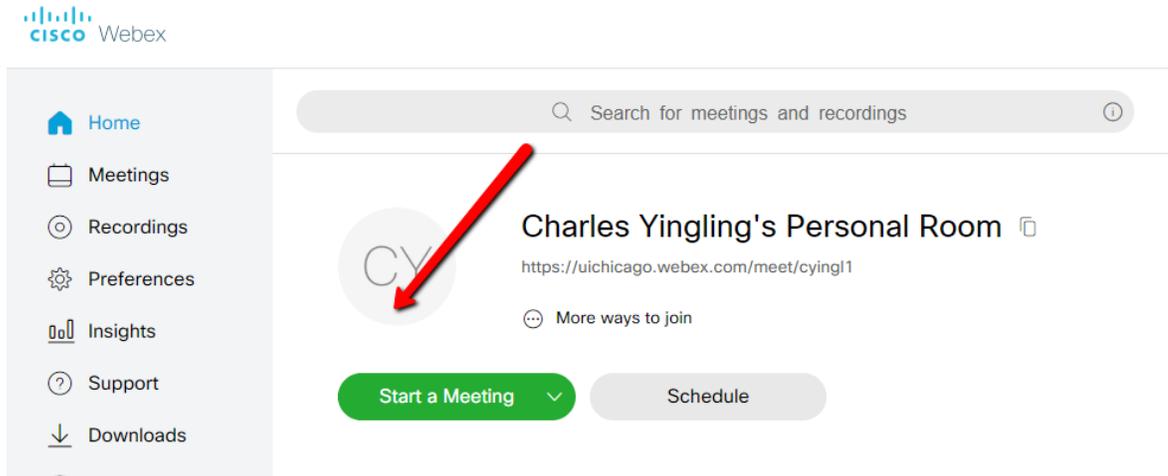




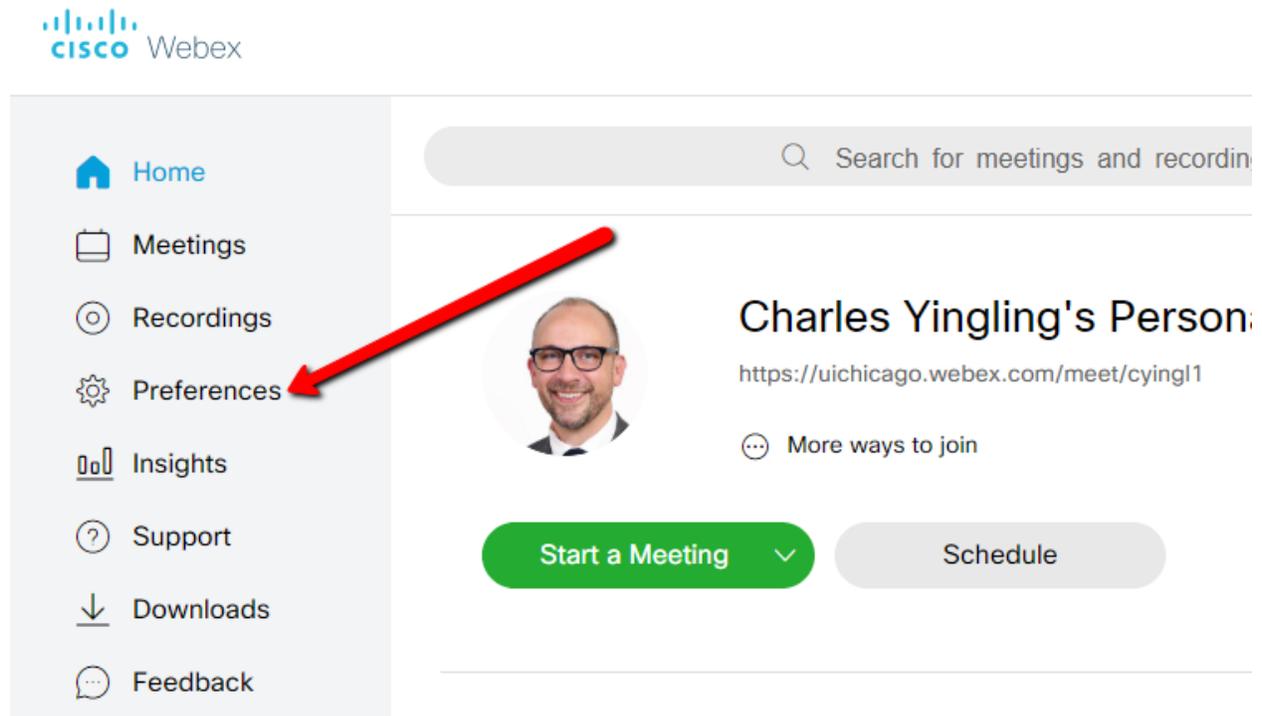
Using WebEx for Telehealth

First-time user setup:

1. Navigate to: <http://uichicago.webex.com/>
2. At the top right of the screen, click "Sign In"
3. Enter username and password
4. I recommend adding a profile picture by clicking on the circle with your initials:



5. Now, you will delegate scheduling access to individuals who will be able to schedule telehealth encounters on your behalf (e.g. MA, CSR). Navigate to Preferences





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6. Click Scheduling

Preferences

General My Personal Room Audio and Video **Scheduling** Recording

Time zone (UTC-05:00) Central Time (US & Canada) ▾

Language English ▾

Region United States ▾

7. Select *Webex Meetings Pro 1000*
(Webex Locked Presenter locks the view on just the host (e.g. at a webinar where you want all of the people seeing just one person))

- 8.

General My Personal Room Audio and Video **Scheduling** Recording

Meeting type ⓘ Webex Meetings Locked presenter ^

Email invitation Webex Meetings Locked presenter

Share recording ⓘ Webex Meetings Pro 1000 meeting

Scheduling permission ⓘ WebEx Personal Conference

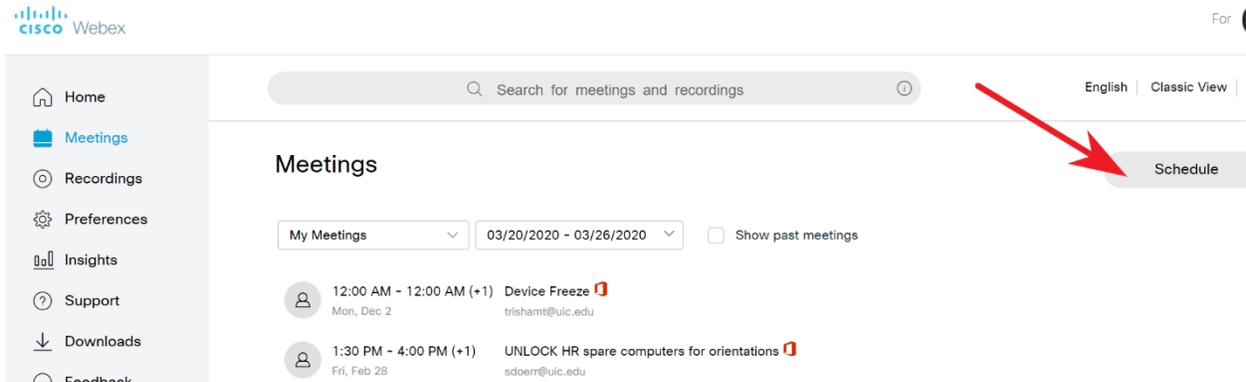
<Separate email addresses with a comma or semicolon>

9. In this same area, check the box that says “Send a copy of the email invitation to me”. This will assure that you have a backup copy of the link for the appointment.
10. In the *Scheduling Permission* box, list all of the people who should be able to schedule appointments on your behalf.

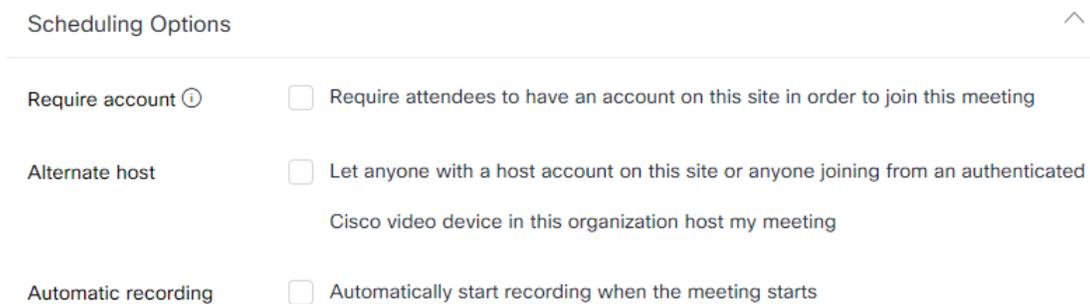
Note: The people you setup with scheduling permissions need to have their own Webex accounts (start with Step 1 above for them).

11. Be sure to click the Save button at the bottom of this screen

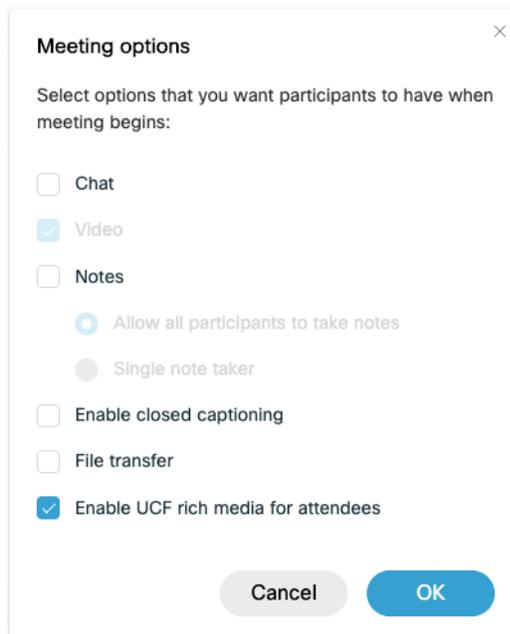
12. When scheduling your appointment go to Meetings tab on the left side and choose “Schedule” button on the right side of screen. Click “Show Advanced Options”



13. Make sure you do not record your session – the automatic recording option under Scheduling Options has to be “un-checked”.



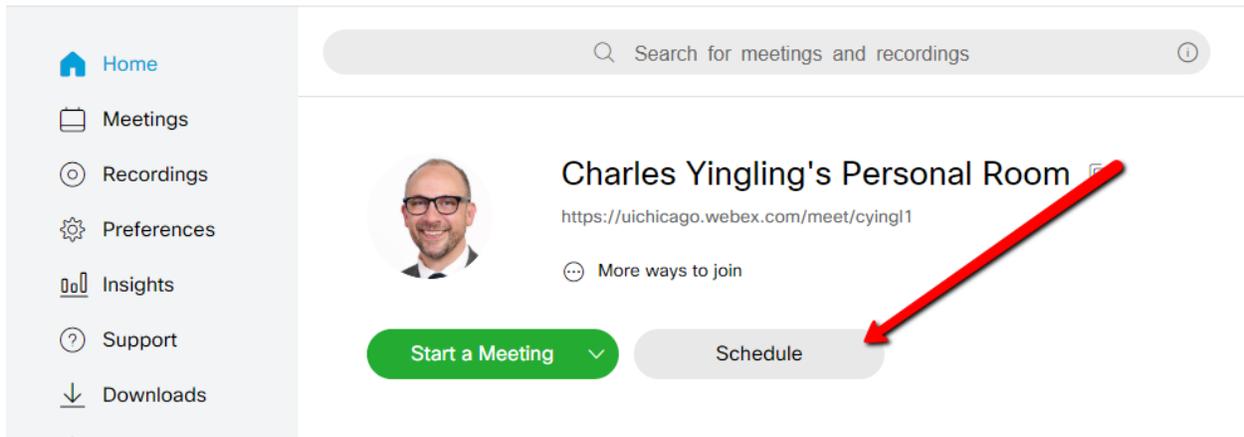
14. Click “Edit meeting options” at the bottom and uncheck as below





Scheduling a telehealth visit for your own patient (i.e. Provider Workflow):

1. From the home screen, click “Schedule”
(The “Schedule Meeting” option creates a one-time link that can be used by a single patient. Do not use “My Personal Room” option as this is a stable meeting link that can be used again and again and previous patient could inadvertently walk in on a current patient)



2. Change the meeting type to “Webex Meetings Pro 1000”
(Webex Locked Presenter locks the view on just the host (e.g. at a webinar where you want all of the people seeing just one person))

Schedule a Meeting

Meeting templates Webex Meetings Default

Meeting type Webex Meetings Locked presenter

* Meeting topic Webex Meetings Locked presenter

* Meeting password Webex Meetings Pro 1000

Date and time Tuesday, Mar 17, 2020 11:35 am Duration: 1 hour

(UTC-05:00) Central Time (US & Canada)

The screenshot shows the 'Schedule a Meeting' form. The 'Meeting type' dropdown is open, showing options: 'Webex Meetings Locked presenter', 'Webex Meetings Pro 1000', and 'WebEx Personal Conference'. A red arrow points to 'Webex Meetings Pro 1000'. The 'Meeting topic' field contains 'Webex Meetings Locked presenter'. The 'Meeting password' field is empty. The 'Date and time' field shows 'Tuesday, Mar 17, 2020 11:35 am' and 'Duration: 1 hour'. The time zone is '(UTC-05:00) Central Time (US & Canada)'.



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3. For the Meeting Topic, enter text here that would be understandable to the patient (e.g. "UIC Clinic Telehealth – Patient :") as this will be included in the message the patient receives.

(NOTE: The recipient will receive an email from your personal UIC email account with the meeting link)

The screenshot shows the 'Schedule a Meeting' page in the Cisco Webex interface. The page title is 'Schedule a Meeting' and the meeting template is set to 'Webex Meetings Default'. The form contains the following fields and options:

- Meeting type:** Webex Meetings Pro 1000
- Meeting topic:** UIC Clinic Telehealth - Patient:
- Meeting password:** 4zR4mMMqKm6
- Date and time:** Thursday, Mar 19, 2020 12:15 pm. Duration: 1 hour. Time zone: (UTC-05:00) Central Time (US & Canada).
- Recurrence:** A checkbox that is currently unchecked.
- Attendees:** A text input field with the placeholder 'Separate email addresses with a comma or semicolon'.
- Show advanced options:** A dropdown arrow.
- Buttons:** 'Cancel', 'Start', and 'Save as template'.

At the bottom of the page, there is a copyright notice: © 2020 Cisco and/or its affiliates. All rights reserved. [Privacy Statement](#) | [Terms of Service](#)

4. If you will be scheduling regularly, you may find it helpful to click "Save as Template" so these settings will be stored for the future.

The 'Save as template' dialog box is shown. It has a title bar with a close button (X). The main content includes:

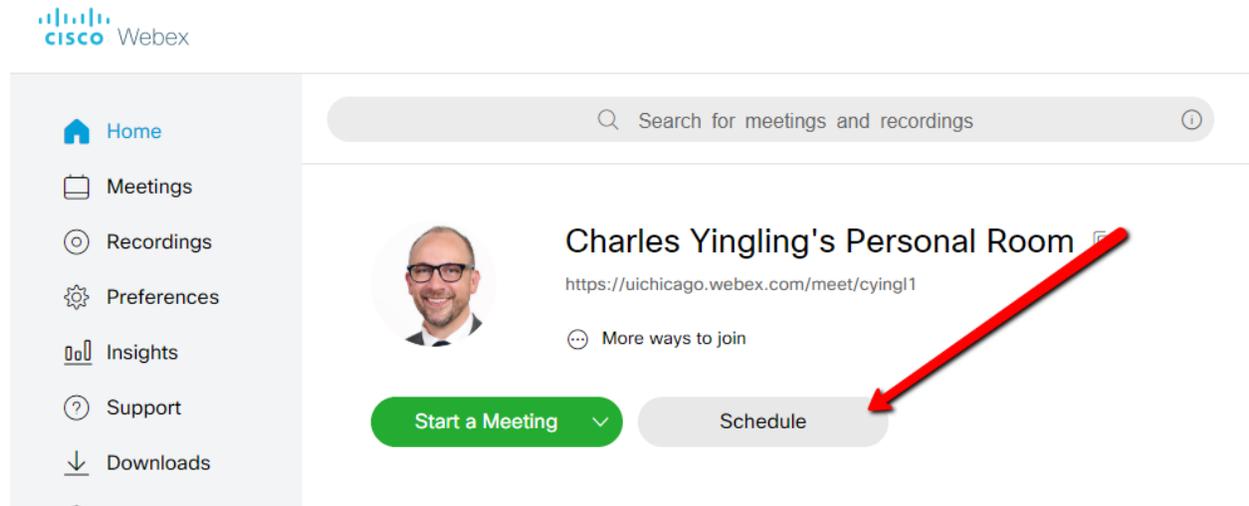
- A text input field containing 'UIC Clinic Telehealth'.
- A yellow warning box with a triangle icon and the text: 'Save your current scheduling settings to use as a template for future meetings. Recurrence settings are not included when you save a template.'
- A section titled 'My templates' with a light blue bar containing 'UIC Clinic Telehealth'.
- Buttons for 'Cancel' and 'OK' at the bottom.

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5. Assign a date, time and duration. I recommend setting the start time to 5 minutes prior to the intended start time.
6. Enter the patient's email address in the "Attendees" box
7. Click "Schedule". An email will be sent to the patient with the link and password.

Scheduling a telehealth visit for someone else's patient (i.e. MA/CSR Workflow):

1. From the home screen, click "Schedule"
(The "Schedule Meeting" option creates a one-time link that can be used by a single patient. Do not use "My Personal Room" option as this is a stable meeting link that can be used again and again and previous patient could inadvertently walk in on a current patient)



2. Select the provider for whom you are scheduling the appointment. (Note – that provider must have delegated schedule access to you. See above for those instructions)

Schedule a Meeting Meeting templates

Schedule for	Myself 
Meeting type	<input type="text" value="Webex Meetings Pro 1000"/>
* Meeting topic	<input type="text"/>
* Meeting password	<input type="text" value="JrxcXc43Mn7"/>
Date and time	Tuesday, Mar 17, 2020 2:45 pm Duration: 1 hour (UTC-05:00) Central Time (US & Canada)
	<input type="checkbox"/> Recurrence

A red arrow points to the dropdown arrow next to 'Myself' in the 'Schedule for' field.



3. Set the meeting type to “Webex Meetings Pro 1000”
(Webex Locked Presenter locks the view on just the host (e.g. at a webinar where you want all of the people seeing just one person))

Schedule a Meeting

Meeting templates

Webex Meetings Default

Meeting type

Webex Meetings Locked presenter

* Meeting topic

Webex Meetings Locked presenter

* Meeting password

Webex Meetings Pro 1000

WebEx Personal Conference

Date and time

Tuesday, Mar 17, 2020 11:35 am Duration: 1 hour

(UTC-05:00) Central Time (US & Canada)

4. For the Meeting Topic, enter text here that would be understandable to the patient (e.g. “UIC Clinic Telehealth – Patient:”) as this will be included in the message the patient receives.

(NOTE: The recipient will receive an email from your personal UIC email account with the meeting link)

The screenshot shows the 'Schedule a Meeting' interface in the Webex application. The meeting type is set to 'Webex Meetings Pro 1000'. The meeting topic is 'UIC Clinic Telehealth - Patient:'. The meeting password is '4zR4nMMqKm6'. The date and time is 'Thursday, Mar 19, 2020 12:15 pm' with a duration of '1 hour'. There are 'Cancel', 'Start', and 'Save as template' buttons at the bottom.

5. If you will be scheduling for this provider regularly, you may find it helpful to click “Save as Template” so these settings will be stored for the future.



Save as template

UIC Clinic Telehealth

⚠ Save your current scheduling settings to use as a template for future meetings. Recurrence settings are not included when you save a template.

My templates

UIC Clinic Telehealth

Cancel OK

6. Assign a date, time and duration. I recommend setting the start time to 5 minutes prior to the intended start time.
7. Enter the patient's email address in the "Attendees" box
8. Click Scheduling Options to show the drop down menu. Check the box to let alternate hosts open the telehealth encounter. Doing this enables another provider to see the patient in the event the scheduled provider is not available.

Scheduling Options

Require account Require attendees to have an account on this site in order to join this meeting

Alternate host Let anyone with a host account on this site or anyone joining from an authenticated Cisco video device in this organization host my meeting

Automatic recording Automatically start recording when the meeting starts

Exclude password Exclude password from email invitation

Registration None Require attendee registration

Email reminder 15 minutes before meeting starts

Click "Schedule". An email will be sent to the patient with the link and password.



Conducting the Telehealth Encounter:

1. When the patient clicks the link to join the meeting, they will either be prompted to install the Webex app on their phone or download the plug-in for their browser. It will be helpful for patients to do this in advance of the scheduled appointment.
2. The provider will need to do the same. Please be mindful of this if working on a different computer in the clinic.
3. Conduct the telehealth encounter as described above.