Admin/PSC Guide for Patient Test Calls via Zoom

Please follow the steps below to conduct a "Zoom Test Call" with your patients. On the day of their visit, the patients will be connecting via Patient Gateway which we cannot replicate for a test, but the steps below will help confirm that the patient has Zoom downloaded onto their device as well as test their audio and video.
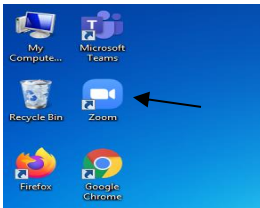
Please reference Epic Integrated Virtual Visits Patient Experience to review the patient experience on the day of their visit.

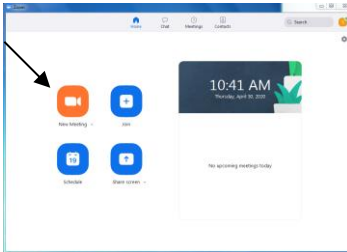*For more advanced troubleshooting, please refer the patient to the Patient Gateway Support Line: 800-745-9683*

Please be sure to Install Zoom prior to any test calls

For "On the Fly" Zoom Test Calls
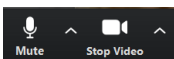
1. Open **Zoom Client** from desktop and log-in

2. Select "**New Meeting**"

3. When video chat begins, select "**Invite**" and copy meeting link by selecting the "**Copy URL**" button

4. Log into EPIC and send a **patient message** through your "**In Basket**". Title the message as "**Zoom Test Call**" and paste the URL in the body of the message and send. Be sure to stay in the Zoom room when you do this otherwise the link will be invalid for the patient.

5. Verify that the patient has received the message in their Patient Gateway and have them open the link and join the meeting with video

6. Verify that the patient is able to download Zoom and that the video and audio are working correctly. The icons below should be used to determine which devices the patient is using for camera and microphone
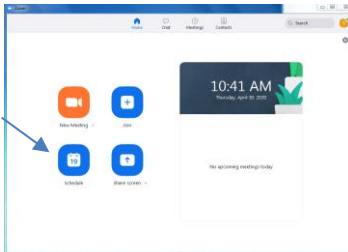
To schedule a Zoom Test Call for a future date

1. Open **Zoom Client** from desktop and log-in
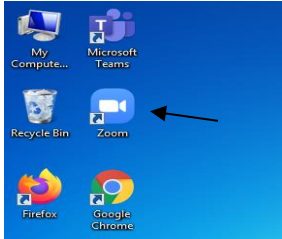
2. Select "**Schedule**"

3. You will be prompted with the "**Schedule Meeting**" options
   a. You can edit the name of the meeting under "Topic".
   b. Select the date, time, and set the duration to 30 minutes.
   c. Ensure the under "Meeting ID" that "Generate Automatically" is selected.
   d. Click "Schedule"

4. This will open an outlook invitation for you
   a. Send this invite to yourself as a reminder to log-in at the scheduled date/time
   a. Copy the Zoom information that is in the body of this invitation
   b. Log into EPIC and send a **patient message** through your "**In Basket**". Title the message as "**Zoom Test Call**" and paste the Zoom information in the body of the message and send.
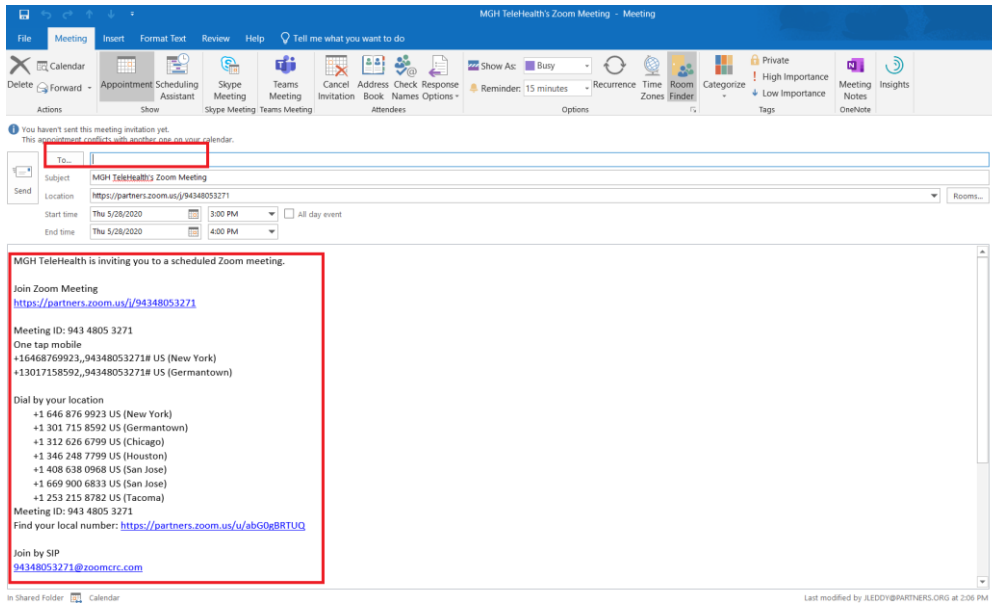
5. On the schedule date/time, call the patient to verify that they were able to download Zoom and access the link you sent them via Patient Gateway

6. Both you and the patient will need to click on the Zoom link for the scheduled session

7. Confirm that the patient's video and audio are working correctly. The icons below should be used to determine which devices the patient is using for camera and microphone