

Zoom for Healthcare User Guide

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1. GLOSSARY OF TERMS

For the purpose of this document, the below terms may be referenced.

Clinician – The health care provider who leads the virtual appointments with the patient.

Coordinator – The Team Admin Support or a Team Clinical Coordinator who will add patient profiles to the portal and schedule virtual appointments on behalf of the Clinician with patients.

Patient - The patient or client that the Clinician will be meeting with for their virtual appointments.

Zoom for Healthcare (Zoom) – Zoom for Healthcare is a secure, web-based virtual care platform for video and audio conferencing and collaboration across mobile devices, desktops and telephones. **In this document “Zoom” should be interpreted as “Zoom for Healthcare”.**

Zoom Desktop – The technology that enables virtual appointments to be conducted from the Zoom desktop application.

Zoom Outlook add-in – The technology that enables virtual appointments to be scheduled through a Microsoft Outlook add-in and conducted through the use of Zoom.

Outlook – The technology/application installed directly on the device to access and manage email.

Outlook Online (365) – The technology/application opened via the internet browser to access and manage email.

2. WHAT IS ZOOM FOR HEALTHCARE

Zoom for Healthcare is a secure, web-based virtual care platform for video and audio conferencing and collaboration across mobile devices, desktops and telephones.

To help support patient care and health care providers in the current COVID-19 pandemic, the Department of Health has approved and will fund the use of the Zoom for Healthcare solution as a virtual care platform for use on an interim basis. Zoom for Healthcare enables clinicians to deliver health services, expertise and information, in both official languages, in real-time over distance, improving access and eliminating barriers to patient/client care across New Brunswick.

Zoom for Healthcare includes additional security measures to protect the privacy of personal health information being shared over internet channels. The Treasury Board has provided a security opinion and the Department of Health's Chief Privacy Officer has completed a Privacy Impact Assessment.

This user guide focuses on the support for setting up and conducting a virtual client consultation including scheduling, notification and client tracking using Zoom for Healthcare.

3. HOW TO ACCESS AND LOG INTO ZOOM FOR HEALTHCARE

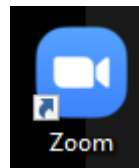
Zoom for Healthcare can be accessed directly from your desktop application or from Outlook. This guide first reviews the instructions for Zoom Desktop.

Additional References:

Section 8: Instructions on Zoom via Outlook

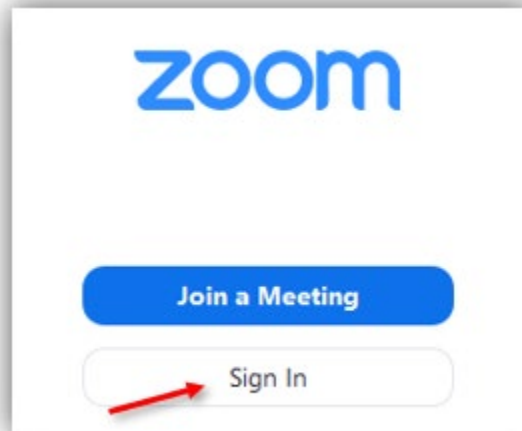
3.1 How to log into Zoom for Healthcare from your desktop

Select the **Zoom** icon on your desktop to access the Zoom desktop client.

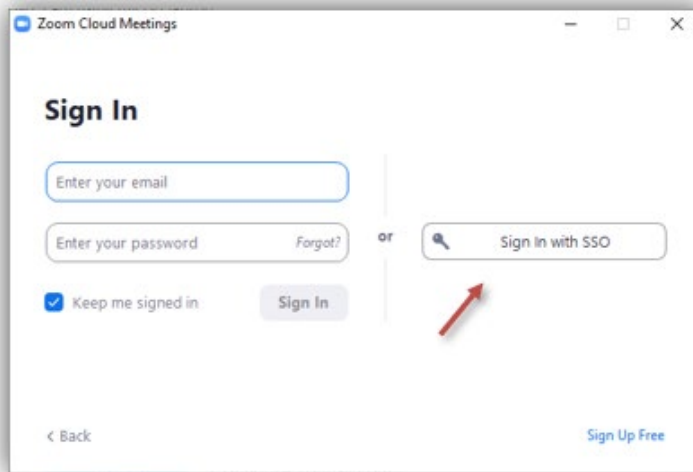


Click **“Sign In”** and use your Active Directory (AD) account credentials (i.e. email address and password). The email address connected to your AD account will end in one of the following: @gnb.ca, @horizonnb or @vitaliténb.ca. For Extra Mural users, you will **NEVER** use your Extra Mural email to log into Zoom.

*Note: In order to ensure that your session is protected under healthcare security, you will **ALWAYS** login using your Active Directory (AD) credentials to book appointments. You will **NEVER** use a personal account to log into the site.*

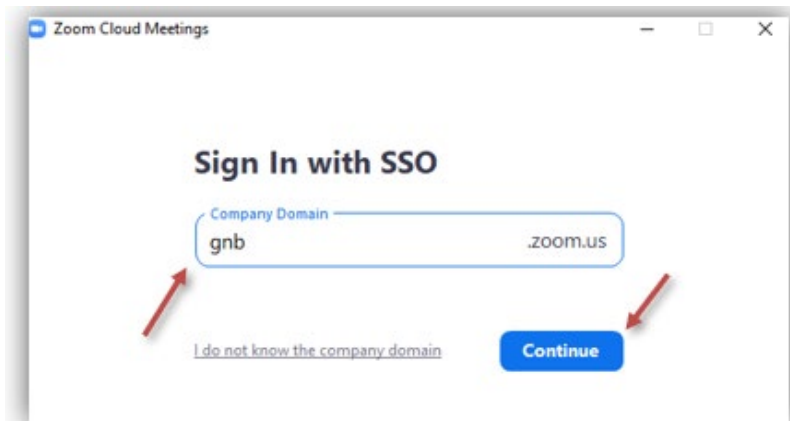


Click “Sign in with SSO”.

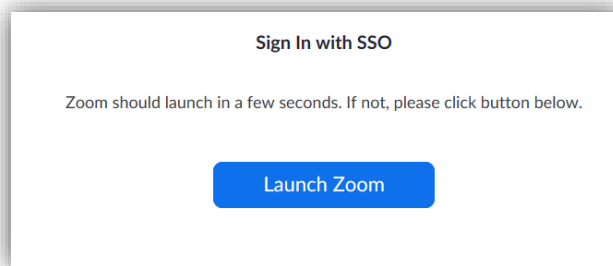


Type “gnb” in the *Company Domain* field and click “Continue”.

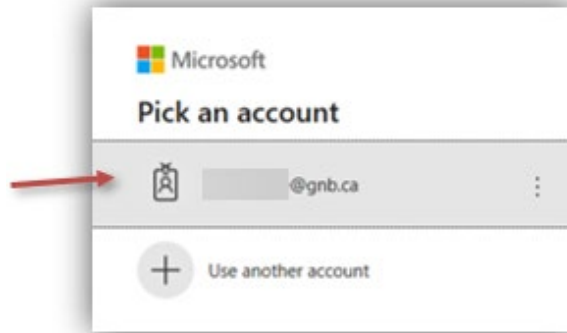
Note: The Company Domain will always be “gnb” regardless of your email suffix.



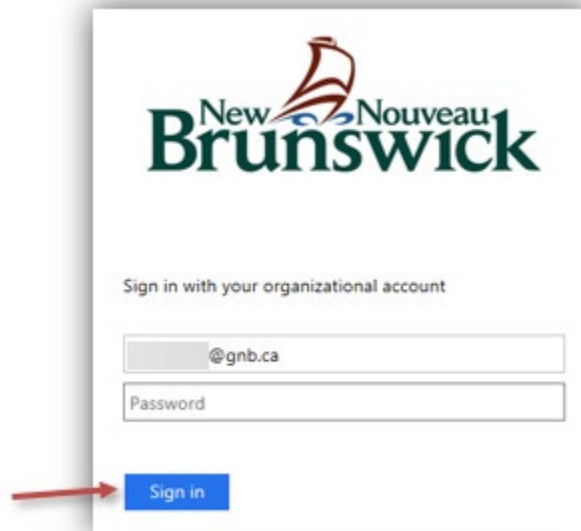
The below screen will appear in your browser window.



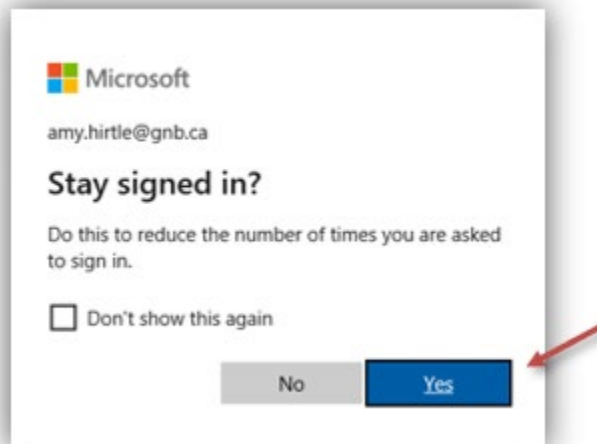
Choose your active directory account from the Microsoft window that appears.



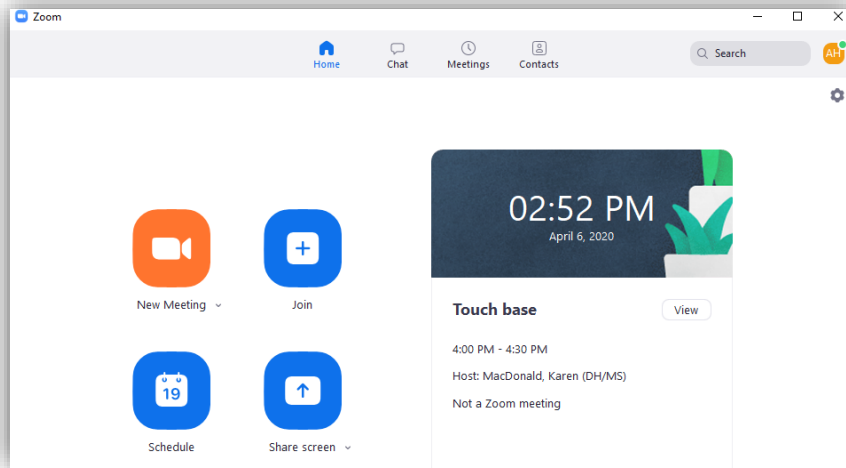
You may be asked to enter your active directory password. Enter your password and click **“Sign in”**.



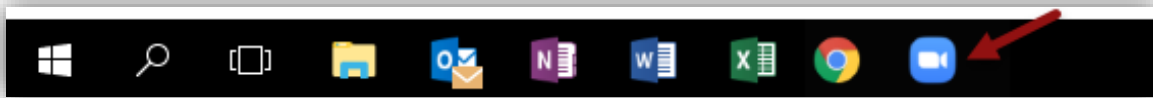
Click **“Yes”** to continue.



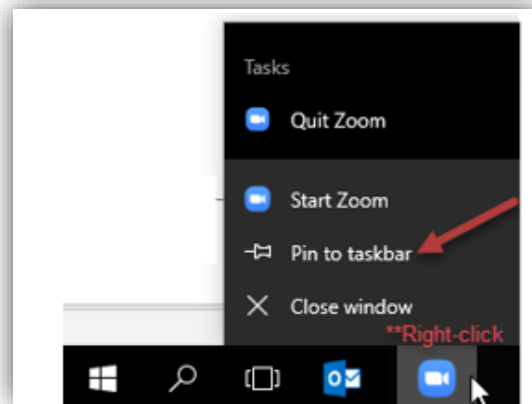
You are now logged into Zoom and the Zoom homepage appears.



Once you have signed in, the **Zoom** icon appears in your taskbar.



To pin the Zoom icon to your taskbar right-click on the Zoom icon and select **"Pin to taskbar"**.

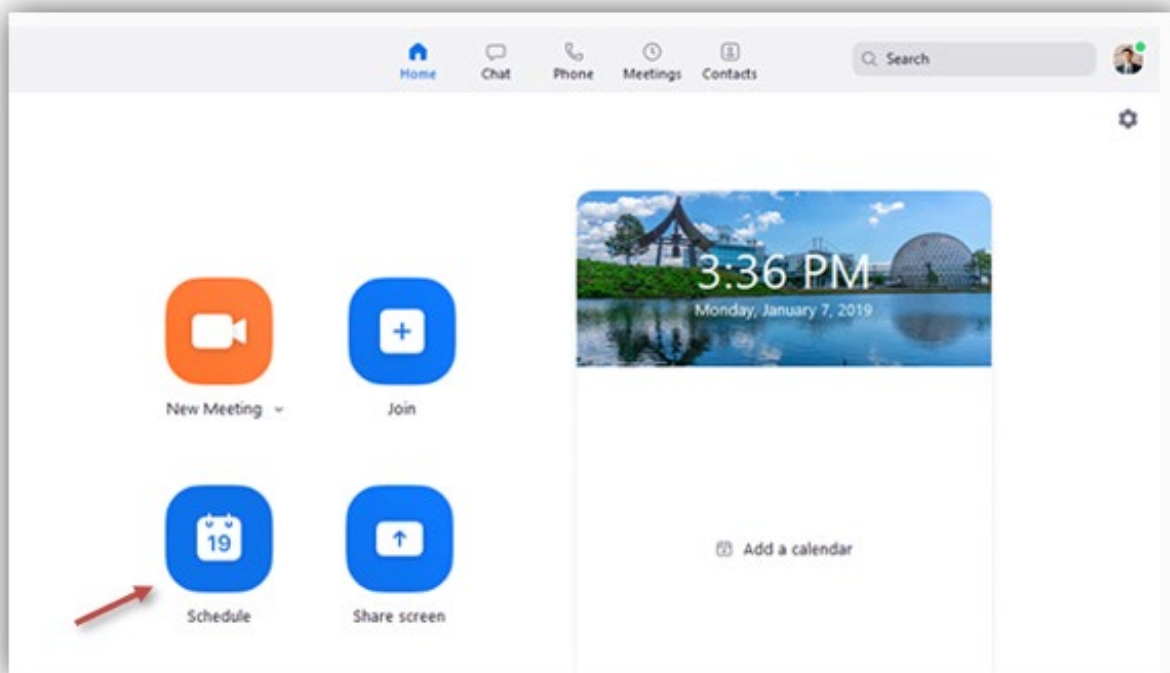


4. HOW TO SCHEDULE VIRTUAL APPOINTMENTS USING ZOOM DESKTOP

4.1 How to schedule virtual appointments using Zoom Desktop (**Access Outlook outside Citrix**)

For users accessing Outlook inside of Citrix, see Section 4.2.

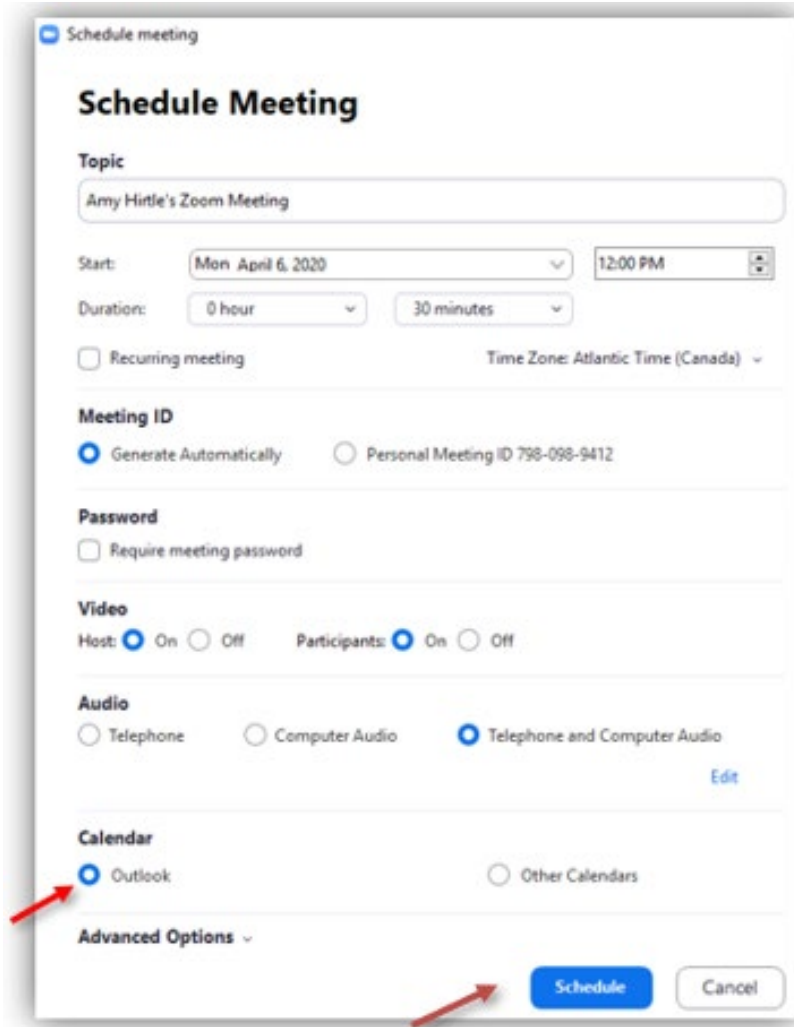
For users who will access the Zoom desktop application to schedule a Zoom virtual appointment and access Outlook outside of Citrix, sign into your Zoom account. From your Zoom homepage, click on the “**Schedule**” icon to open the scheduler window.



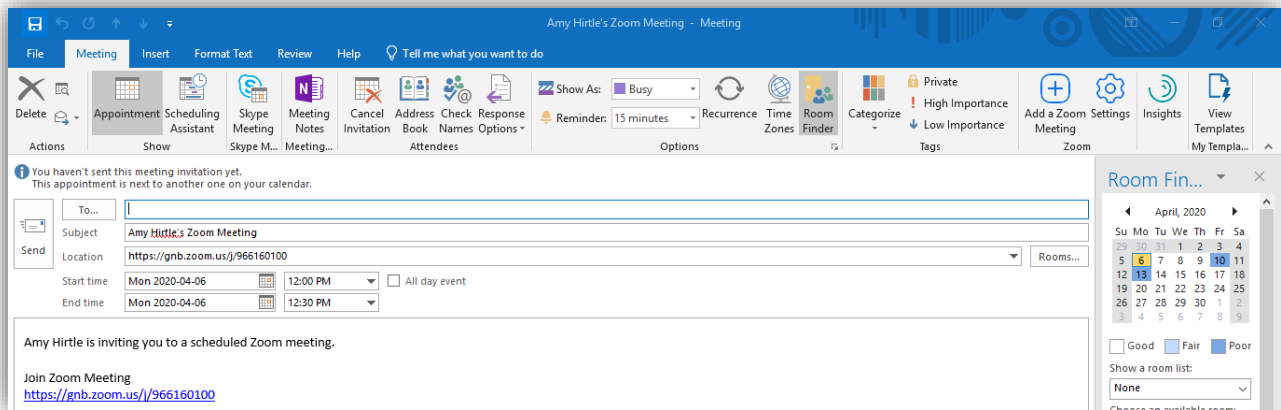
Select your meeting settings.

Note: Some of these options might not be available if they were disabled and locked to the off position at the account or group level.

To add meeting invitation to your Outlook calendar, select **“Outlook”** located under Calendar and click **“Schedule”**.



Enter the patients email address in the **“To”** field and select **“Send”** to send the meeting invitation to the patient and have the appointment added to your Outlook calendar.

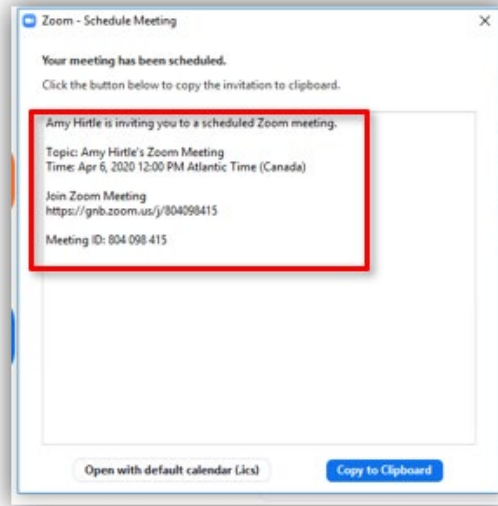


4.2 How to schedule virtual appointments using Zoom desktop (**Access Outlook in Citrix**)

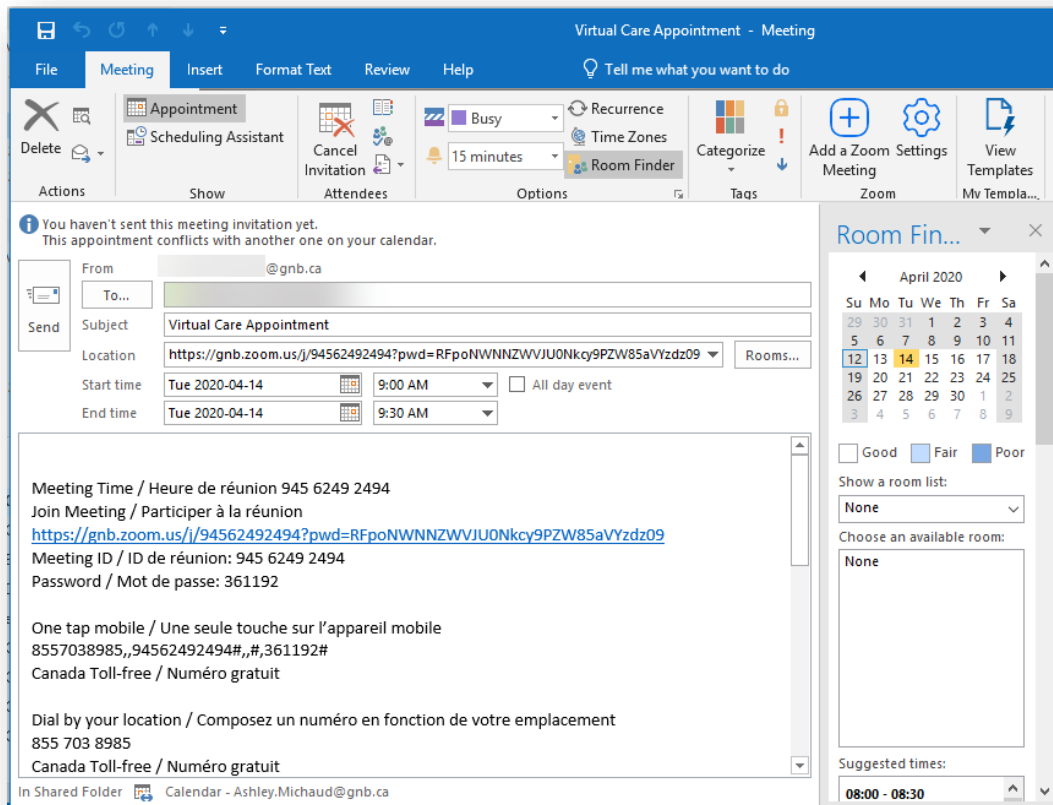
For users who will use Zoom desktop to schedule their appointments and access Outlook through Citrix, click **“Other Calendars”**. When you have finished entering the meeting information, click **“Schedule”**.

The screenshot shows the 'Schedule Meeting' window in Zoom. The 'Calendar' section at the bottom has two radio buttons: 'Outlook' and 'Other Calendars'. The 'Other Calendars' option is selected. A red arrow points to this radio button. Below the 'Calendar' section is an 'Advanced Options' dropdown menu. At the bottom right, there are two buttons: 'Schedule' (highlighted in blue) and 'Cancel'. A second red arrow points to the 'Schedule' button.

Copy and paste the information provided in the window that appears into your Outlook calendar on the date and time you scheduled.



Add the patients email address in the **To** field and click **“Send”**.



The below list shows various features and options available to you when scheduling your virtual appointment.

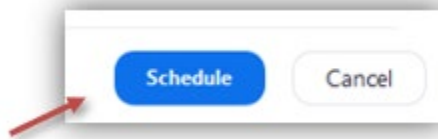
- **Topic:** Enter the patients name in the topic field.
- **Start:** Select a date and time for your meeting. You can start your meeting at any time before the scheduled time.
- **Duration:** Choose the approximate duration of the meeting. This is only for scheduling purposes. The meeting will not end after this length of time.
- **Time Zone:** By default, Zoom will use your computer's time zone.
- **Video**
 - **Host:** Choose if you would like the host video on or off when joining the meeting. Even if you choose off, the host will have the option to start their video.
 - **Participant:** Choose if you would like the participants' videos on or off when joining the meeting. Even if you turn off, the participants will have the option to start their video.
- **Audio:** Allow users to call in via **Computer Audio**.
- **Calendar:** Select a calendar service to add the meeting to and send out invites to participants.
 - If you are using Outlook within Citrix, you will need to select "**Other Calendar**".

Click on the arrow to view additional meeting options.

- **Advanced Options:**
 - **Mute participants on entry:** If *join before host* is not enabled, this will mute participants as they join the meeting. Participants can unmute themselves after joining the meeting.
 - **Schedule For:** If you have scheduling privilege for another user, you will be able to choose who you want to schedule for from the drop-down menu.

Note: A random unique meeting ID will be generated when your meeting is created. Record functionality is not available due to privacy and security concerns.

Click "**Schedule**" located on the bottom right-hand corner to finish and open the selected calendar service to add the meeting.



4.3 Additional Zoom for Healthcare meeting features

A meeting ID will expire **30 days** after the meeting is scheduled for. You can restart the same meeting ID as many times as you would like, within the 30-day period.

Scheduled meetings can be started at any time before the scheduled time. The links will not expire or become invalid unless it is past the 30 day period for a non-recurring meeting, has not been used for over 365 days for a recurring meeting, or has been deleted from your Zoom account. An instant meeting link will expire as soon as the meeting is over.

4.4 How Coordinators schedule Zoom virtual appointments on behalf of Clinicians

Coordinators can schedule virtual appointments on behalf of a Clinician using Zoom for Healthcare by following the scheduling instructions previously identified above.

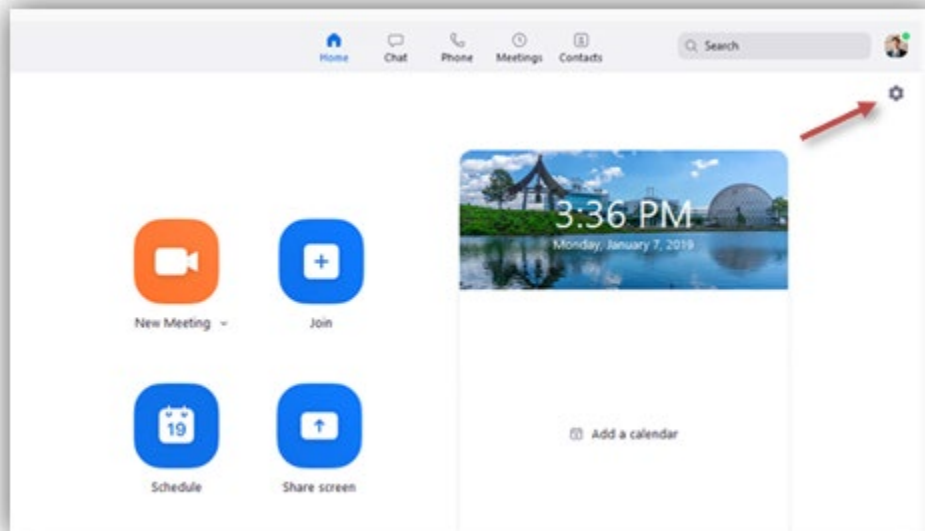
Before a Coordinator can schedule a Zoom virtual appointment on a Clinicians behalf, the Clinician needs to set scheduling privileges for the Coordinator. *Note: Both the Coordinator and the Specialist are required to be licensed users in order to delegate scheduling privileges.*

Scheduling privileges allow:

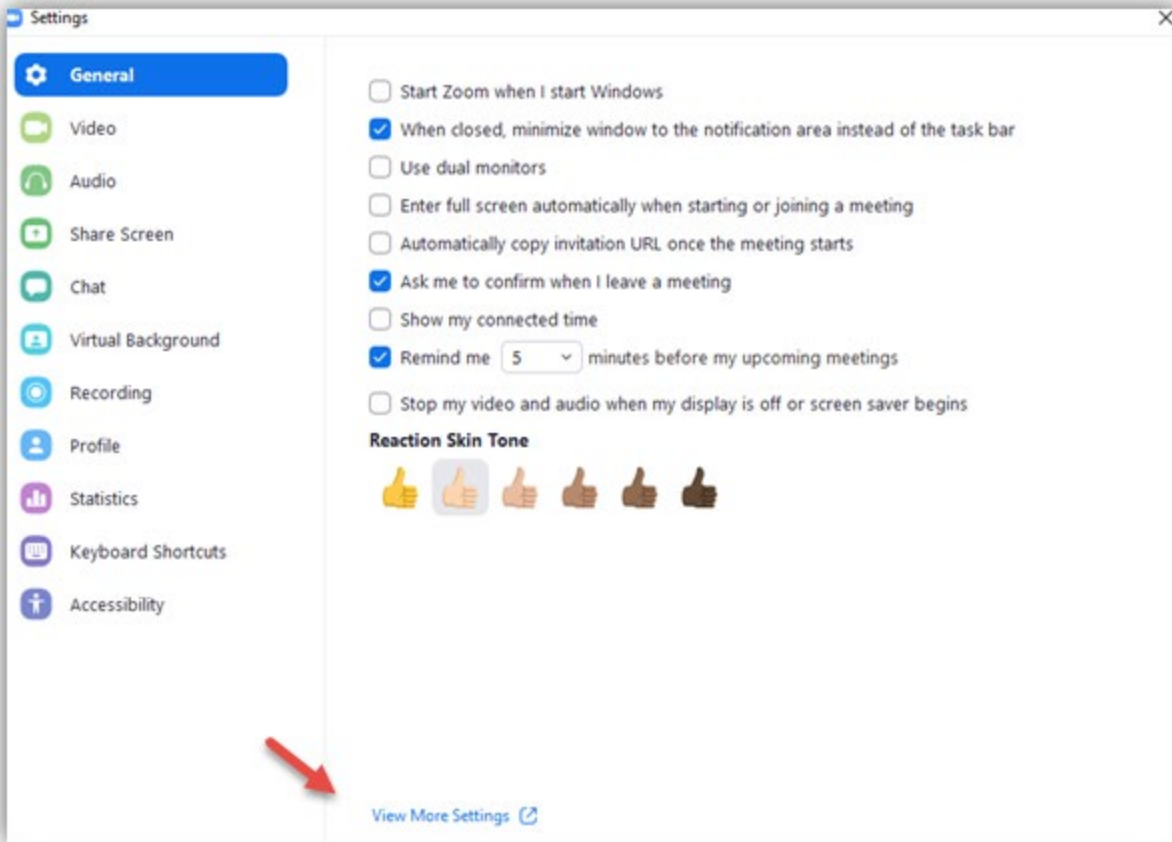
- Clinicians to assign or delegate a Coordinator to schedule meetings on their behalf.
- The Clinicians and assigned scheduler (Coordinator) must hold a Zoom license in order to set scheduling privileges.

Note: Coordinators with Scheduled Privilege on your account can manage and act as an alternative host for all meetings.

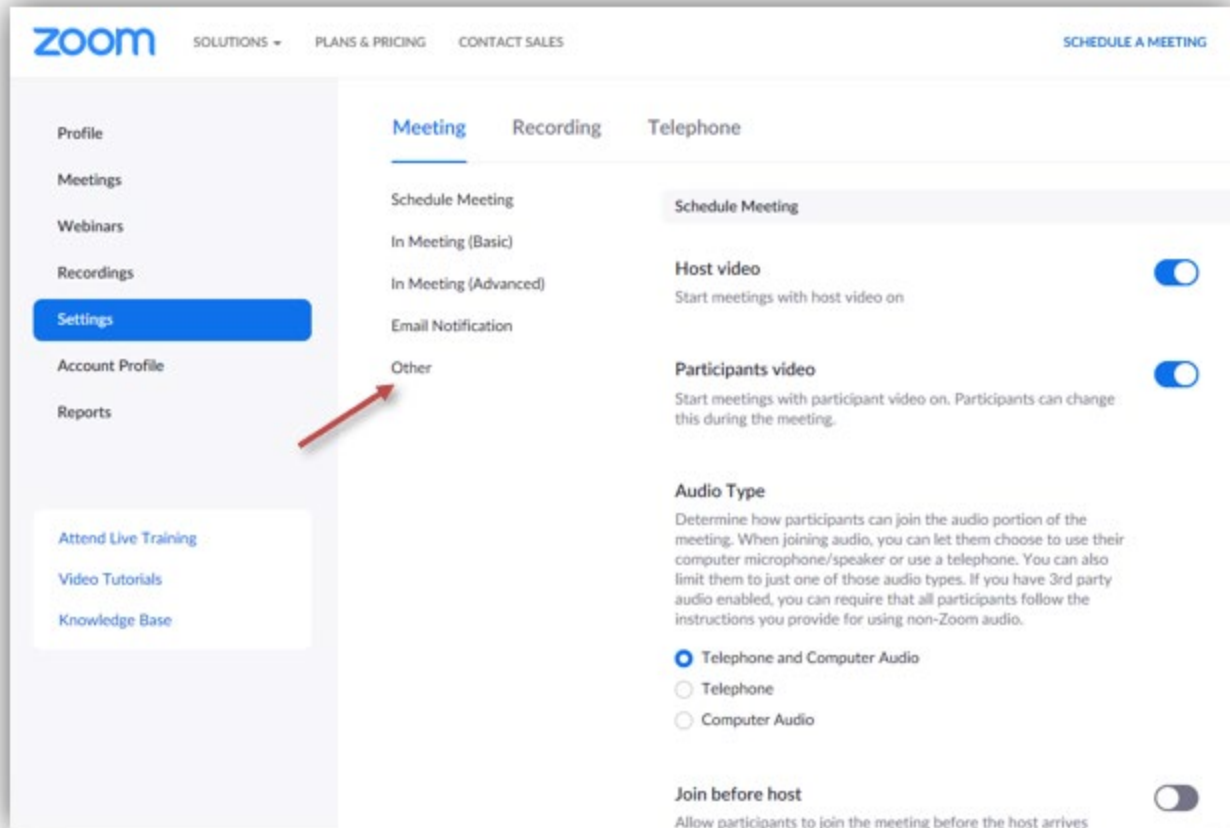
Clinicians can log into Zoom to set scheduling privileges to allow a Coordinator to schedule Zoom virtual appointments on their behalf. Once logged in, click on **“Settings”** identified by the cog wheel in the upper right-hand corner.



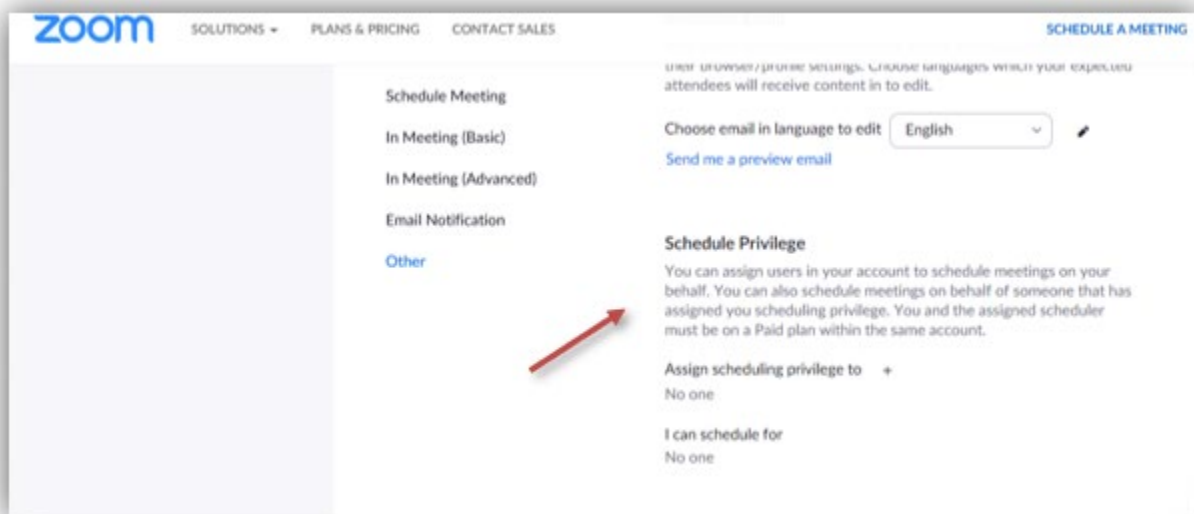
The settings menu appears. Under the General tab, click on **“View More Settings”** located at the bottom of the screen.



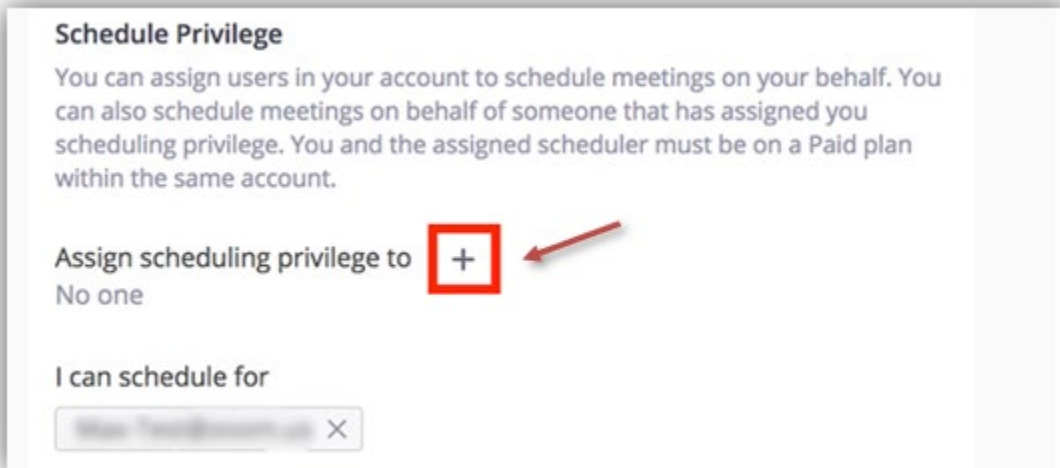
A browser window opens directing you to the additional Settings menu. Click **“Other”** from the menu on the left.



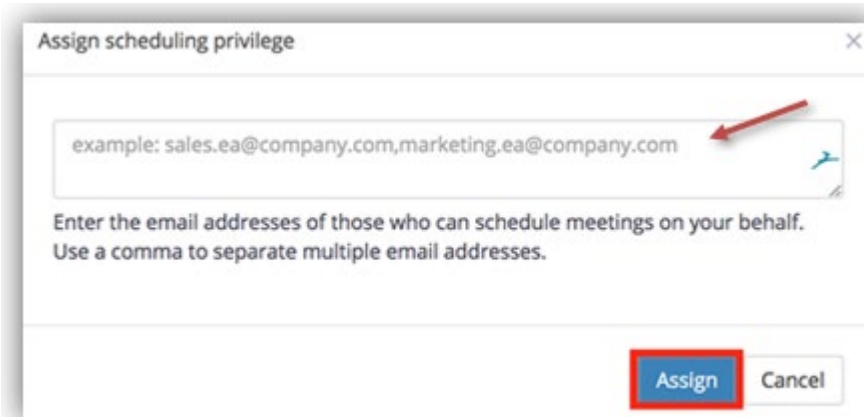
Scroll to the “Schedule Privilege” section.



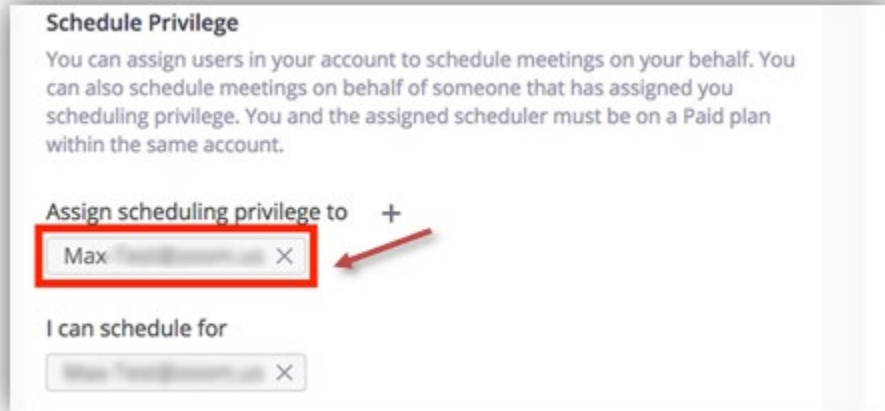
Click the + sign next to “Assign scheduling privilege to”.



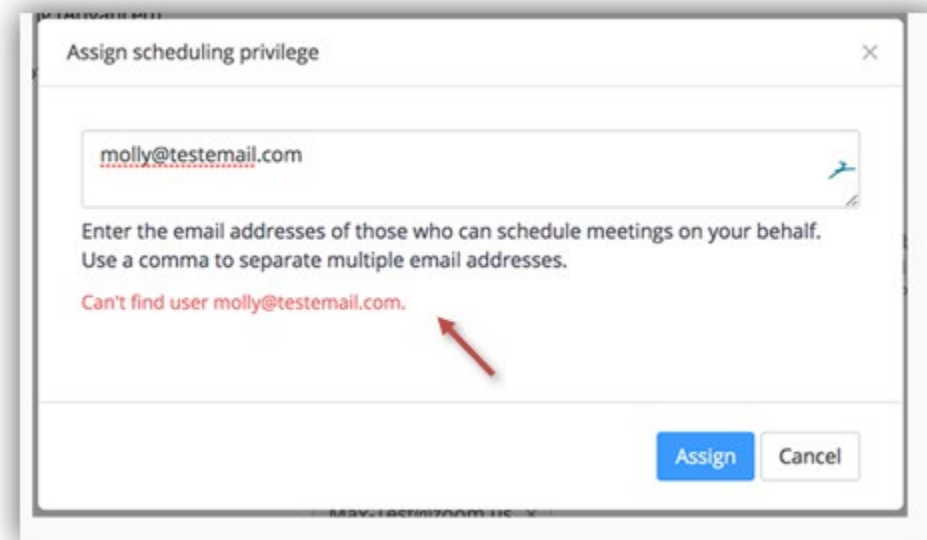
Enter the Coordinators email address in the window and click “Assign”.



Note: If the Coordinator was assigned successfully, they will appear under **Assign Scheduling Privilege** to. However, they will need to sign out of the Zoom desktop client and sign in again before they can schedule on a Specialists behalf.



If scheduling privilege cannot be assigned because the Coordinator is not on your account or is not a licensed user, you will receive an error message similar to the ones below.



Assign scheduling privilege

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

User [redacted] must be a licensed or On-Prem user.

Assign
Cancel

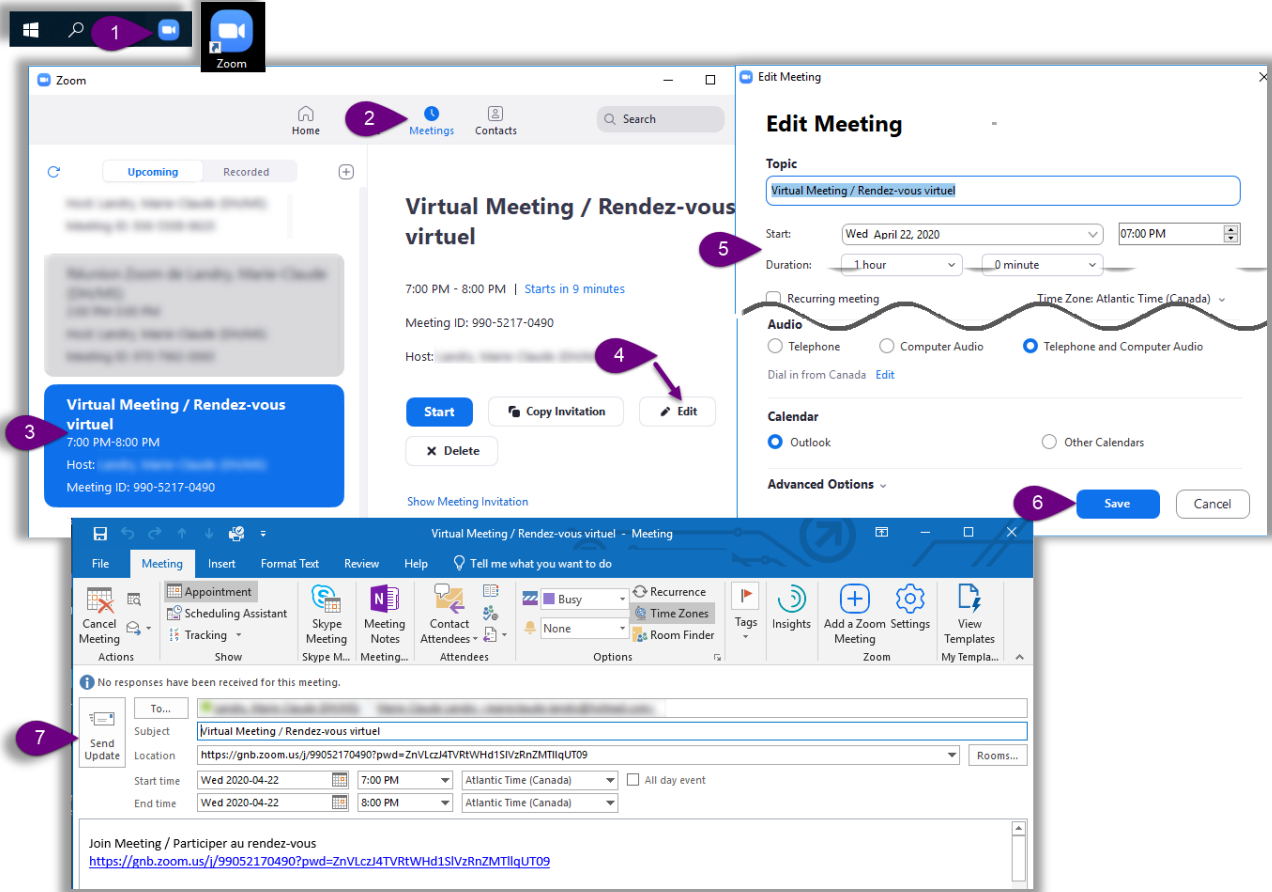
5. HOW TO RESCHEDULE OR CANCEL ZOOM FOR HEALTHCARE VIRTUAL APPOINTMENTS

5.1 How to reschedule or cancel Zoom for Healthcare appointments (Access Outlook outside Citrix)

For users accessing Outlook inside of Citrix, see Section 5.2.

If you use Outlook outside of Citrix and you need to change a scheduled appointment time or date, you will have to update the meeting in your Zoom Desktop application first, then update your Outlook calendar.

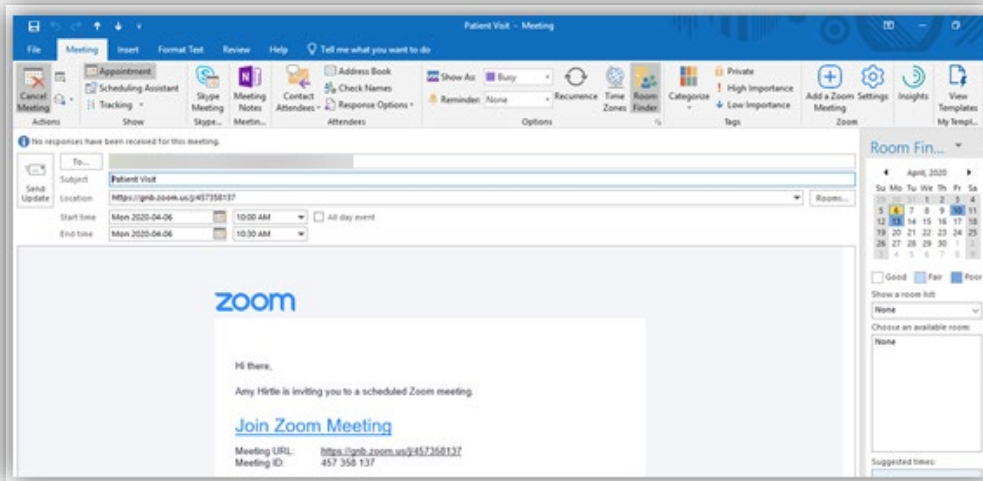
1. Open the Zoom desktop client (from your toolbar or desktop)
2. Click **Meetings** to open the Meetings window.
3. Select the meeting you want to update.
4. Click **Edit**.
5. Update the Meeting information.
6. Click **Save**. The updated meeting information will be copied to your Outlook calendar.
7. Click **Send Update** to send an update to the meeting attendees



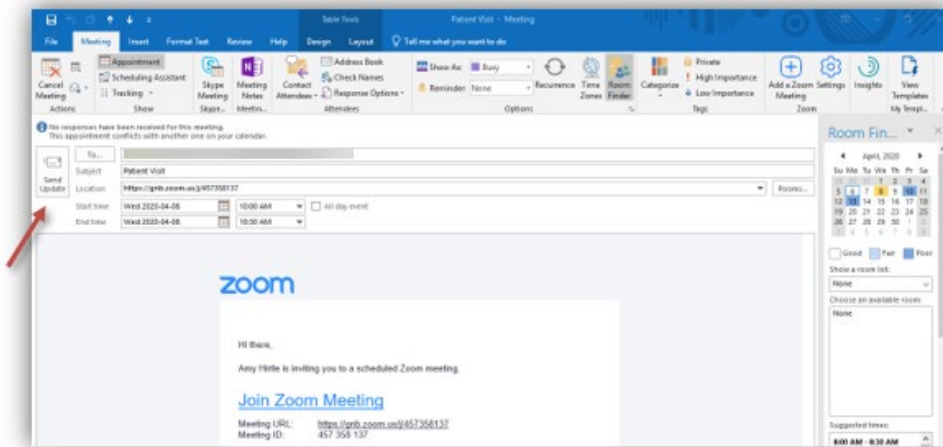
Adding Attendees to Zoom appointments

If you only need to add **attendees** to a scheduled appointment, you can add the attendees and update the meeting in your Outlook calendar. There is no need to update the meeting in the Zoom Desktop application.

To add attendees from your Outlook calendar, simply double click the appointment you would like to update.



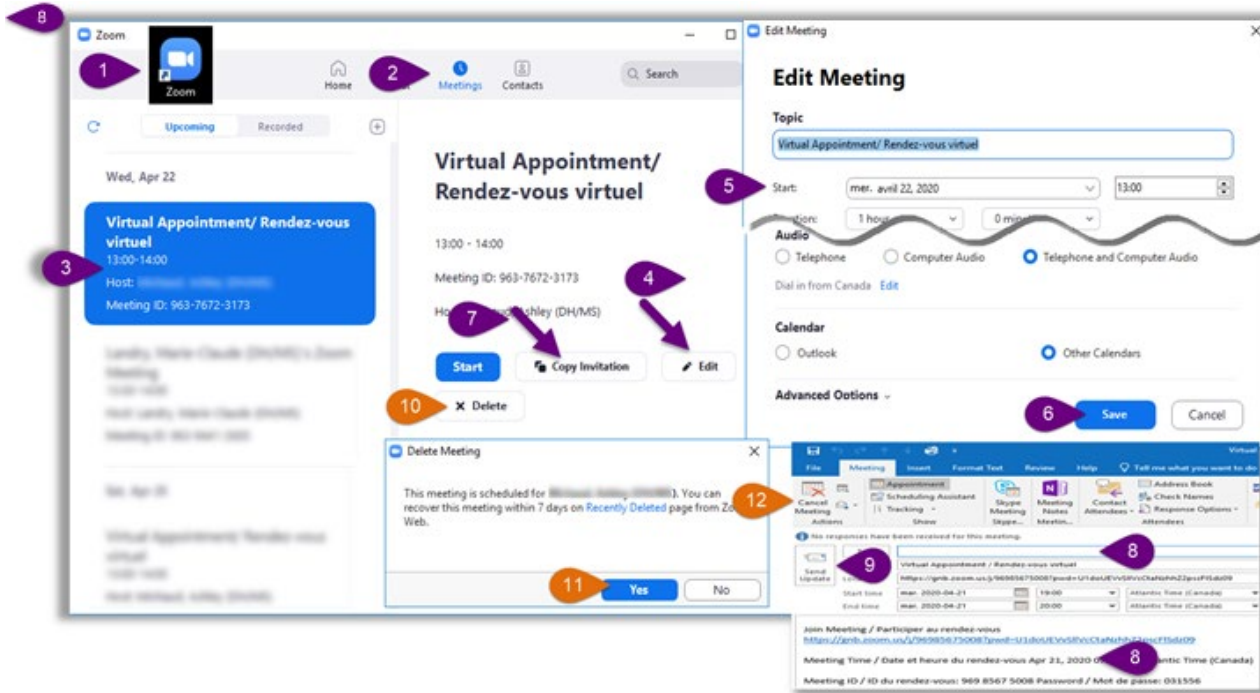
Add attendees and click **“Send Update”** to send the updated meeting notification to the patient or attendees. There is no need to update the Zoom link in the email, as it carries onto the newly scheduled date.



5.2 How to reschedule or cancel Zoom for Healthcare appointments (Access Outlook inside Citrix)

If you [use Outlook in Citrix](#), you will first need to update the meeting in the Zoom desktop application. You will then update the meeting invitation in your Outlook calendar in Citrix and send a new email to the participant.

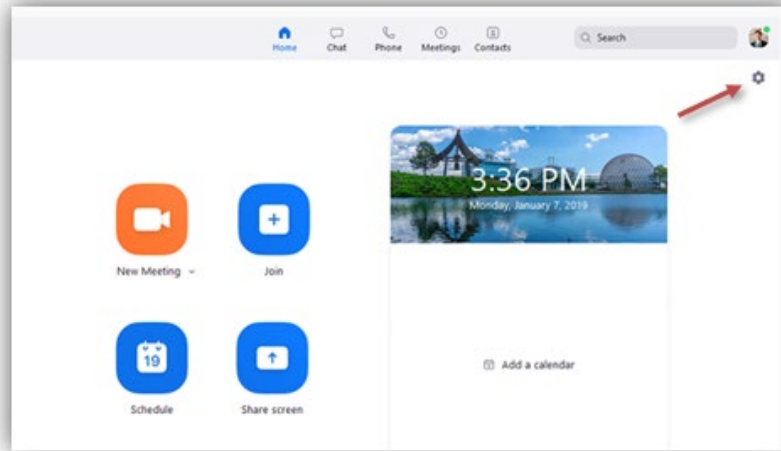
| | |
|---|---|
| <p>Updating an Existing Zoom Meeting (Date & Time)</p> <ol style="list-style-type: none"> 1. Open the Zoom desktop client. 2. Click Meetings. 3. Select the Meeting to update. 4. Click Edit. 5. Update the meeting information. 6. Click Save. 7. Click Copy Invitation. 8. In your scheduling tool (in this example Outlook) find the original invitation, update the Date & Time. Right click in the body of the email and select Paste to paste the updated meeting invitation. 9. Click Send Update to send an update to the meeting invitees. | <p>Cancelling an Existing Zoom Meeting</p> <ol style="list-style-type: none"> 10. Select the meeting you want to delete and Click Delete. 11. A Delete Meeting window will open to confirm the action. Click Yes. 12. In your scheduling tool (in this example Outlook) find the original invitation and click Cancel Meeting and Send Cancellation to send a cancellation email to the meeting invitees. |
|---|---|



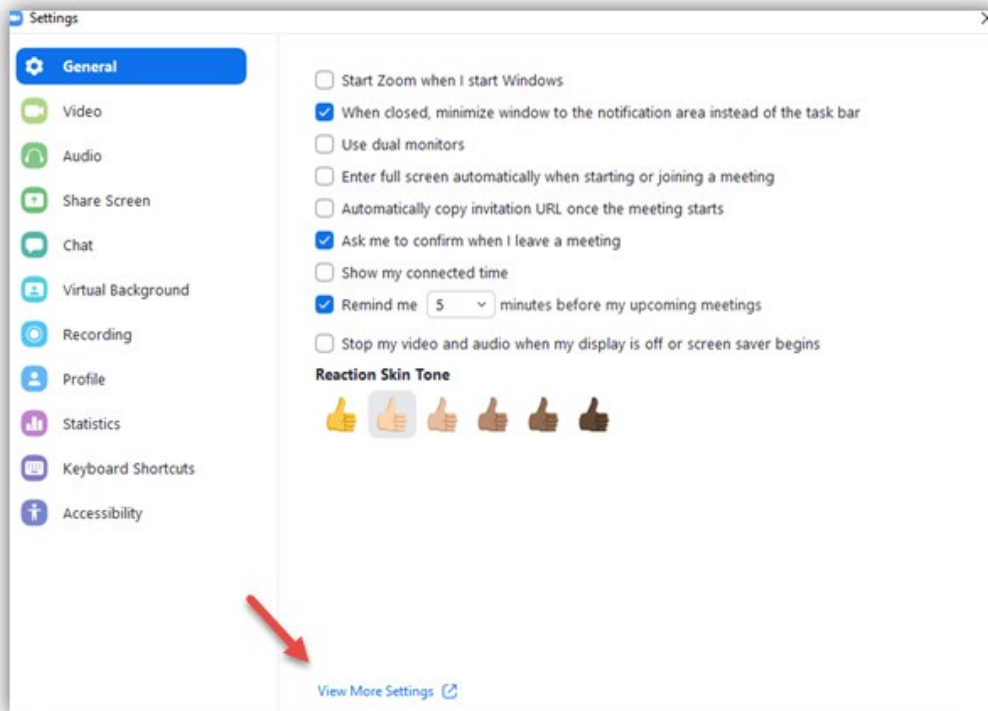
5.3 How to recover deleted Zoom for Healthcare virtual appointments

You can recover deleted meetings for up to one week after it was deleted. If you recover a meeting, invitations, links, and meeting IDs sent prior to deletion will still work.

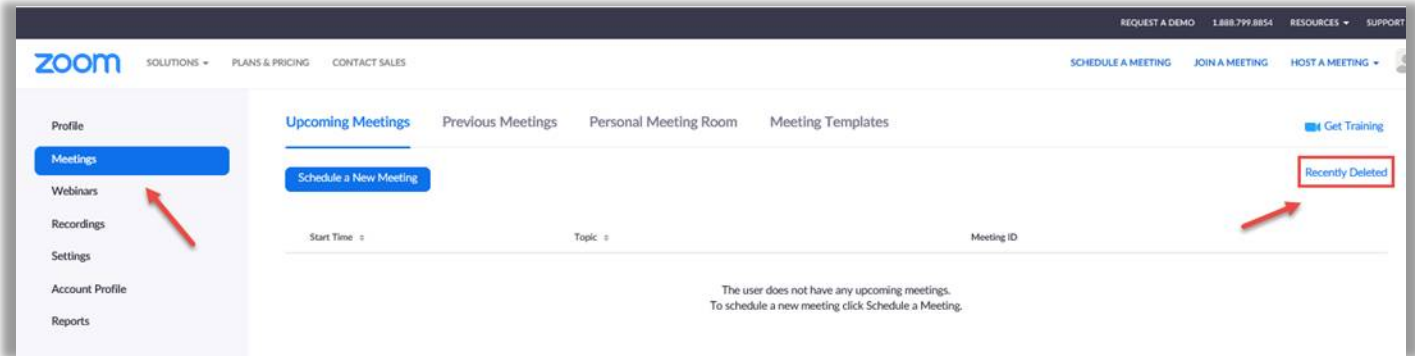
To recover deleted meetings, click the **Settings** cog wheel located at the top right-hand of your screen.



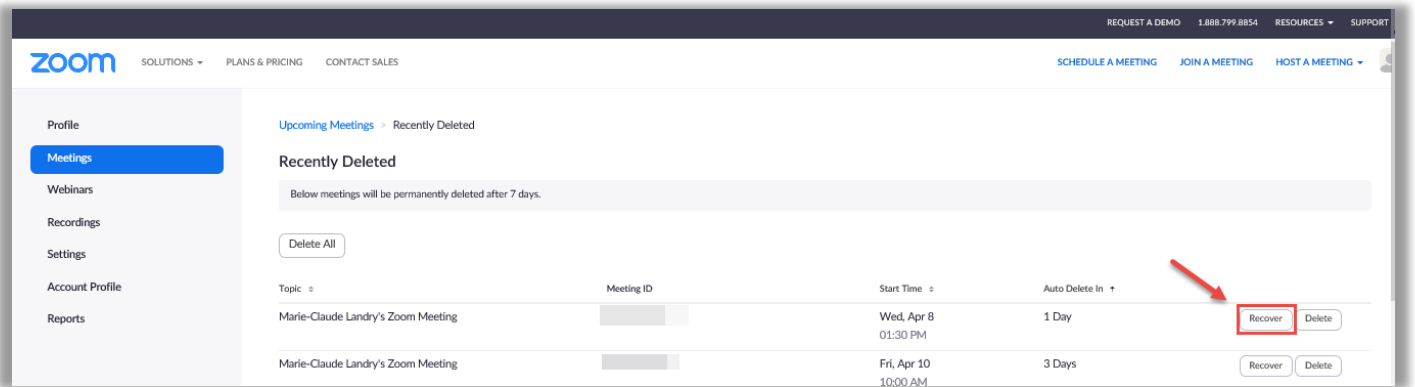
The settings menu appears. Under the General tab, click on **“View More Settings”** located at the bottom of the screen.



A browser window opens directing you to the additional Settings menu. Click **“Meetings”** from the menu on the left and **“Recently Deleted”** on the right.



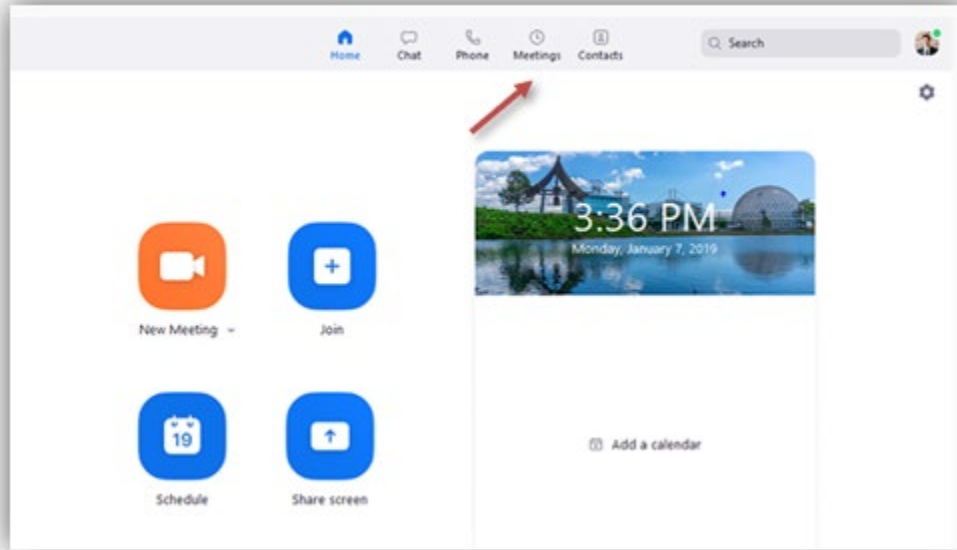
Click **“Recover”** for the meeting you would like to remove from the trash can.



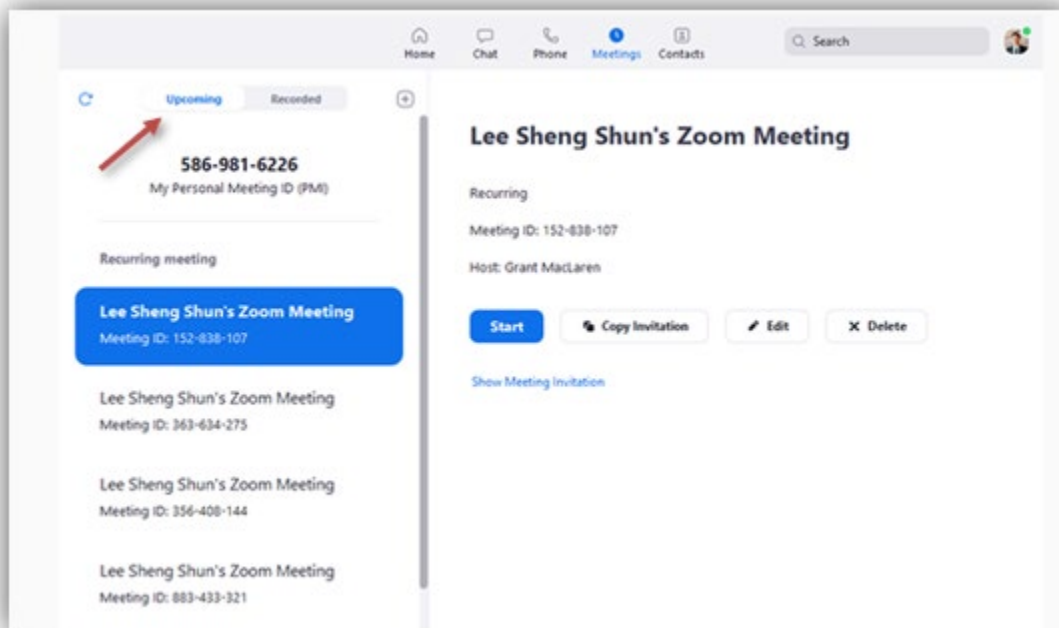
Note: If you permanently deleted a meeting from the trash can or it has been over a week since you deleted your meeting, it cannot be recovered and a new meeting needs to be scheduled.

6. HOW TO VIEW SCHEDULED ZOOM FOR HEALTHCARE VIRTUAL APPOINTMENTS



To view your scheduled appointments, click on the **“Meetings”** tab from the Zoom desktop homepage.



To view, start, edit or delete scheduled meetings, click **“Upcoming”**.



You can click the following options after selecting a scheduled meeting in the left-side panel:

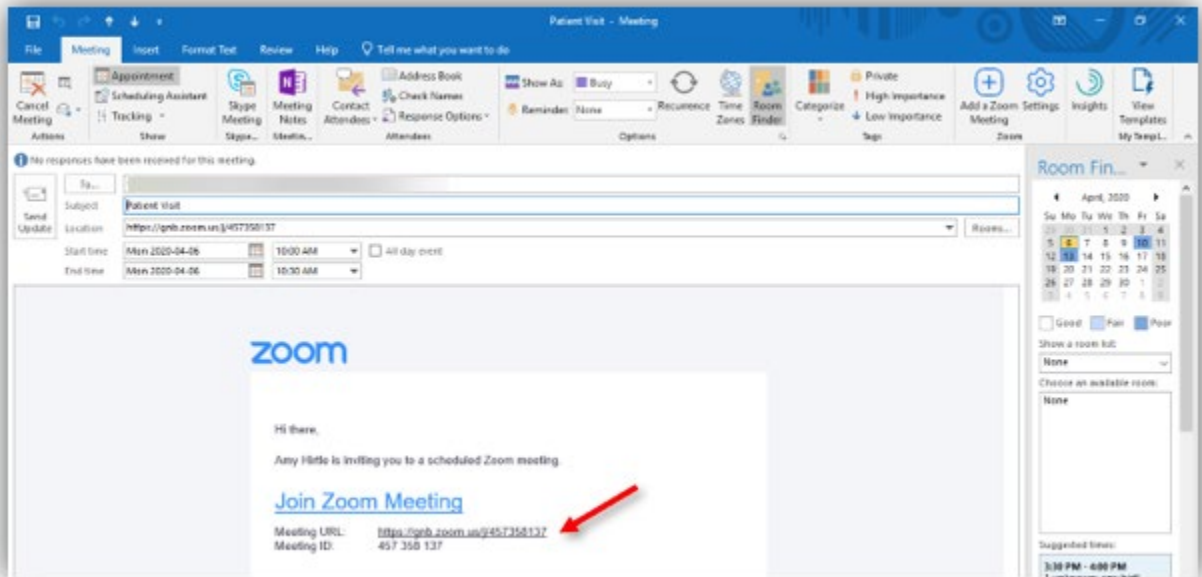
- **Add icon** : Schedule a new meeting.
- **Refresh icon** : Refresh the meeting list if you don't see your scheduled meeting.
- **Start**: Start the scheduled meeting that you have selected in your upcoming meetings.
- **Copy Invitation**: Copy the scheduled meeting's invitation text, allowing you to manually paste into an email, instant messenger etc. Click **Show Meeting Invitation** if you want to view the invitation you're copying.
- **Edit**: Edit the meeting options for your scheduled meeting.
- **Delete**: Permanently delete your scheduled meeting.

7. HOW TO JOIN/CONDUCT ZOOM FOR HEALTHCARE VIRTUAL APPOINTMENTS

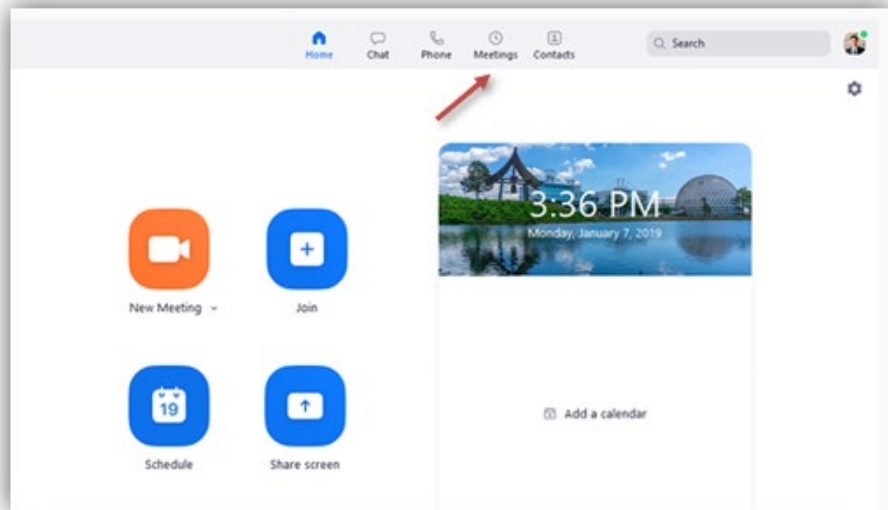
There are 2 ways to join a Zoom for Healthcare meeting:

- If you [use Outlook outside of Citrix](#), you can join/conduct a meeting from your Outlook calendar (see Step 1 below) or from your Zoom Desktop application (see Step 2 below).
- If you [use Outlook inside Citrix](#), you will **ALWAYS** join/conduct a meeting using the Zoom Desktop application (see Step 2 below).

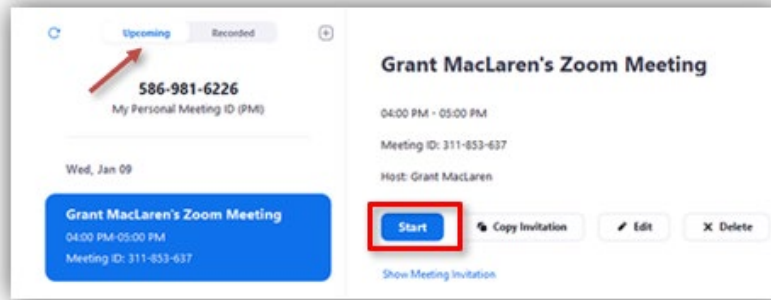
1) Open your Outlook calendar, select the meeting and click the Zoom meeting link.



2) Log in to your Zoom account from your desktop and click “Meetings”.

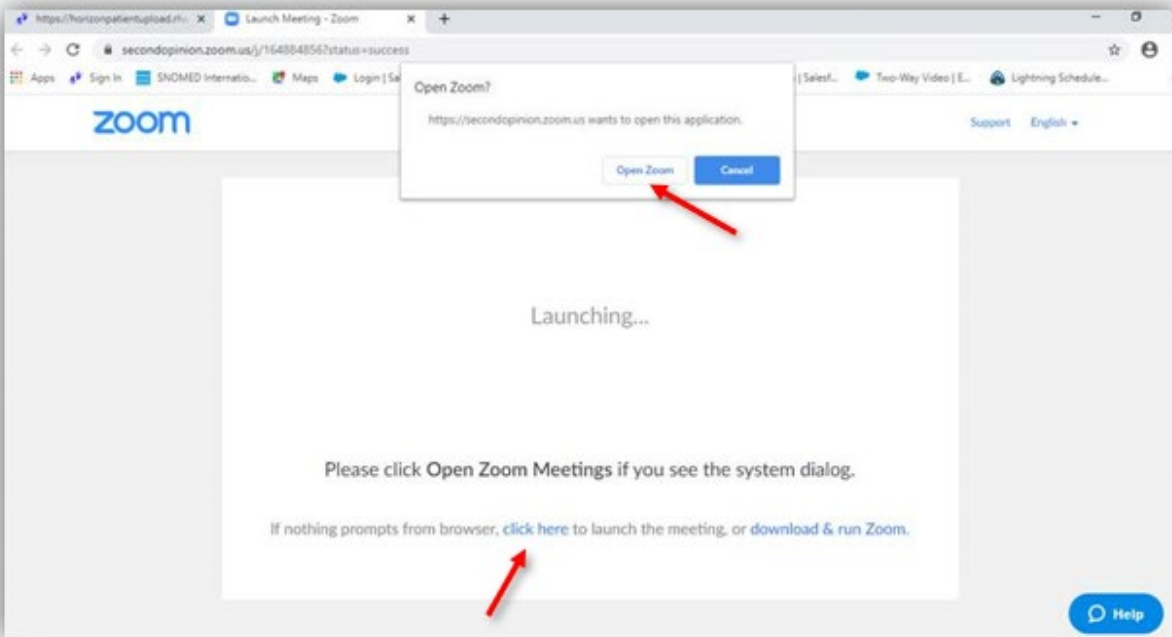


Under the **Upcoming** tab, select the meeting you want to start and click **“Start”**.



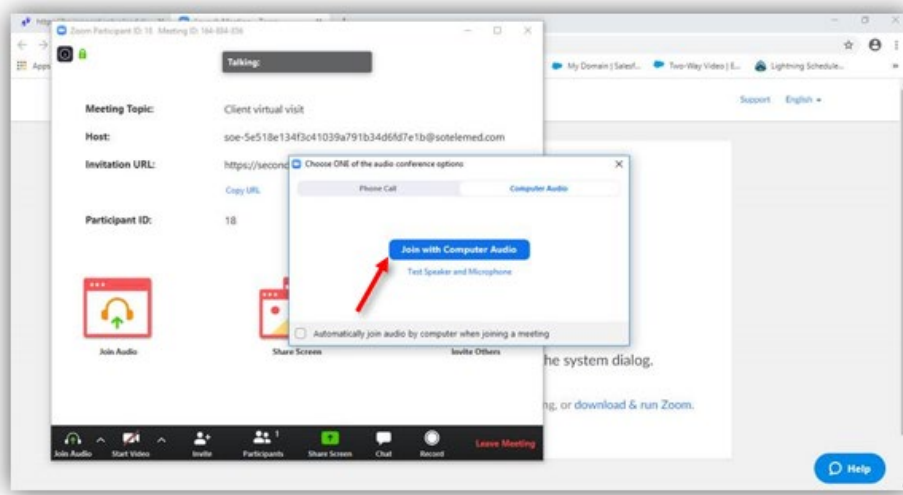
Once a connection is established, you are directed to the Zoom application. From here, click **“Open Zoom”** or you can select **“click here”** to launch your virtual appointment.

Note: This window no longer appears after you have successfully logged in the first time.



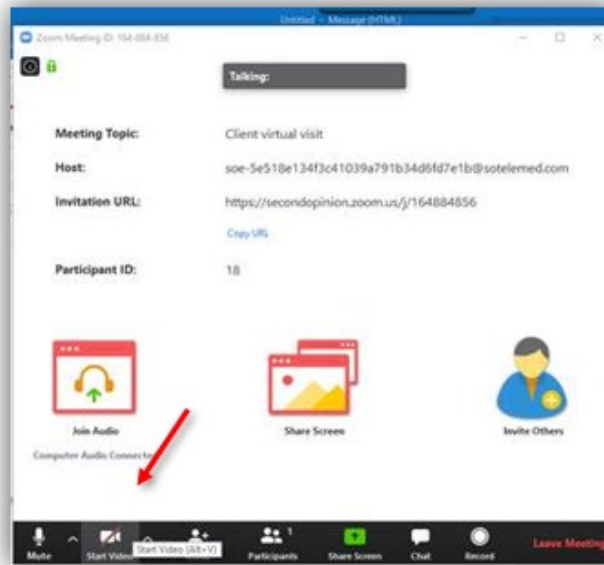
To join the virtual appointment with your device audio, select **“Join with Computer Audio”**.

Note: If you do not see the Zoom meeting screen, minimize any additional meeting windows.



Once you have selected this, you can be immediately heard. If you are the first participant, **“Mute”** your microphone. To begin the session, unmute and select **“Start Video”**.

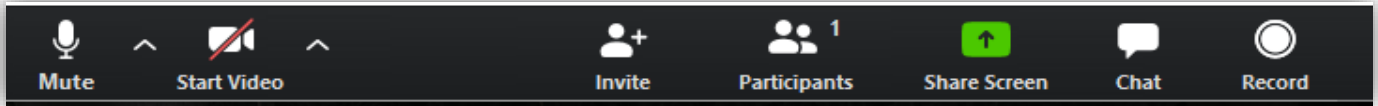
To begin the virtual appointment, select **“Start Video”** from the bottom panel of your screen.



Provided the patient you are connecting to has video capabilities, you are now connected via video conferencing.

Additional Features:

- *Discontinue Video*: To discontinue use of the video conference feature, select “**Stop Video**”. This does not end your session but will simply remove the ability for the patient to view you on video. You will still be audible to them.

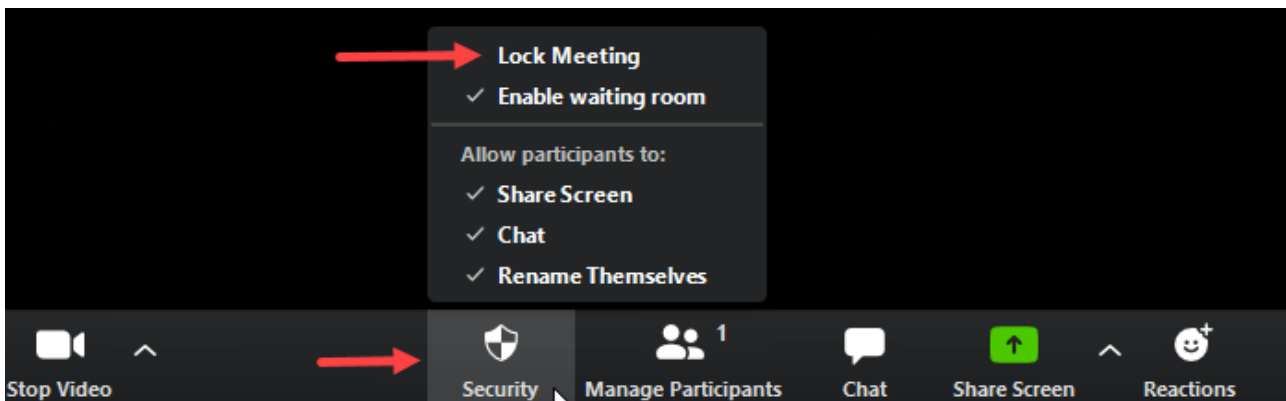


Mute: You can mute your side of the conversation by selecting “**Mute**” on the bottom left hand side of the panel.



Note: You will notice **Record** and **Chat** features that are available in the Zoom application. Due to privacy and security concerns, these features are not to be used.

- *Security*: A Security icon may appear at the bottom of your screen. As best practice, it is recommended to “**Lock Meeting**” when meeting with a client.



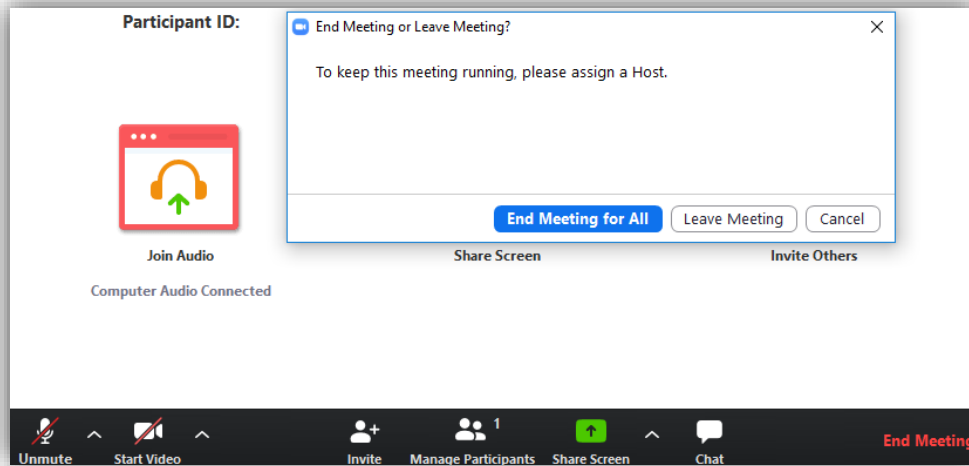
7.1 How to leave or end a Zoom for Healthcare virtual appointment

To leave the virtual meeting, click “**End Meeting**” located at the bottom right hand corner of the screen.



The below prompt appears on your screen to confirm you wish to leave the session. Click **“Leave Meeting”** again to exit the virtual appointment. It is important to complete this step when ending the meeting to ensure conversations are not overheard for patient confidentiality.

Note: The meeting host also has the option to end the meeting for all attendees by clicking **“End Meeting for All”** under **“End Meeting”**.



8. HOW TO SCHEDULE ZOOM FOR HEALTHCARE VIRTUAL APPOINTMENTS USING OUTLOOK (ACCESS OUTLOOK OUTSIDE CITRIX)

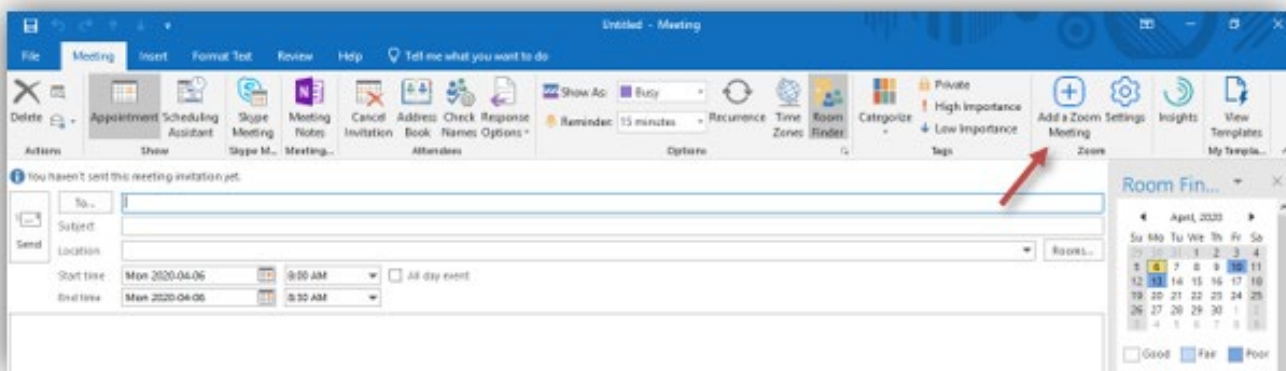
Note: If you are using Outlook from within Citrix, you will ALWAYS schedule and launch meetings from the Zoom desktop application. Please ignore this section.

Using Outlook Desktop Client

To schedule a Zoom virtual appointment using Outlook, open your calendar and click on **“New Meeting”**.

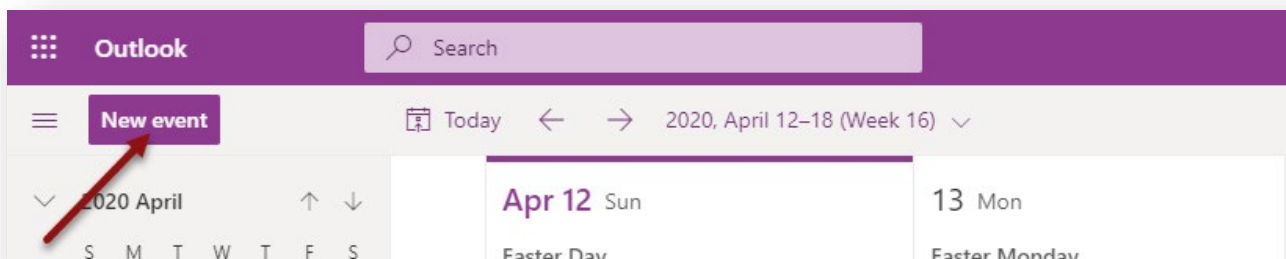


This opens the meeting scheduler. Enter the patients email address, type **“Patient visit”** or **“Virtual visit”** in the *Subject field* and click the **“Add a Zoom Meeting”** icon.

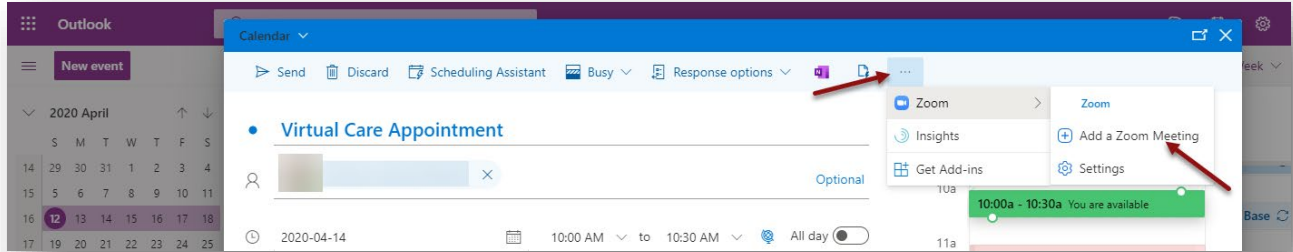


Using Outlook Online and the Zoom Add-On

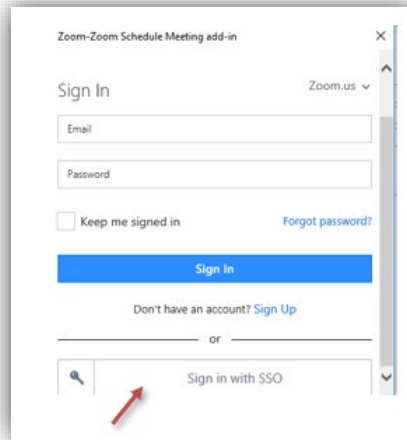
To schedule a Zoom virtual appointment using Outlook Online, open your calendar and click on **“New Event”**.



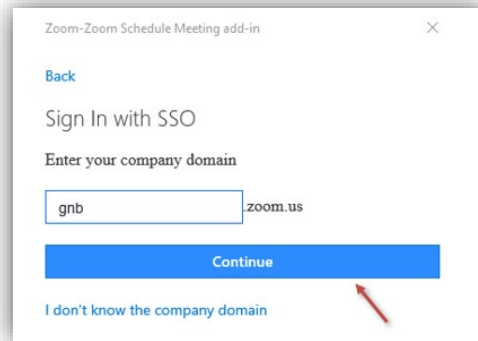
This opens the meeting scheduler. Enter the patients email address, type **“Patient visit”** or **“Virtual care appointment”** in the *Subject field* and click the **...** to open the **“Zoom”** menu and click **“Add a Zoom Meeting”**.



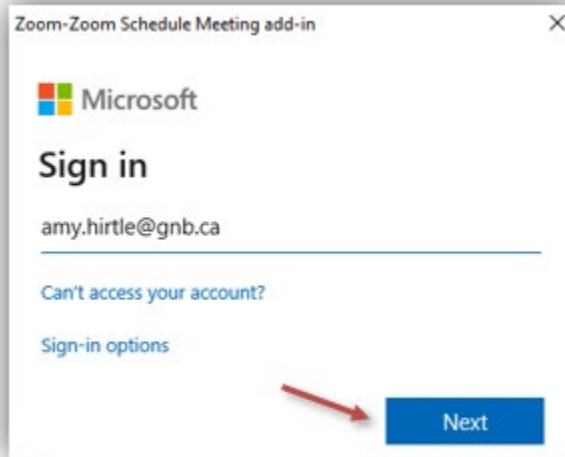
If you are not currently signed into Zoom, you will be directed to log in. Use the scroll bar to scroll down and click **“Sign in with SSO”**.



Type **“gnb”** in the company domain field and click **“Continue”**.

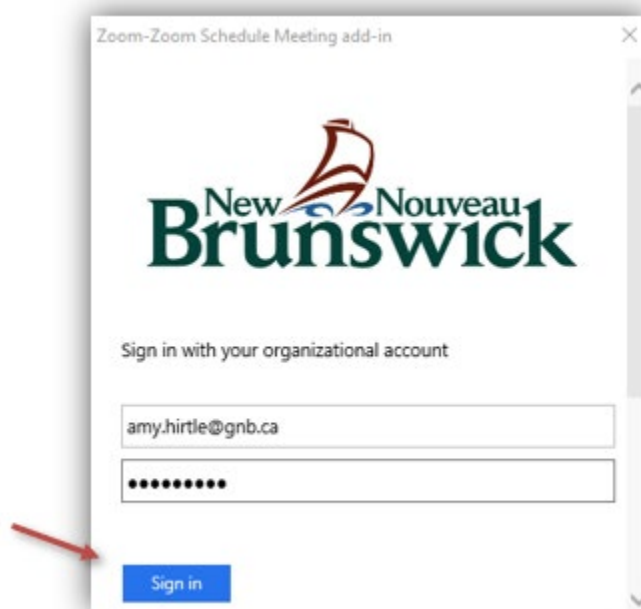


The below prompt will appear. Type your email address (your active directory email) and click “**Next**”.

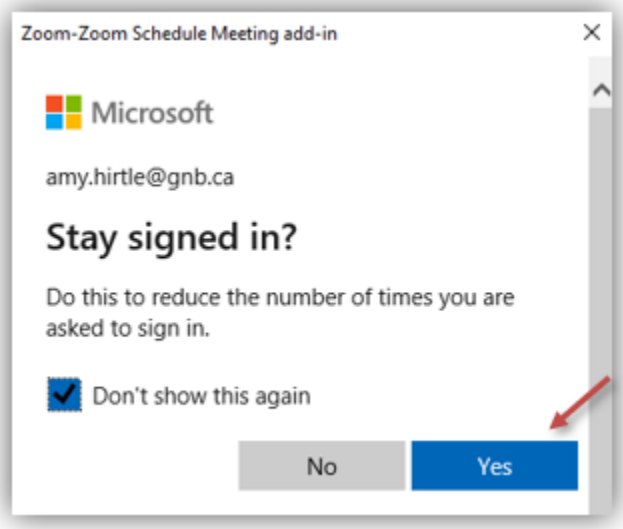


Enter your current active directory password and click “**Sign in**”.

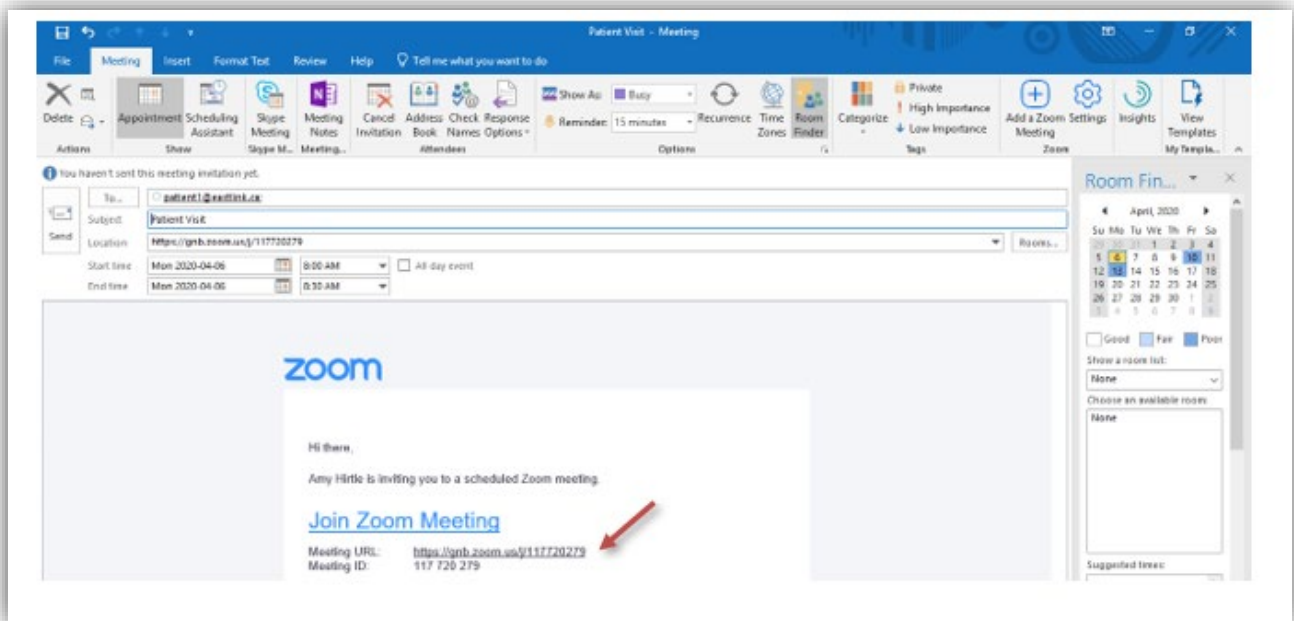
Note: Anytime you update your active directory password, it will sync with the Zoom application automatically and the new password can be used to log in.



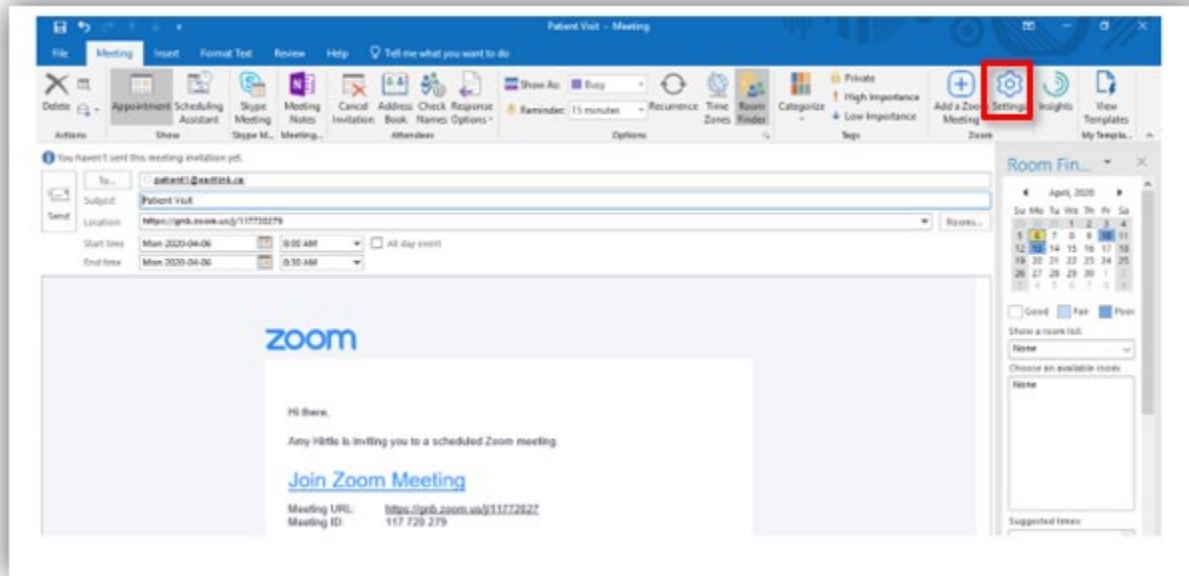
To reduce the number of times you are asked to sign in, select **“Don’t show this again”** and select **“Yes”**.



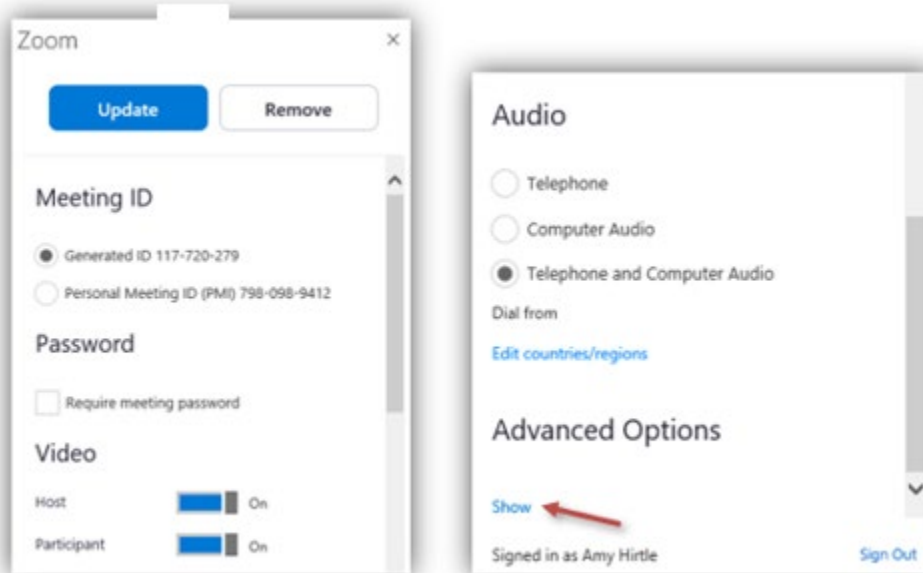
A window will briefly appear advising you are now signed in and the Zoom link is added to the body of the email.



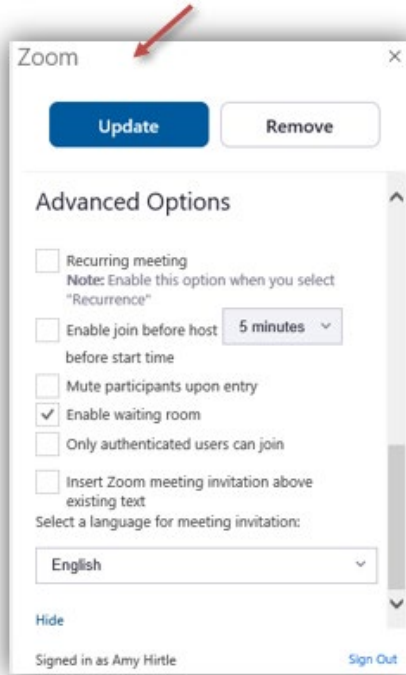
To select your desired settings for the scheduled meeting click the **“Settings”** cog icon next to the Zoom meeting icon.



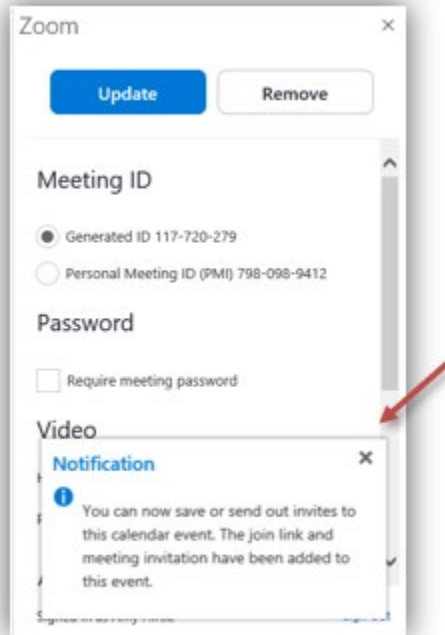
The settings menu will appear for you configure the meeting. To select advanced Zoom meeting options, click **“Show”** under *Advanced Options*.



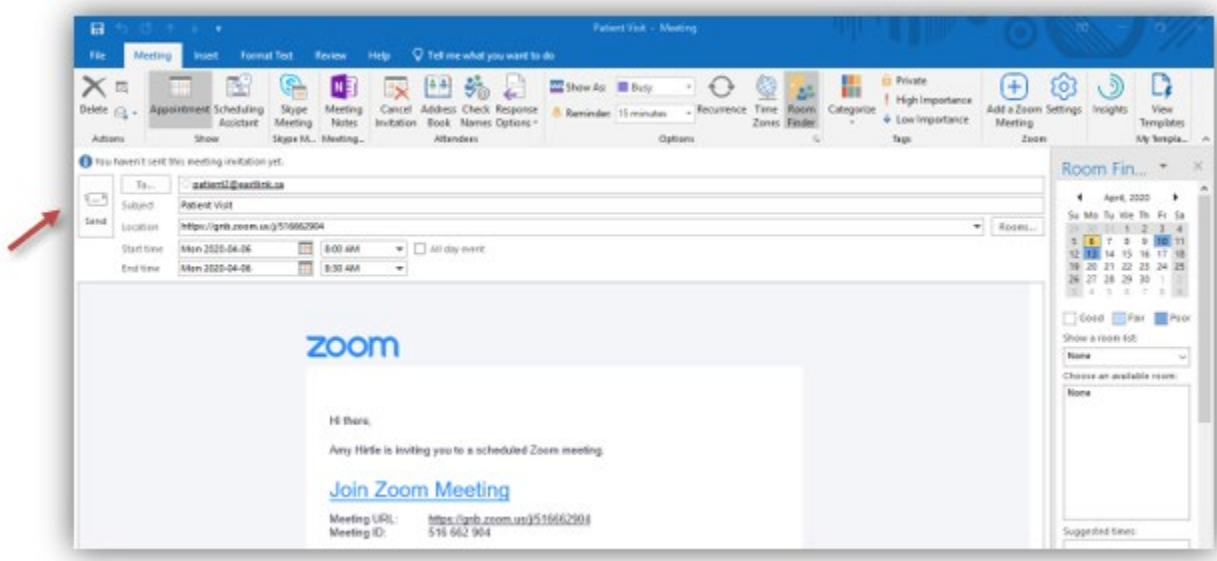
The below menu will appear. Make the necessary changes and click **“Update”**.



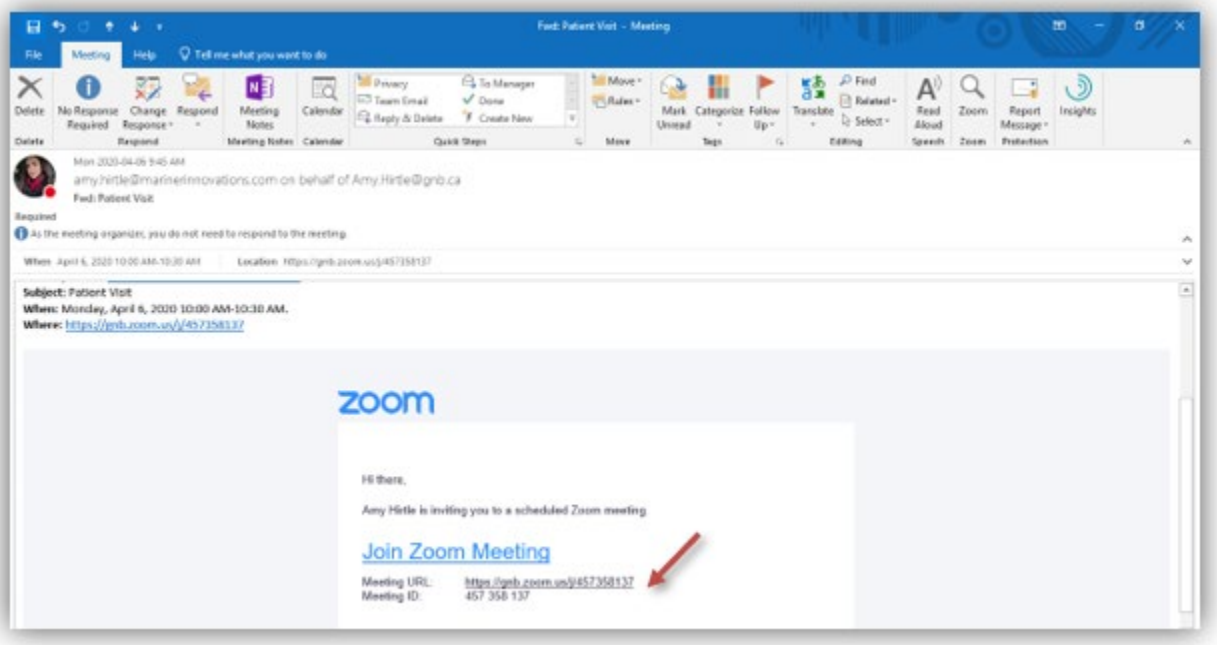
A confirmation message will appear notifying you that the Zoom settings you selected have been saved.



Select **“Send”** to send the Zoom virtual meeting invite to the attendee(s).

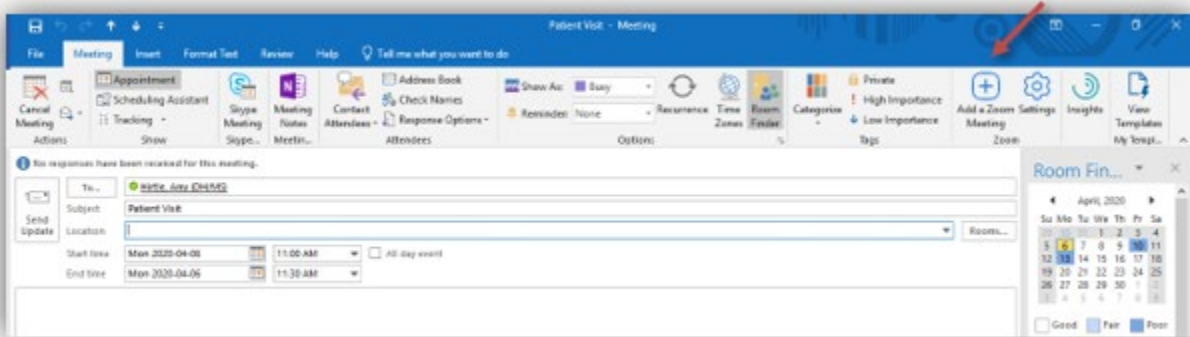


This is a sample of the email notification the patient will receive. The Patient(s) will simply click on the Zoom link to enter the virtual appointment on the scheduled date and time.

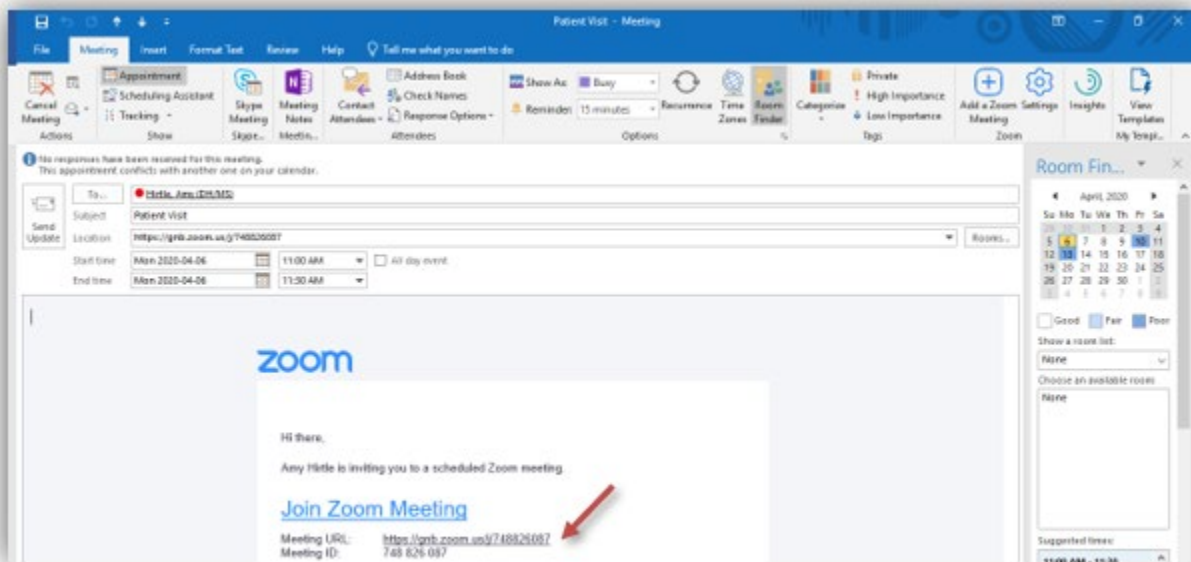


8.1 How to make an existing Outlook meeting a Zoom for Healthcare virtual appointment

To add a Zoom meeting to an existing event, open the existing event in your Outlook calendar. Select “**Add a Zoom Meeting**” to update the event to a Zoom meeting.



The Zoom meeting link populates in the body of the existing meeting. Click “**Send Update**” to re-send the appointment containing the new Zoom link to all attendee(s).

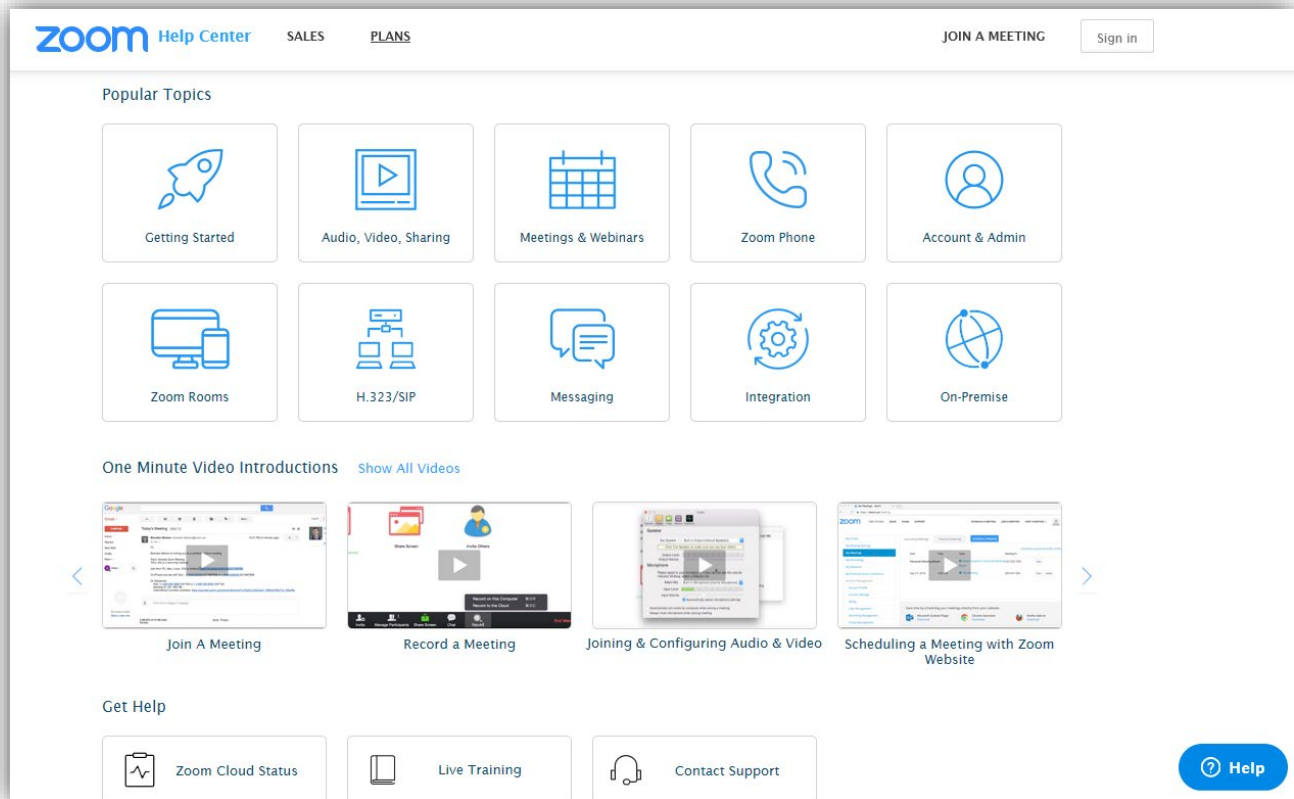


9. SUPPORT AND DOCUMENTATION

9.2 Zoom for Healthcare Support

Zoom offers a wide range of support features: videos, webinars, FAQs, email or live support, and search help capabilities.

You can find Zoom support tools here: <https://support.zoom.us/hc/en-us>



Internal Zoom for Healthcare Support – Provincial Service Desk 1-844-354-4357 or service@snb.ca

9.2 Additional support

Device Support – For device support, continue to contact your current provider (GNB Service Desk or Provincial Service Desk)

Webcam/Headset Support – GNB Service Desk is available for initial troubleshooting with user and will identify if and when Provincial Service Desk support is required.

10. PRIVACY AND SECURITY

Virtual Care Minimum Privacy and Security Guidelines

Virtual care provided through a videoconferencing tool, such as Zoom for Healthcare,¹ involves the collection, use and/or disclosure of personal health information (PHI). This guidance document defines minimum privacy and security requirements that must be followed when providing virtual care.

Healthcare providers are responsible at all times for the following:

- understanding and complying with requirements under the [Personal Health Information Privacy and Access Act](#) (PHIPAA), the [Right to Information and Protection of Privacy Act](#) (RTIPPA), as well as any applicable college, association or regulatory requirements specific to the provider's profession; and
- continuing to meet the professional and ethical requirements that apply to in-person delivery of care.

Virtual Care Client Initial Considerations

- Consider the client and exercise professional judgment to decide whether they are a candidate for virtual care, including, for example, whether the client has the required technology (e.g., computer, mobile device), and is able to use it.
- Document the decision about whether to use virtual care in the client's health record.

Technology considerations

- Ensure that the device you are using to conduct virtual care meetings with your client meets minimum security requirements.
- The Government of New Brunswick is providing Zoom for Healthcare as a videoconferencing tool to support the urgent need for virtual care due to the COVID-19 crisis. Zoom for Healthcare is easy to use, reliable, and provides a healthcare-specific option. Recently, Zoom for Healthcare has been highlighted in the media, and we want to assure you that we have investigated it cautiously. Bearing in mind the potential risks that arise with any videoconferencing solution, we have carefully considered and are comfortable with the measures included in the healthcare-specific version of Zoom for Healthcare to protect user privacy. We will also continue to monitor for privacy and security issues on an ongoing basis.

Pre-session

- Offer virtual care as a new option for the patient, briefly explain how it works, and discuss any questions or concerns with the client.
- Obtain informed verbal consent from the client (or their substitute decision-maker, if applicable) for the use of videoconferencing for virtual care:
- Have a back-up plan in case of a crisis situation (e.g., emergency contact information, safety plan, Crisis Line, directions to the nearest ER, etc.), and be prepared in case the virtual care session is interrupted.
- Remember that requirements for privacy and confidentiality continue to apply to virtual care and be sure to hold virtual care sessions in an environment that is professional and private.

¹ These requirements apply to Zoom for Healthcare or any other videoconferencing tool used for virtual care.

Scheduling a Session

- Limit the amount of personal information used when scheduling a meeting to the least amount required; do not include any PHI in a scheduling tool, email or other notification sent to the client.
- Never use a personal meeting ID or equivalent permanent identifier as this creates a risk that an unauthorized person could access the session.²
- Ensure that the “waiting room”, or equivalent functionality that requires you to admit each participant, is turned on for every session you schedule.³
- Never share meeting IDs, passwords, or any other information about your session on social media.

At the start of each care virtual care session

- Confirm the client’s identity following your standard practices for confirming identity at an in-person visit.
- Ask about the client’s location and confirm that the session will not be overseen or overheard by anyone without the client’s authorization.
- If other individuals are in attendance, confirm the identity of those individuals and obtain the client’s consent for their participation in the virtual care session, and be sure to document this information in the client’s record.
- Do not record the session. This feature should have been disabled within the videoconferencing tool by your account administrator, you must not use any recording functionality that may be available to you.
- Confirm that the client is not recording the session, either within the videoconferencing tool, or by some other means (e.g., mobile phone, voice recorder, etc.)

Privacy and Security Incidents

- Follow your existing policies and procedures for reporting any privacy or security incidents that may occur when providing virtual care.

² For example, each Zoom for Healthcare user is assigned a personal meeting ID, which functions as a permanent meeting room that is always accessible using the same meeting ID and link. Never use your personal meeting ID to schedule a virtual care session.

³ For more information about Zoom waiting rooms, see: Zoom, [Secure Your Meetings with Zoom Waiting Rooms](#), Feb. 14, 2020.

11. APPENDIX

11.1 Virtual Visit Guide for Patients

A quick guide to your virtual appointment


Virtual appointments are like regular appointments. The only difference is that you can see and talk to your health care provider from the convenience of your home.

To begin, you need an **internet connection**, **email account**, and a **computer** (with a webcam, speaker, and microphone) or a **mobile device** (tablet or smart phone).

There are 3 steps to get ready for your first virtual appointment:

- 1) Receive your **email/text** invitation
- 2) Check device **requirements**, then run a video and audio **test**
- 3) **Join** your virtual appointment

⊕ Before your Virtual Appointment

| | |
|--|--|
| <p>1 Open your email invitation. Your email invitation contains:</p> <ul style="list-style-type: none"> • The date and time for your virtual appointment • A link to do a test run • A link to join your virtual visit • A link to access help information | <p>2 Check device requirements. Run a video and audio test.</p> <p>Device Requirements for Zoom for Healthcare Desktop Client</p> <p>Device Requirements for Mobile devices</p> <p>Join a Test Meeting</p> <div style="border: 1px solid #add8e6; padding: 5px; text-align: center;"> <p>Getting Started with Zoom for Healthcare</p> <p>On a computer: use the Google Chrome web browser.</p> <p>On a mobile device: download the Zoom app from the Google Play Store or Apple App Store.</p> </div> |
| <p>3 Join your Virtual Appointment</p> <p>Open your invitation email shortly before the scheduled time.</p> <p>Click the Join Zoom Meeting link.</p> <p>Join audio and start your video.</p> <p>You will be placed in a virtual waiting room until the healthcare provider is ready to meet.</p> <p>When using a smart-phone or tablet, make sure it is fully charged and connected to Wi-Fi to avoid data charges.</p> | <div style="border: 1px solid #ffa500; padding: 5px;"> <p>Join Zoom Meeting https://nrb.zoom.us/j/447917239</p>  </div> |

★ Think About Privacy and Security

- Ensure that your location is private and that your appointment will not be overseen or overheard by unauthorized participants.
- Avoid using a public Wi-Fi connection.
- Do not record the session.
- Never share session IDs, passwords, invitation links or any other information about your session on social media or elsewhere.

11.2 Email Invitation Template to Patients

Health Care Providers may choose to use this template when they send virtual visit appointment invitations to their patients. Copy and paste the following text into an email. Enter the relevant information in the fields below labelled in **green**.

SUBJECT LINE: Virtual Appointment with <Practitioner Name>

EMAIL BODY:

<Insert Zoom Meeting Invitation>

We want to respect and protect the confidentiality and privacy of this meeting, and respectfully ask that you do not share, forward, or post on social media your Virtual Care meeting link and/or ID.

Try the [Test Meeting](#) in advance to check your Audio and Video settings and ensure your virtual visit is successful.

What do you need?

- Smartphone/Tablet & free Zoom app (download from Google Play or Apple App Store) or Computer/Laptop (with webcam/microphone) & Internet Browser
 - High-speed Internet or 4G LTE connection
- *IMPORTANT:** You are responsible for any charges related to your internet data usage. *If you are using data on a mobile device (instead of a wireless Wi-Fi connection) be aware that video streams can require significant data.*

To help you prepare for your virtual visit and to ensure you receive the best care, we highly recommend that you carefully read the document(s) attached to this email:

- 1) **Virtual Visit Guide for Patients**
- 2) **Verbal Consent Guidelines**

If you need to reschedule your virtual appointment, please contact our office as soon as possible:

[phone number]
[email address]

If you are having difficulty joining, please call <Add the practitioners phone number> and/or access the online resources found in the [Zoom Help Centre](#); [Zoom Video Tutorials](#) and [Live Training](#).

[Closing Greeting].
[Sender Email Signature]

PRIVACY AND SECURITY STATEMENT – This email might contain some personal information which will be only used to facilitate scheduling my Virtual Appointment. Although safeguards and best practices were put in place to protect the security of my personal health information, no electronic system is completely secure and must be used with a secure internet connection, in a private location.

CONFIDENTIALITY NOTICE – The information contained in this e-mail may be confidential, privileged, or otherwise protected from disclosure. It is intended only for the use of the authorized individual(s) as indicated in the email message. Any unauthorized viewing, disclosure, copying, distribution or taking of any action based on the contents of this material is strictly prohibited. If you have received this e-mail in error, please notify the sender as a courtesy and delete the email and its attachments immediately. Thank you for your cooperation.

11.3 Verbal Consent Guidelines: Client

Health Care Providers should outline and explain the consent guidelines to their clients as a means of verbal consent. Once verbal consent is confirmed, update the client record to reflect the consent from the client to be provided virtual care through the use of Zoom for Healthcare.

Client consent:

The client consents to the use of videoconferencing (Zoom for Healthcare) as a means of electronic virtual care so that they can continue to receive care from their provider. The client understands and agrees to the following:

- My provider may need to use my personal information to facilitate virtual care, including such things as my name, email address, and telephone number.
- Although my provider will ensure safeguards and best practices are put in place to protect the security of my personal health information, I recognize that no electronic system is completely secure.
- I am responsible for ensuring that any devices I use to participate in virtual care are secure, that I have a secure internet connection, and that I am in a private location.
- I will work with my provider to ensure a back-up plan in case of emergency or if virtual care is interrupted.
- I will not record virtual care session.
- If I wish to withdraw my consent, I can do so by communicating this to my provider at any time.