VIRTUAL CARE

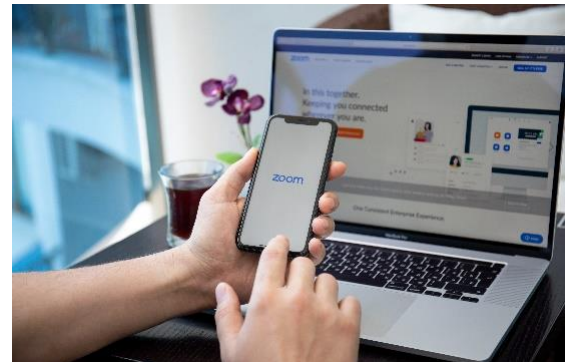**DTO** Doctors Technology Office
A GPSC initiative

ZOOM FOR HEALTHCARE
Quick Start Guide for Physicians & MOAs

Overview

ZOOM for Healthcare is a cloud-based video conferencing software for conducting virtual health visits currently offered by Doctors Technology Office (DTO) in partnership with Provincial Health Services Authority's (PHSA) Office of Virtual Health. It is NOT recommended to use other versions of ZOOM for providing patient care because they do not offer adequate security measures to meet Canadian data privacy regulations. Review ZOOM for Healthcare section on the PHSA website for more information.

ZOOM for Healthcare accounts can be obtained free-of-charge for one year. To apply, complete the PHSA Office of Virtual Health application form: https://bcvh-ZOOM.phsa.ca.

This guide describes how private clinics and community health providers can quickly start conducting virtual visits using the ZOOM for Healthcare account obtained via PHSA.

Doctors Technology Office (DTO) is a neutral body and does not endorse or promote any specific solution or tool.

There are a variety of tools that health providers are encouraged to choose from based on their unique needs.

Contact DTO to explore other options.

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Poster for Virtual Visits Workflow
ZOOM for Healthcare (PHSA Account)

1 Book The Virtual Appointment

- Use the current method of booking appointments.

- Discuss with a patient virtual visit process. Ensure you have patient's email address and current phone number. Follow clinic's policy on patient consent.

- Provide patient with handouts. See ZOOM-related examples listed in this guide Overview section.

- Email patient an invitation with the appointment date and time, a ZOOM meeting link, and instructions. See a template provided in the Booking Virtual Appointments section in this guide.

2 Start Zoom Meeting
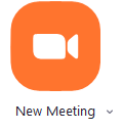
New Meeting

- Use ZOOM Personal Meeting Room (PMI) as your online exam room to provide virtual visits booked in a row or just one appointment.

- To start virtual visits in your PMI, click **Home** from the main menu and select **New Meeting**. You will become a meeting host. See detailed instructions.

- Before you start, see DTO video tutorial Using ZOOM for Healthcare for Virtual Visits: Preparing Your Workstation.

3 Manage the Waiting Room

- After logging in, patients (meeting participants) will stay in the waiting room until you are ready to see them.

- Click **See Waiting Room** or **Manage Participants** to view patients waiting. You can send them a message if you are running late. See Starting a Video Visit in this guide.

4 Admit Patient to The Visit

- Once you are ready for the next patient, click **Admit** next to the patient's name in the Waiting Room.

- This starts the video session with this patient.

- You might need to verify the patient name based on your appointment schedule. See the Starting a Virtual Visit section.

5 Conduct The Virtual Visit

- Ensure your patient is in the private space and that you can see and hear each other.

- Review the Conducting a Virtual Visit section or DTO's video tutorial Using ZOOM for Healthcare: Conducting Virtual Visits for more details.

6 End The Visit

- Ensure that you have a secure way to transfer documents with patients, labs and pharmacies.

- To end the visit, hover your mouse cursor over the patient's name and click on the **More** button. From the drop-down menu select **Remove**. See the Ending a Virtual Visit section.

For your next visit, stay in your meeting and admit a new patient from the waiting room.

Instructions for Using ZOOM for Healthcare

Before You Start

Once you obtain your account, log in to your account to edit your profile and adjust a few settings. You can access your account settings by signing in via https://phsa.zoom.us. This needs to be done just once.

To ensure the best possible implementation of ZOOM for Healthcare in your clinic, watch DTO's video tutorial Using ZOOM for Healthcare for Virtual Visits: Preparing Your Workstation.

How to Download the ZOOM Application

When using ZOOM for Healthcare, you can download the desktop or mobile ZOOM Cloud Meetings application:

On desktop computer	On Android mobile device (phone or tablet)	On Mac mobile device (phone or tablet)
1. Open your internet browser 2. Type https://zoom.us/download 3. Download *Zoom Client for Meetings*	1. Open the *Google Play* Store 2. Search for 'ZOOM' 3. Select *ZOOM Cloud Meetings by zoom.us*. 4. Tap **Install**	1. Open the *App Store* 2. Search for 'ZOOM' 3. Select *ZOOM Cloud Meetings* 4. Tap **Get** to install.

Booking Virtual Visits

- Book virtual visits using the current booking method: online booking system, EMR or even paper schedule:
    - for the whole day
    - part of the day
    - spaced within a day to provide time needed to clean the examination room if necessary.

- Clearly indicate the virtual visits in your appointment scheduling tool and include the Zoom for Healthcare meeting link & patient contact details. For example: patient's phone number in case video is not working.

- Your patient will require some level of support. DTO has prepared templates that can be shared with your patient prior the visit. See the Overview section of this guide for links to patient handout examples.

- Decide also how your clinic will be obtaining and documenting patient consent to communicate electronically. See DTO Virtual Care Toolkit for more information on patient consent.

- Each physician will use their personal meeting room, which will be associated with a permanent link:
    - It eliminates the need to generate a new link for each visit
    - It allows to use the same invitation for all the patients
    - It eliminates the possibility of sending the wrong link to the wrong patient.

▪ The link can be found under the Personal Meeting ID settings and copied to the invitation:

| Personal Meeting ID | ***-***-*610 | Show |
| | https://doctorsofbc.zoom.us/j/*******610 | Show |

▪ The link is encrypted but still must be kept confidential and patients must be instructed not to share it. However, the risk is very low as this link will only provide access to the waiting area only. Physicians will need to verify patient names before admitting them and unwanted participant can easily be removed.

Template Example: Patient Invitation for a ZOOM Visit

The following template can be customized by your clinic and emailed as an appointment confirmation.

Thank you for booking your online appointment with Dr. [Name].

To start your Zoom for Healthcare visit on [date & time of visit], click on the meeting link below:

- [Copy & Paste Dr's Personal Meeting ID & link]
- Phone details optional (Please write down the meeting password for quick reference).

Preparing for Your Zoom for Healthcare Visit

To prepare for your first online visit, please review this short video which will introduce yourself to the virtual care experience. For tips and privacy & security considerations, see Frequently Asked Questions. It is also a good practice to check your audio & video prior the first visit.

Connecting to Zoom on Your Computer or Smartphone

If you already signed up for a Zoom account and downloaded the Zoom application on your computer or mobile device, simply click the meeting link above and enter your Meeting ID to start your appointment automatically. You will be placed in the virtual waiting room until Dr. [Name] is ready to see you.

No Zoom Account? No Problem

Simply copy and paste the meeting link listed above into any web browser. Select 'Join from your browser' at the bottom of the screen and enter your name to access the virtual waiting room. *(NOTE: Please enter a name that your doctor will recognize. Use the Chrome web browser for optimal performance.)*
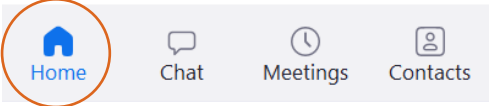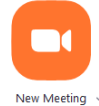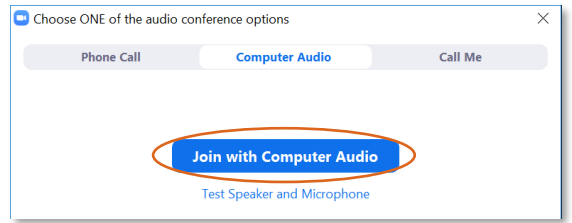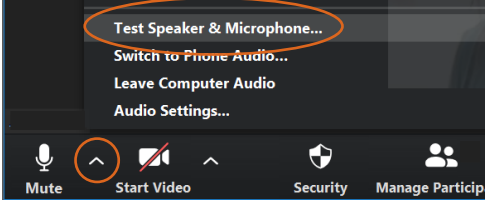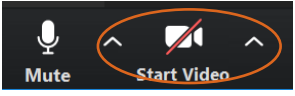
Preparing for your Virtual Care Visit

- Choose a well-lit, distraction-free, private location
- Ensure that your Zoom profile name or the name you entered via web browser is recognizable to your doctor.
- Have a pen and paper ready to take notes.
- Write down the name and address of the pharmacy where you typically pick up prescriptions
- Have the clinic's phone number available to assist with troubleshooting
- For inquiries related to your appointment booking, please contact the clinic at [phone] or [email].

[Clinic's signature]

Starting a Virtual Visit (Physician)

To view a video demonstration of the recommended ZOOM for Healthcare workflow, see DTO's video tutorial Using ZOOM for Healthcare: Conducting Virtual Visits.
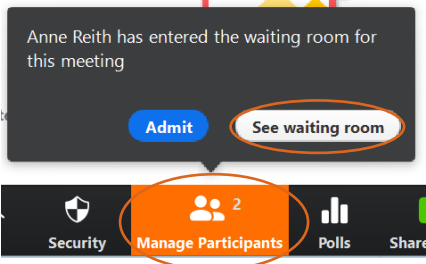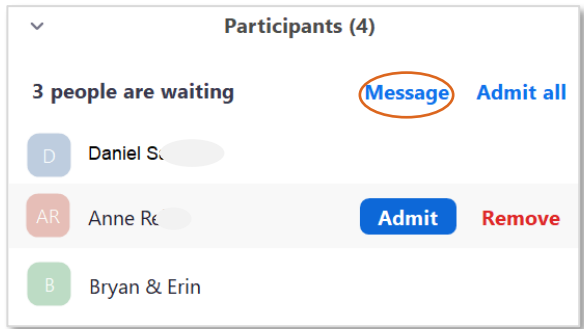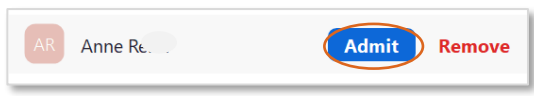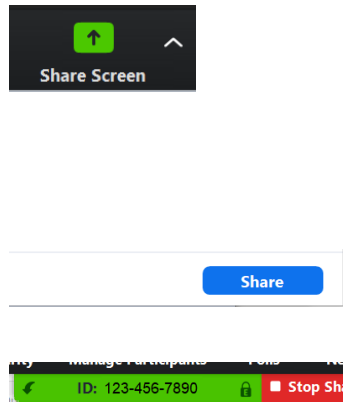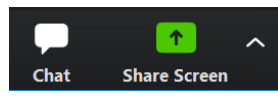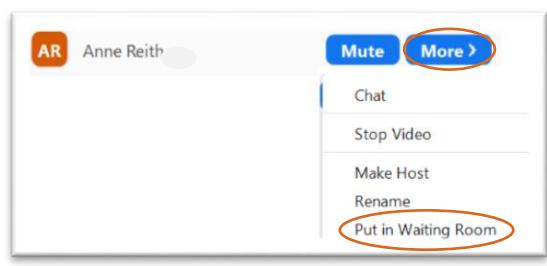
Opening Your Virtual Examination Room 1. To start your virtual appointment(s), click **Home** from the main menu. Start your meeting early. When your patients log in, they will be waiting until you are ready to admit them. You will see their names listed in the participant panel.	Home · Chat · Meetings · Contacts
2. Click **New Meeting** to start the session.	New Meeting
3. A pop-up message will display asking you to **Join with Computer Audio**. Select this option to continue.	Choose ONE of the audio conference options — Phone Call · Computer Audio · Call Me — Join with Computer Audio — Test Speaker and Microphone
Test And Enable Your Audio & Video Before admitting your patient into the virtual exam room, test your audio to confirm that it is working. 4. Clicking the arrow next to the microphone on the bottom left of your screen and selecting **Test Speaker & Microphone**.	Test Speaker & Microphone... Switch to Phone Audio... Leave Computer Audio Audio Settings... Mute · Start Video · Security · Manage Particip
5. To enable your video, on the bottom left of your screen click **Start Video**.	Mute · Start Video

Conducting a Virtual Visit (Physician)

|	
Admit Patients from the Waiting Room When you are ready to see your patients, view patients in the virtual waiting room. 1. Click **See waiting room** or click **Manage Participants** to display the names of patients that are waiting for a visit with you.	Anne Reith has entered the waiting room for this meeting Admit · See waiting room Security · Manage Participants · Polls · Share

2. You can communicate with all the patients who are currently in the virtual waiting room by clicking **Message**. **NOTE**: At this time, your messages will be sent to everyone in the waiting room. You cannot send messages to an individual patient at this time, unless they are in your contact list. Patients will not be able to send you a message back in response.	**Participants (4)** 3 people are waiting — (Message) Admit all D Daniel S AR Anne R⌐ **Admit** **Remove** B Bryan & Erin
3. To begin a virtual visit, click on the **Admit** button next to the patient's name to move them from the waiting room into your virtual exam room (PMI).	AR Anne R⌐ **Admit** **Remove**
Sharing your Screen **4.** To share your screen with a patient during the visit, click the **Share Screen** option at the bottom of your screen. You will be presented with options on what to share (example: Desktop 1, Word Doc, Website – whatever is currently open on your device) **5.** Select the screen you want to share, then click **Share** at the bottom right corner. **6.** To stop sharing your screen, move your mouse cursor to the top of your ZOOM screen and click **Stop Share**.	Share Screen **Share** Manage Participants Polls New S ID: 123-456-7890 ◼ Stop Share
Sending Messages to Patients in the Waiting Room You can use the chat feature to communicate with all patients participating in your visit e.g. family members. **7.** Click the **Chat** button at the bottom of your screen. This will open up the Chat panel to the right.	Chat Share Screen
Putting Patients Back in the Waiting Room **8.** If for any reason you need to put your patient back into the waiting room, hover your mouse cursor over the patient's name and click on the **More** button. From the drop-down menu, select **Put in waiting room**.	AR Anne Reith **Mute** (More >) Chat Stop Video Make Host Rename (Put in Waiting Room)

Ending a Virtual Visit (Physician)

Removing a Patient

1. To end the visit with the patient, hover your mouse cursor over the patient's name and click the **More** button.

2. From the drop-down menu select **Remove**. This can be used to ensure your virtual exam room is cleared before admitting your next patient. Patients may also sign off voluntarily.

Note: Do not select the **End Meeting** button on the bottom of your screen as this will end the session for everyone, including patients in your virtual waiting room. Instead, repeat the instructions for how to Admit Patients from Waiting Room.
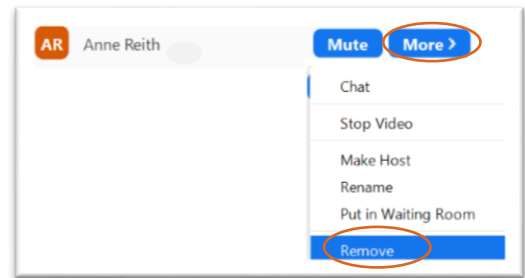
Definitions

ZOOM for Healthcare provides providers with multiple ways to communicate with patients such as:

- one-to-one meetings
- group meetings, or
- webinars.

Communication can happen ad-hoc or be pre-scheduled and participants can be in various roles with different forms of engagement. Below, you will find a more detailed explanation of **how ZOOM features relate to clinical workflows**:

ZOOM meetings can be used for virtual care visits.
    A videoconferencing session connecting a physician with patient and, when appropriate, a care giver, family members, an interpreter or another health provider.

ZOOM webinars is more suitable for education sessions or group counselling.
    This session type allows for view-only attendance where only a presenter can share video and audio with a group of patients that are at different locations. Participants can chat or ask questions but cannot present anything. Group session can have more than one presenter (for example: a dietitian). More information about group sessions is provided on DTO YouTube Channel.

ZOOM meeting host is a physician or healthcare provider
    In ZOOM, the physician host has the ability to start the ZOOM meeting (video session), view the list of patients in the waiting room and to admit patient when they are ready for their next appointment.

ZOOM meeting participant(s) are patients or other healthcare providers
    Meeting participants are typically patients who participate in the virtual care visit (meeting) or in group counselling (webinar). Other participants may include specialists or allied health during consultations.

Personal Meeting Room (PMI) is your virtual exam room.
    Your PMI is a private and secure virtual space reserved for a physician to see patients, much like an online exam room. It is ideal to have several virtual visits booked in a row, so you can admit patients from the waiting room.

ZOOM Waiting Room is your patient queue

> Patients will be sent to a waiting room until they are admitted when the physician is ready to see them. See the Starting a Virtual Visit section in this guide.

Personal Meeting ID (PMI) is the patient's key to the virtual examination room:

> The (PMI) a unique identifier for the physician's personal meeting room in form of a link. This link is typically provided to the patient via email and is used to access the virtual visit. It stays the same all the time so an MOA does not have to change the invitation link for each patient. This link **only** allows patients to access the virtual waiting room. The physician controls who is admitted to the virtual visit.

ZOOM Meeting Invite should be included in the Appointment Invite or Confirmation email

> The appointment confirmation email must always contain Personal Meeting ID (PMI) link. It should be sent in advance to start the virtual visit (ZOOM meeting). This link is generated by the software and encrypted. See the Booking Virtual Appointments in this guide or Template Example: Patient Invitation for a ZOOM Visit

Additional Resources & Supports

Zoom for Healthcare Resources & Templates

- **ZOOM for Healthcare Support Desk -** Physicians, clinical staff and patients are invited to contact the PHSA Citizen Support Desk for technical support from Monday – Friday, 7:00am – 5:00pm. To obtain the support desk contact, please contact dtoinfo@doctorsofbc.ca.

- **DTO Virtual Care Learning Series** – DTO has published short Zoom for Healthcare Video Tutorials to demonstrate how clinics can use Zoom in their clinical workflow. See the DTO YouTube Channel.

- **Virtual Care FAQ for Physicians and MOAs** – This FAQ is regularly updated with the most current information, including details about the Zoom license registration process, privacy & security and more.

- **Zoom for Healthcare Patient handouts**: These templates can be shared directly with patients by clinics via email. See Template Example: Patient Invitation for a ZOOM Visit which can be customized as needed.

  - Zoom for Healthcare: Quick Start Guide for Patients
  - Zoom for Healthcare Frequently Asked Questions

Additional Virtual Care Resources

- **DTO Virtual Care Toolkit:** A detailed overview of the foundational processes, virtual care tools, privacy & security considerations and templates that a clinic should have to implement virtual care.

- **Guide to E-faxing When Working Remotely:** An overview of workflows and tools for physicians and MOAs who need to fax documents from outside the clinic.

- **Virtual Care for Patients – FAQ & Troubleshooting Tips:** Information to help patients prepare for virtual care visits. Designed for clinics to share with their patients as a resource guide.

- **Practice Support Program (PSP)** assists physicians and Medical Office Assistants (MOAs) to enhance their practices through a range of activities and initiatives that include adoption of new tools such as ZOOM for Healthcare. Contact your regional PSP team for more information.

Updates to this document will be made on an as-needed basis, please check here for the latest version.

Doctors Technology Office (DTO) is here to support you, please reach out with your virtual care questions to:
📞 604 638-5841   ✉ DTOinfo@doctorsofbc.ca   🌐 www.doctorsofbc.ca/doctors-technology-office