

# Quick Start Guide

## myChart Video Visits

Technical Requirements .....	2
Scheduling a Video Visit .....	2
Sign Up for myChart .....	3
Download MyChart Mobile .....	4
Download and Test ZOOM .....	6
PreCheck-In for your Video Appointment .....	7
It's Time for your Video Visit .....	12

A Video Visit may eliminate the need to see your provider in the office, saving you time and permitting you to maintain social distancing when your health or your provider's might be at risk. However, a Video Visit may not be a substitute for all office visits. In some circumstances, your provider may determine that an in person visit

This document will walk you through the steps of having a successful Video Visit with your UMass Memorial Health Provider.

# Technical Requirements

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To participate in a Video Visit, you must have:

- Reliable internet connection
- myChart account
- Personal Device with ZOOM downloaded
  - If you will use a smartphone, Android or iPhone:
    - MyChart Mobile application downloaded
    - Ear buds or headphones, to reduce noise
  - If you will use a tablet, Android or iPad:
    - MyChart Mobile application downloaded
    - Ear buds or headphones, to reduce noise
  - If you will use a laptop or desktop computer:
    - Webcam, built in or a SB plug-in
    - Earbuds or headphones, to reduce noise

**\* Mobile devices are the preferred method, as camera and microphone are typically setup by default.**

## Scheduling a Video Visit

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UMass Memorial Health is providing Video Visits with Providers conducted securely and easily from your myChart account. You can schedule these types of visits by calling your office or by calling 855-UMASS MD. They are **not** available for you to schedule or request yourself via myChart at this time. Once your appointment is scheduled, you will need to perform some steps to ensure proper device set-up and proper appointment preparation. UMass Memorial Health will call you 1-2 days prior to your scheduled appointment to ensure that you have set up your device properly and that you have performed the necessary PreCheck-In steps.

# Sign Up for myChart

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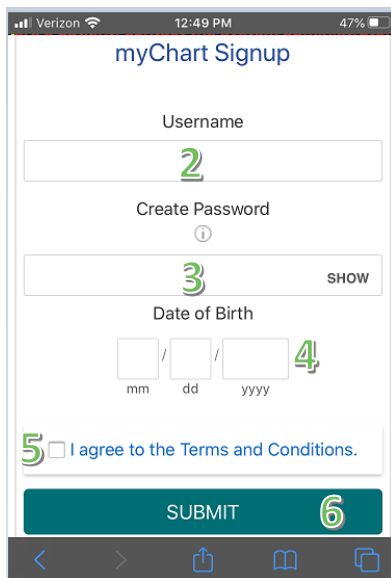
When your appointment is scheduled, you will be asked which email address you would like to use for communication. If you are not already using myChart, UMass Memorial's secure patient portal, you will be sent an activation email.

Upon receipt of the activation email, you will:

1. Select the link in your email.



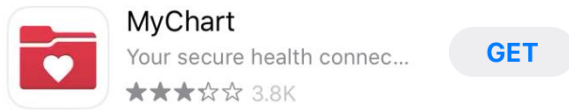
2. Select your Username (min 6 characters, case insensitive).
3. Select your Password (min 8 characters – upper and lower case with numbers and letters, case sensitive).
4. Enter your Date of Birth, for identification match.
5. Select the “I agree to the Terms and Conditions” checkbox.
6. Select **Submit**.



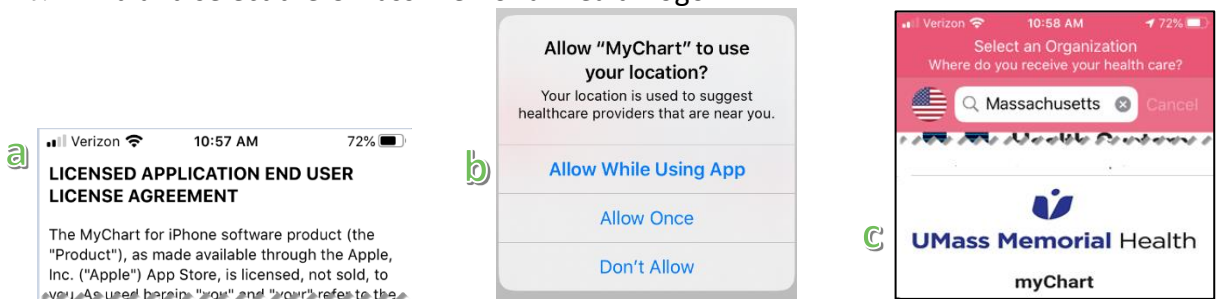
# Download MyChart Mobile

If you intend to conduct your Video Visit on your smartphone or tablet (the PREFERRED methods), you must download the mobile application.

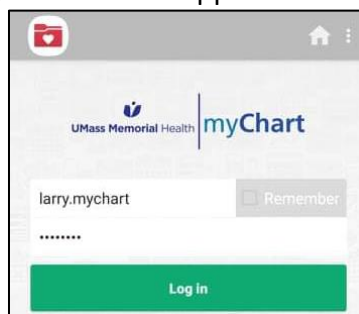
1. From the Play Store or iTunes, enter **MyChart** in the search field. Find and select the MyChart entry with the following icon and select **GET**.



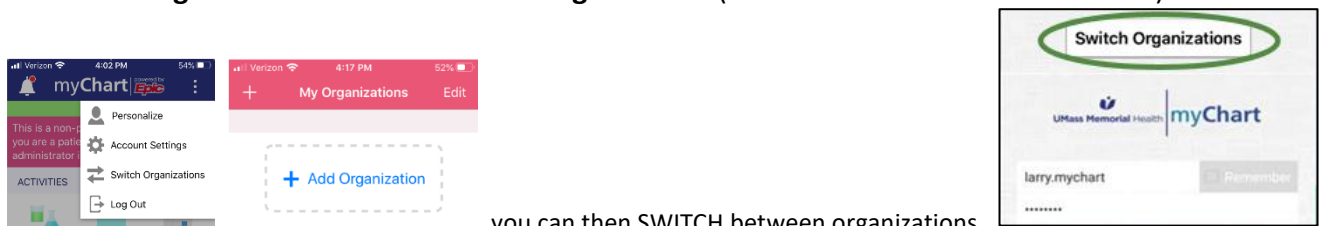
2. Open the newly loaded MyChart application
  - a. Read/accept the terms.
  - b. Allow the application to access your location, select **ALLOW WHILE USING APP** in order to see all of the Epic healthcare organizations near them (or else you will have to search through all 50 states).
  - c. Find and select the UMass Memorial Health logo.



3. You are now ready to Log In to your MyChart mobile application.



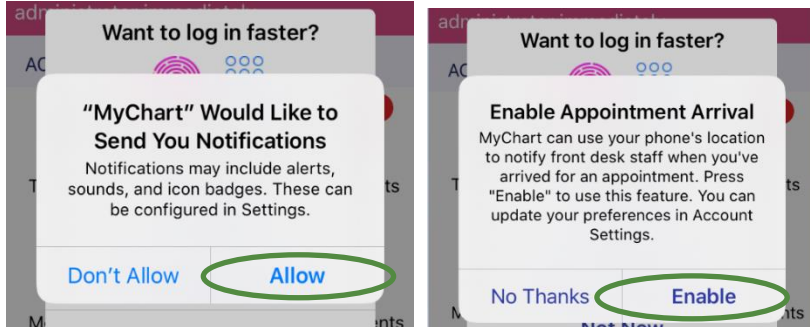
- ❖ If you already have MyChart from another organization, such as Reliant, you do NOT need to download again. This would simply require **ADDING** UMass Memorial Health via the options menu in the top right. Select **Switch Organizations** and then **+ Add Organization** (and add UMass Memorial Health).



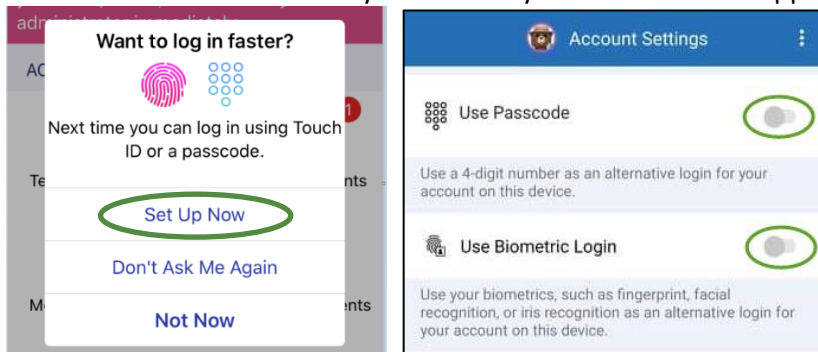
you can then SWITCH between organizations.

- ALLOW Notifications in order to accept PUSH notifications regarding appointment reminders, new test results, messages from their provider care team, etc.  
If prompted, also ENABLE appointment arrival functions to improve your waiting room, checkin and arrival experience.\*

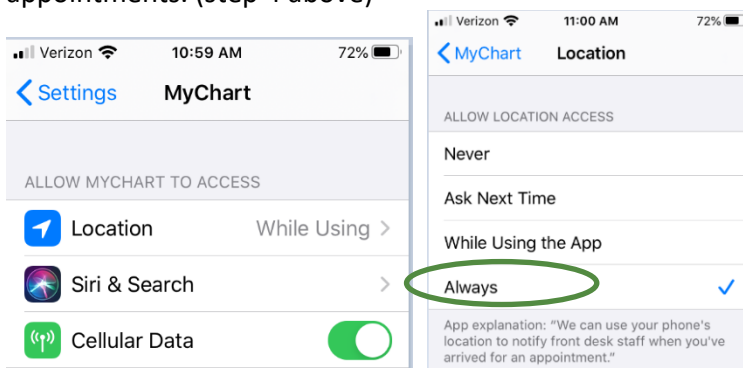
\* This is only available in a few select locations at this time but by setting this now, you will be ready when your provider's department is added.



- We Recommend that you setup **Biometric Login** or **Passcode** for the MyChart mobile application. This reduces the chance that you will lock yourself out of the application (due to mistyping/failed attempts).



- Go to your SETTINGS on the device and find the MyChart application. From there, make sure that LOCATION is set to ALWAYS so that you can accept and respond to Notifications from myChart when you arrive for appointments. (step 4 above)

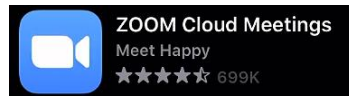


MyChart for iOS and MyChart for Android are portable versions of MyChart that you can use to manage your health information on the go. The mobile apps contain many of the same features as the MyChart website, allowing you to do all the following, and more!

# Download and Test ZOOM

In conjunction with downloading MyChart, the patients will **also** need to download the ZOOM application. ZOOM will be the platform that is used to host the video visit. You will NOT need to create a ZOOM account, because UMass Memorial Health is inviting you, you will be using our account that is one designed for healthcare privacy.

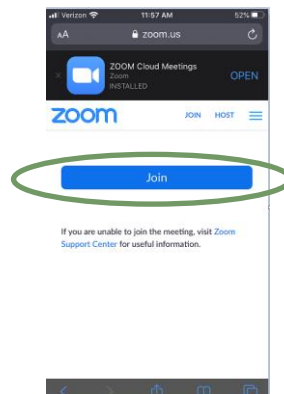
From the Play Store or iTunes, enter **ZOOM** in the search field. Find and select the app with the following icon.



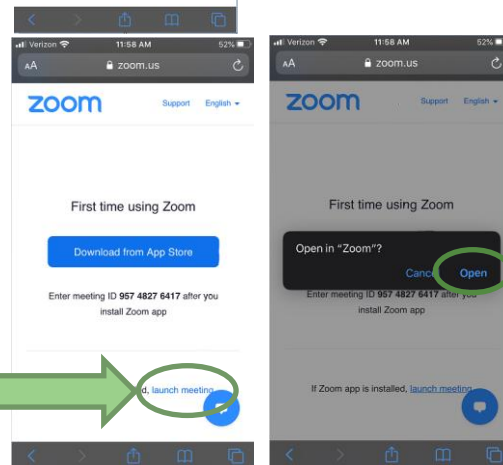
Once you have downloaded the ZOOM App, you do not need to Sign -Up. This will automatically open once you are in myChart starting the Video Visit – it connects behind the scenes.

After downloading ZOOM, you can test that it works correctly on your device by starting a test ZOOM.

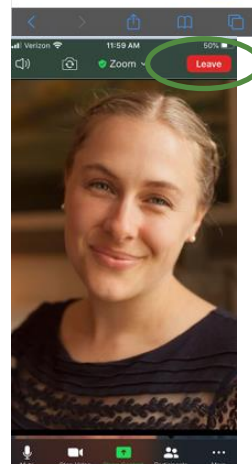
1. Navigate to <https://ZOOM.us/test> and Select **Join**



2. Because you have already downloaded the ZOOM application, Select **launch meeting** And then **Open**



3. You will get a test preview of yourself on camera – check that your full face is shown and then select **Join with Video**.
4. After joining with Audio, you will be IN a ZOOM meeting – a successful test. You are now technologically ready to have a ZOOM meeting with your provider.
5. Select **Leave Meeting** to complete the test.





# PreCheck-In for your Video Appointment

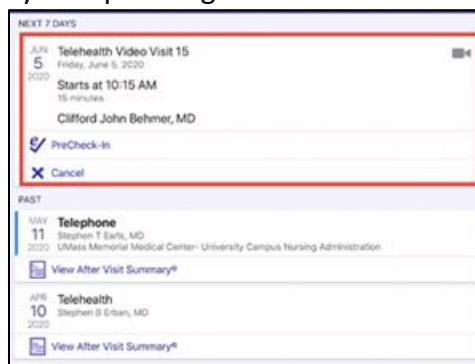
The following steps can be completed on a laptop or desktop using the web application, but we will focus on the mobile application.


Just like with the airlines, we allow for you to perform a PreCheck-In up to 7 days of your scheduled appointment. By Completing these steps in advance, you can do them comfortably from home and it will reduce the steps and time needed upon arrival to your appointment.

To Complete your PreCheck-in, follow the steps as directed in the myChart App. This document will provide an overview of the steps included:

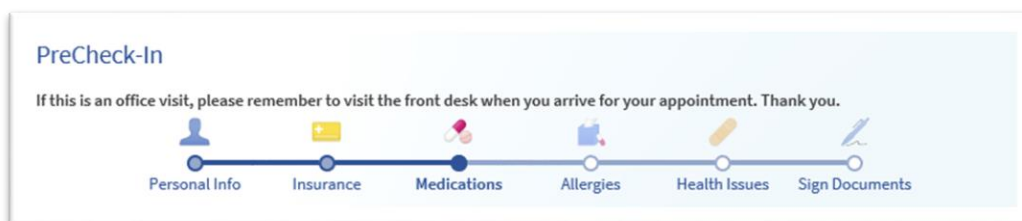
1. Log in your MyChart App 

2. Select the Calendar icon to access your upcoming visit.  Visits



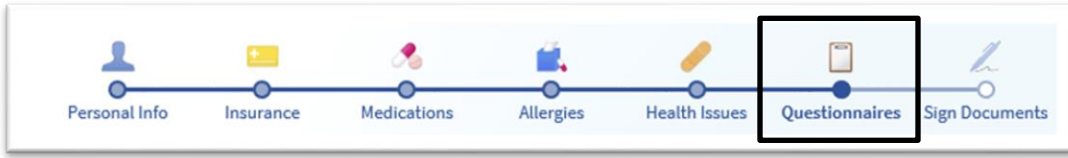
3. From the Visits screen, select  PreCheck-In this will Start the PreCheck-In process. PreCheck-In allows you to update demographics, answer screening questions and even e-sign your consents. If you have any questions about the below process, you can contact 855-UMASS MD.

myChart will walk you through each step. There is a Progress Bar at the top of the page to show your progress as you move through the components of PreCheck-in (As shown below)

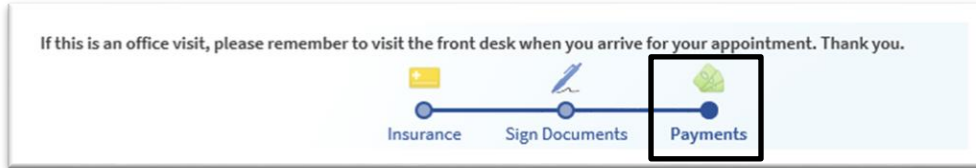


- Personal Information
- Insurance & Guarantor Information
- Medications
- Allergies
- Health Issues (Problems)
- Sign Documents (Joint Notice of Information Practices, Consents, Care Everywhere Prospective Authorization)

If your provider has assigned you a questionnaire to fill out, this will also populate within your Pre-Check in process.



If your insurance requires a Copay for the specific appointment type, you may be prompted as part of the PreCheck-In or as a separate step on the appointment details.



If your insurance requires a co-pay, your credit card will not be charged until the time of your video visit.

Please select the amounts you wish to pay below. If you are unable to pay now, you can pay later.

Payment for This Visit

Copay

\$20.00 (Amount due)

Pay copay later

✓ Your payment has been authorized successfully!  
Your credit card will be charged when you check in for the appointment.

Date: 5/28/2020  
Authorization code:

Payment amount  
\$20.00  
\$20.00 Copay

Payment method  
VISA Visa x07119 exp. 12/2022

At the bottom of each component screen, you must CONFIRM the information by selecting the checkbox to the left of **This information is correct** and selecting **NEXT**. If you do not have time to complete the PreCheck-in, you can select **Finish Later** but it must be complete at least 30 minutes before the appointment time.

This information is correct

NEXT FINISH LATER

This information is correct

NEXT FINISH LATER



On the Personal Information component, you can update your personal information. This information will automatically update your medical record for UMass Memorial. To Update the information, select **Edit**.



PreCheck-In Finish Later

### Verify Your Personal Information

**Contact Information**

20 Crestwood Road  
MANCHAUG MA 01526

Going somewhere for a while? [Add a Temporary Address](#)

774-555-2232  
508-654-2323  
Not entered  
eileen.yanchevski@umassmemorial.org

**EDIT**

**Details About Me**

Preferred Name Not entered	Gender Identity Not entered
Sex Assigned at Birth Not entered	Sexual Orientation Not entered
Marital Status Divorced	Race Black or African American
Ethnicity Not Hispanic or Latino	Ethnic Background African American
Language English	

**EDIT**

This information is correct

On the Insurance component of PreCheck-In, you will need to confirm the person responsible for payment (this is you unless you are under 18).

**Responsibility for Payment**

Mychart, Precheckkone  
78 Justok Rd  
SHREWSBURY MA 01545  
508-842-5412

\*We have this person on file to pay for costs not covered by insurance. Is this information correct?

Yes  No

You can also update your insurance and add a picture of your insurance card (front & back). This will eliminate the need to provide it when you arrive at your appointment.

**Insurance on File**

BCBS  
Bcbs Ma Hmo/pos

Subscriber Name  
Mychart,  
Precheckkone

Subscriber Number  
xxxxxxxxxxxx

**ADD INSURANCE CARD PHOTOS**

Uploading images of your card now will help speed up the check-in process for your next visit.

[Update coverage](#)

[Remove coverage](#)

**Insurance on File**

BCBS  
Bcbs Ma Hmo/pos

Subscriber Name  
Mychart,  
Precheckkone

Subscriber Number  
xxxxxxxxxxxx

[Update coverage](#)

[Replace insurance card photos](#)

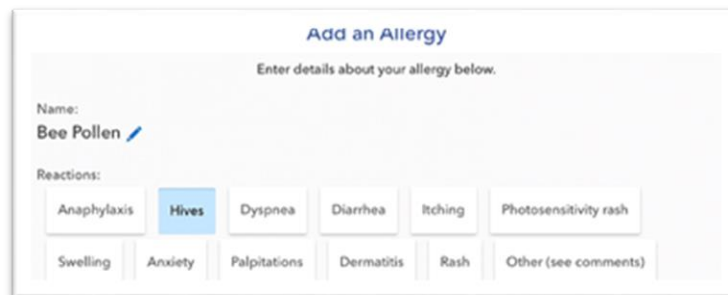
[Remove coverage](#)

Next Step is your **Medications**. You can Request Additions or Removals of any current medications you are taking. Be sure to discuss with your provider during the appointment to assure that s/he reconciles your medications with you.

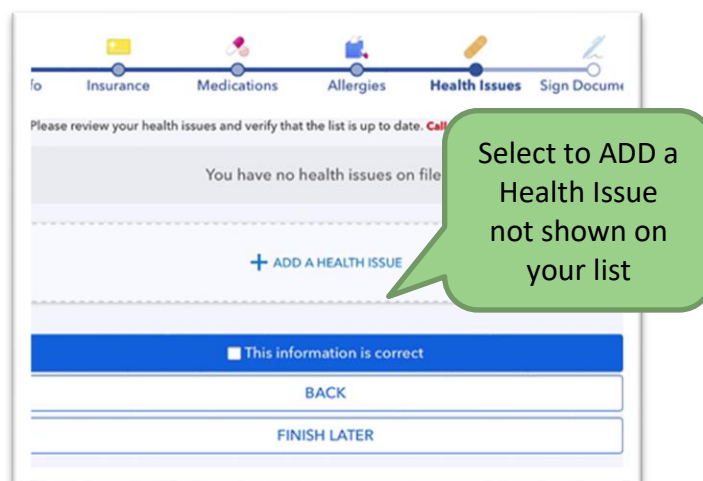
You can also enter your preferred pharmacy here for any medications which may be prescribed. Enter your zip code and the pharmacies in your area will appear. Pick your pharmacy and add it to your profile.



**Allergies** are next. You can Request Additions or Removals in the same fashion as in the medications section, but note you should also discuss with your provider. If you do choose to add, you will need to enter details about the allergy.



The last clinical item is **Health Issues** (sometimes called problems). You can Request Adds or Removals here as well, but again be sure to discuss with your provider during the visits. Keep in mind that these are ongoing health issues, not past history.



If you have been assigned a questionnaire, completing it during PreCheck-In allows you more time to answer the questions. You will be walked through questions and should answer each/any as they apply.

**Patient Medical History**

Step 1 of 4  
Please fill out the following questionnaire. When available, data is pulled from your chart.

**Medical History**  
Have you had or do you currently have any of the following conditions? Please check all that apply.

Question	Date first noted (approx)
<input type="checkbox"/> Anemia	
<input type="checkbox"/> Diabetes	

Lastly, you will be asked to electronically Sign a few documents. Although you can choose to Review Later, we encourage you to do so during PreCheck-In to save time and steps post your arrival at the appointment. Which documents appear will vary.

<b>HIPAA Notice of Information Practices</b> Not Signed Yet REVIEW LATER REVIEW AND SIGN	<b>Hospital Consent and ROI</b> Not Signed Yet REVIEW LATER REVIEW AND SIGN
<b>Physician Consent and ROI</b> Not Signed Yet REVIEW LATER REVIEW AND SIGN	<b>CE Prospective Authorization</b> Not Signed Yet REVIEW LATER REVIEW AND SIGN

When you select **Review and Sign**, you will need to scroll down to e-sign with your finger or stylus in the designated areas.

**Physician Consent and ROI**

UMass Memorial Health

PHYSICIAN GEI

Name: Larry Mychart  
Address: 123 Main Street  
Grafton MA 01519

This agreement is a general consent for treatment and services that may be provided by the UMass Memorial Health Care (UMass Memorial) entity

I have reviewed this agreement and I understand its contents. I understand that I can request an explanation for any questions that I have. I consent to the above terms myself or on behalf of the patient's Authorized Representative.

*Signature of Patient or Authorized Representative*

Patient/Representative Name:  
Relationship to Patient:

\*For treatment purposes for all patients: Authorized Representative

Verizon 2:01 PM 63%

PreCheck-In Finish Later

Please review and address the following documents. There may be additional documents to sign at the clinic.

**Physician Consent and ROI**  
Signed on 5/28/2020

REVIEW

Once this step is completed, documents will be submitted for clinic review.

NEXT


When PreCheck-In is complete, you will receive a thank you message. Since this is a Video Visit and not an Office Visit, you will not need to visit the front desk:


Thanks for Using PreCheck-In!  
If this is an office visit, please remember to visit the front desk when you arrive for your appointment. Thank you.  
The information you've submitted is now on file.


# It's Time for your Video Visit

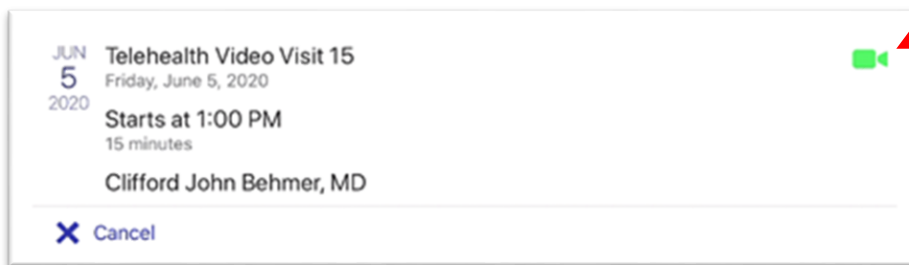
Approximately 15 minutes before your appointment, you will receive a call from a staff member from your scheduled provider's office. During this call, they will:

- Confirm the reason for your video visit.
- Verify that you have completed the Technical Setup on your personal device.
- Verify that you completed the PreCheck-In.
- Inform you of what happens if you are disconnected. They will call you or you can try reconnecting yourself – do NOT call the office.
- Answer any questions.
- Have you BEGIN your video visit, where you will wait in a sort of waiting room for the provider to join.

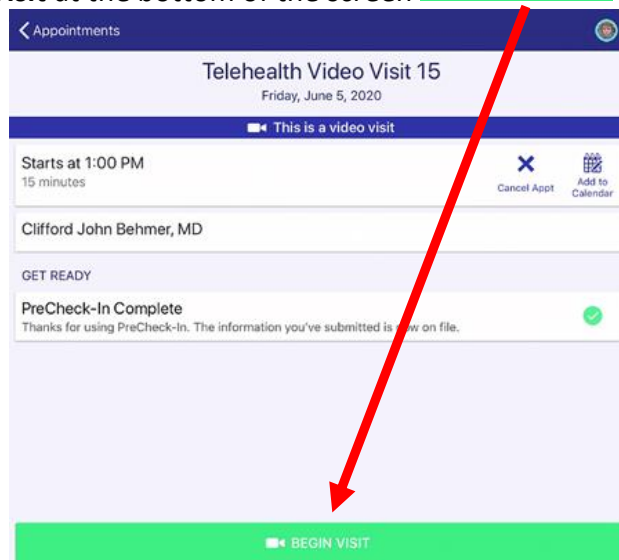
1. Log into your MyChart App 

2. Select the Calendar icon to access your upcoming Visits 

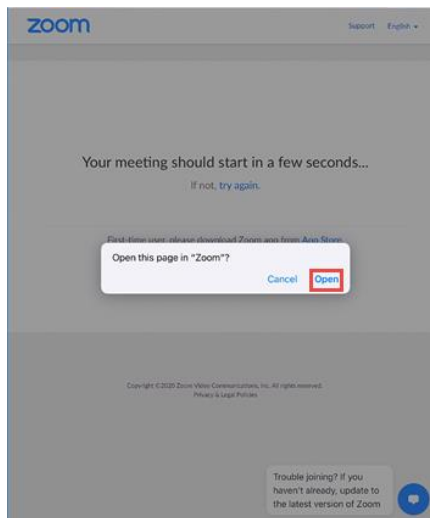
3. Your appointment will be at the top of the schedule. Select the small Green Camera 



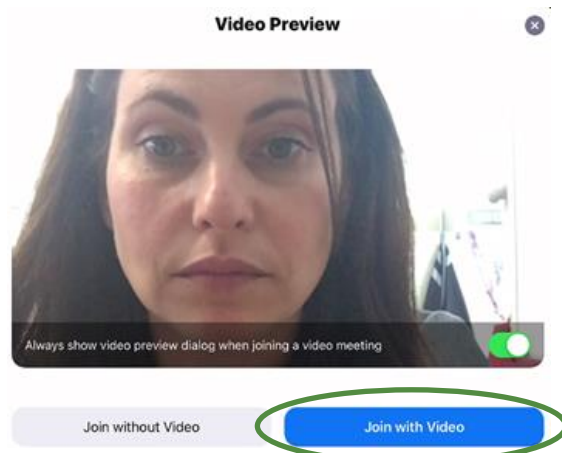
4. Select **Begin Visit** at the bottom of the screen 



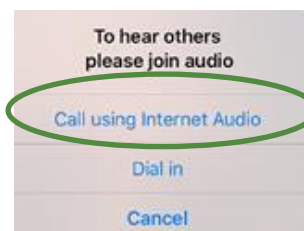
5. After selecting **Begin Visit**, you will be connected to the ZOOM application – Select **Open** when prompted to **Open the page in ZOOM?**



6. After selecting **Open**, you will see a Video Preview of yourself – Select **Join with Video**.

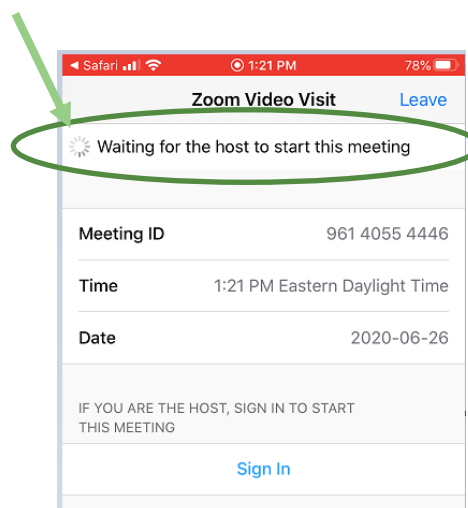


7. Select **Call using Internet Audio** and remember to use your earbuds or headphones for best sound quality.

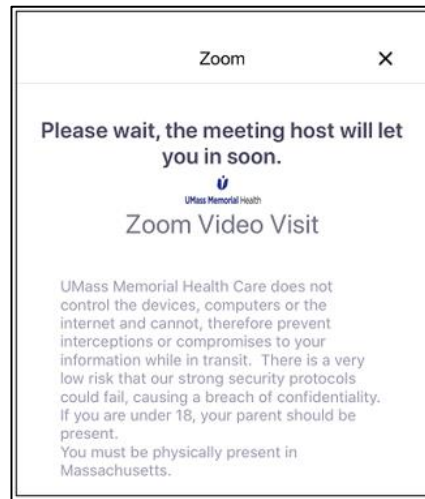


8. You will be placed in a ZOOM pre-waiting room while you wait for your provider to join you.

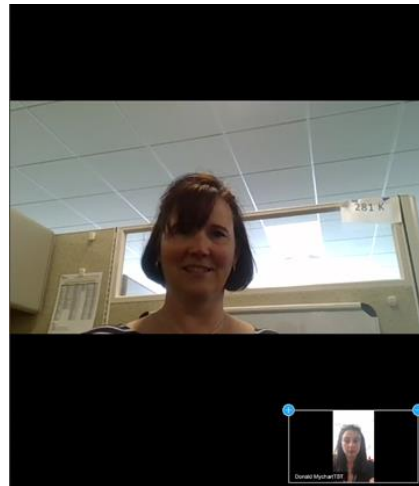
Do NOT worry that you see the circle spinning – it's just a waiting mode.



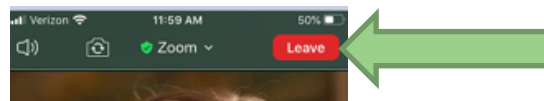
9. Once the provider joins on his/her end, you will be switched to the ZOOM waiting room until the provider admits you into ZOOM.



10. When the Provider Joins, you will see yourself and the Provider in 2 different windows on your screen.



11. After completing the Video Visit with your provider, you will **Leave** the meeting.



Later that day or the next day, the provider will complete the documentation for the visit. You will then be able to review your After-Visit Summary, found on the respective PAST appointment in the Visits tab

