

Zoom Manual

Vancouver Coastal Health



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FAQ

Q: Who requires an account?

- Administrative staff supporting clinicians, physicians, or operations
- Clinicians and physicians
- Clinics can use a generic account if not running meetings concurrently

Q: What platforms support Zoom?

- Apple and Android devices, as well as Windows Desktop

Q: What can I do on the platforms?

Web Portal	<ul style="list-style-type: none">• Book meetings• Run meetings• Change account settings <p>*Recommended for setting up meetings due to advanced functionality</p>
Mobile App	<ul style="list-style-type: none">• Run meetings• Instant meetings
Desktop	<ul style="list-style-type: none">• Run meetings• Instant meetings

Q: What about privacy and cost?

- Canadian privacy compliant
- Free download for Vancouver Coastal Health staff

Q: What are the meeting types?

Webinars	<ul style="list-style-type: none">• Allow Appointment Confirmation• Allow Appointment Reminders• Ability to control who can speak <p>*Recommended for group education broadcasts or appts that require reminders</p>
Meetings	<ul style="list-style-type: none">• Group Meetings- Interactive• Short turnaround appointments• Allow the use of the Waiting Room function <p>*Recommended for interactive group meetings or appointments with short turnaround (no reminders needed)</p>
Instant Meetings	<ul style="list-style-type: none">• Quick connect• Ability to personalize the meeting ID

Q: What do my patients require to have a Zoom meeting?

- Access to internet (WiFi or Data)
- Smart Phone, Tablet, Computer
- Review Privacy Notice – Appendix A

CLINICAL GUIDELINES

Clinical Guidelines to having virtual appointments

The Essentials to Getting Started With Virtual Care:

- Review the guidelines for having a Zoom appointment in the Zoom manual
- Obtain patient email addresses and/or mobile numbers:
Email addresses can be used for communicating new virtual care services to groups of patients, and can be used for sending the virtual visit link/URL to a patient. Mobile numbers are useful for communicating with a patient if there are any issues with the virtual visit, or to ensure they are ready for their visit.
- Obtain patient verbal consent:

Verbal consent documented in the patient's chart is fine as a minimum. Patients should also be instructed to review the Privacy Notice that has been posted on the VCH website.

Example of a short privacy/consent statement you may want to use with your patient/client:

"Just like online shopping or email, Virtual Care has some inherent privacy and security risks that your health information may be intercepted or unintentionally disclosed. We want to make sure you understand this before we proceed. In order to improve privacy and confidentiality, you should also take steps to participate in this virtual care encounter in a private setting and should not use an employer's or someone else's computer/device as they may be able to access your information. If you want more information, please check the link the VCH website <http://www.vch.ca/your-care/virtual-health>. Are you okay to continue?"

Documentation of the patient consent:

Clinicians should be documenting the patient verbal consent in their documentation system (paper, Cerner, PARIS, etc.).

Example:

Informed verbal consent was obtained from this patient to communicate and provide care using virtual and other telecommunications tools. This patient has been explained the risks related to personal health information and steps they can take to help protect their information.

Virtual Visit Etiquette Tips:

- Introduce yourself
- Try to maintain eye contact with the camera (patient) during the visit
- Consider the space that the patient will view during a virtual visit.
- Consider clarifying your actions to the patient if you are not looking at them. E.g. typing up notes on the EMR.

AS A PROVIDER OR AN ASSISTANT BOOKING FOR A PROVIDER

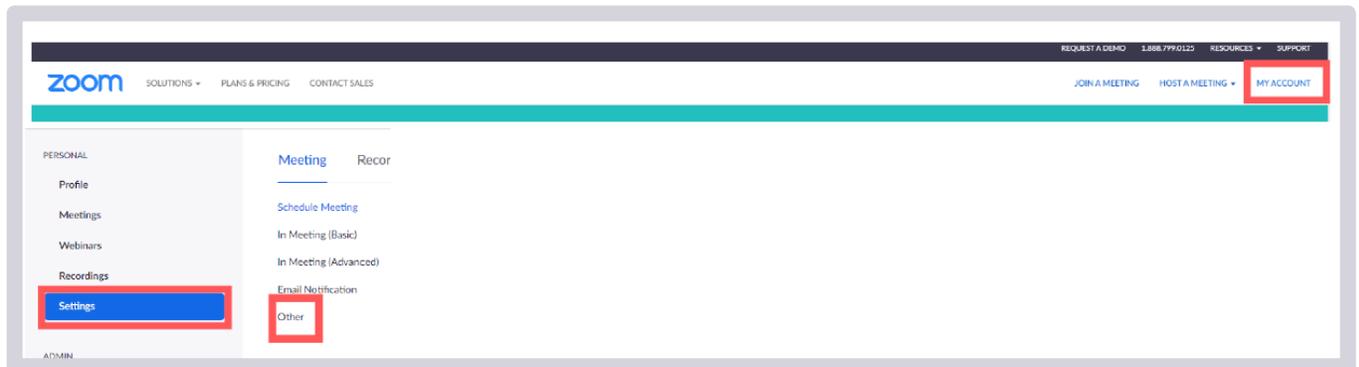


Assigning a Delegate to Book on Your Behalf

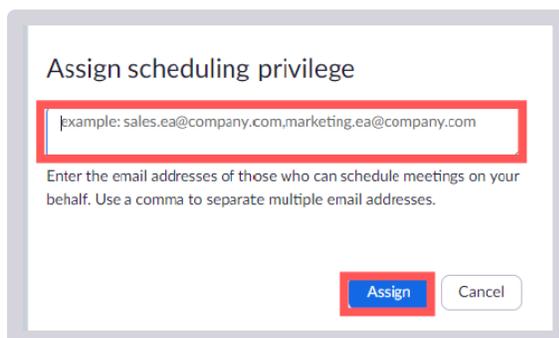
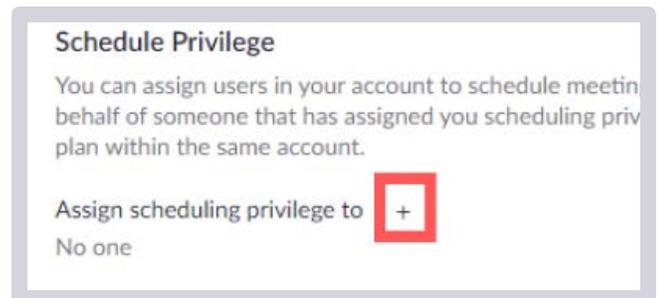
You can assign or delegate a user or multiple users in your account to schedule meetings on your behalf.

Log into your account at www.zoom.us

Click **'My Account'**. Then click **'Settings'** and **'Other'**.



Click on the **'Webinars'** tab. Schedule a new Webinar or book using an existing template.



Enter one or more email addresses in the window, separated by a comma. Then click **'Assign'**. *Note: anyone who is scheduling on your behalf will also need a Zoom license.

If the user was assigned successfully, they will appear under Assign Scheduling Privilege to. However, they will need to sign out of the Zoom Desktop Client and sign in again before they will be able to schedule for you there.

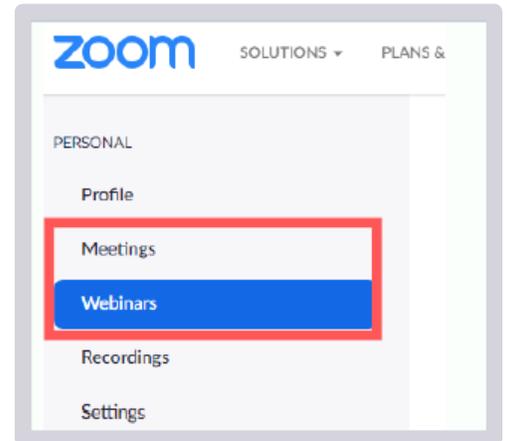
Scheduling an Appointment on Behalf of a Provider

Log into your account at www.zoom.us

Click the **'Webinars'** or **'Meetings'** tab.

Fill out details for the webinar or meeting. Before pressing **'Save'**, select the provider you would like to schedule for into the drop down menu.

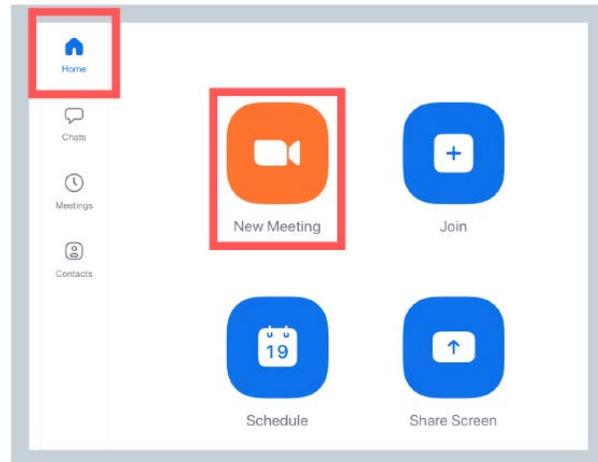
*Note: if you do not see them in the list, they will need to provide you access to book on their behalf (see Assigning a Delegate to Book on Your Behalf).



Press **'Save'**. Scroll down to the invitations section and press **'Copy the Invitation'**. Open up a calendar invitation in Outlook, paste the relevant information into the body and send to your patient/client.

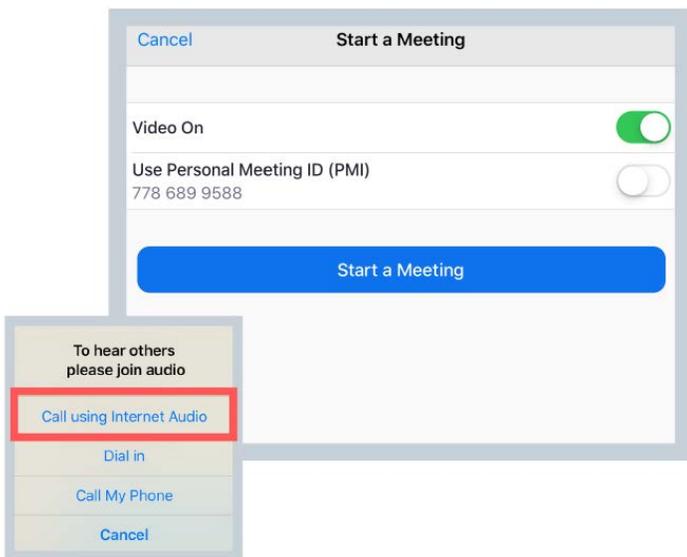
Starting an Instant Meeting

Using a mobile device or desktop application, open the Zoom app, sign in and select the 'Home' tab. Click the 'New Meeting' icon (for mobile) or 'Join with Video' icon (for desktop).

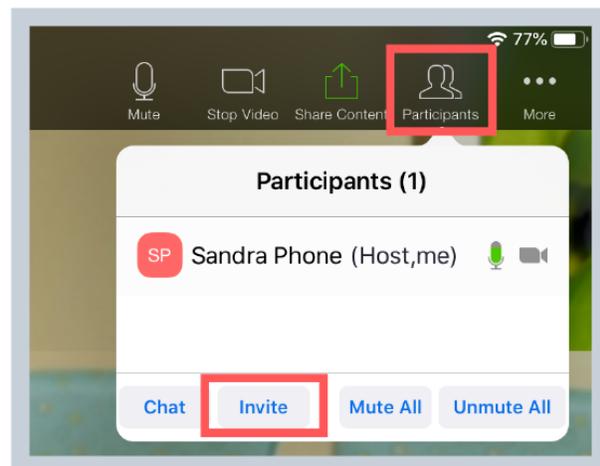


Ensure the 'Video On' option is active, and click 'Start a Meeting'.

Select 'Call using Internet Audio'.

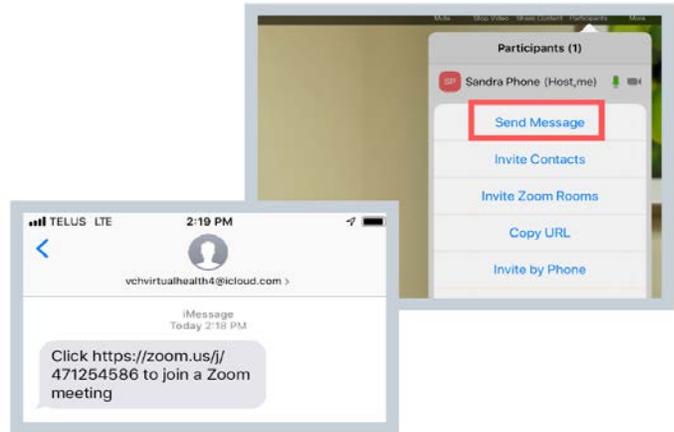


Select the 'Participants' button on the toolbar and click 'Invite'.



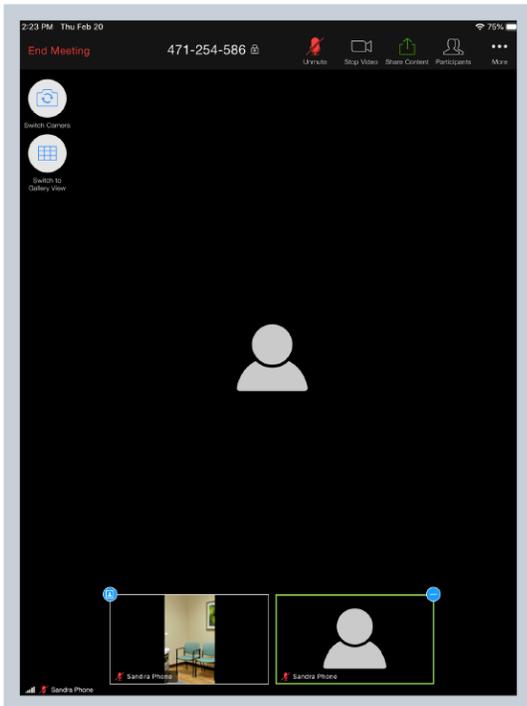
From the list, select **'Send Message'**. Enter the phone number of the person you would like to invite and click **'Send'**.

The invitee will receive a text with a link. They can enter the link into an internet browser to join.



When the invitee joins, you will automatically see their image appear.

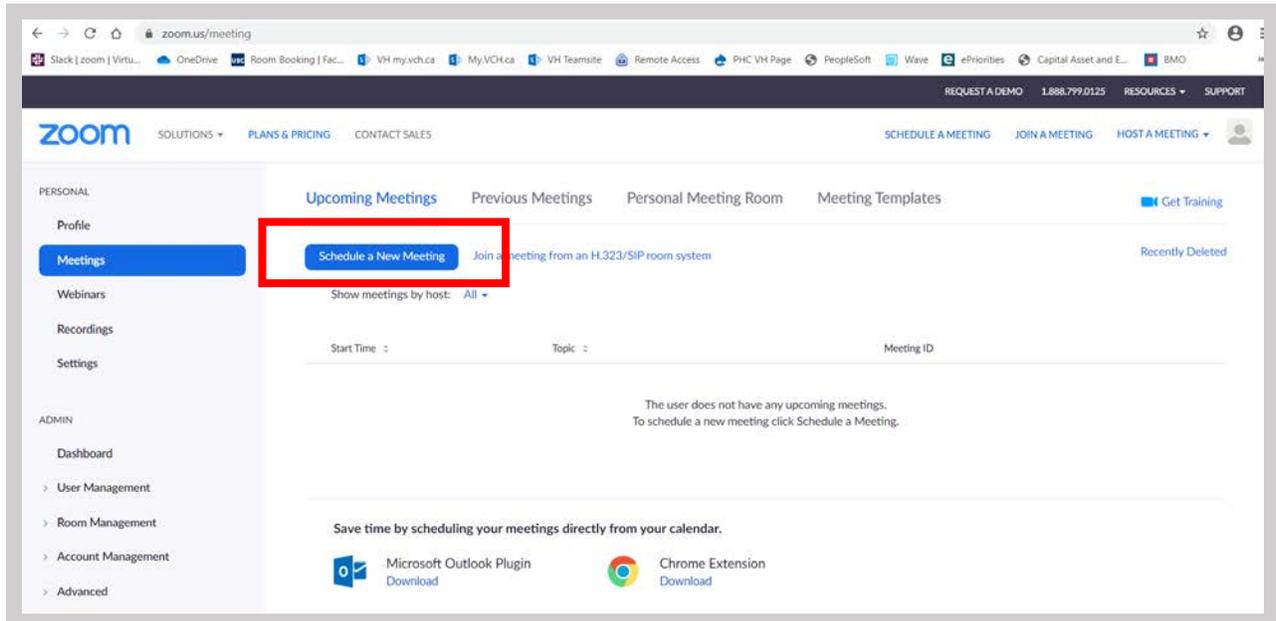
The toolbar shows your options (mute, turn the camera on, share content, add additional participants). To end the meeting select **'Leave Meeting'**.



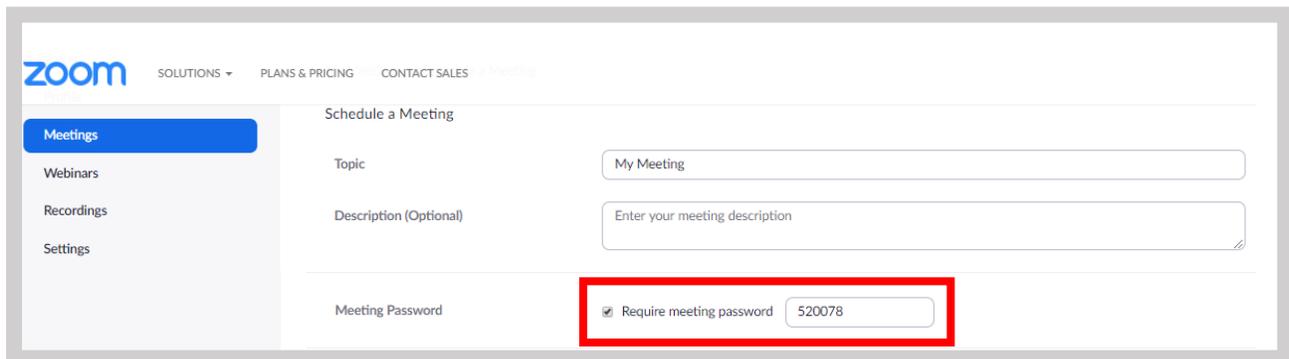
Scheduling a Meeting

Log into your account at www.zoom.us

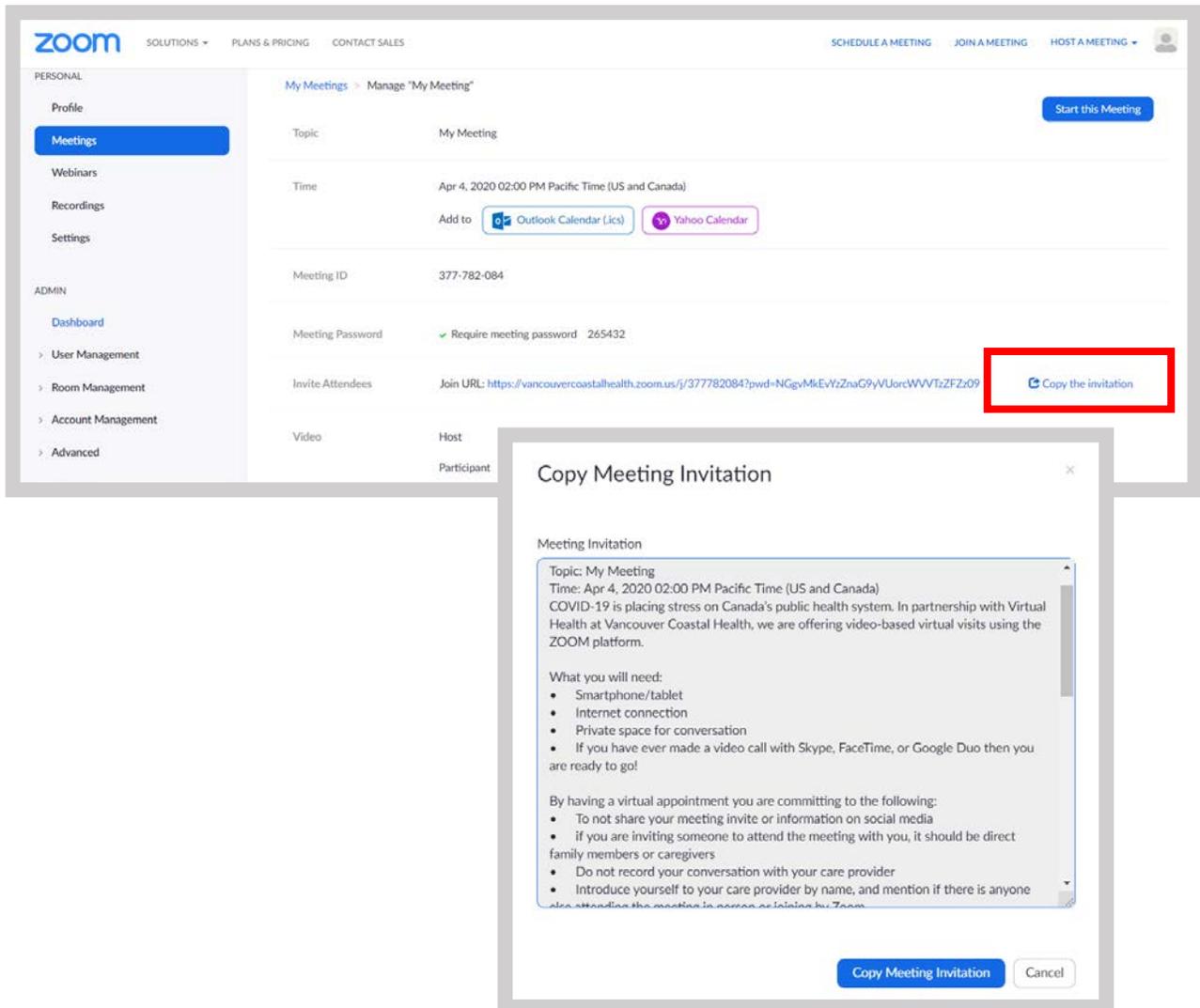
Click on the **'Meetings'** tab, and then **'Schedule a New Meeting'**.



Fill in the appropriate details, ensure that the **Require Meeting Password** option is checked, and click **'Save'**.



Copy the invitation: After you have filled out the details on the appointment, you are brought to a new page. Scroll down to find the invitations section and press **'Copy the Invitation'**. Open up a calendar invitation in Outlook, paste the relevant information into the body and send to your participants.



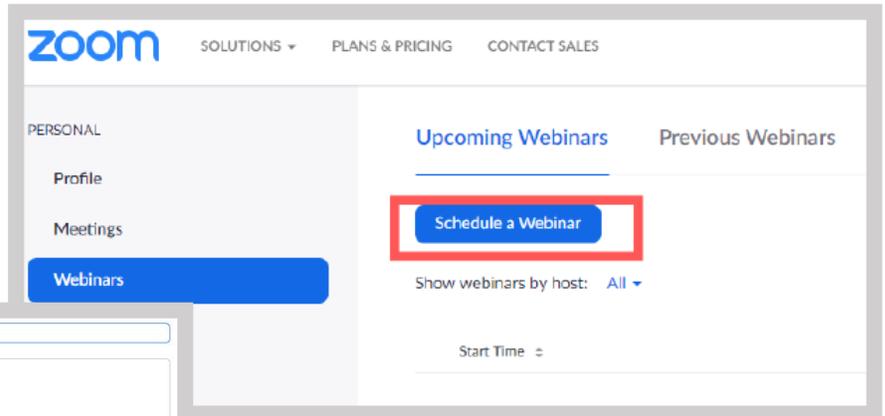
You can start the meeting using your mobile device, desktop application or web browser.

Scheduling an Appointment with Reminders

Log into your account at www.zoom.us

Click on the 'Webinars' tab.

To schedule a new webinar, click 'Schedule a Webinar'.



Topic: My Webinar

Description (Optional): Enter your webinar description

Use a template: Select a template

When: 04/17/2020 10:00 AM

Duration: 1 hr 0 min

Time Zone: (GMT-7:00) Pacific Time (US and Canada)

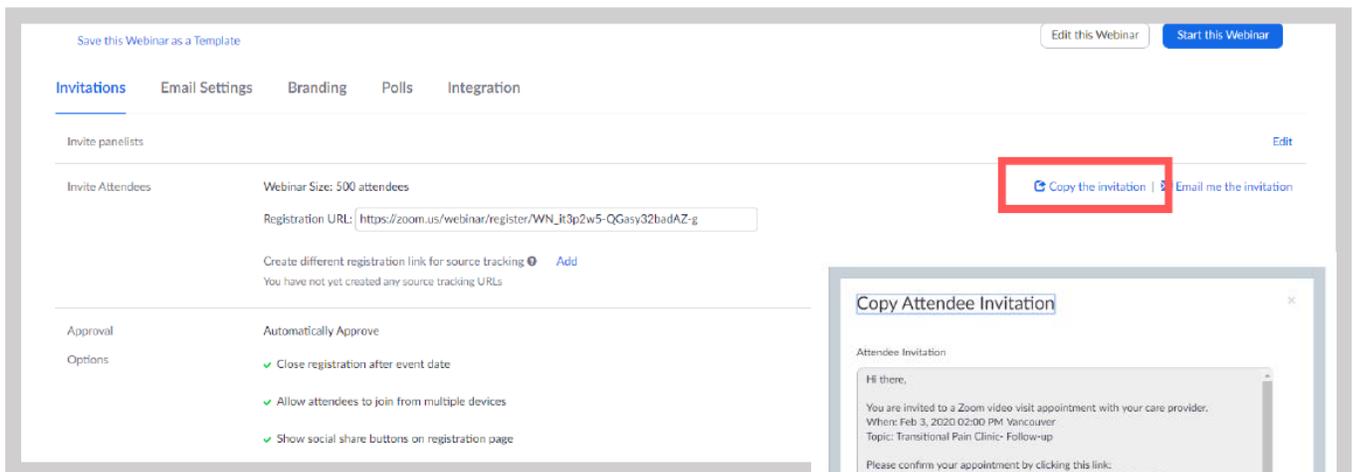
Recurring webinar

Registration: Required

Webinar Password: Require webinar password 090129

Fill in the appropriate details, ensure that the **Require Webinar Password** option is checked

After you have filled out the details on the appointment, you are brought to a new page. Scroll down to find the invitations section and click 'Copy the Invitation'.

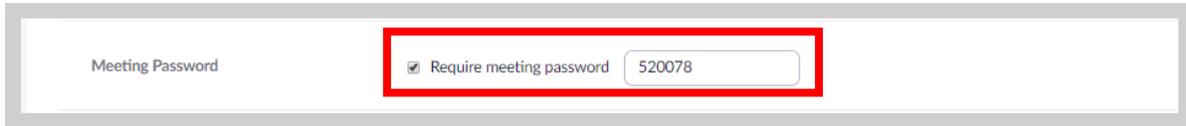


Email the zoom appointment information to the patient/client.

Setting Passwords

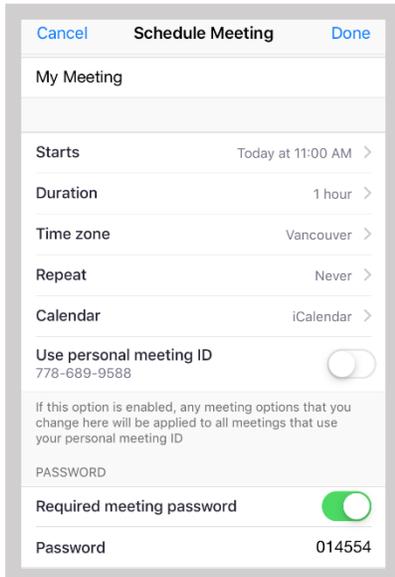
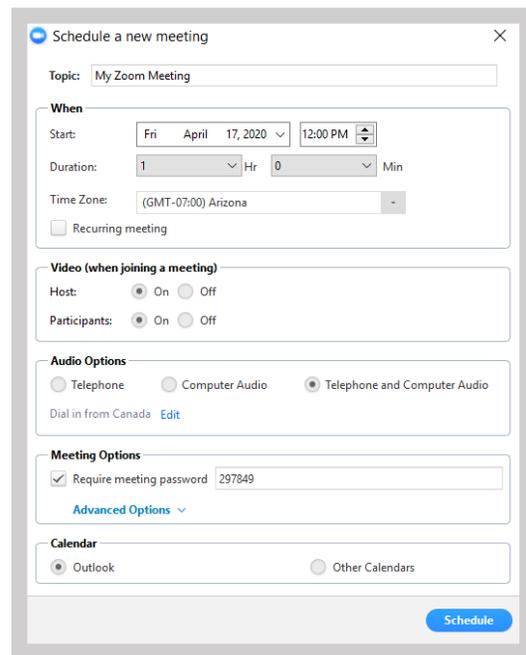
From the Web Portal:

Log into www.zoom.us. Click **'Schedule a Meeting'** or **'Schedule a Webinar'**. Fill in the appropriate fields and ensure that the **'Require Meeting Password'** box is checked. You can use the automatically generated password or enter a password of your choice.



From the Desktop Application:

Open the desktop application. Click **'Schedule'**. Fill in the appropriate fields and ensure that the **'Require Meeting Password'** box is checked. You can use the automatically generated password or enter a password of your choice.



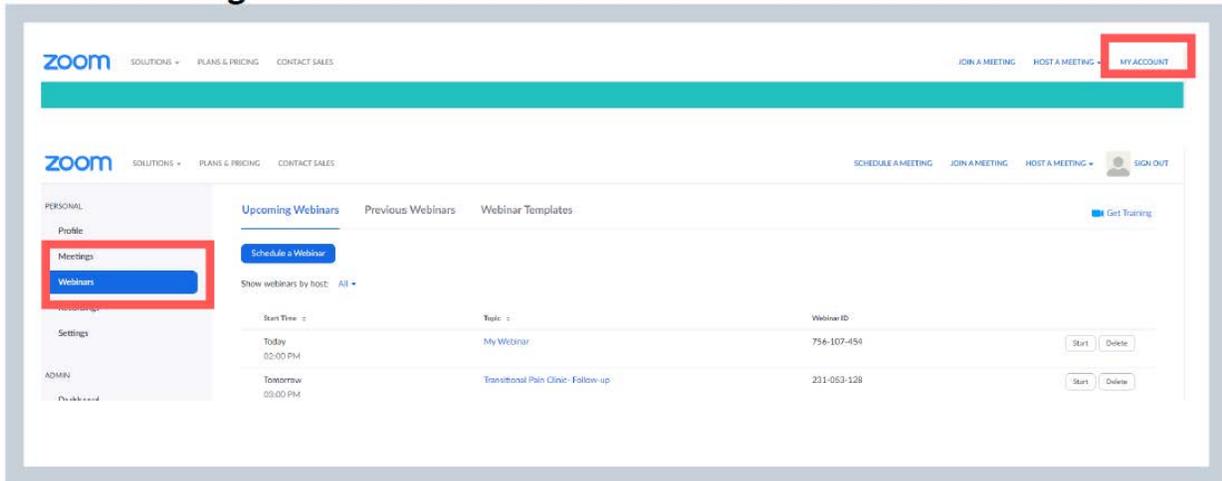
From a Mobile Device:

Open the Zoom app on your mobile device. Fill in the appropriate fields and ensure that the **'Require Meeting Password'** toggle is turned on. You can use the automatically generated password or enter a password of your choice.

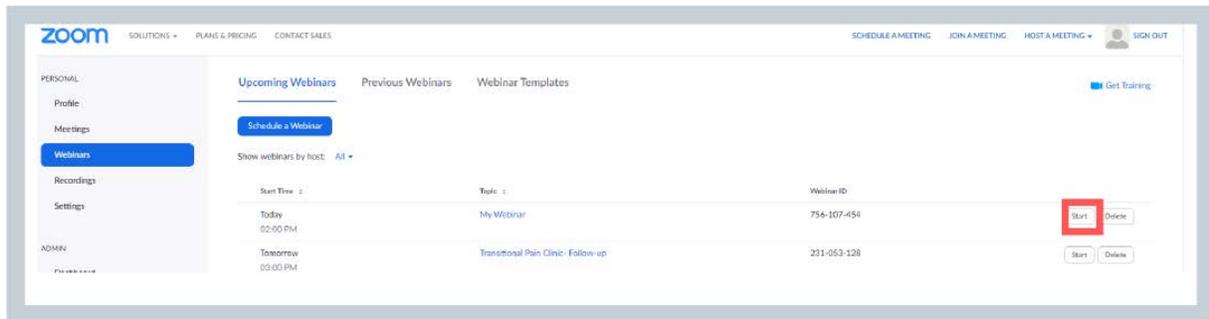
As the meeting host, you can start your scheduled meeting as usual. You will not be prompted to enter a meeting password.

Join a Meeting from a Computer

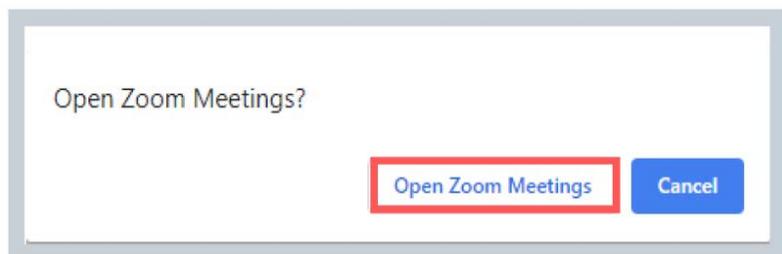
Open the Zoom website, sign in and select **'My Account'**. Then select **'Webinars'** or **'Meetings'**.



Find the appropriate meeting and select the **'Start'** button.

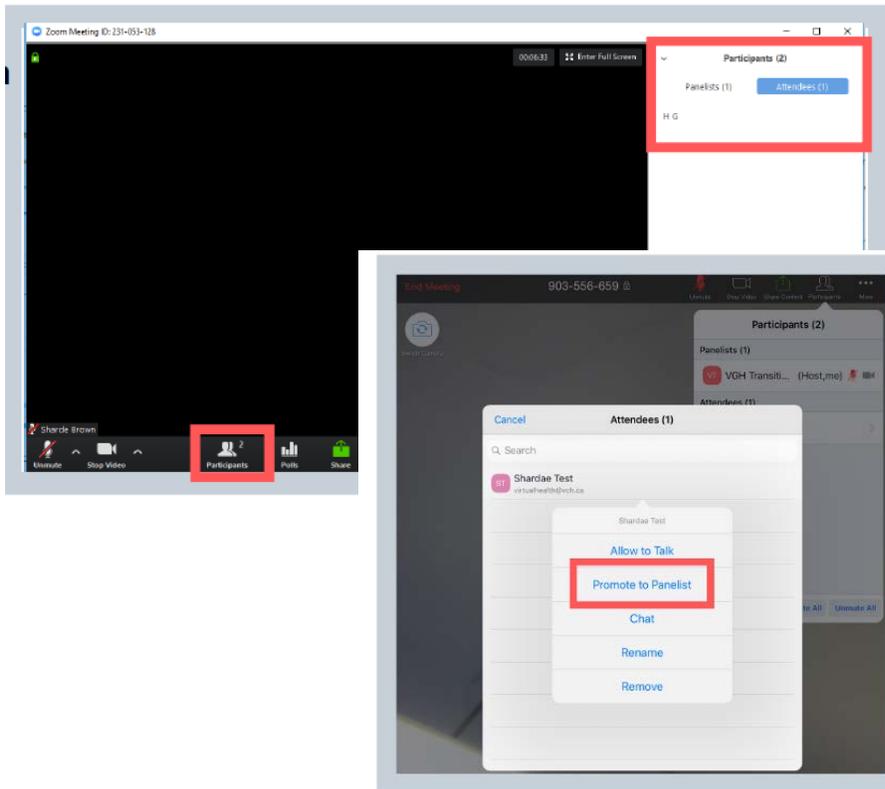
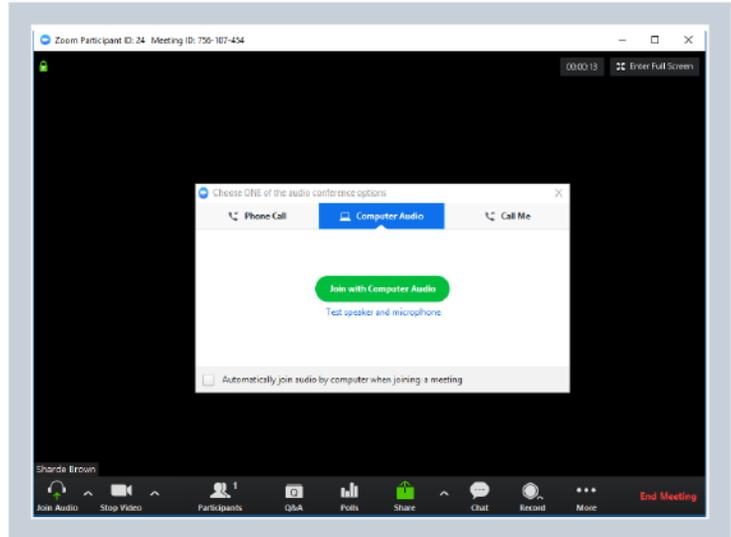


Select **'Open in Zoom Meeting'**.



Select the audio option you would like to join with, and ensure that your camera and microphone are turned on.

To admit the patient/client to the visit, select the 'Participants' button on the toolbar. Select 'Attendees'. Hover over the patient name. Select 'More'. Select 'Promote to Panelist'.



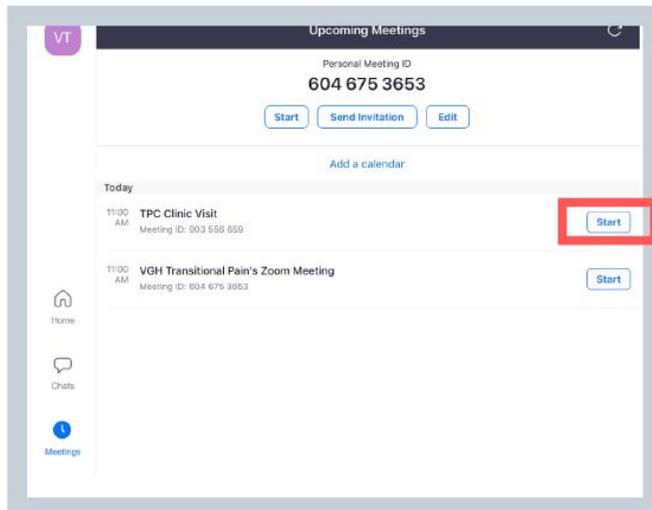
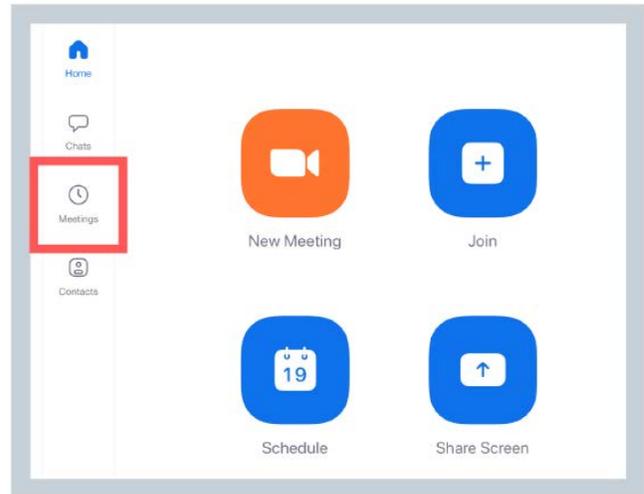
If you do not 'promote' the patient, their camera will not turn on.

The toolbar shows your options. You can click 'unmute' to speak or 'start video' to turn your camera on. You can end the meeting by selecting 'Leave Meeting'.



Join a Meeting from a Smartphone or Tablet

Open the Zoom app, sign in and select the **'meeting'** button.



Find the appropriate meeting and select the **'start'** button.

Select **'Call using Internet Audio'**. You should now be in the meeting.

The toolbar shows your options. You can click **'unmute'** to speak or **'start video'** to turn your camera on. You can end the meeting by selecting **'leave meeting'**.

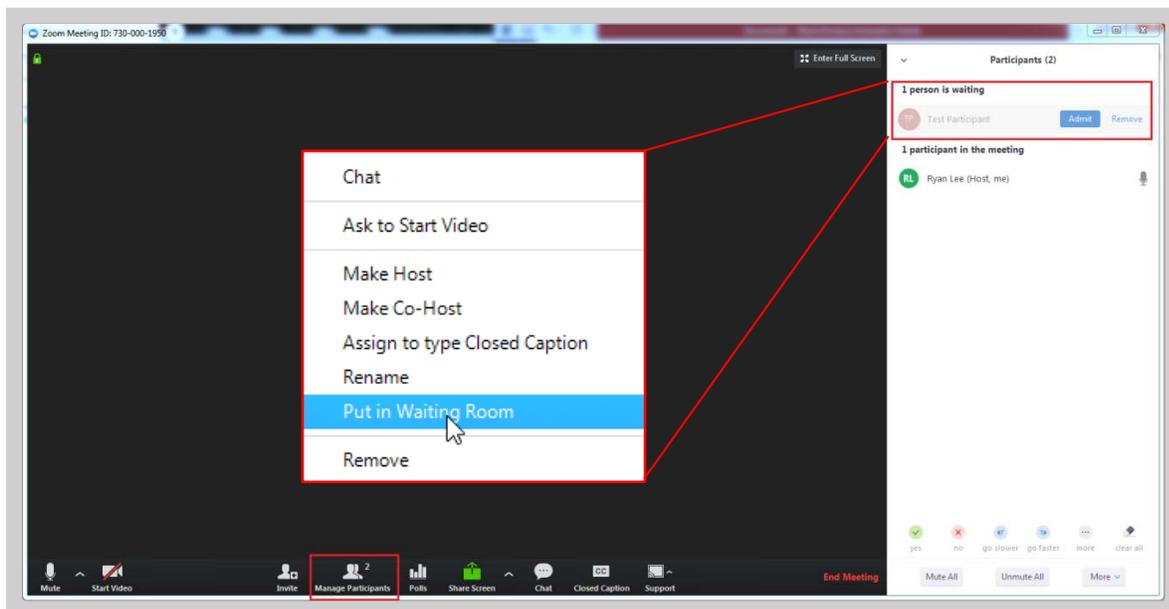


Waiting Room

The Waiting Room function is enabled for Zoom meetings (this is not available for webinars) and allows the host to admit or remove participants to/from the meeting.

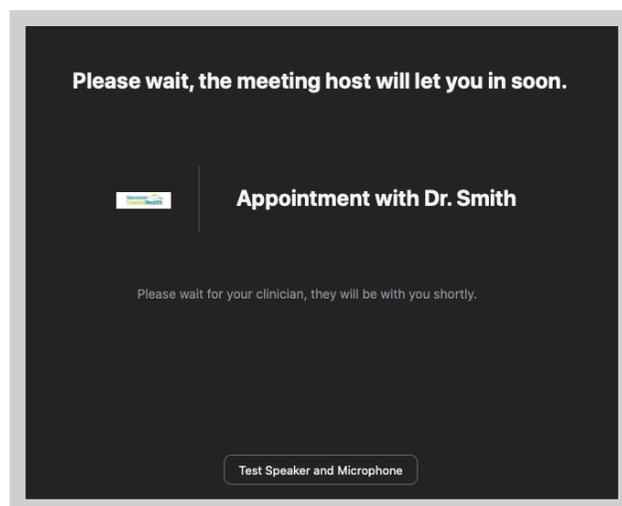
Admitting Participants into a meeting

As the meeting host, you will see the below once you start your meeting. Click on **'Manage Participants'**, select the participant from the list and click **'Admit'** the participants to allow them to join the meeting. The host also has the ability to put participants back into the waiting room by selecting the participant from the list and click **'Put in Waiting Room'**.



Participant view of the waiting room

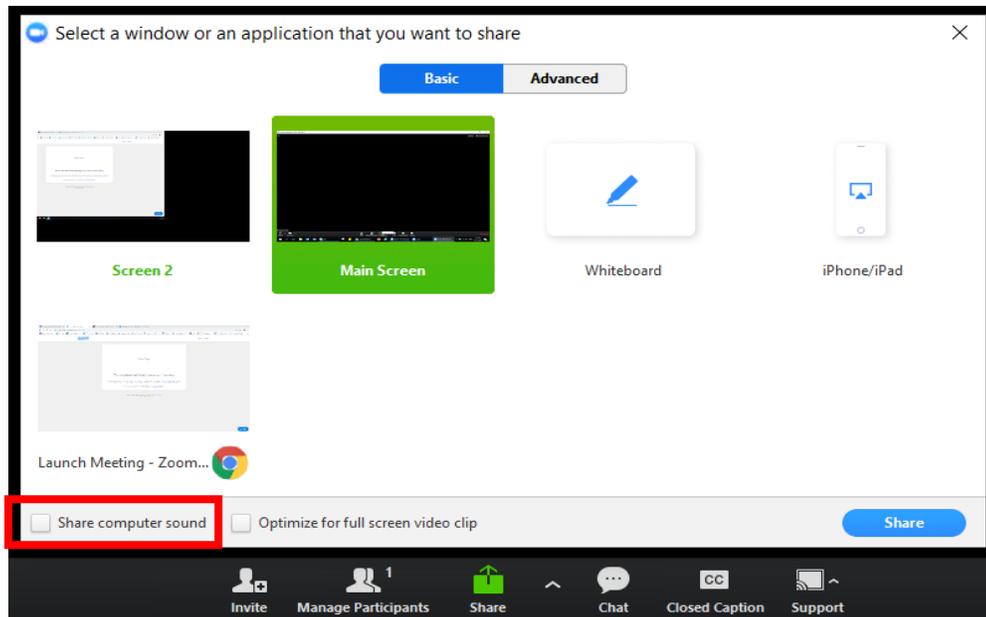
The participant will sit in a virtual waiting room until they are admitted into the meeting.



Screen Sharing

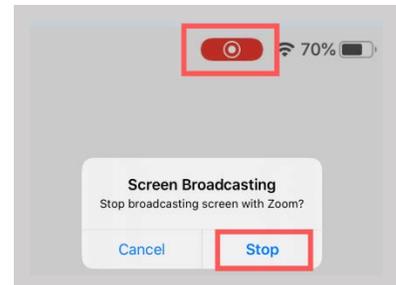
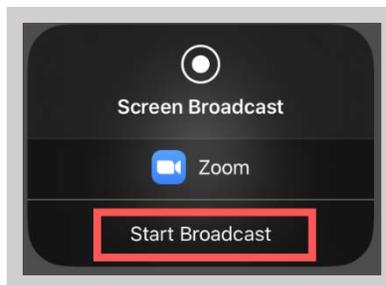
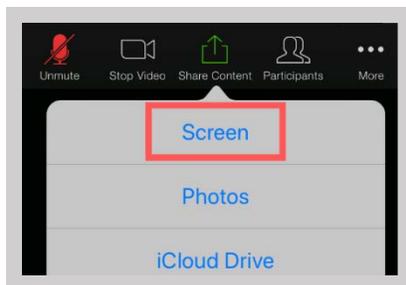
Share from a computer:

To share content during a meeting, click the green **'Share'** icon from the toolbar. Select the screen or application that you would like to share with the participants and click **'Share'**. Note: if you are sharing sound (ie. a video) be sure that the **'Share computer sound'** box located in the bottom left corner is checked off.



Screen share from a mobile device:

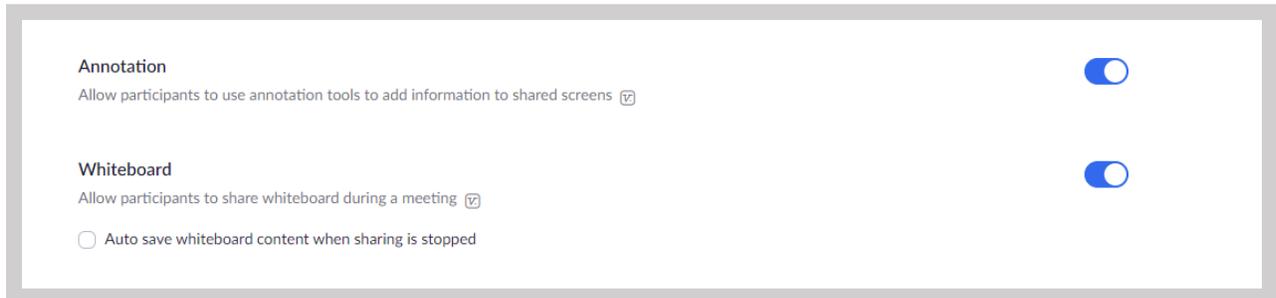
During the meeting, click the **'Share Content'** icon, and click **'Screen'**. Click **'Start Broadcast'**. Your screen and actions will be mirrored onto your participant's screen. To stop screen sharing, click the red button and the **'stop'** broadcasting.



Whiteboard and Annotation

Log into your account at www.zoom.us.

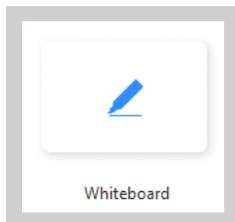
Click **'Settings'** in the navigation panel and scroll down to the Annotation and Whiteboard options on the Meeting tab. Ensure that the setting is enabled.



During the meeting click **'Share Screen'** on the tool bar.



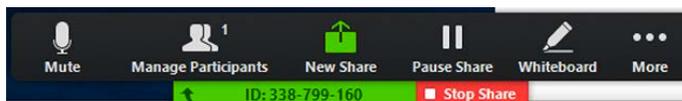
Click **'Whiteboard'** and then **'Share'**.



The annotation tools will appear automatically, but you can press the **'Whiteboard'** option in the meeting controls to show and hide them.



Other meeting participants will now be able to see your whiteboard and will be able to annotate.



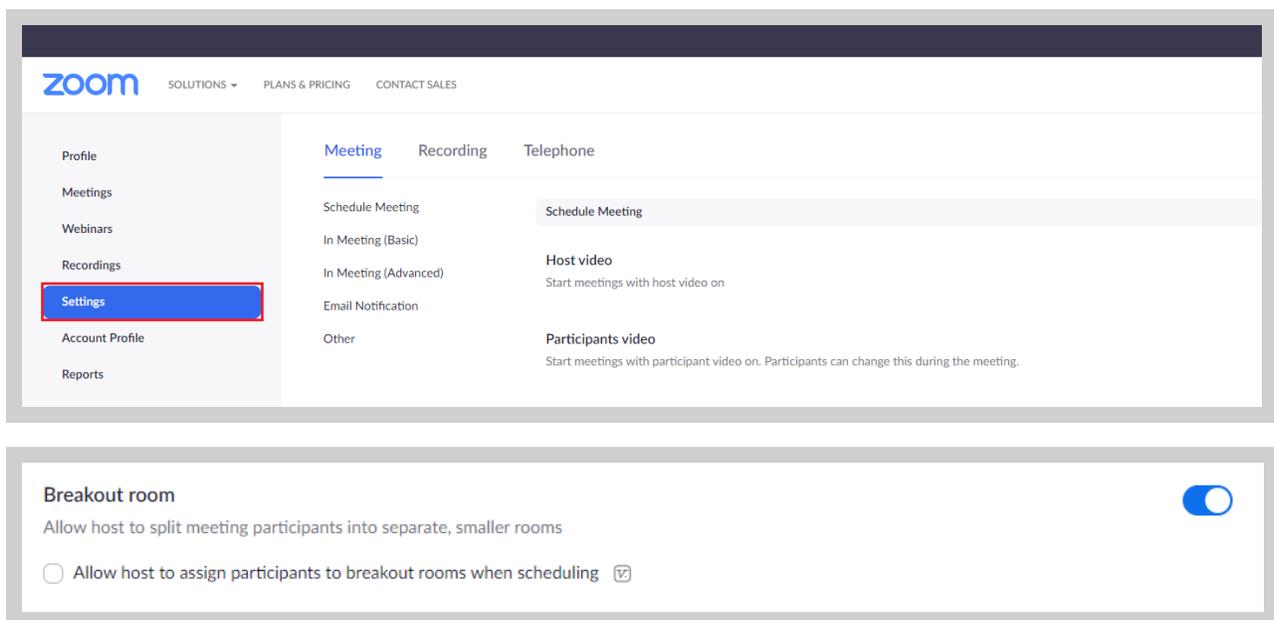
When you are done, click **'Stop Share'**

Breakout Rooms

Breakout rooms are sessions that are split off from the main Zoom meeting. They allow participants to meet in smaller groups. Breakout rooms can be used for collaboration and discussion of the meeting or for private discussions away from other meeting participants.

To enable the breakout room function, log into your account at www.zoom.us.

Click on 'Settings' in the navigational panel and scroll down to the Breakout Room option on the Meeting tab. Ensure that the setting is enabled.



To create a breakout room, start an instant or scheduled meeting.

Click 'Breakout Rooms' from the toolbar.



Select the number of rooms you would like to create and how you would like to assign your participants:

- Automatically – Let Zoom split up your participants evenly into each of the rooms
- Manually – You choose which participants you would like in each room

Then click 'Create'

Create Breakout Rooms

Assign 0 participants into Rooms.

0 participants per room

Distribution

Automatically Manually

Your rooms will be created but will not start automatically. You can manage the rooms prior to starting them by following the instructions below.

Options for a Breakout Room

After creating the breakout rooms, click '**Options**' to view additional breakout room options.

Move all participants into Breakout Rooms automatically

Allow participants to return to the main session at any time

Breakout Rooms close automatically after: minutes

Notify me when the time is up

Countdown after closing breakout room

Set countdown timer: seconds

Options ^ Recreate ^

Check any options that you would like to use in your breakout rooms.

- Move all participants into Breakout Rooms automatically – This will move all participants into the breakout rooms automatically. If this option is not checked, the participants will need to click 'Join' to be added to the breakout room.

- Allow participants to return to the main session at any time – If this is checked, participants can move back to the main session from their meeting controls. If this is disabled, they need to wait for the host to end the breakout rooms.
- Breakout rooms close automatically after x minutes – If this is checked, the breakout rooms will automatically end after the configured time.
- Notify me when time is up – If this is checked, the host will be notified when the breakout room time is up.
- Countdown after closing breakout rooms – If this is checked, the participants will be given a countdown of how much time they have left before being returned to the main room.

Follow the steps below to assign participants to rooms or click **‘Open All Rooms’** to start the breakout rooms.

Assigning Participants to Rooms

To assign participants to your room, select **‘Assign’** next to the room you wish to assign participants to and select participants you want to assign to that room. Repeat this for each room.



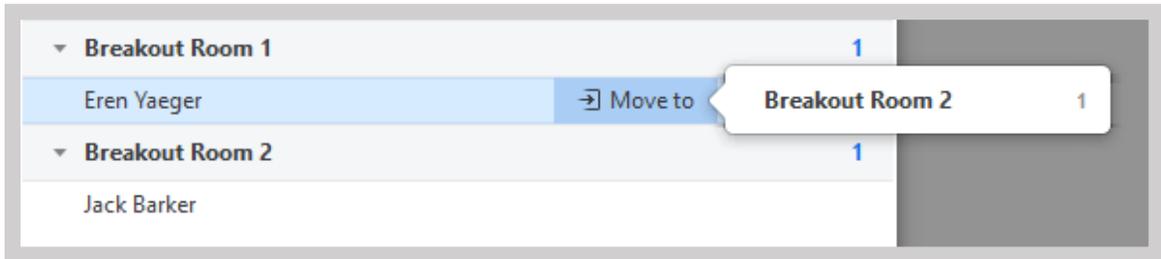
Once a participant has been assigned (manually or automatically), the number of participants will show in place of the Assign button.



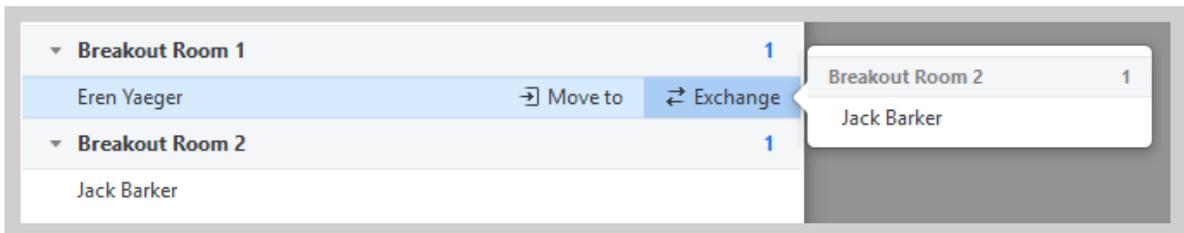
Preparing Breakout Rooms

After manually or automatically assigning participants to rooms, you can rearrange the participants. Participants who are not assigned to breakout sessions will remain in the main meeting when the rooms are started.

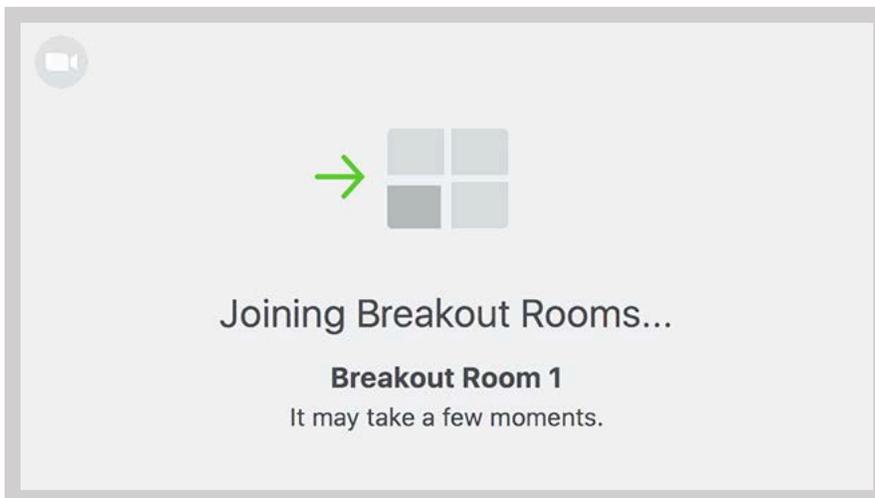
- Move to (participant): Select a room to move the participant to.



- Exchange (participant): Select a participant in another room to swap the selected participant with.



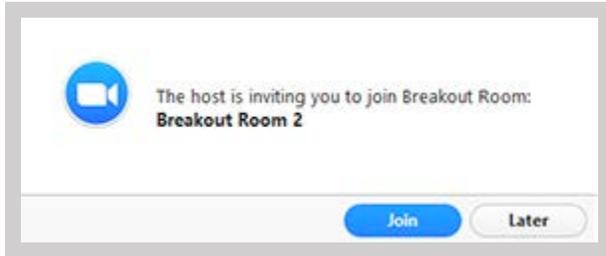
- Delete Room: Delete the selected room.
- Recreate: Deletes existing breakout rooms and creates new ones.
- Add a Room: Add another breakout room.
- Open All Rooms: Start the rooms. All participants will be moved to their respective rooms after confirming the prompt to join the breakout room. The host will be left in the main meeting until manually joining one of the rooms. The participants (and the host when manually joining a room) will see the following message shown when joining the breakout room.



Joining a Breakout Room

The host will need to invite you to join the breakout room

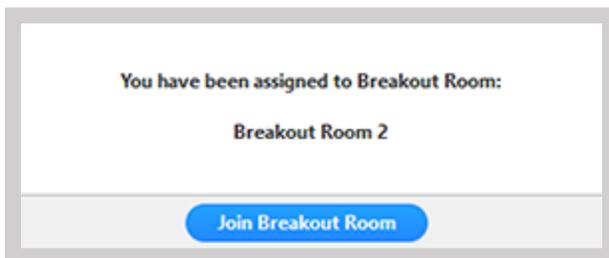
Click **'Join'**



If you choose Later, you can join by clicking the **Breakout Rooms** option in your meeting controls



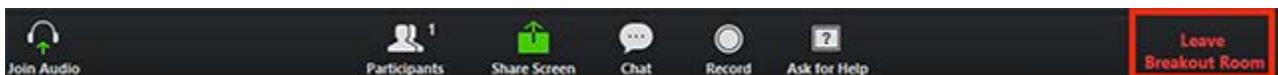
Click **'Join Breakout Room'**



Leaving the Breakout Room

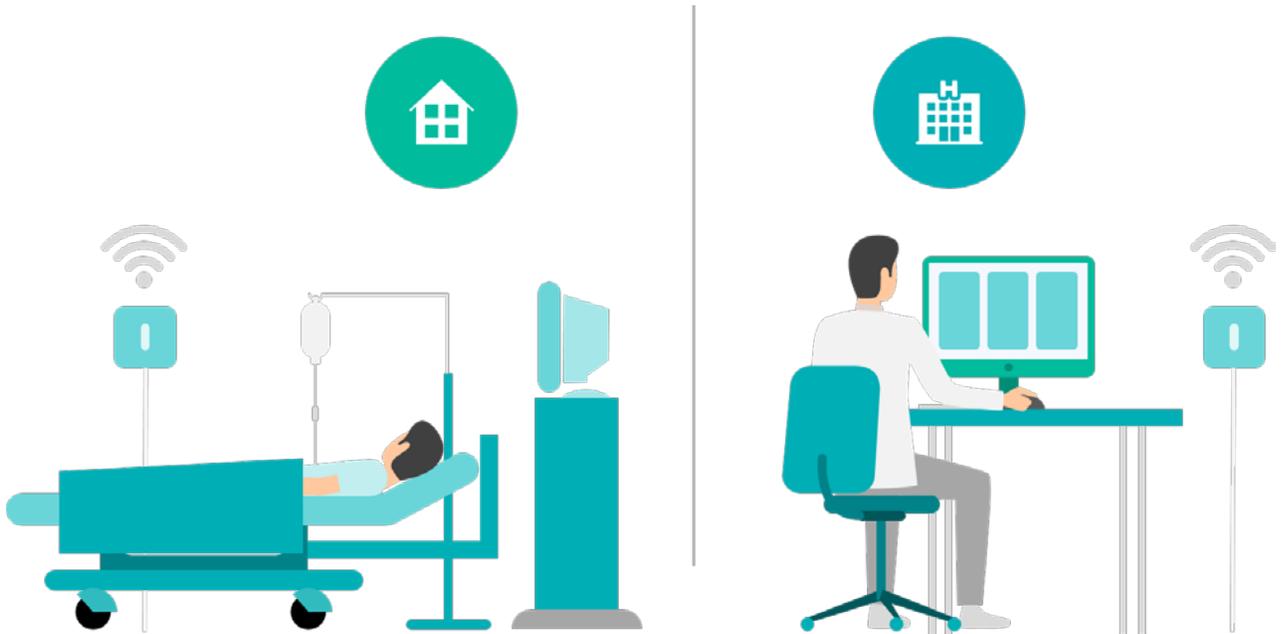
You can leave the breakout room and return to the main meeting session at any time, or you can leave the meeting entirely from the breakout room.

Click **'Leave Breakout Room'**



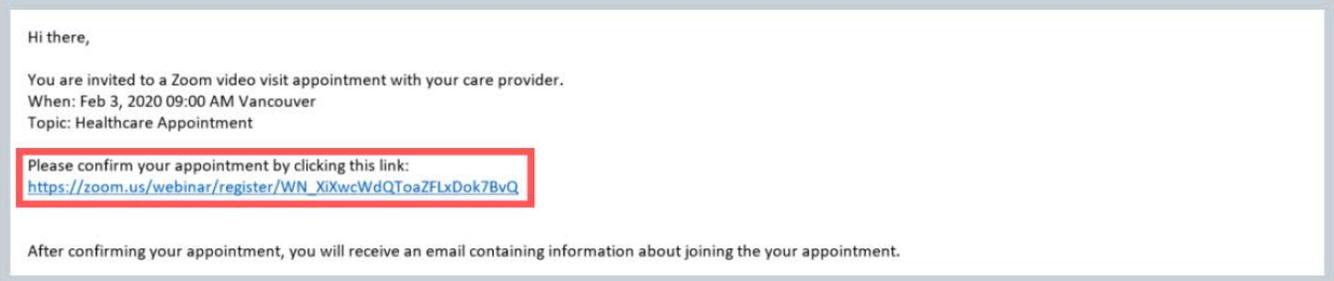
Choose if you want to leave the breakout room or the entire meeting

AS A PATIENT/CLIENT



Confirming Your Appointment

You will receive an email from your healthcare provider to confirm your appointment. When you open the email, you will see a link and follow the instructions



Enter your information

Webinar Registration



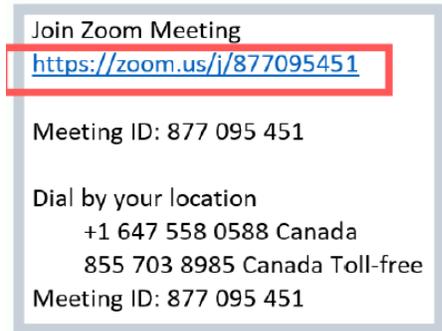
Topic	Clinic Visit	
Description	Please download the Zoom App and/or web browser before your first appointment. You can test your settings by clicking this link: https://zoom.us/test If you have any questions/concerns please call the clinic at : 604-675-XXXX	
Time	Feb 3, 2020 10:00 AM in Vancouver	

* Required information

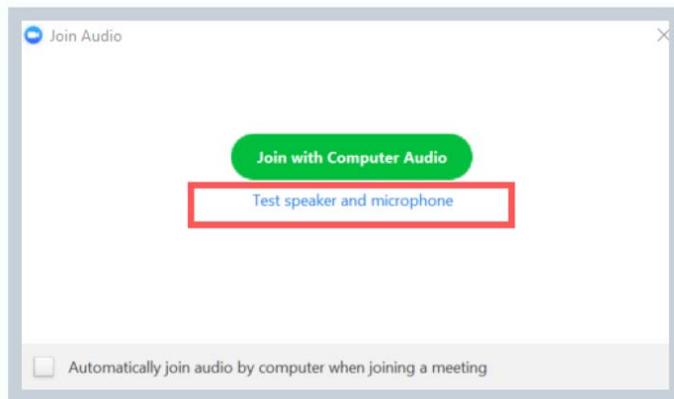
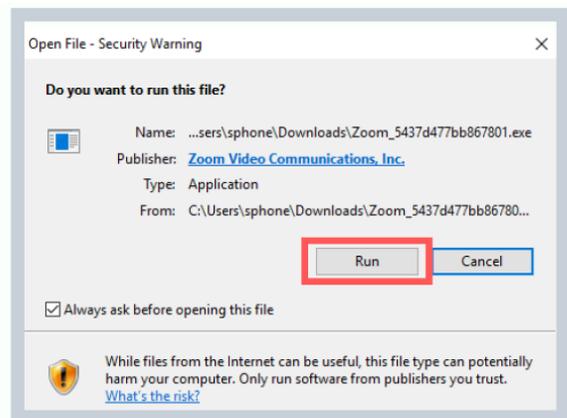
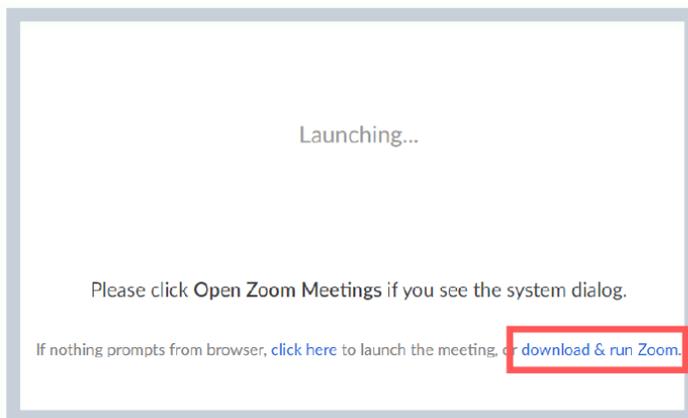
First Name *	Last Name *
<input type="text"/>	<input type="text"/>
Email Address *	Confirm Email Address *
<input type="text"/>	<input type="text"/>

Join a Meeting from a Computer

Option 1 to join: You will receive an email from your healthcare provider. When you open the email, you will see a link to the Zoom meeting. Click the **'Join Zoom Meeting'** link.



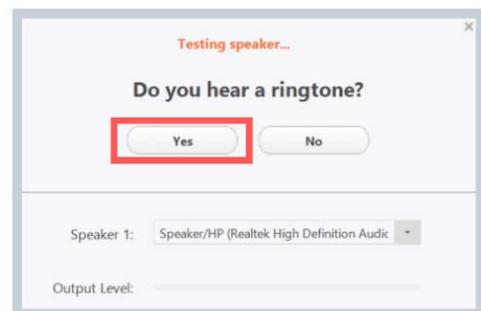
You may be prompted to download and run the program.



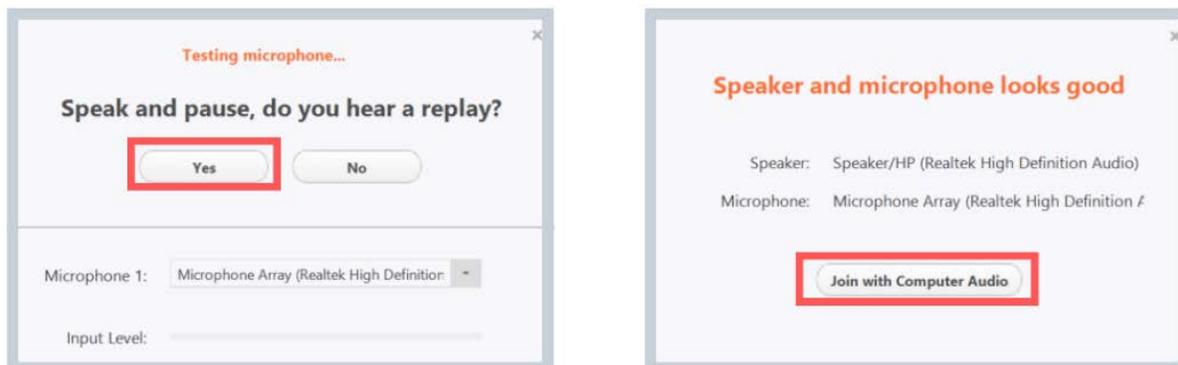
Select the **'Computer Audio'** tab and click **'Test speaker and microphone'**.

Note: if the speakers and microphone do not work for you, please skip to the **'to join by phone'** instructions.

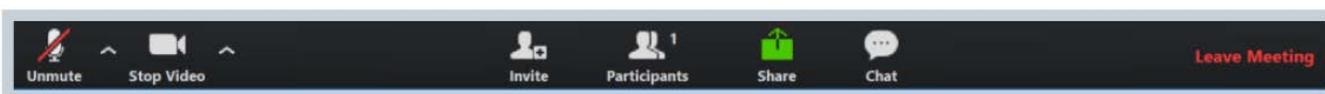
You will see a screen that asks if you hear a ringtone. Ensure that your volume is turned up. When you are able to hear the ringtone, click **'Yes'**.



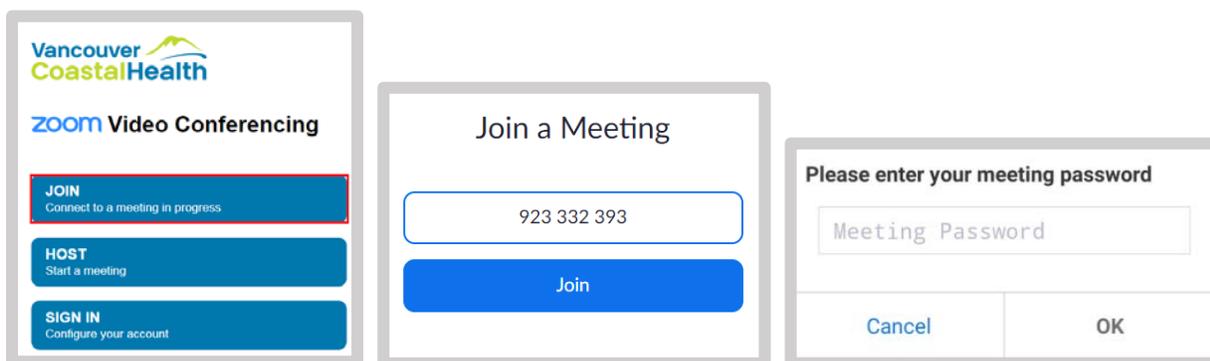
You will see a screen that instructs you to speak. If you hear the replay, click **'Yes'**. You will now see a screen that confirms your speaker and microphone are set up. Click **'Join with Computer Audio'**.



The toolbar shows your options. You can click **'unmute'** to speak or **'start video'** to turn your camera on. *Note: if you are unable to get your computer speakers and microphone set up, or if the sound quality is not great, you can join the meeting by phone.

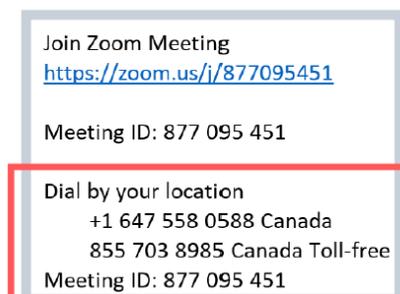


Option 2 to join: visit www.vancouvercoastalhealth.zoom.us and click **'Join'**. Enter the meeting ID provided by your clinician and click **'Join'**. You will be prompted to enter a meeting password also provided by your clinician. Click **'OK'**.



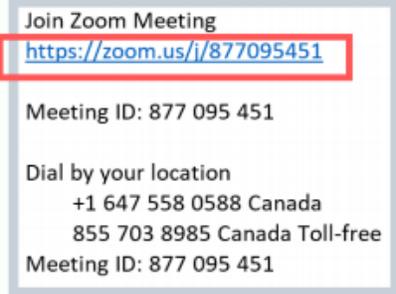
To join by phone:

Open the incoming email from your healthcare provider. When you open the email, you will see dial-n phone numbers and a meeting ID. Dial the Canadian phone number and enter the meeting ID to join the meeting.

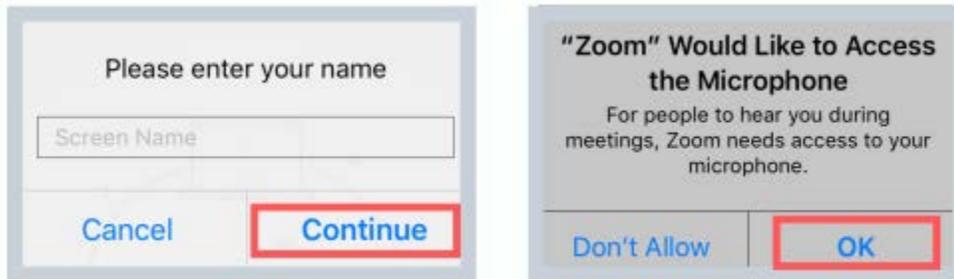


Join a Meeting from a Smart Phone or Tablet

You will receive an email from your healthcare provider. When you open the email you will see a link to the Zoom meeting. Click the 'Join Zoom Meeting' link.



A pop up will appear asking you to enter your name. This name will appear on the healthcare provider's screen so that they are aware who has joined the meeting. Enter your name and click 'continue'. Another pop up will ask to access you microphone, click 'OK'.



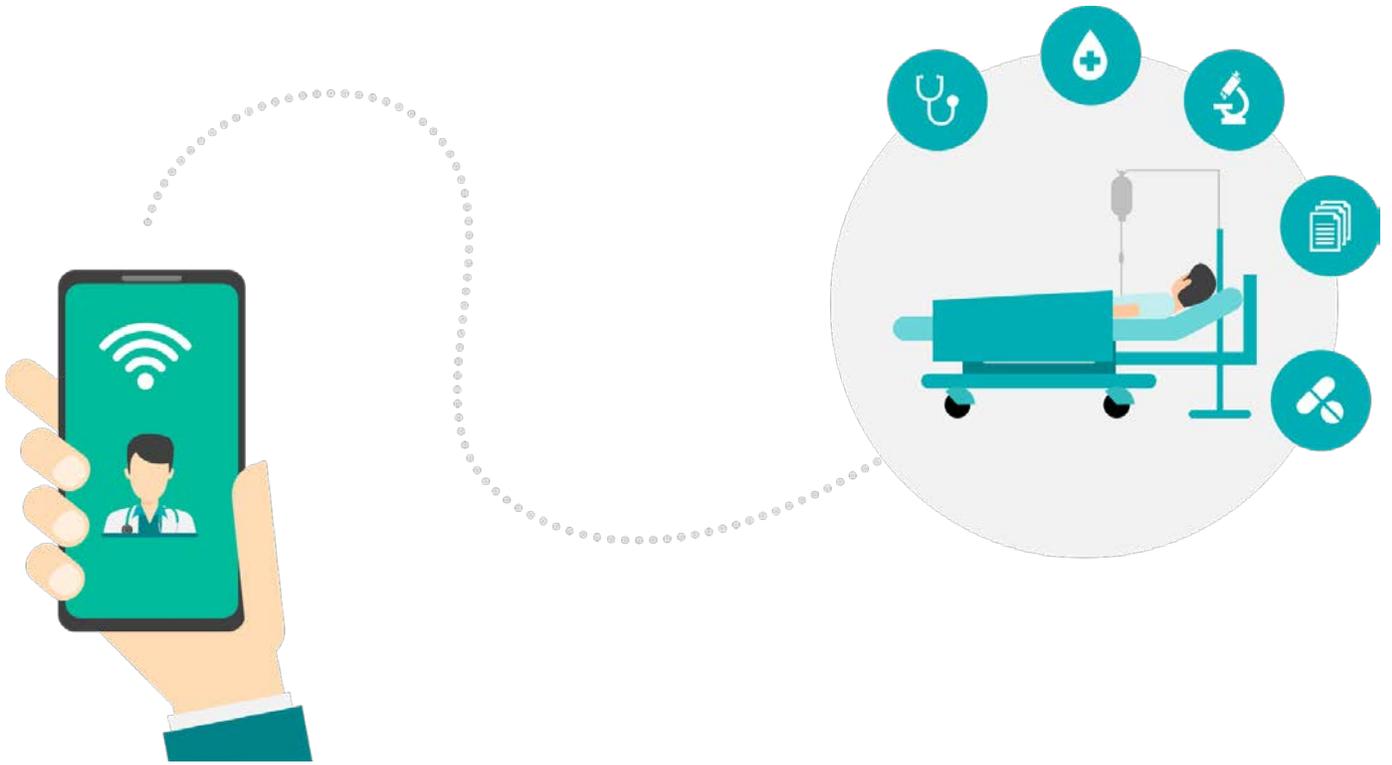
You will see a screen that gives you options to join the meeting. Select 'Call using internet audio'. You should now see a large image from the healthcare provider's camera in the middle of the screen, and a small image from your camera in the corner.



Touch the screen for the toolbar to appear. You can click 'unmute' to speak or 'start video' to turn your camera on. To leave the meeting, click the 'leave meeting' button.



APPENDIX



Appendix A – Guidelines

These Zoom Guidelines must be used by Vancouver Coastal Health (VCH) staff and physicians when communicating by video conference with clients, patients or residents; family members or representatives; other care providers; and/or staff members; and in conjunction with the [VCH / PHC External Telehealth Videoconferencing policy](#), [VCH / PHC Emailing policy](#) and [the Province of BC Health Authorities Telehealth Clinical Guidelines](#).

NOTE: For the purposes of these guidelines, “clients, patients, or residents” also includes their family members or representative.

If you have any questions regarding the information in these guidelines, contact:

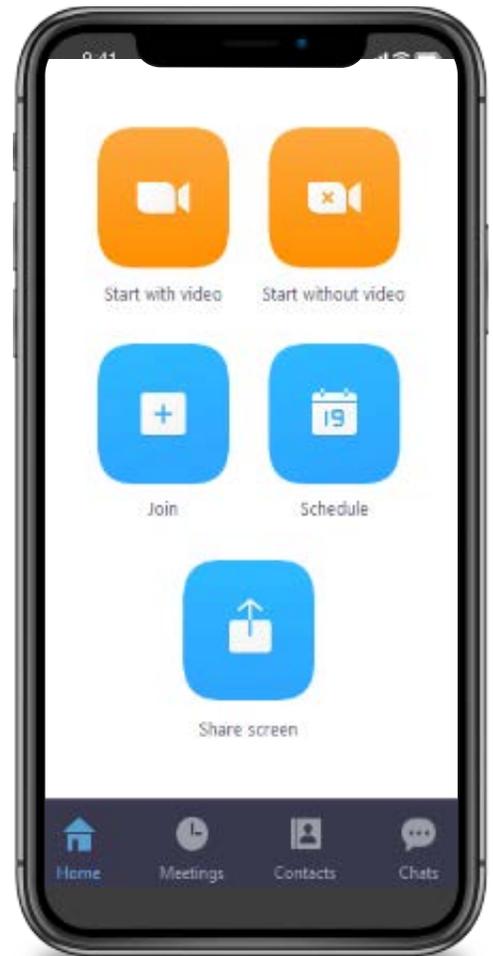
- PHC Information Privacy Office: (604) 806-8336 or privacy@providencehealth.bc.ca
- VCH Information Privacy Office: (604) 875-5568 or privacy@vch.ca

General Guidelines:

Zoom should only be used for appropriate clinical scenarios, when the clinical interaction does not require physical examination or the application of peripheral diagnostic equipment. Appropriate scenarios will be defined by each clinical program area.

Notify the client, patient or resident of the risks of using Zoom prior to any video conference communication (Notice: Using Zoom to Communicate with your Health Care Provider). Limit Zoom communications to information necessary for the effective provision of care within a videoconferencing environment.

Document any clinically significant information in the Client, Patient or Resident’s chart, as you would in a face-to-face or other Telehealth consultation. Report any actual or potential privacy breaches associated with Zoom to the VCH Information Privacy Office, as per [IM 342: Reporting and Management of Information Privacy Breaches](#).



Staff Guidelines for setting up and using Zoom:

- Ensure the client, patient or resident email address, which is required to initiate a Zoom videoconference, is collected and stored in a secure fashion, ideally within the client, patient or resident's chart or electronic health record.
- Authenticate the owner of the email address. This may be accomplished by:
 - Sending an initial email to confirm the right person is being contacted prior to sending the videoconference invite or any personal information, or
 - Asking the client, patient or resident to verify a piece of information that only they would know (i.e. date of birth, date of last appointment, middle name, etc.) by text or phone.
- **Do not record the Zoom clinical interaction.** In cases where video recording is necessary, contact the Privacy Office for a privacy review.
- When you initiate the call, inform/introduce the individual to all those participating in the call.
- Screen sharing is a function of Zoom. Ensure all other programs such as Microsoft Outlook email/calendar and other documents that may contain personal or confidential information are closed before initiating screen sharing.

Prior to Communicating via Zoom:

- Discuss the specific clinical purposes for the Zoom videoconference(s) with all parties.
- Gather the necessary information (email address) to connect with the individual.
- Communicate the common risks of Zoom communications and provide client(s), patient(s), and resident(s) with the Notice: Using Zoom to Communicate with your Health Care Provider form via email.
- Confirm with the client, patient or resident that they have read the notice and would like to proceed with Zoom video conferencing.
- Inform the client, patient or resident when the Zoom interaction will occur or how a session will be scheduled.
- Schedule and send the meeting invitation to the client, patient or resident confirming the date and time of the Zoom interaction.

See appendix B – Patient Notice of Video Appointment

Appendix B – Patient Notice of Video Appointment

Dear Patient,

Vancouver Coastal Health (VCH) is working hard to provide patients with opportunities to have convenient and reliable access to healthcare services. In our review, we have determined that you are a good candidate for a video visit for your appointment. Please let us know if you prefer to have an in-person hospital visit.



To be successful in having a video visit, you will need the following equipment:

- ✓ Email
- ✓ Tablet, smart phone or computer
- ✓ Access to Wi-Fi internet
- ✓ A private space for your conversation

If you do not have this equipment, you may prefer to come into an office or hospital to meet with your healthcare provider.

In accordance with the Freedom of Information and Protection of Privacy Act, we will collect the personal information to confirm your identity and enable you to access virtual health visits. We may send you the registration invitations, appointment reminder notifications, and survey links to the email address you provided to us. We will only send information to the personal webmail address which you have provided to us. All of the information which you provide to us, including information about the care you receive, will be kept completely confidential.

Our intention is to improve your access to healthcare services through the use of technology and improve your overall healthcare experience. We realize that with the use of new technologies, things may not always go to plan. We are committed to assisting you through this process.

More information regarding privacy/security can be provided on request. If you have any questions or concerns about your appointment or would prefer to book an in person visit, please inform us when we call you to book your appointment.

Using a Video Appointment to Communicate with your Health Care Provider

Vancouver Coastal Health (VCH) staff and physicians are committed to making care easy for you while protecting your privacy. We are using video appointment technology called Zoom, which can come with some risks or limitations.

What you need to know:

- We want the technology to be successful and simple to use. If it's not, please let us know.
- Sometimes, a video appointment isn't appropriate for care. We will only offer this type of visit if we think it is a good option for you.
- You do not have to have a video appointment, if you prefer to meet in person, let us know.
- Sometimes technology does not work, and there could be unexpected problems. We will do everything in our power to minimize a problem with technology.
- If for any reason the technology does not work, your team will arrange an alternative appointment.
- All the rules that apply to the practice of medicine in the province of BC apply to the use of technology and video appointments (e.g. documentation in the health record).
- Your care team will inform you if any other person(s) can hear or see any part of the conversation before the session begins.
- For your video appointment, you will need suitable Wi-Fi or network access. VCH cannot cover any data service costs associated with video appointments. Please note that Wi-Fi networks in public spaces (e.g. coffee shops) may be unsecure.
- Although security measures such as encryption is used to safeguard communications, "perfect security" does not exist on the internet and VCH cannot guarantee the security of the information you share over the internet.
- Like other mobile applications, the Zoom application requires permissions to access content on your phone to function. For example, permission to access the camera and microphone enables users to have the video appointment.

Contact Information

We welcome your comments and questions regarding video appointments between patients and VCH care providers. If you have questions regarding privacy or security, please contact us at the following:

[VCH Information Privacy Office](#)

Phone: (604) 875-5568

Email: privacy@vch.ca

Appendix C – Resources

Zoom Support

- Getting Started
- Audio, Video, Sharing
- Meetings & Webinars
- Zoom Phone

Zoom Web Portal

- [Zoom FAQ](#)
- [Zoom Video Tutorials](#)
- Live Tutorials

Virtual Health- Intranet

- Manual
- License Requests
- Guidelines, Patient Notice

