Zoom

Clinician Guide to Zoom for Telehealth

This guide is a quick reference for clinicians to provide telehealth services using Zoom via a computer or laptop. (Note: The ability to provide and report telehealth services by clinicians is a temporary allowance by the State due to COVID-19.) If you've not yet logged in to your Zoom account, please see the *Activating Your Zoom Account Quick Start Guide.*

Contents

Important Notes Before You Get Started

Run Zoom Directly from Your Computer: If you are accessing and using Zoom from a remote location, be sure to run it off the browser on your local desktop, laptop, or mobile device. **Do not remote in to your CMHA-CEI desktop and then use the browser on your remote session.**

Computer Audio and Video Functions: A webcam, audio, and microphone functions are essential for the provision of telehealth services. If you are on a computer, whether desktop or laptop, please ensure that the computer has a working webcam, speakers/audio, and a microphone. A separate set of headphones, preferably with a built-in microphone may be helpful for better sound.

<mark>Before hosting a telehealth session, be certain that the client has received the *Clients' Quick Guide to Zoom*, and that you have the client's email address to send them the Zoom meeting invitation. If you cannot email the client, you will need to call them with the Zoom meeting ID# so they can access the telehealth session.</mark>
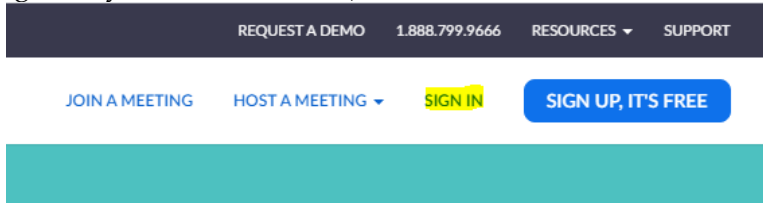
Client or Guardian Consent for Telehealth

Make sure you get verbal consent to conduct the service via telehealth. When you enter your note in SmartCare, you can use the following verbiage:

The Consumer/Guardian has agreed to the appointment via tele-health. Current symptoms/needs/agenda is being managed by tele-health. If status changes, consumer/guardian/family will contact this clinician to discuss prior to future appointments.

Scheduling a Zoom Telehealth Session from a Computer

1. **Sign in to Your Zoom Account**
   On your computer, open **Chrome** and go to the URL https://www.zoom.us (See *Note* above regarding using local your web browser.)

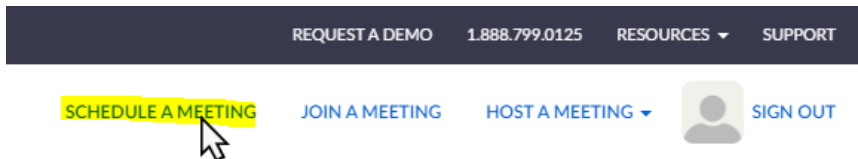 | | | | |
   |---|---|---|---|
   | REQUEST A DEMO | 1.888.799.9666 | RESOURCES ▼ | SUPPORT |
   | JOIN A MEETING | HOST A MEETING ▼ | SIGN IN | SIGN UP, IT'S FREE |

   Click the **Sign In** link at the top right of the page, enter your Zoom credentials, and click the **Sign In** button.

   Remember that your Zoom password should not be the same as your CMHA-CEI password.

2. **Create a Scheduled Meeting**
   On a computer, after logging in, you will be taken to your Zoom Profile page, at the top right side of the page, click on "**SCHEDULE A MEETING**."

REQUEST A DEMO	1.888.799.0125	RESOURCES ▼	SUPPORT
SCHEDULE A MEETING	JOIN A MEETING	HOST A MEETING ▼	SIGN OUT

3. **Complete the following fields**
   a. **Topic** – A brief description of the meeting's purpose.
      Note: Do NOT include any identifying or private health information in the meeting description or topic.
   b. **When** – The desired date and start time of the meeting. You may schedule meetings for the same day or any day in the future.
   c. **Duration** – The expected length of the meeting. It is recommended to set this a little longer than actually expected to allow for session overages.

   Schedule a Meeting

   Topic   My Meeting

   Description (Optional)   Enter your meeting description

   When   03/13/2020   3:00   PM

   Duration   1   hr   0   min

The rest of the options are set by default according to organizational standards and should not need to be changed.

d. **Alternative Hosts** – If you are scheduling this meeting on behalf of another staff member who is expected to be the host, please enter their email in the alternative hosts field.

Alternative Hosts	Example: mary@company.com, peter@school.edu

4. **Save**

Scroll to the bottom of the page and click "**Save".**

Save	Cancel

After you click save/done, you will be taken to the manage meeting summary, from here you will be able to manually start the meeting, invite attendees, edit any previously configured settings for the meeting.
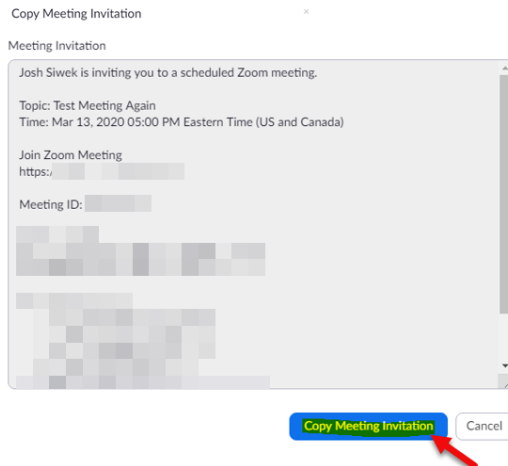
You do not need to manually start the meeting, it will automatically be started at the set date and time, and will start as soon as the creator (or other designated host) joins.

5. **Invite Attendees to the meeting**

a. Click on the **Copy the invitation** link on the right hand side of the page.

Invite Attendees   Join URL: https://zoom.us/j/884403436   Copy the invitation

This will open a pop-up with all the information needed to join the zoom meeting. Click **Copy Meeting Information** to copy the information to your clipboard.

Copy Meeting Invitation

Meeting Invitation

Josh Siwek is inviting you to a scheduled Zoom meeting.

Topic: Test Meeting Again
Time: Mar 13, 2020 05:00 PM Eastern Time (US and Canada)

Join Zoom Meeting
https:/

Meeting ID:

Copy Meeting Invitation   Cancel

b. After clicking Copy Meeting Invitation, you may press Cancel to dismiss the popup. You can revisit this meeting invitation at any time by clicking the Copy the invitation link again.

c. Once you have copied the meeting invitation to your clipboard, go to *Outlook* and create a new email. Use the instructions in the separate guide, *Sending emails from a Generic Account* to send meeting invitations (and the *Client Guide to Using Zoom for Appointments* PDF if needed) from the "**ZoomInvite**" email address. Add all intended recipients, as well as any

alternative hosts you have defined, to the "To:" field and create a subject that lets the recipient know they are being invited to a Zoom meeting and for what purpose. (Do not include any clinical information or PHI in the subject or body of the email.)

Note: Do **NOT** use your ceicmh email or personal email address to communicate with clients. *Also*: If your client needs the *Client Guide* referenced above, be sure to attach it as a PDF. Do not send a link to the document on the Intranet as that is not accessible to clients.

d. In the **body** of the email, **right click** and select **paste**. The contents of the invitation will be pasted into the body of the email, and then **Send** the email.

Start a Zoom Telehealth Session from a Computer

1. Before starting the meeting, please ensure that you are in a secure and private environment where your conversation with clients may not be overheard.

2. **Start the Meeting** – Login in to your Zoom account. Select the Meeting and click Start This Meeting
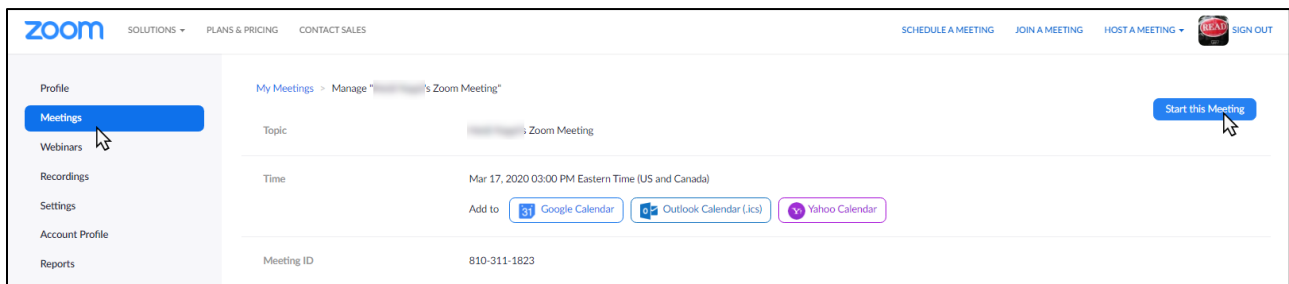

3. **Launch or Open Zoom**, and **Login** – Click Open Zoom Meetings.
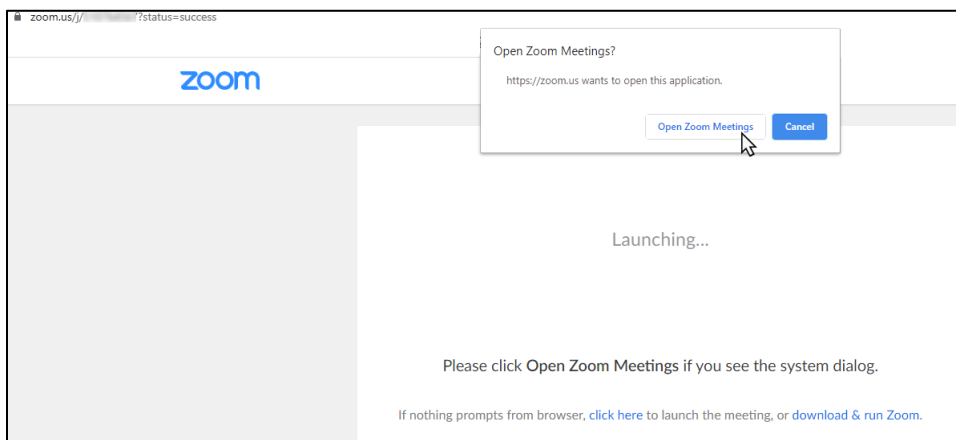
4. **Audio and Video** – You will be prompted to "Join with Computer Audio" when starting a meeting. Do not use the Phone Call option.

5. **Test Audio/Video** – Audio and speaker controls are on the bottom left of the Zoom screen. You may test your speaker and microphone following the instructions as they appear on the screen.

6. **Manage Audio/Video, e.g. Mute, volume etc**. – You may start/stop video and/or Mute/UnMute audio following the instructions as they appear on the screen.

7. **Chat** – If you or the client are experiencing audio problems, you can click the Chat button on the controls on the bottom of the screen -- this will allow you and the client to text in a chat box if necessary.
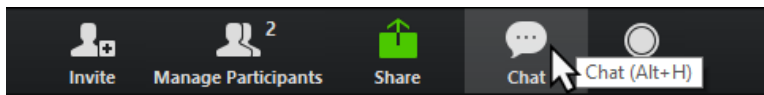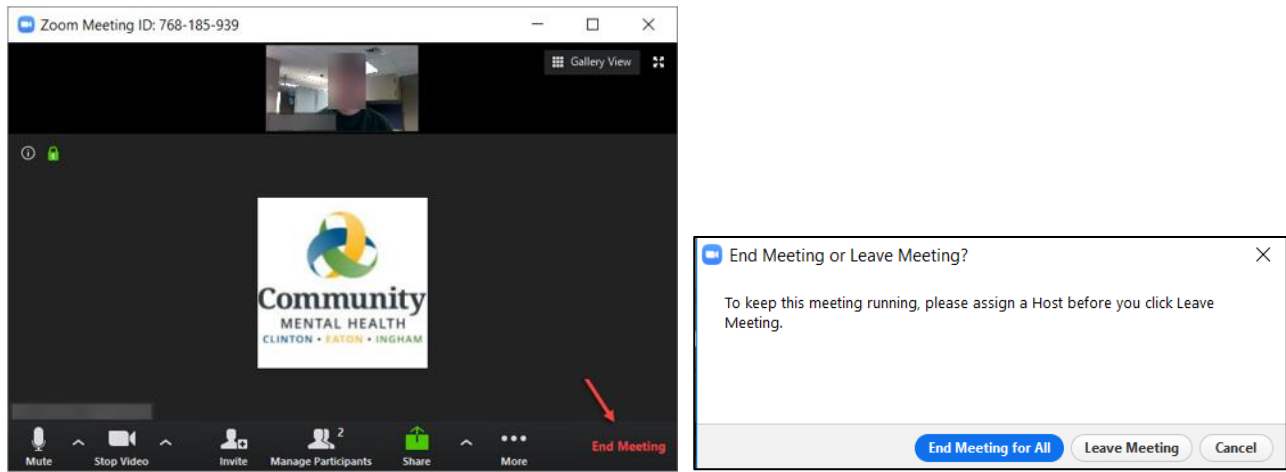

In the Zoom group chat window, there are three ellipses, if you hover over these, you will get a dropdown menu.

Make sure that the "**Allow attendees to chat with**:" is not set to No one.
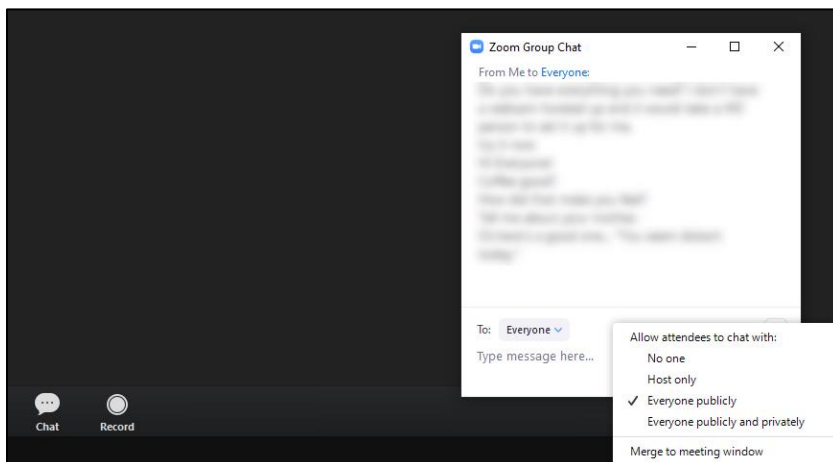
8. **End the Meeting** – When the telehealth session with a client is over, click "**End Meeting**" at the bottom right hand of the screen, then click on "**Leave Meeting**."

Troubleshooting

If you need assistance, please contact Helpdesk at helpdesk@ceicmh.org, or (517) 346-8215.