

The illustration depicts a virtual health visit. A large monitor in the center shows three healthcare professionals: a man with a beard pointing upwards, a woman with glasses waving, and a woman with a concerned expression. A large eye icon is positioned above the monitor. In the foreground, a man with red hair is shown in profile, looking at the screen. The background features stylized light blue shapes representing a virtual environment.

Zoom for Virtual Health Visits Manual

Provincial Virtual 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.

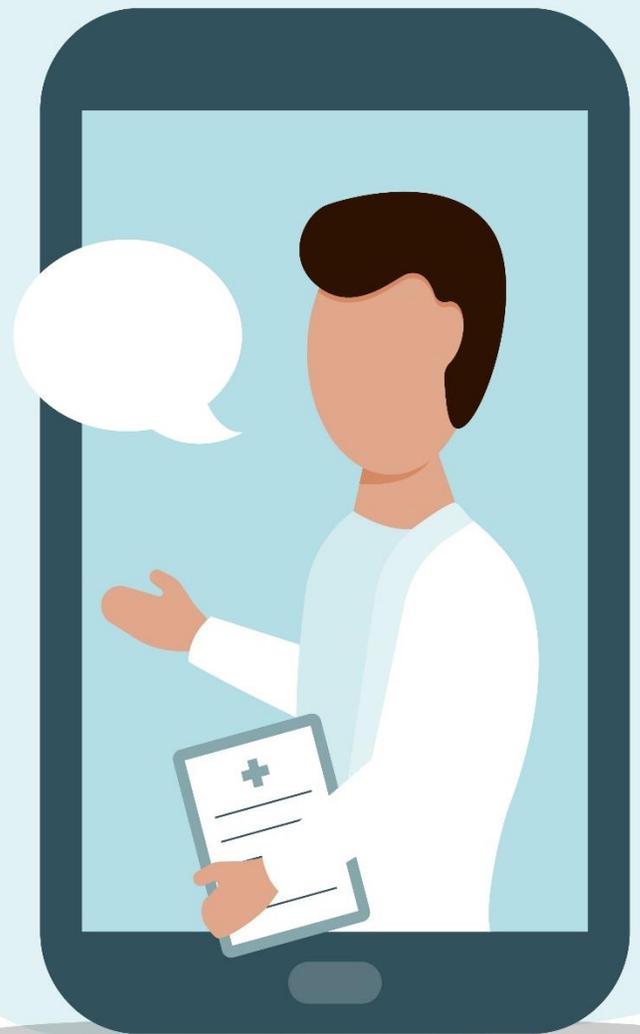




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Getting started with Zoom for Virtual Health Visits

Zoom for Virtual Health Visits: Tips for the Team

<p>1 Introduce virtual health to patients</p> <ul style="list-style-type: none"> Introduce virtual health options to patients including phone/video/online Discuss the Zoom for Virtual Health Visit process at your clinical program Check the technical readiness and digital literacy of your patients 	<p>2 Inform patients about risks and differences</p> <ul style="list-style-type: none"> Inform patients about risk of using Zoom for virtual health visits by giving them the Patient Notification for Digital Communications Terms Validate patient's identity (see additional steps) Note on the patient record that they have received information on the risks of virtual health
<p>3 Communicate patient quick tips as needed</p> <ul style="list-style-type: none"> Refer patients to the Patient Information page (link included in their virtual health visit email) Encourage a Zoom Meeting Test Ensure the patient is aware of the patient help desk number: 1-844-842-3433 (toll-free) Set up patient services, as needed 	<p>4 Start the virtual health visit</p> <ul style="list-style-type: none"> 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 <p>Website manner and etiquette</p> <ul style="list-style-type: none"> 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
<p>5 End the virtual health visit</p> <ul style="list-style-type: none"> Summarize visit outcome for the patient Actively end the virtual health visit for everyone or assign a host before you leave Document the visit in the usual record of care Follow up with any orders 	
<p>Technical Support</p> <p>PHSA (604) 675-4299; servicesdesk@phsa.ca</p> <p>PHCVCH (604) 675-4334; servicesdesk@vch.ca</p> <p>Island Health (250) 376-8777; servicesdesk@ih.ca</p> <p>Account related support / other questions VHVZoomsupport@phsa.ca</p>	

Click to explore this helpful [one-pager](#) that includes steps and links to helpful Zoom resources.

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.

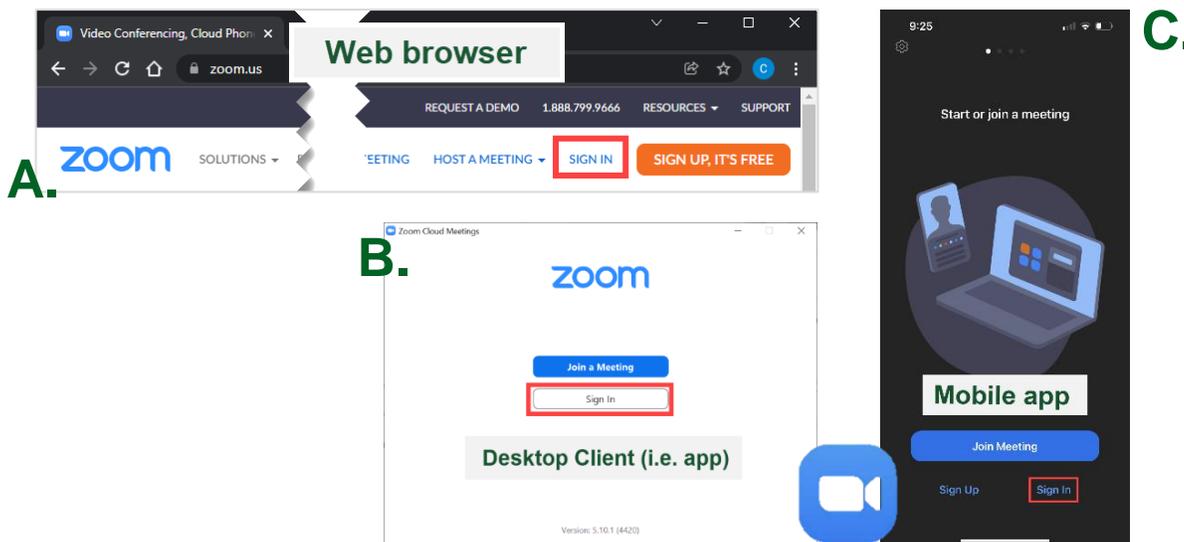
The sign in process will take about a minute or less.

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.

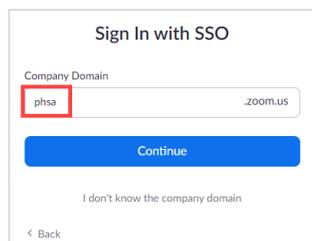


If you are on-site

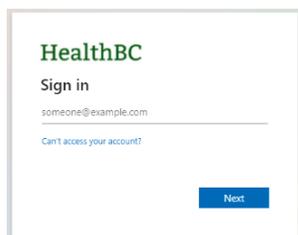
1. If you haven't used SSO to sign in before, first make sure you are signed out of Zoom.
2. Click **Sign In** on your chosen platform (i.e. web browser, desktop app, or mobile app).
3. Click **SSO** or **Sign In with SSO**.



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

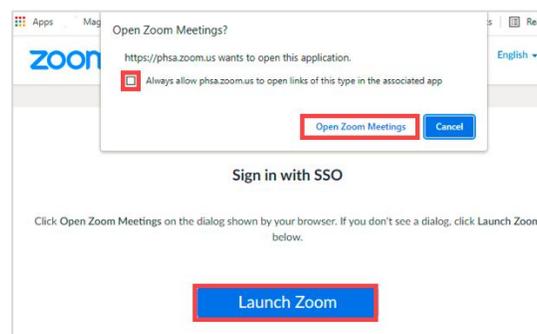


5. If prompted, type in your organizational email (e.g. @phsa.ca, @bccancer.bc.ca) OR select your profile and click **Next**.



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'](#).

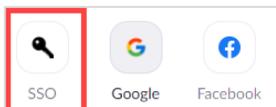
7. You will now be signed in to Zoom.

Providing support for Zoom for Healthcare to:

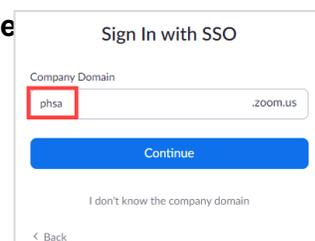


If you are off-site

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**

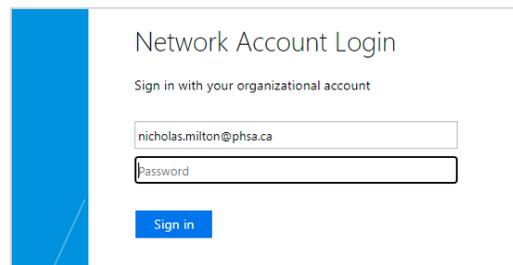


Note: You may not see the following prompts in [steps 5-8](#) if you have already followed these steps to sign in to the PHSA network, or have checked 'Remember Me' when first signing in to Zoom.

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.





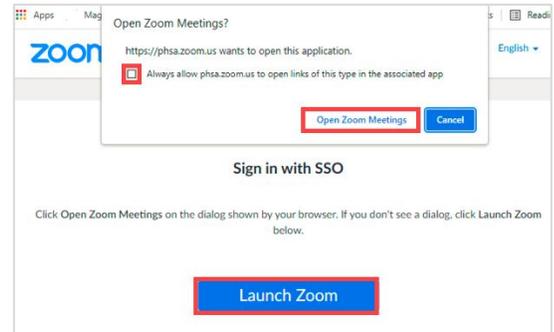
9. Depending on your chosen platform:

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.
2. In the navigation menu, click **Profile**.

When you join meetings and webinars hosted on Zoom, your profile information, including your name and profile picture, may be visible to other participants. Your name and email address will also be visible to the **account owner** and host when you join meetings or webinars on their account while you're signed in. The account owner and others in the meeting can share this information with apps and others.

Alex Chan Edit

Alex C.

Pronouns: they/them
 Always share in meetings and webinars

Department: Office of Virtual Health

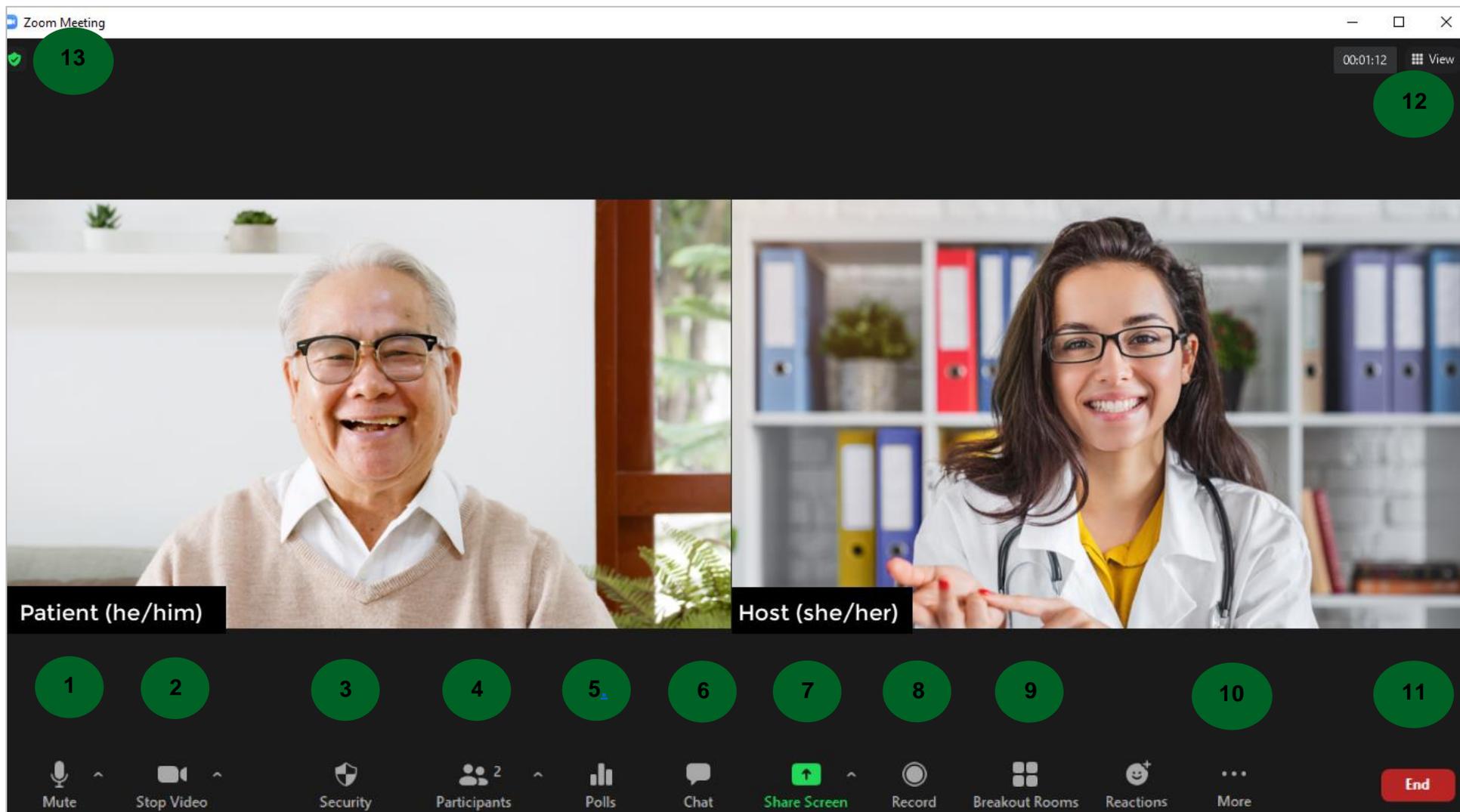
Job Title: Clinician

Company: PHSA

Location: Vancouver

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

6. Chat

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

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.

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

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.

11. End

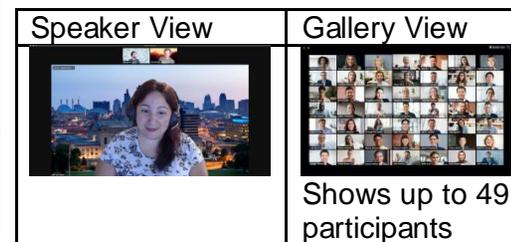
- If the virtual health visit is finished, click **End the Meeting for All**.
- Alternatively, if you are the only person leaving the meeting, click **Leave the Meeting** and assign a new host before you leave

3. Security

- Lock virtual health visit
- Control participant abilities
- Remove participants
- Report participants

12. Change video layout

- Select your preferred video layout:



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

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

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

5. Polls

- Start (launch) polls or create an ad-hoc poll
- See [Polling](#) for more details

9. Breakout rooms

- Open and manage breakout rooms within the virtual health visit.
- See [Breakout Rooms](#) for more details.



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.

	Meetings	Webinars
<i>Key feature:</i>	Waiting room included; participants need to be let in by the host(s).	No waiting room; participants are automatically let into the webinar once it's begun.
<i>Description:</i>	Meetings are designed to be collaborative , with all participants being able to turn on their audio and video, screen share, chat, and see who else is attending.	Webinars are designed so that only the host and any panelists can share their video, audio, and screen. Other participants are view-only and can interact with the panelists via Q&A, chat, and poll questions.
<i>Best used for:</i>	<ul style="list-style-type: none"> Virtual health visits that directly address a patient's health or allow a patient to be seen or heard Small to large group sessions where participants should be able to interact and engage with each other 	<ul style="list-style-type: none"> One or a few people ("panelists") speaking to a view-only audience Events up to 500 participants* Events where no identifiable patient information is shared Audience only needs to interact with the panelists (e.g. Q&A), not with one another

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

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





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Zoom virtual health visits

Scheduling

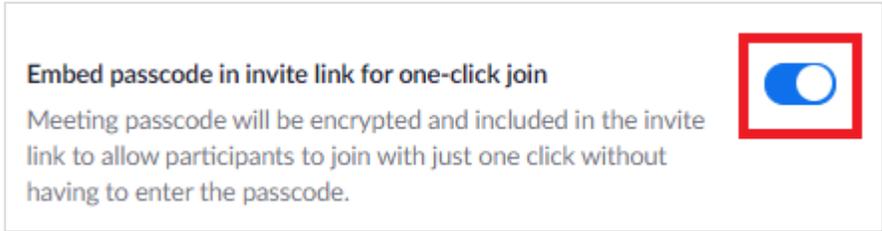
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Web browser scheduling

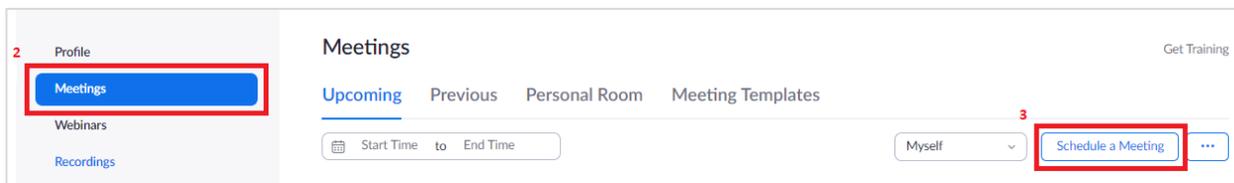
Requirements

- 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/>
2. Click on the **Meetings** tab.
3. Click Schedule a Meeting.



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

Topic	Title of the virtual health visit
Description (optional)	A description of the virtual health visit
When	The intended date and start time of the virtual health visit The Virtual health visit can be started before or after the start time



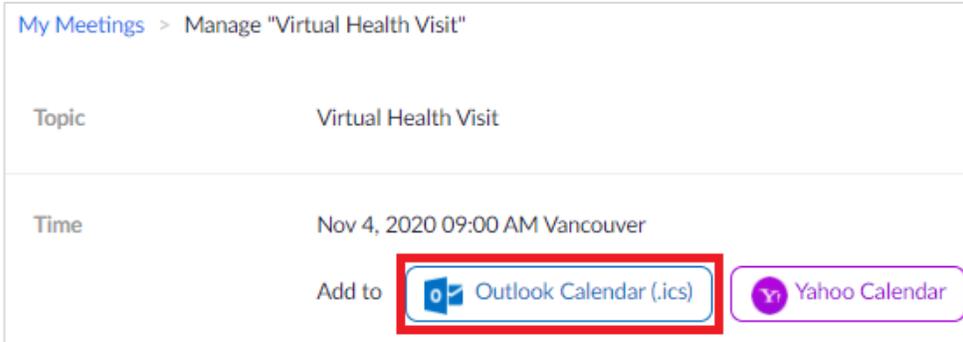
Duration	The intended length of the virtual health visit The virtual health visit will not automatically end after the duration time
Registration (optional)	Requires participants to register for the virtual health visit to receive the link to join See registration guide
Schedule for	Option to schedule 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

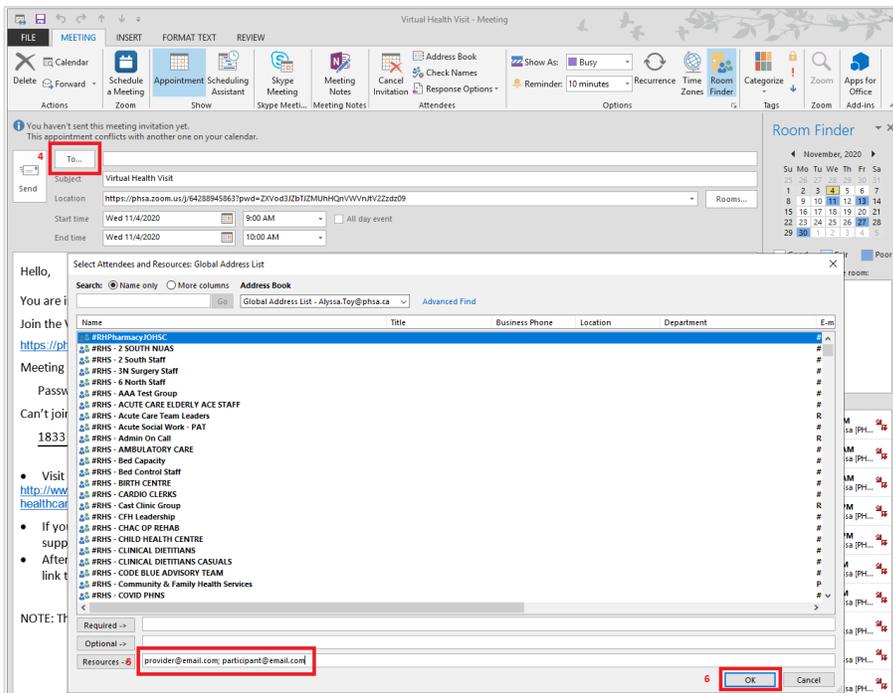
1. Click **Outlook Calendar (.ics)** to download a pre-populated Outlook calendar invitation.



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**.

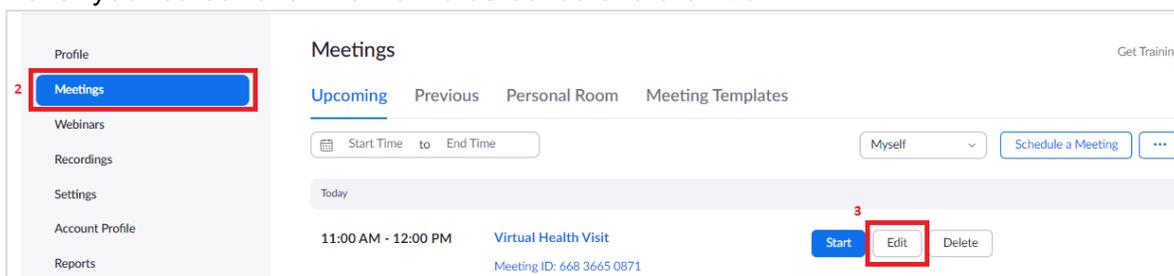




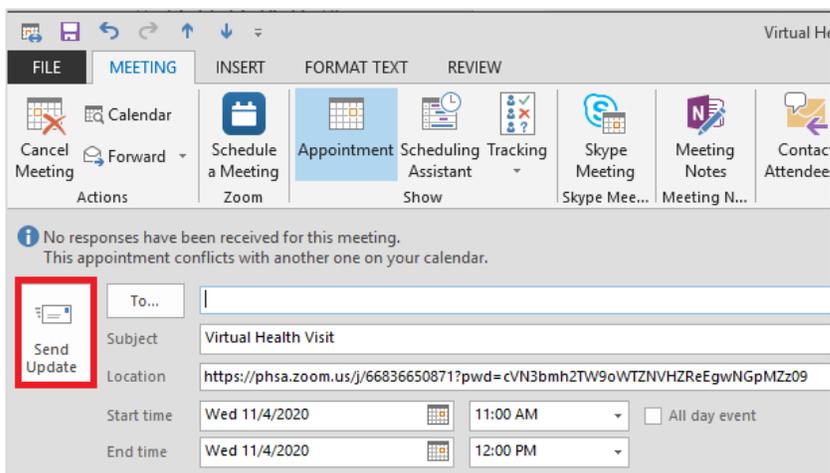
7. Click **No** on the pop up asking if you want to change the location of the event to the email addresses entered.
 - If you click **Yes**, any email addresses entered as resources appear as the location for the meeting.
8. Click **Send** to send the invitation.

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**.



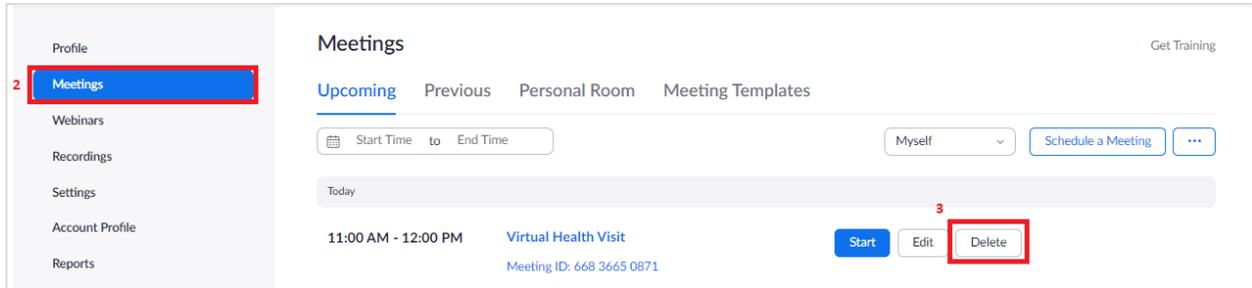
9. Edit the virtual health visit meeting details as required.
10. Click **Save** when all changes details are completed.
 - A. The meeting link, ID, and passcode will remain the same.
11. Open **Outlook Calendar event** for the virtual health visit.
12. Edit the **date and time** of the invitation as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



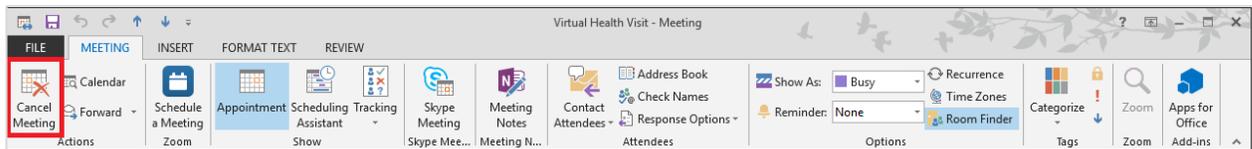


Cancelling virtual health visits

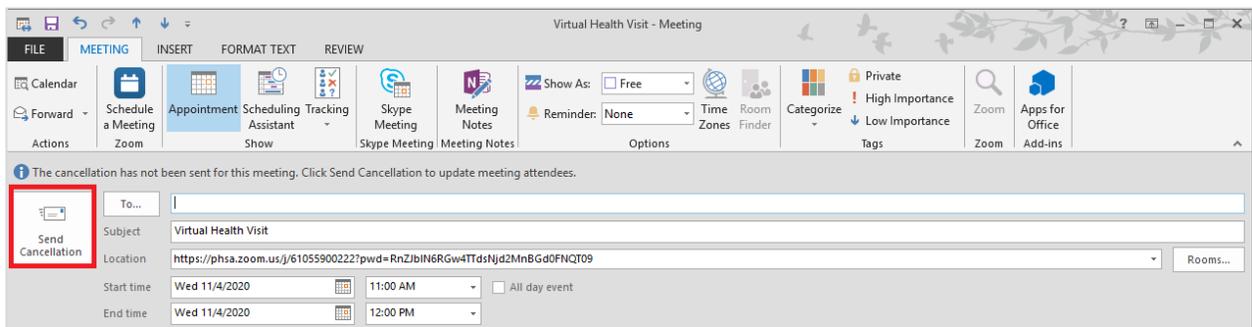
1. Sign into your Zoom for Virtual Health Visits account on the web browser - <https://zoom.us/>
2. Click on the **Meetings** tab. Under **Upcoming**, scheduled virtual health visits are listed.
3. Hover your cursor over the visit to be cancelled and click **Delete**.



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.'

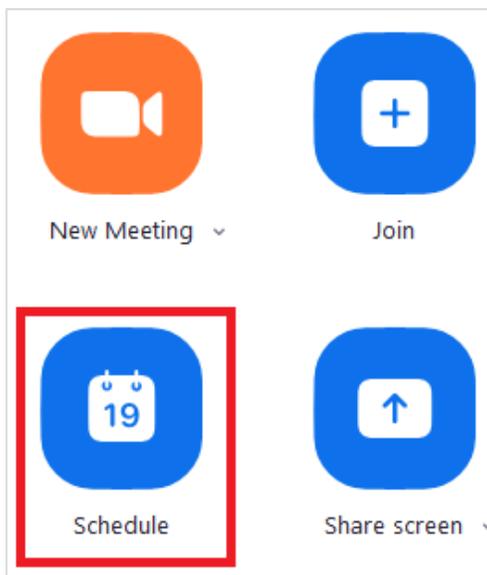
Embed passcode in invite link for one-click join

Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.



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**.

Topic	Title of the virtual health visit
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)	<p>Allow participants to join anytime - permanently un-ticked; participants cannot bypass the waiting room</p> <p>Mute participants on entry – leave as un-ticked to reduce participant audio issues</p> <p>Only authenticated users can join – leave as un-ticked to allow participants to join without a Zoom account</p> <p>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.</p>

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**.



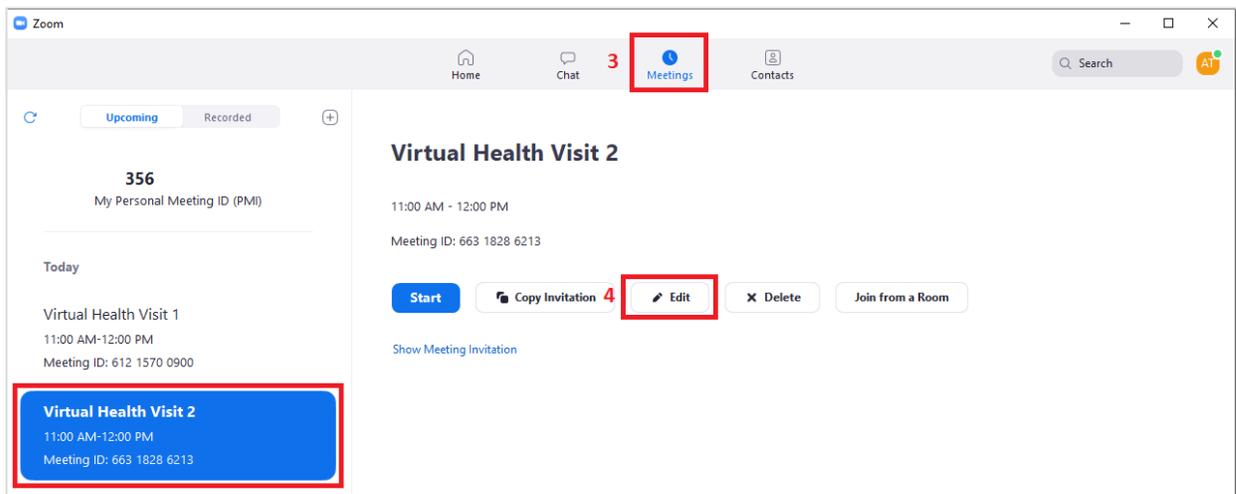
The screenshot shows the Outlook 'MEETING' ribbon with various options like Calendar, Appointment, and Meeting. A meeting invitation for 'Virtual Health Visit' is being edited. The 'Room Finder' pop-up is visible on the right, and the 'Select Attendees and Resources' dialog box is open in the foreground, showing a list of resources and an email address 'provider@email.com; patient@email.com' entered in the Resources field.

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.

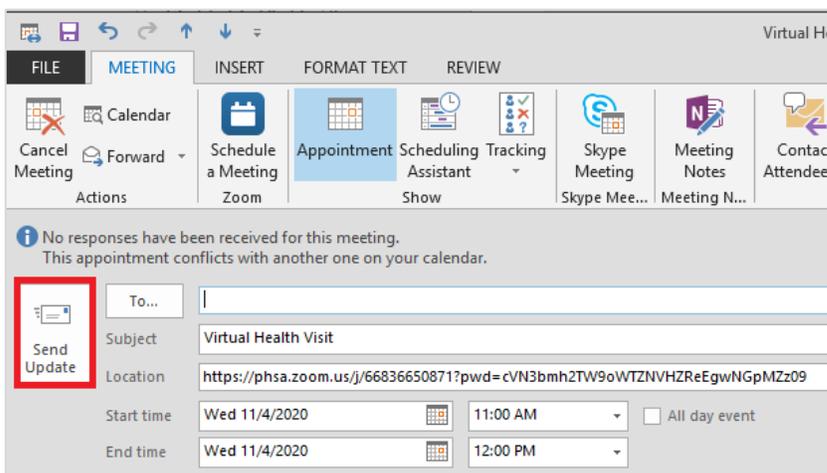
Editing virtual health visits

1. If you have the [Zoom Outlook plugin](#) 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**.

Providing support for Zoom for Healthcare to:



5. Edit the virtual health visit meeting details as required.
6. Click **Save** when all changes details are completed.
 - A. 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.



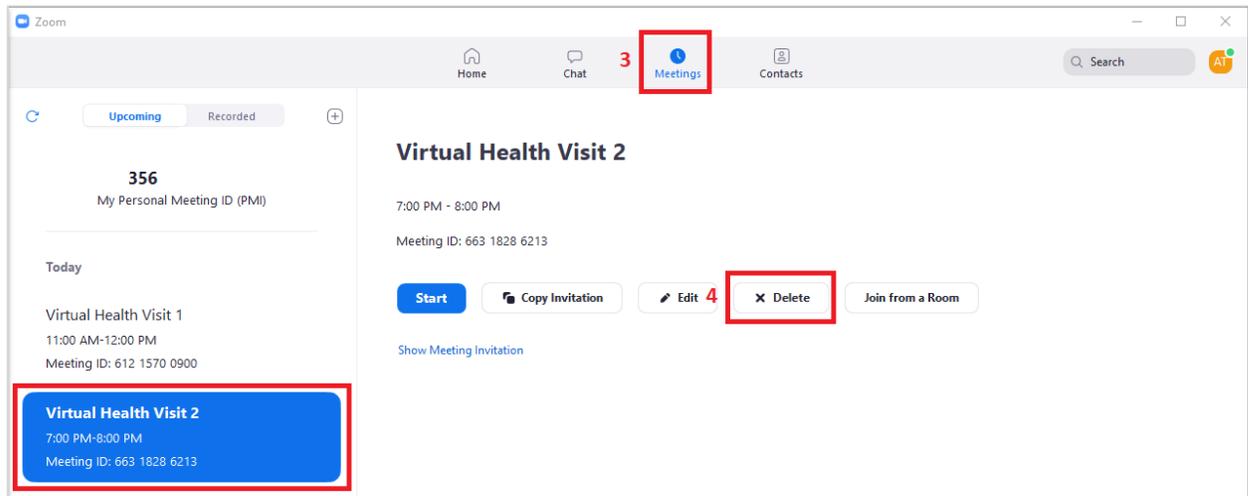


Cancelling virtual health visits

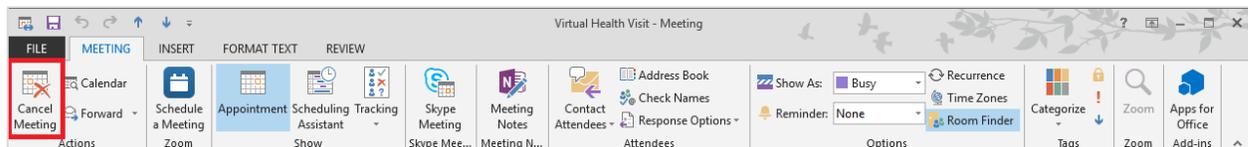
1. If you have the [Zoom Outlook plugin](#) installed, you can cancel the virtual health visit from within Outlook.

If you do not have the plugin installed, proceed with the steps below.

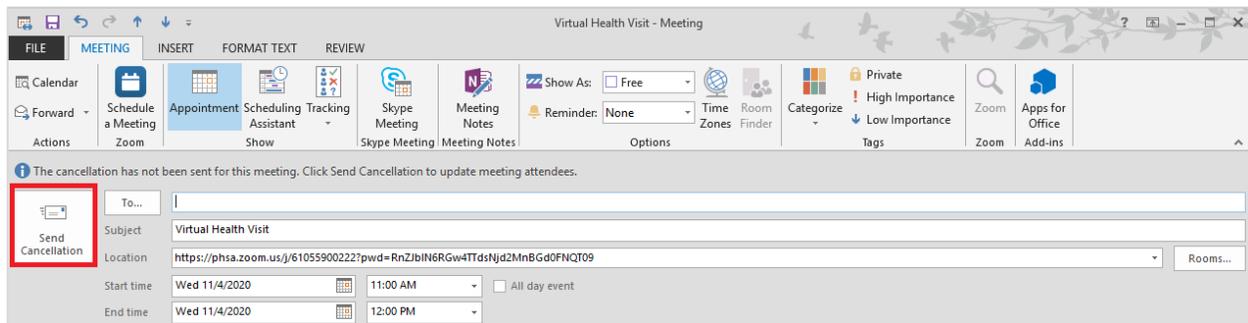
2. Sign into your Zoom for Virtual Health Visits account on the desktop application.
3. Click on the **Meetings** tab and select the virtual health visit you wish to cancel.
4. Click **Delete**.



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.'

Embed passcode in invite link for one-click join

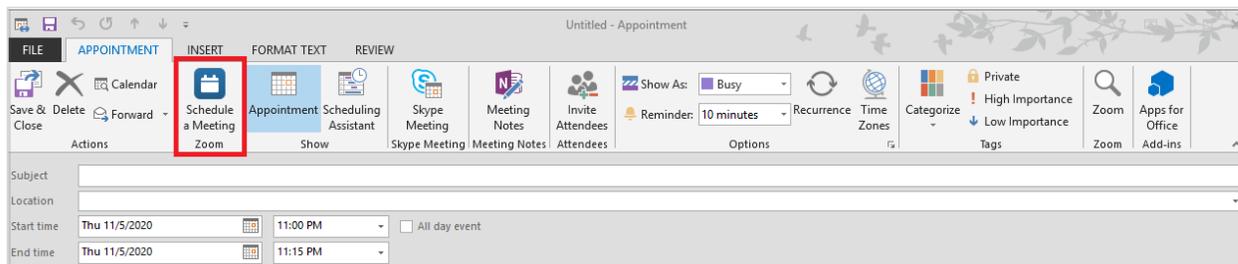
Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.





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**.



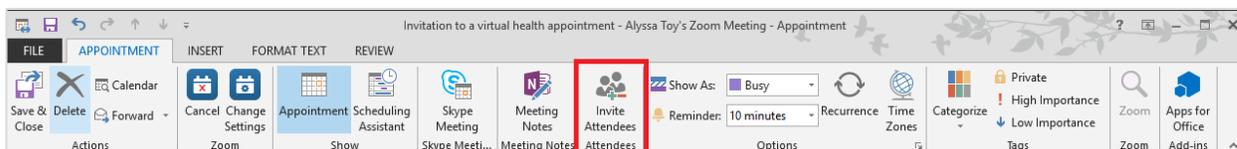
4. Complete virtual health visit **meeting details**.

Meeting ID	Leave as Generate Automatically
Password	Permanently enabled for security purposes
Video	Change to 'on' for host and participant
Audio	Change to 'Telephone and Computer Audio'
Purpose of the virtual health visit	Select the purpose from the dropdown options
Advanced Options (click to view options)	<p>Enable Waiting Room – permanently enabled for security purposes</p> <p>Enable join before host – permanently un-ticked as participants must enter the waiting room before entering the virtual health visit</p> <p>Mute participants upon entry – leave as un-ticked to reduce participant audio issues</p> <p>Only authenticated users can join: Sign in to Zoom – leave as un-ticked to allow participants to join without a Zoom account</p> <p>Force include Join URL in location field – leave as ticked</p> <p>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.</p> <p>Schedule for - Option to schedule the session on behalf of someone else, e.g. a provider. See scheduling privileges guide.</p> <p>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.</p>

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**.

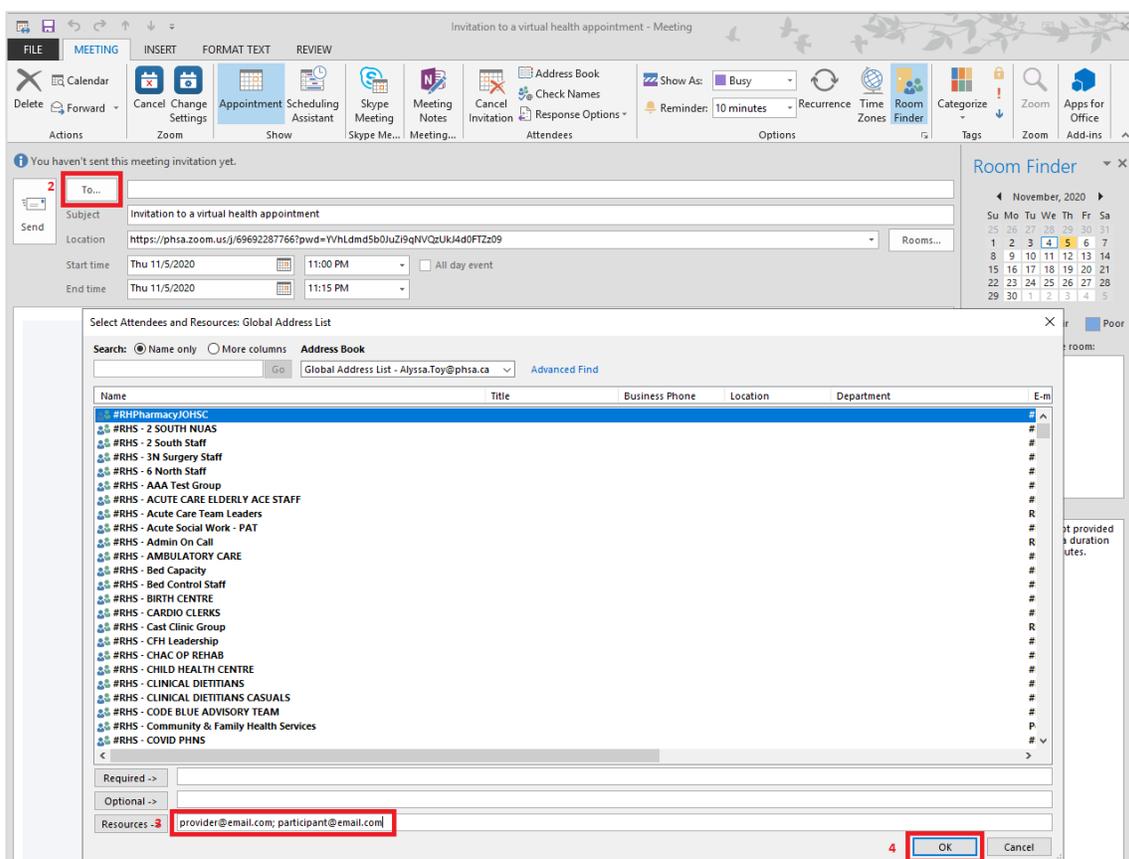


2. Click **To....**

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.

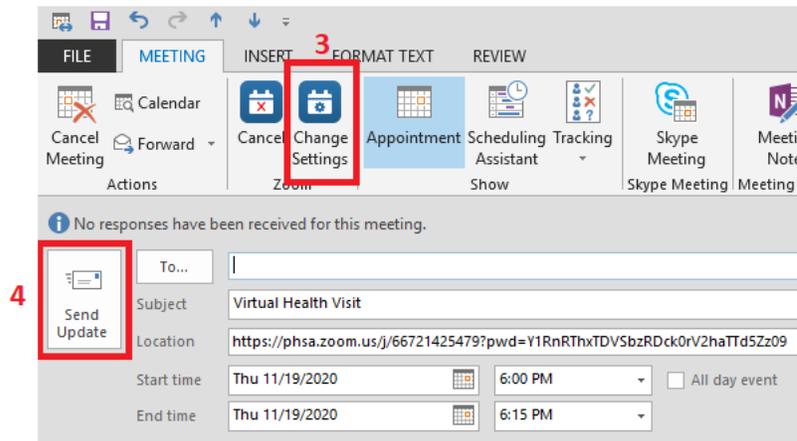
6. Click **Send** to send the invitation.

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.

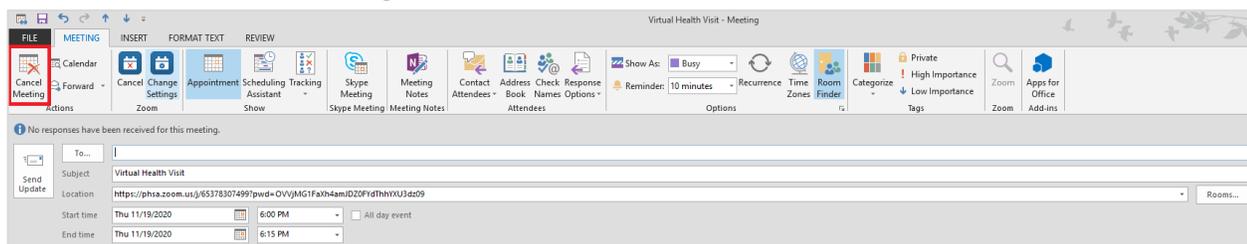


Changes to the virtual health visit will automatically reflect in the 'Meetings' tab in the Zoom desktop application.

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.

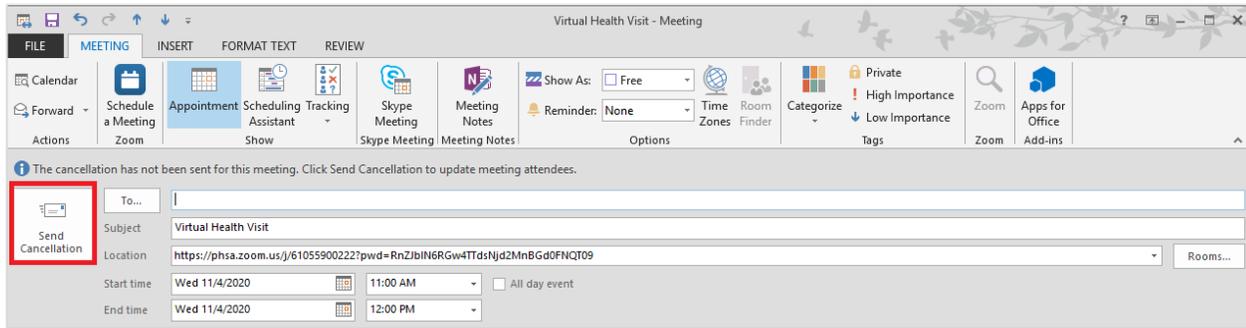
Cancelling virtual health visits

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** version of Zoom to schedule a virtual health visit with registration.
 - The **desktop application** does not include this option.

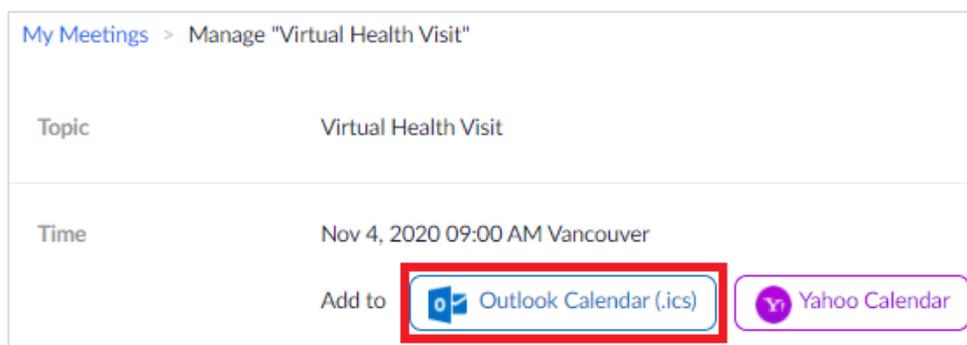
Schedule the virtual health visit with registration required

1. Follow [steps 1-4](#) to schedule the virtual health visit.
2. Tick the **Required** box in the Registration section.



Registration Required

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.



My Meetings > Manage "Virtual Health Visit"

Topic: Virtual Health Visit

Time: Nov 4, 2020 09:00 AM Vancouver

Add to:

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.

Registration Email Settings Branding Poll

Manage Attendees Registrants: 0 [View](#)

Registration Options Automatically Approved **Edit**

- × Send an email to host
- × Close registration after meeting date
- ✓ Allow attendees to join from multiple devices
- ✓ Show social share buttons on registration page

Want a webinar instead of a meeting? [Convert this Meeting to a Webinar](#)

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

Registration

Registration Questions Custom Questions

Approval

Automatically Approve
Registrants will automatically receive information on how to join the meeting.

Manually Approve
The organizer must approve registrants before they receive information on how to join the meeting.

Notification

Send an email to host when someone registers

Other options

Close registration after event date

Allow attendees to join from multiple devices

Show social share buttons on registration page

[Save All](#) [Cancel](#)

4. Click the **Questions tab** to modify registration questions.
 - A. **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.
 - B. **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**.

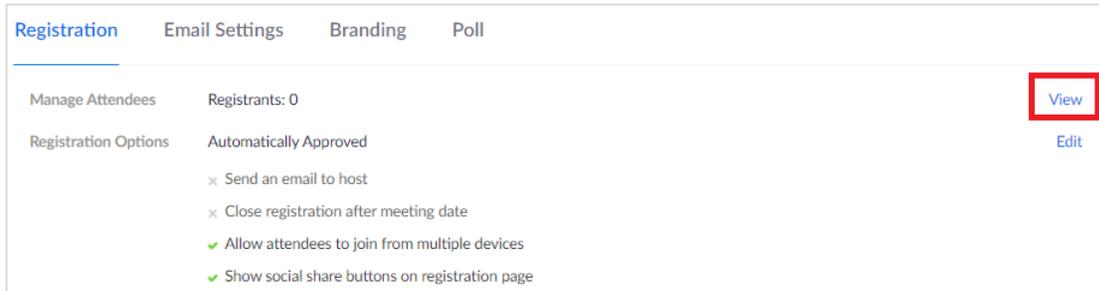
The screenshot shows a registration link: <https://phsa.zoom.us/meeting/register/u5MucOqtrzM7TIQn9uqXyubYp>. A red box highlights the 'Copy Invitation' button. Below it, a 'Copy Meeting Invitation' dialog box is shown. The dialog contains the following text: 'Hi there, You are invited to a Zoom meeting. When: Nov 4, 2020 01:00 PM Vancouver Register in advance for this meeting: https://phsa.zoom.us/meeting/register/u5EvdusqTooHtFAEvS6hmvEmjd08Aeb9na7 After registering, you will receive a confirmation email containing information about joining the meeting.' A red box highlights the 'Copy Meeting Invitation' button at the bottom of the dialog.

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:
 - A. If conducting a **1:1 virtual health visit**, enter the participant's email address in the **'To'** field.
 - B. 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/>
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**.

The screenshot shows the Zoom 'My Meetings' management page. The 'Save as Template' button is highlighted with a red box. The page displays meeting details for 'My Meeting' on Feb 2, 2021, at 09:00 AM Vancouver. It includes options to add to Outlook or Yahoo calendars, a meeting ID (641 2485 1792), security settings (Passcode, Waiting Room), a registration link, video and audio settings, and meeting options. At the bottom, there are buttons for Start, Edit, Delete, and Save as Template, along with a link to convert the meeting to a webinar.

Providing support for Zoom for Healthcare to:



2. Modify the meeting template name as required.
3. Click **Save as Template**.

4. The meeting details saved to the template include:

Meeting details applied from template: (Can be edited as required)	Meeting details not applied from template: (Must be manually entered for every meeting)
<ul style="list-style-type: none"> ▪ Topic ▪ Description ▪ Recurrence ▪ Registration preference ▪ Video ▪ Audio ▪ Meeting options 	<ul style="list-style-type: none"> ▪ Date and time ▪ Scheduled for ▪ Alternative hosts ▪ Purpose of virtual health visit

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

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/>
2. Click on the **Meetings** tab.
3. Click **Meeting Templates**.
4. Click the name of the template you wish to edit.

The screenshot shows the Zoom Meeting Templates interface. On the left sidebar, the 'Meetings' tab is highlighted with a red box and labeled '2'. In the main content area, the 'Meeting Templates' tab is selected and labeled '3'. Below this, a table lists meeting templates. The first template, 'Virtual Health Visit', is highlighted with a red box and labeled '4'. The table includes columns for 'Template Name' and 'Modify Time' (Nov 4, 2020 02:22 PM), and buttons for 'Use this Template' and 'Delete'.

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

The screenshot shows the 'Edit this Meeting Template' page for 'Virtual Health Visit'. The left sidebar shows navigation options like 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area displays the template details:

- Template Name: Virtual Health Visit
- Topic: Virtual Health Visit
- Security: Passcode, Waiting Room
- Video: Host (On), Participant (On)
- Audio: Telephone and Computer Audio, Dial from Canada
- Meeting Options:
 - Allow participants to join anytime
 - Mute participants upon entry
 - Require authentication to join

 At the bottom right, the 'Edit this Meeting Template' button is highlighted with a red box.

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

The screenshot shows the 'Registration' tab in the Zoom interface, highlighted with a red box. Under 'Registration Options', the current setting is 'Automatically Approved'. There are three checkboxes:

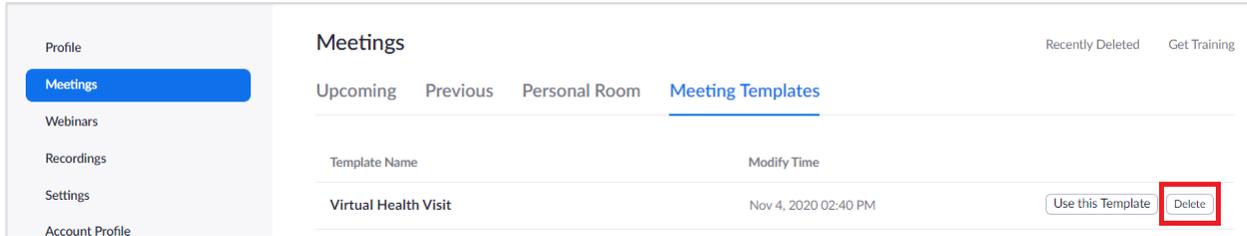
- Send an email to host
- Close registration after meeting date
- Show social share buttons on registration page

 An 'Edit' button is highlighted with a red box in the top right corner of the options section.



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

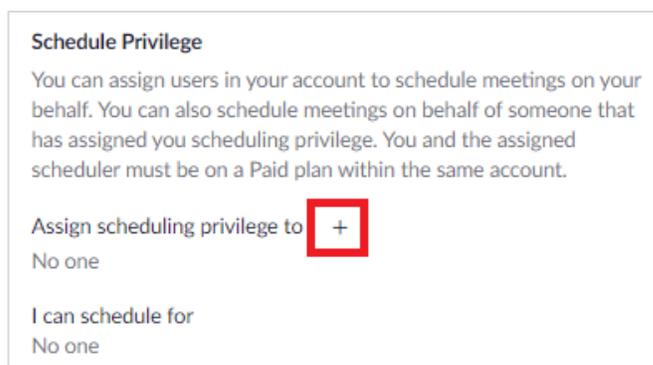
- Assign or delegate a user or multiple users in your account to schedule virtual health visits on your behalf, e.g. provider assigns scheduling privilege to those supporting scheduling.
- Allow users with scheduling privilege on your account to manage and act as an alternative host for all virtual health 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/>
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.
 - A. If scheduling privileges cannot be assigned, an error message will appear.
6. Click **Assign**.



Assign scheduling privilege

5

Enter the email addresses of those who can schedule meetings on your behalf. Use a comma to separate multiple email addresses.

6

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.

Schedule For	<input type="text" value="Myself"/>
Meeting ID	<input type="text"/>

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



Zoom Virtual Health Visits

Hosting

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Hosting with the desktop application

Recommendations

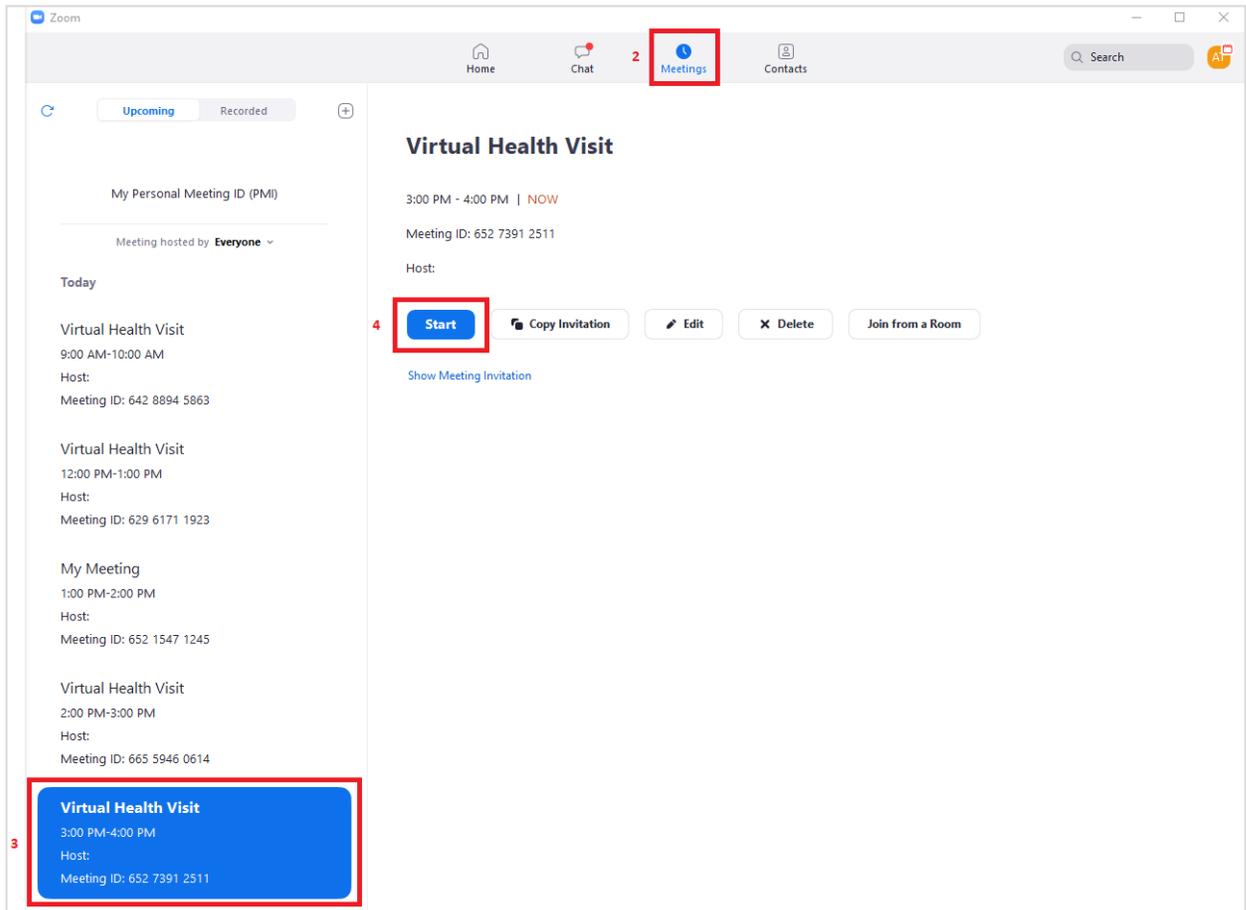
- Use the **Zoom desktop application** to host one-to-one or group virtual health visits.
- Do not use the web browser to conduct virtual health visits as visit quality may not be optimal.
- Review the [websiteside manner and etiquette](#) for virtual health visits.
- See [Appendix 4](#) to review an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

Notes

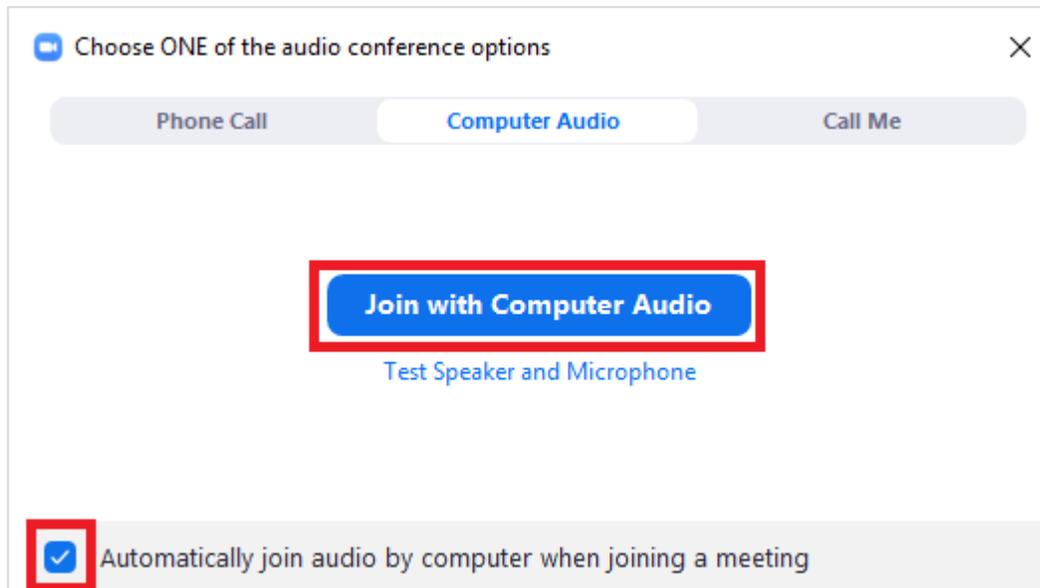
- Anyone with **scheduling privileges** to your account can start the virtual health visit on your behalf because they are automatically assigned the role of **alternative host**.
 - This means they can also manage and admit participants in the waiting room.
- If you assigned an **alternative host(s)** 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**.

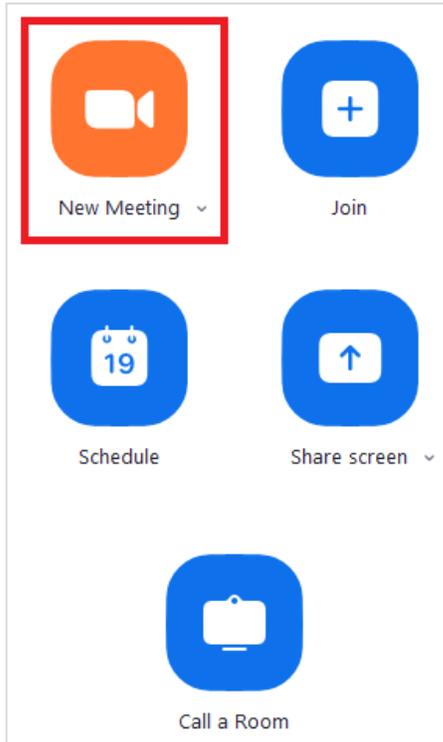


- 5. Select to **Join with Computer Audio** if you have a microphone and speaker connected. We recommend using a headset.
 - A. You can save this preference for future Virtual health visits by checking the box to **Automatically join audio by computer when joining a meeting**.



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.
 - A. 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

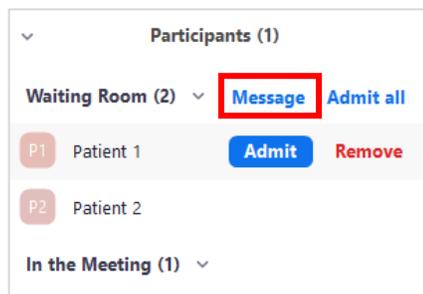
Waiting rooms are permanently enabled on the Zoom for Virtual Health Visits instance for enhanced security.

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 some 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.
 - A. Alternatively, click **Admit all** to admit all participants at once.
 - B. 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.
 - A. 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.
 - B. 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.



Provincial Health Services Authority
Province-wide solutions.
Better health.



BRITISH COLUMBIA



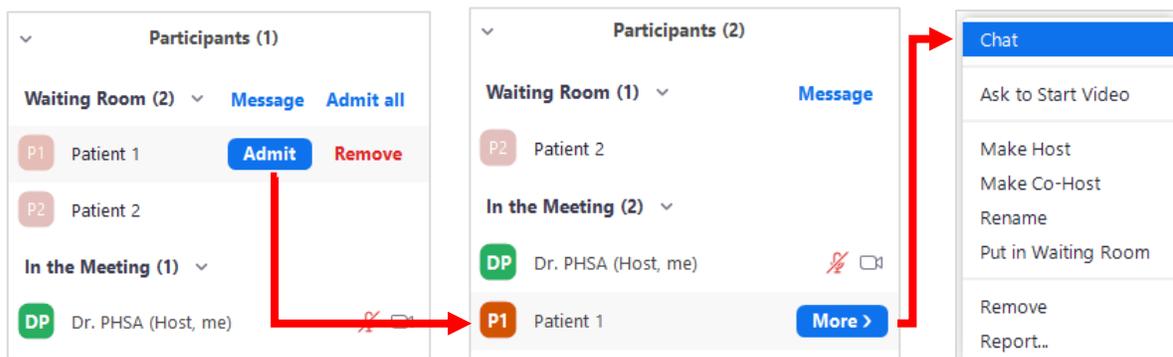
COMMUNITY LIVING
BRITISH COLUMBIA



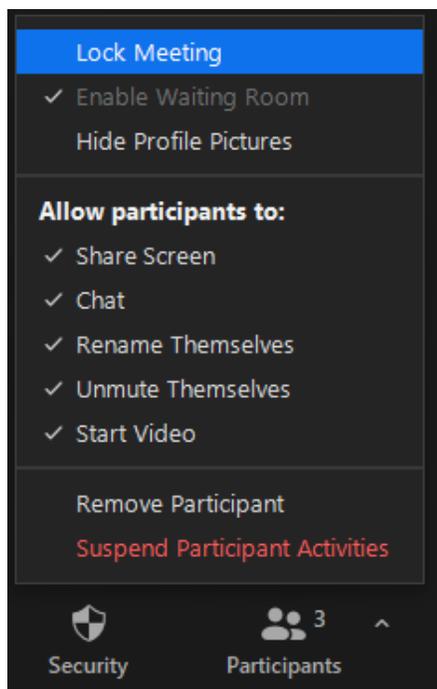
island health



Providence
HEALTH CARE



5. **Recommended:** Lock the virtual health visit after all participants have joined*.
 - A. Click **Security** and select **Lock Meeting**.
 - B. *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.

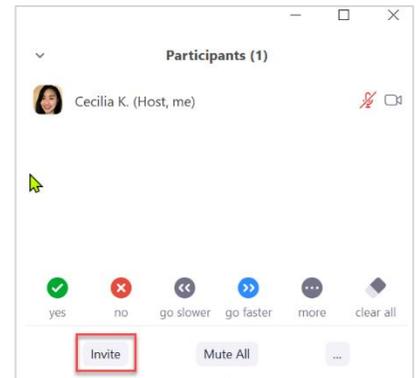
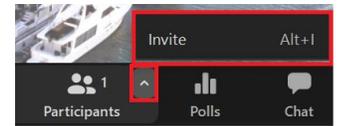
If the participant does have a device with video capability, the host may also convert this audio call to a video call during the virtual health visit if necessary.

Requirements

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

Invite participants to join via phone

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



- A dialog box will appear. Click on the **Phone** tab.

Invite people to join meeting 619 6347 0581

Contacts Zoom Rooms Room System Email **Phone**

Invitee Name

Phone Number

Invite

Copy Invite Link Copy Invitation Meeting Passcode: 655980

Providing support for Zoom for Healthcare to:



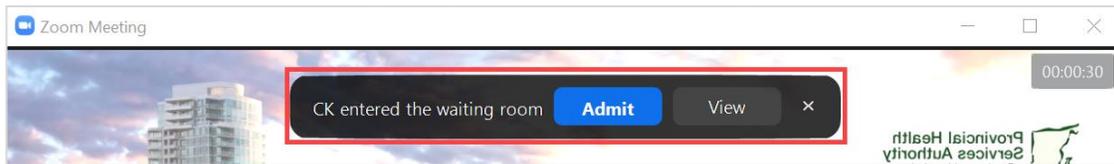
4. Enter the name of the participant you are calling in the **Invitee** field.

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.

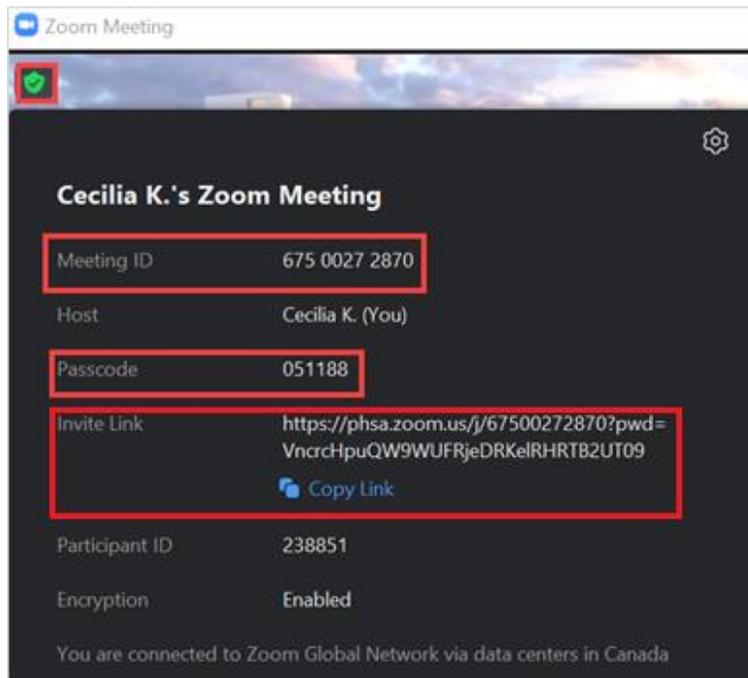
Requirements

- 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.

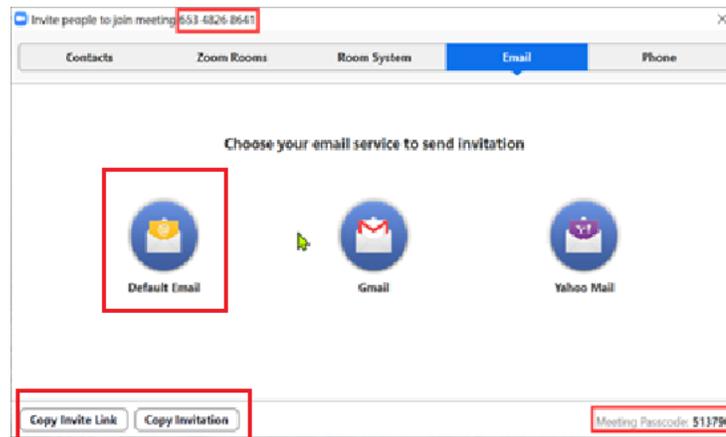
1. **While connected over the phone**, the host provides the virtual health visit information (i.e. invitation link, **meeting ID** and **passcode**) to the participant. This information can be found in 2 places:
 - a. Click the **green icon** at the top left of the Zoom window. A black dialog box will open.



Providing support for Zoom for Healthcare to:



- 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.



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 [webside manner and etiquette](#) for virtual health visits.

Download Zoom Cloud Meetings app

Apple iOS

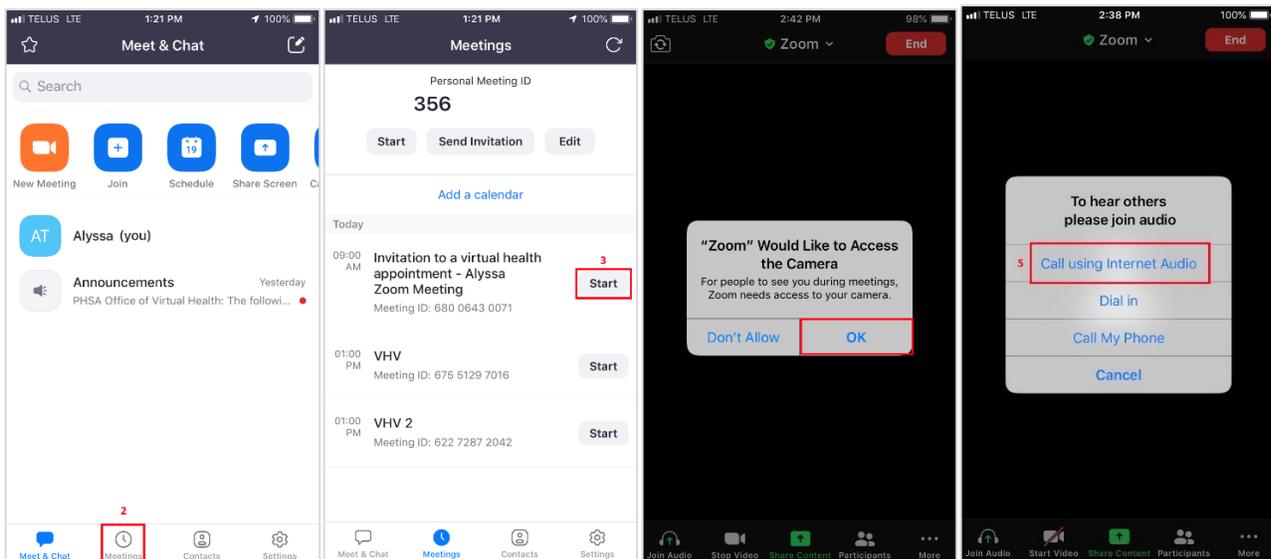
Requires iOS 8.0 or later.
Compatible with iPhone, iPad, and iPod touch.

Android

Requires Android 5.0 and up

Starting a scheduled virtual health visit

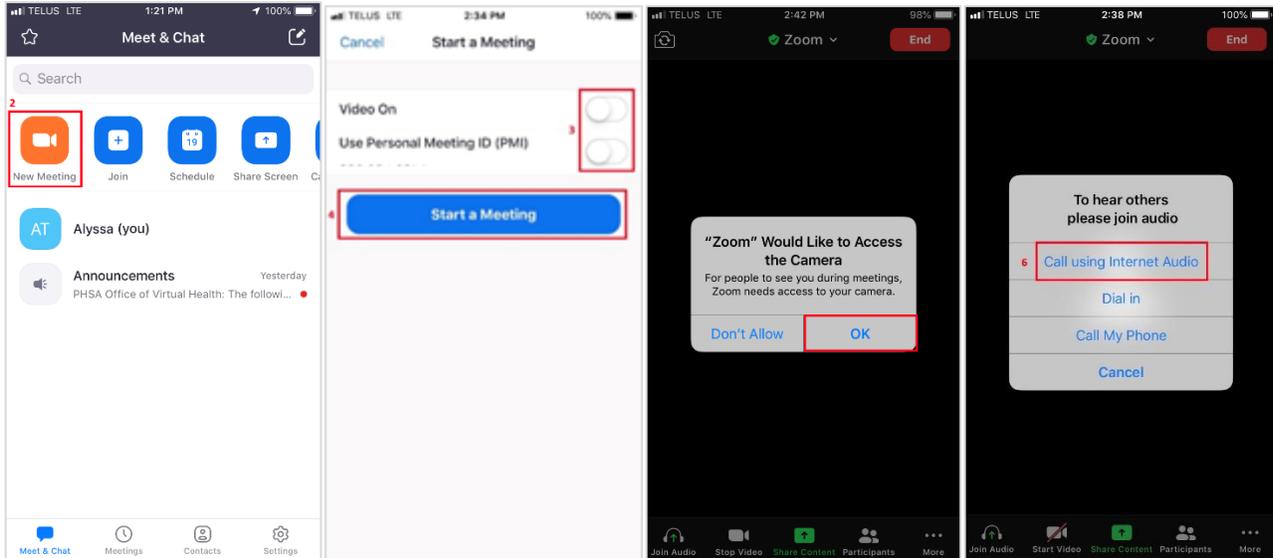
1. Open the **Zoom Cloud Meetings app** and sign into your Zoom for Virtual Health Visits account.
2. Tap **Meetings**.
3. Tap **Start** next to upcoming virtual health visit.
4. If you are using Zoom on a device for the first time, **allow access to your camera and microphone**.
5. Select **Call using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

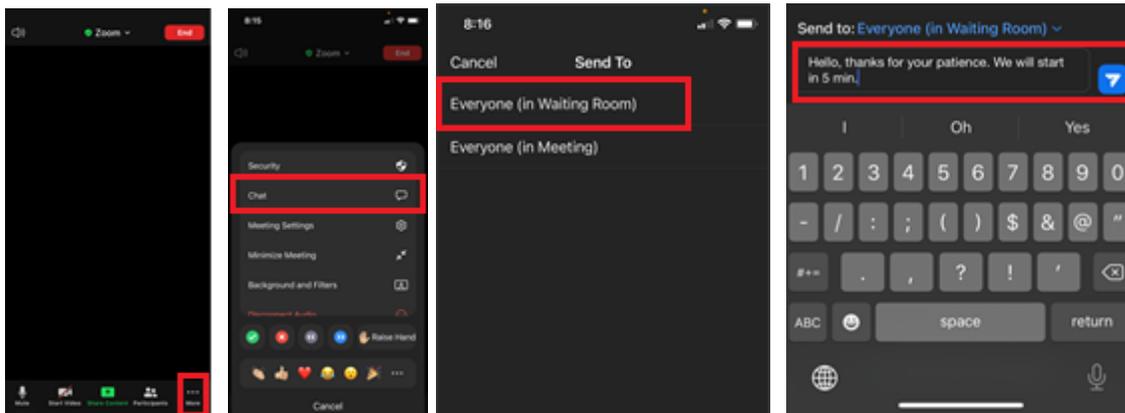
Waiting rooms are permanently enabled on the Zoom for Virtual Health Visits instance for enhanced security.

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.

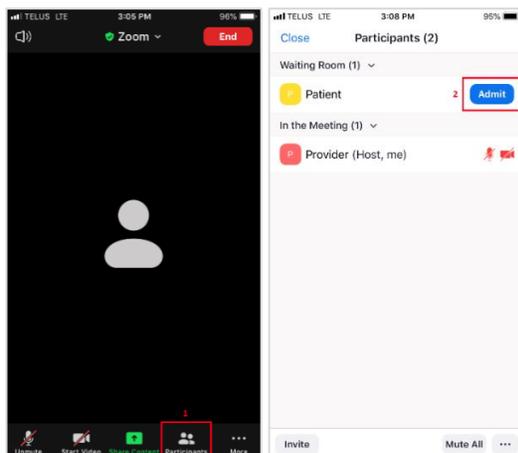
If you would like to, or not like to, hear a sound notification when someone enters the waiting room, adjust your [Zoom for Virtual Health Visits account settings](#).

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.
 - A. From the toolbar, tap **More**.
 - B. Tap **Chat**.
 - C. Send to **Everyone (in Waiting Room)**
 - D. Type your message and send.



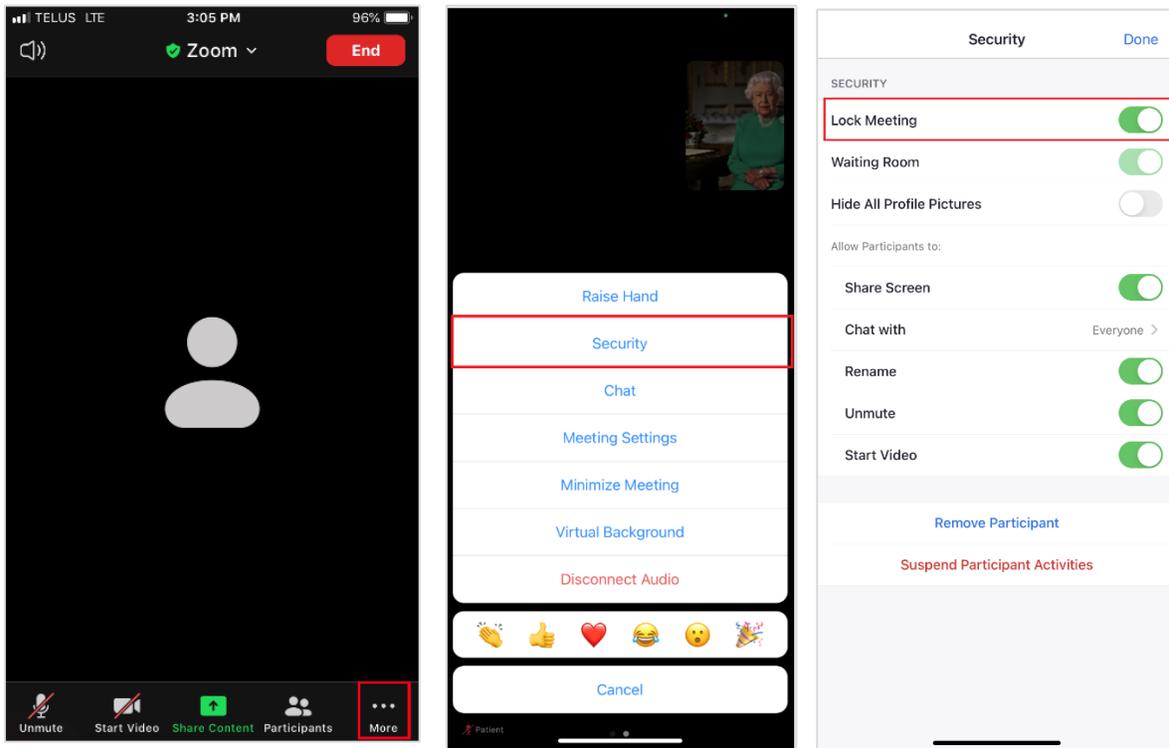
3. Tap **Admit** next to the participant's name.





4. **Confirm the identity** of the virtual health visit participant.
5. **Recommended:** Lock the virtual health visit after all participants have joined*.
 - A. From the toolbar, tap **More**.
 - B. Tap **Security**.
 - C. Toggle **Lock Meeting** to 'on'.
 - D. 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

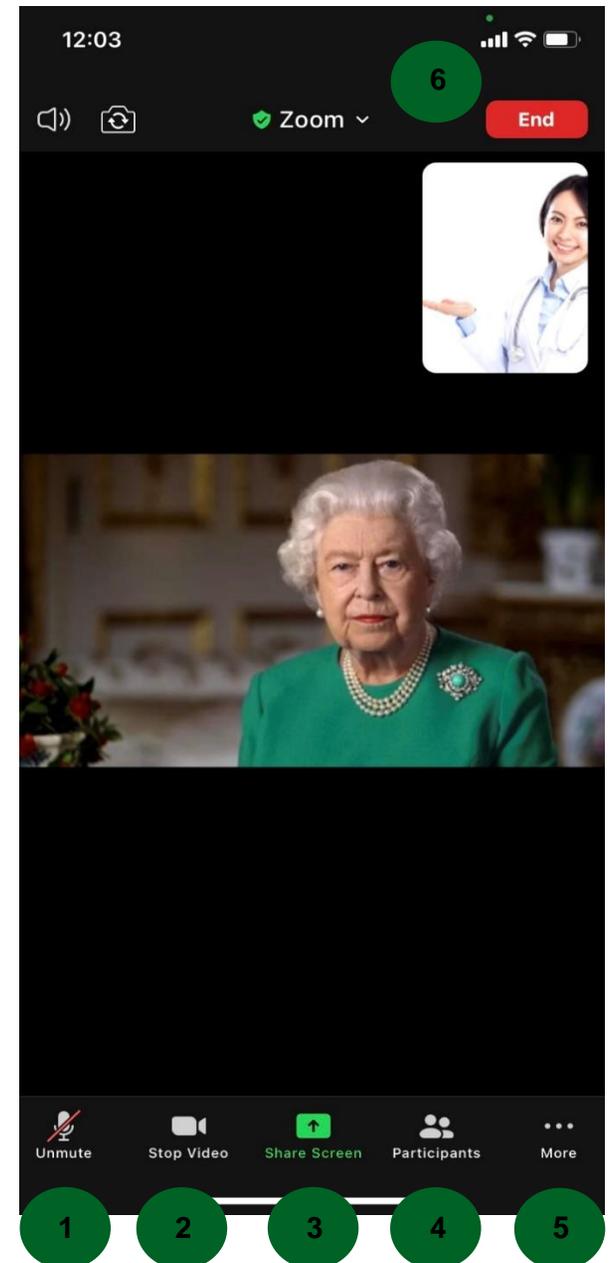
- View participants in the virtual health visit
- View and admit participants in the waiting room
- Tap participant's name to manage participant
- Tap **Invite** to invite additional participants

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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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>

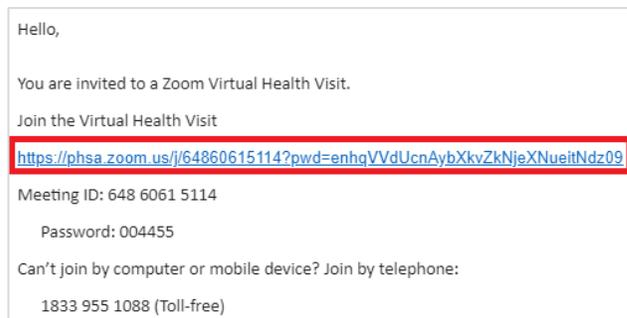
Do you need a Zoom for Virtual Health Visits account to join?

No! You can join without an account. An account is only required to host the virtual health visit.



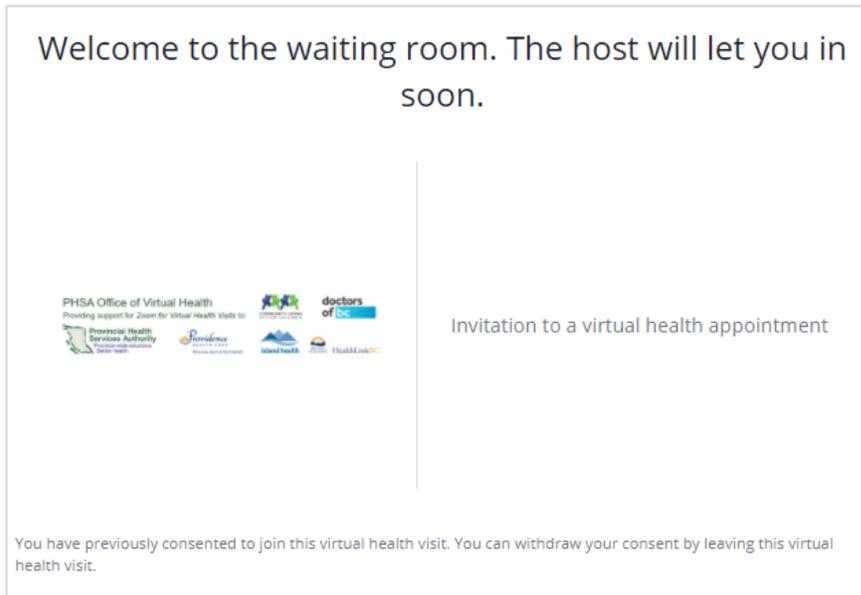
Join your virtual health visit

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.
 - A. Click on the file (bottom-left corner) when it is done downloading.
 - B. Click **Run** to complete the installation.
4. If you cannot download or run the desktop software:
 - A. Download the [Zoom Cloud Meetings app](#) on your Apple/Android smartphone or tablet to join, or
 - B. 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.

Providing support for Zoom for Healthcare to:

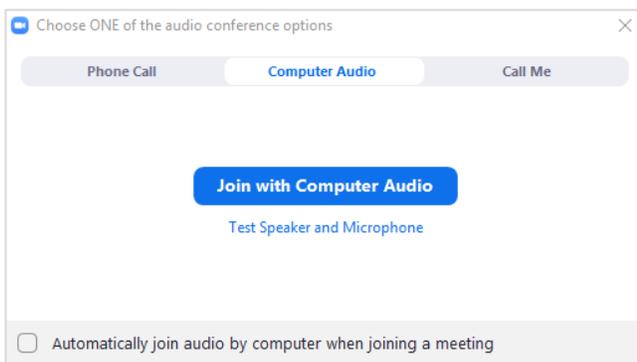


Choose your audio settings

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

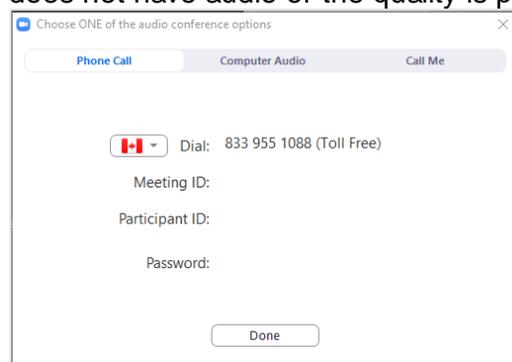
1. Use computer audio

- 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

A screenshot of the Zoom meeting controls bar with several instructional callout boxes. The controls bar includes buttons for Unmute, Start Video, Participants (2), Chat, Share Screen, Reactions, and a red Leave button. The callouts provide instructions on how to use these features: unmute/mute microphone, start/stop video, opening the chat function, typing and sending messages, and leaving the meeting.

Click to **unmute** and **mute** your **microphone**

Click to **start** and **stop** your **video**

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 **leave** the virtual health visit when it is finished



Joining from a smartphone or tablet

Download the 'Zoom Cloud Meetings' app.

Apple iOS: Needs iOS 8.0 or higher. Compatible with iPhone, iPad and iPod touch. apps.apple.com



Android: Needs Android 5.0 or higher. play.google.com



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>

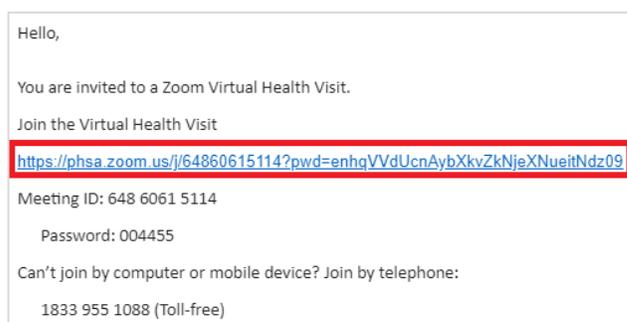
Do you need a Zoom for Virtual Health Visits account to join?

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.

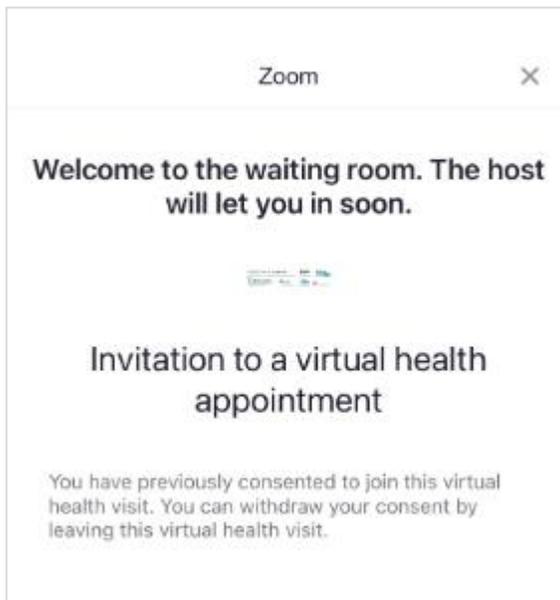


3. A. If your device already has the **Zoom Cloud Meetings app**, it will open automatically.
B. If your device does not have the **Zoom Cloud Meetings app**, your browser will open with a link to download it from the app store.
 - A. Download the free **Zoom Cloud Meetings app** and go back to your virtual health visit invite and tap the URL link again.

Providing support for Zoom for Healthcare to:



4. If you cannot download or run the mobile app:
 - A. Join from a computer or laptop by downloading the [Zoom Client for Meetings](#), or
 - B. 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.



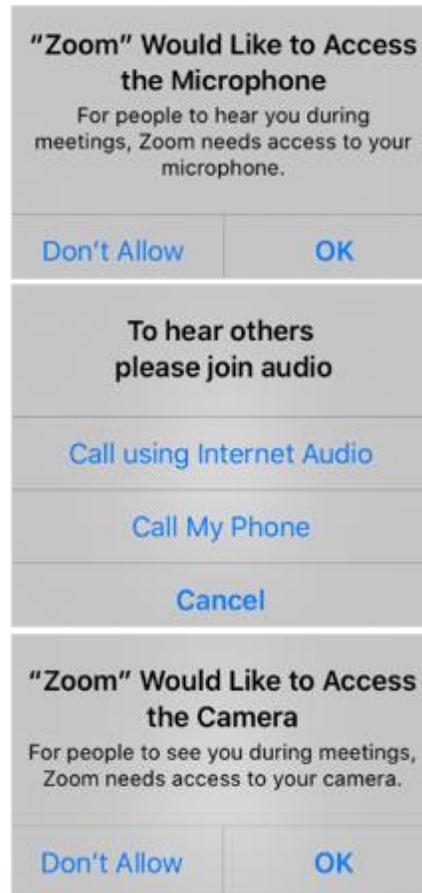


Allow Zoom to use your microphone and camera

(only needs to be done the first time you use the app)

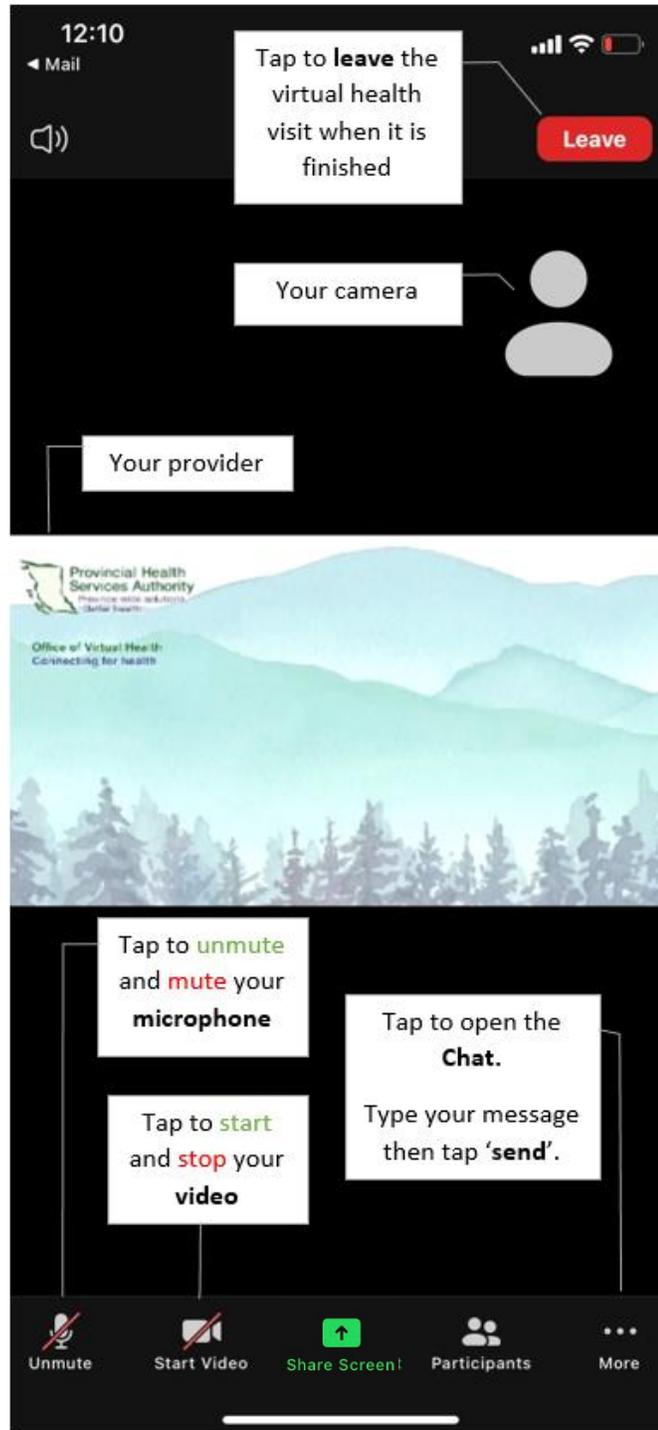
After being admitted into the virtual health visit:

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





Zoom Webinars

Scheduling

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<i>Set registration and limit participant number</i>	<i>66</i>
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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**.

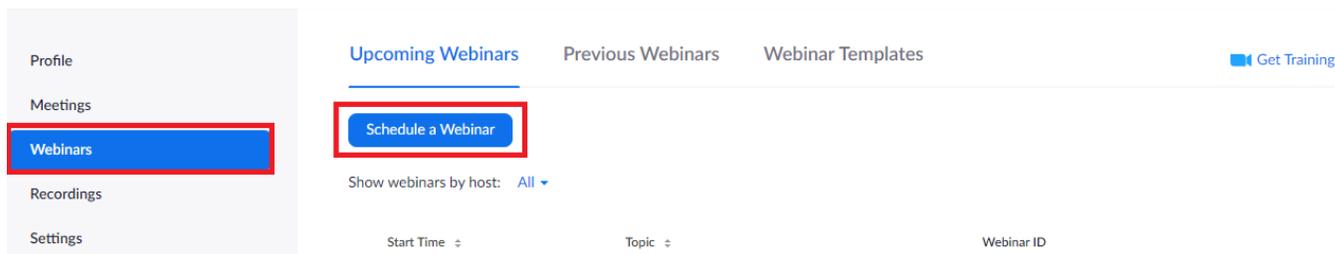
Requirements

- 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**.

Topic	Title of the webinar
Description (optional)	A description of the webinar
When	The intended date and start time

Providing support for Zoom for Healthcare to:

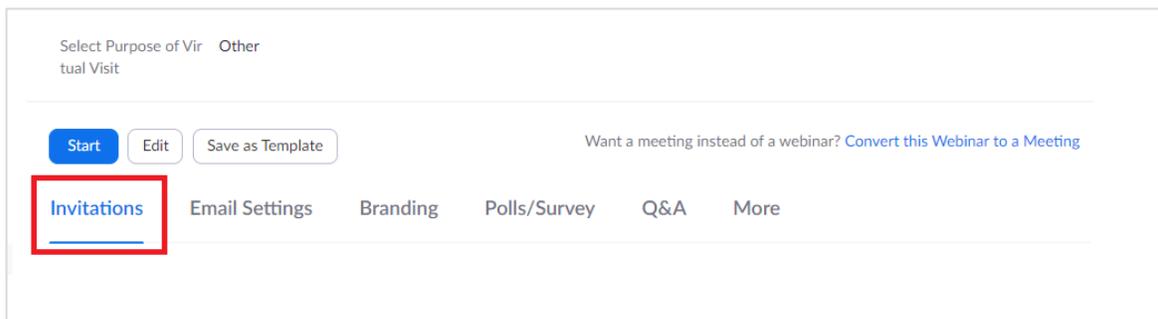


Duration	The intended length of the webinar The webinar will not automatically end after the duration time
Registration (required)	Requires participants to register for the webinar to receive the link to join See registration guide
Schedule for	Option to schedule the webinar on behalf of someone else, e.g. a provider See scheduling privileges guide
Template	Select a template to schedule from See templates for scheduling virtual health visits guide
Security – Passcode	Permanently enabled for security purposes
Video	Change to 'on' for host and panelist
Audio	Leave as 'Both'
Webinar Options	Q&A – allow question and answer sessions. Enable practice session Requires authentication to join Approve or block entry for users from specific countries/regions
Purpose of the virtual health visit	Select 'patient education' from the purpose drop down options.
Alternative Hosts	The alternative host must have a Zoom for Virtual Health Visits account. Alternative hosts can: <ul style="list-style-type: none"> ○ Start the webinar on behalf of the main host ○ Admit participants from the waiting room into the webinar

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.

Providing support for Zoom for Healthcare to:



Start Edit Save as Template [Want a meeting instead of a webinar? Convert this Webinar to a Meeting](#)

Invitations Email Settings Branding Polls/Survey Q&A More

Invite Panelists No panelists invited [Import from CSV](#) [Edit](#)

Invite Attendees Webinar Size: 500 attendees [Copy Invitation](#) [Send Invitation to Me](#)

Link to join Webinar
<https://phsa.zoom.us/j/69207316117?pwd=QWUvb2JUVXFSaXlhcHRKR0tu...>

Registration Settings No Registration Required [Edit](#)

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](#)).

Registration ×

Registration Questions Custom Questions

Registration

Required

Approval

Automatically Approve
 Registrants will automatically receive information on how to join the webinar.

Manually Approve
 The organizer must approve registrants before they receive information on how to join the webinar.

Notification

Send an email to host when someone registers

Other options

Close registration after event date

Restrict number of registrants
 500
 If you restrict the number of registrants, no one will be able to register after reaching this limit.

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.

The screenshot shows the Zoom Email Settings interface. At the top, there are buttons for 'Start', 'Edit', and 'Save as Template'. A link says 'Want a meeting instead of a webinar? Convert this Webinar to a Meeting'. Below this is a navigation bar with 'Invitations', 'Email Settings' (highlighted with a red box), 'Branding', 'Polls/Survey', 'Q&A', and 'More'. The main content area lists various email settings with 'Edit' links:

Select Email Language: English	Edit
Email Contact: Cecilia K., cecilia.kim@phsa.ca	Edit
Invitation Email to Panelists	Edit
Confirmation Email to Registrants Send upon registration	Send me a preview email Edit
No reminder email to Attendees and Panelists	Edit (highlighted with a red box)
No follow-up email to Attendees	Edit
No follow-up email to Absentees	Edit

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

The screenshot shows the 'Reminder Email' section of the Zoom interface. It includes the heading 'Reminder Email' and the instruction 'Send Reminder Email to Approved Registrants and Panelists'. There are three radio button options:

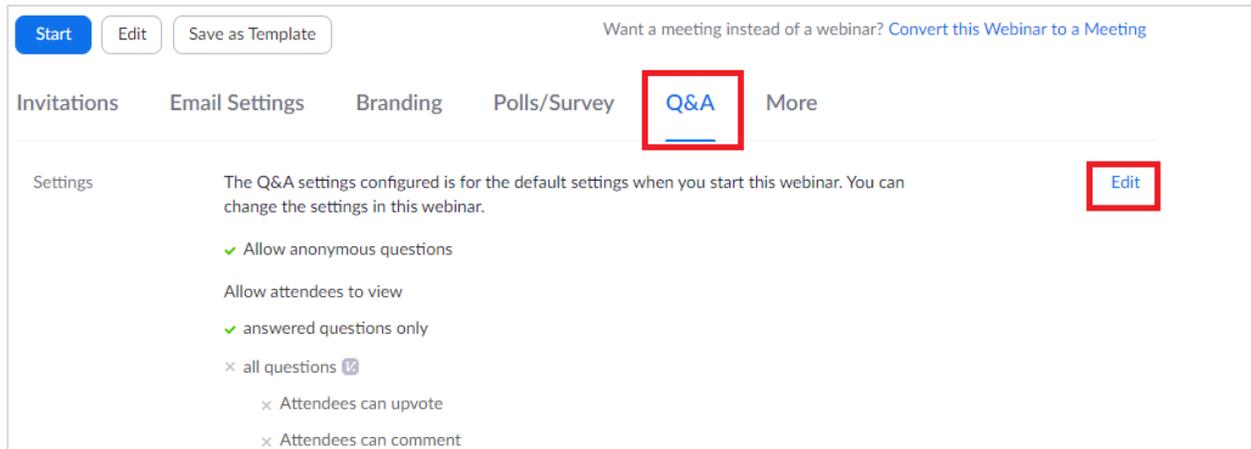
- 1 hour before the webinar start date and time
- 1 day before the webinar start date and time
- 1 week before the webinar start date and time

4. Click **Save**.



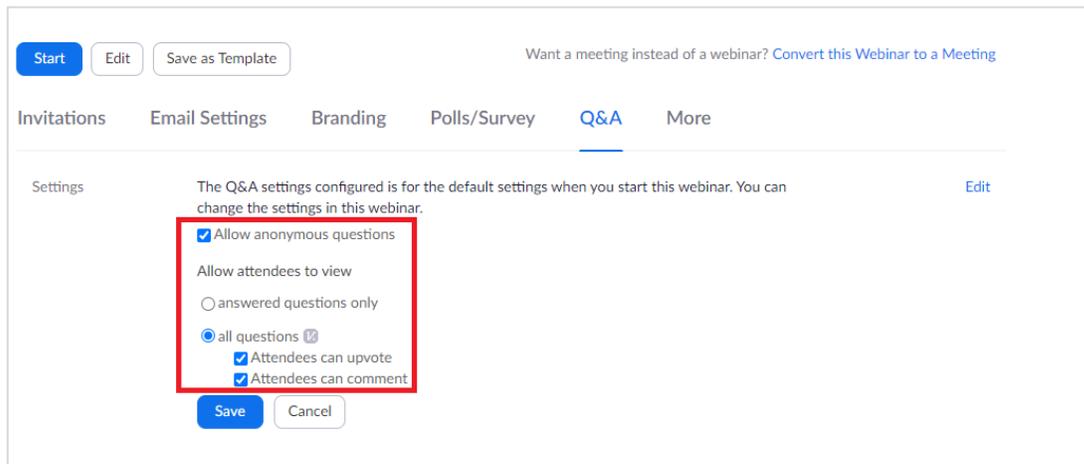
Set up Q&A

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.

The screenshot shows the Zoom Webinars interface. At the top, there are tabs for 'Upcoming', 'Previous', and 'Webinar Templates'. Below these is a search bar with 'Start Time' and 'End Time' fields, a dropdown menu set to 'Myself', and a 'Schedule a Webinar' button. A 'Get Training' link is in the top right. Under the 'Today' section, a webinar titled 'Test' is listed for the time '08:00 PM - 09:00 PM'. The 'Test' title is highlighted with a red box. Below the title is the 'Webinar ID: 628 3405 7541'. To the right of the title are three buttons: 'Start' (highlighted with a red box), 'Edit', and 'Delete'.

3. In the **Invitations** tab, select the **Edit** button in the **Invite panelists** section.

The screenshot shows the Zoom Invitations interface. At the top, there are tabs for 'Invitations', 'Email Settings', 'Branding', 'Polls/Survey', 'Q&A', and 'More'. The 'Invitations' tab is highlighted with a red box. Below the tabs, there are two main sections: 'Invite Panelists' and 'Invite Attendees'. The 'Invite Panelists' section shows 'No panelists invited' and has an 'Import from CSV' link and an 'Edit' button (highlighted with a red box). The 'Invite Attendees' section shows 'Webinar Size: 500 attendees' and has 'Copy Invitation' and 'Send Invitation to Me' links. Below this is a 'Link to join Webinar' with the URL: 'https://phsa.zoom.us/j/62834057541?pwd=RUpUdmxBK3pwSXhVWGJUczl...'

4. Enter a name and email address to invite them.



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.



Registration ×

Registration Questions Custom Questions

Registration

Required

Approval

Automatically Approve
Registrants will automatically receive information on how to join the webinar.

Manually Approve
The organizer must approve registrants before they receive information on how to join the webinar.

Notification

Send an email to host when someone registers

Other options

Close registration after event date

Restrict number of registrants

ⓘ The webinar supports up to 500 attendees

If you restrict the number of registrants, no one will be able to register after reaching this limit.

Allow attendees to join from multiple devices

Show social share buttons on registration page

Enable Disclaimer ⓘ

2. **Save** webinar details.

Do not send registration link out to participants yet.

3. Email 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.

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:

License Type	Licensed ⓘ
Meeting	500 participants ⓘ
Webinar	500 participants ⓘ

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

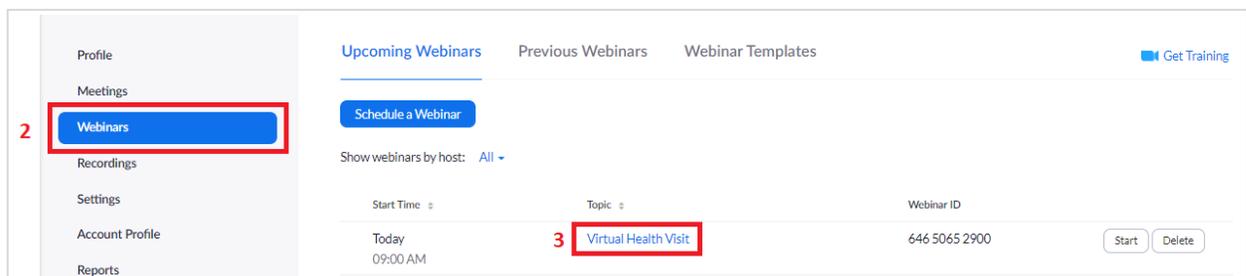
- Webinars are designed so that only the host and any designated panelists (presenters) can share their video, audio and screen. Webinars allow view-only attendees that have the ability to interact with the panelists via Q&A, chat, and answering polling questions.
- For best privacy and security practice,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

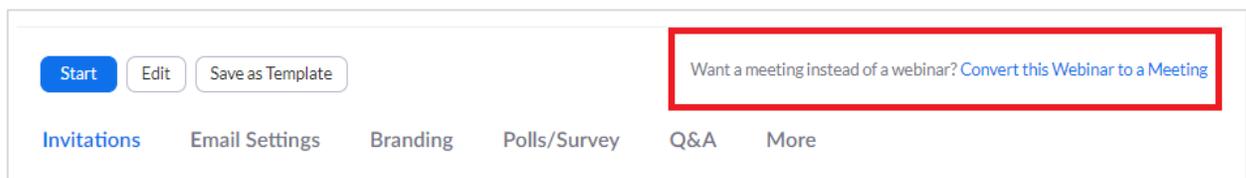
- Use the web browser version of Zoom to convert webinars to meetings. This cannot be done through the desktop client or mobile app.

Converting the virtual health visit to a meeting

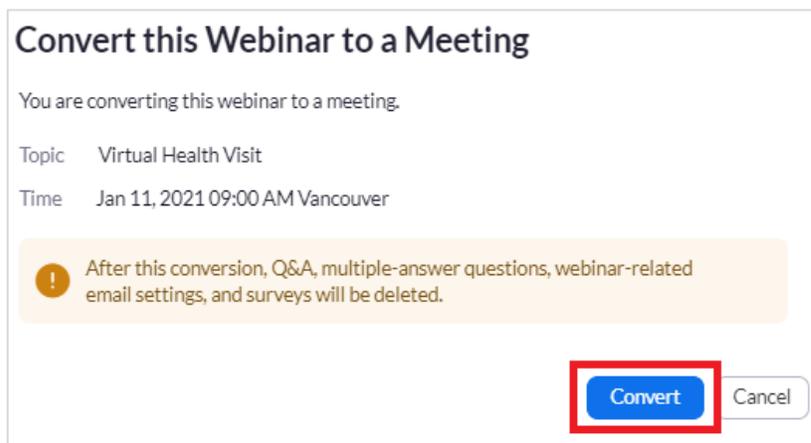
1. Sign into your Zoom for Healthcare account on the web browser - <https://zoom.us/>
2. Click **Webinars** in the left-hand panel.
3. Click the **name of the webinar** you want to convert.



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

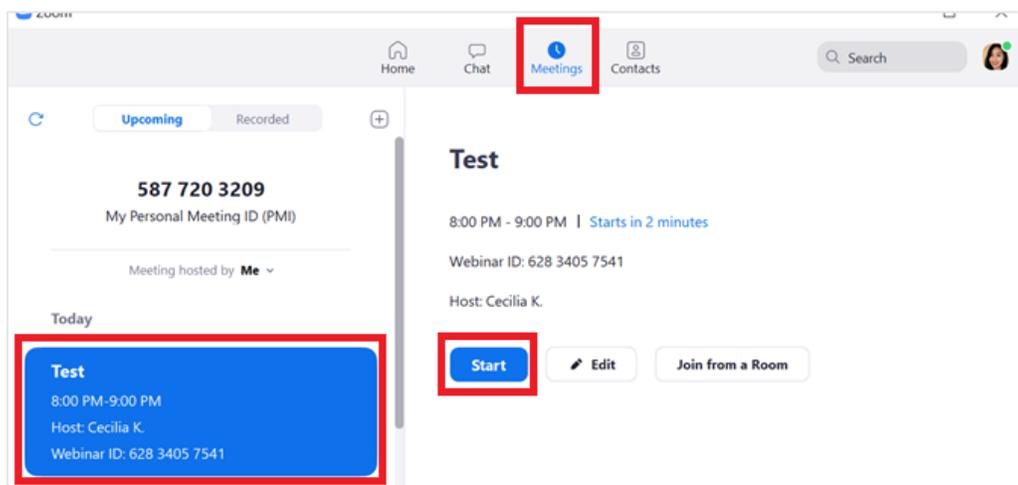
- Use the **Zoom desktop application** to host webinars.
- Do not use the web browser to conduct webinars as visit quality may not be optimal.
- Review the [webside manner and etiquette](#) for virtual health visits.
- See [Appendix 5](#) to review an infographic on assistance managing virtual health 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

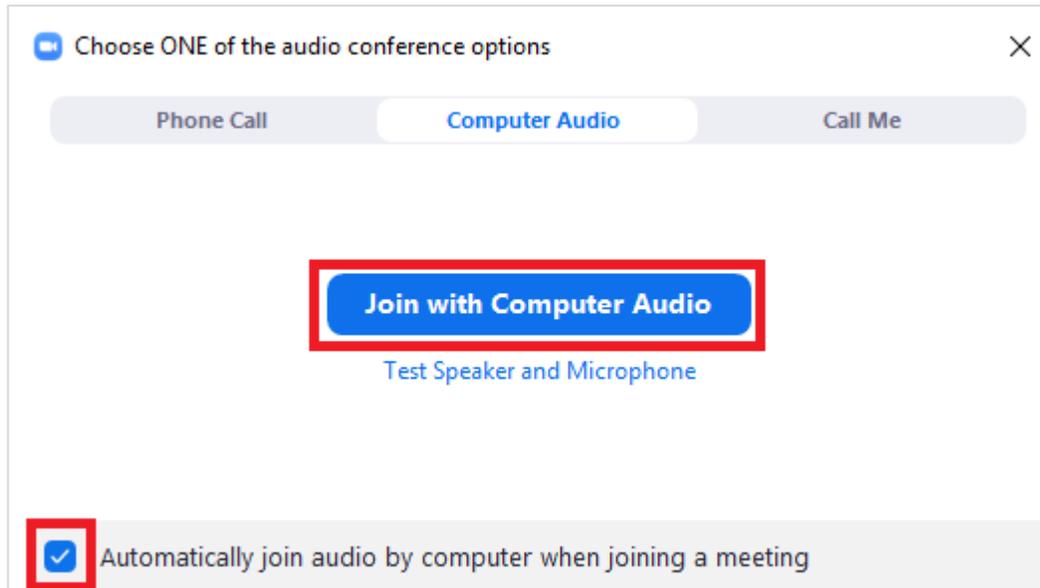
1. Open the Zoom **desktop application** and sign into your Zoom for Virtual Health Visits account.
2. Click **Meetings**.
3. Click the name of the webinar you wish to start.
4. Click **Start**.



Providing support for Zoom for Healthcare to:



5. Select to **Join with Computer Audio** if you have a microphone and speaker connected. We recommend using a headset.
 - A. 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.

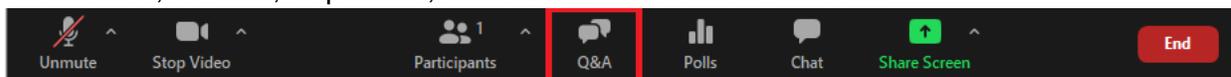
For best privacy and security practices, it is recommended that questions be submitted anonymously and chat is limited to between attendees and panelists only, not between attendees.

Requirements

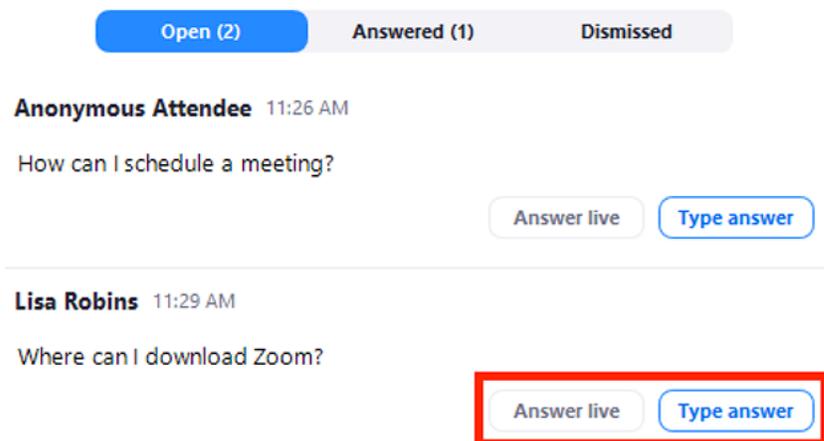
- Q&A is enabled for the webinar under **Webinar Options**. See [Set Up Q&A](#).
- Option for **anonymous questions** should be enabled. See [Set Up Q&A](#).

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.

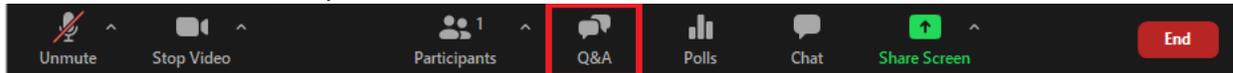


3. Click **Answer Live** to answer the question out loud during the webinar.
4. Click **Type Answer** to type out your answer for the attendee.

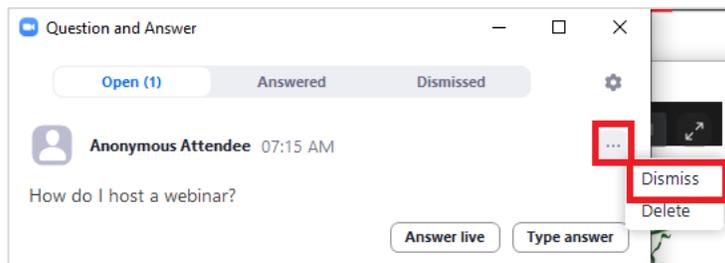


Dismissing and reopening questions

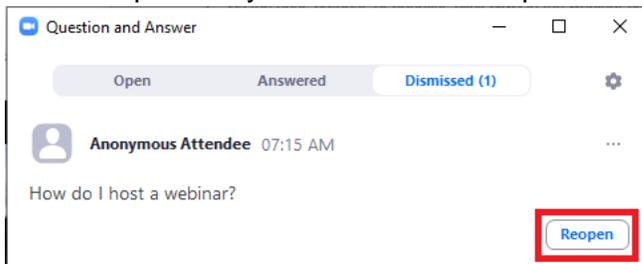
1. As the host, co-host, or panelist, click Q&A in the webinar controls.



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



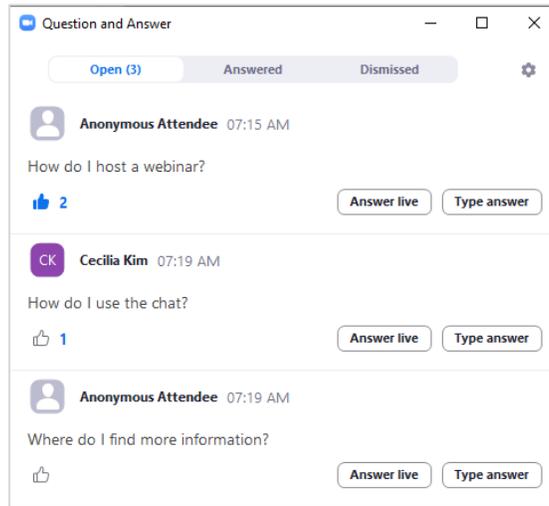
3. To reopen a dismissed question, click the **Dismissed** tab in the Q&A section of webinar controls.
4. Find the question you would like to reopen and click **Reopen**.





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.



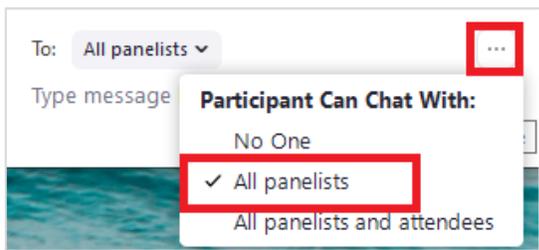
Chat

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

Purpose

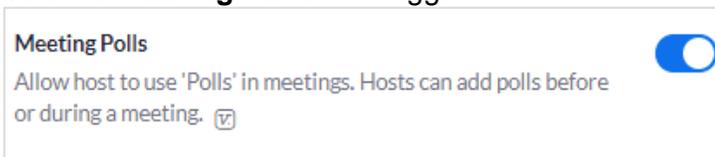
Polling allows you to create various question types for your virtual health visit. During the virtual health visit, you will be able to start the poll and gather the responses from your participants. Polls can be conducted anonymously if you do not wish to collect participant information. You can also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

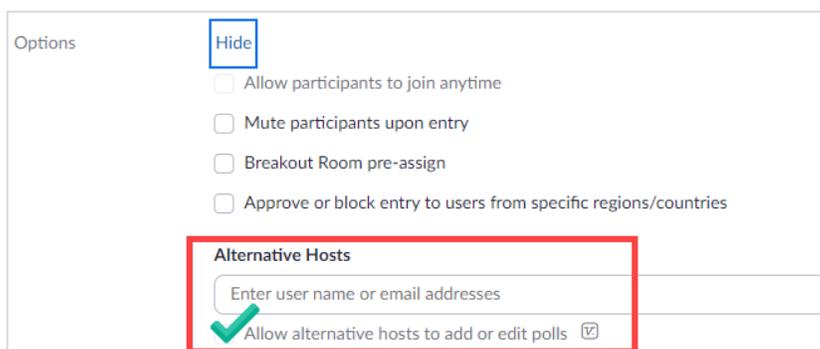
Note: Please refer to [PHSA's guidelines around surveys & privacy](#) prior to initiating any polls or surveys that may request personal information.

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.'

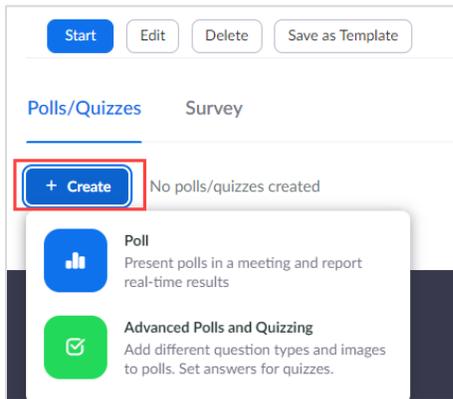


- When scheduling the virtual health visit, under **Options** (web) or **Advanced Options** (desktop client), check the box to **Allow alternative hosts to add or edit polls**.



Creating a poll in advance of the virtual health visit

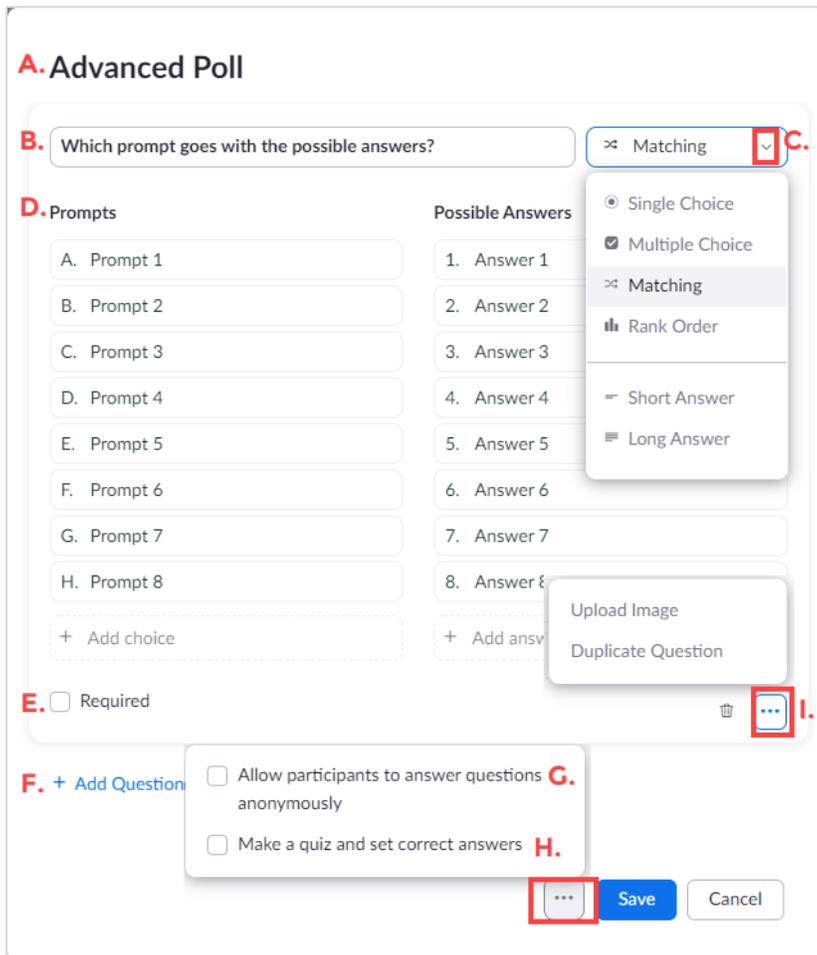
1. Follow [steps 1-5](#) to schedule the virtual health visit.
2. Scroll down to the **Poll** section.
3. Click **Create** and choose from **Poll** or **Advanced Polls and Quizzing**:



A. **Poll:** Single or multiple choice questions that participants can answer anonymously.

B. **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.



A. Poll title

B. Poll question

C. Question type

D. Answer options

E. Option to set required question

F. Option to add a question

G. Option to allow participants to answer questions anonymously

H. Option to make a quiz and set correct answers (*Advanced*)

I. Option to upload images and/or duplicate questions

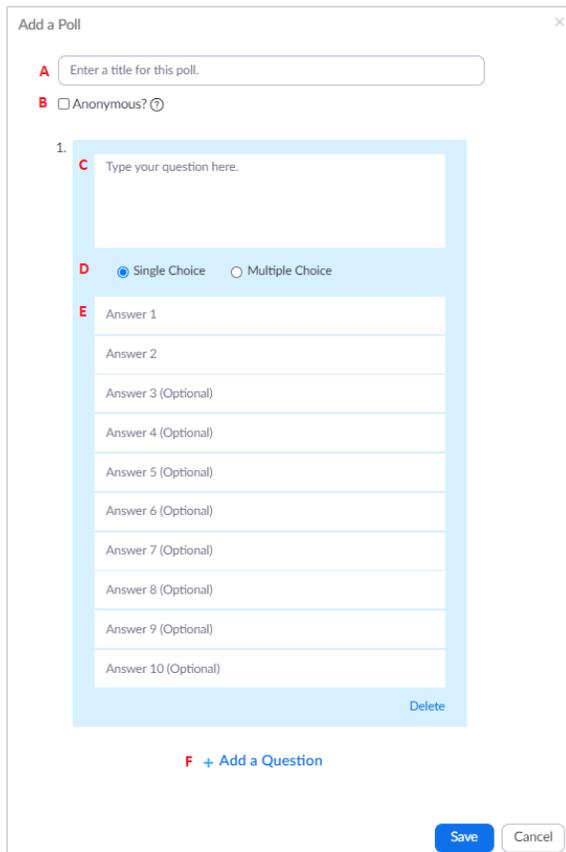
5. Click **Save** to save your poll questions and answers.

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.



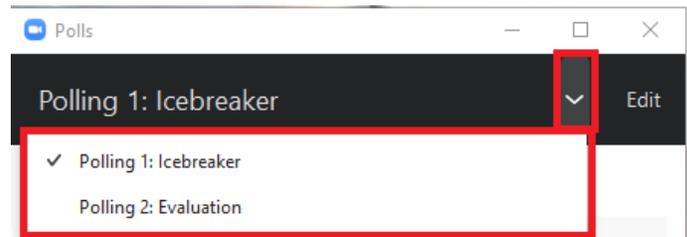
- A.** Poll title
- B.** Option to make poll anonymous
- C.** Poll question
- D.** Allow participants to select one answer or multiple answers
- E.** Answer options
- F.** Option to add additional questions

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

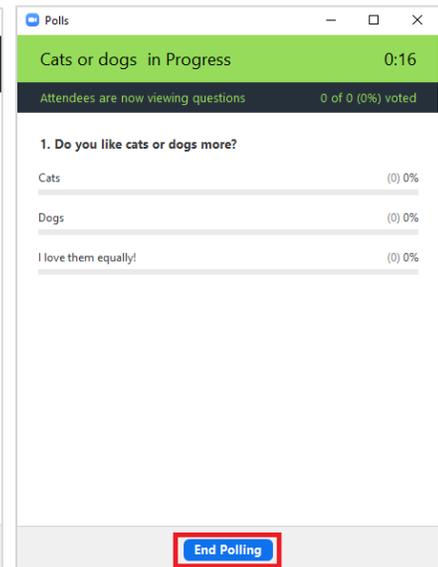
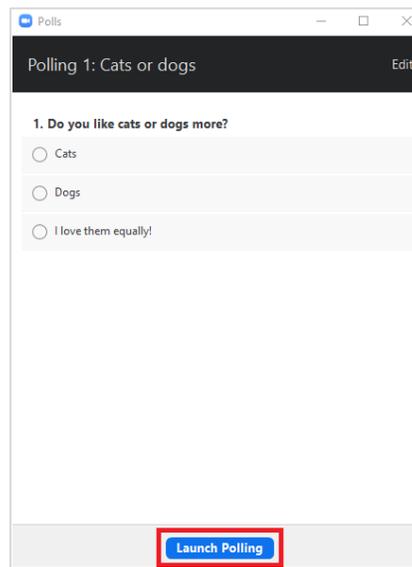


Starting and ending a poll

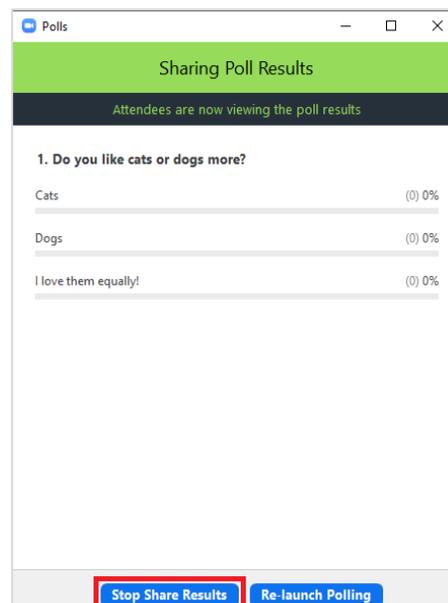
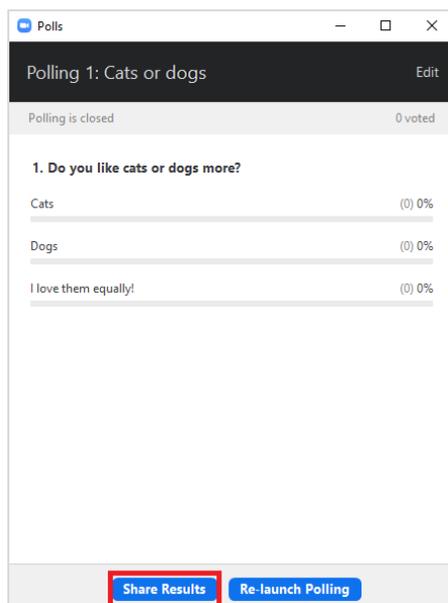
1. **Start** the virtual health visit.
2. **Admit participants** from the waiting room.
3. From the toolbar, click **Polls**.
4. If you have more than one poll question, select the poll you want to start.



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.

4. Change the Report Type to **Poll 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 poll results for.

<input type="checkbox"/>	11/04/2020 03:00:00 PM	11/04/2020 03:43:48 PM	Virtual Health Visit	652 7391 2511	3	Generate
--------------------------	------------------------	------------------------	----------------------	---------------	---	-----------------

8. The report will enter the **Report Queue**.
9. When the download is ready, click **Download**. A .csv file will download.

Report Type	Scheduled Time	Start Time	Topic	Meeting ID	Generate Time	
Poll Report	Nov 4, 2020 03:00:00 PM	Nov 4, 2020 03:43:48 PM	Virtual Health Visit	652 7391 2511	Nov 5, 2020 12:59:25 PM	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.

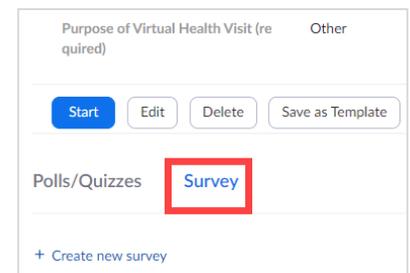
Note: Please refer to [PHSA's guidelines around surveys & privacy](#) prior to initiating any polls or surveys that may request personal information.

Requirements

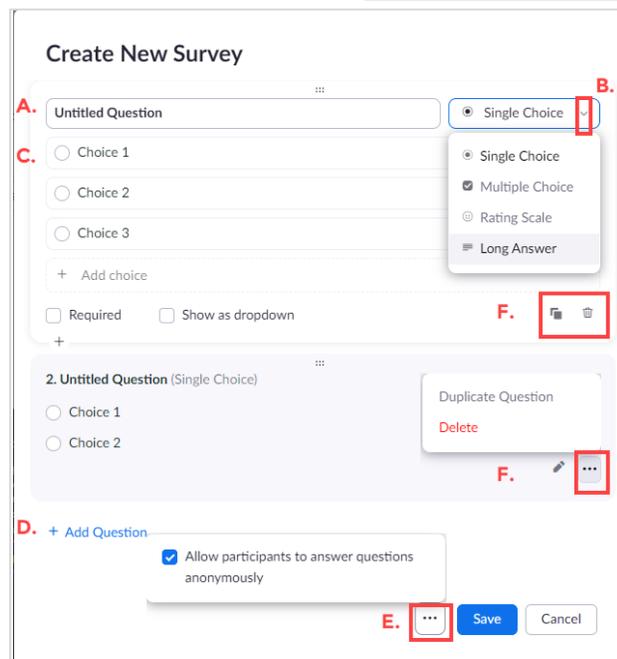
- Use the **web browser** version of Zoom to schedule and create surveys in advance.

Creating a poll in advance of the virtual health visit

- Follow [steps 1-5](#) to schedule the virtual health visit.
- Scroll down to the bottom of the page and click **Survey**.
- Click **+ Create new survey**.
- Create your survey questions and answers. Question types can include single choice, multiple choice, rating scale, or long answer.



- Survey question
- Select question type
- Question responses
- Option to add a question
- Option to allow participants to answer anonymously
- Option to duplicate or delete a question



- Click **Save**.
- 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/>
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.

<input type="checkbox"/>	11/04/2020 03:00:00 PM	11/04/2020 03:43:48 PM	Virtual Health Visit	652 7391 2511	3	Generate
--------------------------	------------------------	------------------------	----------------------	---------------	---	-----------------

8. The report will enter the **Report Queue**.
9. When the download is ready, click **Download**. A .csv file will download.

Report Type	Scheduled Time	Start Time	Topic	Meeting ID	Generate Time	
Poll Report	Nov 4, 2020 03:00:00 PM	Nov 4, 2020 03:43:48 PM	Virtual Health Visit	652 7391 2511	Nov 5, 2020 12:59:25 PM	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

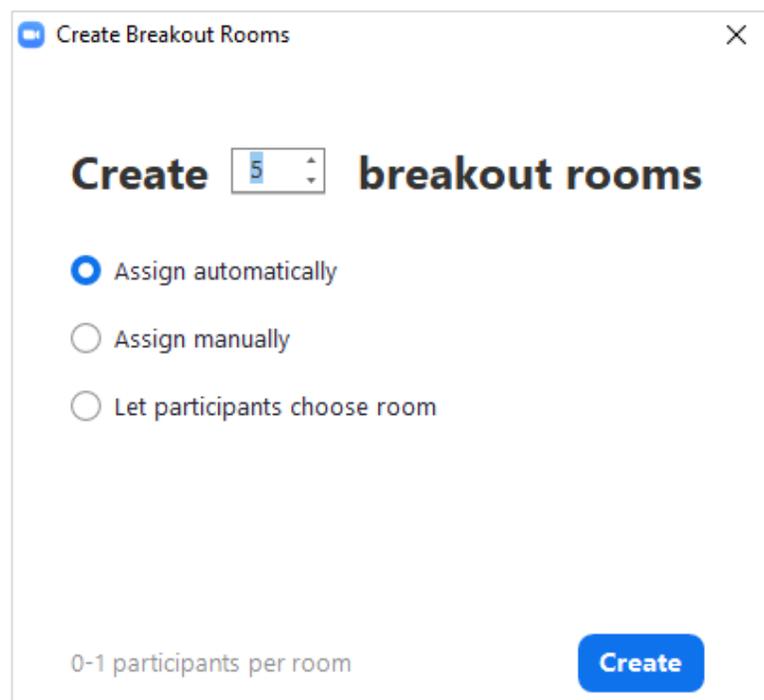
- Use the Zoom desktop application to host the group virtual health visit.
- If letting participants choose their breakout room, both the meeting host and participants need to be on desktop client version 5.3.0 or later.
- Breakout room function is enabled:
 - Sign into your Zoom for Virtual Health Visits 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:

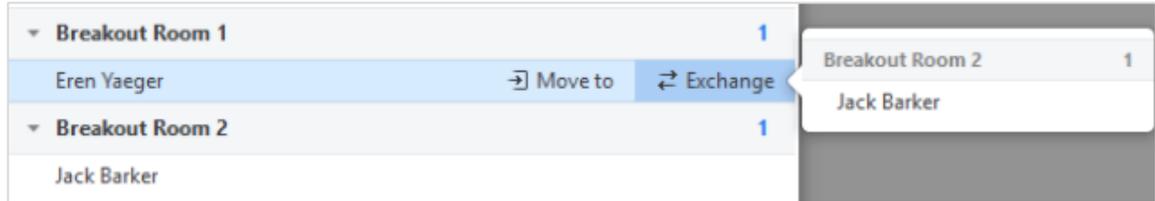
- From the toolbar, click **Breakout Rooms**.
- Enter the **number of breakout rooms** you want to create.
- Choose to assign participants **automatically, manually, or let participants choose*** their breakout room.
- Click **Create**.



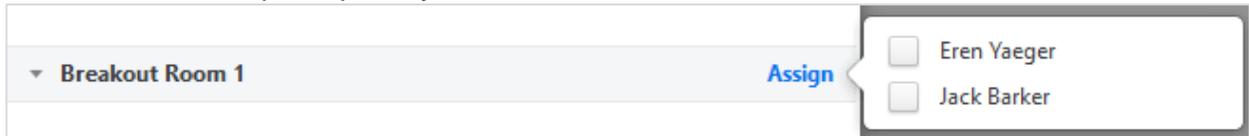
Providing support for Zoom for Healthcare to:



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**.

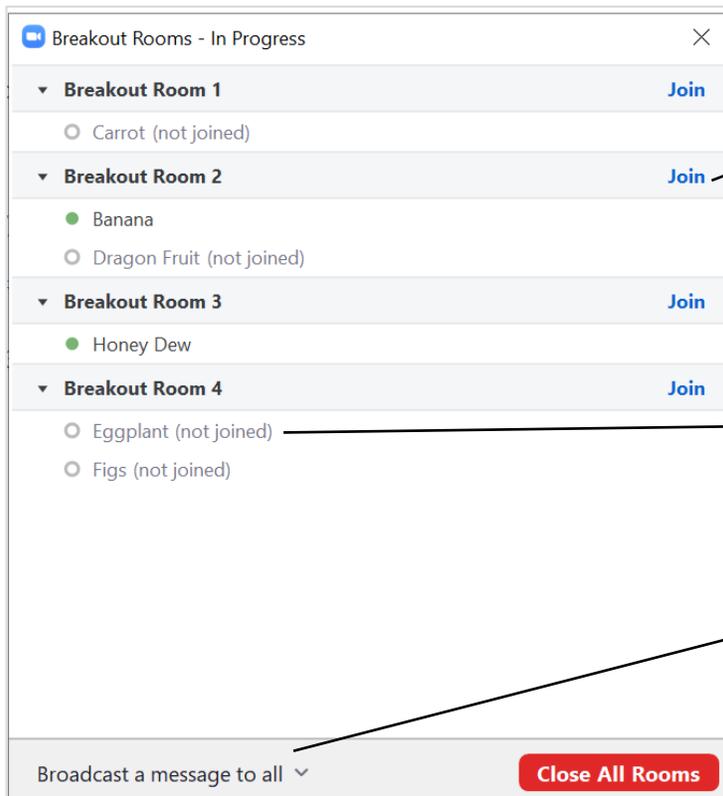


If you chose to **manually assign participants**, click **Assign** next to the breakout room and tick the box next to the participants you want in the room.



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**.



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

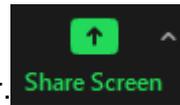
With Zoom, share your screen, desktop or other content during a virtual health visit to your participants even while your video is on.

Requirements

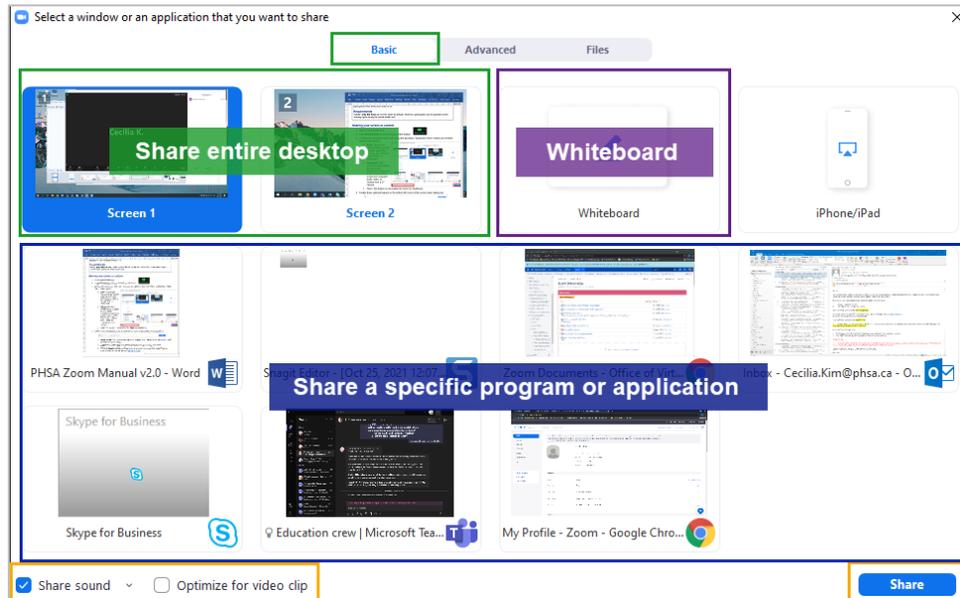
Initially, **only the host** can screen share by default. However, participants can be granted screen sharing rights during the virtual health visit.

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:

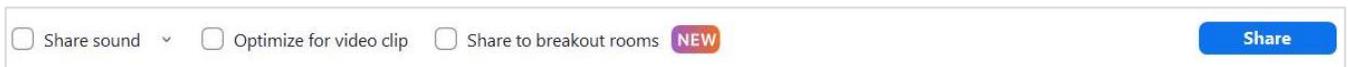


- **Basic:** Share your desktop, specific program application windows (e.g. Word or PowerPoint), or whiteboard.
- **Advanced:** Use a slideshow presentation as your virtual background, share just a part of your screen, or just your computer audio, video, or content from a 2nd camera.



- *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](#).

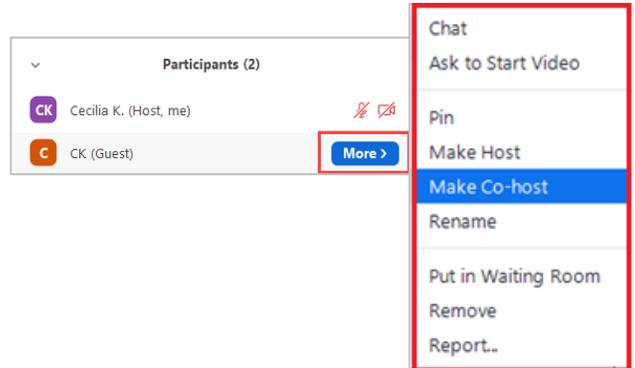
5. Click  .



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**.

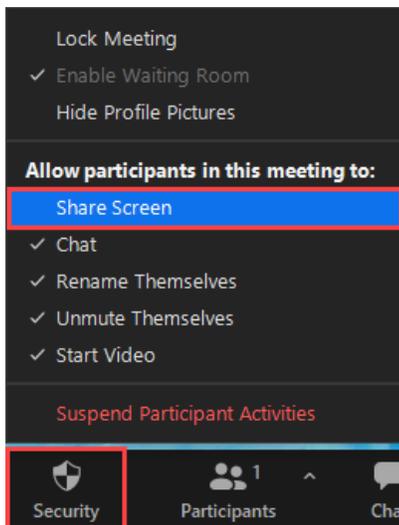


If you want **all participants** to have the ability to screen share, you can change sharing rights during the virtual health visit:

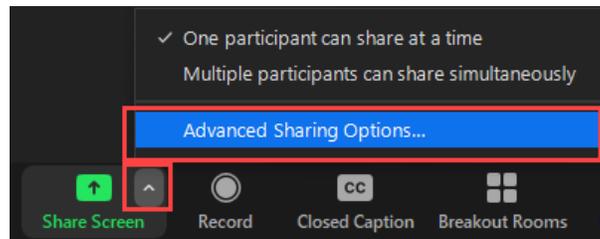
- A. Click on **Security** on your meeting control toolbar and check **Share Screen**;

OR

- B. Click on the  arrow beside **Share Screen** on your meeting toolbar and click **Advanced Sharing Options** to access additional settings.



OR



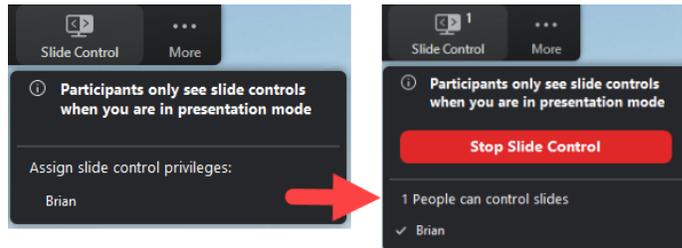
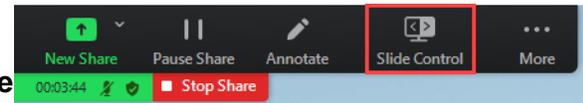


Allow other participants to control slides

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.

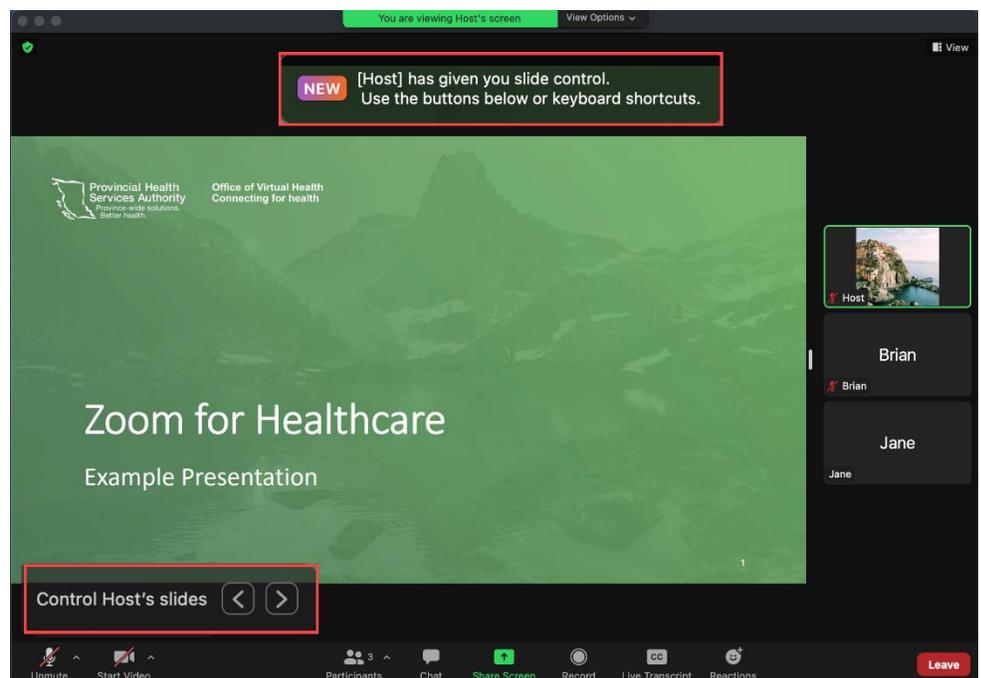


5. The participant(s) will now be able to control your slides. They will retain slide control as long as you continue sharing.

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.



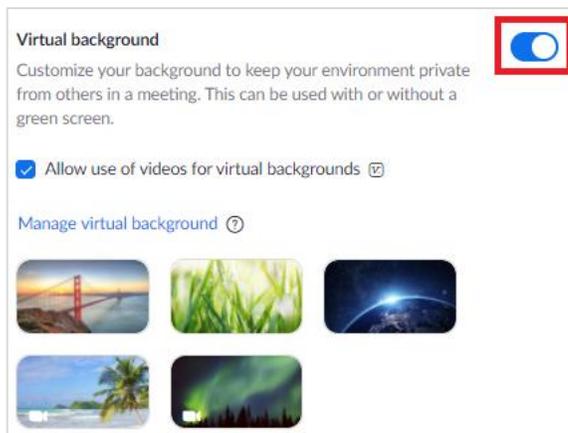
Setting up a virtual background for the desktop application

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'.

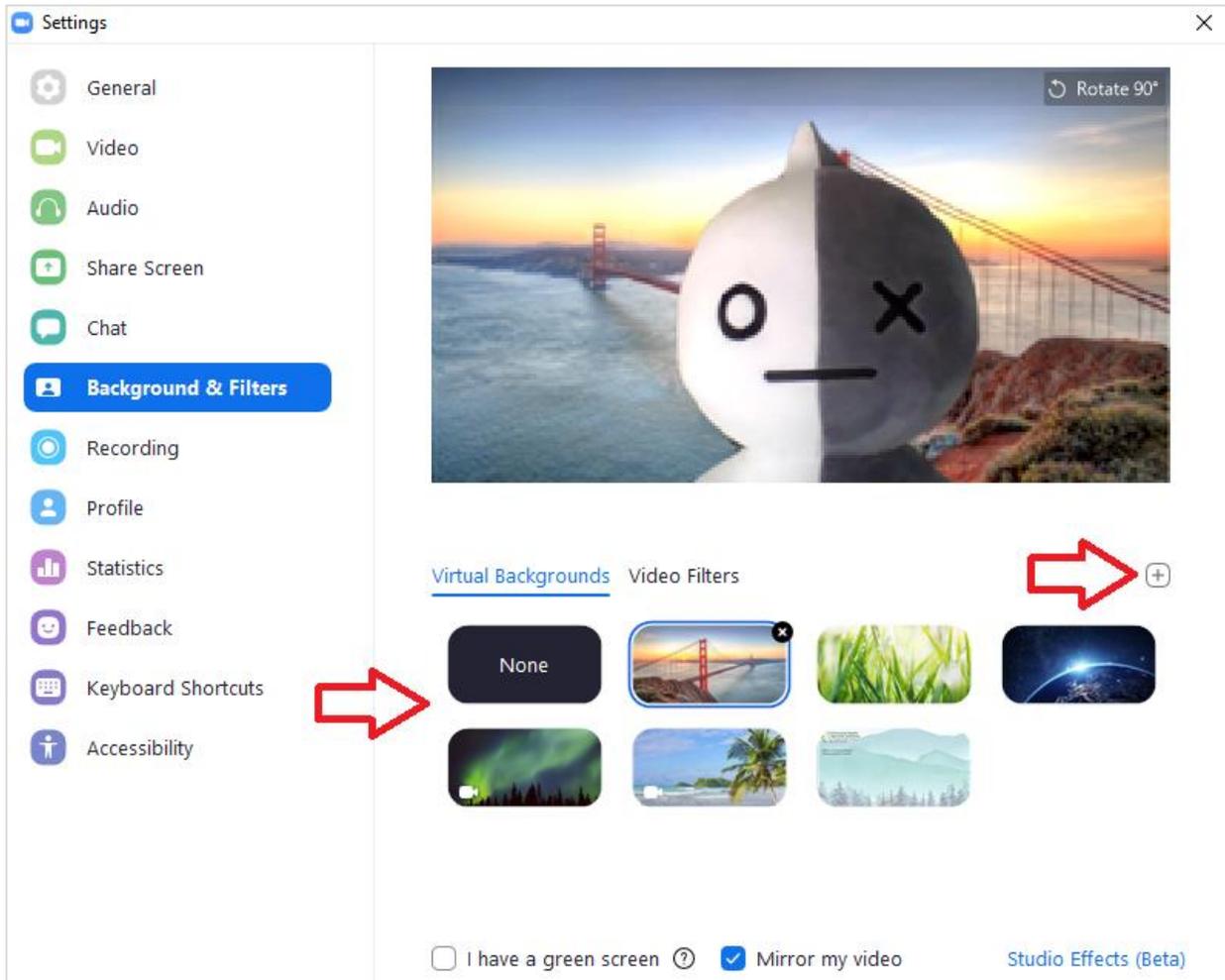


Choosing a virtual background for virtual health visits

1. Sign in to the Zoom desktop application
6. In the top right corner, click **Settings (the gear icon)**.
7. Click **Background & Filters**.



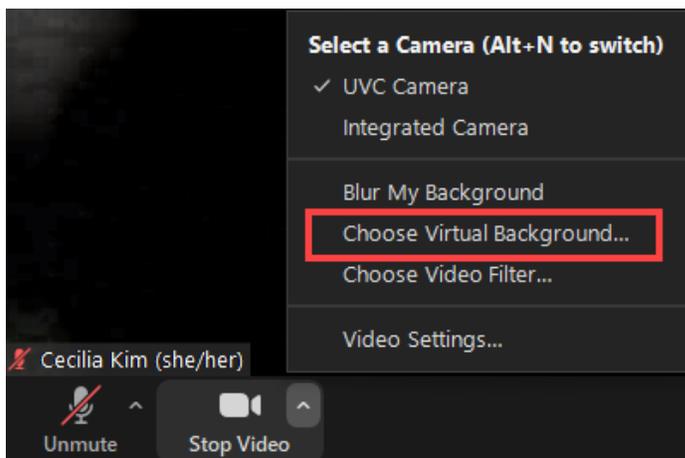
8. Select one of the available backgrounds or add your own image or video background by clicking '+'.



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.



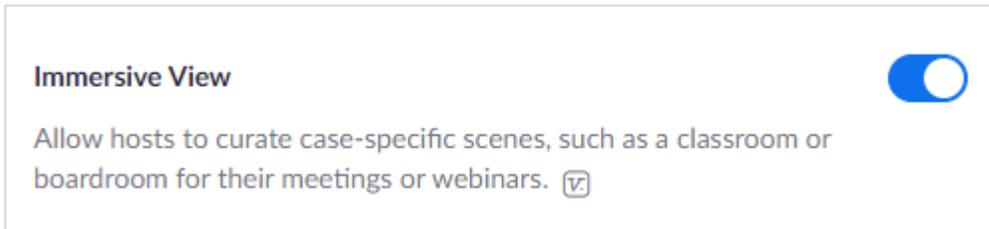
Using Immersive View

Purpose

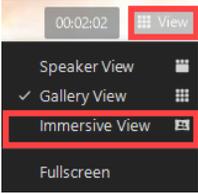
- Immersive View allows hosts to arrange video participants and webinar panelists into a single virtual background, bringing people together into one scene to connect and collaborate in a cohesive virtual meeting space.

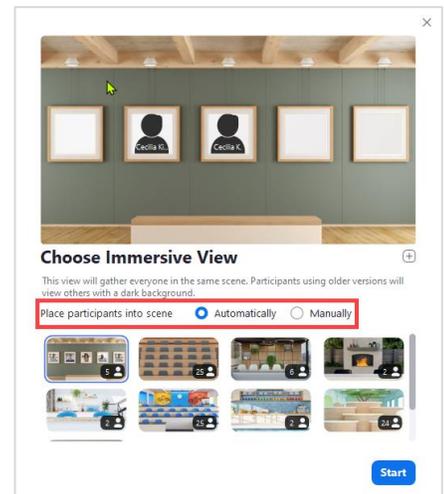
Requirements

- Immersive View** needs to be enabled for your account.
 - 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.
 - Click **Settings** and scroll to the **In Meeting (Advanced)** section.
 - Scroll to **Immersive View** and toggle to 'on'.



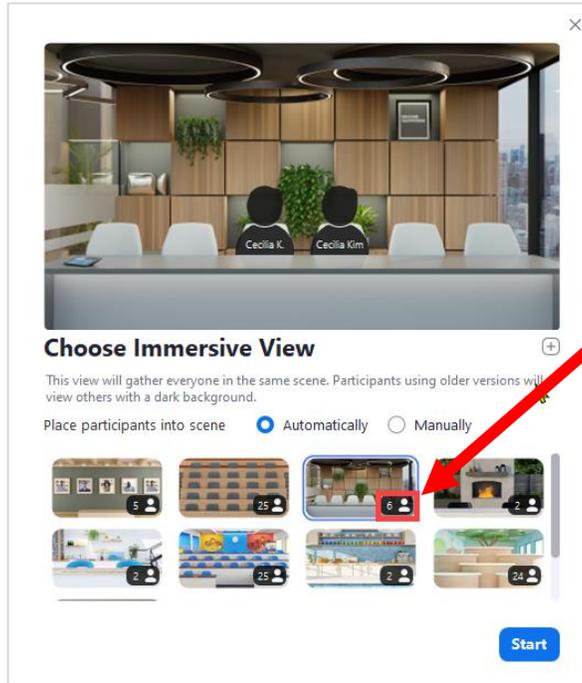
Starting Immersive View for virtual health visits

- Start a virtual health visit or webinar as the host.
- In the top-right corner, click **View**.
- Click **Immersive View**.
 
- Select one of the following options for placing participants into the scene:
 - Automatically:** This will include as many participants as is possible in the scene you select.
 - Manually:** You will add or remove participants as you wish.





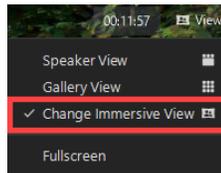
5. Select the scene you would like to use. Each scene designates the max number of predefined places for attendees in the bottom right corner.



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

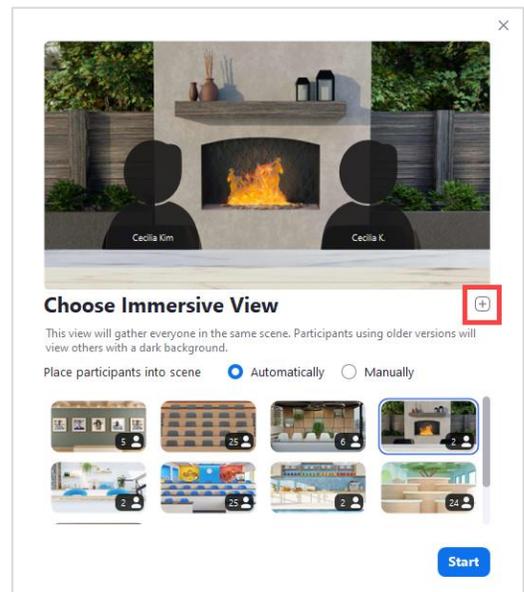
Use a custom Immersive View

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.

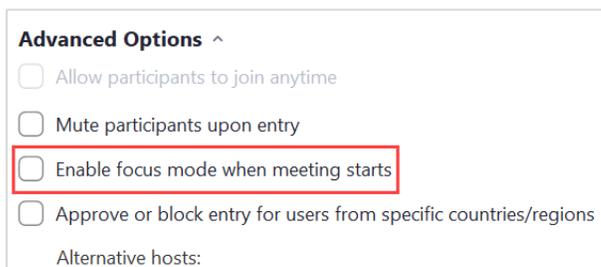
Using Focus Mode

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.



Advanced Options ^

Allow participants to join anytime

Mute participants upon entry

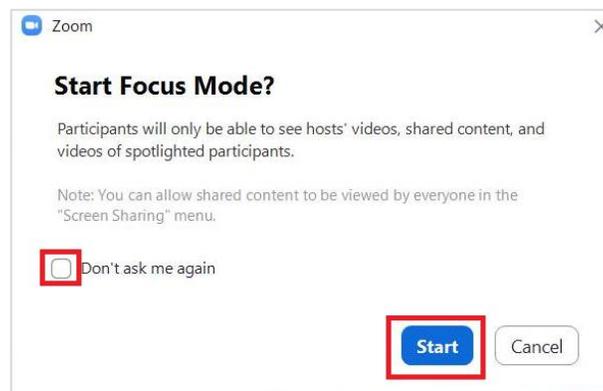
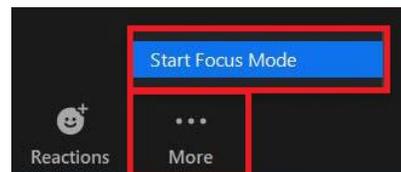
Enable focus mode when meeting starts

Approve or block entry for users from specific countries/regions

Alternative hosts:

Using Focus Mode in a virtual health visit

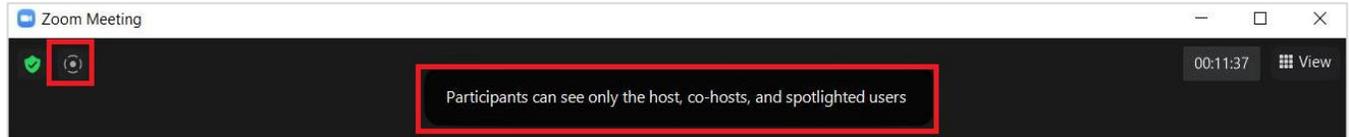
- Start a virtual health visit or webinar as the host.
- Click **More** on the meeting toolbar.
- Click **Start Focus Mode**.
- On the dialog box that appears, click **Start** to confirm, or select the **Don't ask me again** checkbox to skip this confirmation going forward.



Providing support for Zoom for Healthcare to:



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.

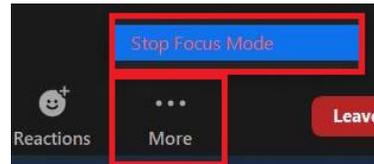


Note: Participants' shared screens are initially only visible to the host and co-hosts in Focus mode. Change the settings below to allow all other participants to view as well:

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**.



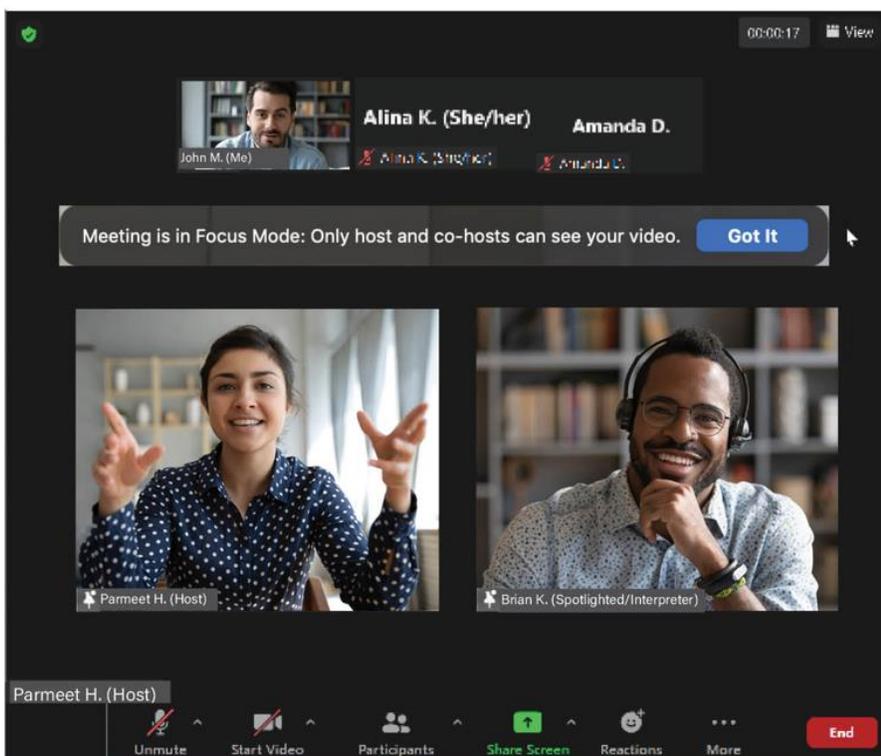


Focus Mode Examples

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

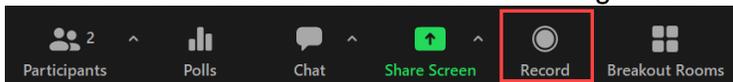
Zoom for Healthcare has a feature that allows approved users to create an audio and video recording of a webinar or meeting. Recordings will be automatically saved to the cloud and saved for 1 year, during which time they may be shared with others and/or downloaded to the host's local device.

Requirements

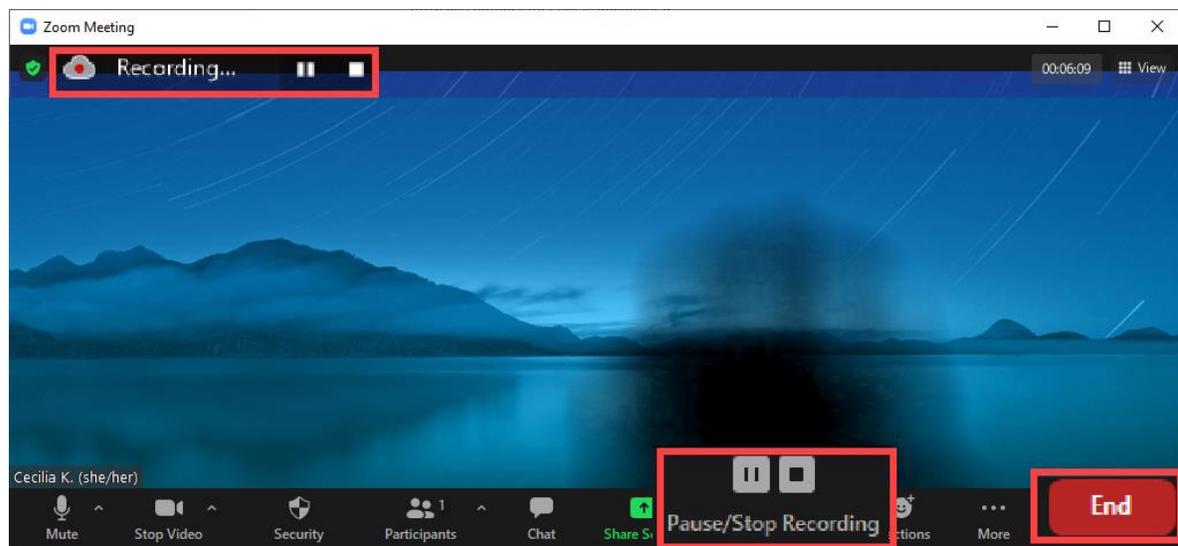
- The purpose for recording **must** meet one of the permitted scenarios outlined in this [decision support tool](#).
- Once reviewing the above, Zoom cloud recording functionality [can be requested](#) for your Zoom for Healthcare account.

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.

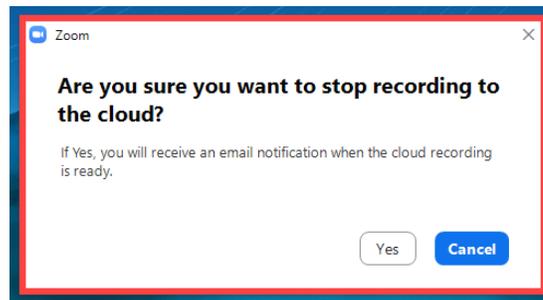


3. A [notification](#) pop-up will appear on participants' Zoom windows to inform them about the potential risks and considerations associated with any cloud-based recording.
4. To stop recording, click **Pause, Stop Recording, or End Meeting**.





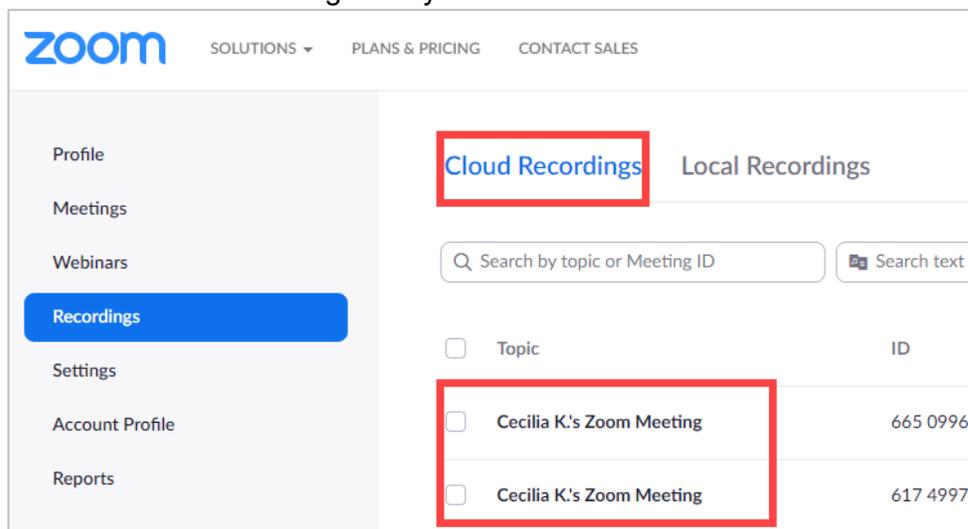
- Once the recording has been fully stopped, a dialog box will appear asking you for confirmation:



- 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

- Sign in to zoom.us
- 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.



- 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.

The screenshot shows the Zoom Cloud Recordings interface. On the left, there is a sidebar with 'Cloud Recordings' and 'Local' tabs. Below them is a search bar and a list of recordings. The main area shows a table of recordings with columns for Start Time, File Size, and Auto Delete In. A 'Jane Doe's Zoom Meeting' recording is selected. A 'Share' button and a three-dot menu are highlighted with red boxes. A modal window titled 'Share recording - Jane Doe's Zoom Meeting' is open, showing a 'Shareable Link', a 'Passcode', and options for 'Who can view' and 'Share with specific people'. A 'Share Settings' button is also highlighted.

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.

- 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

The screenshot shows the Zoom Recordings details page for 'Jane Doe's Zoom Meeting'. The page includes a sidebar with navigation options like Profile, Meetings, Webinars, Personal Contacts, Recordings, Settings, Account Profile, and Reports. The main content area shows the recording details, including the date, time, and location. A 'Share' button is highlighted with a red box and an arrow pointing to it, with the text 'Share link to recording; access additional sharing settings'. Below this, there is a 'Recording 1' section with a play button icon and a '01:15' duration. A 'Download' button and a 'Copy shareable link' button are highlighted with red boxes and arrows, with the text 'Download or delete all files'. Below this, there is a list of files included in the recording, such as 'Shared screen with speaker view', 'Shared screen with gallery view', 'Speaker view', 'Gallery view', 'Shared screen', and 'Audio only'. The 'Speaker view' file is highlighted with a red box and an arrow, with the text 'Select the recording playback file format'. Below this, there is a 'Download, share or delete selected file formats' button highlighted with a red box and an arrow.

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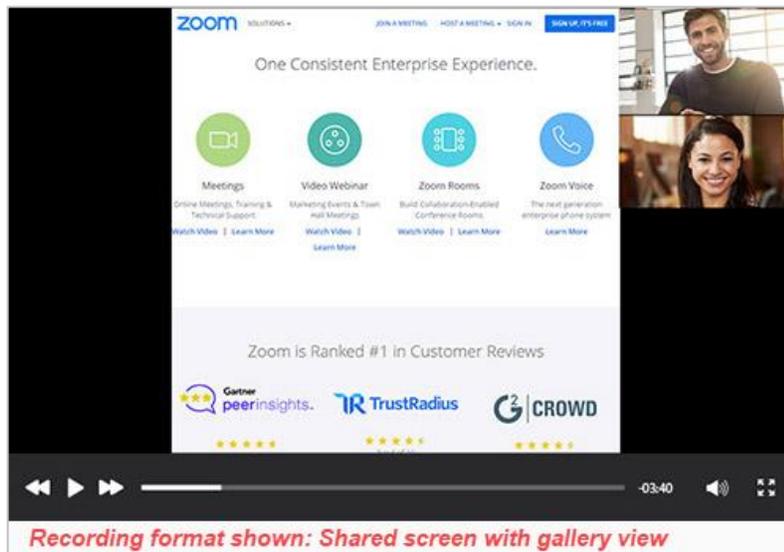
6. Choose the [recording file layout\(s\)](#) you want to download:

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.

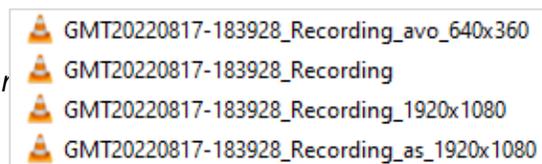
f. **Audio only:** Plays the audio of the video only. Download will be an M4A file of the audio.

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-HHMMSS_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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Accessibility Glossary

Term	Definition
American Sign Language (ASL)	ASL is a visual language used primarily by the Deaf, Deaf-Blind and Hard of Hearing communities in parts of Canada. It utilizes hand gestures, facial expressions, and body movements to convey meaning, with its own grammar and syntax distinct from spoken English.
Bi-directional interpretation	Interpretation between two languages where each one functions as both a source and target language.
Closed Captioning (CC)	Closed Captioning (CC) refers to the text-based transcription of audio content that is synchronized with video, providing accessibility to those who are Deaf, Deaf-Blind or Hard of Hearing.
Communication Access Real-Time Translation (CART)	A Real-time speech-to-text translation of all spoken words and environmental sounds by a trained CART stenographer. Unlike other forms of captioning, CART aims to capture all sounds and allow the user to decide what information is important to them.
Deaf	"Deaf" typically refers to individuals who identify with the Deaf community and culture, often using sign language (such as ASL or LSQ) as their primary mode of communication. This term embraces not only a hearing loss condition but also a cultural identity, with many Deaf individuals participating in a vibrant, distinct linguistic and social community.
Deaf-Blind	Deaf-Blind refers to individuals who have a dual sensory impairment, affecting both hearing and vision, to the extent that it significantly limits communication, mobility, and access to information. Support services often include specialized communication methods and assistive technology to enable independence and inclusion.
Hard of Hearing	Hard of Hearing typically refers to individuals who have partial hearing loss, which can range from mild to severe, but who are not completely deaf. They may rely on hearing aids, assistive devices, or lip reading to communicate effectively, but often still have some degree of auditory perception.
Hearing impaired	This term is not acceptable in referring to people with a hearing loss. It should never be used in referring to Deaf, Deaf-Blind or Hard of Hearing people. "Hearing impaired" is a medical condition; it is not a collective noun for people who have varying degrees of hearing loss. It fails to recognize the differences between the Deaf, Deaf-Blind and the Hard of Hearing communities.
Interpretation	Enabling communication between individuals who speak/sign different languages, ensuring the accurate transmission of the message from its original language to the desired target language. This may be orally, using sign language, or written word.
Sign Language	Sign language in Canada primarily refers to two systems: American Sign Language (ASL), which is widely used by the English-speaking Deaf community, and Langue des Signes Québécoise (LSQ), used predominantly in French-speaking regions like Quebec. These visual languages are distinct from spoken languages and have their own grammar, syntax, and vocabulary.
Simultaneous interpretation for Spoken Language	When the interpreter renders the speaker's verbal meaning in one language to another spoken language in real-time. In a nutshell, the interpreter speaks at the same time as the original speaker. This is set up in Zoom in a specific way to create different auditory 'language channels' that participants can select to hear their preferred spoken language.
Spoken Language	A language produced by articulate sounds. Examples of spoken languages include: English, Spanish, French, Gujarati, Mandarin, etc..

Enabling Language Interpretation in your Zoom account

Purpose

To use language interpretation in a virtual health visit, the setting(s) must be enabled in the host's account prior to scheduling the visit.

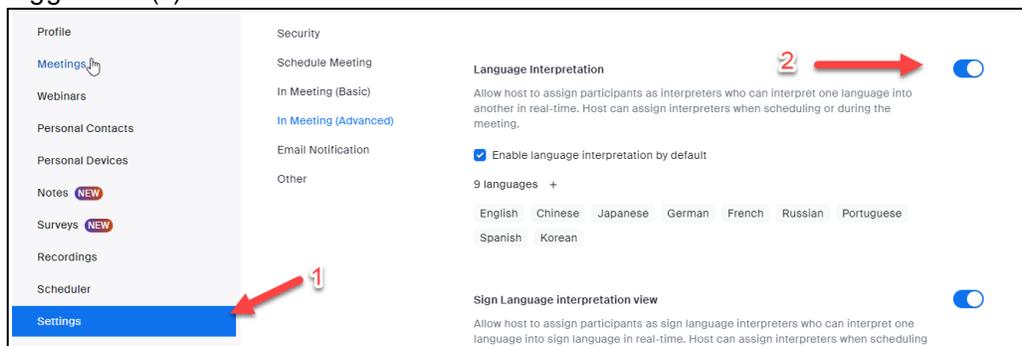
Requirements

- Must have access to the host's settings via Zoom web browser to enable this feature.

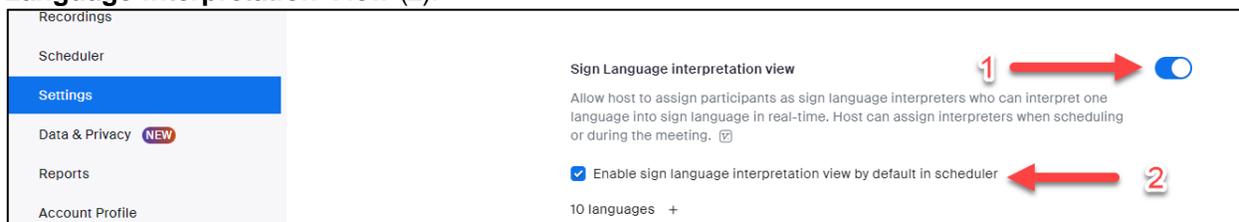


This functionality may already be enabled in your account, if not, follow the steps below to verify/update them.

- Log into **Zoom web portal on your browser** via SSO
- Click on **Settings** (1) on the left menu. Scroll down until you see Language Interpretation and ensure it is toggled on (2).



- If you have any attendees requiring American Sign Language (ASL) interpretation, scroll down to **Sign Language Interpretation view** and ensure that it is toggled on (1). Also check the box for enabling **Sign Language Interpretation View** (2).





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 Services \(PLS\)](#). You can review the different types of interpretation services via the Provincial Language Services [webpage](#). Both spoken language interpreters and sign language interpreters can be requested through this service.

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.
 - To avoid late cancellation fees, please update and/or cancel requests at least 48 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.

Requesting (booking) - For single patient virtual health visit

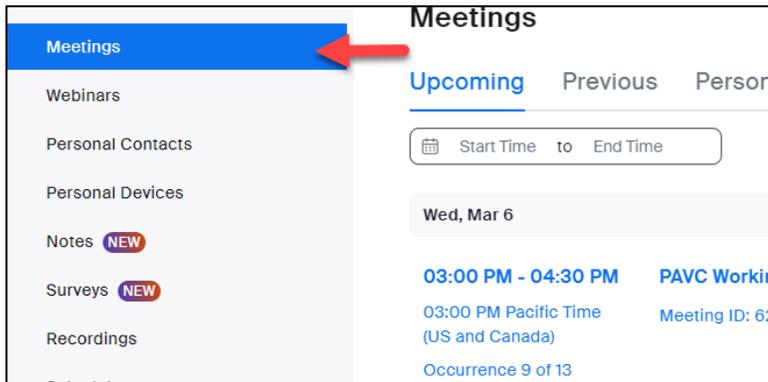
After scheduling the virtual health visit you can now move on to requesting (booking) a spoken and/or sign language interpreter. Follow these steps:

1. Log into Zoom web portal on your browser via SSO.

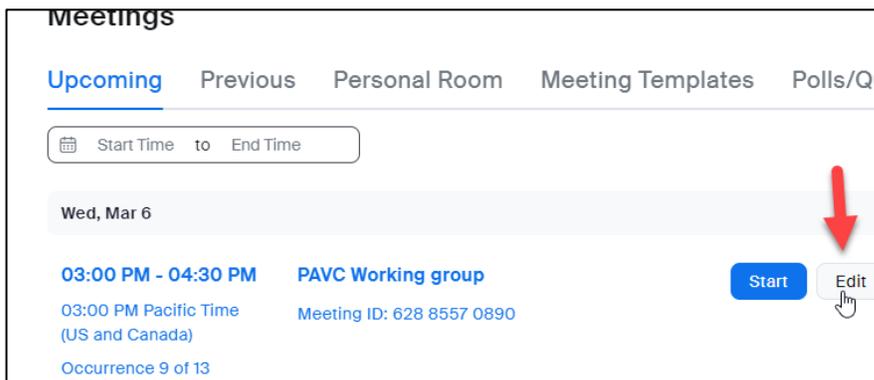
This functionality may already be enabled in your account, if not, follow the steps after this to verify/update them.



- 2. Go to upcoming meetings **by clicking on Meetings** in the left menu.



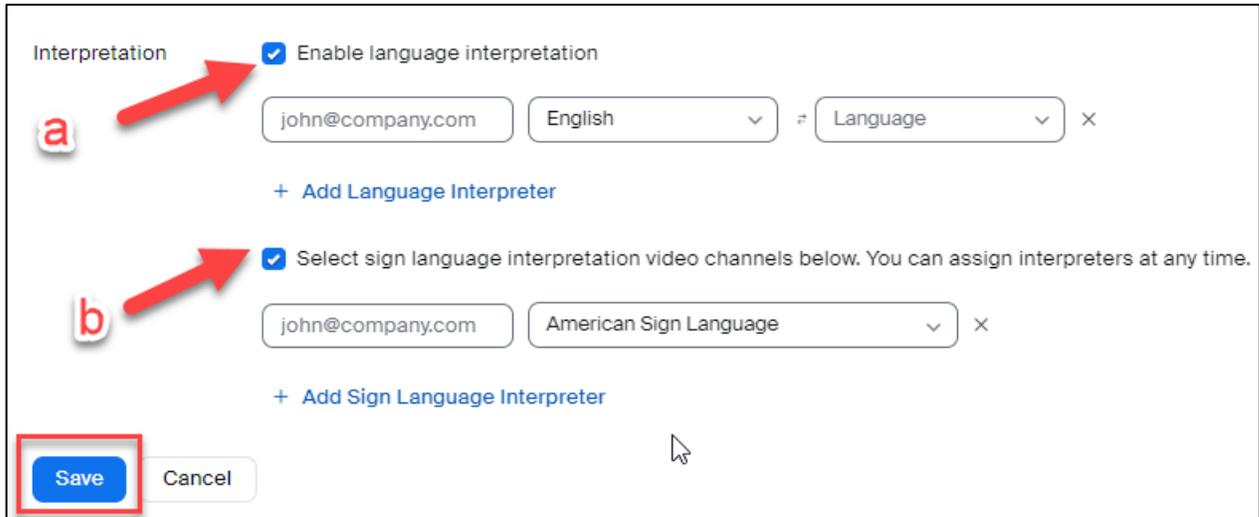
- 3. On the right-hand side of the meeting name click on **Edit**.



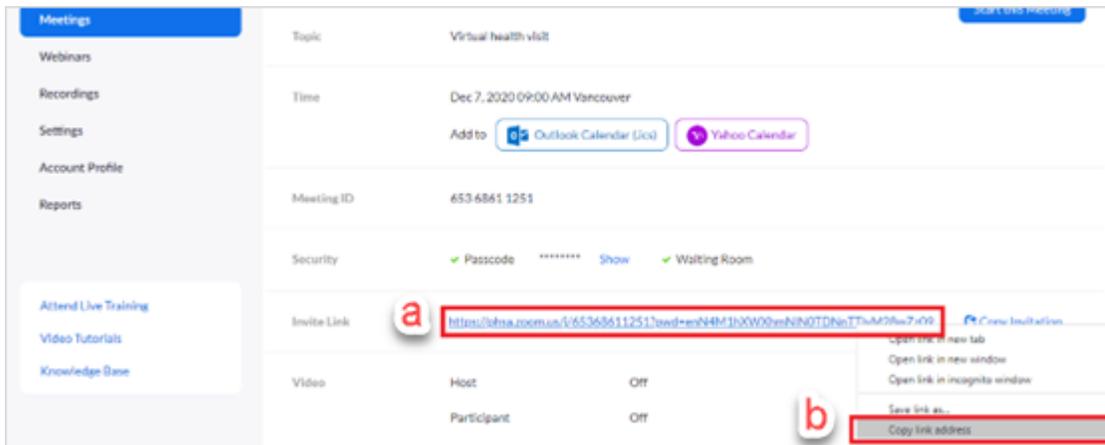
Providing support for Zoom for Healthcare to:



- In the Edit screen, scroll down until you see **Interpretation** section. For spoken language interpretation check the box **Enable language interpretation** (a). For sign language interpretation check the box **Select sign language interpretation video channel...** to enable sign language interpretation (b). Then click **Save**.



- Then, locate your scheduled Zoom virtual visit **Invite Link**. Right-click the virtual health visit URL (a). Click **Copy link address** (b).



- Then, access the PLS [Online Booking System](#).
- Login using your PLS account.
- Accept the Terms of Use.

Providing support for Zoom for Healthcare to:



9. Create a **New request**.



10. A pop-up window will appear, enter required and requested information paying special attention to the **Interpreting Session Information** section:

- a. Under the **Appointment Type** select **Virtual Visit**.
- b. Ensure to paste the Zoom virtual health visit meeting URL into the **Meeting Link** field.
- c. Under **Language** you can choose from a list of spoken languages, American Sign Language, as well as Communication Access Real-Time Translation (CART. Live captioning by a professional).
- d. If your appointment is scheduled for an exact time, change the **Flexible Time** to **No** and enter your exact appointment time.

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

Providing support for Zoom for Healthcare to:



Requesting (booking) - For group sessions

12. Follow steps 1 through 11 of [Requesting \(booking\) - For single patient virtual health visit](#) then continue with the steps below:
13. Under the **Patient Information** section select **Multiple Patients** and/or **Multiple Healthcare Professionals**.

PATIENT INFORMATION

Number of Patients Single Patient Multiple Patients Family Conference

Range 2 - 5 Patients 6 - 10 Patients 11 - 20 Patients > 20 Patients

PROFESSIONAL ATTENDING SESSION

Multiple Healthcare Professionals

Title/Job * Name Email

Phone Number Phone Ext Mobile Number

Fax

14. Under the **Purpose of the appointment** section select **Education/Group Session**.

*** PURPOSE OF APPOINTMENT**

<input type="checkbox"/> Assessment/Consultation	<input type="checkbox"/> Cognitive Assessment	<input type="checkbox"/> COVID Vaccination	<input type="checkbox"/> Diagnostic Test	<input checked="" type="checkbox"/> Education/Group Session
<input type="checkbox"/> Emotional	<input type="checkbox"/> End of Life Discussion	<input type="checkbox"/> Family Conference	<input type="checkbox"/> Follow Up	<input type="checkbox"/> MAiD - Action
<input type="checkbox"/> MAiD - Assessment	<input type="checkbox"/> MAiD - Information	<input type="checkbox"/> MAiD - Patient Documentation	<input type="checkbox"/> Medical/Surgical Procedure	<input type="checkbox"/> Medication Review
<input type="checkbox"/> Palliative Care	<input type="checkbox"/> Pre-Admin/Admitting	<input type="checkbox"/> Pre-Surgery Prep Required	<input type="checkbox"/> Rehabilitation	<input type="checkbox"/> Serious Illness Conversatic
<input type="checkbox"/> Therapy/Treatment	<input type="checkbox"/> Treatment Plan/Review	<input type="checkbox"/> Client Meeting	<input type="checkbox"/> Document Review	<input type="checkbox"/> Interview
<input type="checkbox"/> Legal Hearing/Inquest				
<input type="checkbox"/> Other Purpose				

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



Requesting (booking) - For simultaneous interpreter

Purpose

To book an interpreter who can render the speaker's verbal meaning in one language to another spoken language in real-time. In a nutshell, the interpreter speaks at the same time as the original speaker. This can be for single patient or group patient virtual health visits.

Requirements

A request must already be submitted to Provincial Language Services (PLS) via their online portal for either a [single patient](#) or [group patient](#) virtual health visit. You will need your reference number from the PLS request in order to process the following steps.

1. After completing the PLS online request form send an email to plscsr@phsa.ca. Include the following information:
 - a. Request reference number (from your PLS request)
 - b. That you require a simultaneous interpreter



After the request is processed, a note will be added to your PLS request and the simultaneous interpreter will be booked on your behalf. If this is not possible you will be contacted via email.

During – Hosting an American Sign Language Interpreter for single patient virtual health visits

Purpose

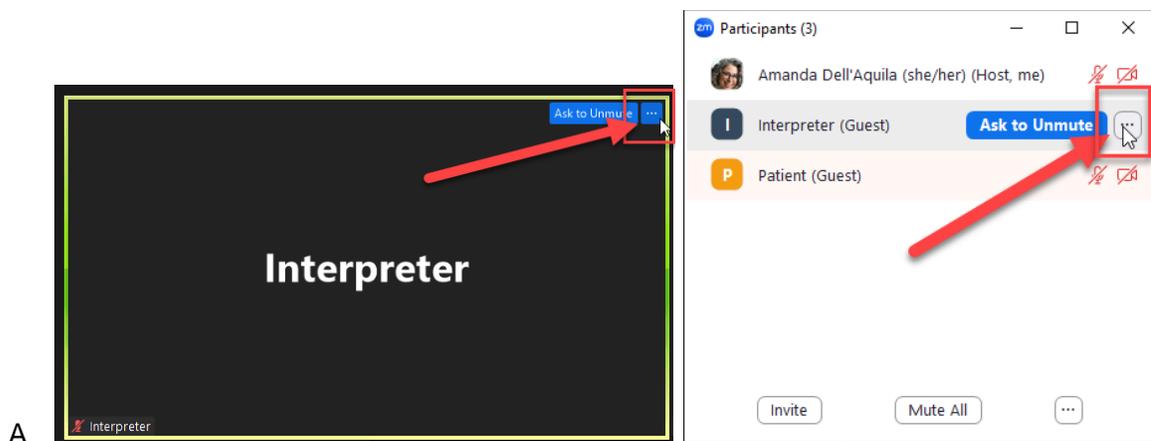
Zoom for virtual health visits has a functionality called **Allow to Multi-pin** which helps American Sign Language interpreters manage their personal screens. This allows them to consistently see those who they are interpreting for regardless of anyone on the visit sharing screen or using other Zoom functionalities on the call.

Note: **Allow Multi-pin** will only allow hosts, co-hosts, and participants on the call who have been enabled by a host/co-host to pin multiple videos on their personal screen. This does not affect anyone else's screen set up on the visit.

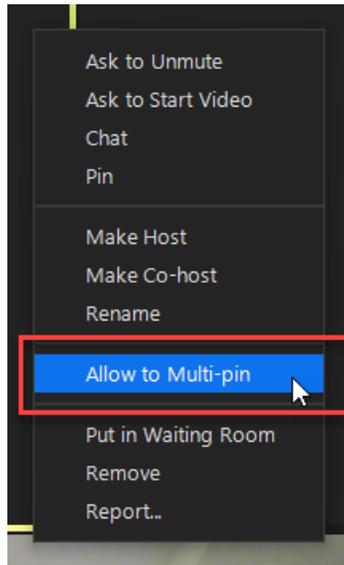
Requirements

This functionality can only be provided to those who are joining from a desktop computer – you cannot give someone who is joining from a mobile device this functionality.

1. At the start of the virtual health visit, [admit the interpreter from the waiting room](#) and confirm their identity.
2. Click on the three dots  on the top right-hand corner of either the Interpreter's video or name via the participants window, or right click on their video to reveal the action panel.



3. Select **Allow to Multi-pin**.



4. The Interpreter will now be able to pin multiples speakers on their screen to manage listening to and seeing those who are speaking and signing.

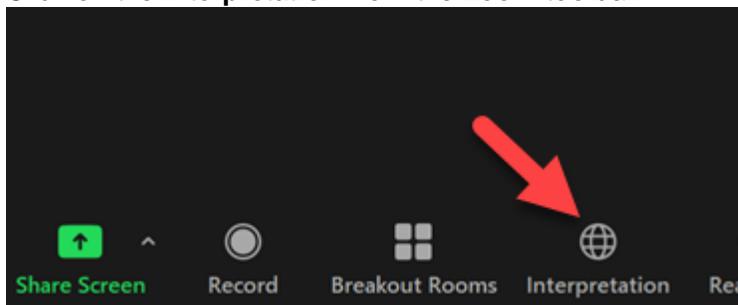
During – Hosting Spoken Language Interpreter for single patient virtual health visits

For single patient Spoken Language interpreting continue the virtual health visit as a regular conversation utilizing the basic functions of Zoom such as mute and unmute to manage any background noise while others are speaking/interpreting. This is known as consecutive interpreting and is considered more manageable for a one-on-one virtual health visits.

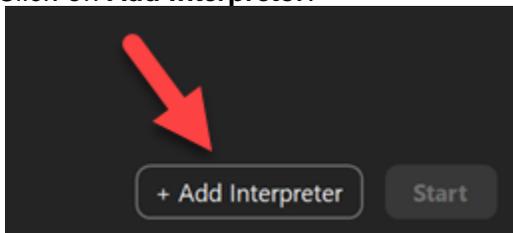


During - Designating an American Sign Language Interpreter for group session or webinar

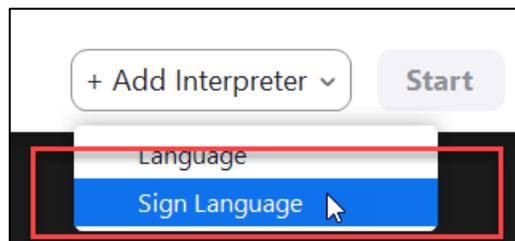
1. Start the meeting as a Host.
2. The Interpreter will join the visit as a participant. After the Interpreter has joined the meeting, as Zoom etiquette we recommend you confirm with your Interpreter(s) what their functionality preferences are for the visit. They may benefit from being provided:
 - o **Allow Multi-pin** function listed in the [During – Hosting an American Sign Language Interpreter for single patient virtual health visits](#) section so they can ensure they can always see the other ASL participants.
 - o **Co-host** abilities to manage challenges or changes during the visit without having to interrupt the flow of the session.
3. Click on the **Interpretation** from the Zoom toolbar.



4. Click on **Add Interpreter**.

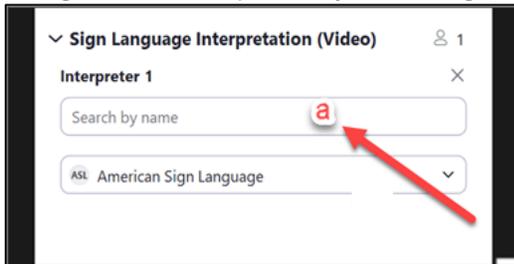


5. Select **Sign Language**.





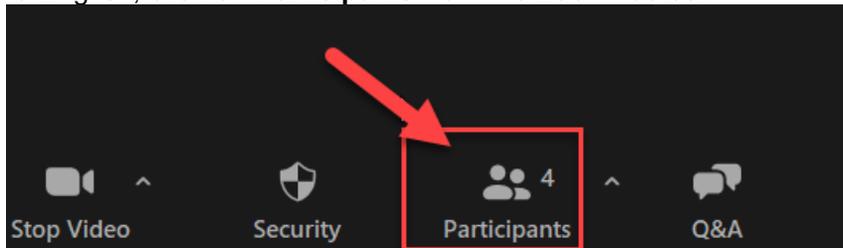
- Designate the Interpreter by searching for the Interpreter's name in the field (a).



- Once the interpreter is added, you will notice that you do not see their name or video on the main Zoom screen with all participants. This is because now the interpreter is only visible to attendees who have selected ASL as their preferred language channel.

Additionally, after adding the ASL interpreter, Zoom automatically mutes them, and these settings can only be changed by either the Zoom host or co-host by following the steps below.

- To unmute the sign language interpreter so all of the participants can hear the interpretation of sign language to English, click on **Participants** from the Zoom toolbar.

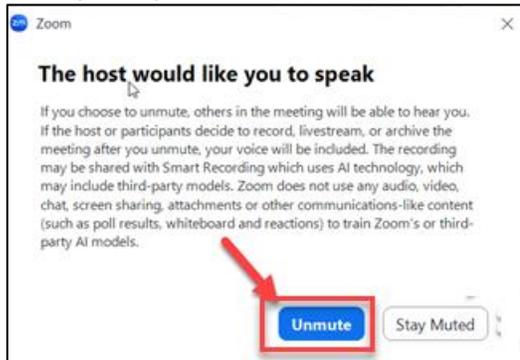


- A participant list will now appear on the right of your screen. Hover over the ASL interpreter name and click on **Allow to talk**.





10. Verbally tell the Interpreter that they will be sent a prompt that they must accept by clicking **Unmute** in order to be heard by everyone in the visit.



11. The Interpreter can now speak and you will now be able to see their video on your screen again.



During - Designating Spoken language Interpreter(s) for group session

Purpose

Zoom for Healthcare has a feature that allows a live interpreter to do simultaneous interpreting (as opposed to consecutive interpreting) for participants/people that speak a language other than English while the health care provider does the presentation, and other participants speak English. Participants/people must choose their language channel in order to hear their preferred language.

Note: This [two-page reference guide](#) can be shared with participants/people that speak a language other than English 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 interpreting.
- **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'.

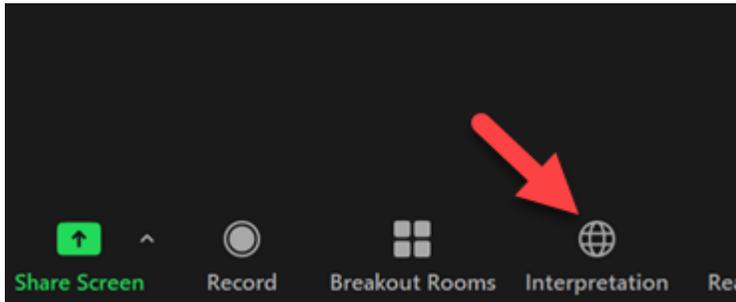


4. Click on “+” to add any language you might need.

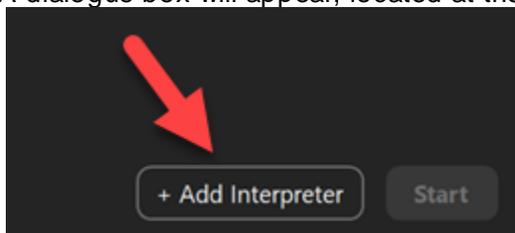
1. Start the meeting as a Host.
2. The Interpreter will join the visit as a participant. After the Interpreter has joined the meeting, as Zoom etiquette we recommend you confirm with your Interpreter(s) what their functionality preferences are for the visit. They may benefit from being provided:
 - a. Co-host abilities to manage challenges or changes during the visit without having to interrupt the flow of the session.



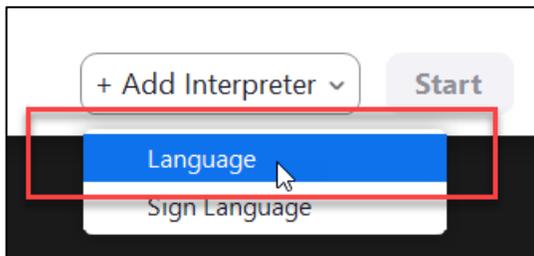
3. Click on the **Interpretation** (globe) icon from the Zoom toolbar at the bottom of your screen.



4. A dialogue box will appear, located at the bottom you will see **+ Add Interpreter**, click the button.



5. Select **Language**.



6. Designate the Interpreter by:

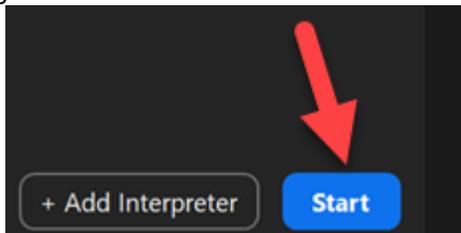
- a. Search for the Interpreter's name in the **Interpreter** field.
- b. Then select what language you want English interpreted to (from the drop-down menu on the right).



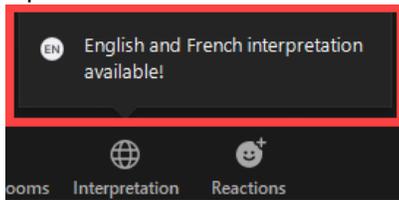
c.



- Once you have set the desired settings, click on **Start** to turn on interpretation functionality for the meeting.



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

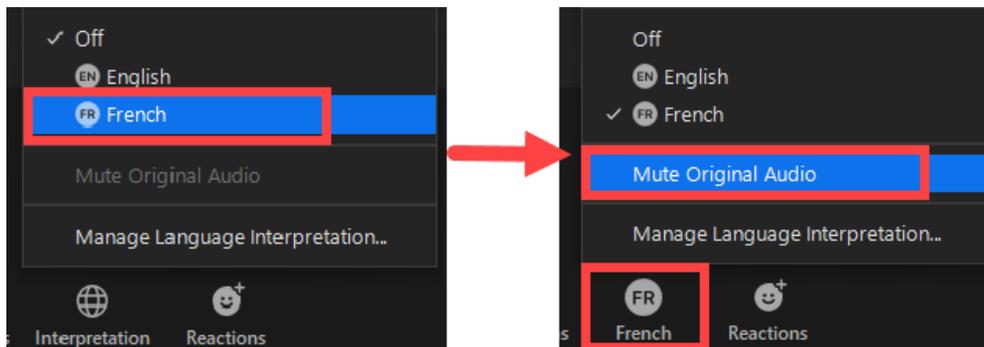


- Click on **Interpretation** and click on **English** to turn on the feature.



- Ask participants/people that speak a language other than English participants to also click on **Interpretation** and click on their desired language.

- The participants/people that speak a language other than English's toolbar will now have the desired language button. Ask them to click on it once more to **Mute Original Audio**.

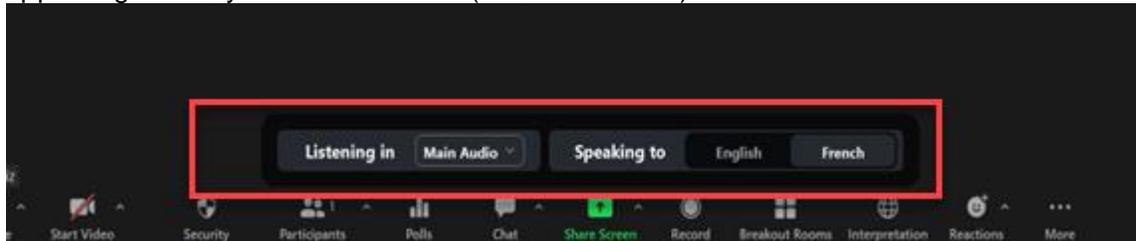


If original audio is not muted, the participant will hear both English speaking audio & interpreter's audio at the same time.

- Continue your virtual health visit.

During – Instructions for a Spoken Language Interpreter – toggling between languages

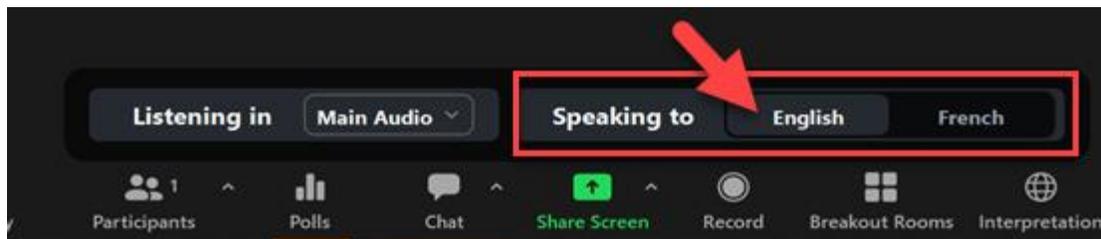
1. Once your Zoom Host has added you as an Interpreter and turned on the interpretation functionality your audio will be automatically muted for all the meeting attendees except the ones who have selected interpretation in the other language. You will see a new bar (with **Listening in** and **Speaking to** options) appearing above your Zoom toolbar (as shown below).



2. Leave the settings on the bar as is, when interpreting from English to other language (i.e. Listening in “Main audio”, Speaking to bar toggled to other language like French in the example shown above)
3. If you want to interpret from the “other desired language” to “English”, (keep Listening in set as “Main Audio”) and toggle the “**Speaking to**” bar to **English**.

Attendees with English set as their preferred language will now be able to hear you clearly, while your audio will be muted for those with interpretation set to “other desired language”.

Note: To switch back to interpreting **English** to the “other desired language”, reset the bar to Speaking to: “other desired language”.



4. Alternate between Steps 2-3 to interpret back and forth during the meeting, as necessary.

During – Instructions for a Spoken Language Interpreter – Bidirectional interpretation with more than one Spoken Language Interpreter

Zoom allows for bi-directional interpretation, allowing interpreters to jump back and forth between language channels to support dialogue.

If there are more than one spoken language interpreters on the call, some additional steps need to be followed to ensure a smooth bi-directional interpretation relay.

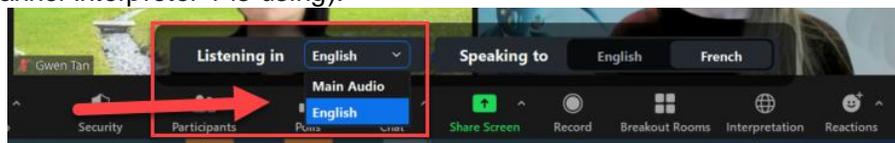
An example scenario is included for your reference so you can understand the applicability of this functionality.

Example Scenario:

Interpreter 1: Spanish; Interpreter 2: French

With the default Zoom interpretation settings (as outlined in section B above), when Interpreter 1 wants to interpret from Spanish to English, Interpreter 1 will need to set their Speaking to channel to “English”, however Interpreter 2 will not be able to hear Interpreter 1 speak in English, unless the following steps are followed:

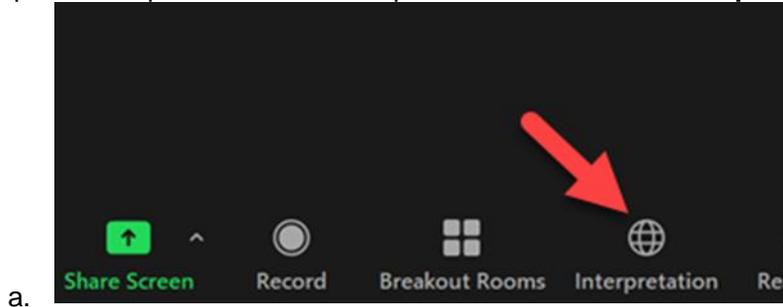
1. Interpreter 2 will need to set their “Listening in” channel to English (to tune into the “Speaking to” channel Interpreter 1 is using).



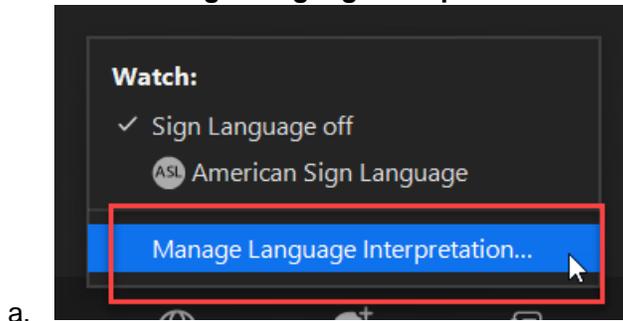
2. Once the interpretation relay is over, and we are switching back to the main meeting flow i.e. rest of the attendees/ English speakers speaking, Interpreter 2 will need to switch the “Listening to” channel back to Main audio to be able to hear the rest of the audience.

Updating interpreter(s) designation or ending interpretation

1. To update interpreters, or end interpretation, click on the **Interpretation** icon.



2. Then click on **Manage Language Interpretation...**



3. Which will bring up a pop-up window where you can:
 - a. **Update** interpreters by remove/change who you have designated as an interpreter.
 - b. **Add new interpreters** who haven't been designated yet, or
 - c. **End** to completely close the interpretation during the meeting. Once the interpretation ends, the Interpreter will now be a regular participant in the call and all attendees will be able to hear each other's audio.





Captioning

Purpose

Zoom for Healthcare has a **Live Transcript** captioning feature that is auto-generated and is acceptable for *internal* ad-hoc general meetings or casual conversation. Live Transcript should be used as a secondary medium of communication.

In contrast, **Communication Access Real-Time Translation (CART)** is closed captioning services provided by a professional captioner. CART services should be requested to support accessibility for patients who have identified themselves as Deaf, Deaf-Blind, and/or Heard of Hearing and patient who are not proficient or do not know American Sign Language. This service offers immediate, verbatim streaming of voice-to-text translation while using Zoom for Healthcare for medical appointments and group education sessions.

Both of these features can improve access to care for patients or staff who might have hearing loss, may be deaf, hard of hearing and who may not know American Sign Language, or that would benefit from reading and seeing what is said during the virtual health visit. Transcripts from the visit will not be saved.

Note:

Please read [these guidelines](#) before proceeding with Zoom captioning features.

Requirements

- For Closed Captioning, the host or organizer needs to call PLS (604.297.8400 or Toll-free: 1.877.BC TALKS (228-2557) or [online](#) to request a CART service.
- **Closed captioning** needs to be enabled for your account and for some users, may already be automatically enabled. Follow the steps below to confirm:
 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

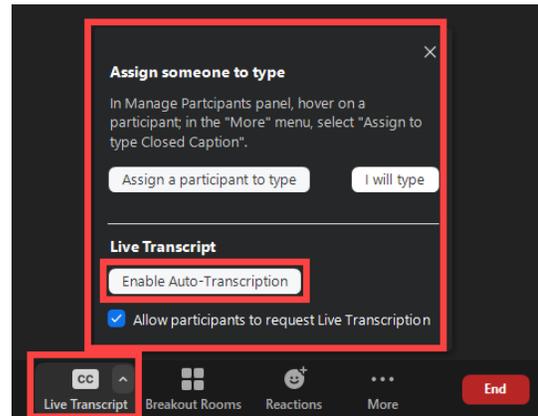
Allow host to type closed captions or assign a participant/3rd-party service to add closed captions

- Allow use of caption API Token to integrate with 3rd-party Closed Captioning services
- Allow live transcription service to transcribe meeting automatically
- Allow viewing of full transcript in the in-meeting side panel

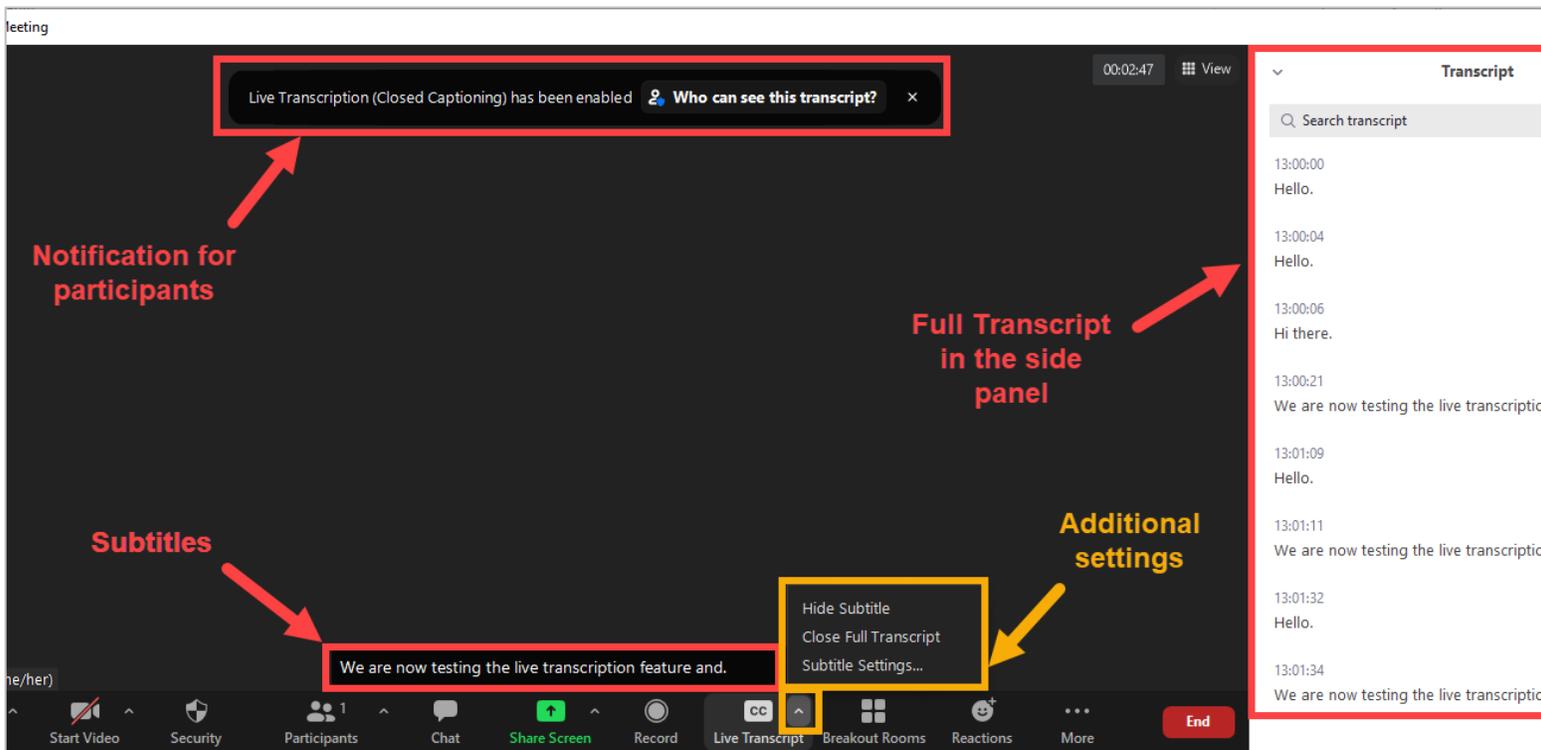


Live Transcription

1. Start your virtual health visit as the host.
2. Click **Live Transcript** on your meeting toolbar.
3. Click **Enable Auto-Transcription**.



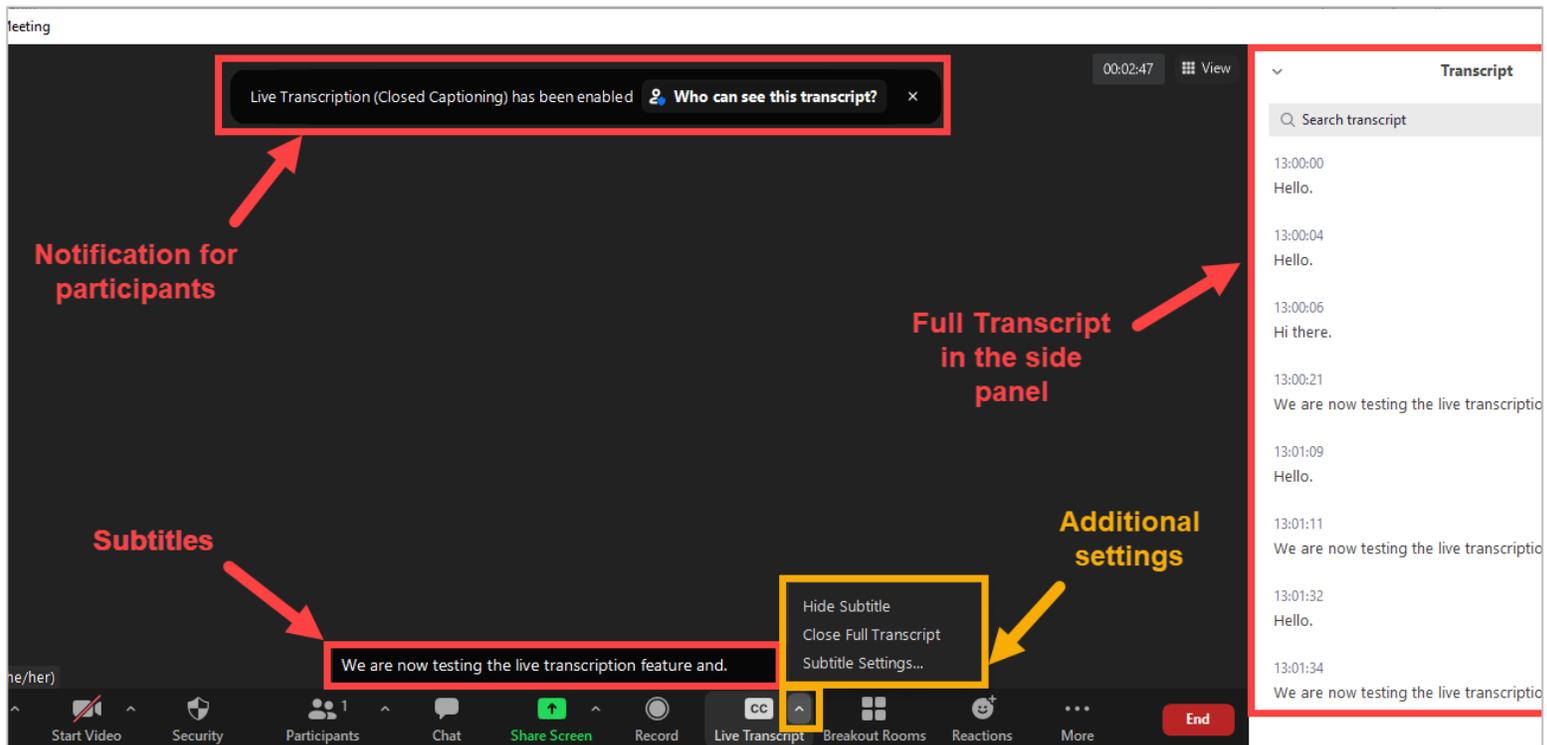
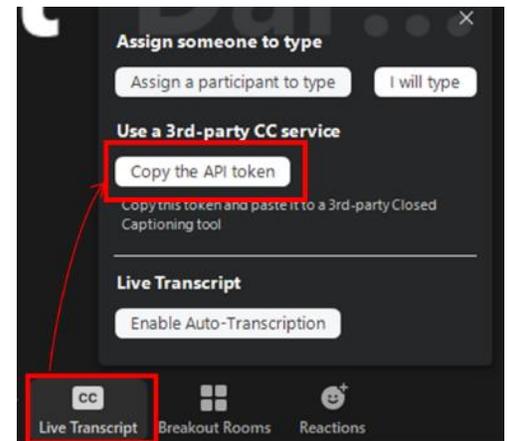
4. A notification will appear in the Zoom meeting window for all participants. All participants will now be able to:
 - a. View or hide **Full Transcript** in the in-meeting side panel
 - b. View or hide **subtitles**
 - c. Access additional subtitle **settings** in the desktop client.



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, connect ([online](#) or call) with PLS to request a professional captioner, when Deaf, Hard of Hearing, or hearing loss 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.

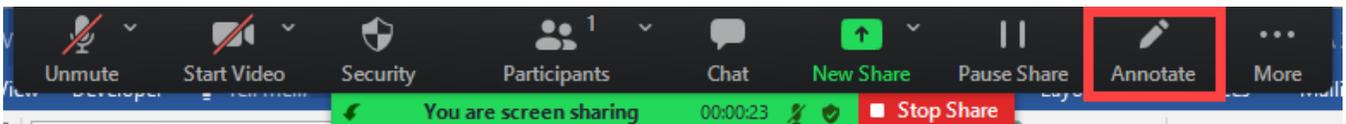
Annotation

Purpose

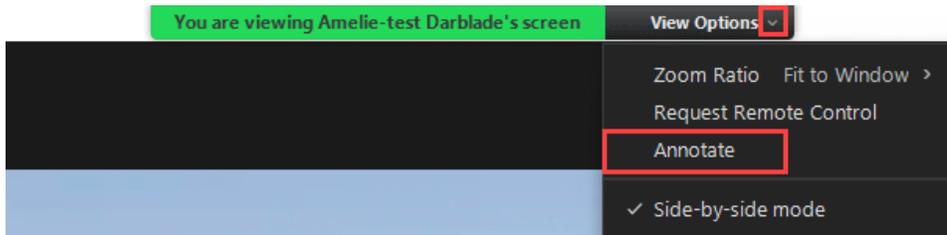
Zoom for Healthcare has a feature that allows participants to add hand drawn annotations to a shared screen during a Zoom virtual health visit. When the host shares their screen, both the host and participants can use the annotation tool to share information. Annotations are not saved after the visit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

Annotation during a virtual health visit

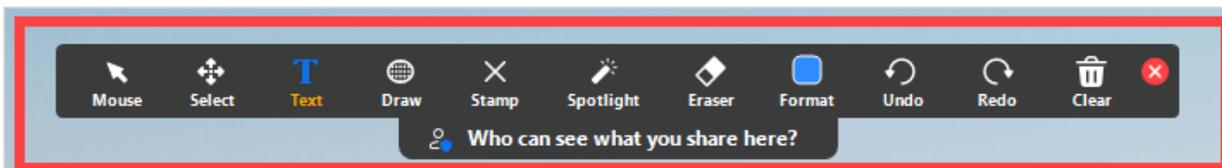
1. The host will start the virtual health visit.
2. Click on **Share Screen** on the meeting toolbar to [share your screen](#).
3. A share screen toolbar will appear.
 - a. **Host:** Click the **Annotate** tool.



- 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

Best practices security for Zoom virtual health visits.....	136
Zoom and PIPEDA/PHIPA compliance	137
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Best practices security for Zoom virtual health visits

Zoom for Healthcare security best practices

1 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.

2 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.

3 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.

4 Confirm patient identity

Make sure you have the correct patient before disclosing any information.

5 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*.

6 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*.

7 Do not click on links you do not trust

Similar to email, do not click on links that are not credible.

8 Use the most up-to-date version of Zoom

If you are using a personal device, check for updates.

9 Only allow the Host to screen share

Zoom web browser > *Settings* > *Who can share* > Select *Host Only*. Before screen sharing, close private applications and documents.

Default settings used in Zoom for Healthcare:

<p>Passwords are turned on</p> <p>This provides another layer of security, to discourage Zoom-bombers.</p>	<p>Waiting rooms are turned on</p> <p>This allows you to screen who is let into the meeting. The host lets them in.</p>	<p>Recordings are disabled</p> <p>Zoom recordings have been disabled to protect patient.</p>
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[COVID-19 toolkit](#) | officeofvirtualhealth@phsa.ca
Office of Virtual Health
Connecting for health
Updated: June 2, 2020

Zoom for Healthcare created by Provincial Virtual Health – Education, **Effective date:** September 19, 2024
 This 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.

Page ♦ 136



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 retainment 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>.



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.



FAQ's

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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>
- 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](https://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 PVHZoomSupport@phsa.ca for more information and feedback.



Appendices

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Appendix 1: Links to resources

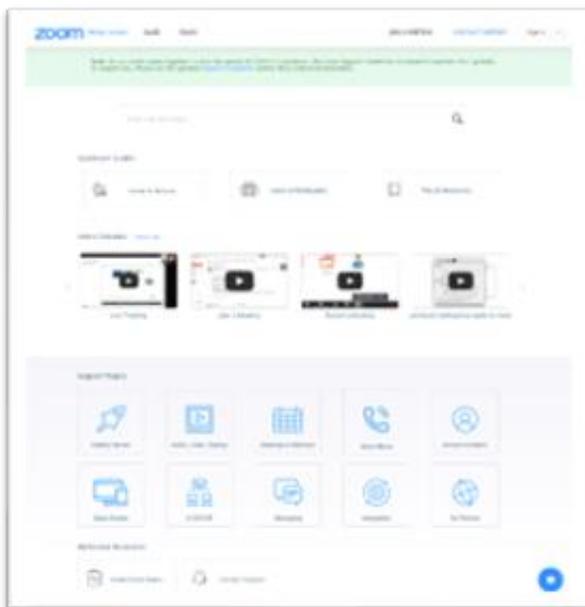
Provincial Virtual Health Zoom for Virtual Health Visits Resources

[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](#)

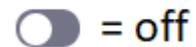
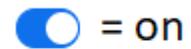
* These are general resources for using Zoom. They may vary from this documentation and in some instances, not apply to the Zoom for Virtual Health Visits instance.



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/>. 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:



Account Setting	Purpose	Recommended Setting
Security		
Waiting Room	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.	This is permanently turned ON
Require a passcode when scheduling new meetings	Generates a passcode for a virtual health visit. This is permanently turned on as a security measure.	This is permanently turned ON
Embed passcode in invite link for one-click join	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.	
Only authenticated users can join meetings	Allows participants to join the virtual health visit without a Zoom account (free or paid).	
Schedule Meeting		
Allow participants to join before host	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.	This is permanently turned OFF
In Meeting (Basic)		
Chat	Allow virtual health visit participants to send a message visible to all participants	
Sound notification when someone joins or leaves	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.	
Co-host	Allow the host to add co-hosts for the virtual health visit. Co-hosts have the same in-meeting controls as the host.	
Meeting Polls	Adds a button for 'Polls' to the virtual health visit meeting controls. This allows the host to survey the attendees.	
Screen sharing	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'.	

Providing support for Zoom for Healthcare to:



Whiteboard	Allows the host to share a whiteboard during a virtual health visit	
In Meeting (Advanced)		
Breakout room	Allows the host to split virtual health visit participants into separate, smaller rooms	
Virtual Background	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.	



Appendix 3: Technical support for Zoom virtual health visits

FOR STAFF

PHSA service desk:

(604) 675-4299; servicedesk@phsa.ca

PHC/VCH service desk:

(604) 875-4334; servicedesk@vch.ca

Island Health service desk:

(250) 370-8777; servicedesk@viha.ca

For account related support or other questions, please email:

PVHZoomsupport@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.

Alternative Hosts

Example: mary@company.com, peter@school.edu

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:

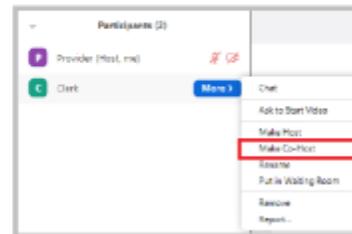
1. Sign into your Zoom for Virtual Health Visits account on the web browser - <https://zoom.us/>
2. Click **Settings**.
3. Scroll to **Co-host** and toggle it to 'on'.

Co-host

Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

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



Office of Virtual Health
Connecting for health

Your virtual health visit with Zoom



START

Now that you have read the [notification form](#) outlining the potential risks of using digital communication and you have given your consent to use Zoom...



Receive the invitation via email

Your health care team will send you an email containing:

- Link to join the Zoom appointment
- Link to instructions on how to get started
- Help desk phone number

No email? Check your spam/junk folder. Contact your health care team if needed.



Prepare for your Zoom appointment



OR



Use Google Chrome to join if you cannot download Zoom.

[Download Zoom](#)

Join a [test meeting](#) to test your audio and video.

- Use headphones for better sound quality and more privacy



Join your Zoom appointment

Open your email invitation and click/tap the Zoom appointment.

Allow access to your camera and microphone if asked.

On computers, choose [Use Computer Audio](#). Choose [Phone Call](#) if audio/internet connection is poor.

On smartphones and tablets, choose [Call Using Internet Audio](#).



Start your Zoom appointment

Make sure your camera is on and unmute your microphone.

Your health care provider will confirm your identity.

Introduce your friend, or family member if they are off-camera.

Ask clarifying questions and talk about your needs, just like an in-person visit.

Confirm your care plan or next steps before ending the Zoom appointment.



Wait in the virtual waiting room

Your health care provider may be delayed while seeing other patients. Please wait.

You will be admitted into your Zoom appointment when they are ready.



Need technical support?

Contact the patient help desk:
1-844-442-4433 (Toll-free)

You can also visit the [Zoom Patient Resources](#) page.

If you have any feedback or concerns about the use of Zoom for your appointment, please email:
officeofvirtualhealth@phsa.ca



Helpful tips

Find a well-lit private space with reliable internet or a wired connection to avoid data charges.

Consider having a friend or family member for support and to help troubleshoot.

Have your health care team's phone number handy

Have pen and paper to write down notes or questions.

Providing support for Zoom for Healthcare to:

