

# ZOOM Instructions for New Users:

Using Zoom to connect virtually with patients during COVID-19 crisis

## 1. Create a ZOOM account

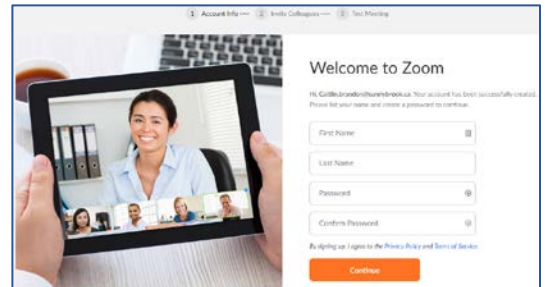
Open your browser to: [www.zoom.us](http://www.zoom.us)

### Basic Account:

- Free for any user
- Allows meetings of 40min or less

### Pro Account:

- \$20 CAD/month or \$200 CAD/year
- Allows meetings to be any desired length
- Can add on features such as Webinar, Toll-Free number for audio, etc.



## 2. Obtain and Document Consent

**ZOOM is NOT a PHIPA compliant/tested service, however during times of need, consent can be obtained to communicate with patients via non-secure means.**

### Script to OBTAIN consent to book a virtual appointment with a patient:

“Just like online shopping or email, Virtual Care has some inherent privacy and security risks that your health information may be intercepted or unintentionally disclosed. We want to make sure you understand this before we proceed. In order to improve privacy and confidentiality, you should also take steps to participate in this virtual care encounter in a private setting and should not use an employer’s or someone else’s computer/device as they may be able to access your information.

If you want more information, please check the link on our [website, etc.]. If it is determined you require a physical exam you may still need to be assessed in person. You should also understand that virtual care is not a substitute for attending the Emergency Department if urgent care is needed. Are you ok to continue?”

### DOCUMENTING consent in the patient chart:

“Informed verbal consent was obtained from this patient to communicate and provide care using virtual and other telecommunications tools. This patient has been explained the risks related to unauthorized disclosure or interception of personal health information and steps they can take to help protect their information. We have discussed that care provided through video or audio communication cannot replace the need for physical examination or and in person visit for some disorders or urgent problems and patient understands the need to seek urgent care n an Emergency Department as necessary.”

These scripts have been copied directly from OMA Guidelines, effective March 14, 2020

### 3. Set Up Meetings (aka Appointments)

Within the browser-based dashboard, navigate to **“Meetings”** in the left menu.

Click **“Schedule a New Meeting”**.

**Complete the form** (meeting description not required):

- Consider including only patient initial and last name in meeting title for privacy purposes

**Ensure the following items ARE checked off to facilitate easy connection for patients:**

- Video is ON for both Host (you) and Participant (patient)
- Audio is selected as BOTH for phone and computer audio

**Ensure the following items are NOT checked off:**

- Meeting Options choice is not selected for **“Mute participants upon entry”**

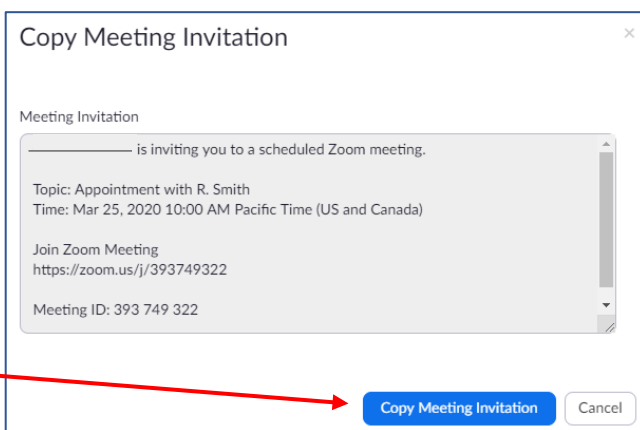
You may wish to include added security for your meeting by selecting **“Require meeting password”**

**Save** your meeting settings at the bottom of the page.

### 4. Share ZOOM Appointment with Patient/Caregiver

**Once you have saved your Meeting setup a summary page will be displayed.**

- You may add the appointment to your own Outlook calendar via the link shown
- Select **“Copy the invitation”** to open a window with all relevant information for the patient/caregiver
- In pop-up window, click **“Copy Meeting Invitation”**; Paste this information into an email to the patient/caregiver



### 5. Connect To Your Appointment

**On the day and time of your scheduled appointment you can begin your Meeting a number of different ways:**

1. Open your browser, login to ZOOM via [www.zoom.us](http://www.zoom.us) and Start your meeting from the list of meetings (see **“Meetings”** in left menu bar)
2. Open the ZOOM application from your Programs list; Sign in; Navigate to the **“Meetings”** icon at the top, and select the desired meeting; click **“Start”**
3. Open your Outlook calendar entry; click the link to launch ZOOM application; this will launch that specific meeting

### 6. End Your Appointment

**Be sure to end the meeting when your appointment is complete.**

On the right side of the ZOOM video menu bar, click **“Leave Meeting”**; then select **“End meeting for all”**. This will all close the meeting for all participants.