

Epic Video Client Reference Guide

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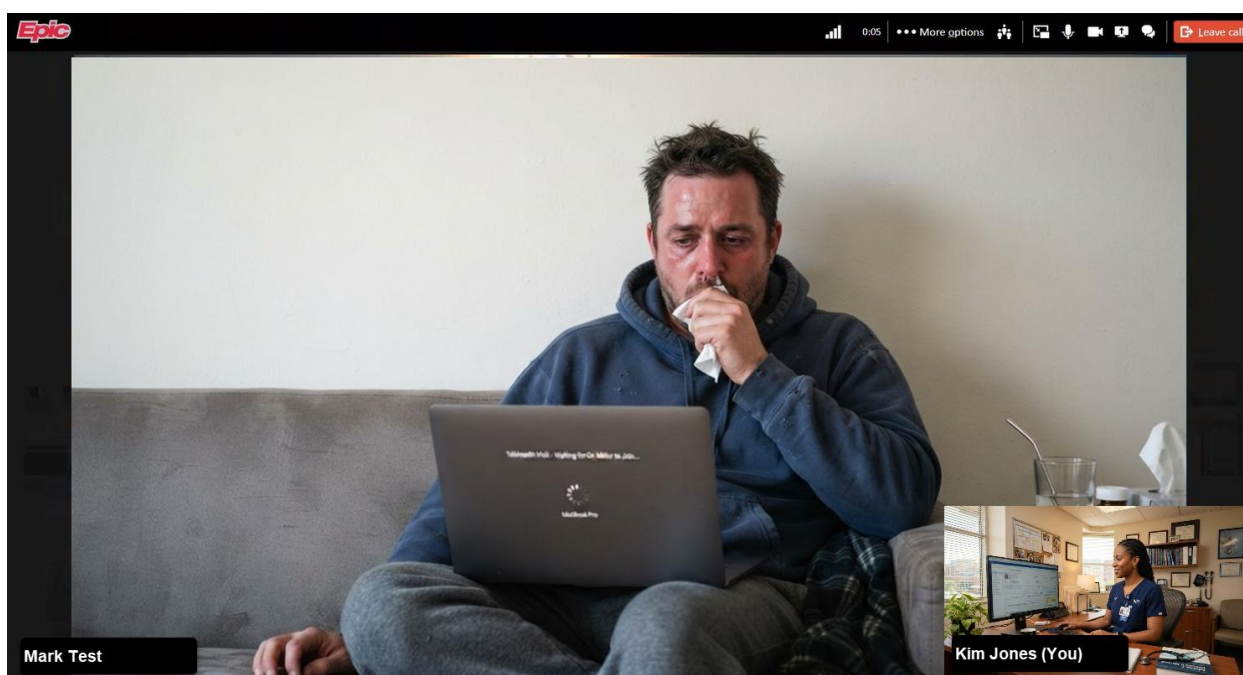
Virtual visits must be conducted in **Epic** unless an alternative workflow has been approved by IS and operational leaders. The terms **virtual visit** and **video visit** are used interchangeably in this document.

Start a Scheduled Virtual Visit from Your Computer

1. Review the **Visit Type** column on your Schedule to identify virtual visits. Before a patient joins, the appointment status displays as **Scheduled**. Once the patient joins, the status changes to **Arrived**. **If you're waiting for a patient to join, click  Refresh in the upper right corner of the Schedule.**
2. To review the patient's chart before starting the visit, double-click the patient's appointment row on the Schedule. When you're ready to connect, click  **Connect to Video** in the **Connect** section of the navigator. Once connected, the participant's name appears. For pediatric visits, the connected participant may be the patient's proxy.



3. After connecting, the video window opens. The **patient** appears in the main window, and your camera feed appears as a **thumbnail** at the bottom of the screen. This thumbnail shows the image being shared with the patient. You will see options for audio, video, participants, and the ability to share your screen for patient education materials. (The patient and provider shown in this image are fictitious.)



4. When you connect to the patient, an **OurPractice Advisory (OPA)** opens to document the patient's location and verify that you are **licensed** in the state where the patient is located. **Completion of the OPA** is required for telemedicine encounters.
 - a. Use the available **speed buttons** and **fields** to document the required telemedicine information.
 - b. If the patient is located in a state where you are not licensed, inform the patient that the visit must be rescheduled and click **Accept**.

9/24/2026 visit for ECARE VIDEO VISIT - Cough, fever

Connect **Advisories** Visit Info Vital Signs Care Everywhere Verify Rx Benefits Outside Meds Medication Review History Review

Depression Screen (18+) Social Drivers Rsrc Brochure Community Resrc Usage

Connect

Connect to Video Handoff to Canto Send Direct Link

The following users are currently connected via Epic Video Client:

Mark Test

OurPractice Advisories

Quality and Compliance (1)

Patient location documentation is required for Telemedicine encounters. Accept (1)

Document

Document: AMB Telemedicine Encounter Patient Location Edit Details

Telemedicine Encounter

Consent obtained?

Yes

Where is the provider currently located during the visit?

Office Hospital Home

What state is the provider currently located during the visit?

Visit Type?

Video Visit using audio-visual technology Video Visit using audio-visual technology and peripheral devices

Audio-Only Virtual Visit

Where is patient currently located during the visit?

Home Hospital Prison School/Telehealth Clinic College SNF/Nursing home/Domiciliary Vehicle (Parked)

Work Other

5. Once the visit is complete, click **Leave Call** if you are the only provider participating in the visit.

Send the Video Visit to Your Mobile Device

If you'd like to complete documentation on your computer while using your mobile device for video and audio, you can transfer the video visit to **Haiku** or **Canto**.

1. Open the patient's video visit encounter from your **Schedule**.
2. In the **Connect** section of the navigator, click **Handoff to Haiku** or **Handoff to Canto**.

Refer to the image on the following page ...



3. On your mobile device, open the push notification to launch the patient's chart in **Haiku** or **Canto**.
4. If you are the first participant to join, tap **Start Video Call**. If the patient has already joined, tap **Join Video Call**.
5. **TIP:** Sending the video visit to your mobile device allows you to keep the patient's chart open on your computer for documentation while conducting the visit from **Haiku** or **Canto**.

Start a Scheduled Video Visit from Your Mobile Device

1. Log in to the mobile device. Then, log in to the **Haiku** or **Canto** application.
2. Find the **video visit** on the Schedule. Look for the 📺 icon next to the appointment time.
3. Tap the patient's appointment to open the chart.
4. Click 📺 **Video Visit** on the toolbar to open your video visit options.
5. Tap **Connect to Video** to join the video visit.
6. **NOTE!** While connected to a video visit, the **Video Visit** activity occupies the full screen. Opening another activity pauses your video, and the patient sees your initials instead of your video until you return to the **Video Visit** activity.

Invite Additional Participants

Use **Send Direct Link** to invite family members, caregivers, interpreters, other providers, or patients who are unable to join through MyChart. Direct links bypass MyChart and do not prompt patients to complete e-Check-In, consent forms, or co-pays. Confirm required e-Check-In activities are completed before sending a patient a direct link.

1. Open the patient's video visit encounter.
2. In the **Connect** section, click **Send Direct Link**.

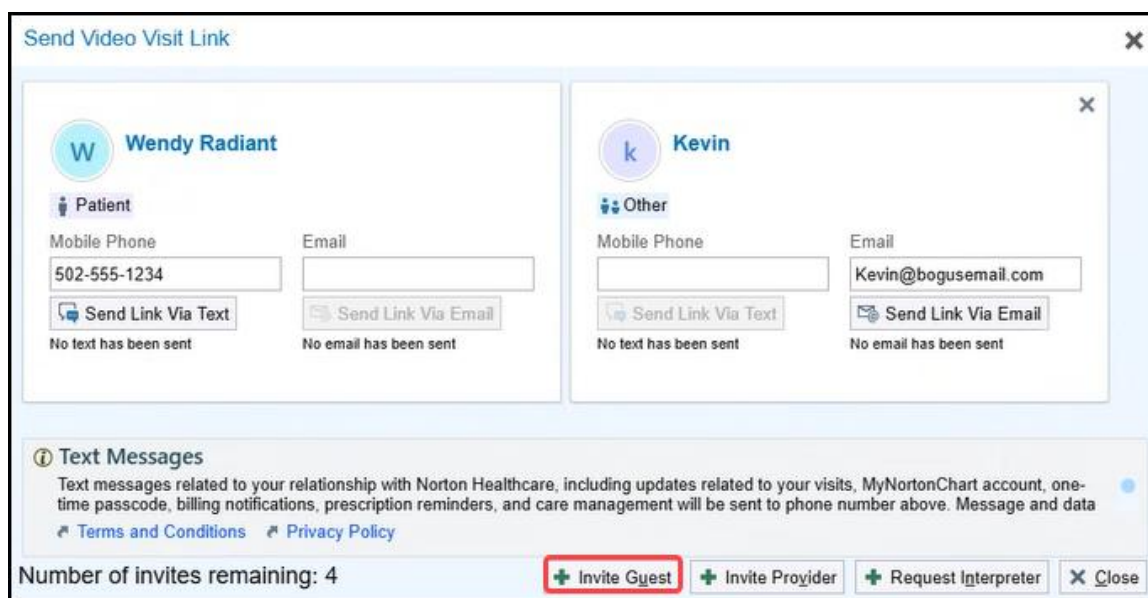
Refer to the image on the following page ...



3. In the **Send Video Visit Link** window, choose one of the following options:

- To send the link to the patient's contact information on file, click **Send Link via Text** or **Send Link via Email**.
- To send the link to a different phone number or email address, enter the information in the **Mobile Phone** or **Email** field, then click **Send Link via Text** or **Send Link via Email**.
- To invite a family member, caregiver, or other guest, click **Invite Guest**, enter the required information, and send the link by **text** or **email**. A maximum of **five invitations** can be sent per video visit.

In this example, Kevin, the patient's son, will be **invited as a guest**. The remaining invitation count decreases from 5 to 4.



- To invite another provider, click **Invite Provider**, enter the provider's information, and send the link by text or email.

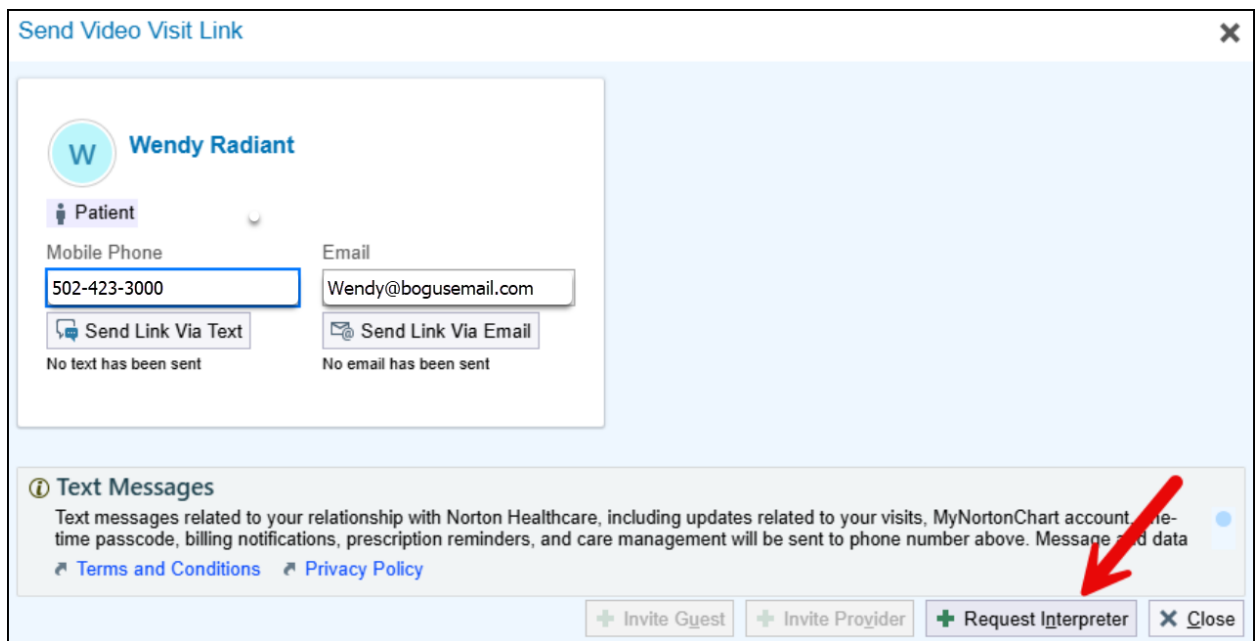


Invite Interpreters to a Video Call from Hyperspace

As described in the previous section, **Send Direct Link** can be used to invite additional participants to a video visit. It can be used to **request an interpreter** from Norton's third-party interpretation vendor. The

interpreter request automatically populates the patient's preferred language, and the request updates when the vendor accepts the request. Once available, the **interpreter** can join the video visit.

1. In the **Send Video Visit Link** window, click **Request Interpreter**.



Send Video Visit Link

W Wendy Radiant

Patient

Mobile Phone: 502-423-3000

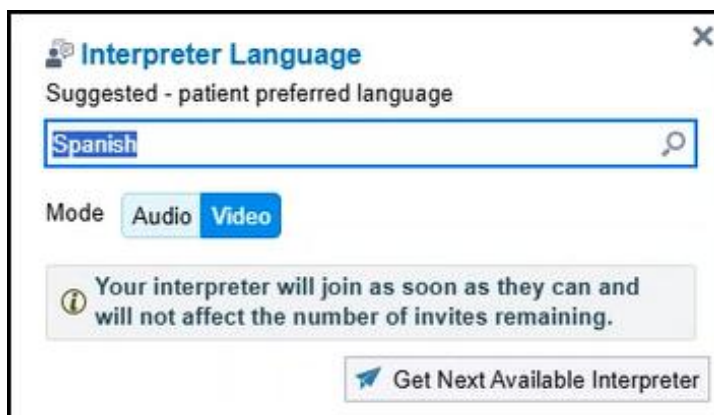
Email: Wendy@bogusemail.com

No text has been sent No email has been sent

Text Messages
Text messages related to your relationship with Norton Healthcare, including updates related to your visits, MyNortonChart account, one-time passcode, billing notifications, prescription reminders, and care management will be sent to phone number above. Message and data

[Terms and Conditions](#) [Privacy Policy](#)

2. The patient's **preferred language** is automatically selected when available. Some interpreter languages are available in **video** while others are available only in **audio**.



Interpreter Language

Suggested - patient preferred language

Spanish

Mode

Your interpreter will join as soon as they can and will not affect the number of invites remaining.

3. If it is not available, select the appropriate language from the **Interpreter Language** dropdown list.

Refer to the image on the following page ...

- Once the request is submitted, the status displays as **Pending** until an interpreter accepts the request and joins the visit by **audio** or **video**.

- When the **request is accepted**, the interpreter request card updates with the acceptance time. Requests for less common languages may take longer to fulfill. Resending the request does not cancel the original request.

Multiple Provider Workflow

Multiple providers can participate in the **same video visit** simultaneously. Each provider must log in to the department where the virtual visit is scheduled and open the patient's encounter.

- Once the patient's status is **Arrived**, follow the steps in **Start a Scheduled Visit from Your Computer** to join the visit.
- Additional** providers can join the visit by following the same process.
- Providers can **join** or **leave** the video visit as needed without disconnecting other providers who remain connected. This allows multiple providers to participate in the same visit independently.

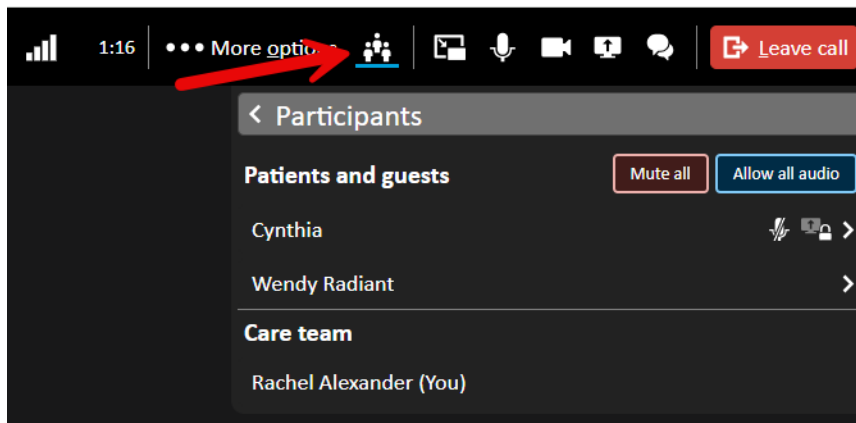
Moderator Controls

Use **moderator controls** to manage participants and meeting settings during a video visit.

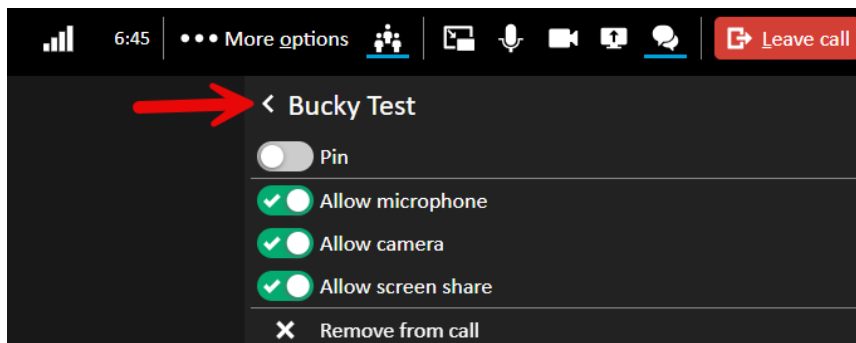
In-visit Moderator Controls

Use in-visit moderator controls to manage participants during a video visit. Moderators can disable microphones, cameras, and screen sharing for other participants, or remove participants from the visit. Participants must manually re-enable any microphone or camera that has been disabled. Patients who are removed from a visit cannot rejoin the same visit.

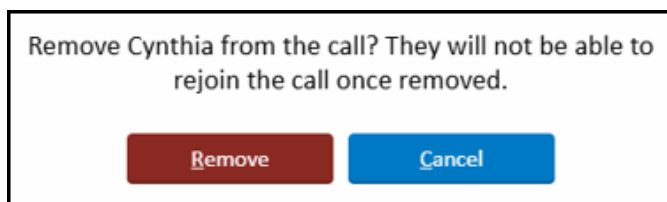
1. Click the **Participant List** icon.



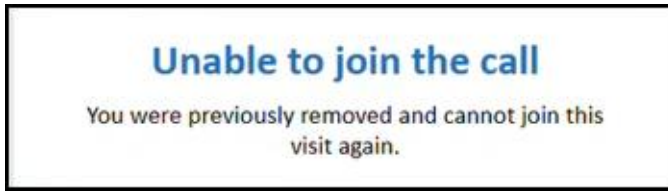
2. Select the **participant (patient)** and use the controls to enable or disable the microphone, camera, screen share, or remove them from the call.



3. Confirm **removal** of the participant (patient) from the call.



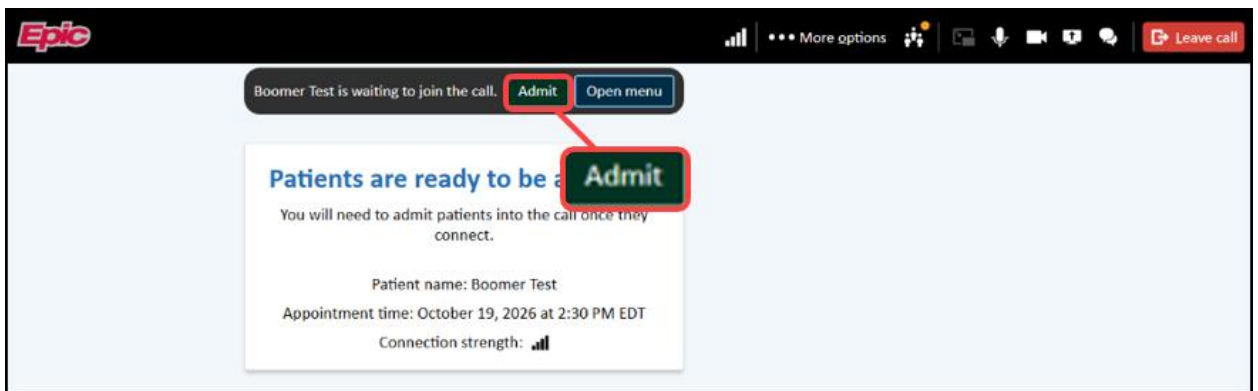
4. Patients who are **removed** from the visit cannot rejoin the same visit and are notified in MyChart.



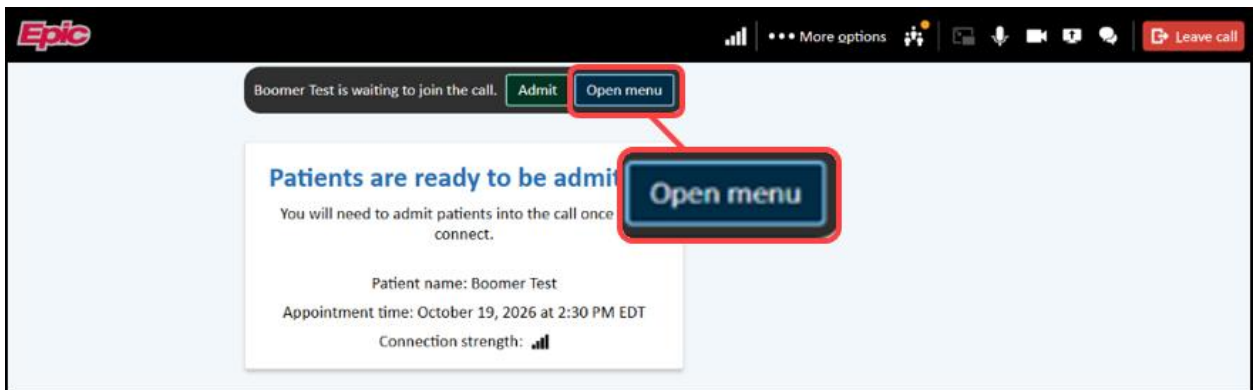
Admit Patients and End Visits

Patients enter a virtual waiting room after clicking **Join Call**. Providers must **admit** patients before they can enter the video visit. Providers can also **end the visit** for all participants, removing everyone from the call.

1. Providers are notified when a patient is ready to be **admitted**.

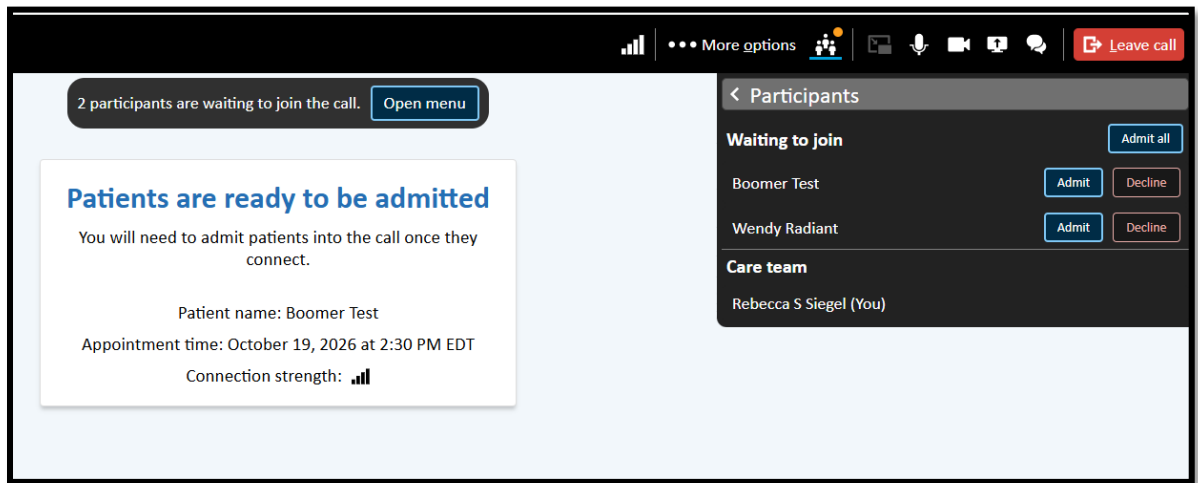


2. For group visits involving more than one patient, click **Open Menu**.



3. Admit patients **individually** or **Admit All**.

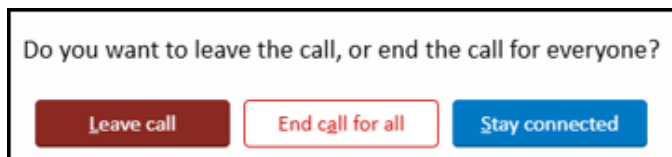
Refer to the image on the following page ...



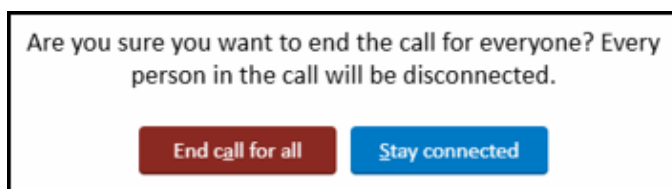
4. When the visit is over, click **Leave call**.



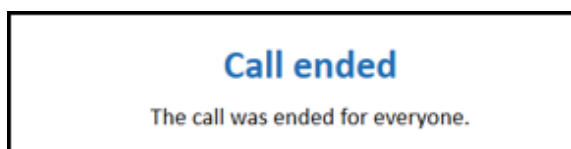
5. Click **End call for all**.



6. Confirm **ending the call** for everyone.



7. The provider and patient(s) are notified that the call was ended.



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This guide is based on Epic 2026.