



# **ViRTUAL GP Kit**

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**3 - SETUP GUIDE**

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Setup for your virtual clinic is fast, simple, and free. You should be able to complete this setup in 15-30 minutes.

## Step 1: Set up camera

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Doxy.me is the video conferencing solution designed especially for GPs. It works on mobile devices or laptops with most integrated cameras, and using external web cams. You should test your device against the minimum system requirements. The details are [here](#)

## Step 2: Prepare your computer for Doxy.me

Doxy.me isn't an application that you have to install on your computer. It runs via your web browser. Doxy.me works with Chrome, Firefox, and Safari (Mac OS only). Internet Explorer is not supported.

Make sure you are running an up-to-date version of one of these three compatible web browsers.

**You only need to complete the update step for the browser you are using. Of course, you can skip the 'install Chrome' step if you are already using Firefox or Safari.**

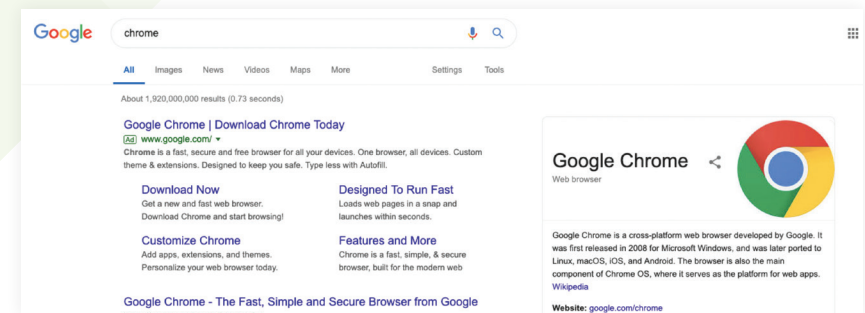


Doxy.me can also be used on a mobile device. On Android you'll need to use Chrome, and on an Apple mobile device (iPhone or iPad) you'll need to use Safari. Details [here](#)

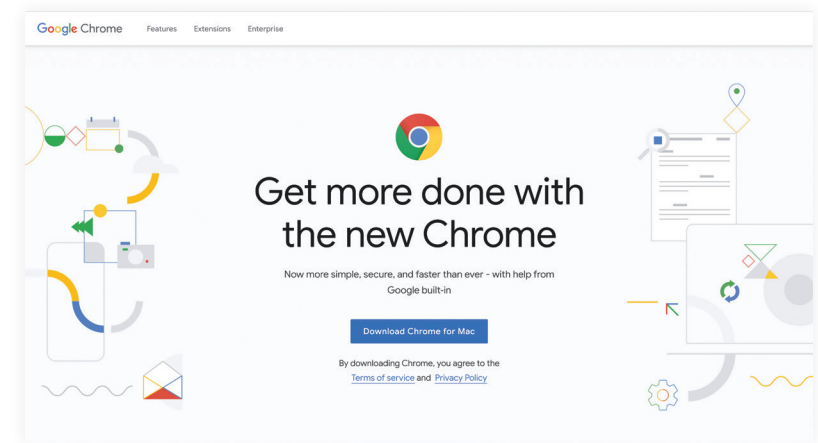
## 2.1 Install Chrome web browser if you don't have it

*(You only need to do this step if you are running Microsoft Windows and still using Internet Explorer).*

Head on over to [www.google.com](http://www.google.com) and type in 'Chrome'. Click the first link for 'Google Chrome | Download Chrome today'.



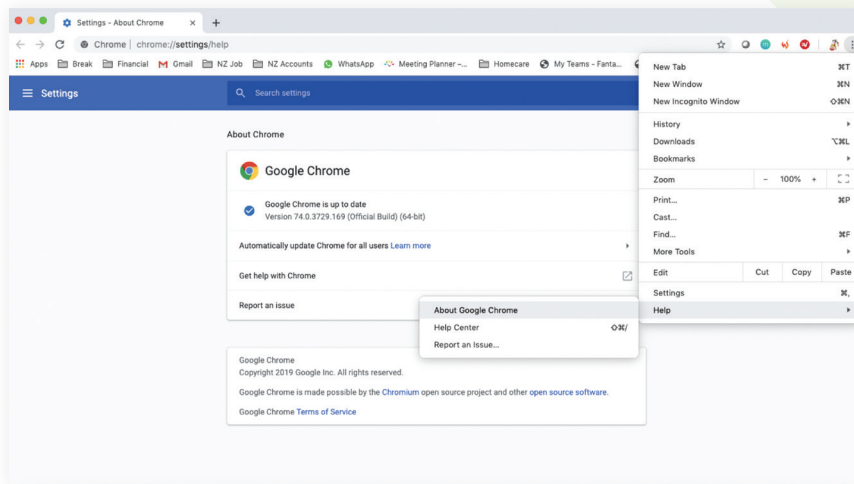
Click the 'Download Chrome' button and follow the on-screen instructions to complete the installation.



## 2.2 Is Chrome up to date?

*(You only need to do this step if you are using Google Chrome as your web browser).*

Open Chrome on your computer. In the top right, click on the 'More' menu, which is the three vertical dots icon all the way to the right of the menu bar.



Go to Help > About > About Google Chrome. You are looking for the message in the center of the screen that says, "Google Chrome is up to date."

If you need to update Chrome, the screen will direct you on what steps to take.

## 2.3 Is Firefox up to date?

*(You only need to do this step if you are using Mozilla Firefox as your web browser).*

Open Firefox on your computer. In the Firefox menu, found on the top left, select About Firefox. You should see a new window pop up and you are looking for the line that says, "Firefox is up to date."

If the application is not up to date, there will be a link to guide you to download the most recent version. Follow the on-screen instructions.



## 2.4 Is Safari up to date?

*You only need to do this step if you are using Safari as your web browser.)*

Open Safari on your Mac. You must be running Safari 11+.

To check if your Mac is updated, click on the Apple icon in the top left corner of the desktop. Select “About this Mac” (also called ‘System Information’).

In the pop-up window, click the button for “Software Update”. The system will check to determine if your OS is up to date. If it is not, follow the on-screen instructions to update.



## Step 3: Register for and set up Doxy.me

Doxy.me is easy to register for and set up. Most importantly, it is FREE to get started.

You do not need to worry about which version you sign up for at the start. All accounts start as the free version and you can upgrade at a later time when you feel comfortable.

### 3.1 Create a Doxy.me account

Open your web browser (Chrome/Firefox/Safari) on your computer, mobile device or smartphone. Head to the web address: <https://doxy.me/sign-up>. You will need to fill out the form with the information for your provider and practice.

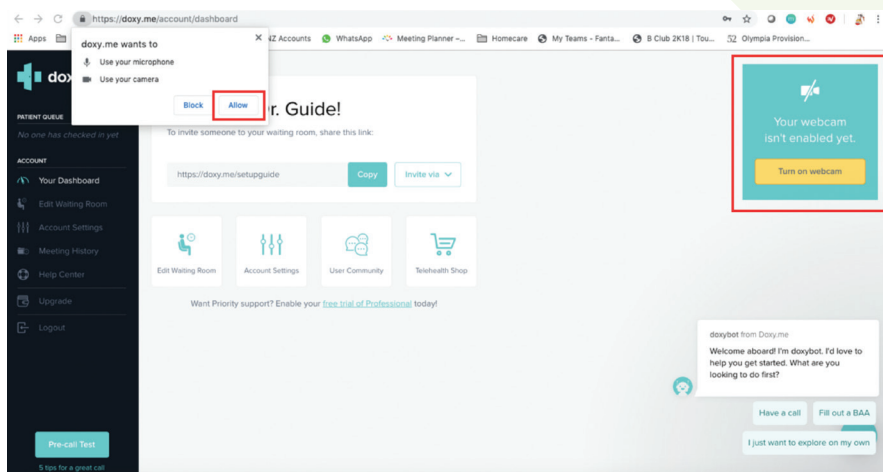
A screenshot of the Doxy.me sign-up form. The form is titled 'Sign Up' and includes the following fields and annotations:

- Dr.** (dropdown menu): Annotated with 'Name of the provider who will be conducting the virtual visits'.
- First Name** (text field): No annotation.
- Last Name** (text field): No annotation.
- Room Name (e.g. DrWeich)** (text field): Annotated with 'This is the name that appears in the web address patients will use. Choose something short and simple, but that still identifies you or your practice. https://homecare.doxy.me/hcmvirtualclinic'.
- Email** (text field): Annotated with 'E-mail address for you or your practice. You will use this e-mail to login to the account.'
- Password** (text field): Annotated with 'Admin password for your virtual clinic. Only for clinic users.'
- Checkboxes:** Two checkboxes at the bottom: 'I am using Doxy.me as a healthcare provider, not a patient' and 'I agree to the Terms and Conditions'.
- Sign Up** (button): A teal button at the bottom right.

Once you have filled out the information in the form, check the boxes to agree to the terms. We've reviewed these to ensure they are reasonable, but as always it is up to you to agree.

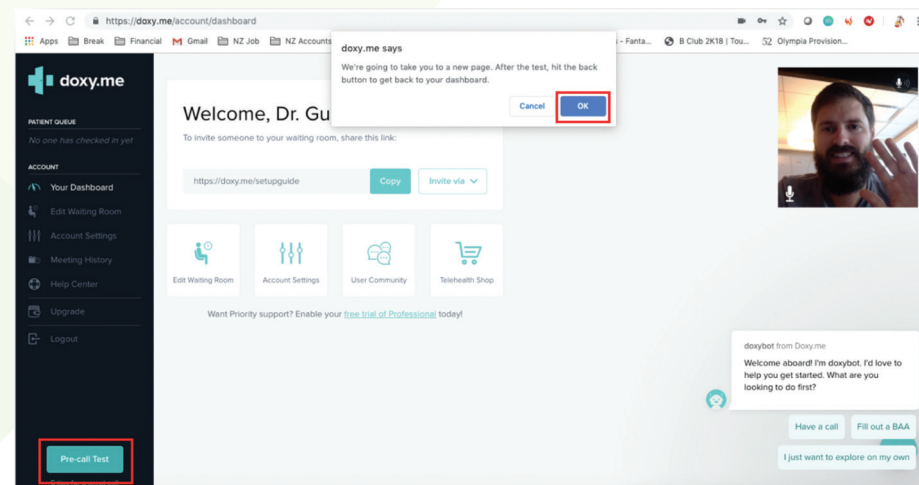
### 3.2 Set up Doxy.me

As a first step, you will get access for Doxy.me to use your camera. In the top right, click “Turn on webcam”. If prompted by your browser, allow access to both the microphone and the camera.



With the microphone and camera enabled, you should be able to see the camera feed in the top right of the screen.

Next, test your connection speed. Your patients will be able to do this as well. In the lower left corner, click “Pre-call Test” to begin. If prompted by your browser, click OK to proceed.



The test should take a minute or two to run. It should give you results to verify the camera and microphone are working, that you are using a compatible browser, and whether or not your connection speed will support adequate call quality.

If you have issues with your connection or connection speed, the system will provide suggestions to remedy.

## Pre-call Test


The test is complete! Select a category to quickly navigate to that section.

Hardware & Software Setup

Connectivity to OpenTok Servers

Expected Call Quality


### Hardware & Software Setup



#### Video

Move something in view of the camera to check that it is working.


FaceTime HD Camera



#### Audio

Say something in the microphone to check that it is working.





Default - Internal Microphone (Built-in)



#### Browser Compatibility

Chrome is supported by OpenTok.

### Connectivity to OpenTok Servers

 <div>API Server</div>	<h4>OpenTok API server - Connected</h4> <p>Connects to OpenTok and used for session initialization and signaling. Successfully connected to the OpenTok API server.</p>
 <div>Messaging WebSocket</div>	<h4>OpenTok Messaging WebSocket - Connected</h4> <p>Clients send and receive OpenTok session-related messages using this WebSocket. Successfully connected to the OpenTok Messaging WebSocket.</p>
 <div>Media Server</div>	<h4>OpenTok Media Server - Connected</h4> <p>Clients send audio and video to our media server for intelligent and efficient routing to their destination. Successfully connected to the OpenTok Media Server.</p>
 <div>Logging Server</div>	<h4>Logging Server - Connected</h4> <p>Our logging server collects anonymized data about quality and possible errors. Successfully connected to the OpenTok logging server.</p>


While the test is running, check the e-mail account you registered under for Doxy.me.

You should see a welcome e-mail. The e-mail will contain two hyperlinks: one for your clinic users and a second one that you can send to patients via SMS or e-mail reminders


Hi Test,

## Thanks for signing up!


To invite someone to your waiting room share your personalized Doxy.me room URL: <https://doxy.me/doctortest>. Click their name to start the call.




Email or text your link to your patients



Put your link in a calendar invite



Verbally tell your patient your link




Click Here for More Ideas

Check out our [Getting Started](#) tips.

We created a few [video tutorials](#) to help you learn about the Doxy.me platform. Be sure to check them out!

If you have any questions just reply here. We're here to help!

-Courtney



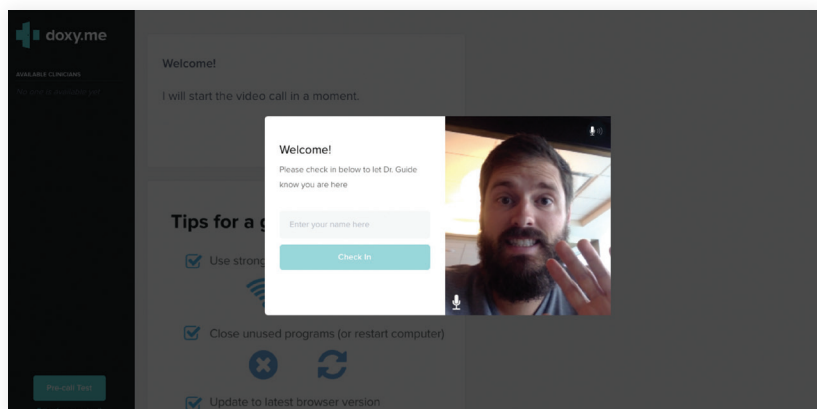
Courtney from Doxy.me



### 3.3 Do a test consult

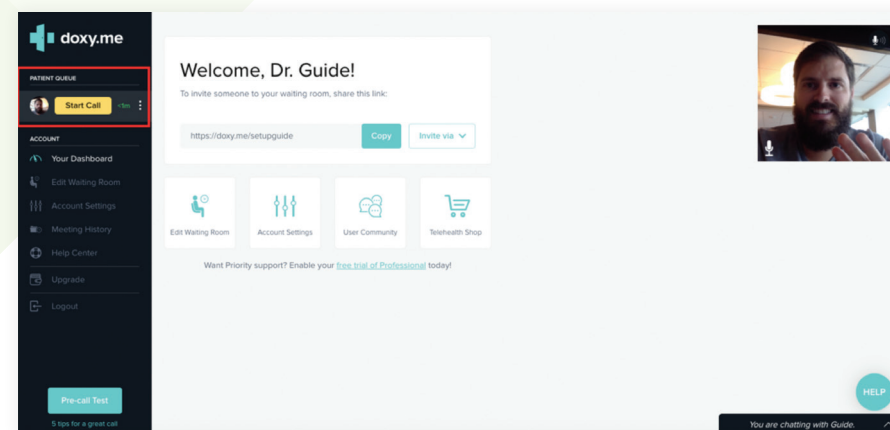
Next, let's complete a test virtual consult. This can be with anyone in the practice or even with yourself.

- On a different device (laptop, desktop, or phone), open the web browser and go to the link for patients found in your welcome e-mail. For patient experiences, remember that it will be easiest to send SMS and e-mail reminders with the link so that all they need to do is click.
- Once you enter the address and arrive at the virtual waiting room, you will be prompted to enter your name. You may need to grant access to the camera and microphone as you did previously in the setup.
- Click "Check-in" to enter the virtual waiting room. This waiting room is dedicated only to you/your clinic.



- Once you have checked in on the second device, go back to the device where you registered. This initial device should still be logged into the virtual waiting room from the provider view. Note the difference in the views. Also note that there is a new appearance in the patient queue in the upper left.

- With our test patient checked in, you can see their name and the number of minutes they have been waiting in the virtual waiting room. When you move the mouse over the patient, a yellow "Start Call" button will appear. Click it.



- With the call started, you will be connected with your test virtual consult on the second device. Check the video quality. Check the lighting for the provider side. Check the sound. Play around.
- Pull up your PMS system beside Doxy.me (Tip: many providers who regularly perform virtual consults find it helpful to use a second monitor).

**That's it. You've now set up your virtual clinic.**

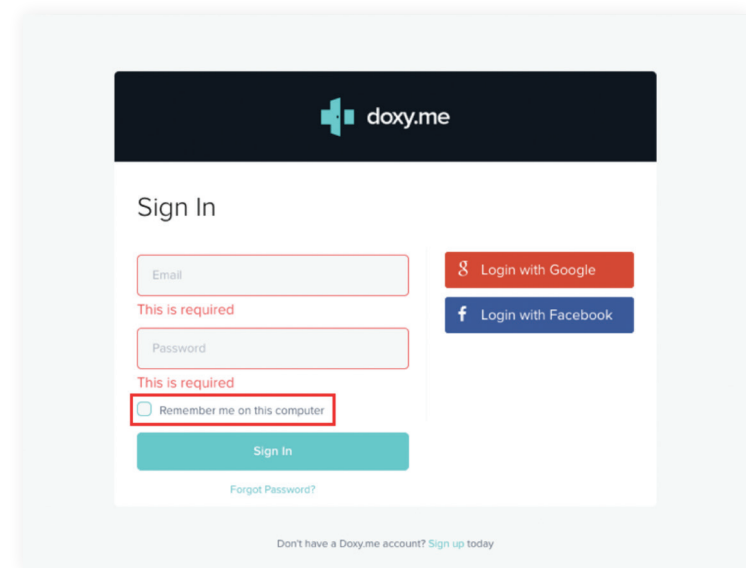
**For help** - go to [help.doxy.me](https://help.doxy.me) for tips on things like how to see your patients while you're also working in a separate browser tab or application.



### 3.4 Doxy.me optional steps

When you close the Doxy.me window in your web browser, you will be automatically logged out. You can use your e-mail address and password from above to login to the provider side of the virtual clinic on any computer or mobile device.

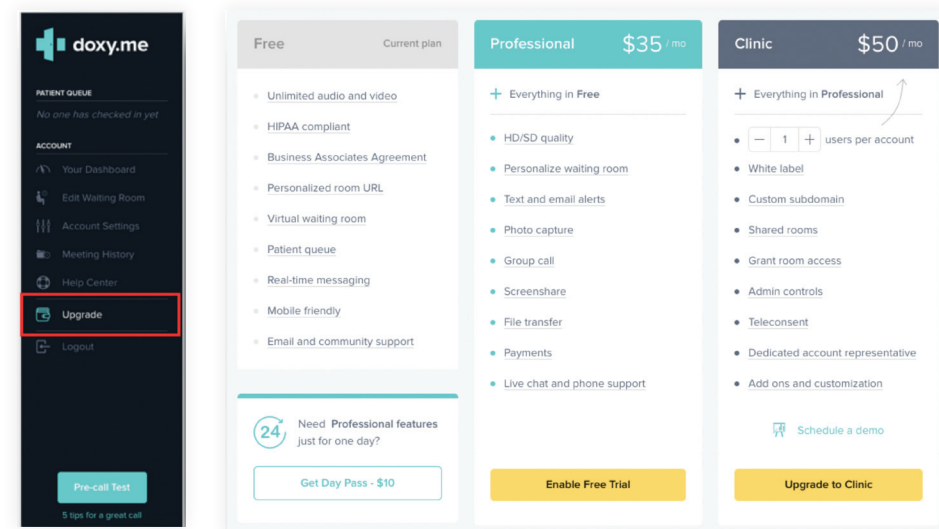
For convenience, if you plan to perform your virtual consults from a consistent workstation in the office or at home, you can remain logged in. Just tick the box when logging in. Once logged in, we recommend adding your virtual clinic as a bookmark in your web browser. One click and you'll be logged in and ready to begin a call with patients.



The image shows the Doxy.me Sign In interface. At the top is the Doxy.me logo. Below it, the text "Sign In" is displayed. There are two input fields: "Email" and "Password". Both fields have a red border and the text "This is required" below them. Below the Password field is a checkbox labeled "Remember me on this computer". To the right of the input fields are two buttons: "Login with Google" and "Login with Facebook". At the bottom of the form is a "Sign In" button. Below the "Sign In" button is a link that says "Forgot Password?". At the very bottom of the screen, there is a small text link: "Don't have a Doxy.me account? Sign up today".

When you sign up for Doxy.me, you are automatically registered for the FREE level. This is all you need to begin holding virtual consults. However, if the features in the Professional or Clinic levels (such as credit card payments) appear attractive to you, you may upgrade at any time.

To upgrade, simply select “Upgrade” from the menu on the left. You may select the version which best meets your needs, sign up, and follow the on-screen instructions.



The image shows the Doxy.me Upgrade screen. On the left is a dark sidebar menu with the Doxy.me logo at the top. Below the logo are sections: "PATIENT QUEUE" (with a sub-item "No one has checked in yet"), "ACCOUNT" (with sub-items: "Your Dashboard", "Edit Waiting Room", "Account Settings", "Meeting History", "Help Center"), and "Upgrade" (which is highlighted with a red box). At the bottom of the sidebar is a "Logout" button. The main content area shows three pricing plans: "Free" (Current plan), "Professional \$35 / mo", and "Clinic \$50 / mo". The "Free" plan lists features: "Unlimited audio and video", "HIPAA compliant", "Business Associates Agreement", "Personalized room URL", "Virtual waiting room", "Patient queue", "Real-time messaging", "Mobile friendly", and "Email and community support". The "Professional" plan lists features: "Everything in Free", "HD/SD quality", "Personalize waiting room", "Text and email alerts", "Photo capture", "Group call", "Screenshare", "File transfer", "Payments", and "Live chat and phone support". The "Clinic" plan lists features: "Everything in Professional", "1 users per account", "White label", "Custom subdomain", "Shared rooms", "Grant room access", "Admin controls", "Teleconsent", "Dedicated account representative", and "Add ons and customization". At the bottom of the main content area are three buttons: "Get Day Pass - \$10", "Enable Free Trial", and "Upgrade to Clinic".

### 3.5 Integrate Doxy.me with your PMS

There are two ways which you can integrate Doxy.me with your PMS to present a seamless workflow to your patients.

- The first, which we recommend, is to update the text of your appointment reminder messages. These are the SMS and/or e-mail reminders you send to patients today. You may need to work with your PMS vendor or appointment scheduling vendor to update the text of these messages and make them specific to virtual consults vs. face to face consults.

If you are not sending these types of appointment messages today, consider this a good time to add them to your practice solution.

- The second step to integrate Doxy.me with your PMS aims to make it easier for physicians to access Doxy.me and begin their appointments. You may choose to:
  - 1) Create a bookmark in the web browser to quickly access Doxy.me. There is a “remember me” option that will allow you to login without having to re-enter your username and password each time. This is the simplest and recommended option.
  - 2) You may choose to include the link to your Doxy.me waiting room (the link for clinic users, not for patients) in the appointment notes of your PMS when scheduling virtual consults. This will allow physicians to easily click the link to the virtual waiting room when getting ready for the appointment. In this integration, front desk staff will manually type in (or copy and paste) the link to the Doxy.me waiting into the text of the appointment notes.

- 3) If the above integrations are not satisfactory, you may wish to ask your PMS vendor to create a button in the PMS which launches your specific Doxy.me waiting room by opening your default web browser. To achieve this result, you will need to contact your PMS vendor. To be clear, this level of integration is not necessary nor time saving vs. options 1 and 2.



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