

# DOCTORS TECHNOLOGY OFFICE

## Guide to Using ZOOM for Healthcare for Group Medical Visits and Team Meetings

### Overview

ZOOM for Healthcare<sup>1</sup> can be used for one-on-one virtual video appointments with patients and also in other scenarios such as:

- **Educational sessions for patient groups**  
e.g. group consulting for patients with high blood pressure on life style changes.
- **Group visits with family members or care team members**  
e.g. discussing home care options for elderly patients.
- Clinic **team meetings** with staff participating remotely  
e.g. daily check-ins, weekly/monthly meetings.

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

Contact [DTOinfo@doctorsofbc.ca](mailto:DTOinfo@doctorsofbc.ca) to explore other options for providing virtual care.

While some group sessions offer convenience or more patient-centric care, educational group sessions are also a viable service with already existing service fee codes. Contact Doctors of BC Economics Department at [economics@doctorsofbc.ca](mailto:economics@doctorsofbc.ca) for details:

13041	Group counselling - first hour	\$86.94
13042	Additional ½ hour	\$43.50

This guide provides information on how to organize and conduct group sessions ZOOM for Healthcare. It also provides [facilitation tips](#) and advice around effectively facilitating larger sessions.

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<sup>1</sup> Free accounts for ZOOM for Healthcare are currently offered for 1-year by Doctors Technology Office (DTO) in partnership with Provincial Health Services Authority’s (PHSA) Office of Virtual Health. This version of ZOOM is recommended for clinical use. To apply, complete the application form at <https://bcvh-zoom.phsa.ca>.

# Poster: Using ZOOM For Healthcare for Group Sessions

## Educational Sessions

to provide information to a group of patients

- Select a topic and suitable group of patients (10-15 max recommended)
- Schedule a **ZOOM webinar**. See [step-by-step instructions](#) and check our [DTO YouTube Channel](#) for the video tutorial.
- Send the registration link to the selected patient group via your typical communication methods. See [template examples](#) in this guide.
- Conduct the webinar. See [Facilitation Tips](#).
- Enter notes in each chart and bill for group counselling.

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## Group Visits

to include family members or care providers

- Schedule a group visit using your current booking system.
- Email the virtual visit invitation with the **ZOOM meeting** link to all participants. Use your current process. Inform all visit participants that this will be a group appointment.
- Follow your virtual visit workflow: Start your video visits by clicking **Home** from the main menu and selecting **New Meeting**.
- Verify participant names in the waiting room.
- Admit all participants to a meeting to start the group video visit.
- Conduct the virtual visit as you typically do.
- To end the visit, **Remove each person individually** from your meeting. Do not click **End meeting** for all if you have other patients waiting for their virtual visits.

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## Clinic Team Meetings

for daily check ins or periodic meetings

- Inform your team about the date and time of the meeting.
- Decide who is the meeting organizer and provide all meeting attendees with the **ZOOM meeting** that belongs to this person (Personal Meeting ID).
- As the meeting organizer, follow your virtual visit workflow and start a video session by clicking **Home** from the main menu and selecting **New Meeting**.
- Admit team members listed in the waiting room before starting the video session and conduct your meeting.

### ZOOM Webinar:

- Enables clinic to schedule the session ahead of time
- Generates a registration link
- Sends automated reminders
- Participants can be anonymous to other people in the group if they choose so
- Participants can engage by using *Chat, Q&A, or raised hand* features
- Useful links from the internet can be shared via *Chat*
- Webinar host or co-host can *share their screen*
- *Webinar host or co-host can mute participants*
- A webinar co-host (MOA) can help with meeting facilitation

### ZOOM Meeting

- Can follow the same process as video visits
- Can be scheduled in calendars but does not generate automatic email reminders
- Everyone participates at the same level
- *Chat* is enabled; no *Q&A box*
- Allows for collaboration using screen sharing or whiteboard
- Secure access is ensured by the waiting room feature

# Facilitation Tips for Group Sessions with ZOOM Webinar

## Email Settings

- Use an email service designed for large volumes when contacting a group of patients.  
[Reach out to DTO](#) for more information on email tools.
- Use your general clinic email address or create an email address specifically for webinars only.
- Turn on automated emails - upon registration, this will ensure emails are automatically sent to provide patients with log-in details.
- Decide if you want to send automatic or personalized follow-up email to all attendees and absentees. Turn this option off if you prefer sending your own emails.

## Patient Registration

- Make the registration for the session required.
- If you want to control who will be attending your session, choose manual approval.
- If you want to be notified when a patient registers, turn the notifications on.
- Select one or more options for sending email reminders: one week, one day or one hour prior to the session.
- Always 'close registration after the event date'.
- Under the Branding tab, you can upload your clinic logo or change your clinic name.
- Under the Description field, you can place the group session disclaimer.

## Session Preparation

- Test with your team/family/friends prior to the first session to gain confidence with the tool
- Make a backup plan:
  - Ensure alternative device(s) are charged, logged in, and ready to go with ZOOM.
- Test your virtual set up to ensure there is proper light and good sound quality, adjust your camera angle and choose a private space.
- Use the *Enable Practice Session* to test all your audio and video right before the start:
  - Practice switching sharing screens between host and presenter.
  - Test poll question functionality if applicable.
- If applicable, promote your MOA to Co-Host which will enable them to display slides, manage Q&A and Chat, or share screens.

## Patient Engagement

- Let patients know they can disable their audio/video during the session.
- Explain the Q&A, Chat, and Raise Hand functions.
- Ask to enter all questions into Q&A so they can be recorded and available after the session for the follow-up.
- You can set up poll questions for the session. Enter each question as a separate poll if you want them displayed at different times during the session.
- Allow all attendees to see all questions asked.
- Allow for anonymous questions when setting up the Q&A.
- Monitor questions and comments – dismiss any resolved questions to avoid noise or disruption.

## Template Example: Email Invitation for Education Group Session

The following template can be customized by your clinic and emailed as the group session promotion.

Dear [Patient Name]

We are pleased to invite you to our upcoming session presented by [Insert presenter's name] on [Webinar Topic].

The purpose of this session is to [Insert short description why the patient should attend]

**Topic:** [Education Group Session Title]

**Time:** 00:00 – 00:00, Weekday, Month Day, Year

**Presenters:** [Doctor/Presenter Name and Clinic/Organization]

### How to register?

To register, click the following link [paste the link here]

- This is a group session and you will be attending with other patients present online.
- Your privacy will be fully protected and no private or confidential information will be disclosed.
- The name you use to register will be visible to others in the group visit. If you prefer to remain anonymous, register using your initials only, or first name and last initial.
- At any time, you can leave the session if you do not feel comfortable.

### Need more information or to cancel the registration?

Please respond to this email or contact the clinic at [phone number] with at least 24 business hours advance notice.

## Template Example: Privacy Disclaimer for Education Group Session

Patients must be made fully aware that they will be participating in a group session and advised about the potential risk and privacy protection measures to be taken. Document informed consent in patient charts.

- Obtain the informed consent at time of registration. Enter a link to an informed consent form or add a disclaimer under the Description when scheduling the session.
- You can also include disclaimer text in the email invitation you send out to promote the session.

By joining us online at the above link for this session, you are providing consent to participating in a group online visit, knowing that by the nature of a group visit, this is not an entirely anonymous session; however, you can choose to rename yourself, disable your video and audio, etc. to increase your privacy if you prefer. I will not disclose your specific confidential healthcare information in front of the group to preserve your privacy. You can withdraw your consent by leaving the group session at any time. No recordings are permitted. Please do not post this meeting link publicly online or on social media to protect our privacy. Thank you!

# Support Available

## Direct Support

- [DTO Team Support](#) – Health Technology Advisors and ZOOM for Healthcare trainers are available to answer your questions and provided 1-on-1 support with using ZOOM for Healthcare in clinical practice or to provide general health technology, privacy & security or troubleshooting support.
- [DTO Virtual Care Peer Mentor Support](#) – Connect with fellow physicians and MOA superusers who can provide real-life and EMR-specific clinical tips on implementing virtual care tools, communication strategies, or delivering a hybrid (virtual and in-clinic visits) healthcare model during the pandemic.
- [Practice Support Program \(PSP\) Regional Support Teams \(RST\)](#) provides an accredited practice facilitation approach and funding opportunities for physicians and their teams around virtual care workflow optimization, EMR optimization and panel management. Contact your [regional PSP team](#).

## Virtual Care Tool-Specific Tutorials

- [Virtual Group Medical Visits](#) – recording of the Physician Drop In Session with Dr. Deni Hawley, who shared her experiences, best practices and lessons learned around conducting Group Medical Visits.
- [Conducting Patient Education Session using ZOOM Webinars](#) – a video tutorial demonstrating how to set up a webinar with ZOOM for Healthcare
- [DTO YouTube Channel](#) – a library of DTO video tutorials with tools currently popular with community physicians such as Doxy.me
  - Using ZOOM for Healthcare for Virtual Visits - [Video Tutorials](#) | [Quick Start for Physicians/MOAs](#) | [Quick Start Guide for Patients](#) | [Patient FAQ](#)
  - Using Doxy.Me for Virtual Care – [Video Tutorials](#) | [Webinar Recording](#) | [PPT Slides](#)

## DTO Virtual Care Resources

- [DTO Virtual Care Resources](#) - DTO regularly publishes new resources on our website such as:

### FOR PHYSICIANS & MOAS

- [DTO Virtual Care Toolkit](#)
- [Guide to E-faxing When Working Remotely](#)
- [Virtual Care FAQ for Physicians & MOAs](#)
- [ZOOM Quick Start for Physicians/MOAs](#)

### FOR PATIENTS

- [\[Shareable Poster\] Clinic Providing Virtual Care Visits During COVID-19 \(8 Translated Languages\)](#)
- [\[Shareable PDF for Patients\] Virtual Care FAQ](#)

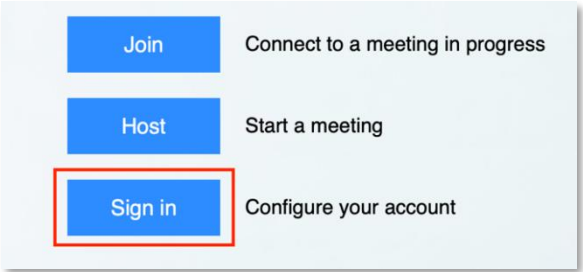
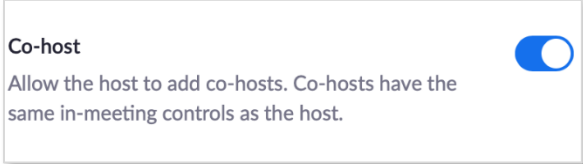

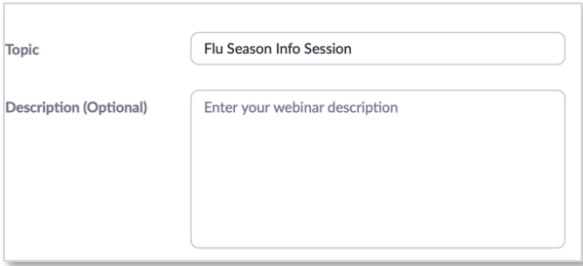
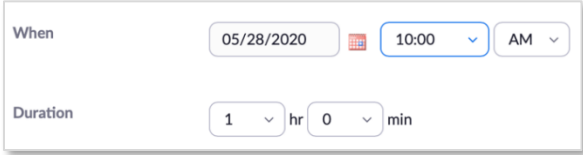
### WEBINARS & ACCOMPANYING RESOURCES


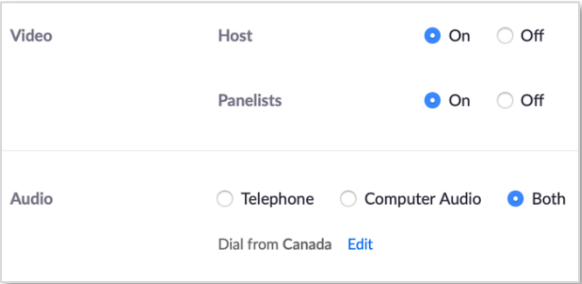
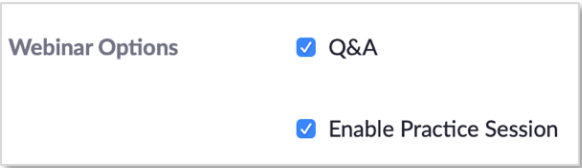
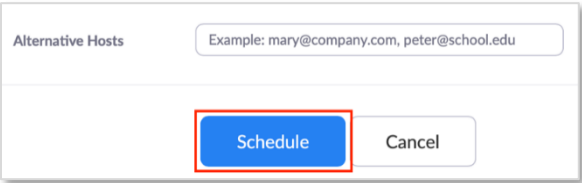
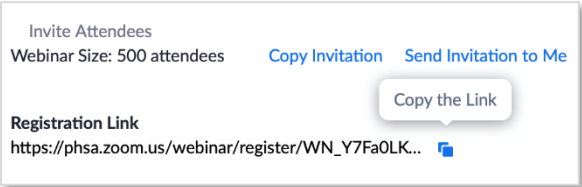

- [DTO Virtual Care Quick Start for Physicians Webinar](#) - A physician-led overview of the [DTO Virtual Care Quick Start Guide](#) followed by a Q&A session. [Video Recording](#) | [PPT Slides \(PDF\)](#)
- [Virtual Care Quick Start for MOAs Webinar](#) – MOA peer-led overview on how to support MOA workflows and virtual visits. [Video recording](#) | [PPT Slides \(PDF\)](#)
- [Getting Patients Back to Practice – Navigating the New Norm](#) – A physician-led overview on how to build practices back up to full capacity, promote virtual care availability and connect with & prioritize at-risk patients. [Video Recording](#) | [PPT slide deck \(PDF\)](#) | [Guide PDF](#)

# Appendix: Step-by-Step Instructions

## Setting up ZOOM Webinar for a Group Visit

To view a video demonstration of the steps below, see DTO's video tutorial [Conducting Patient Education Sessions Using ZOOM Webinars](#).

<p><b>Adjusting Settings (one time only)</b></p> <p>Webinars must be created by logging into your ZOOM account via a web browser:</p> <ol style="list-style-type: none"> <li>1. Navigate to <a href="https://phsa.zoom.us">phsa.zoom.us</a> and click the <b>Sign In</b> button to login. Enter the email address you signed up for your PHSA ZOOM account with.</li> </ol>	
<p>To allow MOA to help during the group session, change the settings:</p> <ol style="list-style-type: none"> <li>2. Click <b>Settings</b>, and under the section <b>In Meeting (Basic)</b>, find the setting titled <b>Co-host</b> and toggle it on.</li> </ol> <p>This setting will allow you to promote an MOA from panelist to co-host *during* the webinar, so they can assist in moderating questions, removing others from the webinar if necessary, or screen sharing on your behalf.</p>	
<p><b>Scheduling a Webinar</b></p> <ol style="list-style-type: none"> <li>1. Click the <b>Webinars</b> option in the left-hand panel. Then, click the <b>Schedule a Webinar</b> button to get started.</li> </ol>	
<ol style="list-style-type: none"> <li>2. In the <b>Topic</b> field, enter the name for your webinar that will be visible to your patients.</li> <li>3. The <b>Description</b> field is optional but can be used to add more information about the group visit. Information included in this area will be included in any automated emails sent via ZOOM to participants.</li> </ol>	
<ol style="list-style-type: none"> <li>4. In the <b>When</b> field, enter the date and time for the webinar.</li> <li>5. In the <b>Duration</b> field, enter the anticipated duration of the group visit. This is for information only and will not cause the webinar to end abruptly.</li> </ol>	

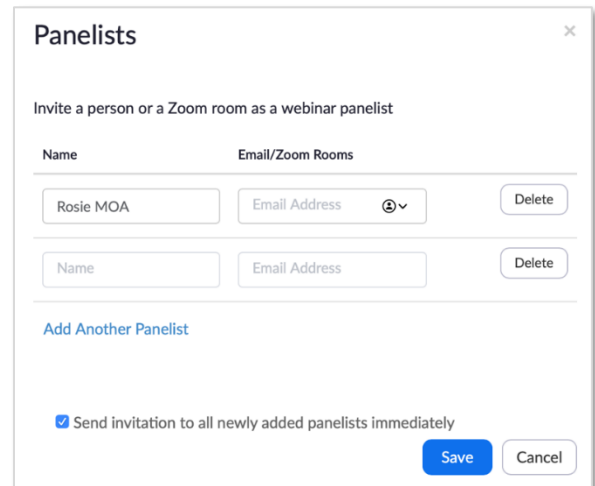
<p>6. In the <b>Registration</b> area, check the box titled <b>Required</b>. Anyone joining the webinar needs to register beforehand. Registration can be approved automatically or manually.</p>	 <p>The screenshot shows the 'Registration' section with a checkbox labeled 'Required' which is checked with a blue checkmark.</p>
<p>7. Choose whether to enable <b>Video</b> for Hosts and/or Panelists.</p> <p>8. In the <b>Audio</b> field, leave the setting as <b>Both</b> to allow patients to connect with Computer Audio (recommended) or via Telephone. This is useful for patients who have low-speed internet connection or prefer phone audio.</p> <p>9. Allow participants to register from multiple devices so they can call in if their computer audio is not working.</p>	 <p>The screenshot shows settings for 'Video' and 'Audio'. Under 'Video', 'Host' and 'Panelists' are both set to 'On'. Under 'Audio', 'Both' is selected. There are also options for 'Telephone' and 'Computer Audio', and a link for 'Dial from Canada'.</p>
<p>10. Under the <b>Webinar Options</b> field, select the <b>Q&amp;A</b> checkbox if you plan for using this during the webinar.</p> <p>11. The <b>Enable Practice Session</b> setting allows you to test your audio and video while participants are waiting for the session.</p> <p>Once tested, you will be able to click the <b>Broadcast</b> button to start the session and admit waiting participants.</p>	 <p>The screenshot shows the 'Webinar Options' section with checkboxes for 'Q&amp;A' and 'Enable Practice Session', both of which are checked.</p>
<p>12. Press the <b>Schedule</b> button to save your entries and complete scheduling.</p> <p>NOTE: Participants can be promoted to panelist or co-host during the webinar.</p> <p>If the original host is unable to attend or start the webinar, you can designate another individual who has a PHSA-provisioned ZOOM account as an <b>Alternative Host</b>.</p>	 <p>The screenshot shows an 'Alternative Hosts' text input field with the example text 'Example: mary@company.com, peter@school.edu'. Below it is a blue 'Schedule' button with a red border and a grey 'Cancel' button.</p>
<p><b>Inviting patients to the group session</b></p> <p>To invite patients, you will need to send them the link to register for the webinar. Ideally this will be done using email.</p> <ol style="list-style-type: none"> <li>To locate the registration link, select <b>Webinars</b>.</li> <li>Scroll to the bottom of the page to display section titled <b>Invitations</b> and press the button to next to the <b>Registration Link</b> to copy the link.</li> <li>For <i>self-registration</i>, email the link to the patients.</li> </ol>	 <p>The screenshot shows the 'Invite Attendees' section with 'Webinar Size: 500 attendees' and buttons for 'Copy Invitation' and 'Send Invitation to Me'. Below is the 'Registration Link' with a 'Copy the Link' button and the URL 'https://phsa.zoom.us/webinar/register/WN_Y7FaOLK...'.</p>
<p>4. To <b>Manage Attendees</b>, press the <b>View</b> link. You may also cancel their registration or resend their registration link through this section.</p>	 <p>The screenshot shows the 'Manage Attendees' section with 'Registrants: 0' and 'Automatically Approved'. There is a blue 'Import from CSV' button and a red-bordered 'View' button.</p>



### Assigning an MOA to assist with the group session

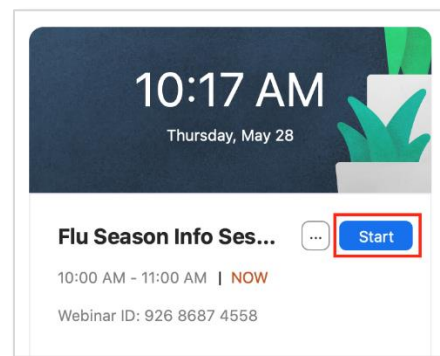
An MOA should be invited as a Panelist to assist you during the session to display the presentation, share screen, or manage Q&A and Chat.

1. Locate a section titled **Invite Panelists** under the **Invitations** area, and press the **Edit** link.
2. Enter the MOA's name and email address.
3. Ensure the **Send invitation to all newly added panelists immediately** is checked
4. Press **Save**. Your MOA will then receive an email invite to join the webinar.

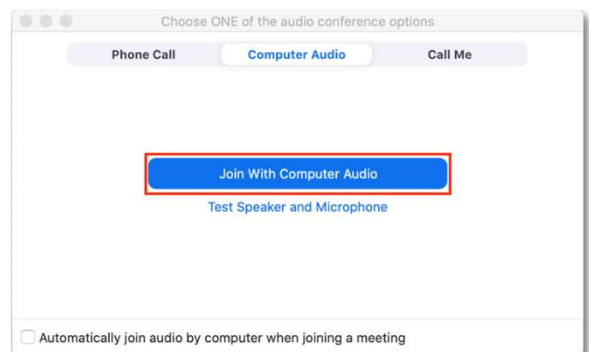


### Starting a group session over webinar

1. Open the ZOOM application on your computer and select the **Home** tab.
2. Your scheduled webinar is visible on the right-hand side. To start your webinar, press the **Start** button.

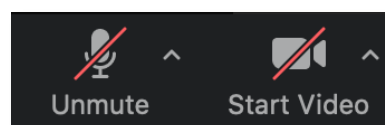


3. Select **Join With Computer Audio** when prompted.



If you set up your webinar with the **Enable Practice Session** setting turned on, an orange bar across the top of your screen will notify you that you are currently in Practice mode.

4. Click **Broadcast** when you are ready.
5. To enable your camera, press the **Start Video** button.
6. To mute or unmute yourself, press the **Mute/Unmute**.  
If needed, adjust your audio or video by pressing the upward arrows next to each icon to display more options.

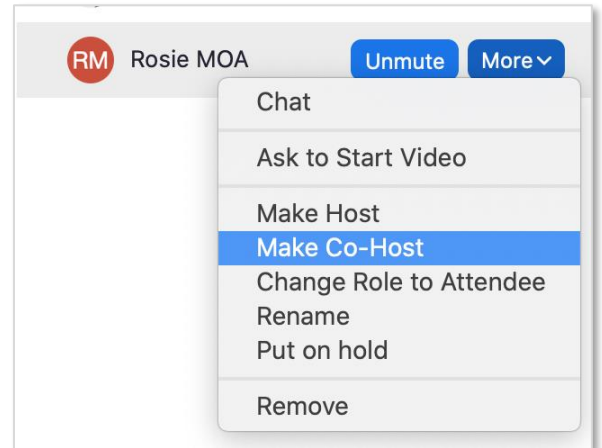




### Providing your MOA with administrative control

Now, you can promote an MOA to a Co-host to assist you in moderating the webinar:

1. Hover over the name and press the **More** button.
2. Select **Promote to Co-Host**. A Co-Host label will be displayed next to the MOA's name.

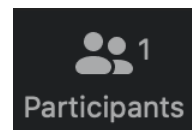


### Managing Participants

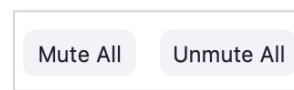
1. Make the Participants panel visible by pressing the **Participants** button.

This view is separated into Panelists, which includes the Hosts.

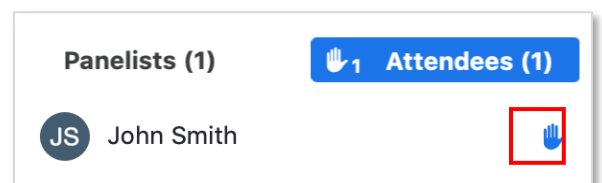
Patients that have registered for the group visit will be listed under the Attendees area.



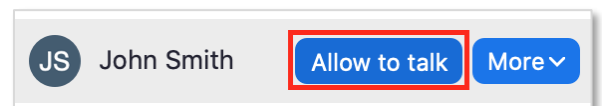
2. Click **Mute All** to limit distractions during the webinar. Click individual names to un-mute their audio so they can present, ask questions and provide comments.



Observe if any participating patient has a raised hand. This typically indicates that they would like to ask question or make a comment.

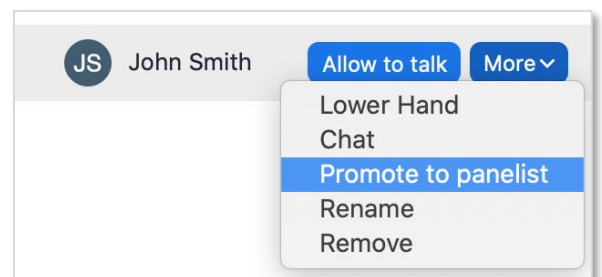


3. To allow patient to talk to the entire group, hover your cursor over the name and click **Allow to Talk**.




4. To allow a patient to turn on their video, right-click on their name and select **Promote to Panelist**.

NOTE: Panelists are able to share their video, mute and unmute themselves, see questions and type answers in the Q&A box and view the attendee list. They are not, however, permitted to share their computer screen. They must be promoted to a co-host in order to do this (see below).




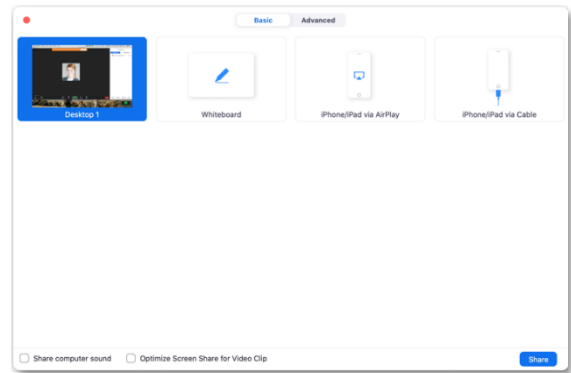
### Sharing your screen with patients

Hosts and Co-hosts are able to share their screens:

1. Press the **Share Screen** button .
2. Select the screen you would like to share.

In order for another Host to share their screen:

3. The Host that is currently sharing has to press the **Stop Sharing** button  at the top of their screen.
4. The next Host has to click **Share Screen** and select the screen or window they would like to share.

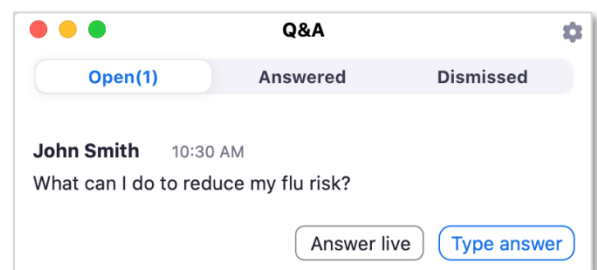


### Managing Q&A from patients

The Q&A feature allows participants to type their questions for all to see. Other participants can **Up-vote** the question to indicate that they are also interested in hearing an answer.

1. Press the **Q&A** button to open the panel. Questions will appear in the order received or based on votes.
2. Type answers to questions directly in the panel or mark a question to be answered live over the webinar.

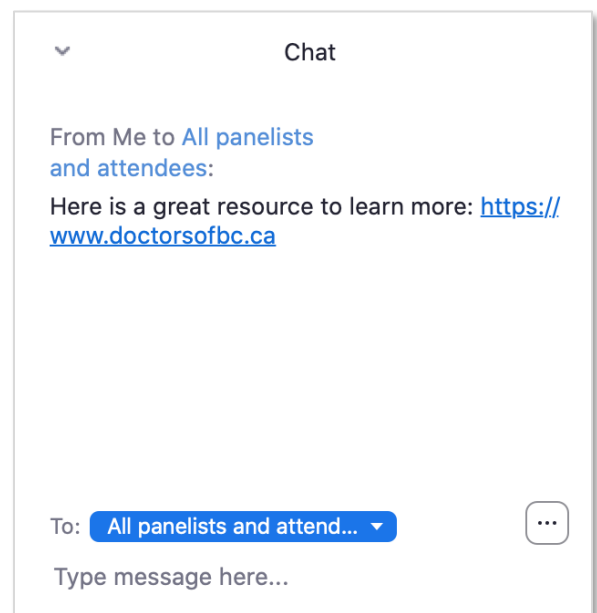
Q&A entries are also saved so the answers can be provided as the follow up after the session.



### Managing Chat


1. Press the **Chat** button open a panel where you can view and type text.
2. In the TO: field, you can designate a specific participant or audience (i.e. all panelists and attendees) for your chat message.

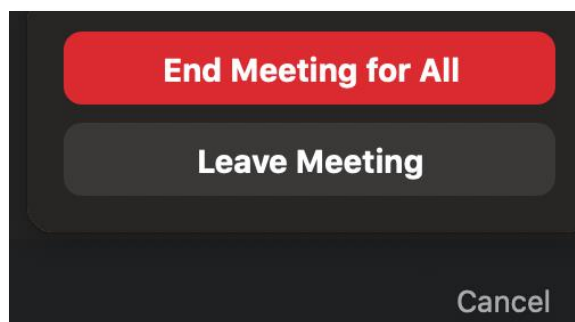
This is also an area that can be useful for sharing clickable links to patient resources.



### Ending the group session

- To end the webinar, select **End Meeting for All**, which will close the webinar for all participants (recommended).

NOTE: The red **End** button  closes your individual session only so other participants can continue the session.



## Additional Resources & Supports

### Zoom for Healthcare Resources & Templates

- [ZOOM for Healthcare Support – Physicians & clinical staff](#) are invited to contact [DTOinfo@doctorsofbc.ca](mailto:DTOinfo@doctorsofbc.ca) for workflow support, and [OVHZoomSupport@phsa.ca](mailto:OVHZoomSupport@phsa.ca) for technical support.
- [ZOOM for Healthcare Support – Patients](#) are invited to call the Citizen Support Desk 1-844-442-4433 for technical support from Monday – Friday, 7:00am – 5:00pm.
- [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:  
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