

Guide to Zoom

This tip sheet reviews how to use Zoom to complete standalone virtual visits with patients. It includes how to configure a standard Enterprise account with the optimal settings for healthcare. Zoom is a temporary option for video-assisted Virtual Visits during the COVID-19 Crisis.

Activating your Account and Signing into Zoom

All MGH outpatient providers and health professionals have had a Zoom account created for them using their primary email address (i.e. @partners.org or @mgh.harvard.edu, depending on the user).

An email from "no-reply@zoom.us" was sent to your primary email address with a link to activate the account.

Note: If you did not receive the email, you can go to <https://partners.zoom.us/signup> to claim your account.

1. Click 'SIGN IN' in the top right corner

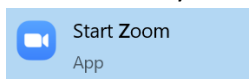


2. Type your email address and click 'Forgot password?'

You can use Zoom on any device (computer, smartphone, tablet) that has a camera, microphone and is connected to the internet. A Zoom Application is needed to use Zoom and should be downloaded. Mobile users will be directed to the App Store.

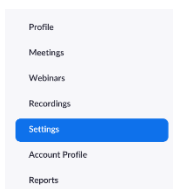
Signing into Zoom

Once you have activated your account, continue to sign into Zoom at <https://partners.zoom.us/> or open the Zoom app



Security Settings Recommended Prior to Patient Visits

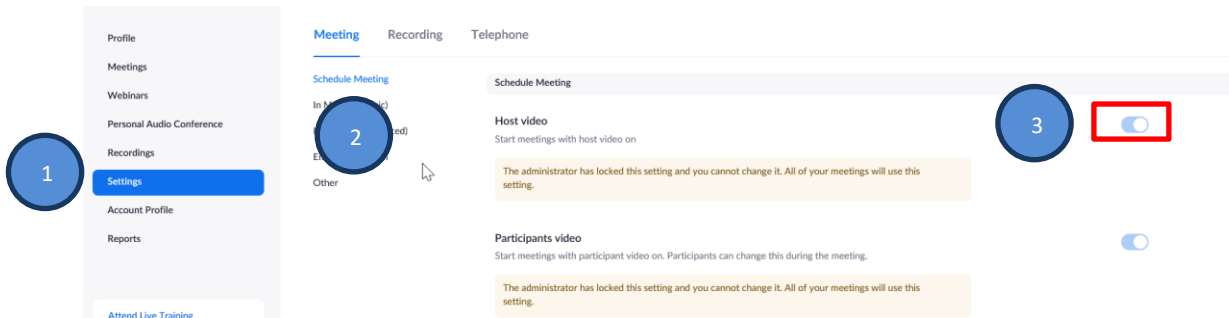
For the most secure platform the following 5 settings should be set. Follow the steps explained below. Depending on your account type, some settings may already be preset for you.



1. Host Video
2. Use Personal Meeting ID (PMI) When Scheduling a Meeting
3. Waiting Room
4. Local Recording (Disable)
5. File Transfer (Disable)

1. Host video

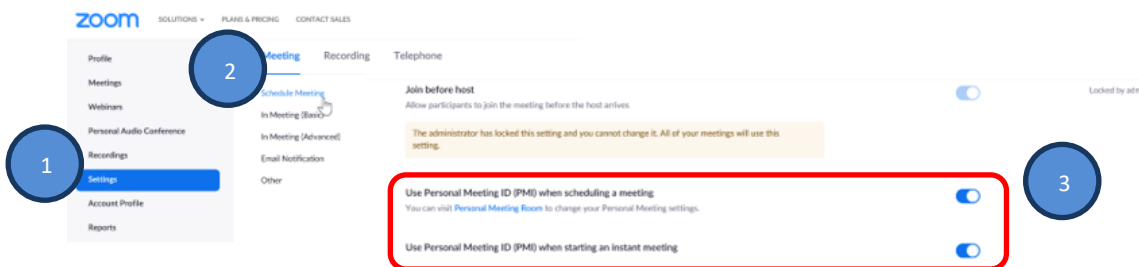
- 1) Select **Settings** → 2) **Schedule Meeting** → 3) enable **Host video**



2. Use Personal Meeting ID (PMI) When Scheduling a Meeting

Your personal meeting ID will need to be shared with your scheduling staff to schedule patient visits in advance.

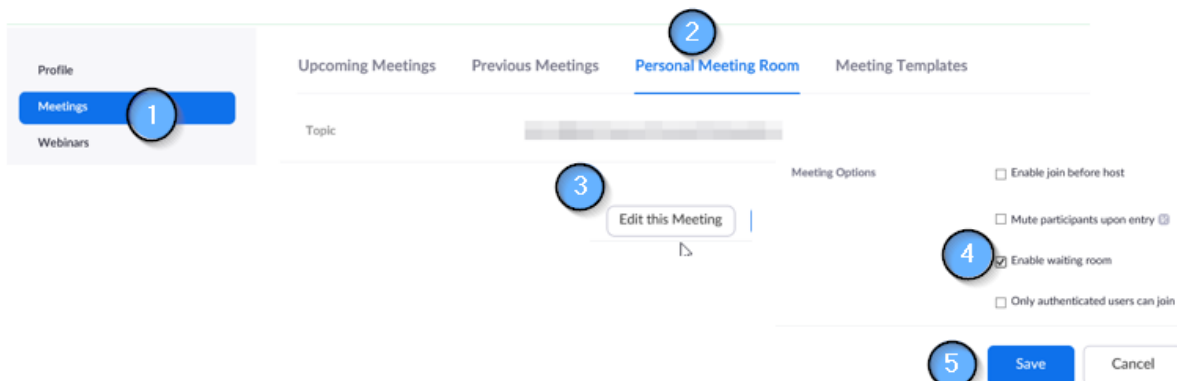
- 1) Select **Settings** → 2) **Schedule Meeting** → 3) scroll down to enable **Use Personal Meeting ID (PMI) when scheduling a meeting** and **Use Personal Meeting ID (PMI) when starting an instant meeting**



3. Waiting Room

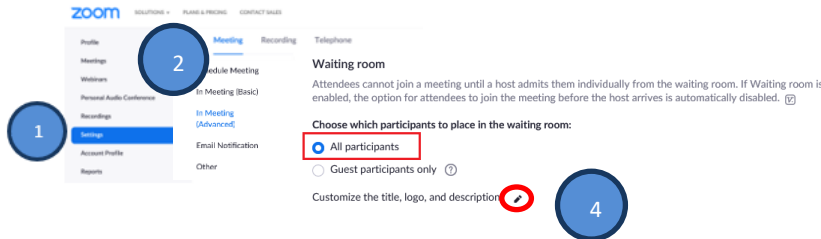
**** Important **** The waiting room allows the provider to control who enters an appointment and prevents more than one patient from being in the visit at the same time. Depending on your account type, you will need to modify one or both of the following settings.

- 1) Select **Meetings** -> 2) **Personal Meeting Room** -> 3) scroll to the bottom and click **Edit this Meeting** -> 4) if not defaulted, check **Enable waiting room** -> 5) **Save**



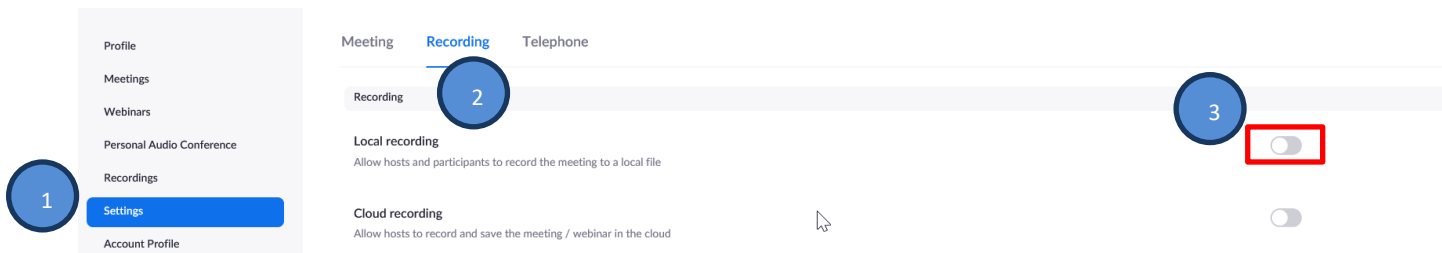
Waiting Room – Step 2

1) Select **Settings** → 2) **In Meeting (Advanced)** → 3) scroll down to enable **Waiting room** and enable for **All participants** → 4) **Optional** - choose to **customize** and add your name to the waiting room.



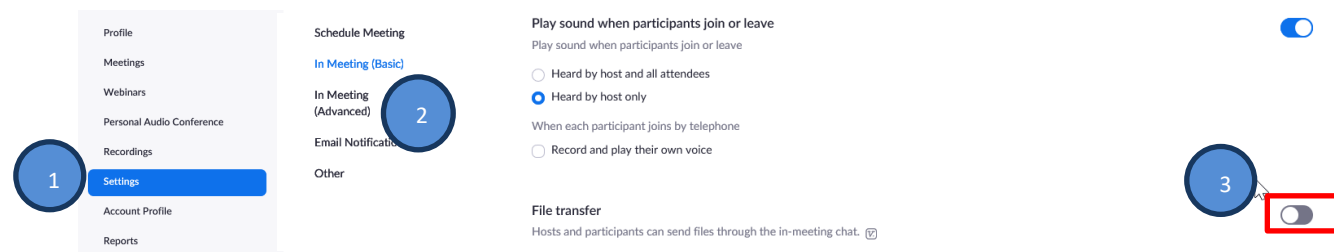
4. Disable Local Recording Feature

1) Select **Settings** → 2) **Recording** → 3) disable **Local recording**



5. Disable File Transfer

1) Select **Settings** → 2) **In Meeting (Basic)** → 3) Disable **File transfer**



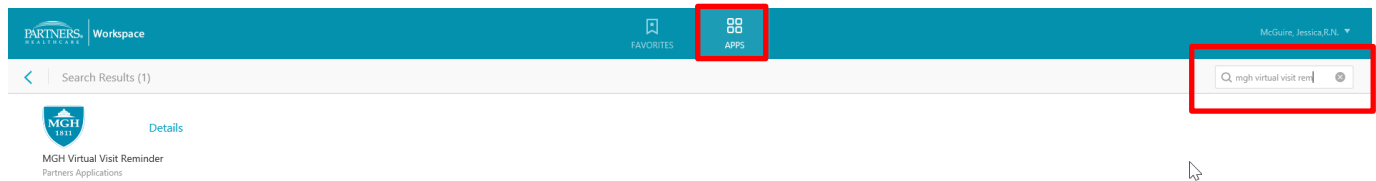
**** Important **** Update Zoom whenever updates are available. This will decrease interruptions to your Zoom account.

Sending Patient Invitation/Protecting Personal Information

Admin staff/ schedulers and clinicians have access to the **MGH Virtual Visits Reminder Tool**, which enables sending reminder emails in advance with your personal Zoom url: [partners.zoom.us/j/\[Personal Meeting ID\]](https://partners.zoom.us/j/[Personal Meeting ID]). Providers can also use this tool for “on-the-fly” unscheduled visits. The email includes the appointment date and time with the zoom hyperlink. It does not include any PHI.

If not on VPN, the tool can be found at <http://myapps.partners.org/>

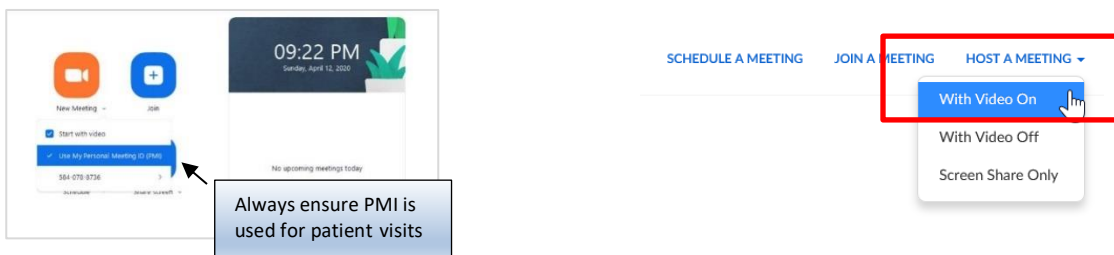
Click **APPS** → search **MGH Virtual Visit Reminder**



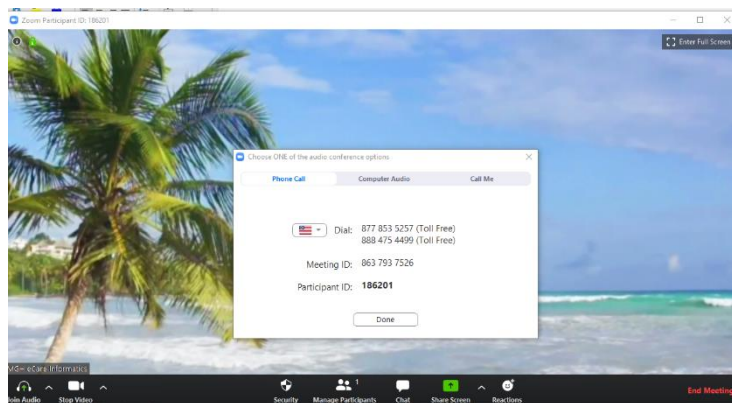
Refer to pages 4-6 on [MGH Virtual Visit Reminder Tool tip sheet](#) for more details.

Launching and Managing Video Visits

Launch Zoom from either your Zoom app or from an internet browser.



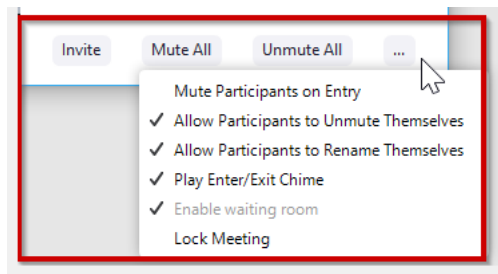
Audio Connection: choose either phone or computer audio



Managing Waiting Room

When a patient arrives, they are placed in the waiting room and not directly into the visit. Patients cannot see others in the waiting room. It is possible for the provider to one-way chat with patients in the waiting room.

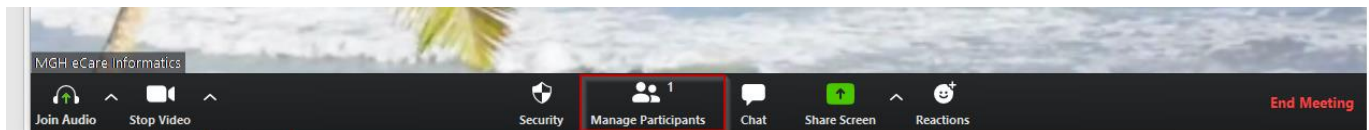
A chime will sound each time a patient enters your waiting room and a small pop up window appears with an option to admit. The settings can be changed in the participant sidebar menu.



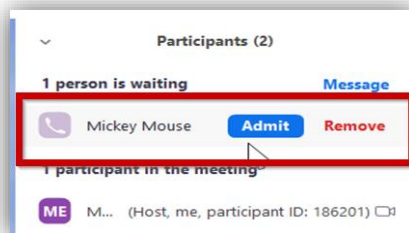
**** Important**** When receiving an alert that a new patient has arrived **do not** click **Admit** until the current patient has been removed. This will prevent admitting two patients into the same appointment.

Admitting a Patient from the Waiting Room

To view your waiting room, click **Manage Participants**.



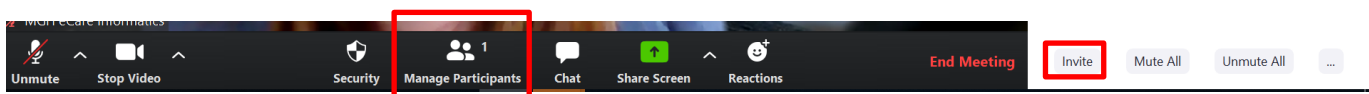
This opens a sidebar listing all participants. Hover over and select the patient you wish to admit. Click **Admit**.



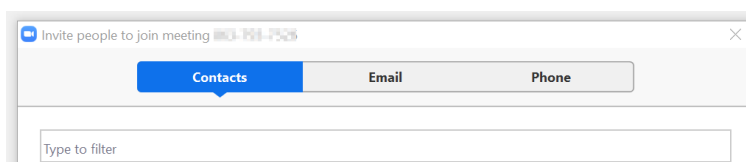
You are now connected with the patient and their video will display.

Inviting Other Care Team Members or Family Members to the Visit

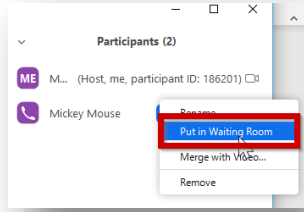
Click **Manage Participants** → **Invite** to invite others to the visit.



Choose from **Contacts**, send an **email**, or **phone** to connect with another care team member or family member.



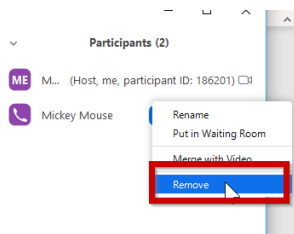
You can put the patient back in the waiting room during the visit while waiting for other participants to join. To do so, click **Manage Participants** → find patient → click **More** → **Put in Waiting Room**
Do not end the meeting. If session ends prematurely, click the new meeting button again to re-enter your room.



When ready to bring the patient back to the visit, find the patient and click **Admit** again.

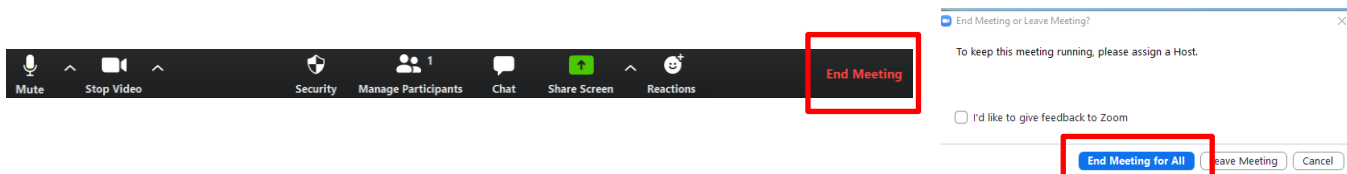
Ending the Patient Visit

When the patient visit is complete, click **Manage Participants** → find patient → click **More** → **Remove** to end the visit.



No need to close Zoom. Repeat steps above to admit next patient.

When all visits are completed for the day, click **End Meeting** → **End Meeting for All**



BEST PRACTICE: To maintain patient privacy and safety, **Log Out** of Zoom at the end of your clinic each day. Do not save your login information on devices shared with other people.

[Click here](#) to watch a demo of a provider conducting virtual video visits.

Troubleshooting with the Patient

If patient leaves the meeting by mistake:

- The link to the meeting can be used again. The patient needs to re-select the link and rejoin the session.

If your patient is having audio and video issues:

Audio:

- Headphone use recommended.

- If not using headphones, put your mobile device on speaker so you can look directly into the video.
- Reduce the volume on your speakers to prevent echoing or feedback.
- Keep your microphone away from your speakers.

Video:

- If using Wi-Fi, be close to the router and make sure no other users are consuming bandwidth.

In case of disconnection:

- If you are using a computer, have a phone available as back-up in the event you are disconnected, or your provider calls you.

Refer to the [Patient Quick Start Guide](#) for more details.

Epic Documentation

Documenting Virtual Visits in Epic guide - [Click Here](#)