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 <u>temporary</u> option for video-assisted Virtual Visits during the COVID-19 Crisis.

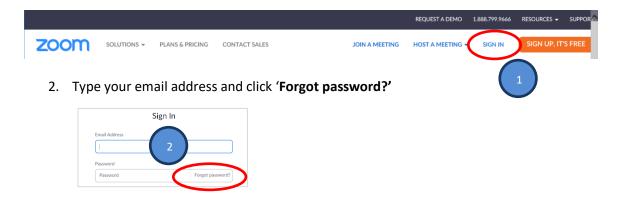
Activating your Account and Signing into Zoom

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 "<u>no-reply@zoom.us</u>" 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 <u>https://partners.zoom.us/signup</u> to claim your account.

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



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.



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

Zoom app Start Zoom

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.

Profile
Meetings
Webinars
Recordings
Settings
Account Profile
Reports

- 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 \rightarrow 2) Schedule Meeting \rightarrow 3) enable Host video

	Profile	Meeting Recording Telephone	
1	Meetings Webinans Personal Audio Conference Recordings Settings	Schedule Meeting Schedule Meeting In 1 2 of of E 2 of ther Host video Start meetings with host video on Other The administrator has locked this setting and you cannot change it. All of your meetings will use this setting.	
	Account Profile Reports	Participants video Start meetings with purticipant video on. Participants can change this during the meeting. The administrator has locked this setting and you cannot change it. All of your meetings will use this setting.	

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

		S & PRCING CONTACT SALES		
	Profile 2	Meeting Recording	Telephone	
	Meetings Webinars	Schedule Meeting	Join before host Allow participants to join the meeting before the host arrives	Locked by admin
\bigcap	Personal Audio Conference Recordings	In Meeting (Advanced) Email Notification	The administrator has locked this setting and you cannot change it. All of your meetings will use this setting.	
	Settings	Other	Use Personal Meeting ID (PMI) when scheduling a meeting	
	Account Profile Reports		You can visit Personal Meeting Room to change your Personal Meeting settings.	
			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 \rightarrow 2) In Meeting (Advanced) \rightarrow 3) scroll down to enable Waiting room and enable for All participants \rightarrow 4) <u>Optional</u> - choose to customize and add your name to the waiting room.

Profe	Meeting Recording	Telephone
Meetings 2	edule Meeting	Waiting room
Webinars		Attendees cannot join a meeting until a host admits them individually from the waiting room. If Waiting room is
Personal Audio Conference	In Meeting (Basic)	enabled, the option for attendees to join the meeting before the host arrives is automatically disabled. 😥
Recordings	In Meeting (Advanced)	Choose which participants to place in the waiting room:
Settings	Email Notification	
Account Profile		O All participants
Reports	Other	Guest participants only 🕜
		Customize the title, logo, and description 🕢 🔒

4. Disable Local Recording Feature

1) Select Settings \rightarrow 2) Recording \rightarrow 3) disable Local recording

	Profile	Meeting Recording Telephone
	Meetings	Recording 2
	Webinars	
	Personal Audio Conference	Local recording Allow hosts and participants to record the meeting to a local file
	Recordings	nion nous una participanta la receito un mecanig cola nic
ソ	Settings	Cloud recording
	Account Profile	Allow hosts to record and save the meeting / webinar in the cloud

5. Disable File Transfer

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

	Profile	Schedule Meeting	Play sound when participants join or leave Play sound when participants join or leave	
	Meetings	In Meeting (Basic)	 Heard by host and all attendees 	
	Webinars	In Meeting (Advanced)	O Heard by host only	
	Personal Audio Conference		When each participant joins by telephone	
	Recordings	Email Notificatio	 Record and play their own voice 	
1	Settings	Other		3
	Account Profile		File transfer	
	Reports		Hosts and participants can send files through the in-meeting chat. $ onumber equation (Content of the content $	

** 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]. 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 <u>http://myapps.partners.org/</u>

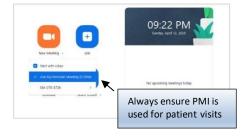
Click APPS → search MGH Virtual Visit Reminder

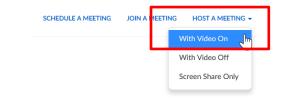


Refer to pages 4-6 on <u>MGH Virtual Visit Reminder Tool tip sheet</u> for more details.

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

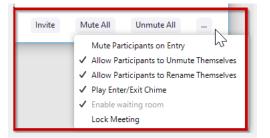


Managing Waiting Room

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 <u>do not</u> 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.

	1 person is waiting	Message
Mickey Mouse Admit Remov	Mickey Mouse	Admit Remove

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 \rightarrow 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.

Contacts	Email	Phone
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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** \rightarrow find patient \rightarrow click **More** \rightarrow **Put in Waiting Room Do not** end the meeting. If session ends prematurely, click the new meeting button again to re-enter your room.

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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** \rightarrow find patient \rightarrow click **More** \rightarrow **Remove** to end the visit.

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

When all visits are completed for the day, click End Meeting \rightarrow End Meeting for All

Or A Control of Chat Share Screen Reactions
 Or All Chat Share Screen Reactions
 O

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.

<u>Click here</u> 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

