

Video Visits Elders Project

Tip Sheet

- **Provide a clear distinction of your role as outreach personnel and not clinical personnel.** Many patients request appointment changes, contact info updates, secure messaging via MyChart etc. Explain that we are a part of a technical team at UCSF that only assists with Zoom set-ups and provide the practice phone number so they can call them directly for these requests.
- **Make sure to verify that the patient has a device with BOTH camera and microphone and that they are relatively new,** as zoom is not compatible with older computers. (Look up how old compatibility for latest Zoom version)
- **If someone is having a particularly hard time on their computer, suggest trying on their phone.** Downloading the app on their cell phone is usually more straight forward and easier to direct than downloading zoom on their computer.
- **Make sure to clarify you're asking them to search in the web browser not google.** Some patients who are less used to using a computer may assume the google search bar is the web browser search bar.
- **Provide visual cues:** Describing items is helpful, for example when directing patients to the App store, for those who have problems locating it, you can describe it as the "Blue square icon, with the shape of an A on it" or for MAC devices, the web browser Safari can be described as the "Square or box like icon that has a blue compass on it".
- **A second option for accessing the Zoom download:** if you google the words "Zoom download", a box pops up with a link that says "Go to download". If you click on "Go to download", it takes you to a website with a large "Download" button for Zoom Client for Meetings.
- **Often, the audio on the zoom app (via phone) will not be very loud.** Make sure to have the patient tap on the speaker icon on the top left of the screen to raise the volume on the app. If this does not work, have them manually raise the volume on their device.
- **If they are connecting to Zoom on their phone, the patient must allow access to both their camera and microphone.** When the prompt to select an option for audio comes up, the "connect to internet audio" option is the best.
- **Encouragement:** Many patients seem to get discouraged when they are unsuccessful/taking a considerable amount of time for set up. Use simple encouragement, for example: "It's okay take your time, I am here to help" or "Don't worry, even if we are unable to get you set up there are other alternatives to visit with your provider such as a phone call".
- Patients might tell you that they don't know how to do it and that it might waste your time. Tell them that you can walk you through it for them to give it a try.
- **Be patient:** It can take longer for older patients to navigate their technical devices. Be prepared to be on the call for a long time. Calls are encouraged to be fast, but it can be difficult to get off the phone call when patients really want to talk to you. Sometimes we are the only people from clinic communicating with them.
- **If the patient is having trouble following verbal instructions offer to follow up over email.** If the process is taking very long (>40 mins), offer to email the patient written instructions and follow up with them via phone afterwards or tell them to call us back at the call back number if they still need our assistance. Some people find this is more useful than trying to follow verbal instructions.

- **Keep in mind that not everyone has access to devices, and even if they do, it doesn't necessarily mean they know how to use it.** Few people who have smart phones don't know how to download an application. Try to evaluate whether a patient can learn to download zoom with your guidance by paying attention to how they talk about their phone, what they see, whether they can find the app store, etc. If this goes smoothly, move forward with the Zoom download and practice. If they can't navigate their phone, tell them that their doctor will call them on the phone instead of a video appointment. Many times, this is what they are hoping will happen but are unsure if it is an option at all.
- **If patient is able to access email, sending them images / instructions in their preferred language is helpful.**
- **Go over the simplified step by step instructions once you've successfully had a Zoom test call, allowing the patient to take any necessary notes to ensure that they are able to replicate these steps.**
- **Practicing a test connection with a patient:** If you have "Zoom waiting room enabled" enabled you will not need to provide a password to the patient for the practice call. This process is the one that best represents what they will experience during their video call. If you don't have your waiting room enabled you can create a meeting for your call and provide the meeting ID and password to the patient, however, make sure to clarify that although a password is needed for this test call, it is not needed when they sign in to have their video appointment with their provider.