

Zoom for Healthcare

Instructions for Inpatient Units & ED

This resource provides guidance and instructions for NSHA/IWK staff on inpatient units and emergency departments (ED) to enable virtual companionship visits for their patients with friends/family and clinical appointments using Zoom for Healthcare.

NSHA/IWK iPads are available on inpatient units and in emergency departments (ED). The iPads are securely configured to protect patient privacy and to limit access to applications/features other than the intended use.

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Training & Requirements

All staff must review the [Guidelines for Health Care Providers \(HCP\) - Zoom for Healthcare](#) which highlight key requirements related to patient privacy, consent, safety, etc.

All **resources** indicated below, as well as links to **training** videos for inpatient units, may be accessed on the [NSHA Zoom for Healthcare – Inpatient Resources](#) website.

To **request an iPad** for virtual companionship visits or to **request a shared email**, please submit a ticket in [IT Self Service](#).

For more information about requesting a **Zoom license** visit the [NSHA Zoom for Healthcare website](#). If you **require assistance** or for more information please contact VirtualCare@nshealth.ca.

Additional Key Points

- Meetings created under the **same** Zoom license **cannot** happen at the same time.
- Zoom for Healthcare licenses should be associated with a ‘shared email address’ for the unit (e.g. YRH4East@nshealth.ca). Each license should be designated for **one iPad**, which is clearly labelled to indicate the **Zoom license** (e.g. ‘YRH4East’ for YRH4East@nshealth.ca).
- A **unique Zoom meeting ID** must be used for each virtual companionship visit; however, a meeting ID may be **reused with the same patient** for as long as needed.
- iPads should not be used within 1 meter from any medical device, as with any mobile device.

- Zoom meetings **do not expire for 30 days** after they are scheduled and can be used any time during that 30 days. Each time a meeting ID is used, the 30 day expiration period renews.

How Do Virtual Companionship Visits Work?

Virtual companionship visits enable patients to connect with family/friends using Zoom.

A staff member(s) on the unit should be designated to manage the unit Zoom account. This person is responsible to create Zoom meetings **in advance** for virtual companionship visits and maintain a **List of Zoom Meetings** using the [Zoom Meeting List Template](#).

The **List of Zoom Meetings** should be printed and posted on the inpatient units for staff to reference, and updated regularly. Unit staff will refer to the posted list to provide patients and their family/friends a unique Meeting ID and password to visit using Zoom.

Meeting IDs are crossed off the list as they are used; however, if the meeting ID will be **reused for the same patient** for future companionship visits, the staff member will instead **write the patient's name** next to the Meeting ID in the space provided and will not cross it off.

Staff will **provide written resources** to the patient to introduce them to using Zoom and to explain the risks and benefits, and then **obtain verbal informed consent** to use Zoom.

Staff will use the iPad to join the Zoom meeting for the patient, and then provide them with the device. When the patient has finished their visit, unit staff retrieve the device, erase any saved data and clean as directed.

Refer to the instructions below and FAQ at the end of this document for more details and step-by-step guidance about this process.

How Do Virtual Clinical Appointments Work?

Virtual appointments enable HCPs to connect with inpatients using Zoom.

If a **HCP has a Zoom license**, unit staff obtain the meeting ID and password from the HCP. Staff then follow the same process for a companionship visit, to enable the patient to attend their appointment virtually using Zoom on an iPad.

If a **HCP does not have a Zoom license**, staff may use a Meeting ID and password from the posted **list of Zoom Meetings** on the unit. The meeting ID must be **unique** and cannot be the same Meeting ID already in use by that patient for virtual companionship visits.

How to Create a Zoom Meeting

The meeting settings indicated below are primarily intended for **virtual companionship visits** with family/friends for inpatient units or in ED. It is preferred that HCPs conducting virtual appointments create Zoom meetings using their own Zoom license.

1. **Sign in** to the [Zoom Web Portal](#) using the unit Zoom account.
2. Click **Meetings** then click, **Schedule a New Meeting**.
3. **Populate the fields** with the settings below. These settings should populate by default, but please verify the settings are correct.

Meeting Settings:

- **Topic:** 'My Meeting'
 - **Description:** Leave this text box empty.
 - **When:** Current date and time.
This setting will not impact when the patient is to start their meeting.
 - **Duration:** 1 hours and 0 minutes.
This setting will not impact the ability to use the meeting ID outside of the scheduled 1 hour because the meeting does not expire for 30 days.
 - **Time Zone:** Halifax
 - **Recurring meeting:** Unchecked
 - **Registration:** Unchecked
 - ****Schedule For:** Select the appropriate host/license.
****Note:** *This option will only be visible if you have been assigned scheduling privileges on behalf of another account. Please see FAQ below for more information about this feature.*
 - **Meeting ID:** Generate Automatically.
It is important to ensure a unique Meeting ID is generated for patient privacy. DO NOT select Personal Meeting ID.
 - **Meeting Password:** Accept the randomly generated password or set a password yourself. The password does not need to be strong; a password of '12345' would be sufficient (e.g. Med4E could be used for all meeting IDs on that unit).
 - **Video:** On
 - **Audio:** On
 - **Meeting Options:**
 - **Enable join before host:** Checked
 - **Mute Participants upon entry:** Unchecked
 - **Enable waiting room:** Unchecked
 - **Only authenticated users can join:** Unchecked
 - **Breakout Room pre-assign:** Unchecked
 - **Alternative Hosts:** Leave this text box empty.
4. Click the blue **Save** button to save the meeting.
 5. You will now see a **confirmation page** summarizing your meeting information.
 6. The **first** time you create a meeting, Click **Save as Meeting Template** at the bottom of this confirmation page to create and name a template for these settings and enhance your workflow in Zoom as you create future meetings.



The next time you schedule a new meeting, you will now have a **new option** in the meeting settings to choose this template from a dropdown list.

7. The meeting will now be saved in your list of **Upcoming Meetings**. You can view the meeting ID and password for the meeting(s) you created from the Upcoming Meetings link within the Zoom web portal.


To view at a **later time**, meetings will appear under **Previous Meetings**.

How to Update the List of Zoom Meetings

1. Open the [Zoom Meeting List Template](#) in Excel.
2. Enter your unit's **Zoom license** at the top of the template.

If you are responsible for several units/iPads, **create a new spreadsheet/tab for each Zoom license**. For more information about scheduling for several units/iPads please see the FAQ section below.

3. **Copy and paste** new meeting IDs and passwords from Zoom into the corresponding columns and enter the date.

|  | | Zoom for Healthcare | |
|--|------------|----------------------------|---------------------------------------|
| Site: | YRH | Zoom License: | <input type="text" value="YRH4East"/> |
| REMINDER: Meeting IDs booked on the <u>same</u> Zoom License <u>cannot happen at the same time</u>. | | | |
| Date | Meeting ID | Password | Patient Name |
| 14-Apr | 123456789 | 12345 | |
| | | | |

4. **Print and post** the **List of Zoom Meetings** on the unit(s).
5. **Collect posted list(s)** from the unit(s) on a regular basis and update as needed:
 - i. Delete **used** Meeting IDs (they will be crossed out by unit staff)
 - ii. Add Patient Names (if indicated by unit staff)
 - iii. Add new Meeting IDs**Reminder:** unused meeting IDs may be carried forward for up to **30 days**
6. Print and repost on the unit.

How to Facilitate a Virtual Companionship Visit/Clinical Appointment

Upon request, inpatient unit staff will follow the steps below to facilitate a patient companionship visit/clinical appointment:

1. Provide the following documents to the patient in advance:
 - [Zoom for Healthcare Patient Welcome](#)
 - [Zoom for Health Care Patient Information Guide](#)
2. Obtain **informed verbal consent** as per the [Guidelines for Health Care Providers \(HCP\) - Zoom for Healthcare](#)
3. Obtain a Zoom meeting ID and password from the posted **List of Zoom Meetings** on the unit.

NOTE: *If your unit has more than one iPad, ensure the license indicated at the top of the **List of Zoom Meetings** matches the **label** on the iPad.*

4. Cross out (strike through) the Meeting ID on the list to indicate it has been used.
If the Meeting ID will be **reused** by the **same patient** for future virtual companionship visits, do **not** strike through. Record the **patient's name** on the list in the space provided.
5. Provide the **Meeting ID and password** as needed to the patient/family/friends. If they require assistance, please see the FAQ below for guidance and resources.
6. **How to Join the Zoom Meeting:**
 - i. Unlock the NSHA/IWK iPad
 - ii. Open the **Zoom** app
 - iii. Tap **Join a Meeting**
 - iv. Select OK, if the messages "**Zoom**" would like access to the Camera or "**Zoom**" would like access to the Microphone appears. (You should only need to do this the first time you use Zoom)
 - v. Enter the Meeting ID (do not enter the patient's name in the display name field)
 - vi. Tap **Join**
 - vii. Enter the **password** when prompted.
 - viii. Tap **Join with Video**
 - ix. Select **Call using Internet Audio**
7. **Give the iPad** to the patient.
8. **Retrieve the iPad** when the visit is finished.
9. Check and clear any **saved data**:
If device has only been used for Zoom:
 - Open the **Zoom** app
 - Tap **Join**
 - Tap the Meeting ID field
 - Tap '**clear history**' to **delete** any stored meeting IDs and display names.If the device has been used for **other purposes** and personal patient information may have been entered, follow the [instructions to erase and reactivate](#) the iPad.
10. **Clean** the device according to [NSHA IPAC guidelines](#) before distributing to the next patient.
11. **Document** the visit/appointment as per the [Guidelines for Health Care Providers \(HCP\) - Zoom for Healthcare](#).

Need Help?

For **technical support** using an NSHA/IWK managed device, please call the IT Service Help Desk. You may also visit the Zoom help centre at <http://support.zoom.us>.

If **family or friends** are having issues connecting, please refer them to the step by step 'How to Join a Zoom Meeting' resources which are available at www.nshealth.ca/virtual-care or the Zoom help center at <http://support.zoom.us>. (See FAQ below for more information)

FAQ

My unit has more than one iPad, how should we use them?

Units with **more than one** iPad/Zoom license must consider that meetings booked under the **same** Zoom license **cannot** happen at the same time. To reduce the chance of this occurring, units are encouraged to designate **one Zoom license** for **each iPad** and ensure the iPads are **clearly labelled** with the Zoom license name (e.g. label the iPad 'YRH4East' for the license YRH4East@nshealth.ca). You may also wish to designate an iPad for a set number of patient rooms to avoid confusion (e.g. beds 1-14 use one iPad, while beds 15-30 use another iPad.)

What happens if a patient wants to use their own device?

Patients may use their own device and it will not affect the security of the visit. However, Zoom meetings booked under the **same** Zoom license **cannot** happen at the same time, regardless of which device is used. Patients should be advised the guest wifi may not be adequate to support video calls and may need to use their own data. Patients will not be reimbursed for data overage charges.

If you require an additional Zoom license to accommodate individuals using their own devices, you will need to request another shared email address and then request another Zoom license. Please contact VirtualCare@nshealth.ca if you require assistance.

How many appointments should I set up at once?

Staff may create as many meetings in advance as needed for a given period. This period may vary based on your unit workflow. For example, staff may wish to create meetings in advance for the next two weeks, or for the next month. There is no limit on the number of appointments you can schedule for a given day.

What should I do if a patient moves to a different unit?

The patient should be given a new Meeting ID associated with the Zoom license on the new unit. The old Meeting ID should be deleted or will expire in 30 days.

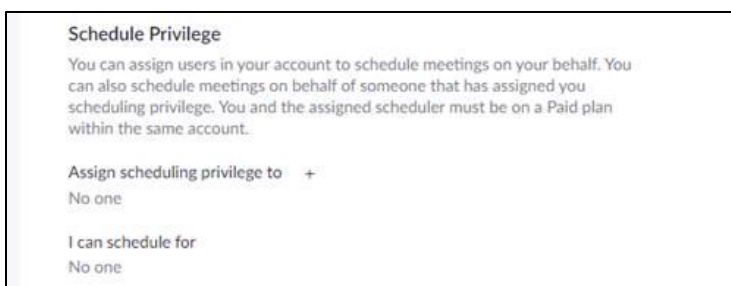
What if I want to transfer my iPad to another area (site/unit)?

Call the IT helpdesk to update the iPad location and Zoom license if you want to transfer the iPad to another unit/site permanently.

How do I easily schedule for multiple Zoom accounts?

You can assign scheduling privileges for multiple Zoom accounts, to one Zoom account. Login to the [Zoom web portal](#) with each account you want to schedule **on behalf of**.

Click on '**Settings**', and scroll to the bottom of the page to the '**Schedule Privilege**' section. Click the '+' and enter the email address for the zoom account that you want to **manage** all the scheduling (e.g. IWKnicu1@iwk.nshealth.ca).



Repeat this step for each Zoom account you want to schedule on behalf of until all scheduling privileges have been assigned.

Once this is complete, you will now have an additional dropdown menu option when you schedule a meeting, to schedule on behalf of the other accounts.

How do Family/Friends join a Zoom meeting?

Family and friends **do not** need to create a **Zoom account** however, they will need to **download the app** or desktop program depending on the device they use.

Family and friends can use either a smartphone, tablet or a personal computer with a video camera and a microphone. Their device needs to be connected to the internet, Wi-Fi or cellular data. If using a desktop computer, they will need a web cam, microphone and speakers or headset.

The links below provide step by step resources which are available on the public www.nshealth.ca/virtual-care website for families and friends to join a Zoom meeting.

- [Mac](#) (.pdf)
- [PC](#) (.pdf)
- [iPhone](#) (.pdf)
- [Android](#) (.pdf)

IMPORTANT: Individuals are responsible for any charges related to their internet data usage using their own personal device. *If using data on a personal device (instead of Wi-Fi) be aware that video streams can require significant data.*