



Zoom Instructions & Training For Avow Staff

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Hello everyone!

Because Zoom is up and running strong, we are ready to roll it out to everyone who needs it. We will also stop using GoToMeeting and conference lines effective Monday, April 13, 2020.

It is important to note that there are two types of Zoom accounts: Basic & Licensed. Both types follow HIPAA and are covered under our organization's compliance program. The differences in account types is listed below, as not everyone has the same.

With a Basic Account, you can host your own meetings, with some limitations. If there are more than two participants in a meeting, the meeting length is capped at 40 minutes. Use a Basic Zoom account for triaging, rounding, patient/family communication & training, F2Fs, department meetings, etc.

With a Licensed Account, you can host your own meetings for unlimited amounts of time with a group of participants (up to 300). As needed, a licensed account holder may be requested to **assist in scheduling** a Basic Account Holder's meeting, if the situation calls for this. The Basic account would still be considered the "host." Avow has a limited number of Licensed Accounts. They are most appropriate for team meetings (IDTs), Grief & Avow Kids support groups, Incident Command meetings, Virtual Orientation, and similar meetings with multiple attendees who need to connect for an unlimited amount of time.

Both Basic and Licensed accounts can only host one Zoom meeting at any given time. We have preset certain features for you so you don't have to worry about them. For example, we have disabled recording, set 'mute attendees upon entry into the meeting' and more. If you have questions, please ask.

How to Start with Zoom

You will receive an activation email to set up your Zoom Telehealth account. After you activate your account, you will receive training handouts for conducting and hosting your own easy-to-use video visits with your patients, their families, your peers, and other colleagues. Zoom is available via your Avow devices (phone, iPad, and laptop).

We encourage you to download the Zoom application on your work mobile device, or work tablet to make it easier in the next steps outlined. ***To do this, please reference the Avow Information Technology handout provided.***

Please also review these materials:

- Licensed staff members to assist with larger meetings
- Clinician Usage and Next Steps
- Tips and Feedback of Zoom
- Patient & Family Instructions



Devices and Other Important Features

If you need to host your meeting with video and are using your **work computer** - make sure you install the Zoom application (zoom.us/downloads) and **always open the app outside of the remote desktop**. This is necessary to be able to use your computer's microphone and camera. To do this, minimize your RDS and then open the Zoom application. You may still reopen your RDS while you're connected to your Zoom call, as normal.

NOTE: If you are using Zoom on your mobile device, this does not apply.

IT Instructions

Avow IT (Information Technology) has pushed the Zoom app to all corporate devices.

If you do not see the Zoom app icon, you can install it from the **Maas360** (Mobile Device Management) application.

How to install Zoom from Maas360:

1. Open maas360 application on your phone



2. Select App Catalog
3. Scroll down until you find "**Zoom**"
4. Tap on the three dots next to the app and hit "**Install**"
5. This will redirect you to the Google Play Store to complete the installation
6. Once installed, click "Open"
7. Application will start



Zoom Basic Training

Overview

Zoom is teleconferencing software that allows for video/voice chatting. Its biggest advantage is that it works across platforms, so an iPhone, Android smartphone, iPad, Windows computer, and/ or tablet can all be part of the same video conference without conflict.

It is still recommended to use FaceTime capabilities with Apple to Apple products. i.e. an iPad tablet to an iPhone.

Scheduling Access

You have been assigned a Basic or Licensed account through Avow.

A **Basic** account allows you to host your own, unlimited 1:1 meetings. When there are three or more participants in a Basic account meeting, however, meetings cannot be longer than 40 minutes.

Basic accounts are best suited for individual triaging, virtual visits, IPU rounding, patient/ family communication/ training, etc.

A **Licensed** account allows you to host your own meeting, or for others to host meetings with an unlimited number of participants and no limits on meeting length.

Licensed account meetings are best suited for IDT meetings, Bereavement & AvowKids support groups, Incident Command meetings, orientation, etc.

Special Note: There is a limitation that only allows for one meeting at a time. For example, neither account type will allow you to schedule two meetings for 10:00 am. You cannot host or participant in more than one meeting at a time.

Devices

Zoom has apps and software for all devices. When using the scheduler dashboard (more information below), you will be best served using a computer.

Apps for mobile devices (phones, tablets, etc) are easy and simple to use for joining meetings, but are harder to use when scheduling meetings.

Zoom must be accessed via a company issued device. When using a company-issued laptop, please remember that you cannot use Zoom video capabilities while inside the RDS. The Zoom app must be opened outside of the RDS to work properly.



Scheduling A New Meeting

1. From your Zoom app home screen, click “Meetings.” You may now schedule a new meeting.
2. Enter a title/topic for your meeting. If you are setting up a virtual visit, use the virtual visit code associated with that meeting. For example, if you are case manager completing a virtual visit (RN10HV), then your meeting description will be “RN10HV”.
 - a. **Do NOT include patient information into your meetings**
 - b. **Use the Virtual Visit Code sheet provided.**
3. Select the date and time for the meeting (make sure Eastern time zone is selected).
4. Uncheck the boxes for “Recurring Meeting” and “Registration Required.”
5. Make sure “Generate Automatically” for the meeting ID is always checked (this ensures meeting privacy and security).
6. Make sure “On” is checked for both host and video participants (this ensures easy connectivity).
7. Make sure “Both” is selected for audio types.
8. Under meeting options, select whichever options are required/preferred:
 - a. **“Enable Join Before Host”** → This allows participants to join before you, in case you are running late. Selecting this will make sure it’s as easy as possible for participants to join.
 - b. **“Mute Participants Upon Entry”** → This makes sure that mics are always muted automatically. This will enable the smoothest moderation of large group by cutting down on unwanted cross-talk at the start of the meeting.
 - c. **“Enable Waiting Room”** → This feature is unnecessary, and should always be unselected.
 - d. **“Only Authenticated Users Can Join”** → This prohibits anyone from joining your meeting unless they have a free or licensed account with Zoom. Unselecting this option makes it faster and easier for your participants to join because they will not be required to create an account with email and password to participate.
9. If you have the option to select a Calendar, choose “Other Calendar.” In the next step, you will be given the option to copy the email invitation or just close it.
 - a. If you are hosting in internal meeting between peers, you could select “Outlook” and invite them through Avow’s Active Directory features. Be sure to include any agenda, links, and/or the Zoom disclaimer. See below for the wording of the Zoom disclaimer.
10. Hit “Save” or “Schedule.”



You have now scheduled a meeting.

From the home screen of your Zoom app, you can now click “Meetings” to see the meeting you created. When you click on that meeting, you will find the meeting information page with the web link for the meeting, as well as the new Meeting ID number (9-digit code) and password. You can share all of these with participants to enable them to join your meeting.

You may also delete or edit this meeting before it starts – you can change details, features, etc.

Important: When creating and sending out Zoom invites, the following disclaimer must be included in the body of the message.

Avow provides Zoom Telehealth-based meetings for virtual visits, support groups, and other virtual healthcare related support. Zoom must comply with Health Insurance Portability and Accountability Act (HIPAA). With a HIPAA Compliant Business Associate Agreement (BAA), which Avow has in place with Zoom, Zoom provides a complete end-to-end 256 bit AES encryption. Avow maintains privacy and security with the utmost integrity and meets all HIPAA security and privacy rules.

If you have any further concerns, or questions, please review Zoom’s Privacy Policy. <https://zoom.us/privacy>

Hosting a Meeting

As the host of a meeting, you have certain capabilities:

- Muting all participants
- Sharing your screen (other participants can use this as well)
- Switching between “Gallery View” (which shows all the participants in the call at the same time) and “Speaker View” (which will constantly change the video to whoever is speaking at the time).

Please review the “Zoom Tips & Feedbacks” and “Things to Consider” documents as they outline many helpful tools when hosting a Zoom Telehealth meeting.

Virtual Visit Codes

RN00HV – Registered Nurse Start of Care Virtual
RN10HV – Registered Nurse Virtual Visit
RN02HV – Registered Nurse Recert Assessment Virtual
RN70HV – Registered Nurse Continuous Care Virtual Evaluation
SN11HV – Skilled Nurse Subsequent Virtual Visit
SNPRNHV – Skilled Nurse As Needed Virtual Visit
SNFOCUSV – Skilled Nurse Focus Virtual Visit
MS11HV – MSW Subsequent Virtual Visit
MS01HV – MSW Add-on Evaluation Virtual Visit
MSPRNHV – MSW PRN Virtual Visit – As Needed
CH01HV – Chaplain Add-on Virtual Evaluation
CH11HV – Chaplain Subsequent Virtual Visit
CHPRNHV – Chaplain PRN Virtual Visit – As Needed



MU01HV – Music Therapy Add-on Virtual Evaluation
MU11HV – Music Therapy Subsequent Virtual Visit
MUPRNHV – Music Therapy PRN Virtual Visit – As Needed
AR01HV - Art Therapist Add-on Virtual Evaluation
AR11HV – Art Therapist Subsequent Virtual Visit

Licensed Account Holders

Administrator – Kerri Ervin

Support– Kirsten Elser

Executive Leadership – Pam Hafner

Clinical Operations (includes Comp Therapy & PIC) – Miguel Gonzalez, Ashley Howenstein, & Cynthia Ramirez

Supportive Services (BRV & AvowKids) – Patricia Childress & Jessica Yarab

Palliative Care (includes Medical Services & Billing/ Accounting) – Melissa Taylor & Stacy Mendoza

Foundation & Volunteer Services – Annalise Smith

Education/ Virtual Orientation – Karen Rollins

Service Integrity, HIM, QAPI, Safety, & Board of Directors – Barbara Bacigalupo



Zoom Video Visit User Guide - Clinician

Getting Started:

1. Ask the patient/family if they would be willing to participate in video conferencing visits. Check in patient's medical record under Coordination note "Video Visit..." to see updated contact.
2. Using your work phone or iPad, open the Zoom app. **See Information Technology's attachment for further instructions.** We recommend that you log in a few minutes before the meeting is scheduled so you're ready to go when the meeting starts.
3. Read through all the Zoom reference materials as they will be helpful to you when you have to host a Zoom meeting.
4. **Important to note:** DO NOT make a "Free" Zoom account with your personal information or email address. If you use Zoom on your own account or with a personal device, it will NOT be HIPAA Complaint. Your visit will not be under the Zoom Telehealth regulation. You are responsible for hosting only encrypted Zoom meetings and using the Avow assigned technology given to you. Anyone not following these practices will be held accountable.

How to Schedule a Video Visit Using Zoom:

11. From your Zoom app home screen, click "Meetings." You may now schedule a new meeting.
12. Enter a title/topic for your meeting. If you are setting up a virtual visit, use the virtual visit code associated with that meeting. For example, if you are case manager completing a virtual visit (RN10HV), then your meeting description will be "RN10HV".
 - a. **Do NOT include patient information into your meetings**
 - b. **Use the Virtual Visit Code sheet provided.**
13. Select the date and time for the meeting (make sure Eastern time zone is selected).
14. Uncheck the boxes for "Recurring Meeting" and "Registration Required."
15. Make sure "Generate Automatically" for the meeting ID is always checked (this ensures meeting privacy and security).
16. Make sure "On" is checked for both host and video participants (this ensures easy connectivity).
17. Make sure "Both" is selected for audio types.
18. Under meeting options, select whichever options are required/preferred:

- a. **“Enable Join Before Host”** → This allows participants to join before you, in case you are running late. Selecting this will make sure it’s as easy as possible for participants to join.
 - b. **“Mute Participants Upon Entry”** → This makes sure that mics are always muted automatically. This will enable the smoothest moderation of large group by cutting down on unwanted cross-talk at the start of the meeting.
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19. If you have the option to select a Calendar, choose “Other Calendar.” In the next step, you will be given the option to copy the email invitation or just close it.
- a. If you are hosting in internal meeting between peers, you could select “Outlook” and invite them through Avow’s Active Directory features. Be sure to include any agenda, links, and/or the Zoom disclaimer. See below for the wording of the Zoom disclaimer.
20. Hit “Save” or “Schedule.”

You have now scheduled a meeting.

From the home screen of your Zoom app, you can now click “Meetings” to see the meeting you created. When you click on that meeting, you will find the meeting information page with the web link for the meeting, as well as the new Meeting ID number (9-digit code) and password. You can share all of these with participants to enable them to join your meeting.

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How to Initiate the Zoom Visit on the Scheduled Date/Time:

- a. Call the patient/family prior to the scheduled video visit to determine their readiness to access the visit on their device(s).
- b. Ask if they received your email with the link, meeting ID, and password to join the meeting
- c. Refer them to the [Zoom Video Visit User Guide – Patient/Family for instructions](#). **See provided attachment.**



To initiate the Video Visit from the Computer or Mobile Device:

Click on the link from the invitation on your calendar and follow the prompts.

Assist the Patient/Family as Needed to Access the Meeting Room by Clicking on the Link.

- a. The link has been set up to turn on audio and video automatically for the meeting.
- b. You may have to help the patient/family find the volume control on their device to increase it for the visit. It is typically on the bottom task bar.
- c. Use the "Zoom Tips & Feedback" & "Patient Instructions" sheets to trouble shoot.
- d. If any party is having trouble with access, audio or video at the start of the video visit, contact the IT department, or IT On-Call.

After the Video Visit is Completed:

- a. When documenting your visit, you must include within your visit note, that "this visit was conducted via video conferencing".

Tips & Feedback

1. **Before working with others, check out Zoom using different devices.** Use Zoom from your Samsung phone, from an iPhone, a tablet and a computer. Access the meeting through a direct link, with a password, etc. and see what pops up on the screen. What looks different? A new user might ask, “What am I supposed to do now?” If using a computer, they may have settings that need to be adjusted. (And of course, my favorite, they may need to turn volume up, if they can’t hear you).
2. **Not all Zoom technology is the same.** People using an app on their cell phone have to have the right Zoom app. iPads, iPhones, & Macs are different from Google tablets, laptops, & Android phones. Some have found that the easiest way to Zoom is from a Google laptop. All programs integrate the same, but viewable options can vary in placements.
3. **Not everyone wants to learn how to use Zoom.** For some, Zoom is intuitive and for others it is not. We serve a population which largely consists of older people who may not be comfortable using technology. It can be frustrating to figure out some of the buttons, bells and whistles. Many of the individuals we serve have expressed positive feedback and appreciate that we are using this technology to continue meeting their diverse needs. They may still need extra patience and time to educate/ train on how to use this new technology.
4. **Poor WiFi can make Zoom difficult.** The person’s screen can freeze, or their speech can be “stuttered.” If someone is experiencing a slow connection, you may suggest they find a place closer to the WiFi connection. Zoom meeting settings can be used for different audio and video to improve quality.
5. **The host or co-hosts have all the super powers.** These include muting and unmuting individuals or the entire group, if needed. See Zoom training webinar & resources provided to see the different capabilities to meet your meeting focuses.
6. **Logging In.** Find the cleanest way to invite users. The typical invitation can have as many as ten phone numbers, a link, room ID and password. *Delete what you do not need before sending an invitation.
7. **The Direct Link.** The primary way to enter a group meeting room is through the direct link provided by Zoom. This makes it less likely for participants to enter the wrong room.
8. **Invite attendees to join the meeting 15 minutes early.** As they enter the room, test their microphone, speaker and camera. Ask if you can edit their name, change their background, set up a picture instead of video, and so forth. Personalization possibilities are endless! Set the group up for success early, instead of taking the time in the actual group session.
9. **Consider your environment.** Consider your lighting, your background; dress professionally and enhance your features. Wearing eyeglasses may cause glare and distraction. Avoid areas of your home that have personal information such as family photos, etc. that you may not want others to question.

10. **Create some guidelines for group facilitation and let the group know.** At the start, offer group guidelines. Set an intention for the meeting, announce a disclaimer, set time limits, set up group participation cues (calls “in” or “out” after a speaker, raise hand, use chat box), etc.
11. **It only takes a couple of quick reminders** once all is working.
12. **Teach mute (on/off)** Due to struggles with mute (on or off) and limited body language, figuring out who speaks next is challenging. Part of the joy is in the human sounds. We can hear everything. So teach mute and unmute for those in noisier environments.
13. **There can be “order” in a Zoom room.** It’s hard to create order of speaking in a Zoom room.
 - Utilize the chat text box at the bottom of the screen and inquire about who has commentary of proposed topic. (e.g Facilitator: “If you’re interested in talking about ___, comment your name below”. Group members respond. Facilitator: “Ok, we’re going to go Natalie, Miguel, Breanna”).
 - Someone can say “Ok, that’s my piece”, signaling that they have finished their thought and are looking for interaction from other attendees.
 - Raise your hand in front of camera in a smaller group to signal you would like to speak
 - Teach and reinforce proper turn taking/no side conversations and how to limit distractions.
 - Leader will need to be more directive.
14. **Break out groups exist.** Groups as large as 82 members have been utilizing Zoom. 20 “squares” of people fill the screen; you pan over to see others, so you are not seeing all 82 people at once. If you have the video setting set to speaker, then you see the screen move and rotate when one person is speaking. There is also an option for break out groups if it is too large for one facilitator. All attendees would start the group together, then break out into two groups with two facilitators, & come back together at the end of group.
15. **Make it fun.** Consider an icebreaker, laughter, funny signs to get things started. The Communications Department can also provide some fun background images if you request.