Technical Guide

ZOOM FOR HEALTHCARE

Version 2
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Health PEI
One Island Health System

Prince Edward Island
CANADA

TECHNICAL GUIDE: ZOOM FOR HEALTHCARE

Table of Contents

TAKE NOTE: As health-care providers use this technology and provide feedback on their experience, this Guide will be frequently updated. You are encouraged to [Health PEI's Zoom for Health](#) website for the most recent version.

Zoom for Healthcare is the Government of PEI's approved video health-care platform as a short-term solution to support providing patient care during COVID-19. Its intent to help meet the needs of their patients while supporting physical distancing and limiting, as appropriate, the use of personal protective equipment (PPE).

The government purchased Zoom for Healthcare licences are available to:
- Community-based physicians and nurse practitioners
- Mental health and addictions
- Long-term care and home care
- Primary care programs (i.e. Diabetes and COPD programs)

The Department of Health and Wellness will introduce a long-term virtual care framework and strategy at a later date.

Zoom for Healthcare is a secure, web-based virtual care video conferencing platform that connects patients to their health care provider (HCP), via their mobile device, tablet or personal computer, in their home or personal location of their choice.

GETTING STARTED

Should I Use Zoom for Healthcare?

Introducing virtual health care into your practice may be helpful if you:
- Want to provide care to patients who are in self-isolation or wish to practice physical distancing
- are in self-isolation or are available to practice remotely;
- have access to the necessary hardware and are comfortable with using technology for care (this guide should help you become comfortable)

*The quality of your experience will be dependent on your Internet speed and reliability. If your current Internet does not offer quality video streaming, you can expect a similar experience when using Zoom for Healthcare.

Hardware Requirements

To perform a virtual visit using Zoom you will need:
- A computer, tablet, or a smart phone
- An internet connection* – cellular, broadband or wired
- Speakers and a microphone – built-in or USB plug-in or wireless Bluetooth
    - Use of headset is optimal to ensure patient confidentiality
- A webcam - built-in or USB plug-in **OR** an HD cam **OR** a HD camcorder with video capture card

- An email account (If you are Health PEI employee, use your IHIS address)

Visit the Zoom website for a complete list of required/recommended hardware.

Security Settings

If you are not using a Health PEI device, ensure your hardware has optimal security settings, including:
- Ensuring your computer's built-in security software is up to date (and regularly updated)
- Installing an anti-virus program and make sure it updates regularly

Setting Up an Account

The Government of PEI has purchased licences on behalf of health-care providers.
    REGISTER FOR A LICENCE

Note: You must ensure you meet the above hardware requirements before applying. Health PEI employees should be prepared to enter their device identification number when complete the form. If you are a Health PEI employee and require hardware to meet the requirements e-mail: virtualcare@ihis.org.

Installing & Configuring Zoom

This version of the guide is based on installing Zoom on your desktop/laptop. The Zoom Desktop application is recommended for optimal performance. Click here for browser installation instructions or mobile instructions.

> **Existing Zoom User?**
> If you have an existing Zoom account with the e-mail address used to apply for this licence you will be asked to migrate your account to this new account. For patient care, only the Zoom for Healthcare solution is approved for use by Health PEI.

After submitting your request for a licence, you will receive an e-mail notification from Zoom, indicating you have been granted an account. Open the e-mail and click Activate Your Zoom Account. Note: Zoom will ask you to verify your date of birth to confirm you are above the age of 16 years. You will also be prompted to create a password for your account. **DO NOT** link your account to an email or Facebook account; instead create the account with your work e-mail address.

Download Zoom Client Desktop Application
Note: You can download the Zoom Desktop Client for Mac, Windows, ChromeOS, and Linux, as well as the Zoom Mobile App for iOS and Android from our Downloads page.

Windows

1. Enter https://zoom.us/download
2. Click **Download Zoom Client**
3. Click the **Download** button for *Zoom Client for Meetings*

Zoom Client for Meetings

The web browser client will download automatically when you start or join your first Zoom meeting, and is also available for manual download here.

Download Version 4.6.10 (20033.0407)

4. On the bottom of your screen click on the download ZoomInstaller.exe
5. The Zoom desktop app will open.

   Note: If it does not click on Start > and locate Zoom on the start button

MAC

1. Navigate to https://zoom.us/download
2. Click the blue **Download** button below "Zoom Client for Meetings." This is the basic Zoom app for Mac computers.
3. Depending on your browser settings, this will open a pop-up confirming that you want to allow downloads from the website. Click "Allow" if prompted.
4. This will immediately begin the download. Click in your downloads spot, which on Safari and Google Chrome is found in the top-right corner.
5. Double click to open the download.
6. This will kickstart the installation process. Click "Continue" on the "Install Zoom" pop-up on your desktop. Click "Continue" again if prompted
7. Zoom should finish downloading fairly quickly. You should now be face-to-face with the login screen. Enter a Meeting ID to join an ongoing meeting, or sign in or sign up at this time.

ROLE FOR ADMINISTRATIVE ASSISTANT or DELEGATED STAFF

If you are an Administrative Assistant supporting virtual visits using Zoom for Healthcare, you may be provided permissions to assist with scheduling. You are encouraged to meet with those you support and plan to use Zoom and together decide on the role you will be playing to support this functionality. To have the full functionality as listed below, you will be required to be an Alternative Host for each scheduled meeting.

The following are key tasks that may be relevant to the Administrative Assistant role. Instructions on how to do each are in this Guide.

- Help select which patients may be good candidates for virtual care. See the Guide to Providing Virtual Care for guidance.
- Contact Patients for Virtual Visit appointment booking. If you will be the initial point of contact to offer patients the option to attend their appointment virtually, please ensure you are familiar with the *Preparing your Patient* section below.
- Review technical requirements and training resources so you are comfortable speaking about Zoom for Healthcare to patients.
- Review Virtual Visit Patient Information Guide with patients.

- Obtain patient email addresses and verbal consent to communicate with them this way.
- Create the Zoom appointment for your HCP. Please familiarize yourself with the "Create the Virtual Visit Appointment" section of the HCP Virtual Visit Checklist. Review how to assign a user in the HCP account to schedule meetings on their behalf
- Email the Template to Patients If you will be sending the virtual visit invitation email to patients, please ensure you are familiar with the Template Email Invitation to Patients and are comfortable attaching the correct documents.
- Manage the virtual Waiting Room before appointments begin*
- Test audio and video functionality before an appointment with the health-care provider begins.*

*To complete this function, you will need to ensure you are set as an "Alternative Host" for each scheduled appointment. The alternate host can start a meeting, admit and send patients to the waiting room, and end or leave meetings. Alternative hosts can join a meeting at any time.

Granting Permissions to Support Staff

For support staff to play an active role with Zoom the primary account holder (i.e. physician or nurse practitioner) must grant permissions. By providing scheduling privileges to your support staff you are also assigning them as an Alternative Host. This allows them book appointments on your behalf, manage your virtual waiting room and test audio/video with the patient immediately before the appointment. See above Role for Administrative Assistant to understand how these permissions will support your patient flow.

1. Log into Zoom
2. Click **My Account** (upper right-hand corner)
3. Click **Settings**
4. Scroll down the page to **Other,** where you will find **Schedule Privilege** (see image below
5. Click **+** adjacent **Assign scheduling privilege to**
6. Enter the email address(es) of the those you wish to grant scheduling privileges (separate each email with a comma as in the example below)
7. Click Assign to complete the process.

The person assigned the privileges may need to log out and back into ZOOM if you/they have not done so since privileges were granted.

USING ZOOM FOR PATIENT CARE

In addition to becoming familiar with the technology, all health-care providers are asked to review the Health-Care Providers Guide to Providing Virtual Care.

Do you prefer to learn by video?
Watch the various ZOOM Training Videos.

NOTE: Unlike the Zoom videos, this Guide is customized for PEI health-care providers.

There are three ways in which you can use Zoom:
1. Install the application on your desktop/laptop (recommended by Zoom)
2. Use it through a Browser (Zoom works best in Google Chrome web browser)

3. Install the app on your mobile device

Booking an Appointment

Preparing your Patient
If you have decided the patient's health-care needs can be met through a virtual care appointment, the following steps should happen when a patient calls to book an appointment.

- As appropriate, provide the patient the option to attend their appointment virtually.
- Explain that it will allow them to see, hear and talk on their device from a location of their choice with their health-care provider.
- Explain the appointment would be done using a free, web-based program called Zoom for Healthcare.
- Ask if they have the technical requirements needed for Zoom for Healthcare:
  - Smartphone/tablet OR Computer/laptop & Internet Browser
  - Ability to download Free Zoom app (from Google Play or Apple App
  - Headphones OR microphone/speakers
  - High-speed Internet OR 4G LTE connection
    Patients are responsible for any charges related to their internet data usage. If patients are using data on a mobile device (instead of a wireless "Wi-Fi" connection) they should be aware that video streams require significant data. If their Internet connection currently does not provide good quality video streaming, it may not be an optimal experience for them.
- If the patient does not have the technical requirements, they will not be able to do their appointment virtually. The patient should be redirected back to their care provider or offered another option.
- If the patient does have the technical requirements, ask if they are interested in attending their appointment this way.
- If the patient is interested:
  - Ask the patient for verbal consent to communicate via email
  - Obtain patient email address;
- Provide the patient with an appointment date and time
- Explain to the patient that they will receive an email that will include:
  - A link to their Zoom for Healthcare virtual visit.
  - 'Patient Information Guide – Zoom for Healthcare (benefits, risks, privacy)
- Ask the patient if they have any questions.

Setting up the Appointment in Zoom
TAKE NOTE: The email address you use for scheduling appointments with patients will be visible to the patient. If you do not want your patient to have your email address, you may wish to set up a generic "clinic" email address (i.e. clinicname@gmail.com). The patient template email (see at end of document) advises patients that personal health-care questions should not be sent by email.

These steps are for the clinician (host) to set up an appointment. See below for the Scheduling an Appointment if those responsibilities are assigned to support staff.
1. Open your Zoom client and sign in to Zoom.
2. Click on the **Schedule** icon, this will open the scheduler window.

3. Select your meeting settings. Note that some of these options might not be available if they were disabled and locked to the off position at the account or group level.
   a. **Topic**: Enter a topic or name for your meeting.
   b. **Start**: Select a date and time for your meeting. You can start your meeting at any time before the scheduled time.
   c. **Duration**: Choose the approximate duration of the meeting. This is only for scheduling purposes. The meeting will not end after this length of time.
   d. **Time Zone**: By default, Zoom will use your computer's time zone. Click the drop-down menu to select a different time zone.
   e. **Recurring meeting**: Choose if you would like a recurring meeting.
   f. **Meeting ID**: The default option is **Generate Automatically** and it's important for added security that this always be used. By using this option, a new Meeting ID will be generated each time you schedule a meeting.
   g. **Video**
      i. **Host**: Choose if you would like the host video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.
      ii. **Participant**: Choose if you would like the participants' videos on or off when joining the meeting. Even if you turn off, the participants will have the option to start their video.
   h. **Audio**: Choose whether to allow users to call in via Telephone only, Computer Audio only, Both, or 3rd Party Audio (if enabled for your account).
   i. **Advanced Options**:
      There are a few Advanced Options you should consider using. Click on the arrow to view additional meeting options.
      i. **Schedule For**: If you have scheduling privilege for another user, you will be able to choose who you want to schedule for from the drop-down menu.
      ii. **Alternative hosts**: Enter the email address of another Zoom user who is Licensed, on your account to allow them to start the meeting in your absence. Read more about Alternative Host. If you have assigned scheduling privileges you are automatically an Alternative Host
   j. **Calendar**: Select a calendar service to add the meeting to and send out invites to participants.
4. Click **Schedule** to finish and open the selected calendar service to add the meeting.
   a. Note: If you are scheduling a recurring meeting, you will need to set the recurrence in your calendar service.
   b. Note: Choosing Other Calendars will allow you to copy and paste the scheduled meeting information such as date, time, and meeting URL.
5. You will need to then need to invite patients to attend the appointment (See Sending an Appointment)
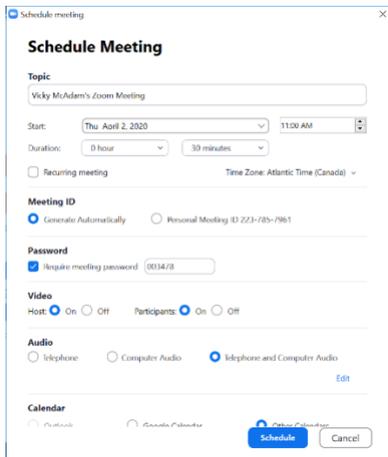
Scheduling a Virtual Health Appointment on Behalf of a Provider

** The provider must grant support staff scheduling privileges in order to have appointments scheduled on their behalf. See the Role for Administrative Assistant Section to learn how to grant permissions. By providing scheduling privileges to your support staff you are also

assigning them as an Alternate Host. This allows them to manage your virtual waiting room and test audio/video with the patient immediately before the appointment.**

If the support staff plans to manage the "Waiting Room" and support the patient by testing audio and video prior to the appointment, they must be granted privleges. **

1. Log into ZOOM (desktop icon)

2. Verify the patient is an appropriate candidate for a virtual care appointment
3. Obtain verbal consent to use email for an appointment and videoconference care.
4. Click **Meetings**
   You may choose to use an existing template to schedule the appointment (if applicable)

5. Complete the **Meeting** details

6. Under **Schedule For**, choose the provider you want to schedule the appointment for from the dropdown

   Note: if you do not see them on the list, they will need to grant you privileges to book on their behalf.
7. Click **Schedule** when all details are complete.
8. Invite the patient to the Virtual Health appointment (See Next Instructions)

Sending the appointment by email + attachments

1. Go to the appointment already scheduled in Zoom and copy the invitation (see "Join URL" link. Note: You may see other options to send the invite, but this copy and paste option will be the most straightforward way for the patient to accept.
2. Paste the link it in the body of an email
3. Include the email template (see below if desired)
4. Attach the Patient Information Guide for first time virtual appointments
5. Send email to the patient
   Note: Do not include personal or private information about the patient in the meeting invitation.

Managing Your Waiting Room

Zoom for Healthcare offers a unique "Waiting Room" feature which is designed to increase security of virtual care and avoid unauthorized people from joining the appointment. It is automatically enabled as a feature with your license.

Each health-care provider will need to experiment with the functionality and decide at a practice level how to best support smooth patient flow. The health-care provider may wish to manage the waiting room, or this may be a role for support staff.

Admitting participants during a meeting

1. As the meeting host, click **Manage Participants**.

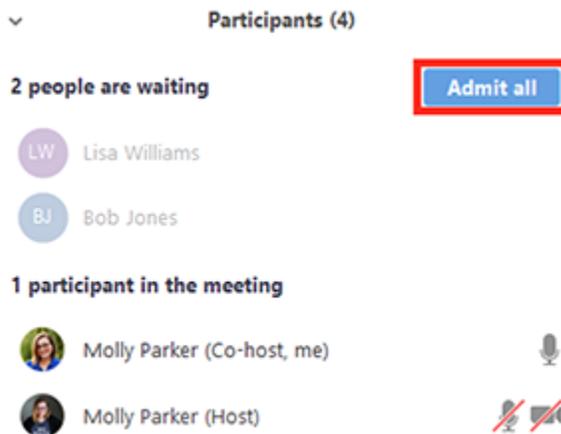2. Click **Admit** to have the participant join the meeting.
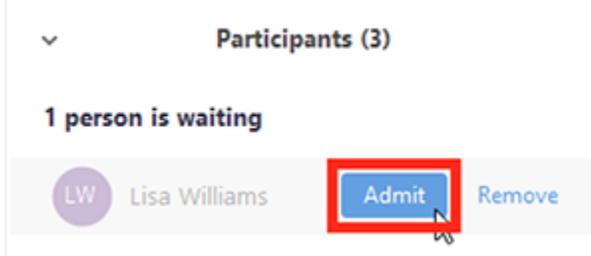
Admit all participants from the Waiting Room

1. As the meeting host, click **Manage Participants**.
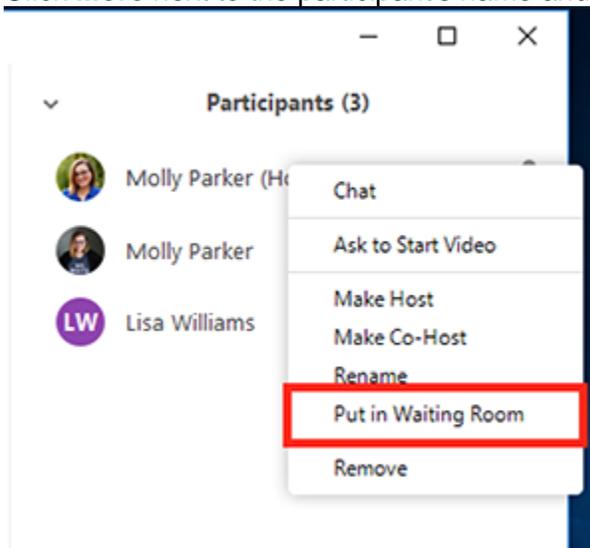
2. Click **Admit all**.

Sending participants to the Waiting Room during a meeting

1. As the meeting host, click **Manage Participants**.

2. Click **More** next to the participant's name and choose **Put in Waiting Room**.
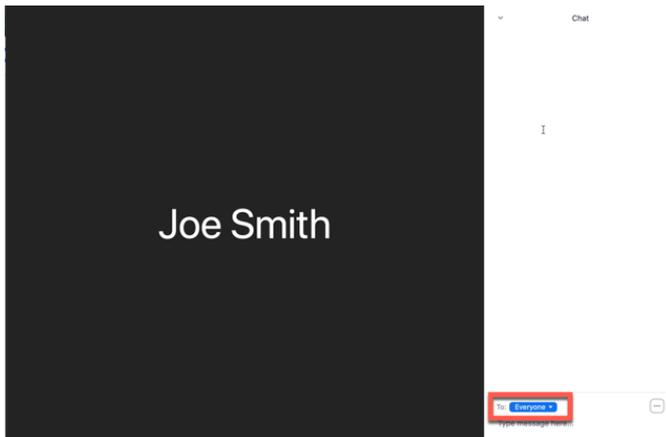

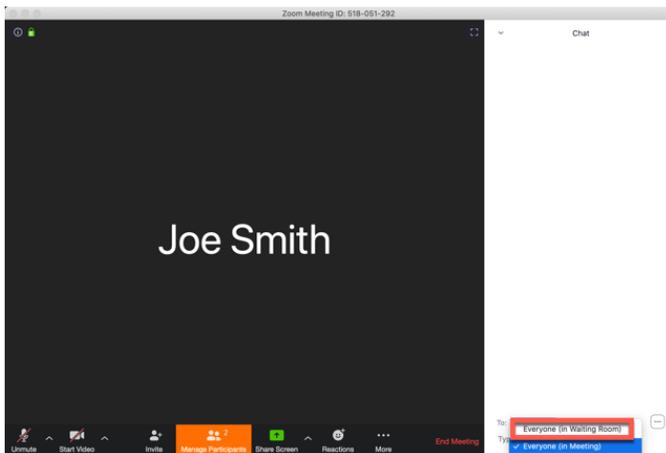## Sending messages to participants in the Waiting Room

1. As the meeting host, click **Chat**.

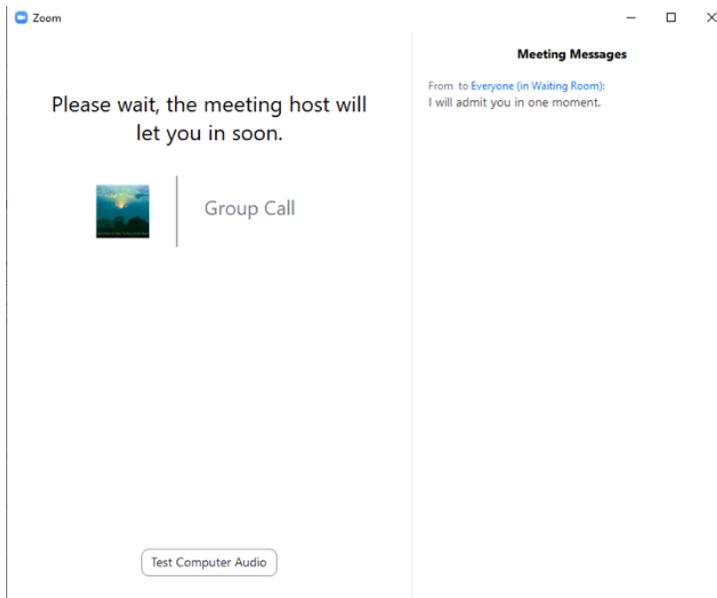2. Click the dropdown next to **To:**

3. Click **Everyone (in Waiting Room)**.

4. Type and send your chat message to the waiting room.

Once the message has been sent, the participants in the Waiting Room will see the message on the Waiting Room screen:

Zoom　　　　　　　　　　　　　　　　　　　　　− □ ✕

Meeting Messages

From to Everyone (in Waiting Room):
I will admit you in one moment.

Please wait, the meeting host will
let you in soon.

Group Call

[Test Computer Audio]

Beginning an Appointment (Starting a Meeting)

To see your upcoming meetings, when logged into Zoom, select "schedule"
From Desktop
1. In Zoom, click Meetings.
2. Under the Upcoming tab, select the meeting you want to start. Additional options will appear.
3. Click Start.

From Your Email or Calendar
1. Confirm that you are logged into Zoom
2. Start the meeting by clicking on the URL link in your e-mail or calendar invitation.
3. The Zoom client should launch automatically and start the meeting.
4. Select if you would like to connect audio and/or video and click

Audio and Video Control

Take Note: Audio and Video issues will be the most common issue for patients to navigate. You may wish to have these troubleshooting instructions nearby to support them. If your support staff will be playing an active role with Zoom you may wish to have them test the functionality with the patient before the appointment begins.

At the bottom of the screen, are controls to control the audio and video of your device. By clicking on the microphone or camera, you enable or disable the audio and video on your device.

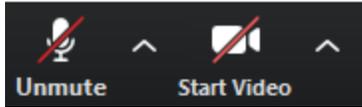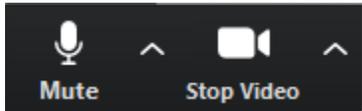Image 1: microphone and video camera are disabled

Image 2: microphone and video camera are enabled

Audio controls (click **^** next to **Mute/Unmute.** The audio controls allow you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio options in the Zoom settings.

Video controls (click **^** next to **Start/Stop Video**): If you have multiple cameras on your computer, you can select which Zoom is using, access the full video controls, and select a Virtual Background.

First Patient Encounter with Zoom
Before hosting an appointment, especially if you are new to the tool, you are encouraged to test your connection first. Test: https://zoom.us/test

When you have joined the appointment and see your patient:

See Audio and Video Above, if your appointment begins and the patient's sound/video is not working.

At the beginning of each appointment.
- Authenticate the patient's identity (standard with regular practice guidelines visual identity and one other identifier such as DOB, health card number)
- Receive and document consent for video conference use. They may opt to not use the technology at any point during the appointment.
- Confirm the patient is in the province where you hold your license.
- Ask if they are in an appropriate and private location and ask that they identify if anybody is with them.
- Advise the patient that if the virtual visit does not meet their, or the health-care provider's needs, this will be discussed and other arrangements will be made.
- Advise the patient that you will not be recording the session. Ask the patient if they plan to record the session. [See CMPA Article: Smartphone recordings by patients: Be prepared, it's happening]
- Ask the patient if they have any questions.
- Ask the patient if they are comfortable and are ready to start the virtual visit.

Invite a new person during a meeting

1. During a meeting, you can invite people to join by clicking on Participants tab in your meeting controls at the bottom of the page.

2. After doing so, select Invite from the list of options.
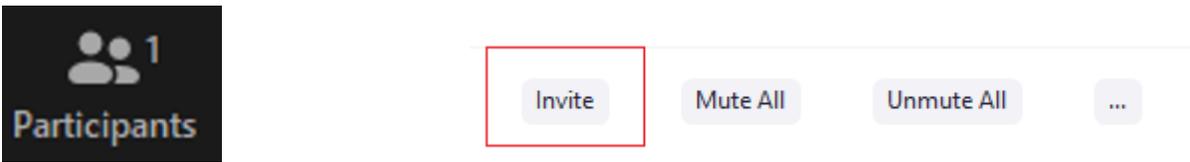
Option 1
1. Click e-mail and you can choose your mail program
2. The default Email will open up your default email application (ex. Outlook, Groupwise, etc.)
3. If you are already logged in, a new email will be composed automatically with the meeting information included in the body of the email.
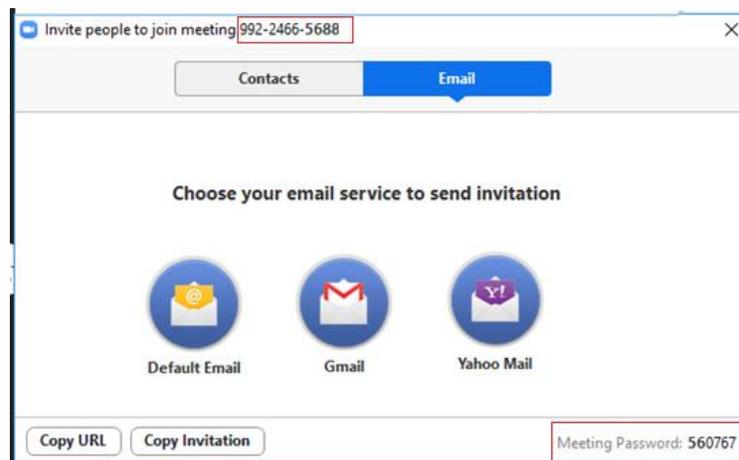
Option 2
1. Select Copy Invitation
2. Open the email application of your choice and paste the invitation in the body
3. Enter the email address, subject, and any other information.

Option 3
1. Provide the meeting id (top of the screen) and Meeting Password (bottom of the screen) to the new person so they can enter it in.

Mobile Device
1. Click on Participants
2. Select Invite
3. And choose from the list of available options

Ending a Meeting

With the Patient

- Make an extra effort to confirm the patient's understanding of the assessment and plan.
- Ask if they were comfortable with how the appointment went and if they would be interested in having a virtual appointment again.
- Complete an encounter note as you would for an in-person meeting and send any necessary prescriptions, requisitions, referrals as required.

With Zoom

The host of an active Zoom meeting will be given the following options when attempting to end or leave a meeting

Option 1: End Meeting for All

This option will end a Zoom meeting for all participants and alternative hosts. Recommended for one-on-one patient meetings so you know the patient has ended their video session.

1. Select 'End Meeting' from the bottom menu of the Zoom meeting interface.
2. Select 'End Meeting for All' to end the meeting for all participants and alternative hosts.
3. On a mobile device, the option is located at the top of the screen

Option 2: Leave Meeting

If the meeting contains only one host, this option will also end the meeting for all participants. If the Zoom meeting contains multiple hosts (if you are consulting with multiple care providers), the meeting will remain active after the host has left the meeting.

1. Select 'End Meeting' from the bottom menu of the Zoom meeting interface.
2. Select 'Leave Meeting'.
3. On a mobile device, the option is located at the top of the screen

Option 3: Assign an alternative host before leaving a meeting

A Zoom meeting host may wish to assign an alternative host for the Zoom meeting so that the meeting will remain active once the host leaves the meeting.

1. Select 'Manage Participants' from the bottom menu of the Zoom meeting interface.
2. Hover over the name of the participant you wish to make the host, then select 'Make Host'.
3. Select 'Leave Meeting' from the bottom menu, then select 'Leave Meeting'.

SCHEDULED APPOINTMENT EMAIL TEMPLATE

Template Appointment Email

SUBJECT LINE: Virtual Appointment with <Insert Patient Initials>

EMAIL BODY:

<Paste the Zoom Meeting link >

For your privacy, do not share or forward the meeting link

Try the Test Meeting to check your Audio & Video settings in advance and help ensure your virtual care appointment is successful.

To help you prepare for your virtual visit and to ensure you receive the best care, please review our Patient Information Guide (see attached).

If you need to reschedule, contact our office as soon as possible at
[phone number] [email address]

If you are having difficulty joining, please access the online resources found in the Zoom Help Centre, Zoom Video Tutorials and Live Training.

Please note: this email address is used for scheduling purposes only. Please do not respond to this email with personal health information or medical questions for your health-care provider.

[Closing Greeting],

[Sender Email Signature]

CONFIDENTIALITY NOTICE - *Email is not considered to be a secure method of communicating personal or sensitive information. Please do not reply to this email with any information about yourself or your health. If you have any questions about your health, please speak with your health care provider during the appointment.* If you have received this email in error, please notify the sender as a courtesy and delete the email and its attachments immediately. Thank you for your cooperation.