Use Cisco Webex for Telehealth Appointments

Clinics can communicate with the patient using the **Cisco Webex** application for **video-conferencing**. To facilitate this in clinics you will **need a workstation with a camera**. These are typically found on all-in-one PCs. You may also use laptops and iPads.

Each staff member will have their own **virtual Personal Meeting Room in Cisco Webex**. Clinics should **decide on a meeting host for each designated telehealth appointment room/space and utilize the appropriate meeting URL**. Patients will then be provided the link that corresponds with the room for their appointment. In turn, this room will be used by clinic staff to host the appointment at the scheduled time.

Staff MUST set up their Personal Meeting Room preferences. You may reference the *Set up Webex Personal Meeting Room Preferences* tip sheet for details.

For patient privacy, staff must set up **Personal Meeting Room preferences** for **an automatic lock** so that patients can be admitted to a meeting room individually, and then dismissed from a meeting prior to the next appointment with another patient.
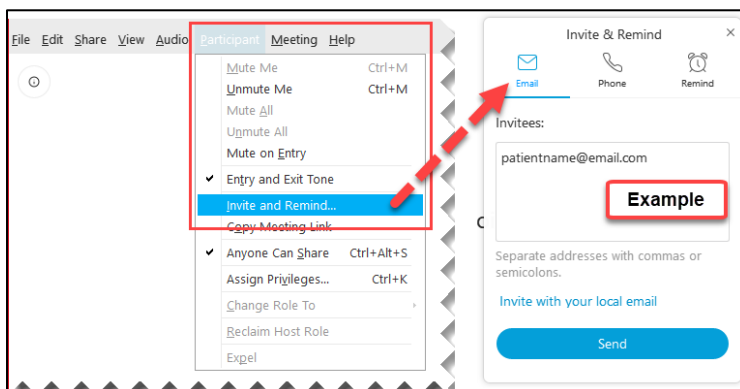
- Personal Room link format: https://upstate.webex.com/meet/[upstate user ID]
  Example: *https://upstate.webex.com/meet/doej*

Share the Meeting Link with a Patient

- The **meeting URL** appears on the **Cisco Webex homepage** for the meeting host. To share the meeting URL, **right-click and select Copy**. Then **paste and send to the patient via email**.


- *If the meeting has already started*, you can also use the **Participant menu** and go to **Invite and Remind** to send the link to the patient via **email**.


Use Cisco Webex for Telehealth Appointments Upstate Tip Sheet
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Start the Personal Meeting

1. From a **designated telehealth room/workstation**, the **meeting host** will log in to their Upstate Webex account.
2. From the **web browser**, go to **https://upstate.webex.com**, **sign in**, and enter **Upstate credentials**.
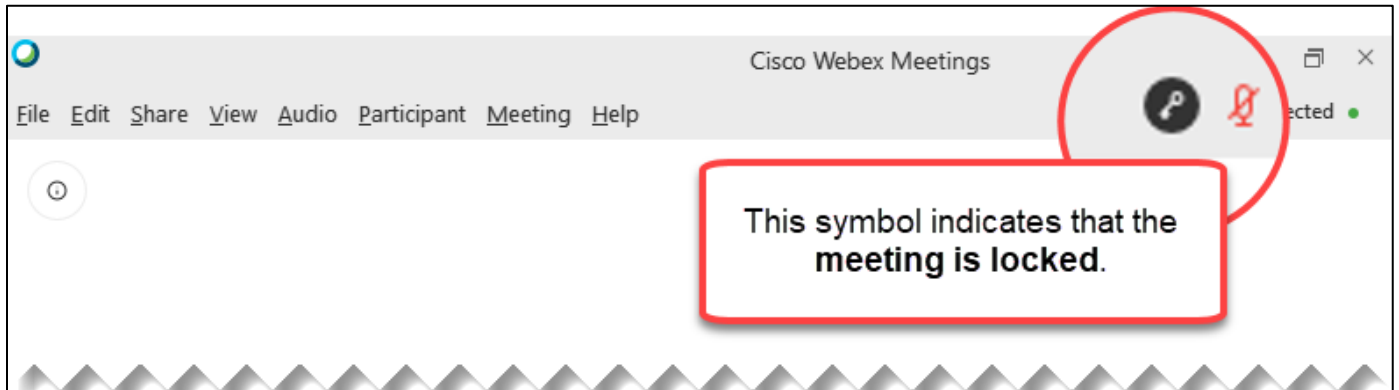3. At your **Cisco Webex homepage**, click **Start Meeting** to enter the Personal Meeting Room.
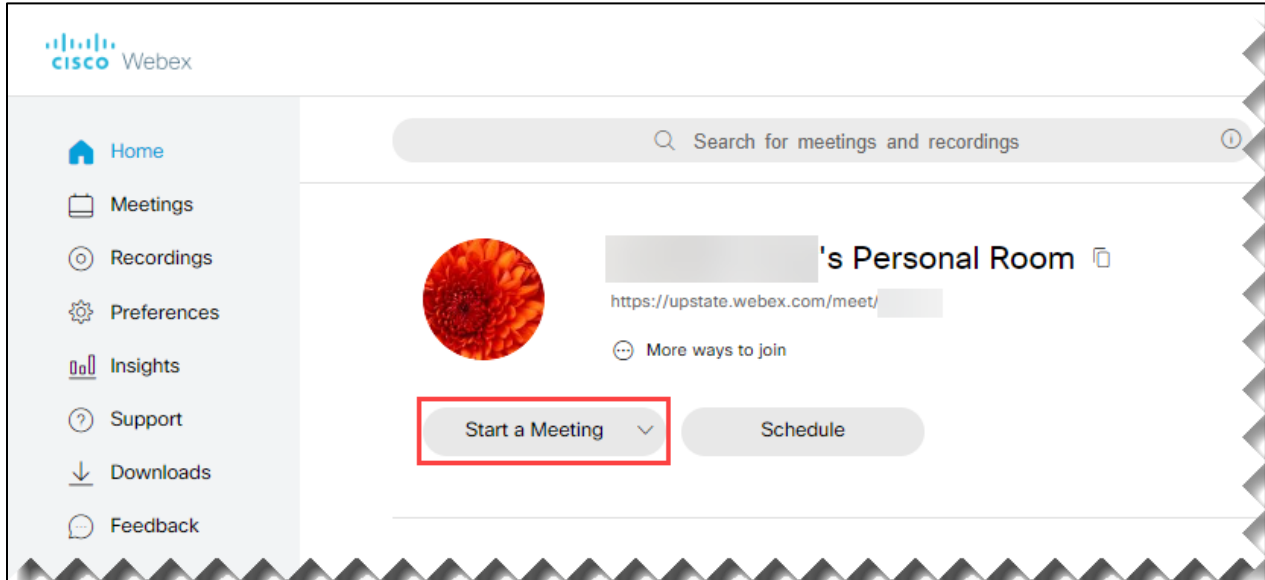

4. **Use the green button to Start Meeting**.
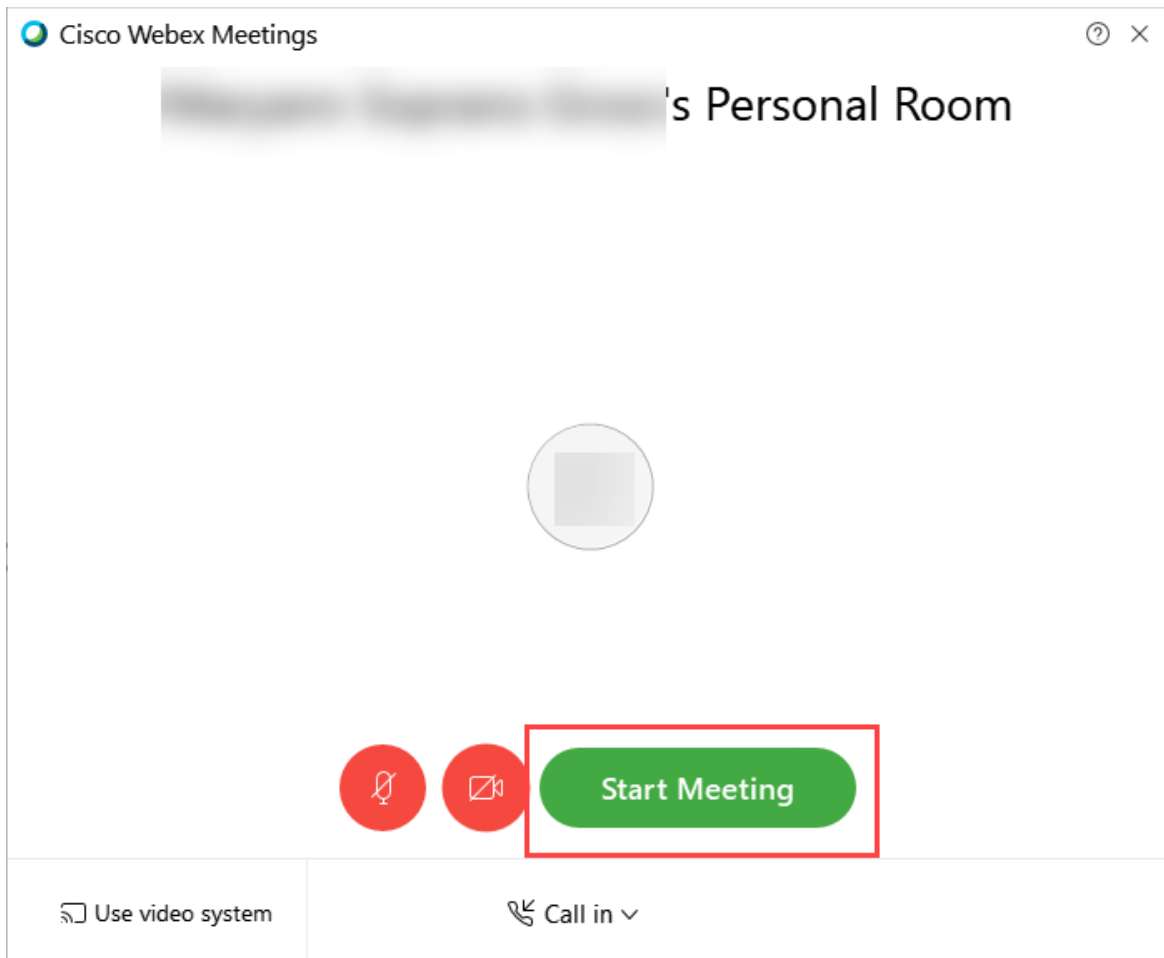
# Use the Meeting for Appointments

5. ***If preferences were set up with an automatic lock***, the meeting room will indicate a lock which means participants will be admitted to join only when the host allows it.


6. ***If the meeting is not locked***, users can lock the meeting on-the-fly. From the meeting, click the three dots icon and select Lock meeting.
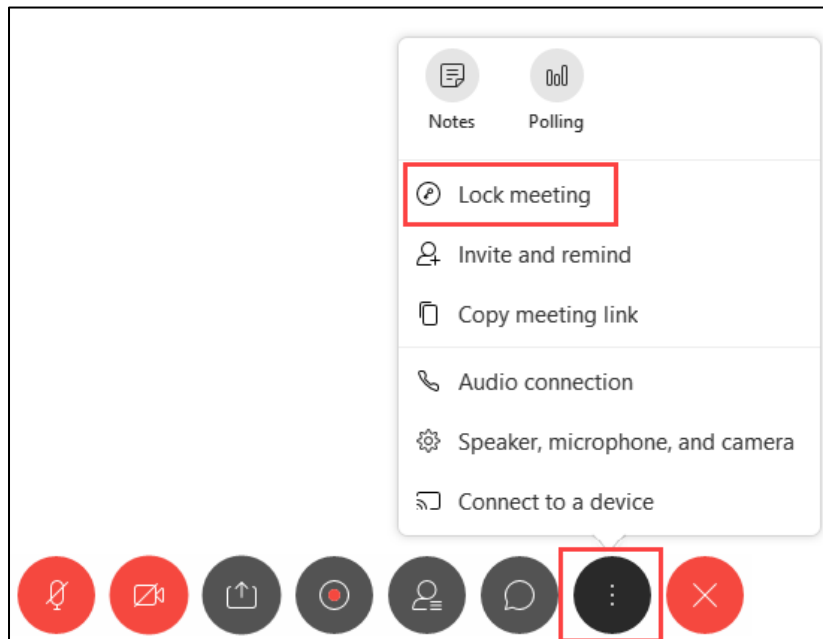
7. **When a patient (or attendee) joins the meeting, they will be placed in the lobby of the Personal Meeting Room. A notification will display**. Use the Admit button to allow the attendee entrance to the meeting.
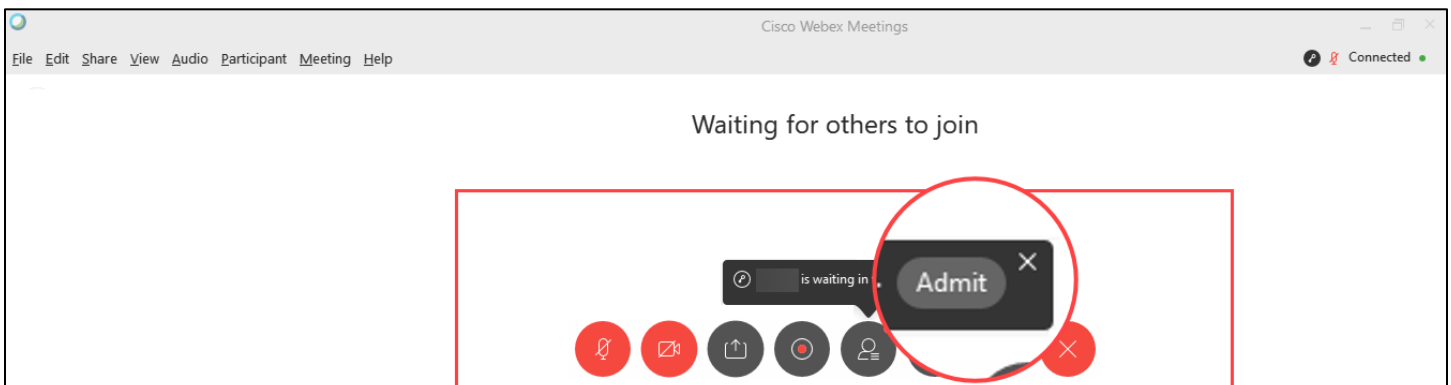
8. **Click the Participants icon to load the sidebar to monitor active participants and those waiting in the lobby.**
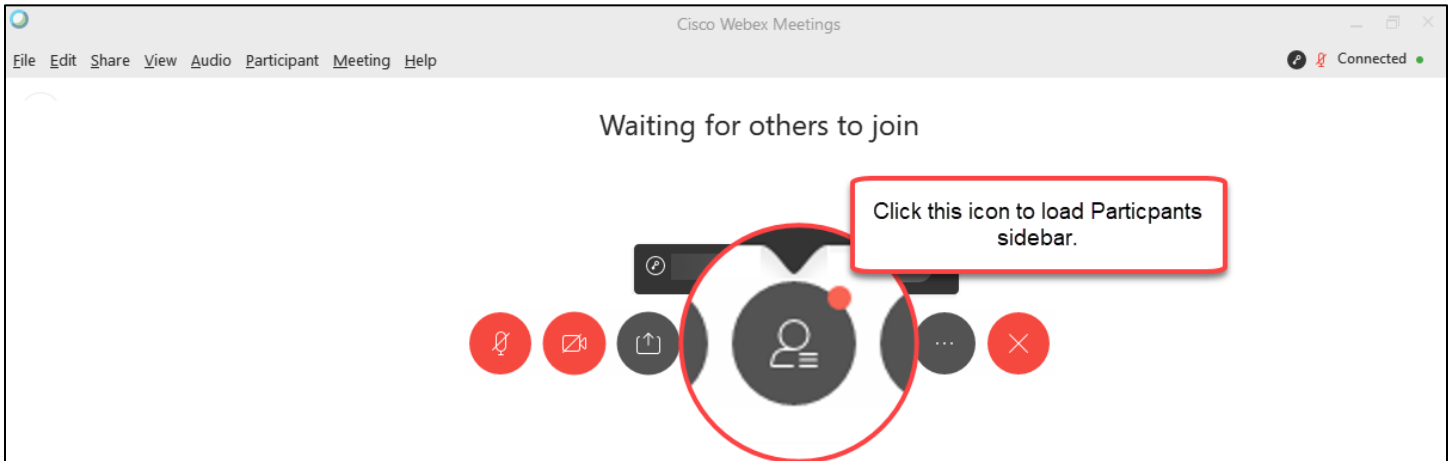

Manage Participants from the Sidebar

9. The **Participants sidebar** allows you to **Admit** an attendee to the room.
10. If multiple patients (or attendees) are in the lobby there are some options. From this sidebar you can **move an attendee back to the lobby**, **expel an attendee from the meeting**, or **admit a new attendee to the meeting**.
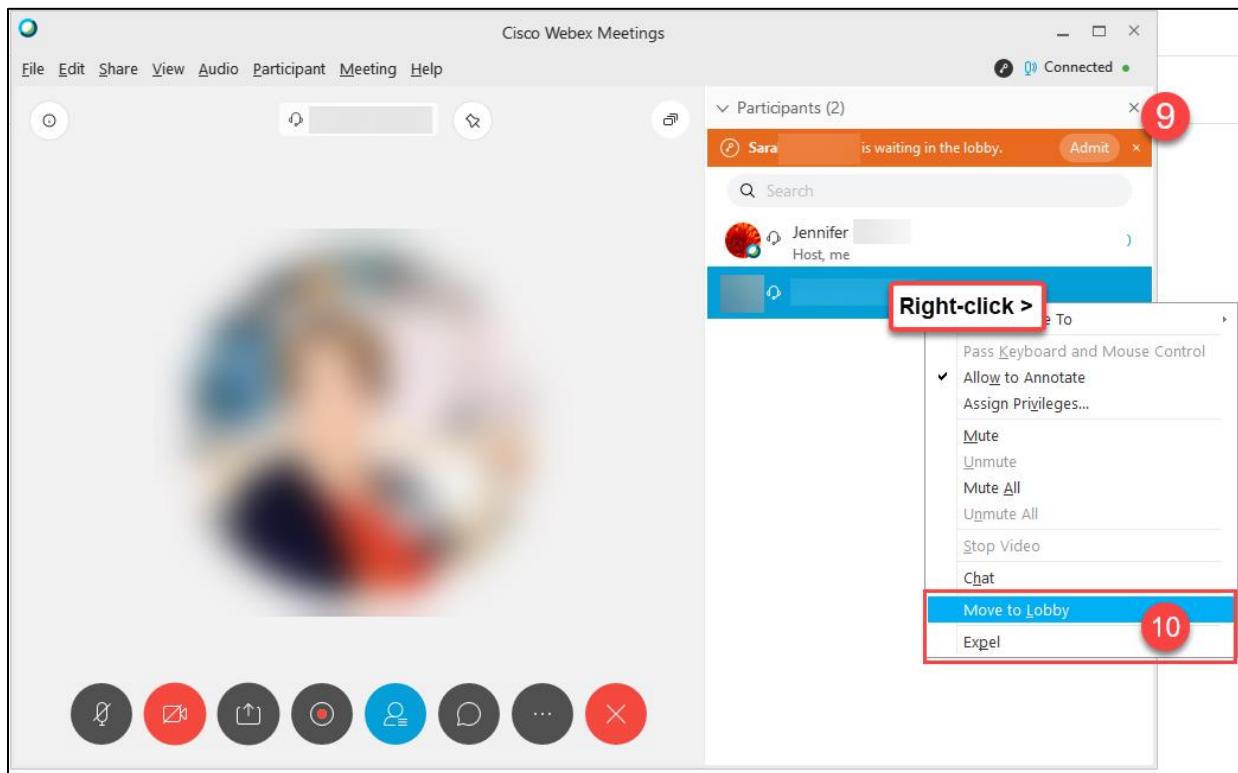
In Ambulatory clinics, it is important to **MUTE** and **STOP VIDEO BEFORE** you secure the workstation and leave the room. Microphone and video will continue to run even if the workstation is secured.

Mute / Unmute

11. Use the **microphone** in WebEx to **mute or unmute**. If the button appears red, you are muted.
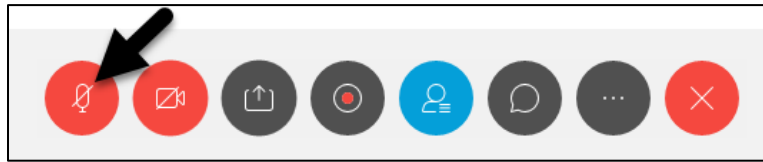
Is the Patient muted?

12. **You can also control the patient's microphone as needed**.
    a. If the patient (attendee) is muted a red **microphone displays** next to their name in the **Participants sidebar**. Ask the patient to unmute. If they are having difficulty, you can **click the microphone to unmute**.
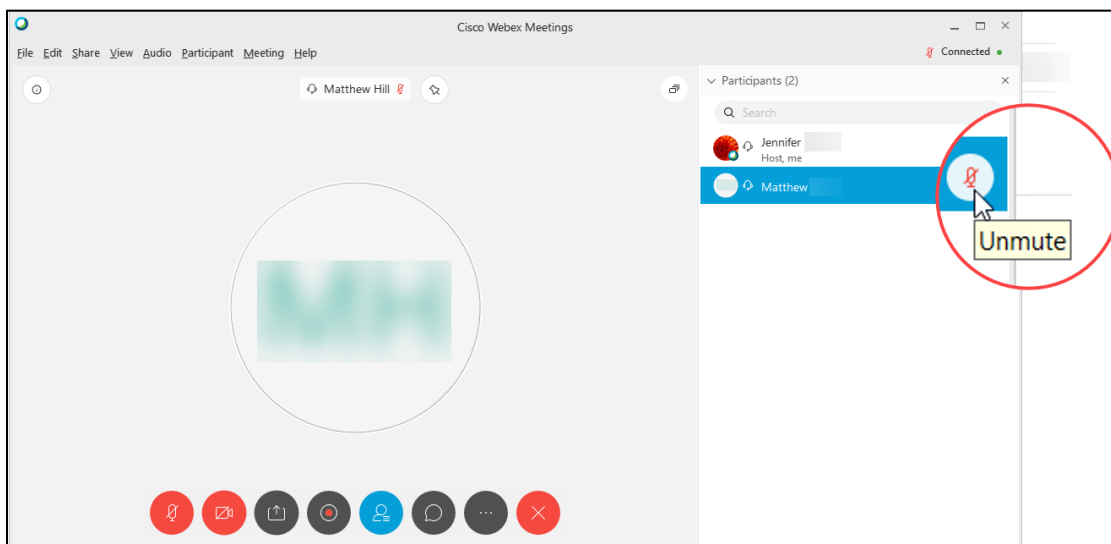
Turn Video on or off

13. Use the **camera** in WebEx to **turn video on or off**. If the button appears red, video is off.
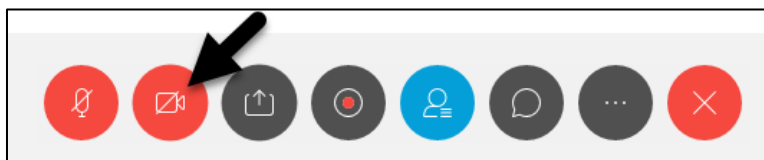
Leave / End the Meeting

14. Use the **red X** in WebEx to **end the meeting**.