

# Patient Video Visit Checklist

**You have an upcoming video visit with a UChicago Medicine healthcare team member.** We are very happy to offer you the option to have your video visit using MyChart.

**We no longer use Zoom for video visits.** Video visits are now done directly from MyChart.

You do not need to have a MyChart account to start your video visit. However, patients who sign up for MyChart will find it very easy to use.

- **If you do not have a MyChart account, call your care team to get your MyChart account activated.** You can get a text or an email with a link and activation code. You can also get a printed copy of the activation code next time you are in the office.
- **If you have MyChart,** you will get a MyChart message to access your video visit. Use the new link to access your video visit. Do not use any links from past visits.

It is important to prepare for your video visit to make sure your time on the call is well spent. Read this checklist and go online for a short video that will help you be prepared for your visit.

Go to: <https://www.uchicagomedicine.org/video-visits>

**If you have any questions, please call your care team for help.**

## Things You Need for Your Visit

- A computer, tablet, or smartphone** with an internet connection. If using a computer or tablet, have your **phone with you** in case your healthcare team needs to call you.
- A piece of paper and pen** to write down your questions and take notes.
- Your medication bottles.** Have them with you and note the ones that need refills.

**If you use MyChart for the video visit,** click the Test Hardware button to make sure your computer is working properly. **If you use a link sent to your email,** make sure the browser settings allow for microphone and video access.

## Things You May Need

- If you have the needed tools, you can take your own vital signs like your temperature, heart rate, blood pressure, oxygen level, weight or blood sugar.
- If you check your blood sugar or blood pressure on a regular basis, have a **list of the dates and times of your readings.**
- It may help to have a **trusted person** help you during your visit. If you want someone to be in your visit but they are not with you, **share your visit link** so they can join by video.
- If you need to show your healthcare team pictures or documents, **send those ahead of time with MyChart messaging.**
- Headphones may help to lessen outside noise.

# Patient Video Visit Checklist

## A Few Days Before Your Visit

- Find a good space for your visit.**
  - Use an area with **good lighting**, but not one with a window behind you.
  - Make sure your space will be **quiet** for the whole visit. Silence phones and TV.
  - Make sure your space is **private** so you can talk about your personal information or show parts of your body during the exam.
- Write down **your questions** ahead of time.
- Let your clinic know if you need **language translation services**.

## Before Starting Your Visit

- Carefully **follow the instructions sent to you by email or MyChart message** on how to start the video visit. Step by step instructions are shown on pages 3 and 4.
  - Click on the **link** to begin your video visit **15 minutes before your appointment**.
  - If your healthcare team is late, **please wait** for them to join. Call the clinic if the wait becomes too long or you need to make an appointment for another time.
  - **If you get disconnected**, restart the visit by clicking on the same link or wait for your healthcare team to **call** you.
- Get Your Device Ready:**
  - If using a smartphone or tablet, **lean it on something** so it does not move.
  - **Close any extra computer windows or programs** on your device, they can cause problems with the video connection.

## Finishing Your Visit

- Ask your healthcare team **when and how you need to follow up**.
- Use MyChart** to send your care team messages or make follow up appointments
- We may send you a **survey about your video visit**. Your comments are very important to help us improve the care we provide. You can also give feedback about your visit by calling our **Patient and Family Insights department at (773) 834-0500** or by email at [patientinsights@uchospitals.edu](mailto:patientinsights@uchospitals.edu).

**If you have questions or problems, call your healthcare team for help.**

# Step-by-Step Instructions for Patient Video Visit

## 1. Log Into Your MyChart Account

**Communicate with your Care Team**  
Get answers to your medical questions without having to call.

**Request prescription refills**  
Send a refill request for any of your refillable medications.

**Manage appointments**  
Schedule, reschedule, confirm or cancel your next appointment. View details and prepare for upcoming visits.

**Access your test results**  
No more waiting for a phone call or letter - view your results and your doctor's comments within days.

**Manage your account**  
View your billing statements, pay your bill and set up payment plans.

**Access your medical imaging**  
Access medical imaging data electronically. Upload, view, and share images with your provider.

MyChart Username  
Password  
Sign In  
forgot username? forgot password?  
Sign up now  
Get Access to a Child's Account  
Pay As Guest

## 2. Complete eRegistration Before the Visit.

Click eRegistration on the Appointments Reminder.

Welcome!  
F Fernando 5

**Appointment Scheduled**  
UChicago Medicine MyChart Feb 21  
Appointment Status: Scheduled Appointment Information New Patient - ...  
View message

**New Patient - Video Visit**  
Feb 23 Fri  
Join by 8:10 AM CST  
With Jason Alexander, M.D.  
eRegistration  
View details

You have an appointment that needs to be scheduled for your Referral to Ophthalmology. Schedule this appointment.  
Schedule now  
Decline

Your Care Team and Recent Providers  
Tia Kostas, M.D.  
Primary Care Provider Gerontology  
Sachin Shah, M.D.  
Med/Peds  
See provider details and manage

Or, Open Visits for a Full List of Your Upcoming Appointments

Welcome!  
F Fernando 5

**Appointment Scheduled**  
UChicago Medicine MyChart Feb 21  
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# Step-by-Step Instructions for Patient Video Visit

## 2. Complete eRegistration Before the Visit (continued)

Click Complete eRegistration on the Visits Page. You Must Complete eRegistration Before You Can Join.

The screenshot shows the MyChart interface for UChicagoMedicine. The top navigation bar includes 'Your Menu', 'Visits', 'Messages', 'Test Results', and 'Schedule an Appointment'. The 'Appointments and Visits' section contains a 'Schedule an appointment' button and a calendar for February 2024. Under 'Upcoming Visits', a card for a video visit on February 23rd (Friday) is shown. The card details include 'New Patient - Video Visit with Jason Alexander, M.D.', 'Join by 8:10 AM CST', and 'Starts at 8:20 AM CST'. A green arrow points to the 'Complete eRegistration' button on the card. Other buttons include 'Details' and 'Cancel appointment'. The right sidebar shows a calendar view and 'Related Links' including 'Document Center'.

## 3. Possible eRegistration Tasks

You may be asked to verify your primary care doctor and insurance or other information.

The screenshot displays the eRegistration tasks page. The 'Verify Primary Care Provider' section asks 'Is this still your primary care provider (PCP)?' and shows 'Tia Kostas, M.D., Gerontology, Primary Care Provider' with a 'Provider Details' link. Buttons for 'Yes, that's my PCP' and 'Change PCP' are present. The 'Responsibility for Payment' section shows 'Valiente, Jose Fernando' with address and phone number. It includes two questions: '\*We have this person on file to pay for costs not covered by insurance. Is this information correct?' with 'Yes' and 'No' buttons, and '\*Would you like to use insurance to pay for this appointment?' with 'Use insurance' and 'Do not bill insurance' buttons. The 'Insurance on file' section shows 'Medicare / Medicare a&B' with subscriber name 'Valiente, Jose Fernando' and number 'ABC123456'. It includes an 'Add insurance card photos' button and instructions: 'Uploading images of your card now will help speed up the check-in process for your next visit.' At the bottom, there are 'Update coverage' and 'Remove coverage' buttons.

# Step-by-Step Instructions for Patient Video Visit

## 3. Possible eRegistration Tasks (continued)

### You may be asked to answer other questions

#### Vital Flowsheet

For an upcoming appointment with **Jason Alexander, M.D.** on 2/21/2024

[Optional] Please fill in any of the vital signs below that you are able to measure at home and may be relevant to your visit

Date these vital signs were collected on



Please record your Systolic blood pressure (top number)

(mmHg)

Please record your Diastolic blood pressure (bottom number)

(mmHg)

#### Vital Flowsheet

For an upcoming appointment with **Jason Alexander, M.D.** on 2/21/2024

What is your pulse oxygen percentage? (SpO2)

If you are on oxygen, please note how much

What is your temperature in Farenheit?

What is your weight (lbs)?

What is your height (in inches)?

Please make sure to enter your height in inches. e.g. If you are 5 foot 2 inches you should multiple (5X12) = 60 inches + 2 inches for a total of 62 inches


What is your blood glucose?

# Step-by-Step Instructions for Patient Video Visit

## 3. Possible eRegistration Tasks (continued)

**You may be asked to test your hardware.** You can do a hardware test any time before the day of your appointment.

eRegistration



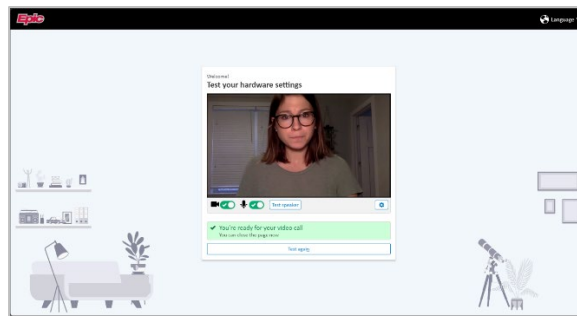
Hardware Test

Before it's time for your video visit, make sure you have a working camera, microphone, and speaker.

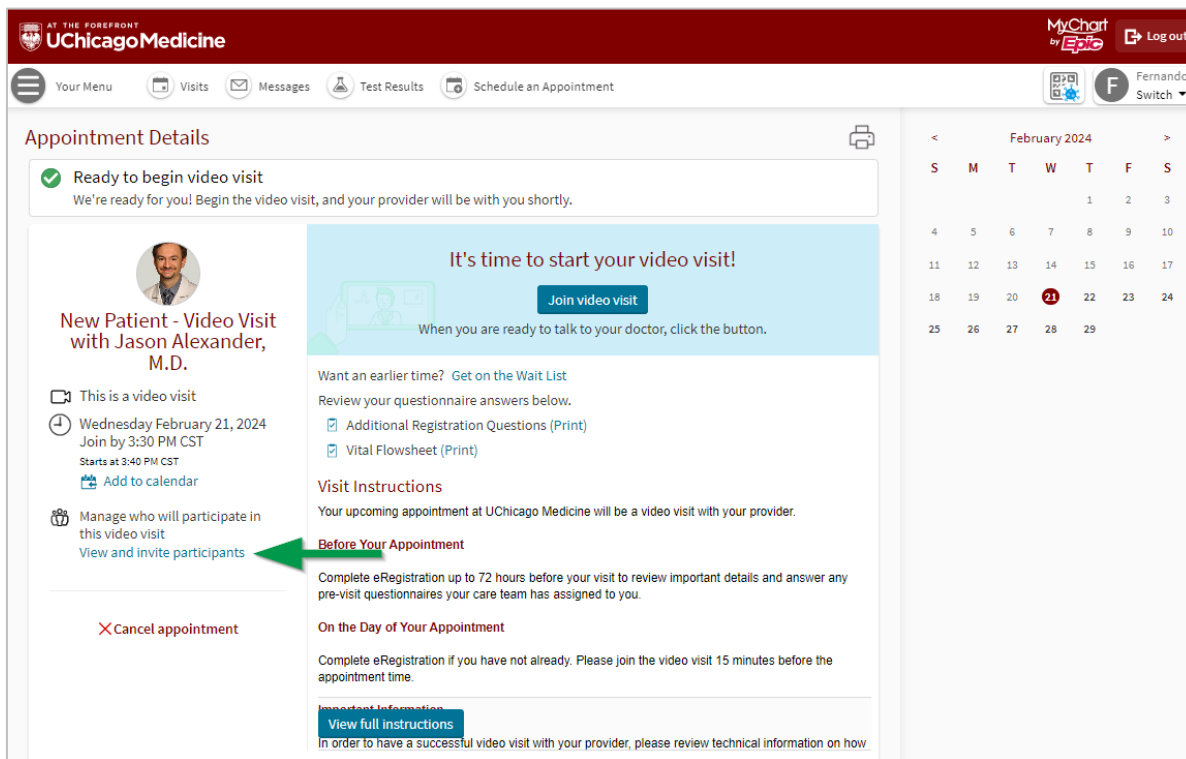
[Test hardware](#)

[Test hardware](#)

Test that your camera and microphone are working.



## 4. Invite Others to Participate or Join Your Video Visit



AT THE FOREFRONT  
**UChicagoMedicine**

MyChart by Epic Log out

Your Menu Visits Messages Test Results Schedule an Appointment

Fernando Switch

### Appointment Details

**Ready to begin video visit**  
We're ready for you! Begin the video visit, and your provider will be with you shortly.

**New Patient - Video Visit with Jason Alexander, M.D.**

This is a video visit

Wednesday February 21, 2024  
Join by 3:30 PM CST  
Starts at 3:40 PM CST  
[Add to calendar](#)

Manage who will participate in this video visit  
[View and invite participants](#)

[Cancel appointment](#)

**It's time to start your video visit!**  
[Join video visit](#)  
When you are ready to talk to your doctor, click the button.

Want an earlier time? [Get on the Wait List](#)  
Review your questionnaire answers below.

- [Additional Registration Questions \(Print\)](#)
- [Vital Flowsheet \(Print\)](#)

**Visit Instructions**  
Your upcoming appointment at UChicago Medicine will be a video visit with your provider.

**Before Your Appointment**  
Complete eRegistration up to 72 hours before your visit to review important details and answer any pre-visit questionnaires your care team has assigned to you.

**On the Day of Your Appointment**  
Complete eRegistration if you have not already. Please join the video visit 15 minutes before the appointment time.

**Need more information?**  
[View full instructions](#)  
In order to have a successful video visit with your provider, please review technical information on how

February 2024

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29		

# Step-by-Step Instructions for Patient Video Visit

## 4. Invite Others to Participate or Join Your Video Visit (continued)

### Click + Invite a new guest

The screenshot shows the UChicago Medicine patient portal interface. At the top, there is a navigation bar with icons for 'Your Menu', 'Visits', 'Messages', 'Test Results', and 'Schedule an Appointment'. Below this, the page title is 'Video Visit Participants' with a subtitle 'View and manage who is invited to this video visit: New Patient - Video Visit at 3:40 PM CST on 02/21/24'. Under the 'Providers and Staff' section, a card for 'Jason Alexander, M.D. (Provider)' is shown as 'Scheduled to join'. The 'Guests' section contains instructions on how to invite guests. At the bottom of the 'Guests' section, a dashed box highlights a button that says '+ Invite a new guest', with a green arrow pointing to it from the right.

### Select Someone to Invite or Invite a New Guest

This screenshot shows the same 'Video Visit Participants' page as above, but with an invitation modal open. The modal has a title 'Select someone to invite:' and contains three buttons: 'Allie Gojn', '+ Invite a new guest', and 'Cancel'. A green arrow points to the '+ Invite a new guest' button from the right. The background page content is partially visible behind the modal.



# Step-by-Step Instructions for Patient Video Visit

## 4. Invite Others to Participate or Join Your Video Visit (continued)

### Choose to Add Someone Or Click Invite a New Guest

If you invite a new guest, you need to enter their contact information. Then click **Send text message invitation**.

Select someone to invite:

Allie Gojn **+ Invite a new guest**

\*First name: Mickey      \*Last name: Mouse

\*Relationship: Grandchild

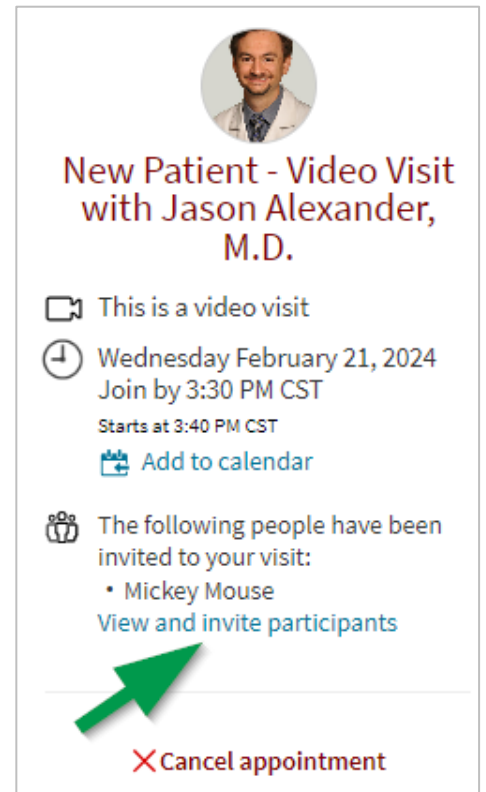
Text message       Email

Phone number: 7737021000

This person has agreed to receive a text message.\*

**Send text message invitation**      Cancel

After you have invited someone, you can manage participants by clicking **View and Invite participants** from your appointment details.



**New Patient - Video Visit with Jason Alexander, M.D.**

This is a video visit

Wednesday February 21, 2024  
Join by 3:30 PM CST  
Starts at 3:40 PM CST  
[Add to calendar](#)

The following people have been invited to your visit:

- Mickey Mouse

[View and invite participants](#)

**Cancel appointment**

### Guests

Invite a guest to join this video visit, such as a family member or caregiver. Guests can join the video visit with the link in their invitation message. Guests may have been invited by your provider.

Mickey Mouse (Grandchild)

Last text sent at: 3:35 PM CST  
To: 7737021000

**Edit invitation**

**+ Invite a new guest**



# Step-by-Step Instructions for Patient Video Visit

## 5. Click to Join Your Video Visit.

You can Join your video visit up to 15 minutes before the start time.

The screenshot shows the MyChart patient portal interface. At the top, there's a navigation bar with "UChicagoMedicine" and "MyChart by Epic" logos, along with a "Log out" button and a user profile for "Fernando Switch". Below the navigation bar, there are tabs for "Your Menu", "Visits", "Messages", "Test Results", and "Schedule an Appointment".

The main content area is titled "Appointment Details" and features a green checkmark indicating the patient is "Ready to begin video visit". A message states: "We're ready for you! Begin the video visit, and your provider will be with you shortly." On the left, there's a profile picture of Jason Alexander, M.D., and text identifying the appointment as a "New Patient - Video Visit with Jason Alexander, M.D.". It specifies the date as Wednesday, February 21, 2024, at 12:30 PM CST, and includes an "Add to calendar" button. A "Cancel appointment" button is also visible.

The central part of the screen has a large blue banner that says "It's time to start your video visit!" with a green arrow pointing to a "Join video visit" button. Below this, there are sections for "Want an earlier time? Get on the Wait List", "Review your questionnaire answers below" (with checkboxes for "Additional Registration Questions", "Medicare Coverage", and "Vital Flowsheet"), "Visit Instructions", and "Before Your Appointment" and "On the Day of Your Appointment" sections. A "View full instructions" button is present under the "Visit Instructions" section.

On the right side, there is a calendar for February 2024, with the 21st highlighted in red. At the bottom of the appointment details, there is a "Back to Appointments and Visits" button.

The screenshot shows the Epic video visit interface. At the top left is the "Epic" logo, and at the top right is a "Language" dropdown menu. The main area features a central video window showing a patient named Cindy. Above the video window, it says "Welcome! Get ready for your call at 9:20 AM". Below the video window, there are icons for video, audio, and background effects, along with a "Test speaker" button. A green banner below the video window says "You're ready for your video call". At the bottom, there is a "Display name" field with "Cindy" entered and a "Join call" button. The background of the interface is light blue with decorative icons of a lamp, a plant, and a telescope.