

athenaOne Virtual Visit Patient Workflow

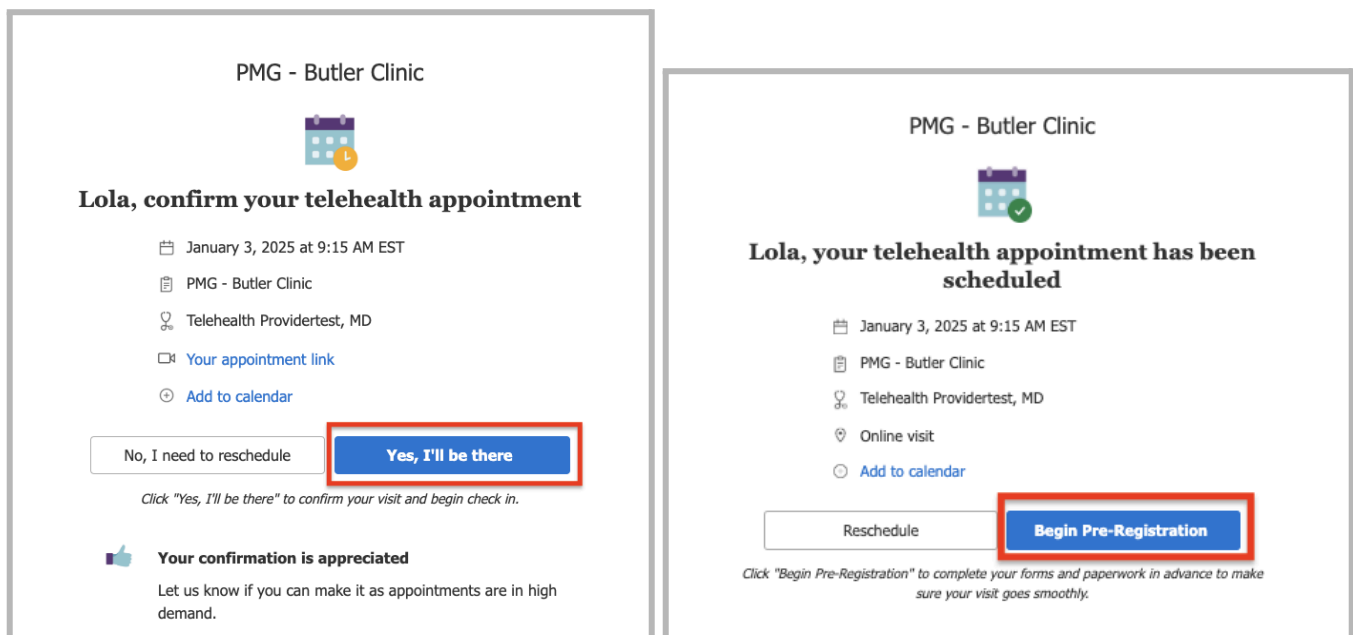
This workflow guide covers the patient workflow for virtual visits including how they receive notifications to join the visit, joining the visit, and features within the virtual visit.

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Email and Text Communications

1. Patients will receive a text or email with the appointment self check-in information and link to join the virtual visit. When a virtual visit appointment is within three hours from the time it is scheduled or rescheduled, the patient receives an automatic confirmation email. The patient can click: Yes, I'll be there to confirm the appointment and start self check-in from the confirmation email or they can select "Begin Pre-Registration" from the reminder email.
 - a. For more information on the self check-in process, please see the guide: [athenaOne Workflow: Enhanced Self Check-in.](#)



2. The patients will also be able to access their visit from both the confirmation email (screenshot on the left) and at the bottom of the reminder email (screenshot on the right) via the appointment link. The link will activate on the day of the appointment to bring them into the virtual visit, but it allows them to do a device check prior.

PMG - Butler Clinic



Lola, confirm your telehealth appointment

📅 January 3, 2025 at 9:15 AM EST


📄 PMG - Butler Clinic

👤 Telehealth Providertest, MD

Your appointment link


🕒 Add to calendar

Click "Yes, I'll be there" to confirm your visit and begin check in.

 **Please take a few moments to prepare for your online call**

You will need

- A web browser that works with our telehealth system:
 - **iPhone:** Safari (v.12 and later)
 - **Android phone:** Chrome (latest 3 versions) or Samsung Internet (v.12 and later)
 - **Mac computer:** Chrome (latest 3 versions), Firefox (latest 3 versions), or Safari (v.12 and later)
 - **Windows computer:** Chrome (latest 3 versions), Firefox (latest 3 versions), or Edge (v.79 and later)
- A smartphone or computer with internet connection and a full battery

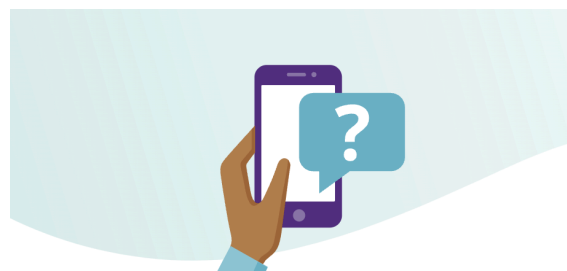
 **Before your visit**

- Install the latest web browser updates to your device to make sure your call goes smoothly
- Run our [pre-call device check](#) to make sure your technology is set up

Looking for your appointment link?
[Click here to start your call](#)


Device Check

1. The virtual visit appointment link will not activate until the day of the appointment, but patients can complete a device check prior to the appointment.

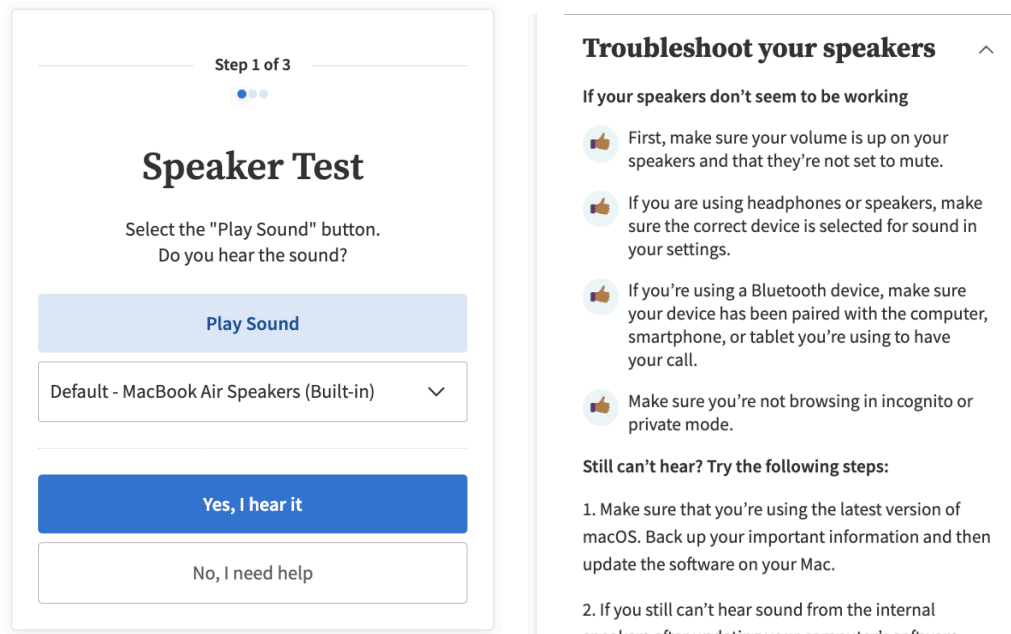


Let's get started



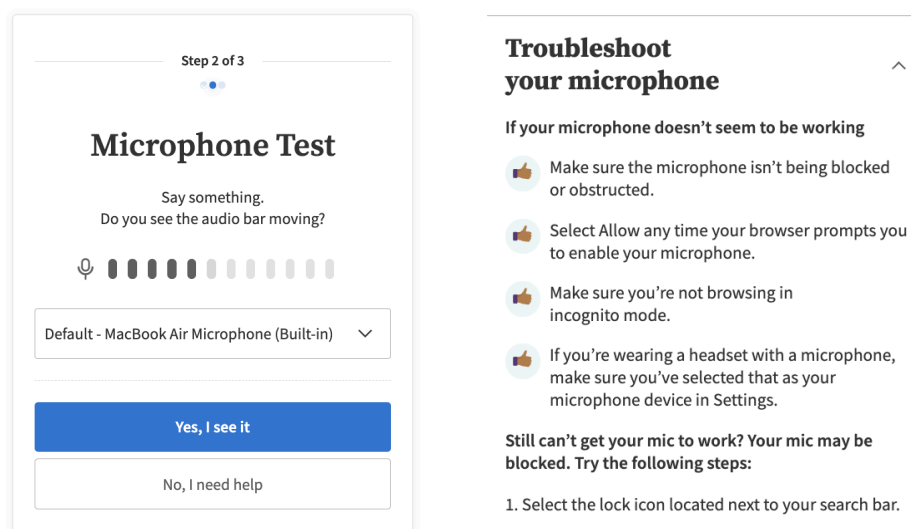
 Click "allow" when your browser asks for access to your camera and microphone.

2. The device check starts with the speaker test. The speaker used will appear in the dropdown and the patient can change the speaker selection if needed. After the patient selects Play Sound, a sound will play and if the patient hears the sound, they move forward with the device check after selecting “Yes, I hear it”. If the patient selects “No, I need help”, then a troubleshooting guide appears.



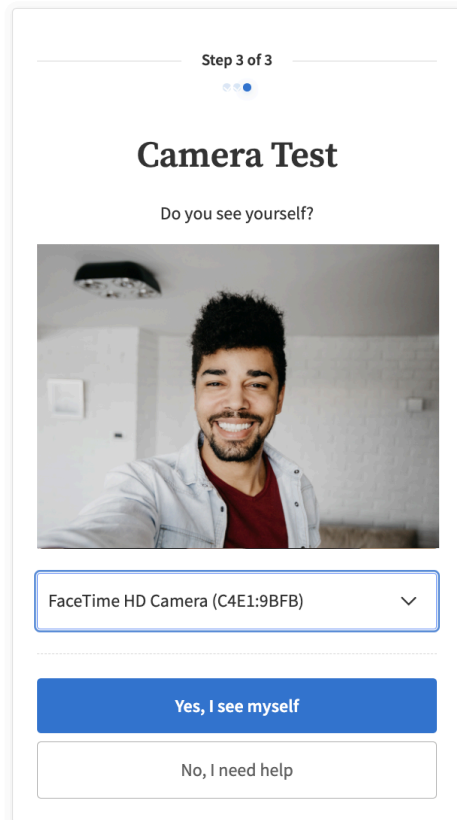
The screenshot shows a two-part interface. On the left is the 'Speaker Test' screen, labeled 'Step 1 of 3'. It features a title 'Speaker Test', instructions to 'Select the "Play Sound" button. Do you hear the sound?', a 'Play Sound' button, a dropdown menu showing 'Default - MacBook Air Speakers (Built-in)', a 'Yes, I hear it' button, and a 'No, I need help' button. On the right is a 'Troubleshoot your speakers' sidebar. It includes a section 'If your speakers don't seem to be working' with four tips: check volume, ensure correct device is selected, verify Bluetooth pairing, and avoid incognito/private mode. Below this is a section 'Still can't hear? Try the following steps:' with two numbered steps: 1. Update macOS and back up data; 2. Update internal speakers after software update.

3. Next the patient tests their microphone. The microphone used will appear in the dropdown menu and the patient can change the microphone selection if needed. The patients speak into their device's microphone and observe the audio bar moving up and down to confirm sound is being detected. If they select “No, I need help”, then the troubleshooting guide appears.



The screenshot shows a two-part interface. On the left is the 'Microphone Test' screen, labeled 'Step 2 of 3'. It features a title 'Microphone Test', instructions to 'Say something. Do you see the audio bar moving?', an audio bar with a microphone icon and ten vertical bars, a dropdown menu showing 'Default - MacBook Air Microphone (Built-in)', a 'Yes, I see it' button, and a 'No, I need help' button. On the right is a 'Troubleshoot your microphone' sidebar. It includes a section 'If your microphone doesn't seem to be working' with four tips: unblock microphone, allow browser prompts, avoid incognito mode, and select headset microphone in settings. Below this is a section 'Still can't get your mic to work? Your mic may be blocked. Try the following steps:' with two numbered steps: 1. Select lock icon next to search bar; 2. Select dropdown menu next to camera.

4. Lastly, patients will check their camera. An image of the patient from the device's camera will appear. The patient can update the camera used in the dropdown if needed. The patient can then indicate whether it's working by selecting "Yes, I see myself" or if they select "No, I need help" then the troubleshooting guide appears.



Troubleshoot your camera

If your camera doesn't seem to be working

- Make sure your camera is not obstructed and is clean of dirt or smudges.
- Select Allow any time your browser prompts you to enable your camera.
- Make sure you're not browsing in incognito mode.
- If you're using a web cam connected to your device, make sure you've selected that as your video device in Settings.

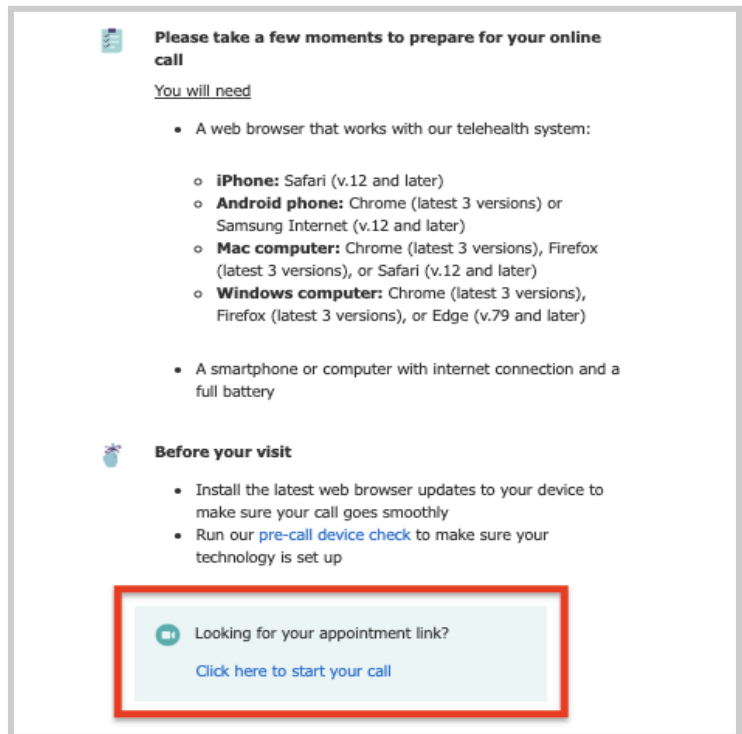
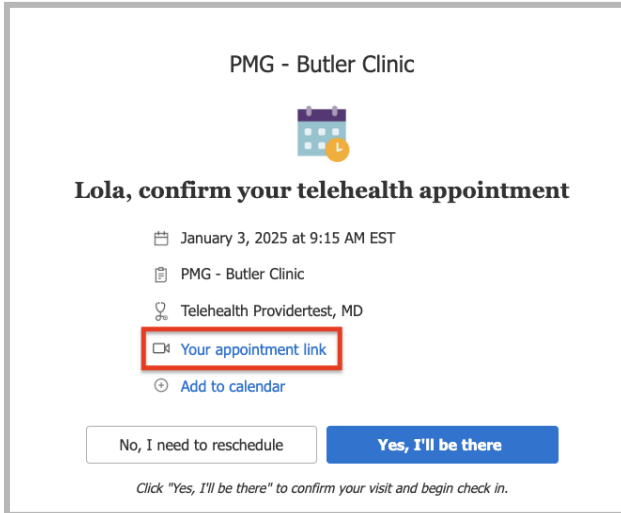
Still can't get your camera to work? It may be blocked. Try the following steps:

- Select the lock icon located near the right side of your search bar.
- Select the dropdown menu next to camera and microphone.
- Change the camera and microphone access to Allow.
- Refresh the browser tab (cmd + R).

Still have questions? Please contact your practice.

Accessing the Virtual Visit - Email Link

- The patients will be able to access their visit from both the confirmation email (screenshot on the left) and at the bottom of the reminder email (screenshot on the right) via the appointment link. The link will activate on the day of the appointment to bring them into the virtual visit, but it allows them to do a device check prior. Clicking this link will open the virtual visit directly in their preferred browser window. If disconnected, this link will bring them back into the visit as well.



2. The patient then enters the name, if they are the patient, and consents to telehealth terms of use. After selecting Next, they are admitted to the visit.

Get ready for your visit with
Telehealth Providertest, MD
on
Friday at 9:15 am

What is your full name? *

Are you the patient?

By joining the telehealth encounter, I agree to the [athenaTelehealth Terms of Use and Informed Patient Consent](#)

Click **Allow** when your browser asks for access to your camera and microphone.

Next

Accessing the Virtual Visit - Text Message

1. A text is sent with the appointment information information and link to joining.

Your online appt is at 9:15am EST on 1/03 with Telehealth Providert. <https://telehealth.px.athena.io/join/WFBNfYPm0w4byideKMGD.2903> Join 5-10 mins before. Reply STOP to opt out.

- The patient then enters the name, if they are the patient, and consent to telehealth terms of use. After selecting Next, they are admitted to the visit.


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 Click **Allow** when your browser asks for access to your camera and microphone.

Next

- If they are not the patient, then they can select another option from the dropdown.

Are you the patient?

- ✓ Yes, I am the patient
- No, I am a caregiver
- No, I am a family member
- No, I am a friend
- No, I am another care provider
- No, I am an interpreter
- Other

- The visit will open directly in their preferred browser window on their phone.


Accessing the Virtual Visit - Patient Portal

- From the homepage of the portal, you'll see the appointment information and can join the appointment directly from the link.

Friday, January 3rd 2025 at 9:15 am

Telemedicine Visit with Telehealth Providertest, MD

 [Join telehealth call](#)

 Please arrive 10 - 15 minutes early and bring your insurance card, photo ID and any co-payment or outstanding balances, which will be collected at your visit. If you need to reschedule, you must provide 24 hours notice to avoid a no-show fee.

Manage Appointment

- The patient then enters the name that will display in the virtual visit window, selects if they are the patient or select their relationship to the patient, and consent to telehealth terms of use. After selecting Next, they are admitted to the visit.

Get ready for your visit with

Telehealth Providertest, MD


on
Friday at 9:15 am

What is your full name? *

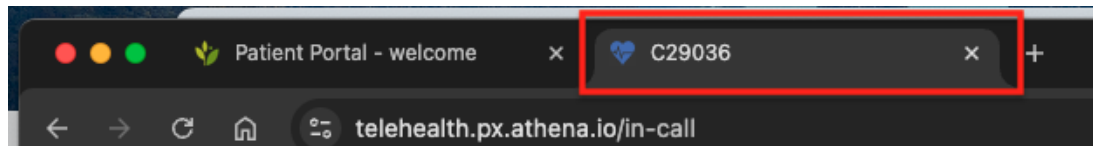
Are you the patient?

Yes, I am the patient

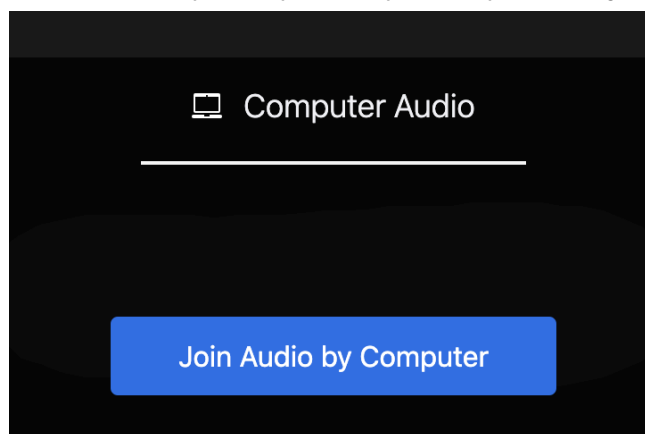
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 Click **Allow** when your browser asks for access to your camera and microphone.

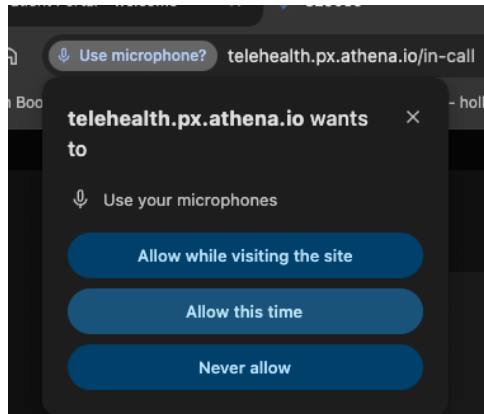
- The visit will open directly in another tab in that browser window.



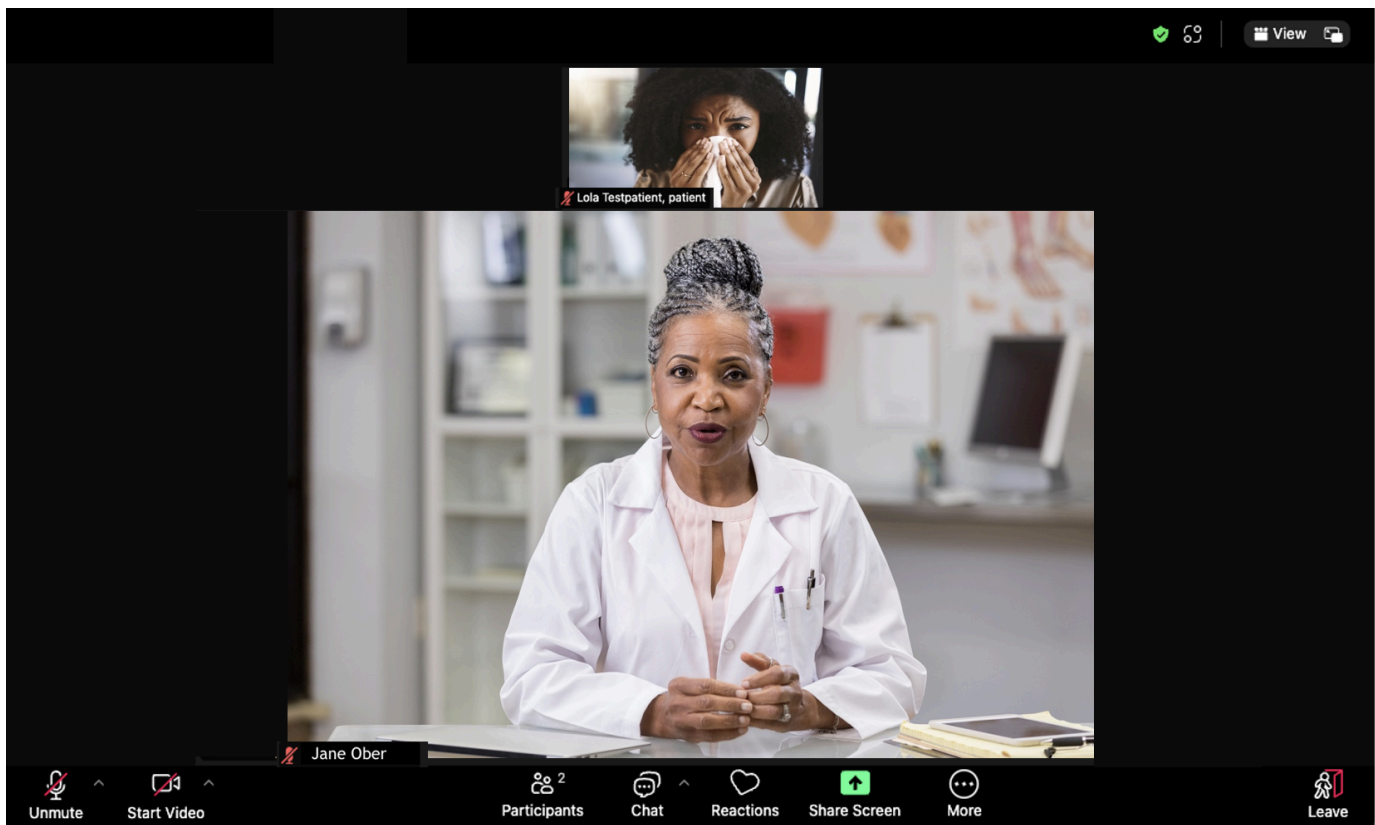
- After opening the visit, it will prompt the participant to join audio via their device.



5. A pop up might appear, indicating that device would like to use the microphone for the virtual visit. The patient should select Allow this time or allow while visiting the site to utilize the microphone for the visit.

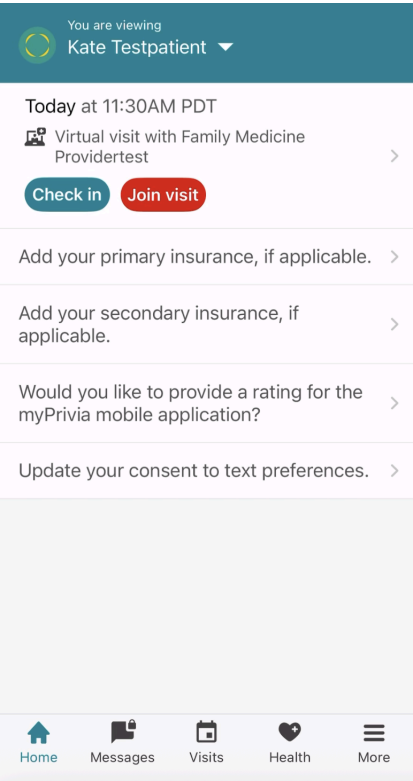


6. The patient will appear at the top of the window with a larger view of the provider.

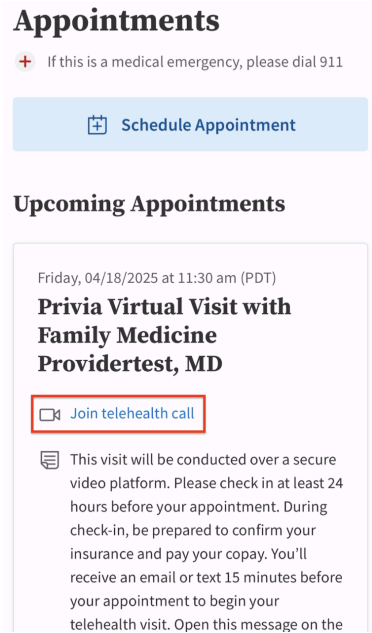


Accessing the Virtual Visit - myPrivia App

1. From the homepage of the app, it will show the upcoming appointment. Click “Join visit”.



2. The device’s preferred browser will open and it will show the patient’s portal account and their visit on the homepage. Select Join Telehealth Call



- The patient then enters the name, if they are the patient, and consent to telehealth terms of use. After selecting Next, they are admitted to the visit.


Get ready for your visit with
Telehealth Providertest, MD
on
Friday at 9:15 am

What is your full name? *

Are you the patient?

Yes, I am the patient

By joining the telehealth encounter, I agree to the [athenaTelehealth Terms of Use and Informed Patient Consent](#)

 Click **Allow** when your browser asks for access to your camera and microphone.

Next

- If they are not the patient, then they can select another option from the dropdown.

Are you the patient?

✓ Yes, I am the patient

No, I am a caregiver

No, I am a family member

No, I am a friend

No, I am another care provider

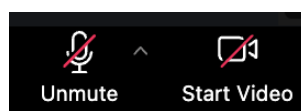
No, I am an interpreter

Other

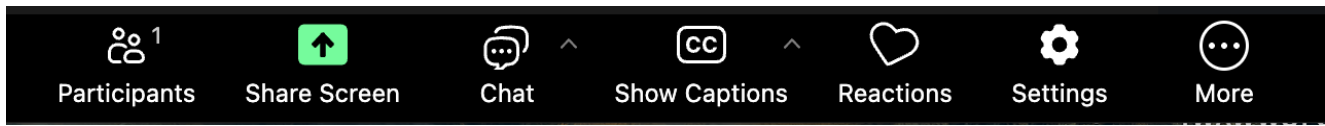
- The visit will open directly in their preferred browser window on their phone.

Virtual Visit Settings

- In the virtual visit, it will show the patient as their name, patient. For example: Lola Testpatient, patient. It will show the participants as their name then participant title.
- The patient has the option to mute and turn off their camera in the bottom right.



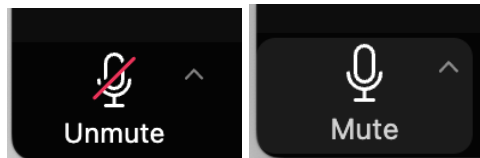
- In the center toolbar, the patient has the following options:



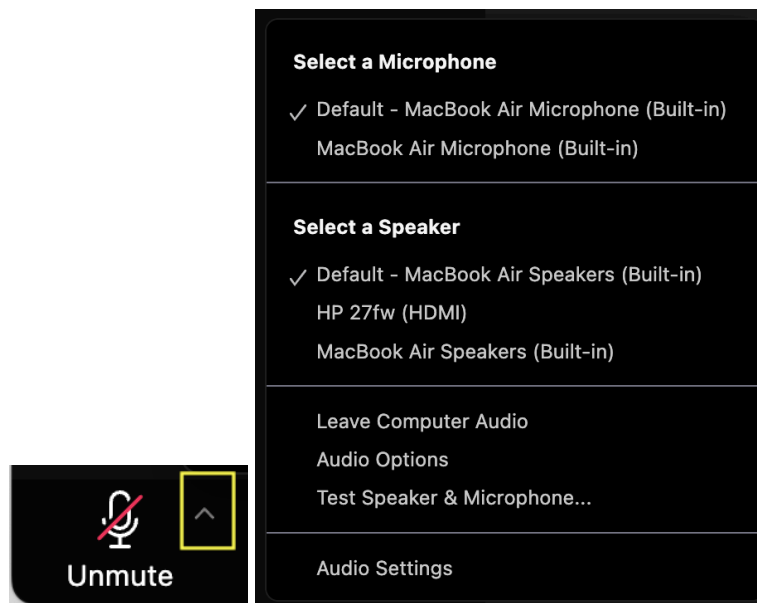
- a. **Participants** - View all participants in the virtual visit. Up to four participants can be in the visit at a time.
- b. **Share Screen** - Share a tab, window, or entire screen
- c. **Chat** - The chat icon will open up a chat menu on the right side. The chat will activate once another participant has joined the call.
- d. **Show Captions** - Add closed captions in a variety of different language options
- e. **Reactions** - Send reactions of different emojis or raise a hand
- f. **Settings** - Adjust different settings like audio or visual settings or change their background.

Audio and Video Setting Adjustments

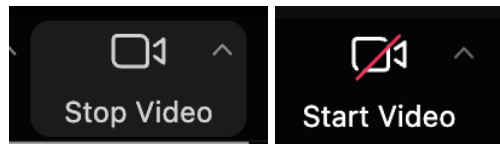
1. To mute or unmute, select the microphone icon in the bottom left corner.



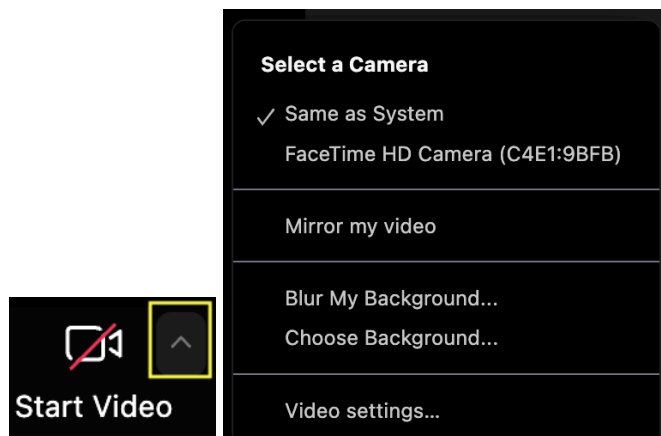
2. To adjust or change audio settings select the arrow next to the microphone icon and update your microphone or speaker settings.



3. To turn the camera on or off, select the camera icon.

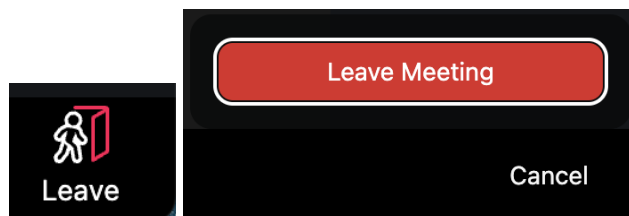


4. To adjust or change video camera settings select the arrow next to the camera icon and update your camera settings.



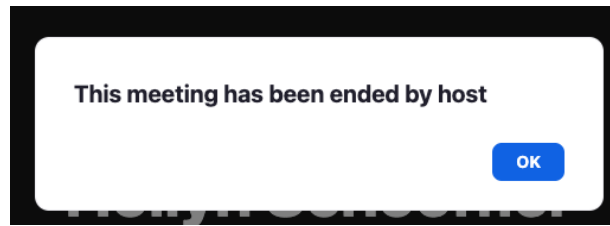
Leaving the Virtual Visit

1. When the virtual visit is over, patients can leave in the bottom right corner by selecting “Leave” then “Leave Meeting”

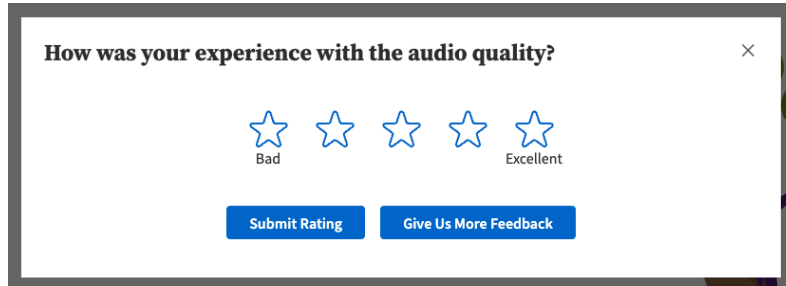


The Visit Ends by the Provider

1. If the provider ends the virtual visit, the patient will see a notification that the meeting was ended by the host.



2. It gives the patient the option to provide feedback on the experience.



3. Afterwards the patient receives this screen and has the option to report any technical issues if needed.

