Zoom for Virtual Health Visits Manual

Office of Virtual Health
Connecting for health
Introduction

**Zoom for Healthcare** is a cloud-based video conferencing software approved for the delivery of virtual health. It is endorsed by PHSA and the British Columbia Ministry of Health.

A **virtual health visit** is a technology-enabled remote interaction between providers, provider(s) and patient(s), and patients and families to address patients’ health.

To support virtual health visits, PHSA is provisioning Zoom accounts to eligible health care users. These accounts are referred to as **Zoom for Virtual Health Visits** accounts.

**This manual** provides step-by-step information on how to schedule, host, and use various functions with your Zoom for Virtual Health Visits account.
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Getting started with Zoom for Virtual Health Visits

**Zoom for Virtual Health Visits: Tips for the Team**

1. Introduce virtual health to patients
   - Introduce virtual health options to patients including phone/video/email/text
   - Discuss the Zoom for Virtual Health Visit process at your clinical program
   - Check the technical readiness and digital literacy of your patients

2. Inform patients about risks and differences
   - Inform patients about risk of using Zoom for virtual health visits by giving them the **Patient Notification for Digital Communications** form
   - Validate patient's identity (see example script)
   - Note on the patient record that they have received information on the risks of virtual health

3. Communicate patient quick tips as needed
   - Refer patients to the **Patient Resources page** (link included in their virtual health visit invite)
   - Encourage a **Zoom Meeting Test**
   - Ensure the patient is aware of the patient help desk number—1-844-442-4433 (toll-free)
   - Set up **interpreter services** as needed

4. Start the virtual health visit
   - Choose a private and well-lit location with reliable internet access
   - Review **security best practices**
   - Conduct a **Zoom Meeting Test** to check your video and sound
   - Admit participants from the waiting room
   - In the unlikely event of technical issues, switch to a telephone visit with the patient

5. End the virtual health visit
   - Summarize visit outcome for the patient
   - Actively end the virtual health visit for everyone or assign a new host before you leave
   - Document the visit in the usual record of care
   - Follow up with any orders

**Webside manner and etiquette**

- Close unnecessary programs and applications. Only open those you intend to reference during the virtual health visit.
- Introduce yourself and all participants (who can hear or see) - even those off camera
- Let participants know where you are located
- Look towards the camera to establish eye contact
- If you're looking down at something, explain what you are looking at
- Speak slowly and clearly; non-verbal cues are important for engagement (e.g. nodding, leaning forward)
- Minimize distracting activity and sounds

**Technical Support**

- PHSA
  - (604) 675-4299; servicedesk@phsa.ca
- PHC/VCH
  - (604) 875-4334; servicedesk@vch.ca
- Island Health
  - (250) 370-8777; servicedesk@viha.ca
- Account related support / other questions
  - OVHZoomsupport@phsa.ca

*Updated: March 4, 2021*
Signing in with SSO

**Purpose**
Single sign-on (SSO) allows users to login to Zoom using health authority (e.g. PHSA) credentials. To sign in to Zoom using SSO, users must be connected to a corporate network, (i.e. on site) or use the Microsoft Authenticator app (i.e. used to log in to VPN) when working off site.

The sign in process will take about a minute or less.

**Requirements**
- If you haven’t used SSO to sign in before, first make sure you are signed out of Zoom.
- If working off-site:
  - Microsoft Authenticator app on your device – see instructions.

**How to access Zoom**
There are 3 ways to access Zoom – web browser (https://zoom.us/), desktop client (i.e. application), or mobile (i.e. phone or tablet) application. SSO allows users to quickly and securely login to any of these 3 platforms using their PHSA credentials.

*Note that signing in to one of the above platforms does not automatically sign you in to the others – you will need to sign in to each individually.*

Depending how you access Zoom, and whether you are logging in on-site or remotely, the process of signing in using SSO may vary slightly. Users on the desktop or mobile apps will remain signed in unless you choose to log out or restart your device.
If you are on-site

1. If you haven’t used SSO to sign in before, first make sure you are signed out of Zoom.
2. Click Sign In on your chosen platform (i.e. web browser, desktop app, or mobile app).
3. Click SSO or Sign In with SSO.
4. All users type phsa into the Company Domain textbox and click Continue.
5. If prompted, type in your organizational email (e.g. @phsa.ca, @bccancer.bc.ca) OR select your profile and click Next.
6. Depending on your chosen platform:
   a. **Web browser**
      i. You will be signed in and taken to your Profile page.
   b. **Desktop app**
      i. Your default browser will open up. Check the box ‘Always allow phsa.zoom.us…’ and click Open Zoom Meetings or Launch Zoom.
   c. **Mobile app**
      i. Follow steps 4 – 9 under ‘If you are off-site’.
7. You will now be signed in to Zoom.
If you are off-site

1. If you haven’t used SSO to sign in before, first make sure you are signed out of Zoom.

2. Click **Sign In** on your chosen platform (i.e. web browser, desktop app, or mobile app).

3. Click **SSO** or **Sign In with SSO**.

4. All users type `phsa` into the **Company Domain** textbox and click **Continue**.

   **Note:** You may not see the following prompts in steps 5 - 8 if you have already followed these steps to sign in to the PHSA network, or have checked ‘Remember Me’ when first signing in to Zoom.

5. If prompted, type in your organizational email (e.g. @phsa.ca, @bccancer.bc.ca) OR select your profile and click **Next**.

6. Login using your network password connected to the email.

7. Approve the login on your Microsoft Authenticator app.

8. Check the box ‘**Don’t show this again**’ and click **Yes** to complete sign in.
9. Depending on your chosen platform:
   a. **Web browser**
      i. You will be signed in and taken to your **Profile** page.
   
   b. **Desktop app**
      i. Your default browser will open up. Check the box ‘Always allow
         phsa.zoom.us…’ and click **Open Zoom Meetings** or **Launch Zoom**.
   
   c. **Mobile app**
      i. A launch page in your web browser will briefly appear and then you
         will be automatically taken to the Zoom app.

10. You will now be signed in to Zoom.
Setting up your profile

**Purpose**
Your Zoom profile allows you to update your user information, including your name, display name, gender pronouns, and more. Some of this information is displayed to other users in the account, such as your name, department, and job title.

**Note**: Some settings can only be changed by an account owner or admin.

**Accessing your profile**

1. Sign in to [zoom.us](http://zoom.us).
2. In the navigation menu, click **Profile**.
3. Click **Edit** on the right side. In addition to your **Name**, **Department**, **Job Title**, **Company**, and **Location**, you can also view and edit the following:
   - **Profile Picture**: Click your profile picture to add, crop, or change it.
   - **Display Name**: This is the name that appears on your profile across the Zoom platform, such as in the Zoom desktop client and in meetings and webinars.
   - **Pronouns**: Enter your pronouns and choose whether you want to share them in meetings and webinars.
Meeting Controls (as a host)
1. Audio
   - Mute and unmute microphone
   - Click ^ to manage audio settings

2. Video and virtual backgrounds
   - Start and stop video
   - Click ^ to manage video settings
   - Click ^ to choose a virtual background or quickly blur your background. See Setting up a virtual background for the desktop application for more details

3. Security
   - Lock virtual health visit
   - Control participant abilities
   - Remove participants
   - Report participants

4. Participants
   - View participants in the virtual health visit
   - View and admit participants in the waiting room
   - Hover over participant’s name and click More to manage participant
   - Click Invite to invite additional participants

5. Polls
   - Start (launch) polls or create an ad-hoc poll
   - See Polling for more details

6. Chat
   - Chat with participants
   - Take note of who is receiving the message, i.e. everyone vs. a private chat with a specific participant

7. Share screen and whiteboard
   - Share screen (entire desktop) or a specific application that is open
   - Note: if sharing a video (e.g. from YouTube) or something with audio, tick the box to Share computer sound so participants can hear the audio
   - Select Whiteboard to begin a whiteboard session.
   - See Screen Sharing for more details.

8. Record
   - Approved users can create an audio and video recording of a webinar or meeting.
   - Recordings will be automatically saved to the cloud.
   - See Recording for more details

9. Breakout rooms
   - Open and manage breakout rooms within the virtual health visit.
   - See Breakout Rooms for more details.

10. More → Focus Mode
    - Click More to access Focus Mode, which gives hosts view of all participants’ videos without other participants seeing each other.
    - See Using Focus Mode for more details.

11. End
    - If the virtual health visit is finished, click End the Meeting for All.
    - Alternatively, if you are the only person leaving the meeting, click Leave the Meeting and assign a new host before you leave

12. Change video layout
    - Select your preferred video layout:

      Speaker View
      Gallery View

      Shows up to 49 participants

13. Meeting Information
    - Click the green or orange shield to quickly access & copy the current meeting information, including:
      - Meeting link
      - Meeting ID & passcode
      - Security settings overview
Zoom Meetings vs. Webinars

Meeting and webinars offer similar features and functionality but have some key differences: in the healthcare setting, one of the most important differences are that webinars do not include a virtual waiting room and therefore participants cannot be screened before entering the session.

**Note:** For best privacy and security practice, all virtual health visits that directly address a patient’s health or allow a patient to be seen or heard should be conducted as **meetings** so participants can be screened.

<table>
<thead>
<tr>
<th>Meetings</th>
<th>Webinars</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Key feature:</strong></td>
<td><strong>No waiting room</strong>; participants are</td>
</tr>
<tr>
<td><strong>Waiting room included;</strong></td>
<td>automatically let into the webinar once it’s</td>
</tr>
<tr>
<td><strong>participants need to be let in by</strong></td>
<td>begun.</td>
</tr>
<tr>
<td><strong>the host(s).</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Description:</strong></td>
<td><strong>Webinars are designed so that only the</strong></td>
</tr>
<tr>
<td><strong>Meetings are designed to be</strong></td>
<td><strong>host and any panelists can share their</strong></td>
</tr>
<tr>
<td><strong>collaborative</strong>, with all participants</td>
<td><strong>video, audio, and screen. Other</strong></td>
</tr>
<tr>
<td><strong>being able to turn on their audio and</strong></td>
<td><strong>participants are view-only</strong> and can</td>
</tr>
<tr>
<td><strong>video, screen share, chat, and see who</strong></td>
<td><strong>interact with the panelists via Q&amp;A, chat,</strong></td>
</tr>
<tr>
<td><strong>else is attending.</strong></td>
<td><strong>and poll questions.</strong></td>
</tr>
<tr>
<td><strong>Best used for:</strong></td>
<td><strong>Best used for:</strong></td>
</tr>
<tr>
<td>• Virtual health visits that directly address</td>
<td>• One or a few people (“panelists”)</td>
</tr>
<tr>
<td>a patient’s health or allow a patient to be</td>
<td>speaking to a view-only audience</td>
</tr>
<tr>
<td>seen or heard</td>
<td>• Events up to 500 participants*</td>
</tr>
<tr>
<td>• Small to large group sessions where</td>
<td>• Events where no identifiable patient</td>
</tr>
<tr>
<td>participants should be able to interact and</td>
<td>information is shared</td>
</tr>
<tr>
<td>engage with each other</td>
<td>• Audience only needs to interact with the</td>
</tr>
<tr>
<td></td>
<td>panelists (e.g. Q&amp;A), not with one another</td>
</tr>
</tbody>
</table>

**Related resources**

- Zoom: [Meetings and webinars comparison](#)
- Convert webinars to meetings
- Virtual health Zoom security best practices
- For detailed instructions on scheduling/hosting meetings or webinars, including registration, see the full [Zoom manual](#).
- *For 500 – 1000 participants, see overview of [large-scale webinars](#).
## Feature comparison table

<table>
<thead>
<tr>
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<th>Meetings</th>
<th>Application</th>
<th>Webinars</th>
<th>Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Waiting rooms</td>
<td>✔️</td>
<td>Participants need to wait in the waiting room for the host (or any co-hosts/alternate hosts) to let them into the visit.</td>
<td>✗</td>
<td>Participants are automatically let into the webinar once it’s begun.</td>
</tr>
<tr>
<td>Audio &amp; video sharing</td>
<td>✔️</td>
<td>All participants can see and hear each other.</td>
<td>✗</td>
<td>Only the host and panelists can share audio and video, allowing the audience to see and hear them.</td>
</tr>
<tr>
<td>Screen sharing</td>
<td>✔️</td>
<td>If enabled, all participants can share their screen.</td>
<td>✗</td>
<td>Only the host and panelists can share screen.</td>
</tr>
<tr>
<td>Breakout rooms</td>
<td>✔️</td>
<td>Participants can be assigned to smaller rooms in a group visit for discussion.</td>
<td>✗</td>
<td>Not a feature.</td>
</tr>
<tr>
<td>Participant list</td>
<td>✔️</td>
<td>All participants can see the full meeting participant list. Participants can also rename themselves (e.g. pronouns, preferred name, first name only)</td>
<td>✗</td>
<td>Only the host and panelists can see the full participant list.</td>
</tr>
<tr>
<td>Chat</td>
<td>✔️</td>
<td>Questions and comments can be entered into the chat for everyone, and/or private messages between participants, to view.</td>
<td>✔️</td>
<td>Questions and comments can be entered into the chat for just the host and panelists, or everyone, to view.</td>
</tr>
<tr>
<td>Automated email reminders</td>
<td>✗</td>
<td>If registration is selected when scheduling, a Zoom confirmation email is sent to the participant. Additional reminder emails can be sent via Outlook.</td>
<td>✔️</td>
<td>If registration is selected.</td>
</tr>
<tr>
<td>Q&amp;A</td>
<td>✗</td>
<td>Not a feature.</td>
<td>✔️</td>
<td>Allows participants to ask questions directly to the host and panelists to answer.</td>
</tr>
</tbody>
</table>
# Zoom virtual health visits

## Scheduling

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<td>Assigning scheduling privileges to someone else</td>
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<tr>
<td>Scheduling a virtual health visit on behalf of someone else</td>
<td>40</td>
</tr>
</tbody>
</table>
# Web browser scheduling

## Requirements

- Use the **web browser** version of Zoom to access all scheduling options for virtual health visit meetings.
  - You can use the **desktop application** to schedule, but it does not include options for adding a meeting description, scheduling from a meeting template, or adding registration.
- Use **Google Chrome**.
- If a staff member is supporting a provider with scheduling, the provider must assign **scheduling privileges** to the staff member in advance.
- Enable meeting passcodes to be embedded in invitation URLs. This allows participants to click to join their visit.
  - Click on the **Settings** tab.
  - Scroll to **Embed passcode in invite link for one-click join** and toggle to ‘on.’

## Schedule the virtual health visit

1. Sign into your Zoom for Virtual Health Visits account on the web browser - [https://zoom.us/](https://zoom.us/)
2. Click on the **Meetings** tab.
3. Click **Schedule a Meeting**.
4. Complete virtual health visit **meeting details**.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Title of the virtual health visit</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>A description of the virtual health visit</td>
</tr>
<tr>
<td><strong>(optional)</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>When</strong></th>
<th>The intended date and start time of the virtual health visit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The Virtual health visit can be started before or after the start time</td>
</tr>
</tbody>
</table>
### Duration
- The intended length of the virtual health visit
- The virtual health visit will not automatically end after the duration time

### Registration (optional)
- Requires participants to register for the virtual health visit to receive the link to join
- See registration guide

### Schedule for
- Option to schedule the session on behalf of someone else, e.g. a provider
- See scheduling privileges guide

### Meeting ID
- Leave as Generate Automatically

### Template
- Select a template to schedule from
- See templates for scheduling virtual health visits guide

### Security – Passcode
- Permanently enabled for security purposes

### Security – Waiting Room
- Permanently enabled for security purposes
- See more details about waiting rooms

### Video
- Change to ‘on’ for host and participant

### Audio
- Leave as ‘Both’

### Meeting Options
- **Allow participants to join anytime** – permanently un-ticked; participants cannot bypass the waiting room.
- **Mute participants on entry** – leave as un-ticked to reduce participant audio issues
- **Approve or block entry for users from specific countries/regions** – leave as un-ticked in case participants are joining from abroad

### Purpose of the virtual health visit
- Select the purpose from the dropdown options

### Alternative Hosts
- The alternative host must have a Zoom for Virtual Health Visits account.
- Alternative hosts can:
  - Start the virtual health visit on behalf of the main host
  - Admit participants from the waiting room into the virtual health visit

---

5. Click **Save** when all virtual health visit meeting details are completed.
Invite participants to the virtual health visit

1. Click **Outlook Calendar (.ics)** to download a pre-populated Outlook calendar invitation.

   ![Outlook Calendar (.ics) button]

2. A file will begin downloading. Click the file when it is done downloading. An Outlook calendar invitation will open.

3. Click **Invite Attendees**.

4. Click **To**....

5. Enter participant(s), provider, and alternative host’s email addresses as **Resources**.
   - Participants are added as resources to protect the privacy of email addresses
   - If email addresses are entered as **Required** or **Optional**, they are exposed to all recipients of the invitation.

6. Click **OK**.
7. Click No on the pop up asking if you want to change the location of the event to the email addresses entered.
   - If you click Yes, any email addresses entered as resources appear as the location for the meeting.
8. Click Send to send the invitation.

Editing virtual health visits

6. Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/
7. Click on the Meetings tab. Under Upcoming, scheduled virtual health visits are listed.
8. Hover your cursor over the visit to be edited and click Edit.

9. Edit the virtual health visit meeting details as required.
10. Click Save when all changes details are completed.
    - The meeting link, ID, and passcode will remain the same.
11. Open Outlook Calendar event for the virtual health visit.
12. Edit the date and time of the invitation as required.
13. Click Send Update to send an updated invitation.
Cancelling virtual health visits

1. Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/
2. Click on the Meetings tab. Under Upcoming, scheduled virtual health visits are listed.
3. Hover your cursor over the visit to be cancelled and click Delete.
4. Click Delete to confirm you want to cancel the virtual health visit.
5. Open Outlook Calendar event for the virtual health visit.
6. Click Cancel Meeting.
7. Click Send Cancellation to send an email notification to all invitees. The calendar event will be deleted.
Desktop application scheduling

Requirements

- Use the **desktop application** to schedule virtual health visits if you do not need a meeting description, scheduling from a meeting template, or adding registration.
  - If any of these features are required, please use the **web browser** version of Zoom to access all scheduling options.
- If a staff member is supporting a provider with scheduling, the provider must assign **scheduling privileges** to the staff member in advance.
- Enable meeting passcodes to be embedded in invitation URLs. This allows participants to click to join their visit.
  - Click on the **Settings** tab.
  - Scroll to **Embed passcode in invite link for one-click join** and toggle to ‘on.’

**Schedule the virtual health visit**

1. Sign into your Zoom for Virtual Health Visits account on the desktop application.
2. Click **Schedule**.
3. Complete virtual health visit **meeting details**.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Title of the virtual health visit</th>
</tr>
</thead>
</table>
| Start                      | The intended date and start time of the virtual health visit  
                             | The Virtual health visit can be started before or after the start time |
| Duration                   | The intended length of the virtual health visit  
                             | The virtual health visit **will not** automatically end after the duration time |
| Recurring meeting          | Option to book virtual health visit as a recurring meeting |
| Schedule for               | Option to schedule the session on behalf of someone else, e.g. a provider  
                             | See [scheduling privileges guide](#) |
| Meeting ID                 | Leave as **Generate Automatically** |
| Passcode                   | Permanently enabled for security purposes |
| Waiting Room               | Permanently enabled for security purposes  
                             | See more details about [waiting rooms](#) |
| Video                      | Change to ‘on’ for host and participants |
| Audio                      | Leave as ‘Telephone and Computer Audio’ |
| Calendar                   | Leave as Outlook |
| **Purpose of the virtual health visit** | Select the purpose from the dropdown options |

**Advanced Options** (click title to expand menu)

- **Allow participants to join anytime** - permanently un-ticked; participants cannot bypass the waiting room
- **Mute participants on entry** – leave as un-ticked to reduce participant audio issues
- **Only authenticated users can join** – leave as un-ticked to allow participants to join without a Zoom account
- **Alternative hosts** - The alternative host must have a Zoom for Virtual Health Visits account. Alternative hosts can start the virtual health visit on behalf of the main host and admit participants from the waiting room into the virtual health visit.

4. Click **Save** when all virtual health visit meeting details are completed.
5. An **Outlook calendar invitation** will automatically open and populate.

**Invite participants to the virtual health visit**

1. Click **To**…
2. Enter participant(s), provider, and alternative host’s email addresses as **Resources**.  
   - Participants are added as resources to protect the privacy of email addresses  
   - If email addresses are entered as **Required** or **Optional**, they are exposed to all recipients of the invitation.
3. Click **OK**.
4. Click **No** on the pop up asking if you want to change the location of the event to the email addresses entered.
   - If you click **Yes**, any email addresses entered as resources appear as the location for the meeting.

5. Click **Send** to send the invitation.

**Editing virtual health visits**

1. If you have the [Zoom Outlook plugin](https://zoom.us) installed, you can edit the virtual health visit from within Outlook.
   - If you do not have the plugin installed, proceed with the steps below.
2. Sign into your Zoom for Virtual Health Visits account on the desktop application.
3. Click on the **Meetings** tab and select the virtual health visit you wish to edit.
4. Click **Edit**.
5. Edit the virtual health visit meeting details as required.
6. Click **Save** when all changes details are completed.
   - The meeting link, ID, and password will remain the same.
7. The **Outlook Calendar event** for the virtual health visit will open. If you changed the date and time, this should be automatically updated. Confirm all details are correct.
8. Click **Send Update** to send an updated invitation.
Cancelling virtual health visits

1. If you have the Zoom Outlook plugin installed, you can cancel the virtual health visit from within Outlook. If you do not have the plugin installed, proceed with the steps below.
2. Sign into your Zoom for Virtual Health Visits account on the desktop application.
3. Click on the Meetings tab and select the virtual health visit you wish to cancel.
4. Click Delete.
5. Click Yes to confirm you want to cancel the virtual health visit.
6. Open Outlook Calendar event for the cancelled virtual health visit.
7. Click Cancel Meeting.
8. Click Send Cancellation to send an email notification to all invitees. The calendar event will be deleted.
Outlook plugin scheduling

Purpose
The Microsoft Outlook (referred to as Outlook from here on) plugin for Zoom allows you to schedule and manage virtual health visit meetings from Outlook for your own account or on behalf of a provider.

The Outlook plugin can be used for:
- Scheduling one-to-one and group virtual health visit meetings for yourself or on behalf of a provider
- Assigning an alternative host to virtual health visit meetings
- Managing virtual health visit meetings as Zoom and Outlook delegates
- Inviting participants via Outlook invitation
- Sending email notification for changes or cancellations to virtual health visit meetings

The Outlook plugin can’t be used for:
- Scheduling virtual health visits as webinars
- Scheduling virtual health visit meetings requiring registration
- Scheduling virtual health visit meetings from a meeting template

How to request the Outlook plugin
- Submit an IMITS Self-Service Portal request → Make a request → Software – Install, Transfer, Remove → Complete the order form using these values:
  - Request Type: Order and Install Software
  - Did you find the software that you needed: No
  - Please detail the software you need: Zoom Outlook plugin
  - Install on Workstation Host Name: Your health authority PC or laptop number
    - It may take 4-6 weeks for your request to be processed.
    - To receive the plugin, the healthy authority (HA) device needs to be connected to the health authority network.

Requirements
- If a staff member is supporting a provider with scheduling, the provider must assign scheduling privileges to the staff member in advance.
- Enable meeting passcodes to be embedded in invitation URLs. This allows participants to click to join their visit.
  - Click on the Settings tab.
  - Scroll to Embed passcode in invite link for one-click join and toggle to ‘on.’
Schedule the virtual health visit

1. Open **Outlook Calendar** module.
2. Create a new calendar event with the date and time of the virtual health visit.
3. Click **Schedule a Meeting**.

4. Complete virtual health visit **meeting details**.

<table>
<thead>
<tr>
<th><strong>Meeting ID</strong></th>
<th>Leave as <strong>Generate Automatically</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Password</strong></td>
<td>Permanently enabled for security purposes</td>
</tr>
<tr>
<td><strong>Video</strong></td>
<td>Change to ‘on’ for host and participant</td>
</tr>
<tr>
<td><strong>Audio</strong></td>
<td>Change to ‘Telephone and Computer Audio’</td>
</tr>
<tr>
<td><strong>Purpose of the virtual health visit</strong></td>
<td>Select the purpose from the dropdown options</td>
</tr>
</tbody>
</table>
| **Advanced Options** (click to view options) | **Enable Waiting Room** – permanently enabled for security purposes  
**Enable join before host** – permanently un-ticked as participants must enter the waiting room before entering the virtual health visit  
**Mute participants upon entry** – leave as un-ticked to reduce participant audio issues  
**Only authenticated users can join: Sign in to Zoom** – leave as un-ticked to allow participants to join without a Zoom account  
**Force include Join URL in location field** – leave as unticked  
**Insert Zoom meeting invitation above existing text** - if ticked, invite is placed above any text you may have manually typed. If un-ticked, manually typed text appears above the invitation  
**Schedule for** - Option to schedule the session on behalf of someone else, e.g. a provider. See [scheduling privileges guide](#). |
Alternative hosts - Assign an ‘alternative host’ to start the virtual health visit on behalf of the provider. The alternative host must have a Zoom for Virtual Health Visits account.

5. Click **Continue**. The Zoom invitation will populate.
6. Edit the **Subject** for the virtual health visit if required.
7. Add any text below the invitation information if required.

**Invite participants to the virtual health visit meeting**

1. Click **Invite Attendees**.
2. Click **To…**.
3. Enter participant(s), provider, and alternative host’s email addresses as **Resources**.
   - Participants are added as resources to protect the privacy of email addresses
   - If email addresses are entered as **Required** or **Optional**, they are exposed to all recipients of the invitation.
4. Click **OK**.
5. Click **No** on the pop up asking if you want to change the location of the event to the email addresses entered.
   - If you click **Yes**, any email addresses entered as resources appear as the location for the meeting.
6. Click **Send** to send the invitation.

The virtual health visit scheduled through Outlook will also appear in the ‘Meetings’ tab in the Zoom desktop application.

**Editing virtual health visits**

1. Open **Outlook Calendar event** for the virtual health visit.
2. Edit the **date and time** of the invitation as required.
3. If required, click **Change Settings** to change the virtual health visit settings.
4. Click **Send Update** to send an updated invitation.

Changes to the virtual health visit will automatically reflect in the ‘Meetings’ tab in the Zoom desktop application.

**NOTE:** If you edit the virtual health visit from the Zoom desktop application instead of Outlook, the Outlook calendar event will not update automatically. A new Outlook calendar event with the modified details will generate. We recommend deleting the new calendar event and modifying the original as described below.
Cancelling virtual health visits

1. Open **Outlook Calendar event** for the virtual health visit.

2. Click **Cancel Meeting**.

3. Click **Got it** on the pop up advising the meeting can be recovered in the web browser.

4. Click **Send Cancellation** to send an email notification to all invitees. The calendar event will be deleted.

The cancelled virtual health visit will automatically be removed from the 'Meetings' tab in the Zoom desktop application.

**NOTE:** If you cancel/delete the virtual health visit from the Zoom desktop application instead of Outlook, the Outlook calendar event will not be automatically deleted. You must go back to the Outlook calendar event to cancel and send the cancellation as described above.
Registration for virtual health visits

Purpose
Scheduling a virtual health visit requiring registration can provide confirmation that a participant plans to attend their virtual health visit. The organizer of the virtual health visit will be able to see a list of registrants and know who to expect. Registration may be most helpful for group virtual health visits.

Registration also allows participants to receive automated scheduling updates via email from Zoom.

Requirements
- Use the [web browser](http://zoom.com) version of Zoom to schedule a virtual health visit with registration.
  - The [desktop application](http://zoom.com) does not include this option.

Schedule the virtual health visit with registration required
1. Follow [steps 1-4](#) to schedule the virtual health visit.
2. Tick the **Required** box in the Registration section.
3. Click **Save** when all virtual health visit meeting details are completed.
4. Click **Outlook Calendar (.ics)** to download a pre-populated Outlook calendar event.
5. A file will begin downloading. Click the file when it is done downloading. An Outlook calendar event will open.
6. Click **Save & Close** to add the event to your calendar.
Set up registration requirements

1. On the web browser, scroll down to Registration section.

2. Click Edit next to Registration Options.

3. Adjust the registration settings to your preference. We recommend the following:

4. Click the Questions tab to modify registration questions.
   - **For 1:1 visits:** We recommend leaving the questions as is, i.e. the participant is required to provide their first and last name and email address.
   - **For group visits:** Consider making ‘Last Name’ not required as the name entered displays on the Participants list during the visit. The meeting host can change a participant’s name if required. Other details collected on the registration form can only be seen by the host.

5. Click the Custom Questions tab to create your own registration questions, if required.

6. Click Save All.
Invite participants to register for the virtual health visit

1. Scroll back up to the **Registration Link**.
2. Click **Copy Invitation** and then **Copy Meeting Invitation**.

![Copy Meeting Invitation](image)

3. Open **Outlook**.
4. Create a **new email message**.
5. **Paste** the meeting invitation into the email.
   
   Please note, this is **not the link to join** the virtual health visit. The participant must register for their virtual health visit in order to receive the link to join the visit.

6. Invite participants to register for the virtual health visit:
   - If conducting a **1:1 virtual health visit**, enter the participant’s email address in the ‘To’ field.
   - If conducting a **group virtual health visit**, enter the participants’ email addresses in the ‘Bcc’ field to protect privacy.

7. **Send** the email.
Checking the registration status for the virtual health visit

1. Sign into your Zoom for virtual health visits account on the web browser - [https://zoom.us/](https://zoom.us/)
2. Click on the **Meetings** tab. Under **Upcoming**, scheduled virtual health visits are listed.
3. Click the name of the visit with registration.
4. Scroll down to **Registration**.
5. The number of attendees registered will appear. Alternatively, click **View** to view the detailed list of registrants.
Templates for scheduling virtual health visits

Purpose
A meeting template allows you to save certain details of a previously scheduled virtual health visit and apply it to future virtual health visits. You can save up to 40 meeting templates.

Requirements
- Use the web browser version of Zoom to create meeting templates and schedule using meeting templates.
  - The desktop application does not include this option.

Schedule the virtual health visit
1. Follow steps 1-5 to schedule the virtual health visit.
2. If polls are required, you can create questions and answers in advance. This saves to the template.
3. If registration is required, adjust Registration options. This saves to the template.

Save the virtual health visit as a meeting template
1. Click Save as a Meeting Template.
2. Modify the meeting template name as required.
3. Click **Save as Template**.

![Save as Meeting Template](image)

4. The meeting details saved to the template include:

<table>
<thead>
<tr>
<th>Meeting details applied from template: (Can be edited as required)</th>
<th>Meeting details not applied from template: (Must be manually entered for every meeting)</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Topic</td>
<td>- Date and time</td>
</tr>
<tr>
<td>- Description</td>
<td>- Scheduled for</td>
</tr>
<tr>
<td>- Recurrence</td>
<td>- Alternative hosts</td>
</tr>
<tr>
<td>- Registration preference</td>
<td>- Purpose of virtual health visit</td>
</tr>
<tr>
<td>- Video</td>
<td></td>
</tr>
<tr>
<td>- Audio</td>
<td></td>
</tr>
<tr>
<td>- Meeting options</td>
<td></td>
</tr>
<tr>
<td>- Date and time</td>
<td></td>
</tr>
<tr>
<td>- Scheduled for</td>
<td></td>
</tr>
<tr>
<td>- Alternative hosts</td>
<td></td>
</tr>
<tr>
<td>- Purpose of virtual health visit</td>
<td></td>
</tr>
</tbody>
</table>

5. Finish the remaining scheduling activities for the virtual health visit, e.g. inviting participants.

**Schedule a new virtual health visit using a meeting template**

1. Follow steps 1-3 to schedule the virtual health visit.
2. In the **Template** field, select your meeting template.

![Select a Template](image)

3. Re-check the meeting details.
4. Click **Save** when all virtual health visit meeting details are completed.
5. Adjust template **poll** questions and answers if required.
6. Adjust template **Registration options** if applicable and required.
7. Finish the remaining scheduling activities for the virtual health visit, e.g. inviting participants.

**Editing meeting templates**

1. Sign into your Zoom for virtual health visits account on the web browser - [https://zoom.us/](https://zoom.us/)
2. Click on the **Meetings** tab.
3. Click **Meeting Templates**.
4. Click the name of the template you wish to edit.

5. Click **Edit this Meeting Template** and edit details such as topic, description, recurrence, purpose of the virtual health visit, etc.

6. Make all required changes and click **Save**.
7. If applicable, click the **Edit** button within **Registration** and **Poll** to edit details.
Deleting meeting templates

1. Sign into your Zoom for virtual health visits account on the web browser - https://zoom.us/
2. Click on the Meetings tab.
3. Click Meeting Templates.
4. Click Delete for the template you wish to delete.
5. Click Delete again to confirm you want to delete the template.
Assigning scheduling privileges

**Purpose**

- Assign or delegate a user or multiple users in your account to schedule virtual health visits on your behalf, e.g. provider assigns scheduling privilege to those supporting scheduling.
- Allow users with scheduling privilege on your account to manage and act as an alternative host for all virtual health visits.
- Alternative hosts can:
  - Start the virtual health visit on behalf of the main host
  - Admit participants from the waiting room into the virtual health visit

**Requirements**

- The user assigning privileges and user receiving privileges must have an account provisioned under Zoom for Virtual Health Visits instance.
- Use the **web browser** version of Zoom to assign scheduling privileges. This cannot be done through the desktop application or mobile app.

Assigning scheduling privileges to someone else

1. Sign into your Zoom for Virtual Health Visits account on the web browser - [https://zoom.us/](https://zoom.us/)
2. Click **Settings**.
3. Scroll to **Schedule Privilege**.
4. Click the + sign next to **Assign scheduling privilege to**.
5. Enter one or more email addresses in the window, separated with a comma.
   - If scheduling privileges cannot be assigned, an error message will appear.
6. Click **Assign**.
The user with newly assigned privileges needs to sign out of their account on the web browser and desktop client and sign in again before they are able to schedule for someone else.

**Scheduling a virtual health visit on behalf of someone else**

Note: for complete scheduling instructions, please see [Scheduling Zoom virtual health visits](#).

1. Look for the **Schedule For** section when scheduling a virtual health visit.
2. Select the user you want to schedule on behalf of.
3. Finish the remaining scheduling activities for the virtual health visit, e.g. inviting participants.
Zoom Virtual Health Visits

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Hosting with the desktop application

**Recommendations**

- Use the **Zoom desktop application** to host one-to-one or group virtual health visits.
- Do not use the web browser to conduct virtual health visits as visit quality may not be optimal.
- Review the [webside manner and etiquette](#) for virtual health visits.
- See Appendix 4 to review an infographic on assistance managing virtual health visits. The text is also summarized below in Notes.

**Notes**

- Anyone with **scheduling privileges** to your account can start the virtual health visit on your behalf because they are automatically assigned the role of **alternative host**.
  - This means they can also manage and admit participants in the waiting room.
- If you assigned an **alternative host(s)** when scheduling, they can start the virtual health visit on your behalf.
  - The alternative host can manage and admit participants from the waiting room.
- A **co-host** can be assigned after starting the virtual health visit if you did not assign an alternative host or have anyone with scheduling privileges to your account.
  - You cannot assign a co-host before starting a virtual health visit. Therefore, a co-host cannot start the virtual health visit on your behalf.
  - The co-host can, however, manage and admit participants in the waiting room.
  - To assign a co-host:
    - Open the **Participants** window from the toolbar.
    - Hover over participant’s name and click **More**.
    - Click **Make Co-Host**.

**Starting a scheduled virtual health visit**

1. Open the Zoom **desktop application** and sign into your Zoom for Virtual Health Visits account.
2. Click **Meetings**.
3. Click the name of the meeting you wish to start.
4. Click **Start**.
5. Select to **Join with Computer Audio** if you have a microphone and speaker connected. We recommend using a headset.
   - You can save this preference for future Virtual health visits by checking the box to **Automatically join audio by computer when joining a meeting**.
Starting an instant/ad-hoc virtual health visit

1. Open the Zoom desktop application and sign into your Zoom for Virtual Health Visits account.
2. Click the New Meetings.

3. Select to Join with Computer Audio if you have a microphone and speaker connected. We recommend using a headset.
   - You can save this preference for future virtual health visits by checking the box to Automatically join audio by computer when joining a meeting.
Waiting rooms

Waiting rooms are permanently enabled on the Zoom for Virtual Health Visits instance for enhanced security.

With waiting rooms, the host and co-hosts control when participants enter the virtual health visit. Participants can be admitted one by one or all at the same time. If an interpreter is joining your virtual health visit, they will need to be admitted from the waiting room as well. Hosts can also message participants in the waiting room and participants can reply back, allowing for two-way communication.

If you would like to, or not like to, hear a sound notification when someone enters the waiting room, adjust your Zoom for Virtual Health Visits account settings.

After starting the virtual health visit:

1. Click Participants to view who is in the waiting room.
2. If needed, click Message to send a message to all participants in the waiting room.
3. Hover over the participant’s name to admit them.
   - Alternatively, click Admit all to admit all participants at once.
   - You can also remove someone from a waiting room by clicking Remove. Participants will (or will not) be able to rejoin based on your setting for Allow removed participants to rejoin.
4. Confirm the identity of the virtual health visit participants.
   - If conducting a one-to-one virtual health visit, you can use the audio and video to talk to the patient instead of using chat.
   - If conducting a group virtual health visit, you can admit participants one-by-one and use audio and video to confirm their identity OR you can open a private chat with each participant.
5. **Recommended**: Lock the virtual health visit after all participants have joined*.

   - Click **Security** and select **Lock Meeting**.
   - *If a participant accidentally leaves the virtual health visit, they will not be able to enter the waiting room until the meeting is unlocked. Be mindful if the number of participants suddenly drops. You may need to unlock the virtual health visit.
Inviting participants to join via phone

**Purpose**
You can invite participants to join by phone during an in-progress virtual health visit. The participant will have audio only and will be unable to view your video. This may be useful in the event that the participant does not have access to a device with video capability, or for specific clinical workflows.

If the participant does have a device with video capability, the host may also convert this audio call to a video call during the virtual health visit if necessary.

**Requirements**
- Use the desktop or mobile application.

---

**Invite participants to join via phone**

1. **Start** the virtual health visit on your computer or mobile device.
2. **Click Invite** participants – this can be done in 2 ways:
   a. Click on the up arrow beside the Participants button, then click Invite, or;
   b. Click on the Participants button to open the sidebar, then click Invite at the bottom left.

3. A dialog box will appear. Click on the Phone tab.
4. Enter the name of the participant you are calling in the **Invitee** field.

   For group virtual health visits, we recommend participants do not add their full name (e.g. Jane D.)

5. Enter the **10 digit phone number** for the participant.
6. Click **Invite**.
7. Participant will see an incoming call from an unknown number (often an Ontario number).

   Inform the participant ahead of time so that the call is not blocked or mistaken as spam.

8. Participant answers the call and presses **1** to join the virtual health visit.
9. Host clicks **Admit** once the participant enters the waiting room.
Convert phone call to Zoom video-enabled virtual health visit

**Purpose**
During a virtual health visit where the participant has initially joined via phone audio only, the host may convert the audio call to a video-enabled visit if necessary. This process can be followed without ending the original audio-only virtual health visit. This may be useful in the event that the participant did not initially have access to a device with video capability, or for specific clinical workflows.

**Requirements**
- Participant should have access to the Internet (Google Chrome is recommended), a microphone, speaker, and camera.
- The host should be using the desktop or mobile application.

Convert phone call to video call

The host or participant may wish to convert the participants’ phone call to a Zoom video call during the virtual health visit.

1. **While connected over the phone**, the host provides the virtual health visit information (i.e. invitation link, meeting ID and passcode) to the participant. This information can be found in 2 places:
   a. Click the green icon at the top left of the Zoom window. A black dialog box will open.
b. Click on the **Participants** button to open the sidebar, then click **Invite**. A dialog box will open with the meeting ID and passcode along the top and bottom. You can also email the participant by copying the invitation link or sending the entire email invitation.

![Image of Zoom interface](image_url)

2. If the participant has received the email invitation, the participant can just click on the invitation link to launch the virtual health visit and be admitted into the waiting room.

3. If the participant has **not** received the email invitation, instruct the participant to launch their web browser (zoom.us), desktop, or mobile app, and do the following:
   a. Click on **Join Meeting**.
   b. Enter their **Meeting ID**.
   c. Enter their **passcode**.
   d. They will be admitted into the **waiting room**.

4. **Admit** the participant from the waiting room.

5. After confirming the participants' audio and video are working, the participant may now **disconnect** from their original phone call.
Hosting with smartphones/tablets

Recommendations

- Use the **Zoom Cloud Meetings app** to host one-to-one virtual health visits.
- For optimal hosting experience, please use the Zoom desktop application to host group virtual health visits. The Zoom Cloud Meetings app does not have all functions that may be required for group visits, such as polling and breakout rooms.
- Review the [webseite manner and etiquette](#) for virtual health visits.

### Download Zoom Cloud Meetings app

<table>
<thead>
<tr>
<th>Platform</th>
<th>Requirements</th>
<th>Compatibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apple iOS</strong></td>
<td>Requires iOS 8.0 or later.</td>
<td>Compatible with iPhone, iPad, and iPod touch.</td>
</tr>
<tr>
<td><strong>Android</strong></td>
<td>Requires Android 5.0 and up</td>
<td></td>
</tr>
</tbody>
</table>

### Starting a scheduled virtual health visit

1. Open the **Zoom Cloud Meetings app** and sign into your Zoom for Virtual Health Visits account.
2. Tap **Meetings**.
3. Tap **Start** next to upcoming virtual health visit.
4. If you are using Zoom on a device for the first time, allow access to your camera and microphone.
5. Select **Call using internet audio**.
Starting an instant/ad-hoc virtual health visit

1. Open the **Zoom Cloud Meetings app** and sign into your Zoom for Virtual Health Visits account.
2. Tap **New Meeting**.
3. Select if you want to start the meeting with your video on and use your Personal Meeting ID (PMI).
4. Tap **Start a Meeting**.
5. If you are using Zoom on a device for the first time, **allow access to your camera and microphone**.
6. Select **Call using internet audio**.
Waiting Rooms

Waiting rooms are permanently enabled on the Zoom for Virtual Health Visits instance for enhanced security.

With waiting rooms, the host controls when participants enter the virtual health visit. Participants can be admitted one by one or all at the same time. If an interpreter is joining your virtual health visit, they will need to be admitted from the waiting room as well. Hosts can also message participants while they are in the waiting room; however, participants can not message back.

If you would like to, or not like to, hear a sound notification when some enters the waiting room, adjust your Zoom for Virtual Health Visits account settings.

After starting the virtual health visit:

1. From the toolbar, tap **Participants** to view who is in the waiting room.
2. If needed, send a **message** to all participants in the waiting room.
   - From the toolbar, tap **More**.
   - Tap **Chat**.
   - Send to **Everyone (in Waiting Room)**
   - Type your message and send.
3. Tap **Admit** next to the participant’s name.
4. **Confirm the identity** of the virtual health visit participant.
5. **Recommended**: Lock the virtual health visit after all participants have joined*.
   - From the toolbar, tap **More**.
   - Tap **Security**.
   - Toggle **Lock Meeting** to ‘on’.
   - Tap **Done** to return to the visit.

*If a participant accidentally leaves the virtual health visit, they will not be able to enter the waiting room until the meeting is unlocked. Be mindful if the number of participants suddenly drops. You may need to unlock the virtual health visit.
Meeting controls and options on a phone/tablet

1. Audio
   - Mute and unmute microphone

2. Video
   - Start and stop video

3. Share screen
   - Select a content source to share from the device

4. Participants
   - View participants in the virtual health visit
   - View and admit participants in the waiting room
   - Tap participant’s name to manage participant
   - Tap Invite to invite additional participants

5. More
   - Open the Security menu to lock the meeting
   - Open the Chat
     - Take note of who is receiving the message, i.e. everyone vs. a private chat with a specific participant
   - Open Meeting Settings
   - Choose a Virtual Background

6. End the virtual health visit
   - If the virtual health visit is finished, click End the Meeting for All.
   - Alternatively, if you are the only person leaving the meeting, click Leave the Meeting and assign a new host before you leave.
Zoom Virtual Health Visits

Joining

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  Join your virtual health visit............................................................... 60
  Allow Zoom to use your microphone and camera................................. 62
  Meeting controls and options........................................................................... 63
Joining from a computer

Information Resources
https://tinyurl.com/phsazoompt

Technical Support
If you are a patient, please contact the patient helpdesk. Contact information can be found in your virtual health visit invitation.

If you are a health authority staff member, please contact your respective Service Desk.

Run a test before your visit
https://zoom.us/test

Do you need a Zoom for Virtual Health Visits account to join?
No! You can join without an account. An account is only required to host the virtual health visit.

Join your virtual health visit

1. Check your email inbox and junk box for a virtual health visit invite.
2. Click the URL link to join your visit. You do not need a Zoom account to join.

3. If this is the first time you are using Zoom, the Zoom Client for Meetings desktop software will automatically begin downloading.
   - Click on the file (bottom-left corner) when it is done downloading.
   - Click Run to complete the installation.
4. If you cannot download or run the desktop software:
   - Download the Zoom Cloud Meetings app on your Apple/Android smartphone or tablet to join, or
   - Click Join from Your web Browser using Google Chrome, Safari, Firefox, or Edge.
5. You will be assigned to a waiting room or be placed on hold until the host starts the virtual health visit. Please wait.
Choose your audio settings

Depending on your computer set up, you have two options for how to speak to and hear your provider.

1. Use computer audio
   - This uses your computer’s microphone and speakers.
   - If this is always your preferred option, tick the box to **Automatically join audio by computer when joining a meeting**.

2. Use the phone
   - This provides a phone number for you to call in to the visit in addition to using the computer video. You can also find this phone number on your invitation.
   - We suggest this option if your computer does not have audio or the quality is poor.
Meeting controls and options

Click to open the chat function.
Click in the ‘Type messages here...’ field to type a message. Then hit ‘enter’ to send.
Click icon again to close the chat. If you receive a chat message, a red bubble with a number will appear on the chat button.

Click to unmute and mute your microphone
Click to start and stop your video

Click to leave the virtual health visit when it is finished
Joining from a smartphone or tablet

Download the ‘Zoom Cloud Meetings’ app.

<table>
<thead>
<tr>
<th>Apple iOS: Needs iOS 8.0 or higher. Compatible with iPhone, iPad and iPod touch.</th>
<th>Android: Needs Android 5.0 or higher.</th>
</tr>
</thead>
<tbody>
<tr>
<td>apps.apple.com</td>
<td>play.google.com</td>
</tr>
</tbody>
</table>

Information Resources
https://tinyurl.com/phsazoompt

Technical Support
If you are a patient, please contact the patient helpdesk. Contact information can be found in your virtual health visit invitation.

If you are a health authority staff member, please contact your respective Service Desk.

Run a test before your visit
https://zoom.us/test

Do you need a Zoom for Virtual Health Visits account to join?
No! You can join without an account. An account is only required to host the virtual health visit.

Join your virtual health visit

1. Check your email inbox and junk box for a virtual health visit invite.

2. Tap the URL link to join your visit. You do not need a Zoom account to join.

   Hello, 
   You are invited to a Zoom Virtual Health Visit. 
   Join the Virtual Health Visit 
   https://phsa.zoom.us/j/64866651514?pwd=smHqVVDlU5dY3GyH4k2b1jpoXNucilNdzr09 
   Meeting ID: 648 6665 1514 
   Password: 004993 
   Can’t join by computer or mobile device? Join by telephone: 
   1833 955 1083 (Toll-free)

3. A. If your device already has the Zoom Cloud Meetings app, it will open automatically.

   B. If your device does not have the Zoom Cloud Meetings app, your browser will open with a link to download it from the app store.
   - Download the free Zoom Cloud Meetings app and go back to your virtual health visit invite and tap the URL link again.
4. If you cannot download or run the mobile app:
   - Join from a computer or laptop by downloading the Zoom Client for Meetings, or
   - Join from a computer or laptop web browser in Google Chrome, Safari, Firefox, or Edge.

5. Enter your name, as recognized by the virtual health visit host.

6. You will be assigned to a waiting room or be placed on hold until the host starts the virtual health visit. Please wait.
Allow Zoom to use your microphone and camera
(only needs to be done the first time you use the app)

After being admitted into the virtual health visit:

1. Tap OK to allow Zoom to use your microphone so your provider can hear you.

2. Tap Call using Internet Audio so you can hear your provider.

3. Tap OK to allow Zoom to use your camera so your provider can see you.
Meeting controls and options

12:10

- Tap to **leave** the virtual health visit when it is finished

- Your camera

- Your provider

- Tap to **unmute** and **mute** your microphone

- Tap to **start** and **stop** your video

- Tap to open the **Chat**.
  Type your message then tap ‘**send**’.
Zoom Webinars

Scheduling

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Web browser webinar scheduling

Purpose
Webinars are designed so that only the host and any designated panelists (presenters) can share their video, audio and screen. Webinars allow view-only attendees that have the ability to interact with the panelists via Q&A, chat, and answering polling questions.

Webinars can be used for:
- Events up to 500 participants*
- Events where no identifiable patient information is shared
- One or a few people (“panelists”) speaking to an audience
- A view-only audience that only needs to interact with the panelists, not with each other

Webinars can’t be used for:
- Virtual health visits that directly address a patient’s health or allow a patient to be seen or heard. These should be conducted as meetings.

Requirements
- Use the web browser (Google Chrome) version of Zoom to schedule the webinar.
- Scheduling privileges and passcode settings remain the same as for meetings – see web browser scheduling requirements.

*For 500 – 1000 participants, see guide for large-scale webinars.

Schedule the virtual health visit as a webinar
1. Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/
2. Click on the Webinars tab.
3. Click Schedule a Webinar.
4. Complete virtual health visit webinar details.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Title of the webinar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description (optional)</td>
<td>A description of the webinar</td>
</tr>
<tr>
<td>When</td>
<td>The intended date and start time</td>
</tr>
<tr>
<td><strong>Duration</strong></td>
<td>The intended length of the webinar. The webinar will not automatically end after the duration time.</td>
</tr>
<tr>
<td>--------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Registration (required)</strong></td>
<td>Requires participants to register for the webinar to receive the link to join. See registration guide.</td>
</tr>
<tr>
<td><strong>Schedule for</strong></td>
<td>Option to schedule the webinar on behalf of someone else, e.g. a provider. See scheduling privileges guide.</td>
</tr>
<tr>
<td><strong>Template</strong></td>
<td>Select a template to schedule from. See templates for scheduling virtual health visits guide.</td>
</tr>
<tr>
<td><strong>Security – Passcode</strong></td>
<td>Permanently enabled for security purposes.</td>
</tr>
<tr>
<td><strong>Video</strong></td>
<td>Change to ‘on’ for host and panelist.</td>
</tr>
<tr>
<td><strong>Audio</strong></td>
<td>Leave as ‘Both’.</td>
</tr>
<tr>
<td><strong>Webinar Options</strong></td>
<td>Q&amp;A – allow question and answer sessions. Enable practice session. Requires authentication to join. Approve or block entry for users from specific countries/regions.</td>
</tr>
<tr>
<td><strong>Purpose of the virtual health visit</strong></td>
<td>Select ‘patient education’ from the purpose drop down options.</td>
</tr>
<tr>
<td><strong>Alternative Hosts</strong></td>
<td>The alternative host must have a Zoom for Virtual Health Visits account. Alternative hosts can: o Start the webinar on behalf of the main host o Admit participants from the waiting room into the webinar.</td>
</tr>
</tbody>
</table>

5. Click **Save** when all webinar details are completed.

**Set registration and limit participant number**

1. Scroll down to the bottom and click the **Invitations** tab.

2. Click **Edit** Registration Settings.
3. **Check Required** under Registration.
4. **Check Restrict number of registrants** and set limit to 500 or less (for 500 – 1000 see [large-scale webinars](#)).

5. **Click Save all.**
Set up an automatic email reminder

1. Click Email Settings.
2. Click Edit next to No reminder email to Attendees and Panelists to adjust the settings.

3. Select the reminder option(s) you prefer.

4. Click Save.

Set up Q&A

1. Click Q&A.
2. Click Edit next to Settings.
3. https://zoom.us/Select if you want to allow anonymous questions during Q&A and if participants can view all questions or only answered questions. If you choose for attendees to view all questions, you can also allow attendees to upvote questions and provide comments.

![Host should remind attendees to avoid sharing any identifiable information during Q&A.]

4. Click **Save**.

**Invite panelists to the webinar**

**Panelists** are full participants in the webinar who can view and send video, screen share, etc. Panelists count towards the maximum number of attendees for your webinar. Please note that panelists will receive a direct email invitation separate from the attendees of the webinar.

1. In the Zoom web browser, click **Webinars**.
2. Click the topic of the webinar you want to add panelists to.

![Webinars section in Zoom](image)

3. In the **Invitations** tab, select the **Edit** button in the **Invite panelists** section.
4. Enter a name and email address to invite them.

Panelists

Invite a person or a Zoom room as a webinar panelist

<table>
<thead>
<tr>
<th>Name</th>
<th>Email/Zoom Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cecilia Kim</td>
<td><a href="mailto:cecilia.kim@phsa.ca">cecilia.kim@phsa.ca</a></td>
</tr>
<tr>
<td>Jane Doe</td>
<td>Email Address</td>
</tr>
</tbody>
</table>

Add Another Panelist

5. Select Add Another Panelist to add more panelists. Press Save to send invites to the new panelists entered.

6. If you checked Send invitation to all newly added panelists immediately, they will be sent an email invitation after you click Save.
**Invite attendees to the webinar**

Webinar attendees are view-only participants who can be unmuted if the host chooses. Their view of the webinar is controlled by the host. They can interact with the host and the panelists through the Q&A, chat, and polling. To protect the participants privacy, it is recommended that attendees do not interact each other.

Registration is recommended for webinars hosted with your Zoom for Virtual Health Visits account. The host will need to share the registration link and have the attendees complete the registration form. Once registered, they will receive an email notification with a unique join link.

1. In the Zoom web browser, click **Webinars**.
2. Click the topic of the webinar you want to add attendees to.

3. In the **Invitations** tab, there are three different ways to invite attendees to register:
   - Copy the registration URL and share via email or other communication method.
   - Select **Copy the invitation** to view and copy the invitation created by Zoom to send out to your attendees.
   - Select **Send Invitation to Me** to receive a copy of the Zoom invitation that you can then forward to attendees.

4. If you are planning to share your event publicly, please connect with your communications team and follow the appropriate communication policies.

   These events should not be posted on private social media accounts.
Large-scale webinars

Purpose
The maximum number of participants for a standard virtual health visit or webinar is 500 participants. However, there may be occasions where a virtual event needs to be conducted for >500 participants. This instruction reviews the steps required to obtain temporary privileges for a large-scale webinar through the Office of Virtual Health.

Potential use cases include large healthcare education events for patients and families.

Large-scale webinars can be used for:
- Events of 500 - 1000 participants
- Events where no identifiable patient information is shared
- One or a few people (“panelists”) speaking to an audience
- A view-only audience that only needs to interact with the panelists, not with each other

Large-scale webinars can’t be used for:
- Virtual health visits that directly address a patient’s health or allow a patient to be seen or heard. These should be conducted as meetings.

Requirements
- Use the web browser (Google Chrome) version of Zoom to schedule the webinar.
- Scheduling privileges and passcode settings remain the same as for meetings – see web browser scheduling requirements.

Prior to the webinar
1. Schedule the webinar at least 1 week prior to the required date using the instructions above. Limit registration size to 1000 – a notification will appear saying that the webinar only supports 500 attendees. Disregard this message for now.
2. **Save** webinar details.

   ![Registration settings](image)

   - **Do not send** registration link out to participants yet.

3. Email [ovhzoomsupport@phsa.ca](mailto:ovhzoomsupport@phsa.ca) with the following details to request and book your one-time large scale webinar license:
   a. **Proposed webinar date & time**
   b. **Webinar ID**
   c. **Host name**
   d. **Purpose of event**

4. Once you receive a confirmation email, you may now send the registration link to participants.

   ![Warning](image)

   **In the event your license request is declined (due to a scheduling conflict, it does not meet the requirements, or for any other reason) go back into the webinar settings and change the maximum registrant number back to 500.**
Day of the webinar

1. At least 2 hours prior to the event, email ovhzoomsupport@phsa.ca to confirm it is proceeding as planned. The license must be temporarily assigned to you on the day of the event.

2. You will receive a confirmation email. You may also check your profile to see that your webinar license type has been updated to 1000 participants for Webinars:

3. Host your large-scale webinar.
4. After the event, your license will be converted back to the regular webinar size of 500.
Converting a Zoom webinar to a meeting

**Purpose**
- Webinars are designed so that only the host and any designated panelists (presenters) can share their video, audio and screen. Webinars allow view-only attendees that have the ability to interact with the panelists via Q&A, chat, and answering polling questions.
- For best privacy and security practice, all virtual health visits that directly address a patient’s health or allow a patient to be seen or heard should be conducted as Meetings.
- If you have scheduled a virtual health visit as a webinar that is more appropriate as a meeting, you can convert the webinar to a meeting within the Zoom web portal.

**Requirements**
- Use the web browser version of Zoom to convert webinars to meetings. This cannot be done through the desktop client or mobile app.

Converting the virtual health visit to a meeting

1. Sign into your Zoom for Healthcare account on the web browser - [https://zoom.us/](https://zoom.us/)
2. Click **Webinars** in the left-hand panel.
3. Click the **name of the webinar** you want to convert.
4. Locate the option for **Want a meeting instead of a webinar?** and click **Convert this Webinar to a Meeting**.
5. Click **Convert** to confirm you want to convert the webinar to a meeting.
Do the meeting ID, password, or click to join links change after the conversion?

No, all details remain the same. This also means that anyone with the original webinar link can still use it to join the meeting. Any Q&A, multiple-answer questions, webinar related email settings, branding, and surveys, however, will be lost.

**Patients were invited to the virtual health visit as webinar panelists. Do I need to let them know the meeting changed from a webinar to a meeting?**

Patients invited as webinar panelists can still use their original virtual health visit invitation to join the meeting, therefore the conversion is seamless for the patient. You do not need to let them know about the conversion. They will not receive any automated notification from Zoom letting them know about the conversion either.

**Will patients still receive an automatic email reminder after converting the webinar into a meeting?**

No, automatic email reminders are lost after the conversion as they are not a feature of meetings.

**What’s different for patients in a meeting versus a webinar?**

See section on [Zoom meetings vs. webinars](#).
Zoom Webinars

Hosting

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Hosting with the desktop application

**Recommendations**
- Use the **Zoom desktop application** to host webinars.
- Do not use the web browser to conduct webinars as visit quality may not be optimal.
- Review the **website manner and etiquette** for virtual health visits.
- See **Appendix 5** to review an infographic on assistance managing virtual health visits. The text is also summarized below in Notes.

**Notes**
- Anyone with **scheduling privileges** to your account can start the virtual health visit on your behalf because they are automatically assigned the role of **alternative host**.
- If you assigned others as **alternative host(s)** when scheduling, they can start the virtual health visit on your behalf.
- A **co-host** can be assigned after starting the virtual health visit if you did not assign an alternative host or have anyone with scheduling privileges to your account.
  - You cannot assign a co-host before starting a virtual health visit. Therefore, a co-host cannot start the virtual health visit on your behalf.
  - To assign a co-host:
    - Open the **Participants** window from the toolbar.
    - Hover over participant’s name and click **More**.
    - Click **Make Co-Host**.

**Starting a scheduled webinar**
1. Open the Zoom **desktop application** and sign into your Zoom for Virtual Health Visits account.
2. Click **Meetings**.
3. Click the name of the webinar you wish to start.
4. Click **Start**.

![Zoom meeting interface showing how to start a webinar](image-url)
5. Select to **Join with Computer Audio** if you have a microphone and speaker connected. We recommend using a headset.

- You can save this preference for future Virtual health visits by checking the box to **Automatically join audio by computer when joining a meeting**.
Managing Q&A and chat during a webinar

**Purpose**
The question & answer (Q&A) feature for webinars allows attendees to ask questions during the webinar, and for the panelists, co-hosts, and host to answer their questions live or as a typed response. The chat feature also allows attendees to interact with the panelists by typing their comments or questions in the chat window.

For best privacy and security practices, it is recommended that questions be submitted anonymously and chat is limited to between attendees and panelists only, not between attendees.

**Requirements**
- Q&A is enabled for the webinar under Webinar Options. See [Set Up Q&A](#).
- Option for anonymous questions should be enabled. See [Set Up Q&A](#).

**Answering questions**

1. As the host, co-host, or panelist, click Q&A in the webinar controls.

2. Find the question you want to answer.

   - **Anonymous Attendee** 11:26 AM
     How can I schedule a meeting?

   - **Lisa Robins** 11:29 AM
     Where can I download Zoom?

3. Click Answer Live to answer the question out loud during the webinar.

4. Click Type Answer to type out your answer for the attendee.
Dismissing and reopening questions

1. As the host, co-host, or panelist, click Q&A in the webinar controls.

2. Hover over the question that you would like to dismiss and click the button at the top right, then click **Dismiss**.

3. To reopen a dismissed question, click the **Dismissed** tab in the Q&A section of webinar controls.

4. Find the question you would like to reopen and click **Reopen**.

Upvoted Q&A

Q&A that has been upvoted will automatically be sorted by number of upvotes. You can upvote a question by clicking the thumbs up icon.
Chat

After starting the webinar and before participants enter, it is recommended that the host set chat for participants to be with panelists only.

1. Click the **Chat** button in webinar controls.

2. Click the button in the top right of the message window, and click **All panelists**.
Additional Options

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Polling

Polling allows you to create various question types for your virtual health visit. During the virtual health visit, you will be able to start the poll and gather the responses from your participants. Polls can be conducted anonymously if you do not wish to collect participant information. You can also download a report of the polling answers after the virtual health visit.

Polls can be set up after scheduling a virtual health visit or during an in-progress, scheduled virtual health visit by the host or alternative host. Polls cannot be created during in-progress, instant meetings.

Note: Please refer to PHSA’s guidelines around surveys & privacy prior to initiating any polls or surveys that may request personal information.

Requirements

- Use the web browser version of Zoom to create polls in advance.
- Enable polling to be included in virtual health visits.
  - Click on the Settings tab.
  - Scroll to Meeting Polls and toggle to ‘on.’
- When scheduling the virtual health visit, under Options (web) or Advanced Options (desktop client), check the box to Allow alternative hosts to add or edit polls.

Creating a poll in advance of the virtual health visit

1. Follow steps 1-5 to schedule the virtual health visit.
2. Scroll down to the Poll section.
3. Click Create and choose from Poll or Advanced Polls and Quizzing:
- **Poll**: Single or multiple choice questions that participants can answer anonymously.
- **Advanced Polls and Quizzing**: Additional question types including rank order, short and long answer, fill in the blank, and rating scale. Questions can also have set correct answers and be delivered as a quiz.

4. Create your polling questions and answers.

5. Click **Save** to save your poll questions and answers.

6. Once you start your virtual health visit, you may start using the poll.
Creating a poll during the virtual health visit

To launch an ad-hoc poll in a scheduled virtual health visit, the original meeting host must:

1. **Start** the virtual health visit.
2. **Admit participants** from the waiting room.
3. From the toolbar, click **Polls**.
4. Click **Add a Question**. You’ll be directed to the web browser to create the poll.
5. Create your polling questions and answers.

7. Click **Save** to save your poll questions and answers.
8. Return to the virtual health visit and start the poll.
Starting and ending a poll

1. Start the virtual health visit.
2. Admit participants from the waiting room.
3. From the toolbar, click Polls.
4. If you have more than one poll question, select the poll you want to start.
5. Click Launch Polling.
6. As participants complete the poll, the results will update.
7. Click End Polling when you have received enough responses.
8. If required, click Share Results to allow all participants to see the results of the poll. Otherwise, only the host can see the results.
9. Click Stop Share Results when you are finished sharing the results.
Downloading the results of a virtual health visit poll

1. Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/
2. Click Reports.
3. Click Meeting under Usage Reports.
5. Change the date filters to the required range.
6. Click Search.
7. Click Generate next to the virtual health visit you are obtaining the poll results for.
8. The report will enter the Report Queue.
9. When the download is ready, click Download. A .csv file will download.
Post-meeting survey

Purpose
As the host, you can schedule a survey with various question types to be sent to participants when your virtual health visit ends. Afterwards, you can download the responses as a report to simplify feedback collection.

Note: Please refer to PHSA’s guidelines around surveys & privacy prior to initiating any polls or surveys that may request personal information.

Requirements
- Use the web browser version of Zoom to schedule and create surveys in advance.

Creating a poll in advance of the virtual health visit
1. Follow steps 1-5 to schedule the virtual health visit.
2. Scroll down to the bottom of the page and click Survey.
3. Click + Create new survey.
4. Create your survey questions and answers. Question types can include single choice, multiple choice, rating scale, or long answer.
5. Click Save.
6. The survey will automatically appear in your participants’ browser window when the visit ends.
**Downloading a report on your survey**

1. Sign into your Zoom for Virtual Health Visits account on the web browser - [https://zoom.us/](https://zoom.us/)
2. Click **Reports**.
3. Click **Meeting** under Usage Reports.
4. Change the Report Type to **Survey Report**.
5. Change the date filters to the required range.
6. Click **Search**.
7. Click **Generate** next to the virtual health visit you are obtaining the survey results for.
8. The report will enter the **Report Queue**.
9. When the download is ready, click **Download**. A .csv file will download.
Breakout rooms

Purpose

- Allows you to split a group virtual health visit into up to 50 separate sessions. The host and co-hosts can choose to split the participants into separate sessions automatically, manually assign participants to breakout rooms, or allow participants to choose their breakout room.

Requirements

- Use the Zoom desktop application to host the group virtual health visit.
- If letting participants choose their breakout room, both the meeting host and participants need to be on desktop client version 5.3.0 or later.
- Breakout room function is enabled:
  - Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/
  - Click Settings.
  - Scroll to Breakout room.
  - Toggle Breakout room to ‘on’.

Open the breakout rooms

After starting the virtual health visit and admitting participants from the waiting room:

1. From the toolbar, click Breakout Rooms.
2. Enter the number of breakout rooms you want to create.
3. Choose to assign participants automatically, manually, or let participants choose* their breakout room.
4. Click Create.
5. After creating the breakout rooms, click **Options** to view additional breakout room options.

6. If you chose to **automatically assign participants**, participants will be assigned to waiting rooms automatically.
   - If you would like to change participants, hover over the participant’s name and click **Move to** or **Exchange**.

   ![Breakout Room Options](image)

If you chose to **manually assign participants**, click **Assign** next to the breakout room and tick the box next to the participants you want in the room.

![Assign Participants](image)

If you chose to **let participants choose room**, a pop up will appear on each participant’s screen and allow them to choose their breakout room.

7. If the breakout rooms are ready, click **Open All Rooms**.

   ![Breakout Rooms Ready](image)

As the virtual health visit host, you will stay in the main meeting. You can click **Join** to join any of the breakout rooms.

If a participant has not joined their breakout room, it will be noted by **(not joined)** next to their name.

Optional: Send a message to all participants while they are in their breakout room.
Close the breakout rooms

1. Click Close All Rooms.
2. A countdown timer will appear and participants will receive a notification that their breakout room is closing.

   All Breakout Rooms will close in 53 seconds

3. All participants will be returned to the main virtual health visit after the breakout rooms close.
Screen Sharing

Purpose
With Zoom, share your screen, desktop or other content during a virtual health visit to your participants even while your video is on.

Requirements
Initially, only the host can screen share by default. However, participants can be granted screen sharing rights during the virtual health visit.

Sharing your screen or content

1. Start a virtual health visit.
2. Click Share Screen on your meeting control toolbar.
3. A dialog box will appear with 3 tabs along the top (Basic, Advanced, Files*). Select one of these screen share options:
   - Basic: Share your desktop, specific program application windows (e.g. Word or PowerPoint), or whiteboard.
   - Advanced: Use a slideshow presentation as your virtual background, share just a part of your screen, or just your computer audio, video, or content from a 2nd camera.
   - Files*: this feature is not enabled for Zoom for Healthcare.
4. Enable these optional features in the bottom left corner of the screen share dialog box:
   - Share sound: Any sound played by your computer (e.g. videos, music, notifications) will be shared in the meeting.
   - Optimize for video clip: Use when sharing a video clip in full screen mode.
   - Share to breakout rooms: Allows the host or co-host to share their screen from the main session directly into all open breakout rooms.
5. Click Share.
Allow other participants to screen share

If you want to grant only one other participant the ability to screen share, you can make them a co-host during the virtual health visit:

1. Click on Participants on your meeting control toolbar.
2. Hover over the participants’ name and click More.
3. Click Make co-host.

If you want all participants to have the ability to screen share, you can change sharing rights during the virtual health visit:

A. Click on Security on your meeting control toolbar and check Share Screen;

OR

B. Click on the arrow beside Share Screen on your meeting toolbar and click Advanced Sharing Options to access additional settings.
Allow other participants to control slides

Note: This feature must be turned on in your zoom.us web settings and if enabled, requires all participants in your meeting have version 5.8.3 or later. If a participant does not have the required version, they may not be able to enter the meeting until their Zoom desktop client software has been updated.

When screen sharing a presentation, you can also allow other participants to control the progression of slides for the presenter. This avoids the need to ask the presenter to change the slide, interrupting the flow of the presentation. Slide control can be given to multiple participants in a virtual health visit, or multiple panelists in a webinar.

1. Start your virtual health visit.
2. Begin screen sharing presentation in presentation mode.
3. On the sharing toolbar, click Slide Control.
4. Select one or more participants you wish to give slide control. The slide control button will update with the number of participants with slide control next to the icon.

5. The participant(s) will now be able to control your slides. They will retain slide control as long as you continue sharing.

Using slide control

When you’ve been given access to slide control and the presenter enters presentation mode, a notification will appear, informing you of the new access. The slide controls will appear in the bottom-left corner of the presentation view.

1. Click the left and right arrow buttons to move the presentation forwards or backwards.
2. Alternatively, you can use the left and right buttons on your keyboard.
Setting up a virtual background for the desktop application

**Purpose**
- A virtual background can protect your privacy and provide a more appropriate setting for your virtual health visits.

**Requirements**
- Virtual background needs to be enabled for your account.

1. Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/.
   - This can’t be done through the desktop application.
2. Click Settings and scroll to the In Meeting (Advanced) section.
3. Scroll to Virtual background and toggle to ‘on’.

Choosing a virtual background for virtual health visits

1. Sign in to the Zoom desktop application
6. In the top right corner, click Settings (the gear icon).
7. Click Background & Filters.
8. Select one of the available backgrounds or add your own image or video background by clicking ‘+’.

9. The selected image will be your virtual background during meetings launched on this device.
10. Optional: if you have a green background, select I have a green screen for better quality.
11. To remove the virtual background, follow steps 1-3 above and select None as the virtual background.

Changing the virtual background during a virtual health visit

1. Next to the Start/Stop Video button in the toolbar, click ↵ and Choose Virtual Background, or Blur My Background for a quick option.
2. Choose ‘None’ to remove the background or select an image to change the virtual background.

**For the best virtual background performance**

- Ensure that your real background is a solid color and uniformly light, or use a green screen.
- Make sure that your clothing is not the same colour as your real background.
Using Immersive View

**Purpose**
- Immersive View allows hosts to arrange video participants and webinar panelists into a single virtual background, bringing people together into one scene to connect and collaborate in a cohesive virtual meeting space.

**Requirements**
- **Immersive View** needs to be enabled for your account.
  1. Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/.
     - This can’t be done through the desktop application.
  2. Click **Settings** and scroll to the **In Meeting (Advanced)** section.
  3. Scroll to **Immersive View** and toggle to ‘on’.

---

**Starting Immersive View for virtual health visits**

1. Start a virtual health visit or webinar as the host.
2. In the top-right corner, click **View**.
3. Click **Immersive View**.

4. Select one of the following options for placing participants into the scene:
   a. **Automatically**: This will include as many participants as is possible in the scene you select.
   b. **Manually**: You will add or remove participants as you wish.
5. Select the scene you would like to use. Each scene designates the max number of predefined places for attendees in the bottom right corner.

6. Click **Start** to begin the Immersive View.

**Use a custom Immersive View**

1. In the top-right corner, click **View**.
2. Click **Change Immersive View**.
3. Click + to add a custom immersive background.
4. In the file selection dialog box that opens up, find and select the image you want to use from your computer.
5. Click **Open**.
6. Click **Start** to launch the new scene.
7. Click and drag participant videos down onto the scene, adjusting their size as needed.
Moving and adjusting participants

When the immersive view begins, as many participants’/panelists’ videos as that scene allows by default (or fewer) will be placed in the predefined locations.

Extra participants will be placed **above** the immersive scene when:

- predefined locations are filled,
- not every participant is selected for the scene, or
- late attendees.

The host can either leave these videos above the scene, click and drag the video down to an empty location, or click and drag the video to replace someone else. Videos dropped near a predefined location will snap to that location and resize each video.

**To resize a participants’ video:**

1. Click on the video participant to see a thin, blue box outlining their video panel.
2. Click and drag the participant to a location in the scene.
3. Click and drag one of the corners of the box to resize their video.
Using Focus Mode

**Purpose**
- Focus Mode is designed to reduce distractions for participants, particularly in a digital learning environment. In a group virtual health visit, it can also enhance participants' privacy.
- This feature gives the host and co-hosts view of all participants' videos without other participants seeing each other. Participants in focus mode can still see their own video, but can only see other participants' names, their nonverbal feedback or reactions, and hear their audio when unmuted.

**Requirements**
- Start a virtual health visit as the host or co-host.
- To schedule a virtual health visit with Focus Mode already turned on, expand **Options** or **Advanced Options** when scheduling and select the checkbox **Enable focus mode when meeting starts**. This option can still be turned off at any time once the visit has started.

**Using Focus Mode in a virtual health visit**

1. Start a virtual health visit or webinar as the host.
2. Click **More** on the meeting toolbar.
3. Click **Start Focus Mode**.
4. On the dialog box that appears, click **Start** to confirm, or select the **Don't ask me again** checkbox to skip this confirmation going forward.
5. When Focus mode begins, you and the participants are notified with a banner along the top of the video window. The focus mode icon is also always visible in the top-left corner of the video while focus mode is active.
Note: Participants’ shared screens are initially only visible to the host and co-hosts in Focus mode. Change the settings below to allow all other participants to view as well:

1. Click the up arrow on the **Share Screen** button on the toolbar.
2. In the **Shared screens can be seen by** section, click **All participants**.

6. To end Focus mode:
   a. Click **More** on the meeting toolbar.
   b. Click **Stop Focus Mode**.
Focus Mode Examples

Host (Parmeet's) or co/host's view in a meeting with the host and interpreter spotlighted:

Participant (John's) view in a meeting, when host and interpreter are spotlighted:
Recording

**Purpose**
Zoom for Healthcare has a feature that allows approved users to create an audio and video recording of a webinar or meeting. Recordings will be automatically saved to the cloud and saved for 1 year, during which time they may be shared with others and/or downloaded to the host’s local device.

**Requirements**
- The purpose for recording **must** meet one of the permitted scenarios outlined in this decision support tool.
- Once reviewing the above, Zoom cloud recording functionality can be requested for your Zoom for Healthcare account.

**How to start a cloud recording**
1. Start your instant or scheduled virtual health visit as the host.
2. Click the **Record** button on the toolbar to begin recording.
3. A notification pop-up will appear on participants’ Zoom windows to inform them about the potential risks and considerations associated with any cloud-based recording.
4. To stop recording, click **Pause**, **Stop Recording**, or **End Meeting**.
5. Once the recording has been fully stopped, a dialog box will appear asking you for confirmation:

6. Once the meeting has ended, the recording will be processed. Zoom will send an email to you when the process is completed. The email will contain a link for you (the host) to view, share and manage the recording from zoom.us.

Managing your cloud recordings

1. Sign in to zoom.us

2. In the navigation menu on the left-hand side, click Recordings. Under Cloud Recordings, you will see a list of recordings that you’ve created.

3. To filter, adjust the date range and status, then search by host, meeting ID, topic, or keyword.

Note that cloud recordings are only available on zoom.us for 1 year, after which they are automatically deleted.
4. In the list, find the cloud recording you want to view, share, download, or delete.
   a. Click **Share** to copy a recording **link** and associated **passcode**, or access additional share settings.

   ![Zoom Cloud Recordings]

   The shared link will open up in a browser window. The recipient will be prompted to enter the passcode and will then be able to view the recording, but only the host will be able to download.

   ![Zoom Share Recording]

   b. Click **...** to **download** or **delete** all recording playback file formats.

5. To access individual recording playback formats (e.g. shared screen only vs. speaker view), click on the bold **Topic** recording name to view more details.
6. Choose the recording file layout(s) you want to download:
   a. **Shared screen with speaker view**: Shows only the video of the active speaker and any shared screen.
   
   b. **Shared screen with gallery view**: Shows the video of participants in gallery view and any shared screen.
   
   c. **Speaker view**: Shows only the video of the active speaker.
   
   d. **Gallery view**: Shows the videos of participants in gallery view.
   
   e. **Shared screen**: Shows only the shared screen and no video.
   
   f. **Audio only**: Plays the audio of the video only. Download will be an M4A file of the audio.

7. Downloaded recordings will appear by default in your computer’s local Downloads folder, where they can then be moved to a secure and encrypted location.

Files appear according to the following naming convention TZYYYYMMDD-HHMNSS_Meeting-Name_KEY_resolution.mp4.

   a. **KEY values may be**:
      
      i. **gvo** – gallery view only
      ii. **gallery** – shared screen with active speaker
      iii. **avo** – active speaker only
      iv. **as** – shared content only

Most departments have a shared folder on the network for their internal use – these locations are ideal as:

- They are secured by our network’s firewalls
- They are encrypted
- Access to them can be restricted at a user level.

Consult with your local department’s processes and policies for more information.
Accessibility

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Interpreters for virtual health visits

Purpose
Some patients and clients may require an interpreter for their Zoom virtual health visit. After scheduling the virtual health visit, the provider or scheduler can request interpreter services from the Provincial Language Service (PLS).

Spoken language interpreters and sign language interpreters can be requested.

Requirements
- A PLS account* is required to request interpreter services.
  - If you need a PLS account, contact the PLS at 604-297-8400 or toll-free 1-877-BC TALKS (1-877-228-2557)
- Providers and support staff should request an interpreter as early as possible. However, interpreting services can be requested up to 15 minutes before the start of the virtual health visit.
  - In order to avoid late cancellation fees, please update and/or cancel requests at least 24 hours in advance when possible.

*Vancouver Coastal Health, Providence Health and Provincial Health Service Authority have access to the service under the lower mainland interpreting service consolidated service agreement.

Other Health Authorities, Doctors of BC and Community Living BC should connect directly with PLS at 604-297-8400 or toll-free 1-877-BC TALKS (1-877-228-2557) to access the service.

HealthLink BC should connect with their managers to connect to a phone interpreter.

Spoken and sign language interpreter
To request a spoken and sign language interpreter after scheduling the virtual health visit:

1. Scroll down to Invite Link.
2. Right-click the virtual health visit URL.
3. Click Copy link address.

```
Material has been prepared solely for use at Provincial Health Services Authority (PHSA). A printed copy of this document may not reflect the current electronic version.
```
4. Access the PLS Online Booking System.

5. Login using your PLS account.

6. Create a new request for a one-to-one visit.
   - Choose Virtual Visit as the Appointment Type.
   - Complete the Request Date and Language.
   - Paste the Zoom virtual health visit meeting URL into the Meeting Link field.

7. Create a new request for a group visit.
   - Follow same steps as above
   - Choose “Multiple Patients” & “Multiple Healthcare Professionals”
   - Select “Education/Group Session” under the Purpose

8. Submit the request. PLS will only contact you if an interpreter cannot be found.

9. At the start of the virtual health visit, admit the interpreter from the waiting room and confirm their identity.
Language Interpretation for group sessions

**Purpose**
Zoom for Healthcare has a feature that allows a live interpreter to do simultaneous interpreting (as opposed to consecutive interpreting) to the Limited English Proficiency (LEP) patient while the health care provider does the presentation, and other participants speak English. Only the LEP patient can hear the interpreter.

**Note:** This two-page reference guide can be shared with LEP patients as needed.

**Requirements**
- This feature is meant for a group virtual health visit.
- Host or organizer needs to send a request for an interpreter via the PLS web portal.
- Use the web browser https://zoom.us/ to schedule language interpretation.
- Language Interpretation needs to be enabled for your account.
  1. Sign into your Zoom for Virtual Health Visits account at https://zoom.us/.
  2. Click **Settings** and scroll to the **In Meeting (Advanced)** section.
  3. Scroll to **Language Interpretation** and toggle to ‘on’.
  4. Click on “+” to add any language you might need.

**Schedule the virtual health visit with language interpretation**
1. Sign in to zoom.us and follow steps 1 – 5 to schedule the virtual health visit.
2. Scroll down to **Interpretation**.
3. Check the box to **Enable language interpretation** and click the **X** to remove the interpreter’s email field.
4. Click **Save**. Your virtual health visit is now ready to send to your participants.
5. Now you can send a request via the PLS web portal to confirm the interpreter for your virtual health visit.
During the group virtual health visit with the interpreter

1. Start your group virtual health visit as the host.
2. The interpreter will join the visit as a participant.
3. Click on **Interpretation** on the meeting toolbar.

4. A dialog box will appear for you to assign the interpreter’s language:
   a. Click **Add Interpreter** then enter the Interpreter’s name.
   b. Choose the appropriate language from the drop down menu.
   c. Click **Start**.

5. All participants will see a notification that language interpretation is available.

6. Click on **Interpretation** and click on **English** to turn on the feature.

7. Ask the LEP participants to also click on **Interpretation** and click on their desired language.

8. The LEP participants’ toolbar will now have the desired language button. Ask the LEP participant to click on it once more to **Mute Original Audio**.

9. Continue your virtual health visit.

If original audio is not muted, the participant will hear both English speaking audio & interpreter’s audio at the same time.
Captioning

Purpose
Zoom for Healthcare has a Live Transcript (auto-generated) or Closed Caption (provided by a professional captioner) feature that offers immediate, verbatim streaming of voice-to-text translation while using Zoom for Healthcare. These features can improve access to care for patients or staff that would benefit from reading and seeing what is said during the virtual health visit. Transcripts from the visit will not be saved.

Note:
Live Transcript is ad-hoc language resources and should be used as a secondary medium of communication. Closed Caption is used for medical appointments with a patient who is not proficient or knows American Sign Language.

Please read these guidelines before proceeding with Zoom captioning features.

Requirements
- For Closed Caption, the host or organizer needs to call PLS (604.297.8400 or Toll-free: 1.877.BC TALKS (228-2557) to request a CART service.
- Closed captioning needs to be enabled for your account.
  1. Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/
  2. Click Settings and scroll to the In Meeting (Advanced) section.
  3. Scroll to Closed captioning and toggle to ‘on’. Check the sub-boxes as below:

  ```
  Closed captioning
  Allow host to type closed captions or assign a participant/3rd-party service to add
closed captions
  - [x] Allow use of caption API Token to integrate with 3rd-party Closed Captioning
    services
  - [x] Allow live transcription service to transcribe meeting automatically
  - [x] Allow viewing of full transcript in the in-meeting side panel
  ```
Live Transcription

1. Start your virtual health visit as the host.
2. Click Live Transcript on your meeting toolbar.
3. Click Enable Auto-Transcription.
4. A notification will appear in the Zoom meeting window for all participants. All participants will now be able to:
   a. View or hide Full Transcript in the in-meeting side panel
   b. View or hide subtitles
   c. Access additional subtitle settings in the desktop client.
5. Continue your virtual health visit. The transcript will not be saved after the visit is ended.
Live captioning (CART) with a professional captioner

1. Before scheduling your virtual health visit, call PLS to request a professional captioner, when Deaf or Hard of Hearing patient does not know ASL, for your virtual health visit. Once confirmed, schedule your virtual health visit.

2. Start your scheduled virtual health visit as the host.

3. The professional captioner will join the virtual health visit as a participant.

4. Click Live Transcript on your meeting toolbar.

5. Click Copy the API Token.

6. Paste the API Token in the chat box. Give the professional captioner a few minutes to have their system set up.

7. Once transcription starts, a notification will appear in the Zoom meeting window for all participants. All participants will now be able to:
   a. View or hide Full Transcript in the in-meeting side panel
   b. View or hide subtitles
   c. Access additional subtitle settings in the desktop clients

8. Continue your virtual health visit. The transcript will not be saved after the visit is ended.
Annotation

Purpose
Zoom for Healthcare has a feature that allows participants to add hand drawn annotations to a shared screen during a Zoom virtual health visit. When the host shares their screen, both the host and participants can use the annotation tool to share information. Annotations are not saved after the visit is ended.

Annotation during a virtual health visit

1. The host will start the virtual health visit.

2. Click on Share Screen on the meeting toolbar to share your screen.

3. A share screen toolbar will appear.
   a. Host: Click the Annotate tool.
   b. Participant: Click on View Options, then Annotate.

4. The Annotation toolbar will appear. Select any of the tools (e.g. text, draw, stamp, spotlight, etc.) to annotate on the shared screen as desired. Note that the annotation is not saved after the visit is ended.
Privacy & Security

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### Best practices security for Zoom virtual health visits

#### Zoom for Healthcare security best practices

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<th>Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Use the automatically generated meeting ID. Do not use the Personal Meeting ID. When you schedule a Zoom meeting, look for the Meeting ID Options. Select Generate Automatically. This prevents most Zoom-bombers.</td>
</tr>
<tr>
<td>2</td>
<td>Use individual meetings for patients. Don’t use a day-long meeting for multiple patients (All-Day-Clinic-Style). There’s potential for the wrong people to be in the waiting room.</td>
</tr>
<tr>
<td>3</td>
<td>Use the meeting waiting room for screening. You can choose who and when to let people into the session. This is not necessary for Virtual Health Visits scheduled as webinars.</td>
</tr>
<tr>
<td>4</td>
<td>Confirm patient identity. Make sure you have the correct patient before disclosing any information.</td>
</tr>
<tr>
<td>5</td>
<td>Remove someone or put them on hold. During the call, go to the participants pane on the right. Hover over the name of the person you want to remove and when options appear, choose Remove.</td>
</tr>
<tr>
<td>6</td>
<td>Lock a session once it starts. While the session is running, click Manage Participants. At the bottom of the Participant Panel select More then Lock.</td>
</tr>
<tr>
<td>7</td>
<td>Do not click on links you do not trust. Similar to email, do not click on links that are not credible.</td>
</tr>
<tr>
<td>8</td>
<td>Use the most up-to-date version of Zoom. If you are using a personal device, check for updates.</td>
</tr>
<tr>
<td>9</td>
<td>Only allow the Host to screen share. Zoom web browser &gt; Settings &gt; Who can share &gt; Select Host Only. Before screen sharing, close private applications and documents.</td>
</tr>
</tbody>
</table>

#### Default settings used in Zoom for Healthcare:

- **Passwords are turned on**: This provides another layer of security, to discourage Zoom-bombers.
- **Waiting rooms are turned on**: This allows you to screen who is let into the meeting. The host lets them in.
- **Recordings are disabled**: Zoom recordings have been disabled to protect patient.
Zoom and PIPEDA/PHIPA compliance

Source document

At Zoom, we are committed to protecting the security and privacy of our customers’ data. This includes enabling our customers in Canada to be compliant with Canadian Data Protection regulations, including the Personal Information Protection and Electronic Documents Act (PIPEDA) and, locally, the Personal Health Information Protection Act (PHIPA).

How does Zoom protect its customers data?

Zoom’s commitment to protecting the security and privacy of our customers’ data includes:

- Submitting our privacy practices to independent assessment and certification with TrustArc
- Undergoing an annual SSAE-16 SOC 2 audit by a qualified independent third-party
- Performing regular vulnerability scans and penetration tests to evaluate our security posture and identify new threats

What is PIPEDA and PHIPA?

PIPEDA is a Canadian federal privacy law, enacted in April of 2000, for private sector business. It sets rules for how businesses must handle personal data in the course of commercial activity.

Enacted in November 2004, PHIPA is a local, provincial (Ontario) legislation that protects the confidentiality and privacy of personal health information (PHI) by establishing rules for the collection, use, and disclosure of PHI during the provision of healthcare.

What is “personal information” and “personal health information”? 

Under PIPEDA, personal information is defined as any factual or subjective information, recorded or not, about an identifiable individual. This includes information, such as:

- Age, name, ID numbers, income, ethnic origin, or blood type
- Opinions, evaluations, comments, social status, or disciplinary actions
- Employee files, credit records, loan records, medical records, existence of a dispute between a consumer and a merchant, or intentions (for example, to acquire goods or services, or change jobs)

Under PHIPA “personal health information” means any information related to:

- The provisioning of healthcare services and treatment
- Payment for the provisioning of healthcare services
- Mental or physical health information

Are there any PIPEDA or PHIPA certification programs?

No. Currently there are no PIPEDA or PHIPA certification programs to assess third-party compliance.

Does PIPEDA or PHIPA impose any data localization requirements?
No. Data does not need to remain in Canada in order to comply with either of these privacy laws. As long as adequate transfer mechanisms are in place, Canadian data can be stored in the United States.

**How does PIPEDA and PHIPA compare to US (HIPAA) and EU (GDPR) privacy regulations?**

PIPEDA is a general data privacy regulation not specifically focused on personal health information, while PHIPA is limited to protecting the privacy and confidentiality of PHI. In that respect, PIPEDA is closer to EU GDPR, and PHIPA aligns to the US HIPAA regulations. However, both Canadian regulations focus on the use, transmission, storage, and security of data in ways that are more similar to the EU GDPR and its requirements for consent, access, transparency, etc. Whereas HIPAA looks to establish Business Associate relationships through BAA contracts that enable third parties to receive PHI in order to perform services, PHIPA requires that third parties ensure adequate protection of the data before they can receive it. And their use of data is limited to the purpose for which it was originally collected. Like GDPR, both Canadian regulations can be complied with by entering Data Protection Agreements which will ensure the adequacy of the data protection mechanisms that support the transfer to data.

**How does Zoom help with PIPEDA and PHIPA compliance?**

Zoom uses privacy practices and technical security measures to ensure that customer data is protected. Our security and privacy measures include:

- The execution of “Data Protection Agreements” to contractually establish adequate transfer mechanisms
- Providing a variety of in-meeting product security features
- Protecting data in transit by TLS 1.2 using 256-bit Advanced Encryption Standard (AES-256)
- Leveraging the physical and environmental protection of our TIER 1 data center providers. Zoom’s hosting facilities have 24x7 manned security and monitoring through multiple layers of physical security controls including perimeters fences, manned lobbies, surveillance cameras (CCTV), man trap, locked cages, motion detectors, and biometric access requirements
- No monitoring, viewing, or tracking of the video or audio content of your video meetings or webinars
- No sharing of customer data with third parties
- Limiting retention of accounts to 30 days after termination to assist with product reactivation (if requested by customer). After 30 days have passed, the account is permanently deleted

**Additional resources**

- [PIPEDA in Brief](#)
- [Personal Health Information Protection Act](#)
- [Security and Privacy Certifications](#)
- **SOC2:**

The SOC 2 report provides third-party assurance that the design of Zoom, and our internal processes and controls, meet the strict audit requirements set forth by the American Institute of Certified Public
Accountants (AICPA) standards for security, availability, confidentiality, and privacy. The SOC 2 report is the de facto assurance standard for cloud service providers.

**TRUSTe:**

TRUSTe has certified the privacy practices and statements for Zoom and also will act as dispute resolution provider for privacy complaints. Zoom is committed to respecting your privacy. If you have an unresolved privacy or data use concern that we have not addressed satisfactorily, please contact our U.S.-based third-party dispute resolution provider (free of charge) at https://feedback-form.truste.com/watchdog/request.

**EU-US Privacy Shield:**

Zoom participates in and has certified its compliance with the EU-U.S. Privacy Shield Framework. Zoom has committed to subjecting all personal data received from European Union (EU) member countries, in reliance on the Privacy Shield Framework, to the Framework’s applicable principles. To learn more about the Privacy Shield Framework, visit the U.S. Department of Commerce’s Privacy Shield List [https://www.privacyshield.gov/list](https://www.privacyshield.gov/list).
Client notification form

Notification for the use of Digital Communications

Digital Communications can be a convenient way to communicate with your care team between visits, but there are risks when using these technologies to send personal information.

We’ll do what we can to confirm that any personal information we send is being received by you and only you, but it’s never possible to have 100% certainty who we are communicating with outside of a face-to-face visit.

You need to be aware that we cannot control what happens to information once it is stored: 1) on your device; 2) by telecommunications providers; 3) by software or application providers; or 4) by other applications that may have access to your messages.

You are responsible for the security of your own computer/tablet, email service and telephone.

Risks of using Digital Communications

The information could be requested, viewed, changed or deleted if others are allowed access to your phone, tablet or email account.

Information may be vulnerable if stored on a computer/device that has been compromised by viruses or malware.

Organizations may have to disclose information where required by law or under court order.

Electronic communications can be intercepted by third parties.

Your data may be stored and/or accessed outside of Canada.

What can you do?

The below are suggested best practices meant to help you protect your information once it is in your control. It is important to note that these are general best practices and will not guarantee your information won’t be accessed by a third party.

- Protect your passwords! Someone could pose as you by sending us a request from your device or email
- Use download Apps from trusted sources (Google Play, iStore). If the info you are wanting to communicate is of a sensitive nature, you may want to seek a more secure method of communication
- Delete emails and texts you no longer require
- Use your device settings to control what information your Apps have permission to access
- Avoid sending personal information while using public Wifi
- Use permission controls on your device to ensure that none of your applications (Apps) have unnecessary access to your text messages and/or emails
- Use virus protection on your computer or device, and regularly scan
Sample validation script

Identity Validation

The purpose of validating a patient’s identity is to avoid misdirected emails or text messages, which is the most common cause of privacy breaches when communicating digitally. ID validation is only required in instances where personal information is being sent digitally and where any doubt exists that the information will be sent to the correct individual.

Options for Validating

- **Option 1:** Provide your contact information to the Client and ask them to send the first message;
- **Option 2:** Send an initial text or email (see below) to confirm you have connected with the right individual; or,
- **Option 3:** Ask the recipient to verify, by text or phone, information that only the intended recipient would know (e.g. month/year of birth, last 4 digits of PHN, reference number, date of last clinic visit, or other previously agreed upon information).

Sample Validation Script

Hello

[Organization or clinic name] has records available for you. Please respond to this message with the last 4 digits of your Personal Health Number (PHN) to confirm that you are the correct individual and that you consent to these records being sent to [insert email address].

Before you respond, it is important that you understand the potential risks associated with the use of digital communications by reviewing our (LINK) Notification for the Use of Digital Communications.
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Before you get a Zoom for Virtual Health Visits account

Why Zoom for Virtual Health Visits?

- Zoom for Virtual Health Visits is the only version of Zoom approved for the delivery of Virtual Health. It is a cloud-based video conferencing software.

What are the differences between a free Zoom account and a Zoom for Virtual Health Visits account?

- Only Zoom for Virtual Health Visits is endorsed for hosting virtual health visits.
- Only Zoom for Virtual Health Visits is compliant with Canadian privacy regulations, including the Personal Information Protection and Electronic Documents Act (PIPEDA).
- PHSA does not endorse the use of Zoom Basic (the free version) or Zoom Pro for hosting virtual health visits. These versions of Zoom do not meet privacy and security requirements for delivering Virtual Health.
  - As long as the virtual health visit host is using their Zoom for Virtual Health Visits account, participants can join from any type of Zoom account or no account at all.

Who can get a Zoom for Virtual Health Visits account?

- All team members, including physicians, clinical staff, and administrative staff involved in the delivery of Virtual Health at the following organizations can request an account:
  - Provincial Health Services Authority (PHSA)
  - Providence Health Care (PHC)
  - Vancouver Island Health Authority (VIHA)
  - HealthLinkBC (HLBC)
  - Doctors of BC (DoBC)
  - Community Living BC (CLBC).

Who will pay for my Zoom for Virtual Health Visits account?

- PHSA is provisioning Zoom for Virtual Health Visits accounts. The accounts are paid for with funds from Canada Health Infoway (CHI) and from the participating health organizations.

Can I use my personal email address for my Zoom for Virtual Health Visits account?

- No, a business email, such as a health authority domain email is required.

Can a shared email (e.g. clinic email) be used to create an account?

- It is recommended that each user engaged in Virtual Health should have their own account. Requests for shared accounts are reviewed on a case-by-case basis.

Do I need an account to schedule in Zoom for Virtual Health Visits on behalf of a provider?
Yes, a Zoom for Virtual Health Visits account is required for scheduling virtual health visits on behalf of a provider on the Zoom for Virtual Health Visits instance.

**Can I use my personal Zoom account for virtual health visits?**

- No, as a health care provider, you can only conduct virtual health visits from a Zoom for Virtual Health Visits account.

**What if I have a personal Zoom account linked to my work email, but I need to upgrade to a Zoom for Virtual health visits account?**

- If you have requested a Zoom for Virtual Health Visits account, you can seamlessly convert your personal account into a Zoom for Virtual Health Visits account. Instructions are included in your ‘activation’ email.

**What if I have a personal Zoom phone linked to my work email, and I want to request a Zoom for Virtual Health Visits account?**

- Unfortunately you can’t use the same email address for your Zoom phone and your Zoom for Virtual Health Visits account.

**Zoom accounts for patients**

**Do patients need a Zoom for Virtual Health Visits account to join the virtual health visit?**

- No, patients do not need a Zoom for Virtual Health Visits account. They can use their personal Zoom account to join a virtual health visit if they wish.

**Are privacy and security compromised if patients are using a personal account?**

- No, security and privacy standards of the virtual health visit are not compromised if the patient joins using a personal account.
- Only the host (provider) needs to be logged into Zoom for Virtual Health Visits to ensure privacy and security standards are upheld.

**Requesting a Zoom for Virtual Health Visits account**

**Do I need an account if Zoom is already installed on my work computer?**

- Yes, you will still need to request an account.

**How do I request an account?**

- You can request an account online at [https://bcvh-zoom.phsa.ca](https://bcvh-zoom.phsa.ca)
- Please note the online form works best in Google Chrome.
Activating your Zoom for Virtual Health Visits account

How do I activate my account?

- After requesting an account, you should receive an automated welcome email from Zoom with a link to activate your account and create a password.
- You will also receive a second email from PHSA with instructions.

What should I do if I haven’t received an activation email?

- If you use more than one email account, verify which email address has been used to request your Zoom for Virtual Health Visits account.
- Check your junk or spam folder.
- If you still can’t find your activation email:
  - Go to https://zoom.us and select ‘sign in’.
  - Click ‘forgot password’ and enter your email address used to request a Zoom for Virtual Health Visits account.
  - Check if you received an email from Zoom to change your password.
  - If you don’t receive an email, please contact OVHZoomSupport@phsa.ca.

What should I do if my account activation email has expired?

- Please contact OVHZoomSupport@phsa.ca.

Using your Zoom for Virtual Health Visits account

Can I use my Zoom for Virtual Health Visits account for business (non-clinical) or personal sessions?

- No. Zoom for Virtual Health Visits accounts are for virtual health visits only. These accounts are not intended for business (non-clinical) or personal use. Accounts for Zoom for Virtual Health Visits are issued only to clinicians and clerks engaging in the delivery of virtual health visits.
- A virtual health visit is defined as: as a technology-enabled remote interaction between providers, provider(s) and patient(s), and patient(s) and families to address the patients' health.

Who should I contact before getting started with virtual health visits?

- Before getting started, we recommend contacting your program operation leader for information on integrating Virtual Health in the program service delivery model.

If I have Zoom already installed on my work computer, can I log into Zoom for Virtual Health Visits with my health authority network credentials?

- No, you still have to request a Zoom for Virtual Health Visits account and create a password.
- The login credentials for Zoom for Virtual Health Visits are different from your health authority network credentials.
How do I know I'm logged into my Zoom for Virtual Health Visits and not a personal account?

- **Web browser (e.g. Google Chrome):** Go to Zoom.us, log into your account, go to ‘Profile’ and check your Personal Meeting ID URL. It will start with https://phsa.zoom.us.
- **Desktop application:** Open the desktop application, click ‘Meetings,’ and check your Personal Meeting ID URL. It will start with https://phsa.zoom.us.
- **Mobile device:** Open the desktop application, tap ‘Meetings,’ and ‘Send Invitation.’ Select to ‘Send Email.’ Review the email invitation that generates. The link to join will start with https://phsa.zoom.us.

What kind of virtual health visits does Zoom for Virtual Health Visits support?

- Virtual health visits can be conducted as scheduled meetings or instant meetings.

What devices can I access Zoom for Virtual Health Visits?

- You can access your Zoom for Virtual Health Visits account from:
  - Web browser
  - Desktop application
  - Smartphone or tablet

Can I use my personal device for virtual health visits?

- Yes, during the COVID-19 emergency, you can use your personal computer or mobile device for virtual health visits.
- Ensure you are signed in on your device with your Zoom for Virtual Health Visits account using the latest desktop application or mobile application.

What can I do to protect the privacy and security of the virtual health visit?

- Follow this guide for security best practices.

Training for staff

Where can I get help with integrating virtual Health in the clinical workflow?

- Contact your program operation leader to get support on integrating virtual Health into the program service delivery model.
- Most clinical programs at PHSA offer program-specific guidance and training on how to integrate Zoom for Virtual Health Visits.

Contact us

- You can email us at OVHZoomSupport@phsa.ca for more information and feedback.
Appendices

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Appendix 1: Links to resources

Office of Virtual Health Zoom for Virtual Health Visits

Resources
For health care teams
For patients
Clinical guidelines for Virtual health visits
Education & training sessions

Zoom Help Centre*
Getting started
Scheduling
Audio, video, sharing
Joining and starting a meeting
Video tutorials

* These are general resources for using Zoom. They may vary from this documentation and in some instances, not apply to the Zoom for Virtual Health Visits instance.
**Appendix 2: Important Zoom account settings**

To manage your Zoom for Virtual Health Visits account settings, sign into account on the web browser - [https://zoom.us/](https://zoom.us/). Once logged in, click on the **Settings** tab and scroll to the setting you wish to manage.

There are many settings on this page, but we recommend reviewing the following:

<table>
<thead>
<tr>
<th>Account Setting</th>
<th>Purpose</th>
<th>Recommended Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Security</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Waiting Room</td>
<td>When participants join a virtual health visit, they are placed in a waiting room and require the host to admit them. There is no way to bypass the waiting room.</td>
<td>This is permanently turned ON</td>
</tr>
<tr>
<td>Require a passcode when scheduling new meetings</td>
<td>Generates a passcode for a virtual health visit. This is permanently turned on as a security measure.</td>
<td>This is permanently turned ON</td>
</tr>
<tr>
<td>Embed passcode in invite link for one-click join</td>
<td>Allows participants to join the virtual health visit without entering a passcode. After clicking the link to join, the participant will be brought to the waiting room or told to wait for the host to start the virtual health visit.</td>
<td></td>
</tr>
<tr>
<td>Only authenticated users can join meetings</td>
<td>Allows participants to join the virtual health visit without a Zoom account (free or paid).</td>
<td></td>
</tr>
<tr>
<td><strong>Schedule Meeting</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Allow participants to join before host</td>
<td>This is permanently turned off as an added security measure. When a participant clicks to join a virtual health visit, they will enter the waiting room OR be told to wait for the host to start the visit.</td>
<td>This is permanently turned OFF</td>
</tr>
<tr>
<td><strong>In Meeting (Basic)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chat</td>
<td>Allow virtual health visit participants to send a message visible to all participants</td>
<td></td>
</tr>
<tr>
<td>Sound notification when someone joins or leaves</td>
<td>Ensures that the host and co-host are alerted when someone joins or leaves the virtual health visit. The alert is an audio chime sound.</td>
<td></td>
</tr>
<tr>
<td>Co-host</td>
<td>Allow the host to add co-hosts for the virtual health visit. Co-hosts have the same in-meeting controls as the host.</td>
<td></td>
</tr>
<tr>
<td>Meeting Polls</td>
<td>Adds a button for ‘Polls’ to the virtual health visit meeting controls. This allows the host to survey the attendees.</td>
<td></td>
</tr>
<tr>
<td>Screen sharing</td>
<td>Allows the host to share their screen or content during virtual health visits. We recommend you only allow the host to share, not all participants. If a participant needs to share during a virtual health visit, you can promote to the role of ‘co-host’.</td>
<td></td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Whiteboard</td>
<td>Allows the host to share a whiteboard during a virtual health visit</td>
<td></td>
</tr>
<tr>
<td>In Meeting (Advanced)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Breakout room</td>
<td>Allows the host to split virtual health visit participants into separate, smaller rooms</td>
<td></td>
</tr>
<tr>
<td>Virtual Background</td>
<td>Allows you to customize your background to keep your environment private during a virtual health visit. This can be used with or without a green screen.</td>
<td></td>
</tr>
</tbody>
</table>
## Appendix 3: Technical support for Zoom virtual health visits

### FOR STAFF

<table>
<thead>
<tr>
<th>Service Desk</th>
<th>Contact Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PHSA service desk:</strong></td>
<td>(604) 675-4299; <a href="mailto:servicedesk@phsa.ca">servicedesk@phsa.ca</a></td>
</tr>
<tr>
<td><strong>PHC/VCH service desk:</strong></td>
<td>(604) 875-4334; <a href="mailto:servicedesk@vch.ca">servicedesk@vch.ca</a></td>
</tr>
<tr>
<td><strong>Island Health service desk:</strong></td>
<td>(250) 370-8777; <a href="mailto:servicedesk@viha.ca">servicedesk@viha.ca</a></td>
</tr>
</tbody>
</table>

For account related support or other questions, please email: [OVHZoomsupport@phsa.ca](mailto:OVHZoomsupport@phsa.ca)

### FOR PATIENTS AND CLIENTS

Contact the patient help desk*. Contact information is found in their Zoom virtual health visit invitation.
Monday to Friday, 07:00-17:00
*Interpreting services are available

Information to help patients getting started with virtual health visits with Zoom is on our [patient resource page](#).
Appendix 4: Assistance managing Zoom virtual health visits

Assigning assistance before starting the virtual health visit

Method 1: Scheduling privileges

Anyone with scheduling privileges to your account can be an alternative host (see more below) for all of your virtual health visits. To assign scheduling privileges:

1. Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/
2. Click Settings.
3. Scroll to Schedule Privilege
4. Click the + sign next to Assign scheduling privilege to.
5. Enter one or more email addresses in the window, separated with a comma. Note: The user receiving privileges must have an account provisioned under Zoom for Virtual Health Visits instance. If scheduling privileges cannot be assigned, an error message will appear.
6. Click Assign.

Method 2: Alternative host

When scheduling a virtual health visit, you can designate other Zoom for Virtual Health Visits users as alternative hosts. This option is useful if you don’t want to give someone scheduling privileges to your account.

Alternative hosts can:
- Start the virtual health visit on behalf of the main host
- Admit participants from the waiting room into the virtual health visit

When scheduling, use the ‘Alternative Hosts’ field to enter the email addresses of people you want to be alternative hosts for the virtual health visit.

Assigning assistance after starting the virtual health visit

Method 1: Co-host

You can assign virtual health visit co-hosts after starting the virtual health visit if you did not assign an alternative host or have anyone with scheduling privileges to your account.

You cannot assign a co-host before starting a virtual health visit. Therefore, a co-host cannot start the virtual health visit on your behalf.

Once the co-host(s) is assigned, they can admit participants from the waiting room into the virtual health visit.

Check to ensure you have the co-host function enabled:

1. Sign into your Zoom for Virtual Health Visits account on the web browser - https://zoom.us/
2. Click Settings.
3. Scroll to Co-host and toggle it to ‘on’.

To assign a virtual health visit co-host after starting the virtual health visit:

1. Open the Participants window from the toolbar.
2. Hover over participant’s name and click More.
3. Click Make Co-Host and click Yes to confirm the role assignment.
Appendix 5: Patient virtual health visit journey with Zoom