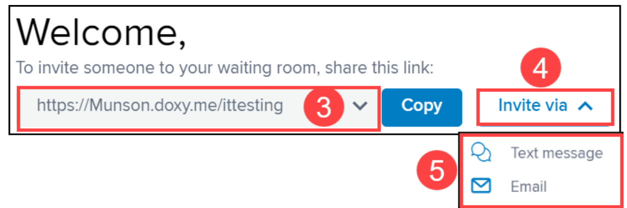
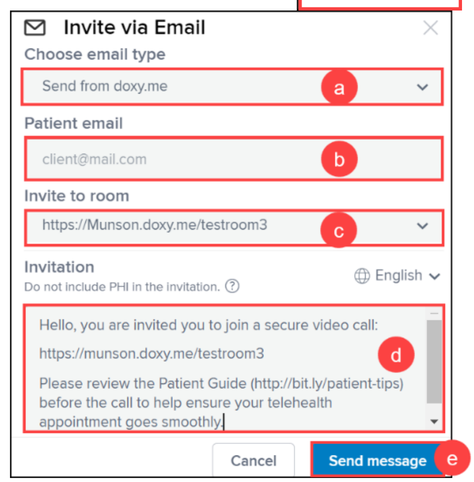
Provider Initiated Video Visit

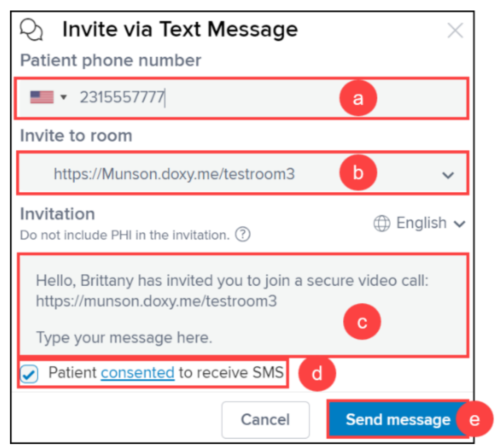
1. Log in to Doxy.me by going to the URL **munson.doxy.me** using Microsoft Edge (Munson's preferred browser), Chrome, Firefox, or Safari browsers.
2. Send the room link to the patient via Text message or Email invitation.
3. Select the correct **shared room**. **DO NOT** use your personal room link.
4. Click **Invite via**.
5. Select either **Email or Text message**.



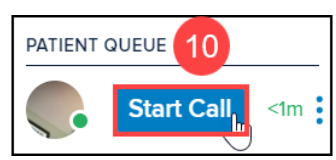
6. If selecting **Invite via Email:**
    a. Ensure **Send from doxy.me** is selected.
    b. Fill in the patient's email.
    c. Select the correct **shared room.**
    d. Edit the Message preview if desired. **Do not** delete the URL link from the message.
    e. Click Send message.



7. If selecting **Invite via Text Message**:
    a. Enter the patient's phone number.
    b. Select the correct room.
    c. Edit the Message preview if desired. **Do not** delete the URL link from the message.
    d. Check the box Patient consented to receive SMS.
    e. Click Send message.



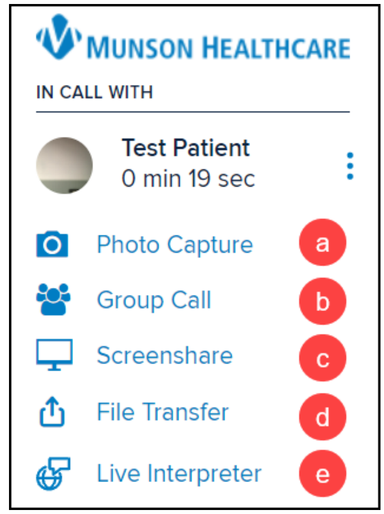
8. Once the patient clicks the invitation link and checks in, they will be entered into the virtual waiting room.
9. Select the patient from the **Patient Queue**.
10. Hover over the patient's name and click **Start Call**.



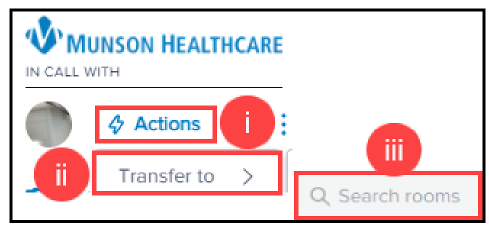
11. The patient will hear a ding to indicate the call has begun.
12. Perform your visit.

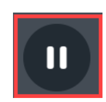
- **In call features**:

13. Click  for Picture in Picture to view charting and see the patient at the same time.
14. Left side menu options when in a call:



   a. Photo Capture takes a picture of your patient.
   b. Group Call is used to invite another person from the waiting room to the call (another provider, patient's family member, etc.).
   c. Screenshare shares your screen with your patient.
      i. You will be able to choose to share your entire screen or the application screen of your choice.
   d. File Transfer allows the transfer of a file to your patient or the ability to request a file from your patient.
   e. Live Interpreter may be requested if needed.
      i. Note: The wait time that is first displayed may be less than what is estimated once the language is selected and the interpreter is requested.
      ii. Interpreter service is charged per minute of use. An interpreter should be requested at or just prior to the time of need.
   f. Patient call transfer is available from within a patient call and the main dashboard.
      i. Hover over the patient's name on the left side menu and click on Actions.
      ii. Select Transfer to.
      iii. Search for and select the desired room.
      iv. Once the room is selected, the patient will be transferred, and an alert will appear on the top of the screen to indicate the patient was transferred.



15. After completing the visit:
   a. If checkout and follow-up **is needed**:
      i. Click the **Pause** button to place the patient back into the virtual waiting room for the patient to be checked out and arrange any needed follow-up. **DO NOT** end the call. 
      ii. Ensure all orders are entered for the patient to allow staff to arrange follow-up.
      iii. Notify staff that the patient is ready for checkout.
   b. If **no** follow-up or checkout is needed, click the **End Call** button. 

16. Document the visit in your practice's EHR.
   a. For documentation details, see the [EHR Education website](#).

17. If needed, notify the appropriate staff if any additional follow-up is needed for the patient using your practice's preferred communication method.