# Table of Contents

FAQ .............................................................................................................................................2

CLINICAL GUIDELINES ..............................................................................................................4

AS A PROVIDER ............................................................................................................................6

Starting an Instant Meeting ........................................................................................................7

Scheduling an Appointment with Reminders ............................................................................9

Scheduling an Appointment on Behalf of a Provider .........................................................11

Join a Meeting from a Computer ..........................................................................................13

Join a Meeting from a Smartphone or Tablet ....................................................................15

Setting Meeting Templates ..................................................................................................17

AS A PATIENT/CLIENT ...............................................................................................................18

Confirming Your Appointment .............................................................................................19

Join a Meeting from a Computer ........................................................................................20

Join a Meeting from a Smartphone or Tablet ....................................................................22

APPENDIX ..................................................................................................................................23

Appendix A – Guidelines ......................................................................................................24

Appendix B - Patient Notice of Video Appointment .........................................................24

Appendix C - Resources ........................................................................................................28
FAQ

Q: Who requires an account?
- Administrative staff supporting clinicians, physicians, or operations
- Clinicians and physicians
- Clinics can share one account if not running meetings concurrently

Q: What platforms support Zoom?
- Apple and Android devices, as well as Windows Desktop

Q: What can I do on the platforms?

<table>
<thead>
<tr>
<th>Platform</th>
<th>Book meetings</th>
<th>Run meetings</th>
<th>Instant meetings</th>
<th>Change account settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Portal</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobile App</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Desktop</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Q: What about privacy and cost?
- Canadian privacy compliant
- Free download for Vancouver Coastal Health staff
Q: What are the meeting types?

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Webinars</strong></td>
<td>• Appointment Confirmation&lt;br&gt;• Appointment Reminders&lt;br&gt;• Group Education Broadcast</td>
</tr>
<tr>
<td><strong>Meetings</strong></td>
<td>• Group Meetings- Interactive&lt;br&gt;• Short turnaround appointments</td>
</tr>
<tr>
<td><strong>Instant Meetings</strong></td>
<td>• Quick connect&lt;br&gt;• Ability to personalize the meeting ID</td>
</tr>
</tbody>
</table>

Q: What do my patients require to have a Zoom meeting?

- Access to internet (WiFi or Data)
- Smart Phone, Tablet, Computer
- Review Privacy Notice – Appendix A
Clinical Guidelines to having virtual appointments

The Essentials to Getting Started With Virtual Care:

- Review the guidelines for having a Zoom appointment in the Zoom manual

- Obtain patient email addresses and/or mobile numbers:

  Email addresses can be used for communicating new virtual care services to groups of patients, and can be used for sending the virtual visit link/URL to a patient. Mobile numbers are useful for communicating with a patient if there are any issues with the virtual visit, or to ensure they are ready for their visit.

- Obtain patient verbal consent:

  Verbal consent documented in the patient’s chart is fine as a minimum. Patients should also be instructed to review the Privacy Notice that has been posted on the VCH website.

Example of a short privacy/consent statement you may want to use with your patient/client:

“Just like online shopping or email, Virtual Care has some inherent privacy and security risks that your health information may be intercepted or unintentionally disclosed. We want to make sure you understand this before we proceed. In order to improve privacy and confidentiality, you should also take steps to participate in this virtual care encounter in a private setting and should not use an employer’s or someone else’s computer/device as they may be able to access your information. If you want more information, please check the link the VCH website [http://www.vch.ca/your-care/virtual-health](http://www.vch.ca/your-care/virtual-health). Are you okay to continue?”

Documentation of the patient consent:
Clinicians should be documenting the patient verbal consent in their documentation system (paper, Cerner, PARIS, etc.).
Example:

Informed verbal consent was obtained from this patient to communicate and provide care using virtual and other telecommunications tools. This patient has been explained the risks related to personal health information and steps they can take to help protect their information.

**Virtual Visit Etiquette Tips:**

- Introduce yourself
- Try to maintain eye contact with the camera (patient) during the visit
- Consider the space that the patient will view during a virtual visit.
- Consider clarifying your actions to the patient if you are not looking at them. E.g. typing up notes on the EMR.
AS A PROVIDER

(Demo)
Starting an Instant Meeting

1. Open the ZOOM app, sign in if required, and select the ‘Home’ tab. Click the ‘New Meeting’ icon.

2. Ensure the ‘Video On’ option is active, and click ‘Start a Meeting’.
   Select ‘Call using Internet Audio’.

3. Select the ‘Participants’ button on the toolbar, and click ‘Invite’
From the list, select ‘**Send Message**’. Enter the phone number of the person you would like to invite, and click ‘**Send**’.

The invitee will receive a text with a link. They can enter the link into an internet browser to join.

---

When the invitee joins, you will automatically see their image appear.

The toolbar shows your options (mute, turn the camera on, share content, add additional participants). To end the meeting select ‘**Leave Meeting**’.
Scheduling an Appointment with Reminders

1. Log into your account at: www.zoom.us

2. Click on the ‘Webinars’ tab. Schedule a new Webinar or book using an existing template.

3. A. To schedule a new Webinar, click ‘Schedule a Webinar’.

   Fill in the appropriate details.
B. To schedule using an existing TEMPLATE, click ‘Webinar Template’.

Fill in the appropriate details.

4. Copy the invitation: After you have filled out the details on the appointment, you are brought to a new page. Scroll down to find the invitations section and press ‘Copy the Invitation’

5. Email the zoom appointment information to the patient.
Assigning a Delegate to Book on Your Behalf ........................

You can assign or delegate a user or multiple users in your account to schedule meetings on your behalf.

1. Log into your account at: www.zoom.us

2. Click ‘My Account’. Then click ‘Settings’, and ‘Other’.

3. Click on the ‘Webinars’ tab. Schedule a new Webinar or book using an existing template.

4. Enter one or more email addresses in the window, separated with a comma. Then click ‘Assign’.

*Note: Anyone who is scheduling on your behalf will need to also have a Zoom license.

If the user was assigned successfully, they will appear under Assign Scheduling Privilege to. However, they will need to sign out of the Zoom desktop client and sign in again before they will be able to schedule for you there.
Scheduling an Appointment on Behalf of a Provider

1. Log into your account at: www.zoom.us

2. Click the ‘Webinars/or meetings’ tab.

3. Fill out details for a new Webinar/Meeting or book using an existing template: See Scheduling an Appointment.

   Before pressing ‘Save’, select the provider you would like to schedule for in the drop down menu.

   *Note: If you do not see them in the list, they will need to provide you access to book on their behalf (see: Providing Access for Someone to Book on Your Behalf)

4. Press ‘Save’, then follow the remaining steps for emailing the patient the Meeting/Webinar information.
Join a Meeting from a Computer

1. Open the Zoom website, sign in if required, and select ‘My Account’. Then select ‘Webinars’ or ‘Meetings’.

2. Find the appropriate meeting and select the ‘start’ button.

3. Select ‘Open in Zoom Meeting’.
Select which audio you would like to join with, and ensure that your camera and microphone are turned on.

Locate and select the patient, and then select ‘Promote to Panelist’. If you do not ‘Promote’ the patient, their camera will not turn on.

To admit the patient to the visit, select the ‘Participants’ button on the toolbar.


The toolbar shows your options. You can click ‘unmute’ to speak or ‘start video’ to turn your camera on. You can end the meeting by selecting ‘Leave Meeting’.
Join a Meeting from a Smartphone or Tablet ..................

1

Open the Zoom app, sign in if required, and select the ‘meeting’ button.

2

Find the appropriate meeting and select the ‘start’ button.

3

Select ‘Call using Internet Audio’.
Open the Zoom app, sign in if required, and select the ‘meeting’ button.

The toolbar shows your options. You can click ‘unmute’ to speak or ‘start video’ to turn your camera on. You can end the meeting by selecting ‘Leave Meeting’.
Setting Meeting Templates

1. In the meetings/webinars go to schedule a new meeting/webinar button.

2. Fill out Topic: (e.g. Follow-up appointment)

   Fill out Description: We recommend putting the following into the description:

   Topic: Describe the purpose of the appointment (e.g. Follow-up)

   Description (Copy and Paste)

   1. Prior to appointment, please download Zoom onto your mobile device or desktop. The app can be downloaded through your app store, and Zoom Client for Meetings can be downloaded for desktop at: https://zoom.us/download#client_4meeting

   2. Please test your Zoom connection to ensure your camera and microphone are working by visiting: https://zoom.us/test

   3. Please review the user guides and privacy/security considerations, and resources for having a Zoom meeting at: http://www.vch.ca/your-care/virtual-health

3. Click ‘Save’.

4. You are taken to the 'manage my meeting' page. Scroll down and find the 'Save this meeting template' button.

   * Notes: you can save up to 40 meeting templates. If your personal meeting ID is turned on for 'all meetings', you are not able to create a template. This setting can be adjusted in your profile.
AS A PATIENT/CLIENT

(Demo)
Confirming Your Appointment

1. You will receive an email from your healthcare provider to confirm your appointment. When you open the email, you will see a link and follow the instructions.

   Hi there,
   You are invited to a Zoom video visit appointment with your care provider.
   When: Feb 3, 2020 09:00 AM Vancouver
   Topic: Healthcare Appointment

   Please confirm your appointment by clicking this link:
   https://zoom.us/webinar/register/WN_XXwocW6d2TaoZFLxDok7ibqQ

   After confirming your appointment, you will receive an email containing information about joining the your appointment.

2. Enter your information.

   Webinar Registration
   Topic: Clinic Visit
   Description: Please download the Zoom App and/or web browser before your first appointment. You can test your settings by clicking this link: https://zoom.us/test
   If you have any questions/concerns please call the clinic at: 604-675-X00X
   Time: Feb 3, 2020 10:00 AM in Vancouver

   Required information
   First Name
   Last Name
   Email Address
   Confirm Email Address

   Register
Join a Meeting from a Computer

1. You will receive an email from your healthcare provider. When you open the email, you will see a link to the Zoom meeting. Click the ‘Join Zoon Meeting’ link.

2. Your may be prompted to download and run the program.

3. Select the ‘Computer Audio’ tab and click ‘Test speaker and microphone’.

*Note: If steps #4-6 do not work for you, please skip to step #7 to join by phone.
4 You will see a screen that asks if you hear a ringtone. Ensure that your volume is turned up. When you are able to hear the ringtone, click ‘Yes’.

5 You will see a screen that instructs you to speak. If you hear the replay, click ‘Yes’. You will now see a screen that confirms your speaker and microphone are set up. Click ‘Join with Computer Audio’.

6 The toolbar shows your options. You can click ‘unmute’ to speak or ‘start video’ to turn your camera on.

   *Note: If you are unable to get your computer speakers and microphone set up, or if the sound quality is not great, you can join the meeting by phone.

7 Open the incoming email from your healthcare provider. When you open the email, you will see dial-in phone numbers and a meeting ID. Dial the Canadian phone number and enter the meeting ID to join the meeting.
Join a Meeting from a Smartphone or Tablet

1. You will receive an email from your healthcare provider. When you open the email, you will see a link to the Zoom meeting. Click the ‘Join Zoom Meeting’ link.

2. A pop up will appear asking you to enter your name. This name will appear on the healthcare provider’s screen so that they are aware who has joined the meeting. Enter your name and click ‘continue’. Another pop up will ask to access your microphone, click ‘OK’.

3. You will see a screen that gives you options to join the meeting. Select ‘call using internet audio’. You should now see a large image from the healthcare provider’s camera in the middle of the screen, and a small image from your camera in the corner.

4. The toolbar shows your options. You can click ‘unmute’ to speak or ‘start video’ to turn your camera on. Click the ‘leave meeting’ button to leave the meeting.
Appendix A – Guidelines

These Zoom Guidelines must be used by Vancouver Coastal Health (VCH) staff and physicians when communicating by video conference with clients, patients or residents; family members or representatives; other care providers; and/or staff members; and in conjunction with the VCH / PHC External Telehealth Videoconferencing policy, VCH / PHC Emailing policy and the Province of BC Health Authorities Telehealth Clinical Guidelines.

NOTE: For the purposes of these guidelines, “clients, patients, or residents” also includes their family members or representative.

If you have any questions regarding the information in these guidelines, contact:
- PHC Information Privacy Office: (604) 806-8336 or privacy@providencehealth.bc.ca
- VCH Information Privacy Office: (604) 875-5568 or privacy@vch.ca

General Guidelines:

Zoom should only be used for appropriate clinical scenarios, when the clinical interaction does not require physical examination or the application of peripheral diagnostic equipment. Appropriate scenarios will be defined by each clinical program area.

Notify the client, patient or resident of the risks of using Zoom prior to any video conference communication (Notice: Using Zoom to Communicate with your Health Care Provider). Limit Zoom communications to information necessary for the effective provision of care within a videoconferencing environment.

Document any clinically significant information in the Client, Patient or Resident’s chart, as you would in a face-to-face or other Telehealth consultation. Report any actual or potential privacy breaches associated with Zoom to the VCH Information Privacy Office, as per IM_342: Reporting and Management of Information Privacy Breaches.
Staff Guidelines for setting up and using Zoom:

- Ensure the client, patient or resident email address, which is required to initiate a Zoom videoconference, is collected and stored in a secure fashion, ideally within the client, patient or resident’s chart or electronic health record.
- Authenticate the owner of the email address. This may be accomplished by:
  - Sending an initial email to confirm the right person is being contacted prior to sending the videoconference invite or any personal information, or
  - Asking the client, patient or resident to verify a piece of information that only they would know (i.e. date of birth, date of last appointment, middle name, etc.) by text or phone.

- **Do not record the Zoom clinical interaction.** In cases where video recording is necessary, contact the Privacy Office for a privacy review.
- When you initiate the call, inform/introduce the individual to all those participating in the call.
- Screen sharing is a function of Zoom. Ensure all other programs such as Microsoft Outlook email/calendar and other documents that may contain personal or confidential information are closed before initiating screen sharing.
- Ensure that the meeting invite, which contains the email address, is deleted out of the Staff member’s Outlook calendar after the meeting has taken place.

Prior to Communicating via Zoom:

- Discuss the specific clinical purposes for the Zoom videoconference(s) with all parties.
- Gather the necessary information (email address) to connect with the individual.
- Communicate the common risks of Zoom communications and provide client(s), patient(s), and resident(s) with the Notice: Using Zoom to Communicate with your Health Care Provider form via email.
- Confirm with the client, patient or resident that they have read the notice and would like to proceed with Zoom video conferencing.
- Inform the client, patient or resident when the Zoom interaction will occur or how a session will be scheduled.
- Schedule and send the meeting invitation to the client, patient or resident confirming the date and time of the Zoom interaction.

See appendix B – Patient Notice of Video Appointment
Appendix B – Patient Notice of Video Appointment ......

Dear Patient,

Vancouver Coastal Health (VCH) is working hard to provide patients with opportunities to have convenient and reliable access to healthcare services. In our review, we have determined that you are a good candidate for a video visit for your appointment. Please let us know if you prefer to have an in-person hospital visit.

To be successful in having a video visit, you will need the following equipment:

- Email
- Tablet, smart phone or computer
- Access to Wi-Fi internet
- A private space for your conversation

If you do not have this equipment, you may prefer to come into an office or hospital to meet with your healthcare provider.

In accordance with the Freedom of Information and Protection of Privacy Act, we will collect the personal information to confirm your identity and enable you to access virtual health visits. We may send you the registration invitations, appointment reminder notifications, and survey links to the email address you provided to us. We will only send information to the personal webmail address which you have provided to us. All of the information which you provide to us, including information about the care you receive, will be kept completely confidential.

Our intention is to improve your access to healthcare services through the use of technology and improve your overall healthcare experience. We realize that with the use of new technologies, things may not always go to plan. We are committed to assisting you through this process.

More information regarding privacy/security can be provided on request. If you have any questions or concerns about your appointment or would prefer to book an in-person visit, please inform us when we call you to book your appointment.
Using a Video Appointment to Communicate with your Health Care Provider

Vancouver Coastal Health (VCH) staff and physicians are committed to making care easy for you while protecting your privacy. We are using video appointment technology called Zoom, which can come with some risks or limitations.

What you need to know:
- We want the technology to be successful and simple to use. If it’s not, please let us know.
- Sometimes, a video appointment isn’t appropriate for care. We will only offer this type of visit if we think it is a good option for you.
- You do not have to have a video appointment, if you prefer to meet in person, let us know.
- Sometimes technology does not work, and there could be unexpected problems. We will do everything in our power to minimize a problem with technology.
- If for any reason the technology does not work, your team will arrange an alternative appointment.
- All the rules that apply to the practice of medicine in the province of BC apply to the use of technology and video appointments (e.g. documentation in the health record).
- Your care team will inform you if any other person(s) can hear or see any part of the conversation before the session begins.
- For your video appointment, you will need suitable Wi-Fi or network access. VCH cannot cover any data service costs associated with video appointments. Please note that Wi-Fi networks in public spaces (e.g. coffee shops) may be unsecure.
- Although security measures such as encryption is used to safeguard communications, “perfect security” does not exist on the internet and VCH cannot guarantee the security of the information you share over the internet.
- Like other mobile applications, the Zoom application requires permissions to access content on your phone to function. For example, permission to access the camera and microphone enables users to have the video appointment.

Contact Information

We welcome your comments and questions regarding video appointments between patients and VCH care providers. If you have questions regarding privacy or security, please contact us at the following:

VCH Information Privacy Office

Phone: (604) 875-5568   Email: privacy@vch.ca
Appendix C – Resources

**Zoom Support**
- Getting Started
- Audio, Video, Sharing
- Meetings & Webinars
- Zoom Phone

**Zoom Web Portal**
- **Zoom FAQ**
- Zoom Video Tutorials
- Live Tutorials

**Virtual Health- Intranet**
- Manual
- License Requests
- Guidelines, Patient Notice