



TECHNOLOGY GUIDE

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Welcome to Telepresence! We think you will find this a rewarding and convenient way to obtain mental health care.

Many people are relieved to learn that no experience or technical expertise is necessary to attend sessions via videoconference. All you need is broadband internet access (DSL or cable), a computer, and a webcam to access our services. You can even use your smartphone over Wifi, if you prefer.

We offer a secure, private, easy-to-use videoconferencing solution that is integrated into our patient health portal and electronic medical record (CharmEHR), so everything is secure and private. The program works over the internet, so it is compatible with any kind of computer, anywhere with internet access, even at work or behind a firewall.

Here's how it works: CharmEHR will send you an email with a meeting invitation into your own private online "room." You simply click on the link within the email, and the program launches itself. It works seamlessly without any technical knowledge needed. This solution is not only easy, it is fully HIPAA-compliant.

One note: CharmEHR will suggest that you need to join your meeting 30" before it is scheduled, to allow the app to install and any initial troubleshooting to be completed. That is NOT strictly necessary. However, it IS necessary to do a test call prior to our first visit to ensure everything works correctly. That will ensure we do not spend your valuable visit time on technical issues. You can do a test call at the following link at time that is convenient for your (full instructions on next page). <http://zoom.us/test> We recommend you join your actual visit 5-10 minutes in advance, to give your system time to connect.

We are happy to assist with technical questions on the built-in platform to ensure that your first session is easy and hassle-free. However, if you have questions related to installation or setup of your webcam, you will need to utilize the technical support available from your webcam or computer manufacturer. If we are unable to connect due to technical problems, your appointment will be conducted via telephone at our usual hourly rate.

How to Complete Your Test Call

You can join a test Zoom meeting to familiarize yourself with the Zoom and test your microphone/speakers before joining a Zoom meeting. You can also test your [video](#) or [audio](#) while in a Zoom meeting.

Note: If you are using the Zoom app on mobile, you can visit <http://zoom.us/test> to join a test meeting, then follow the instructions to test your [video](#) or [audio](#).

Instructions

1. Visit <http://zoom.us/test>.
2. Click the blue **Join** button to launch Zoom.
3. When prompted by your browser, click **Open Zoom Meetings**. If you don't have Zoom installed on your computer, follow the prompts to download and install Zoom.
4. The test meeting will display a pop-up window to test your speakers. If you don't hear the ringtone, use the drop-down menu or click **No** to switch speakers until you hear the ringtone. Click **Yes** to continue to the microphone test.
5. If you don't hear an audio reply, use the drop-down menu or click **No** to switch microphones until you hear the replay. Click **Yes** when you hear the replay.
6. Click **Join Computer Audio**.
7. Click **Join with Computer Audio** to join the test meeting with the selected microphone and speakers.

You will join the test meeting as an attendee. Learn more about [Attendee Controls in a Meeting](#).

CharmEHR Zoom Videoconference Program Tips

- Prior to our session, you will be sent an email containing a link. This link will take you directly to the session.
 1. This message will come from: no-reply@charmtracker.com so if you don't receive it shortly, please check your Spam folder. You may also want to add this domain to your Whitelist, so that no messages end up in Spam.
- Since Zoom (Charm's secure video platform) installs itself to your computer automatically, all you need to do is click your meeting link a few minutes prior to your scheduled appointment to allow time for the installation to complete.
 2. You do NOT need to sign up for your own Zoom account.
- When our session launches, the program will create a pop-up to ask you if you'd like to use Join by Computer or Join by Phone. Computer is usually the default. Simply click Join Audio (after checking that Computer is highlighted) to use the microphone built into your webcam, which is usually the easiest way.
- If your webcam is new to you, or if you just want to test this out before your appointment, you can click the meeting link anytime you like prior to your meeting to see how the program works on your system and confirm that your webcam is correctly installed.
- If you prefer to attend your session via smartphone, Zoom supports either iOS or Android devices. Simply search for the "Zoom Cloud Meetings" app in your App Store.
 3. Please keep in mind that videoconferencing uses a lot of data, so we highly recommend you connect to a wireless internet connection (WiFi) rather than using your cellular data allowance for sessions.

OPTIONAL: Another appointment log-in option is available. You can also log into your meeting through your Patient Health Record portal (PHR) in Charm, if you have set up your account. If you choose to log-in that way, the steps are below:

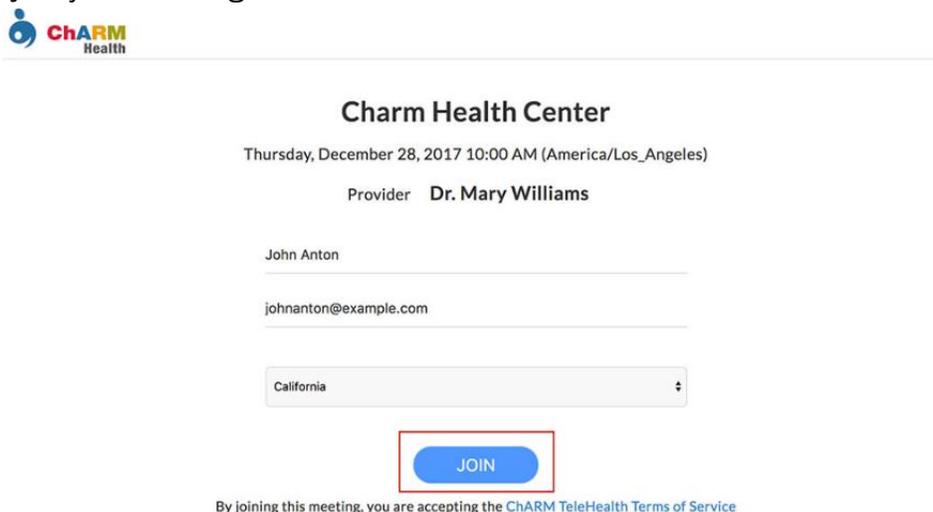
1. Log in to Patient Portal and go to the 'Appointments' section



2. Click on the 'Check-in' button shown next to the appointment



3. Select your state of residence and click on the 'Join' button. Then wait for the doctor to join your meeting



Zoom video platform is used for this telehealth session with your provider. You will be asked to install a Zoom plug-in, if it is not already installed in your machine.

Basic Videoconferencing Tips

- **Internet:** Videoconferencing requires a fast and steady internet connection. The best connections are wired (ethernet) connections, followed by wifi, followed by your wireless cell network. Please note: Videoconferencing can easily use 4GB of data in an hour, so I strongly recommend you utilize Wifi or wired internet for sessions, to avoid using up too much of your cell phone data allowance during our session.
- **Setting:** Choose a private setting where no one else can see or hear us. Ideally, you should be in a well-lit room, either at home or work, with the door closed. You could also connect from your parked car or a shaded outdoor area with little traffic, but, again, you will need to be aware of available Wifi and your data usage in such locations. Choose a time and place where you won't be interrupted. Turn off the TV and close any programs or apps on your device that may distract you.

If this is your first time videoconferencing, or if technology makes you a bit nervous, you can just skip this page! 😊

Videoconferencing doesn't have to be complicated. Following the instructions on the prior pages will result in an easy, problem-free meeting experience for the vast majority of patients - even if you ignore all of these "finer points".

Advanced Videoconferencing Tips

Spending a few minutes to set up and test your videoconference equipment will help ensure the best results during our appointments. Here are some pointers:

- **Lighting:** Most webcams will adjust lighting automatically so that we can see each other well. Lighting from the front or side helps me see you better. If the light is behind you, you will appear as a silhouette, and it will be harder for me to see your expression. If you are outdoors on a sunny day, try to connect from the shade, as bright sunlight may wash out the picture.
- **Sound:** The built-in microphone on your webcam or smartphone is usually sufficient for our sessions. Try to stay 1-2 feet from your microphone and speak directly towards it during our sessions, to make sure the microphone picks up your speech. Some people like to use a headset with a built-in microphone such as you would use to talk or listen to music on your cell phone. They are available at the pharmacy or electronics stores for about \$20. This will help you hear me better and prevents others from overhearing what I say to you. It can also help me hear you better.

- Position: To obtain the best results with your video camera, place your device on a steady, level surface such as a desk. If you need to hold your camera in your hand, try to hold it steady and stay in one position. Keeping the camera pointed at your face around eye level, around 1-2 feet from your face, will make sure I can see your entire face.
 - In some cases I may need to see your entire body while sitting, standing or walking (for example, to evaluate your walking or evaluate tremors). We may need to find a way to position the camera so that I can see you from head to toe, but we can figure that out during your session.

Welcome to the future of mental health care, and thank you for choosing SynerGenius Telepresence!