

# Virtual Care Zoom for Healthcare Clinical Case Conference

Zoom for Healthcare has been approved to use for clinical case conferences.

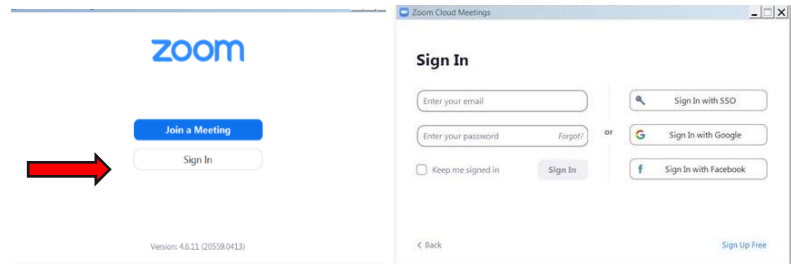
## Requirements:

- The meeting host must have a Zoom for Healthcare account.
- Participants joining the meeting do not need a Zoom for Healthcare account, but it is mandatory for anyone conducting clinical provider to patient appointments outside of case conferencing to have a Zoom for Healthcare account.
- Two meetings by the same host cannot occur simultaneously. These will need to be scheduled by two different hosts (scheduling privileges can be assigned to one account by multiple accounts).
- Participants require audio capabilities on their device. Zoom telephone dial-in numbers should not be used because of significant long distance charges.

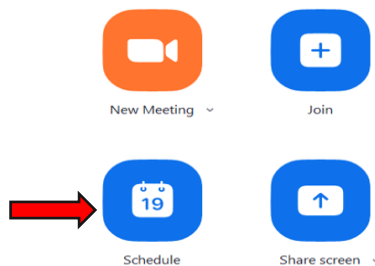
## Creating a Meeting

### “Coordinate/Organize” the meeting:

1. Sign in to your Zoom account.



2. Click on “Schedule”.



3. Enter the Topic (Name of the Group), Date, Time, and Duration.

4. Ensure:

- “Meeting ID” is set to Generate Automatically
- “Password” is required
- “Video” for host is ‘On’
- “Audio” is set to ‘Computer Audio’
- “Calendar” is set to ‘Outlook’
- “Advanced Options” are set as appropriate (i.e. enable waiting room, mute participants on entry, etc.)

5. Click “Schedule”. An Outlook meeting appointment window will open.

6. Enter all of your participants’ email addresses to the outlook meeting invite in the “To” field:

- Only send the meeting ID to meeting participants.
- Do not post the link publically or in shared spaces.
- Do not include any patient information in the meeting invite.

7. Copy and paste the following information into the body of the email:

- Do not share the Meeting ID with anyone
- Participate in a private location where patient information is not overheard.
- The Instant Messaging feature is not approved for sharing patient information.
- Recording and screenshots are not permitted.
- Please note, when you enter the meeting, you will be placed in the Waiting Room and then be admitted to the meeting by the meeting host

How to Join Your Zoom Meeting:

- [How to join using a Computer \(Mac or Windows\)](#)
- How to Join using a mobile device/tablet:
  - [Apple \(iOS\)](#) – click here to [download iOS Zoom Cloud Meetings app](#)
  - [Android](#) – click here to [download Android Zoom Cloud Meetings app](#)
  - [Blackberry](#) – click here to [download Blackberry Zoom Cloud Meetings app](#)

Please ensure your software and apps have the latest security updates.

8. Send the meeting invitation from your Outlook account (Zoom appointment set-up is complete).

### Managing Your Meeting

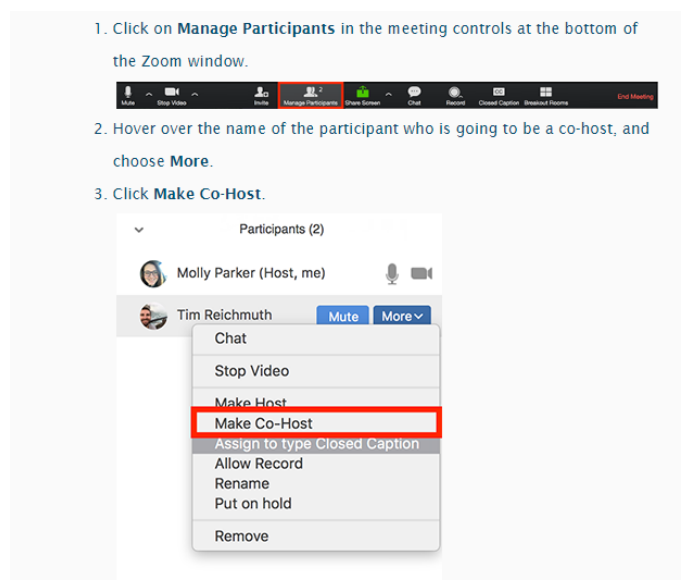
- The host enters into the meeting.
- Please note all other participants will be in the waiting room and need to be admitted by the host.
- Upon entry, the host clicks “Manage Participants” at the bottom of their screen. A list of all participants who have joined the Waiting Room will appear to the right of your screen.
- The host then admits participants into the meeting from the waiting room. This can be done by clicking “admit” next to each name or the host can admit all participants from the waiting room at once by clicking “Admit All” at the top of the list.
- The host also has the ability to remove anyone from the meeting or put them back in the waiting room.
- The host will hear a chime anytime someone enters the waiting room and the meeting.
- If a participant does not have their full name identified when in the waiting room, the meeting host **must complete a roll call at the beginning of the clinical case conference as well as monitor the “Manage Participant” section throughout the clinical case conference** to ensure that all participants present are part of the care team.

### Hosting/Co-Hosting a Meeting

- The host of a Zoom for Healthcare meeting can give co-host privileges to other meeting attendees so that they are able to screen share.
  - The host can also take away co-host privileges.
  - Participants with no Zoom for Healthcare license can still be given co-host privileges. This does not make the meeting less secure.

### Assigning Co-Hosts

- After admitting participants into the meeting, be sure to assign your co-hosts following the instructions below. Multiple co-hosts can be assigned.



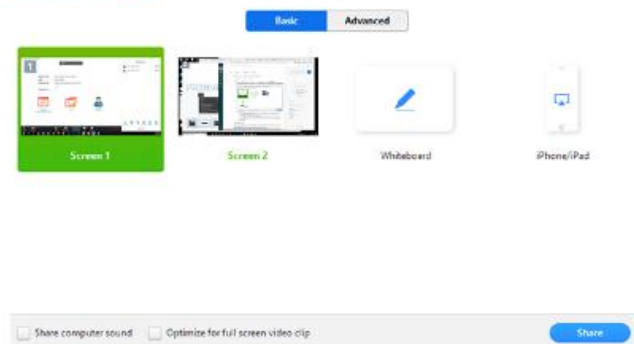
## Screen Sharing

- Ensure the document/application being shared is open on your desktop. You will be able to select that item specifically to share, preventing the other participants from seeing anything else that may be open on your computer. See below for screening sharing instructions.

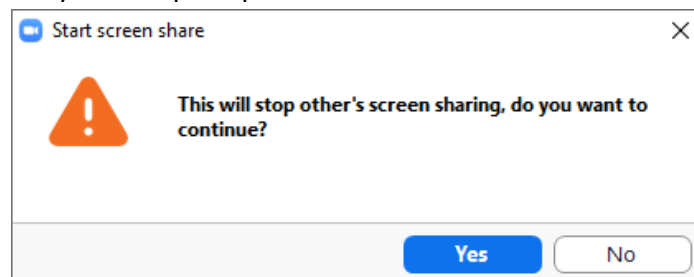
1. Click the **Share Screen** button located in your meeting controls.



2. Select the screen you want to share. You can also choose an individual application that is already open on your computer, the desktop, a **whiteboard**, or an **iPhone/iPad**.



- For another co-host to begin sharing, they must click “Share Screen” at the bottom of their screen. They will be prompted with:



- Select Yes. This will override the current screen sharing.
- The host and co-host are the only participants that can screen share.