Zoom for Healthcare
Checklist for Health Care Providers

Initial Offer of Virtual Appointment to Patient

✓ Provide the patient the option to attend their appointment virtually with no travel required.

✓ Explain that it will allow them to see, hear and talk on their device from a location of their choice and the Health Care Provider (HCP) will be able to see, hear, and talk to them from their office.

✓ Explain the appointment would be done using a secure, web-based program called Zoom for Healthcare.

✓ Ask if they have the technical requirements needed for Zoom for Healthcare:

- Smartphone/tablet & Free Zoom app (download from Google Play or Apple App Store) OR Computer/laptop & Internet Browser
- Headphones OR microphone/speakers
- Webcam OR built-in video camera
- High-speed Internet OR 4G LTE connection

   IMPORTANT: Patients are responsible for any charges related to their internet data usage. If patients are using data on a mobile device (instead of a wireless "Wi-Fi" connection) they should be aware that video streams require significant data.

✓ If the patient does not have the technical requirements, they will not be able to do their appointment virtually. The patient should be redirected back to their care provider or offered another option.

✓ If the patient does have the technical requirements, ask if they are interested in attending their appointment this way.

✓ If the patient **is interested**:
- Ask the patient for verbal consent to communicate via email
- Obtain patient email address;
- Provide the patient with an appointment date and time;
- Explain to the patient that they will receive an email that will include:
  - A link to their Zoom for Healthcare virtual appointment. Follow the instructions in the email and test their device.
  - 'Patient Information Guide – Zoom for Healthcare' (benefits, risks, privacy)
  - 'Tips for Patients-Virtual Appointments' (room and camera setup)

✓ Ask the patient if they have any questions.

Create the Virtual Appointment

✓ Login to Zoom for Healthcare and create the appointment. (See Zoom Training information: Starting the Zoom Desktop Client and scheduling meetings.

✓ Include in your email invitation to patients:
  - Text from the 'HCP email template to patients' and
  - Zoom appointment link

✓ Ensure no patient identifiers are noted in the Topic/Subject line or body of the appointment request/email. (e.g., Topic: Virtual Appointment with <Patient Initials>)

✓ If this is the **first** Zoom for Healthcare appointment for the patient, attach the two patient resources:
  - 'Patient Information Guide – Zoom for Healthcare' (benefits, risks, privacy)
  - 'Patient Tips – Virtual appointments' (room and camera setup)

✓ Schedule the patient as per usual clinic processes

Join the Virtual Appointment:

✓ Open Zoom for Healthcare and login to the conference with the patient. Or click on the link in your calendar to launch Zoom for Healthcare.

✓ Ask the patient if they can **hear and see** you.

✓ Verify patient identity via the **two client identifier** and ask the patient to show you their **MSI** card or read the number off of the card at the start of the visit.

✓ Ask the patient if they are in a **private location** (note current address for emergency response if needed).

✓ Ask the patient if there is **anyone else in the room** with them.

✓ Ensure all participants (e.g. family, friends, interpreter) are identified and the patient provides **verbal consent to sharing of personal health information** (PHI) with all **present** in the virtual appointment. Do not proceed if you are not able to identify and determine appropriateness of all participants in the virtual appointment.

✓ Discuss options to reschedule if the technology fails and **make a plan** (note phone number).

✓ Request permission to contact patient's **next of kin (NOK)** or alternate support person if needed.

✓ Advise the patient that the appointment will **not be recorded** and no pictures will be taken by either the patient or the HCP.
  - Note: Patients have been advised in the resource 'Patient Tips – Virtual appointments' to discuss with the HCP if they wish to record.

✓ Advise the patient that **if the virtual appointment does not meet their, or the HCP, needs** this will be discussed and other arrangements will be made.

✓ Ask the patient if they have any **questions**.

✓ Ask the patient if they are **comfortable** and are **ready to start** the virtual appointment.

End the Virtual Appointment:

✓ Ask the patient how they felt about doing their appointment virtually.

✓ Ask the patient if they want to attend their next appointment (if required) virtually.

- If the patient **is not interested**, they should be redirected back to their primary health care provider and offered another option.
- If the patient **is interested**, advise them that they will receive an email invitation for their next virtual appointment

✓ Thank the patient, say goodbye and leave the virtual appointment.

✓ Ensure patients are registered

✓ Ensure all necessary items are documented on the patient's health record

- This was a virtual appointment using Zoom for Healthcare
- The patient's location (home, work place, etc.)
- Informed consent obtained
- Summarize any relevant communication via video or chat
- All participants in attendance
- Any incidents that impacted the delivery of care.
- Any significant technical issues

✓ Distribute copies of the documentation/report to:

- All referring health care providers (e.g., GP, clinical team, etc.)
- Patient health record at provider site

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