

Visit Preparation

- ❑ Watch Provider Training Video
ottohealth.com/nextgen-training-materials-*t85B3K4qAEi
- ❑ Utilize Test My Device feature:
connect.ottohealth.com/video/test
- ❑ Review Devices & Connection Guide:
See page 3
- ❑ Ensure camera & microphone are ready:
ottohealth.com/techsupport

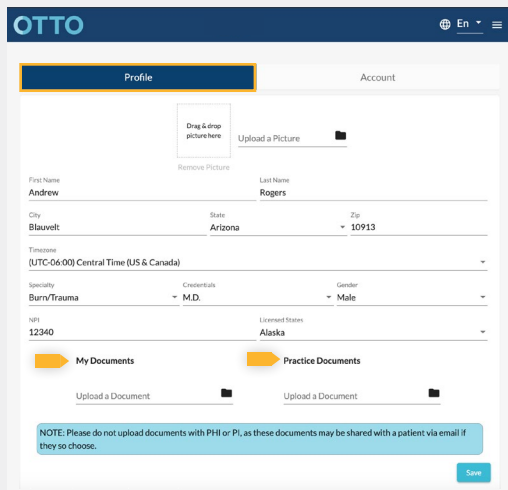


To view more training videos, feature demonstrations and additional user guides, visit:

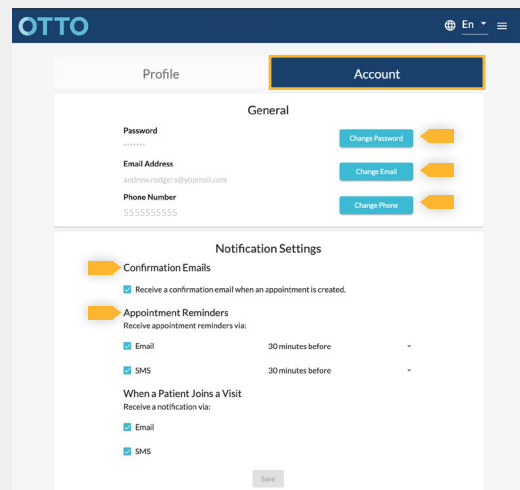
ottohealth.com/nextgen-training-materials-*t85B3K4qAEi

Provider Profile Setup

These steps are optional and allow you to customize notifications and share documents.



- ❑ To confirm profile and account details: click then click Profile.



In-Visit Features



CHAT: You and your patient can use chat messages to exchange information such as medical phrases/terms, helpful website links, and more.



DOCUMENT PASSING: Share documents with your patient, such as education materials. You can upload documents on-the-fly, save frequently used documents in your OTTO Profile for easy retrieval, or choose from the library shared across your practice. Patients can download the documents during the visit and/or get them in an email following the visit.



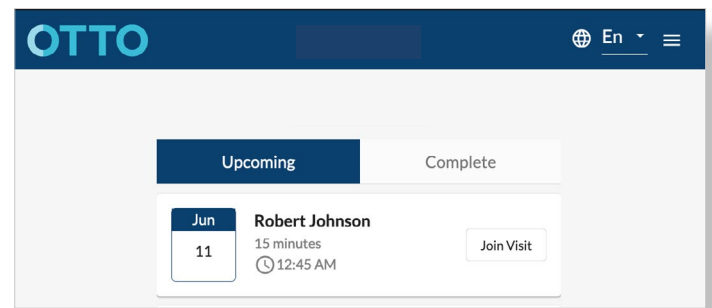
SCREEN SHARING: Share content from your computer screen with your patient to jointly review information, such as EHR documentation or lab results. Screen sharing is ONLY available on **Google Chrome** and **Firefox** browsers when you attend your Virtual Visit on a computer. All mobile devices and Safari do NOT support screen sharing at this time.





Use these icons to turn your camera and microphone ON/OFF

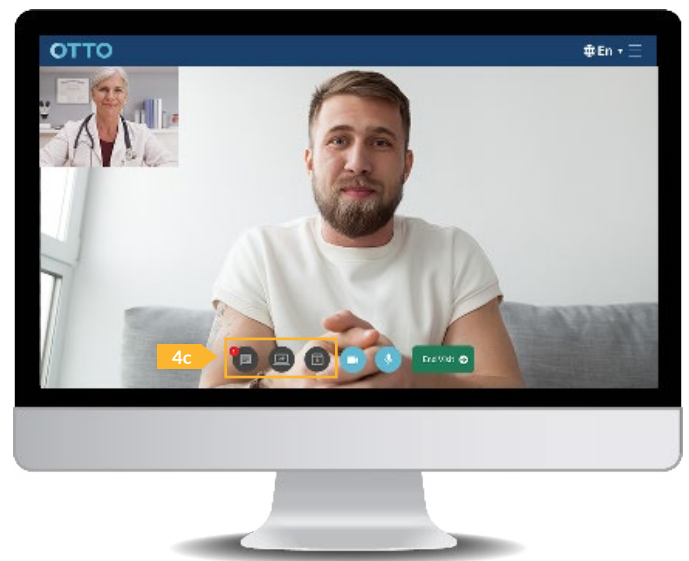
Conducting Your Virtual Visit

1. While in your EHR inbox, locate your patient's Virtual Visit.
2. When your patient has joined the Virtual Visit, the appointment will be marked **Kept** in NextGen.
3. Navigate to connect.ottohealth.com and log in.
4. Click **Join Visit** to see your patient.
 - a. To view patient intake responses before the visit, click **View Intake** in OTTO.
 - b. While in the visit, you will see the state where the patient is located next to the patient's name and date of birth*.
 - c. Use chat, document passing and screen sharing, by clicking the corresponding icon at the bottom of the screen.
 - d. You can document alongside your Virtual Visit in your EHR as you would normally.
5. Be sure to click **End Visit** when you are finished.
 - a. If prompted, review patient payment amount, and click **Yes** to continue processing payment.
6. The encounter will be **Checked Out** in your PM system. Complete charting in your EHR to finalize the encounter.
 - a. To locate the time spent in visit, copy of your chat transcript and patient intake questions, click on the encounter folder titled **Virtual Visit** in the patient's chart.



If you are using OTTO Clinical Admin Users at your practice, you may notice some additional icons on your **Upcoming Visits**. You can hover over the icons for more information.

- Join Visit** Indicates Patient is *active* in the visit.
-  Indicates another practice user is *active* in the visit.
-  Indicates another practice user *has been* in the visit and left.



* Use this information to confirm the patient's location is in accordance with your medical license and/or billing regulations

COMPUTER/
LAPTOP

- Update your browser to the **most recent version**.
- *Please note: Internet Explorer and Microsoft Edge are NOT supported.*

GOOGLE CHROME

FIREFOX

SAFARI

ANDROID

- Update your device to the most recent operating system (**version 8 or later**).

GOOGLE CHROME

IPHONE/IPAD

- Make sure you are using an **iPhone 6, or later**.
- Update your device to the most recent operating system (**version 11 or later**).

SAFARI

INTERNET & WIFI

- We recommend using a secure and private internet connection (or cellular service on your mobile device). If you are in a corporate office, firewalls often block the video connection. Turn off WiFi and refresh your page on a cellular device, or try another secure WiFi network on your computer.

TO JOIN VIST

- Provider login: connect.ottohealth.com.
- Patients join via emailed or texted link.
- **No app needed.**

AUDIO & VIDEO

- Device must have **front-facing camera**.
- Allow browser access to **camera and microphone**.
- Earphones **must have a microphone**.
- Turn device volume up.

NEED HELP?

- Run a quick test prior to your Virtual Vist: connect.ottohealth.com/video/test
- Visit the tech support page: ottohealth.com/techsupport