



Video Chat

A quick guide to help get you started.

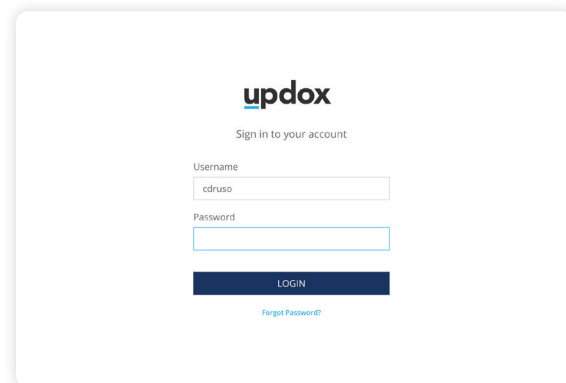
How to use Updox Video Chat

A quick guide to get your practice using Video Chat today.

1

Log in to Updox

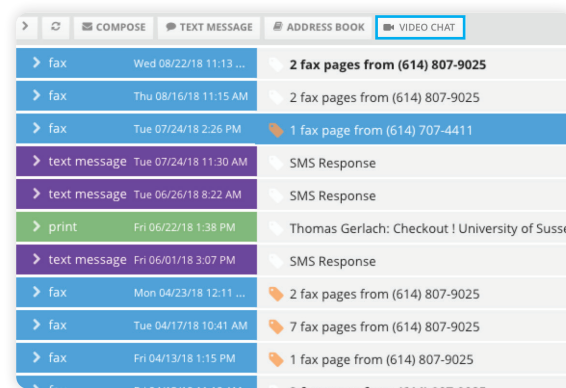
Enter your username and password to log in to your Updox account.



2

Locate the Video Chat button

The Video Chat button is located in the Menu line of the Updox Inbox. To initiate a video chat, simply click the button.

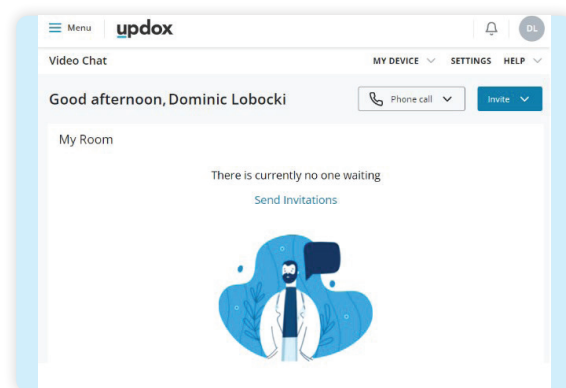


3

The Video Chat page will open in a new window

From the Video Chat page, you will be able to:

- Invite recipients to a Video Chat waiting room
- Invite recipients to participate in a Video Chat session
- View recipients in your Video Chat waiting room



Did you know



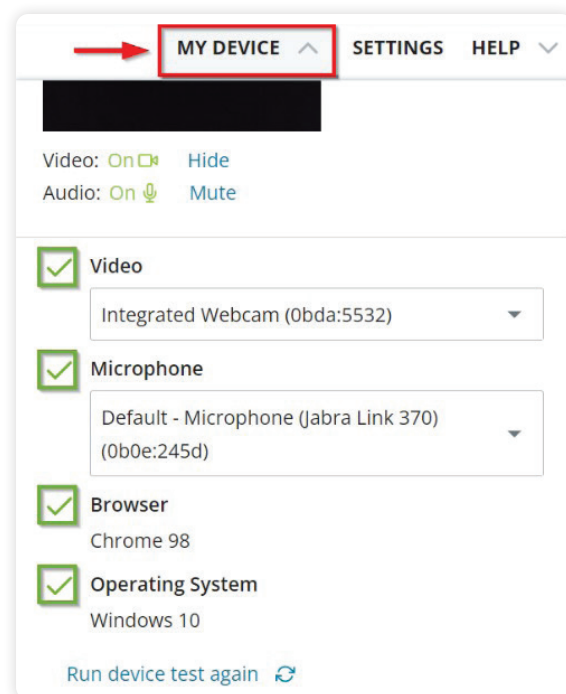
Updox support is always readily available to help. You can reach our support staff by visiting [updox.com/support](https://www.updox.com/support).

Ensure your device is ready to perform a video call

Click on “My Device” located on the top-right of your screen.

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- Check to ensure that you have allowed permissions for your audio and video.
- Double check that you have the correct Camera and Microphone selected.
- If either your Browser or Operating System has an ‘X’ next to it, please refer to our [Video Chat Technical Guide](#) to view our compatible Browsers and Operating Systems.



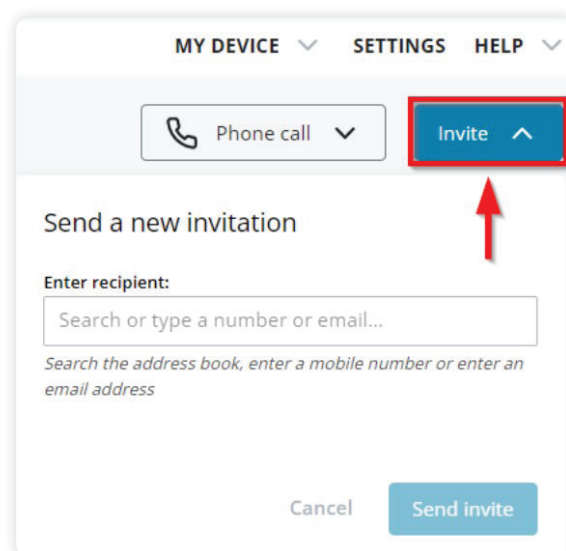
Send the invite to your recipient

Click on the blue, “Invite” button to select who you want to send an invite to. While you type, our system will search through your address book and will populate potential results based upon patient name, mobile number, or email address.

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Based upon the patient’s information in the address book, you may either choose to:

- Text the invite link to their Mobile Number or
- Email the invite link to the Email Address associated with the patient.

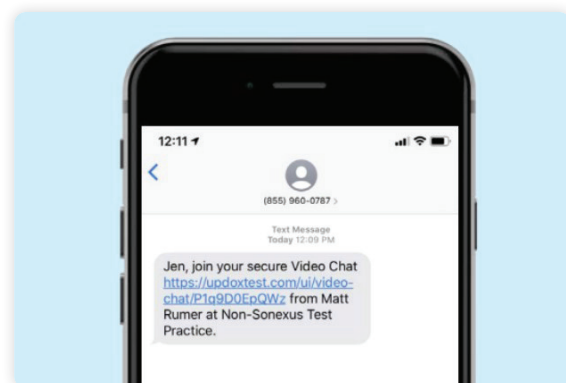


Invite link is sent

An invitation to the Video Chat waiting room or session is sent via text or email to a recipient.

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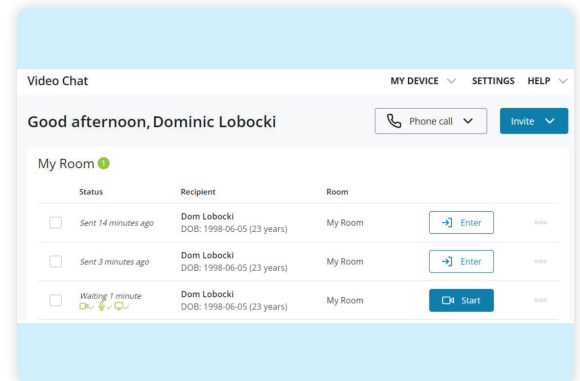
- Video Chat invites will remain active for up to 48 hours.
- Once a Video Chat session is started, you may stay connected for up to 90 minutes.



Managing your Video Chat waiting room

After sending an invite, you will see real-time updates regarding the status of the video chat invitation including:

- View all waiting room invites with the time sent.
- View if a participant has entered the waiting room after an Updox device test and how long he/she has been in the waiting room.
- Begin your Video Chat with up to 10 participants!
 - You may either select all 10 directly from the waiting room or add additional participants to the call after the call begins!

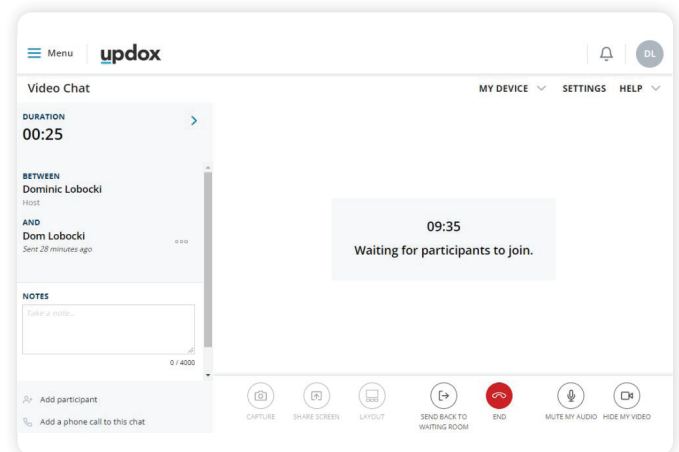


Features to know

Participants are in a HIPAA-compliant, secure environment.

The host of the session can:

- Pause the video and/or audio feed
 - Including the participants' feed
- Capture screenshots and notes
- Add/Remove other participants mid-call
- End the session



Ending Chat & Video Chat Documentation

When the conversation is complete, click the End Chat button to see the Chat Summary page. On this page, the date, time, duration, name and birthdate of the recipient will be displayed.

The summary page acts as documentation of the session. Click to send the summary to the Inbox, where it is saved as a PDF. In the Inbox, you may choose to store it for your records or download it to save to the EHR.

