

# MyChart Video Visits: Tips and Troubleshooting

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## Tips

### Before the Visit

- Zoom will be automatically pushed to all Cleveland Clinic iPhones, laptops and computers with a webcam.
- There is no need to create a Zoom account to launch video visits through Epic.
- If you'd like to use a personal computer, download [Zoom Client for Meetings](#). Zoom requires the use of the Chrome browser, which can also be [downloaded for free](#).
- The Video column in the schedule makes it easy to see when the patient has connected, as the icon turns green. If you'd like to launch the video visit on your computer, simply double-click the icon.

### Using the Haiku Mobile App

- Enable push notifications on your phone: select **Settings > Haiku > Notifications**, turn on **Allow Notifications**, and make sure **Lock Screen** is selected. If push notifications are turned off, you will not be able to use Haiku for the video visit.

- When starting the visit in the Intake section of Epic, click **Handoff to Haiku**, and a push notification will appear in your phone. Opening the notification will launch the video visit in Haiku.
- During the visit, if you'd like to switch back to the computer from Haiku, click **Connect to video** in the Intake section of the encounter.

## Finishing the Visit

- The encounter must be closed/signed within three days to ensure appropriate billing.

## MyChart Activation (Adults and Peds)

### Adult Patients

Through Epic, patients are automatically emailed a personalized activation link when their appointment is scheduled, at check in for an in-person appointment, and when discharged from the hospital or ED. Schedulers are also assisting patients with sign-up at the point of scheduling the visit.

- You can also manually send an activation email to your patient. [Follow these instructions](#).
- If an adult patient would like to authorize a loved one to access their MyChart account, they can do so in MyChart using the "Share My Record" feature in the Health menu or by [signing these forms](#) and submitting to HIM.

### Pediatric Patients

Parents access their child's information, including the MyChart Video Visit appointment, through their own personal MyChart account.

- **Biological / adoptive parents who are Cleveland Clinic patients:** Caregivers can add a pediatric patient to their biological/adoptive parent's MyChart account through Epic. [Follow these instructions](#).

Parents with an active MyChart account can also electronically send a request through the "Request Family Access" feature in the Messaging menu in MyChart. HIM will review and add the child to their account.

- **Biological / adoptive parents who are not Cleveland Clinic patients, or court-appointed guardians:** HIM manages these requests. They need to fill out and [submit these forms](#), including guardianship paperwork, if applicable.
- **Parents of patients over the age of 18:** If the patient would like to authorize their parent to access their account/participate in the visits, they can do so in MyChart using the "Share My Record" feature in the Health menu or by [signing these forms](#) and submitting to HIM.

## Troubleshooting Patient Issues

- Patient **fails to connect** to the video at the start of the visit:
  - The patient may have attempted to connect directly through Zoom. They must connect by logging into MyChart and clicking **Begin Visit** from the appointment.
  - Patients may have issues due to pop-up blockers, and may need to go into their browser settings to allow pop-ups. In these cases, it may be easier to use a different video chat app for the visit (such as FaceTime or Duo).

- The patient is experiencing **audio issues**:
  - Click the **Participants** icon in the Zoom window and then click **Unmute All**. This will prompt the patient to unmute.
  - If the patient does not select **Call using internet audio** when starting the video on the phone, they will need to tap the **Join Audio Call** icon in the bottom left-hand corner.
  - You can send a chat message in Zoom to the patient with troubleshooting instructions, click **More**, then **Chat**. Type your message and hit **Send**.
  - The patient must have enabled access to the microphone in their **phone settings** for the Zoom app.
  - If the Zoom video works without audio, you can call the patient and use the phone and video simultaneously; however, the patient will not be able to use the same mobile device for both Zoom and a phone call.
- The patient is experiencing **video issues**:
  - Click the **Participants** icon. If the camera icon is red next to the patient's name, click to prompt the patient to start the video.
  - The patient must have enabled access to the camera in their **phone settings** for the Zoom app.
  - If the video quality is poor, the patient could try switching from using wifi to data on their phone or vice versa. However, the patient may incur charges for using data based on their mobile plan.
- The **connection is lost** during the visit:
  - Try having the patient go back into the appointment in MyChart and start the visit over.
  - If the connection is lost more than 20 minutes after the start of the visit, the patient will be blocked from re-entering. The appointment will have to be switched to another video chat app or a phone call.
- Switching from a video visit to a **phone call or video chat app**
  - If you can't get Zoom video to work, switch to a Cleveland Clinic-approved video chat app (FaceTime and Duo are the preferred options). For more information, refer to these [COVID-19 Telehealth Resources](#).
  - If using a video chat app is not possible, complete the visit with a telephone call.
  - MyChart video visits use a Distance Health encounter, and you can complete the visit without changing the encounter type. Be sure to document in your note whether the visit occurred via telephone or video.

## Frequently Asked Questions

### Department Workflows

#### 1. What visit types are available? Will these only be scheduled in a virtual template block?

These appointments utilize new MyChart visit types for specialty and primary care departments, established and new patients. Specialty visit types will utilize new virtual blocks for established and new patients. Primary care departments are using the current virtual block, 5028.

**2. Can I send questionnaires to patients prior to their visit?**

Pre-visit questionnaires will be sent to the patient in MyChart prior to their appointment the same way it is done today for in-person office visits. A key benefit is that patients are required to complete the questionnaires as a part of the video visit check-in process.

If you'd like to manually send a questionnaire to a patient, you may do so from the [schedule](#) or through a [secure patient message](#).

**3. If a patient completes the MyChart pre-checkin process and then "no shows," is the information lost?**

If the appointment is rescheduled, the patient will not have to complete pre-visit questionnaires again; however, they will have to complete the pre-checkin process prior to their visit.

**4. Is there a way for medical assistants to complete intake (e.g. review medications)?**

If the patient has completed pre-checkin, any updates to medications will be available for reconciliation into the chart. If the patient has not connected to the video (indicated by the camera icon), double-clicking on the patient from the MPS will open the [pre-charting navigator](#).

**5. Can clinicians begin to document in the encounter before launching the video?**

Yes. If the patient has not connected to the video (indicated by the camera icon), double-clicking on the patient from the MPS will open the [pre-charting navigator](#).

**6. What are the guidelines for check-in and check-out times?**

A patient can connect to the video 15 minutes prior and up to 20 minutes after their appointment start time.

**7. If the provider is running late, how long can the patient stay in the video waiting?**

Once the patient is in the Zoom session, it will not time out.

**8. Is there a way to message patients and notify them that you are running behind?**

We are exploring ways to do this with Epic and Zoom. For the time being, we recommend you utilize support staff to call the patient.

**9. Is there a way to conduct the visit with a fellow or resident seeing the patient first, followed by staff?**

We are exploring options for this workflow, stay tuned for details. In the meantime, you can invite your resident or fellow to join the call. From the Zoom meeting, click **Participants > Invite > Send Email**. Outlook will launch with a link to send to the participant. The third-party must download the Zoom app to join the meeting.

## MyChart

**10. Will patients be required to enroll in MyChart to use this service?**

Yes, patients must be signed up for MyChart in order to have a scheduled MyChart video visit.

**11. What if patients do not have MyChart or do not want to activate MyChart?**

MyChart visits are the preferred platform for virtual visits. For the time-being, if a patient refuses to use MyChart, FaceTime or Google Duo can be used; however, these applications are not secure and will soon be phased out.

**12. How do I get my patients signed up for MyChart?**

Patients are automatically emailed a personalized activation link when their appointment is scheduled, at check in for an in-person appointment, and when discharged from the hospital or ED. You can also manually send the activation email to your patient. [Follow these instructions](#).

To add a pediatric patient to their parent's MyChart account, [follow these steps](#).

**13. How does it work for pediatric patients?**

The parent must have the child added to their personal MyChart account. They will then be able to start the video visit from the child's appointment following the same steps.

Follow [these instructions](#) to add a pediatric patient to their parent's account. Parents can also request proxy access through the "Request Family Access" feature in MyChart.

**14. Are there patient instructions available for video visits?**

Yes. Instructions are included within the appointment in MyChart, and patients can find additional information regarding scheduled virtual visits on [clevelandclinic.org](http://clevelandclinic.org).

**15. Can patients schedule these visits themselves in MyChart?**

Not at this time; however, patients will be able to reschedule existing video visit appointments using MyChart.

**16. Does MyChart pre-checkin include JCAHO safety questions?**

No, not at this time.

**17. Is there a way for the patient to upload photos or images?**

This feature will soon be available in MyChart. During the check-in process, patients will be able to upload images and documents prior to the visit. Stay tuned for more details.

**18. Can the patient share their screen in Zoom?**

Yes, in Zoom in the Meeting Settings, turn on the ability to allow participants to share their screen.

## Using Zoom

**19. Are there browser requirements for video visits?**

There are no browser requirements. Chrome is the recommended browser if a provider needs to download Zoom to a computer.

**20. How do I invite a third-party (family member, translator, resident)?**

From the Zoom meeting, click **Participants > Invite > Send Email**. Outlook will launch with a link to send to the participant. The third-party must download the Zoom app to join the meeting.

**21. Does inviting a third party show my email address?**

Yes, at this time, the email invite will come from your Cleveland Clinic email address. We are exploring options to invite participants without sharing provider contact information. Patients can also invite participants using Zoom.

**22. Can I share my screen with the patient?**

Yes. Click **Share Content > Screen**.

**23. Can I record the visit using Zoom?**

No, recording of the visit is not available for patients or providers.

**24. I keep getting a pop up at the start of the visit about connecting to audio. How do I address it?**

When you are on your phone, you should always choose **Call using Internet Audio**. To prevent the pop-up on your phone, click **Settings** in the Zoom app > **Meetings > Auto-Connect to Audio? > Use Internet**. On the computer, click **Always choose this option** to prevent the pop-up from displaying in the future.

**25. What do I tell patients who are concerned about privacy?**

Cleveland Clinic values your privacy and security. MyChart video visits use Zoom for Telehealth, a HIPAA-compliant service that is integrated with Cleveland Clinic's electronic health record and MyChart. This means that your video visit will use a secure, encrypted connection that protects your confidential information.

For added security, we recommend you download the most up-to-date version of Zoom Cloud Meetings (4.6.12 or higher).

**Encounter Documentation**

**26. Can the encounter be converted to a phone encounter if the video doesn't work?**

As this visit uses a Distance Health encounter, you can complete the visit via phone call or another video chat app without changing the encounter type. Be sure to document that the visit occurred via telephone in your note.

**27. I am getting a 'You cannot sign this visit because it is currently being accessed...' error message when attempting to sign the encounter.**

You will receive an error message when trying to close the encounter from the computer if you also have the video visit open in Haiku. Exit the patient's chart in Haiku to resolve the issue.

**28. Can you send education materials via MyChart?**

Yes, these materials should be added into Patient Instructions in the AVS. Patients are able to view the AVS and outpatient progress notes in their Past Appointments in MyChart.