



# Zoom

## Telepsychiatry User Guide

Issued November 1, 2019

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[www.ceicmh.org](http://www.ceicmh.org)

This guide provides information and instructions for Med Clinic / support staff and psychiatrists to conduct Telepsychiatry sessions within a Zoom Meeting Room.

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## General Information

The following process is in place for CMHA-CEI Med Clinic or support staff and psychiatrists who are providing Telepsychiatry services.

These sessions are conducted via Zoom, a cloud-based meeting room. A **Zoom Meeting Room** is a virtual meeting place that is set up for a block of time, during which one or more Telepsychiatry sessions can be scheduled. A **Telepsychiatry Session** refers to a single remote video meeting between the client and psychiatrist, held inside a Zoom Meeting Room.

Multiple clients can be scheduled for individual Telepsychiatry sessions throughout the day by utilizing one Zoom Meeting Room scheduled by Med Clinic / support staff.

Designated support staff are responsible for setting up the Zoom Meeting Rooms, providing the link to the psychiatrists, initiating the sessions, and adjusting settings as necessary during the session to ensure optimum quality. When Med Clinic / support staff schedule a Zoom Meeting Room, it means the room is open for psychiatrists to provide one or multiple Telepsychiatry sessions within that virtual Zoom Meeting Room.

CMHA-CEI Helpdesk will set up the computer to be used at CMH for the Telepsychiatry sessions. The CMHA-CEI Helpdesk will also assist with any technical problems that Med Clinic / support staff and/or psychiatrists encounter, and will answer any questions relating to the use of the software.

Prior to implementing Telepsychiatry sessions, staff and psychiatrists are encouraged to preview Zoom by taking advantage of online resources and tutorials accessible via their website <https://zoom.us/>. It is also recommended that Med Clinic staff and psychiatrists consider setting up some practice sessions to ensure that each party is set up in Zoom correctly and is familiar with the equipment, application and process for creating an actual Zoom Meeting Room prior to initiating actual Telepsychiatry sessions with clients.

### Getting Started Videos:

<https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials>

Links to some of the most common questions:

<https://support.zoom.us/hc/en-us/articles/206175806-Top-Questions>

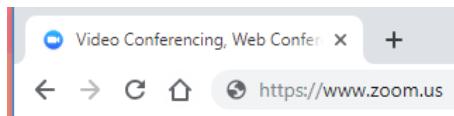
## Med Clinic / Support Staff

### One-time Setup on Zoom.com

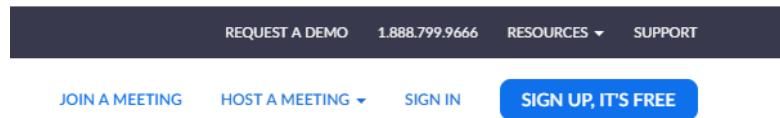
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Med Clinic / support staff who will be setting up the sessions or assisting psychiatrists or clients with their session will need to set up a profile in Zoom. This must be completed the first time you access Zoom.

1. **Open Zoom:** Open Chrome and go to the URL [www.zoom.us](https://www.zoom.us).



2. **Sign up for Zoom:** Click on the SIGN UP, IT'S FREE button



Create a Basic profile at Zoom using your work email address. You will receive a confirmation link from Zoom to continue with the registration process. Create a password to complete your profile.

3. **Set up your profile:**

- a) After the screen updates, click on the **Go to My Account** button

Start your test meeting.

Excellent! Now it's time to start meeting.

Your personal meeting url:

<https://zoom.us/j/8103111823>



- b) Customize your settings so that meeting rooms that you set up will have the correct configuration. It is important to complete this step before scheduling meeting rooms to ensure that the controls will work properly. Go to the Schedule Meeting section and turn on:
- Host video
  - Participants video
  - set Audio Type to Computer Audio
  - Turn on Join before host, and
  - click on **Save**.

Pricing Contact Sales SCHEDULE A MEETING JOIN A MEETING HOST A MEETING SIGN OUT

**Meeting** Recording Telephone

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

**Schedule Meeting**

**Host video**  
Start meetings with host video on

**Participants video**  
Start meetings with participant video on. Participants can change this during the meeting.

**Audio Type**  
Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all participants follow the instructions you provide for using non-Zoom audio.

Telephone and Computer Audio  
 Telephone  
 Computer Audio

**Save** **Cancel**

**Join before host**

**Help**

- f) Then scroll down to In Meetings (Advanced), to turn on Far End Camera Control.

Far end camera control

Allow another user to take control of your camera during a meeting

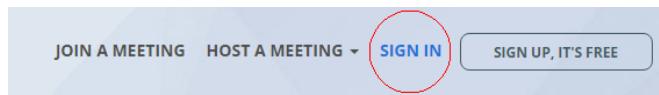
## Scheduling a Zoom Meeting Room

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Med Clinic / support staff setting up the Zoom Meeting Room will need to have set up a Zoom account and configured their settings before they set up a meeting room / session (See the previous section: **One-time Setup**). If your profile has already been created and you are logged in to Zoom, skip to step 2 below. If you already have a Zoom profile and need to log in, start here:

### 1. Login to Zoom

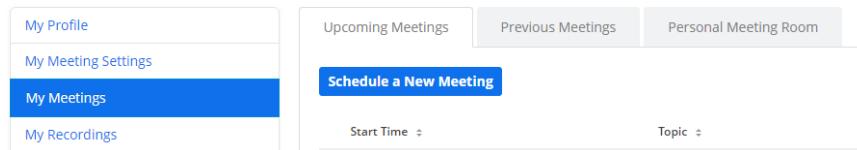
- a) Click on the link [www.zoom.us](http://www.zoom.us).
- b) If not already signed in, click on the SIGN IN link on the right-hand side of the screen to sign in:



- c) At the Sign In page, enter your credentials and click **Sign In**.

The screenshot shows the Zoom 'Sign In' page. It has fields for 'Email address' and 'Password', both with copy/paste icons. Below the fields is a large blue 'Sign In' button. At the bottom left is a 'Forgot password?' link, and at the bottom right is a checked checkbox for 'Stay signed in'.

### 2. From the navigation bar on the left side of the screen, click on **My Meetings**, then **Schedule a New Meeting**.



### 3. Create the Zoom Meeting Room: On the Schedule a Meeting page, fill out the following fields:

- a) **Topic:** Med Clinic / support Telepsychiatry (*Note: Do not add any Protected Health Information, such as client name or ID.*)
- b) **When:** Verify the correct date and time are selected.
- c) **Duration:** Set the session for at least an hour. You may set it for the duration of the day if you expect multiple Telepsychiatry sessions to occur throughout the day. If the Zoom Meeting Room is set for the day and there is a two-hour 10:00 a.m. session and a two-hour 2:00 p.m. session, you can either follow the instructions in the **Multiple**

**Telepsychiatry Session** section on page 18 or close Zoom and then re-access the meeting by clicking on the session link in the e-mail invitation.

d) Make sure the other settings look correct.

e) Scroll to the bottom and click **Save**.

My Meetings > Schedule a Meeting

Schedule a Meeting

Topic  **a**

Description (Optional)

When    **b**

Duration     **c**

Your Zoom Basic plan has a 40-minute time limit on meetings with 3 or more participants.  
Upgrade now to enjoy unlimited group meetings. Contact [Info Services Department](#)

Do not show this message again

Time Zone

Meeting ID  Generate new meeting ID  Personal Meeting ID (PMI) **d**

Video Host  on  off

Participant  on  off

Audio  Telephone  Computer Audio  Both

Meeting Options

Require meeting password

Enable join before host

Mute participants upon entry

Enable waiting room

Record the meeting automatically on the local computer

**e**

#### 4. Invite the Psychiatrist to the Zoom Meeting Room

In order for the psychiatrist to join a Telepsychiatry session, they must have a link to access the Zoom Meeting Room:

- On the next page after Saving, look for the **Join URL** section and click **Copy the invitation**.

REQUEST A DEMO 1.888.799.9666 RESOURCES ▾ SUPPORT

PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING ▾ SIGN OUT

My Meetings > Manage "Med Clinic Telemedicine"

Topic: Med Clinic Telemedicine

Time: Aug 15, 2019 03:00 PM Eastern Time (US and Canada)

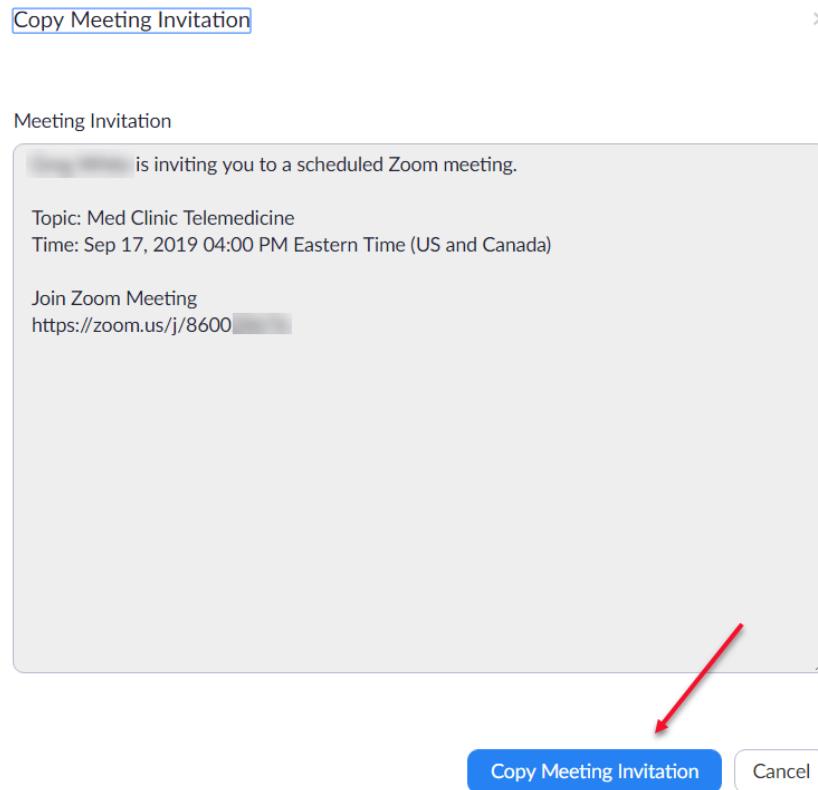
Add to: Google Calendar, Outlook Calendar (.ics), Yahoo Calendar

Meeting ID: 724-434-335

Join URL: https://zoom.us/j/724434335

Copy the invitation

- On the page that pops up, click the **Copy Meeting Information** button at the bottom. This will copy the link and information to your PC's clipboard.



- c) Open MS Outlook and create an email:
- i. Address it to the Psychiatrist that will be performing Telepsychiatry sessions that day
  - ii. Enter the Subject: "Med Clinic / support Telepsychiatry Sessions MM/DD/YY"
  - iii. In the body of the email, enter: "Please use this link to access your Telepsychiatry sessions today."
  - iv. Paste the URL link that you copied from the previous address into the email.  
(From the body of the email, right click and select 'Paste.')
  - v. Send

The screenshot shows an email message with a blue border. The message content is as follows:

Hi, Doctor –

Please use this link to access your Telemedicine sessions today.

Med Clinic staff are inviting you to a scheduled Zoom meeting.

Topic: Med Clinic Telemedicine  
Time: Sep 17, 2019 04:00 PM Eastern Time (US and Canada)

Join Zoom Meeting  
<https://zoom.us/j/860028676>

Regards,

## Scheduling a Zoom Meeting Room for a Psychiatrist

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### *Scheduling Privilege*

#### **Overview:**

Scheduling privilege is designed for a user to:

- Schedule meetings on behalf of a user (or multiple users) that has assigned you scheduling privilege
- Assign or delegate a user or multiple users in your account to schedule meetings on your behalf.

Users with Scheduling Privilege will be able to manage and act as an alternative host for all meetings. If you want others to be able to schedule meeting on your behalf, go to the psychiatrist instruction section on page 24 to see how to set up the scheduling privilege on your profile.

Note: You and the person you are scheduling for must have a Zoom license. If you receive a 3003 error when edit or canceling a meeting for another user, check that scheduling privileges have not been modified. Also, check that you and the user you are scheduling for are both Licensed users.

## Scheduling for another user (Zoom)

5. Sign in to the Zoom Desktop Client.
6. Click on the **Schedule** icon.



7. Click **Advanced Options**.
8. Check **Schedule For**.
9. Choose the user you want to **Schedule For** from the dropdown menu.
10. Click **Schedule** to finish, and open up the calendar you have selected.

## Set up Waiting Room for a Psychiatrist

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Starting September 27, 2020, Zoom will require that all meetings have a Passcode or a Waiting Room enabled for all licensed accounts. If neither is enabled, Zoom will enable a Waiting Room for your meetings. Meeting passcodes are already enforced for all basic accounts.

If you already have a Passcode or Waiting Room enabled your settings will remain the same for your current selection and there will be no change to how you schedule meetings. You can change your security preference at any time.

## The Waiting Room

The Waiting Room feature allows the host to control when participants join the meeting. When participants join a meeting, they are placed in a waiting room and the host is required to admit them. As the meeting host, you can admit attendees one by one, or hold all attendees in the Waiting Room and admit them all at once. Enabling Waiting Room for new or existing meetings does not affect calendar invitations.

### To enable Waiting Room:

1. Sign in to your Zoom profile at the Zoom.com web portal and click on **Settings**.
2. Under the **Security** section, activate the **Waiting Room** function:

The screenshot shows the Zoom profile settings page at <https://zoom.us/profile/setting>. The left sidebar has a blue 'Settings' button highlighted. The main navigation bar includes 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', and 'REQUEST A DEMO'. The 'Meeting' tab is selected. Under 'Meeting' sub-tabs are 'Recording' and 'Telephone'. The 'Security' section is currently active. In the 'Waiting Room' section, there is a blue toggle switch with a red arrow pointing to it. Below the switch, text reads: 'When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.' There is also a 'Waiting Room Options' section with a note about applying to meetings hosted by users who turned 'Waiting Room' on, and a list of options: 'Everyone will go in the waiting room' (selected), 'Edit Options', and 'Customize Waiting Room'.

### 3. Click on **Edit Options** to select who you want to admit to the waiting room:

#### Waiting Room Options

These options will apply to all meetings that have a Waiting Room, including standard meetings, PMI meetings, webinars.

Who should go in the waiting room?

- Everyone
- Users not in your account
- Users who are not in your account and not part of the allowed domains

[Continue](#) [Cancel](#)

Participants will see a pop up dialog that says "Please wait, the meeting host will let you in soon."

Please wait, the meeting host will let you in soon.

Molly Parker's Personal Meeting Room

[Test speaker and microphone](#)

## Set up a Passcode for a Psychiatrist

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### Passcodes

Meetings can require passcodes for an added layer of security. If Passcodes are added to new meetings, the Passcode will automatically be embedded into the meeting link.

**IMPORTANT:** If you add a Passcode to an existing meeting, calendar invites will need to be resent to include the Passcode.

### To enable Passcode settings:

1. Sign into the Zoom web portal and navigate to **Settings**.
2. In the **Security** section, verify that the passcode settings that you would like to use for your meetings and webinars are enabled.

If the setting is disabled, click the toggle to enable it. If a verification dialog displays, choose **Turn On** to verify the change.

### Editing a passcode for a meeting

By default, meetings are assigned a random passcode. You can update the passcode to one of your choosing:

1. Sign in to the Zoom web portal.
2. In the navigation menu, click **Meetings**.
3. Click the topic of the meeting you would like to update the passcode for.

The screenshot shows the Zoom web portal interface. At the top, there are navigation links: 'Upcoming' (which is underlined), 'Previous', 'Personal Room', and 'Meeting Templates'. Below these are search and filter options: a 'Select time range...' input field, a dropdown for 'All Host', and a blue 'Schedule Meeting' button. A 'Today' button is also present. The main area displays an upcoming meeting: '10:00am - 11:00am' followed by the meeting title 'Kyle Anderson's Zoom Meeting', the 'Meeting ID: 9999999999', and the 'Host: Kyle Anderson'.

4. Click **Edit This Meeting**.
5. In the **Security** section, edit the passcode. You can also enable Waiting Room.
6. Click **Save**

### Editing the passcode for your Personal Meeting ID

1. Sign in to the Zoom web portal and navigate to Meetings.
2. Click **Personal Meeting Room**.

The screenshot shows the Zoom web portal interface. At the top, there are navigation links: Upcoming, Previous, **Personal Room** (which is underlined), and Meeting Templates. Below these are three tabs: Details (selected), Poll, and Live Streaming. Under the Details tab, the Topic is listed as "Kyle Anderson's Zoom Meeting". The Meeting ID is partially visible as "981-034-0079". The Join URL is provided as a link: <https://success.zoom.us/j/9810340079>.

3. Click **Edit this Meeting**.

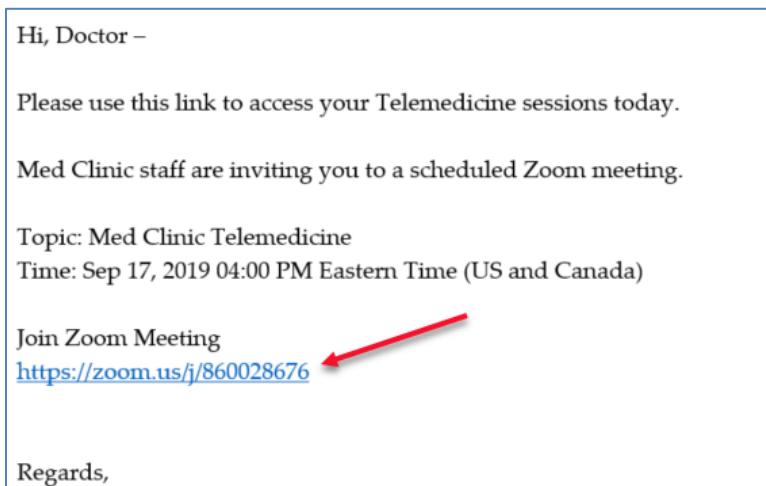
The screenshot shows the "Edit this Meeting" page for a personal meeting. At the top, there are navigation links: Upcoming Meetings, Previous Meetings, **Personal Meeting Room** (underlined), and Meeting Templates, along with a **Join Now** button. The Topic is set to "Molly Parker's Personal Meeting Room". The Time section includes buttons to "Add to" Google Calendar, Outlook Calendar (.ics), and Yahoo Calendar. The Meeting ID is listed as "981-034-0079". The Meeting Password field has a checked checkbox for "Require meeting password". The Join URL is listed as "<https://success.zoom.us/j/9810340079>" with a "Copy the invitation" link next to it. The Video settings show "Host" and "Participant" both set to "Off". The Audio settings show "Telephone and Computer Audio" and "Dial from". The Meeting Options section includes checkboxes for "Enable join before host" (unchecked), "Mute participants upon entry" (unchecked), "Enable waiting room" (checked), and "Record the meeting automatically on the local computer" (unchecked). At the bottom right, there is a red box highlighting the **Edit this Meeting** button, and to its right is a **Join Now** button.

4. In the **Security** section, edit the passcode. You can also enable Waiting Room.
5. Click **Save**.

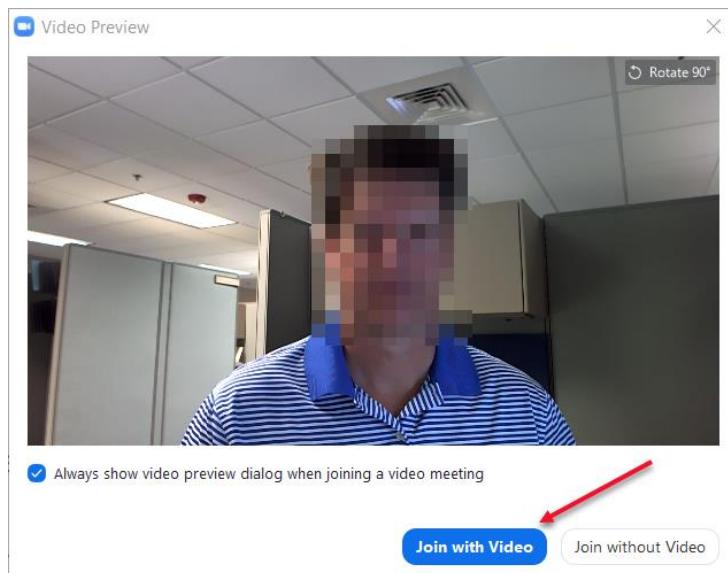
## Helping the Client Begin their Session in the Zoom Meeting Room

### Getting Connected

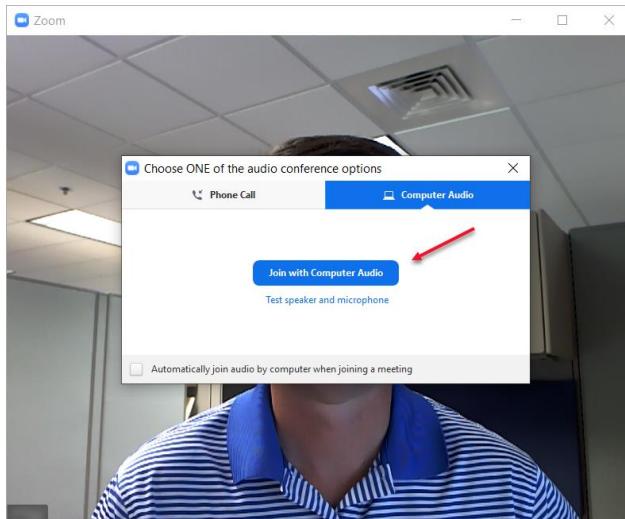
1. **Start the Telepsychiatry Session:** You can start the Telepsychiatry session for the client by logging into the CMH-CEI workstation in the room where the client will be sitting, opening MS Outlook and accessing the email invitation sent to the psychiatrist:
  - Open the email and click the Join Zoom Meeting link:



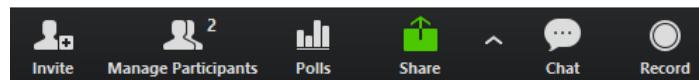
2. A video Preview screen will display. Click on the Join with Video button.



3. When you are prompted to join with audio, click on the **Join with Computer Audio** button.

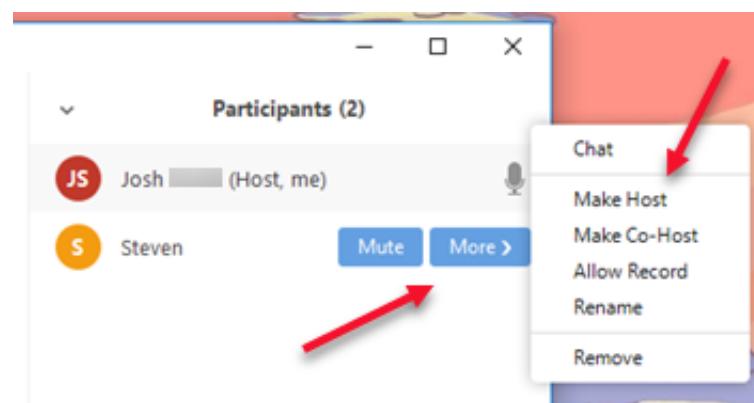


4. You will now wait for the psychiatrist to join. Once they join you will see them in the participant screen. If you do not see the Participants window, click on **Manage Participants** on the bottom menu.

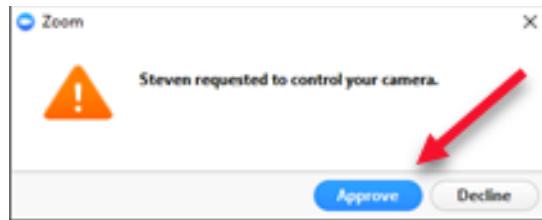


This should bring up the list of participants and you should see the psychiatrist's name in the list.

5. Once you see the psychiatrist's name (showing as Steven below), move your cursor to their name and click **More**. Then select **Make Host**:



6. The psychiatrist is now the meeting host. The psychiatrist will Right Click on their view of the camera and select **Request Camera Control**. This will create a popup window on the Med Clinics / support staff end asking to allow them to have control of the camera. Click **Approve**.



Camera controls should now display on the psychiatrist's computer.

7. Verify that both the psychiatrist and client's monitors are on and displaying correctly. You may also need to verify the cap is removed from the camera, if it is not, carefully remove the cap from the camera.

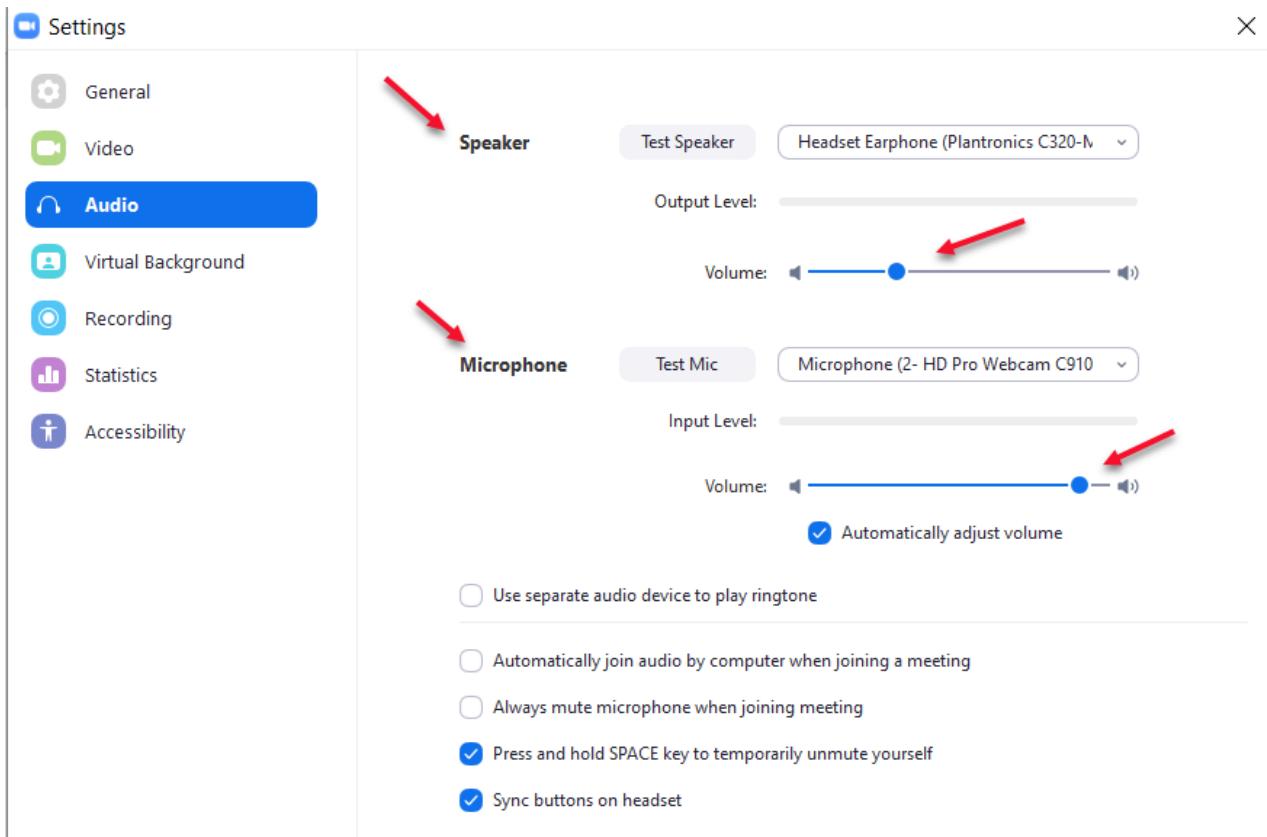
### *Optimizing Audio - Video*

Before leaving the room for the Telepsychiatry session to begin, make sure that the audio and video are set up optimally.

**Volume** can be controlled by clicking on the audio icon (which looks like a microphone), and clicking on Audio Settings. In the image below, the psychiatrist is in the larger image and the client at the Med Clinic location displays in the smaller image at the top.



Adjust the speaker and microphone volume as needed:



## *Psychiatrist Audio-Visual Controls*

In case the Psychiatrist has questions, these are some of the settings they can control:

- 1. Finding Camera Controls:** The camera controls will fade out when not in use on the psychiatrist's screen. If they no longer appear in the lower right-hand corner of the psychiatrist's screen, the psychiatrist can use their mouse or touch pad to move the cursor into the client's video area and the camera controls will reappear.
- 2. Operating the Camera Controls:** For the psychiatrist to zoom the camera in have them click on the plus sign (+), and to pull the camera back click on the minus sign (-). The camera can also be adjusted to the left (<), right (>), up (^), or down (v) using the controls in the screen shot below:

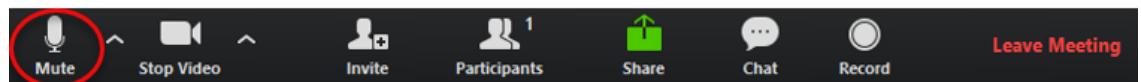


3. **Mute Audio or Stop Video:** During the Telepsychiatry session, the psychiatrist can mute the microphone or stop the video at any time:
- Mute the Audio:** The Psychiatrist can temporarily mute the audio so the client cannot hear them. To mute the audio, click on the Microphone icon on the left-hand side at the bottom of the screen:

1. Muted: Client cannot hear the psychiatrist:



2. Not muted: Client CAN hear the psychiatrist



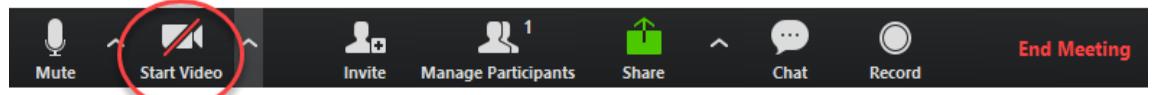
*Note: if the Psychiatrist mutes the audio during the session, they will need to make sure to un-mute the audio when the session is resumed.*

b. Stop the Video Camera:

1. **Video is On:** Client can see the psychiatrist:



2. **Video is Off:** Client CANNOT see the psychiatrist



## Multiple Telepsychiatry Sessions

*When there are multiple Telepsychiatry sessions scheduled over the course of the day, one Zoom Meeting Room can be utilized for the entire day.*

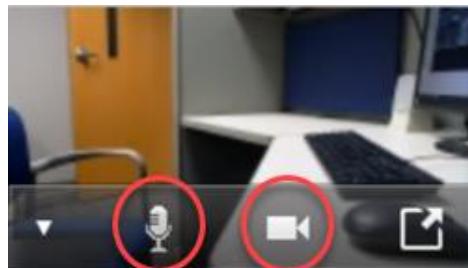
As the same Zoom Meeting Room can be utilized all day regardless of the number of Telepsychiatry sessions, only one Zoom Meeting Room needs to be created for that day. Multiple clients can be scheduled for individual Telepsychiatry sessions throughout the day by utilizing the Zoom Meeting Room scheduled by Med Clinic / support staff.

If there is a significant period of time between Telepsychiatry appointments, you can **Minimize and Mute** the Zoom Meeting Room, or you can **Leave the Zoom Meeting Room**.

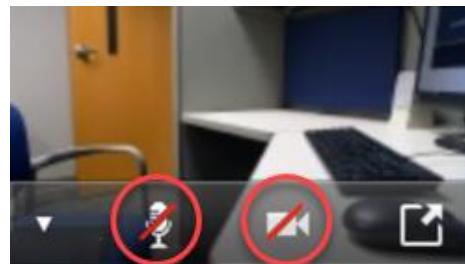
**Minimize and Mute:** This option allows you to keep the Zoom Meeting Room open so you don't have to reinitialize the established Zoom Meeting Room or set up multiple Zoom Meeting Rooms over the course of the day. By muting the audio and stopping the video camera on both the client and the psychiatrist, neither party will be seen or heard by the other.

1. To minimize and mute at the end of a Telepsychiatry session, both you (on the client station) and the psychiatrist can mute the audio, stop the video camera, and hide video without closing the meeting. Do this by following these steps:
  - 1) Minimizing the Zoom Meeting Room screen and then clicking on the down arrow, microphone and camera icons. It is important to note that, at the end of the session, if the microphone and camera are not muted and/or stopped, either party still active in the Zoom Meeting Room will be able to hear and/or see whatever the microphone and camera pick up. The following sequence of screen shots shows the microphone and camera as active, as inactive, and as inactive with the video minimized:

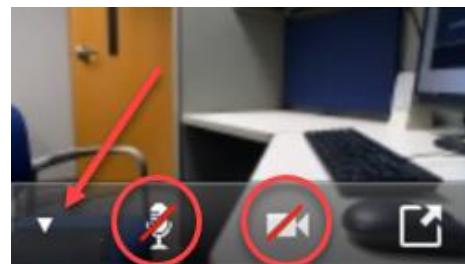
The Zoom Meeting Room screen is minimized, audio is not muted, and video camera is active:



The Zoom Meeting Room screen is minimized, audio is muted, and video camera is off:



To hide the Zoom Meeting Room, click on the down arrow:



The Zoom Meeting Room screen is hidden, audio is muted, and video camera is off:

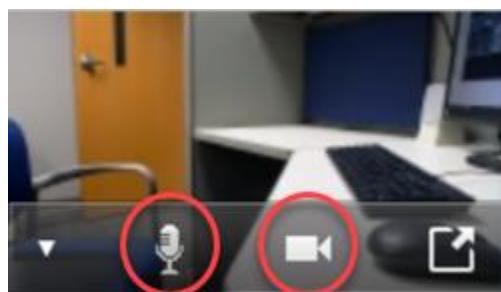


2. To reactivate the audio and video camera for the next Telepsychiatry session, maximize the screen, unmute the audio and turn on the video camera:

Expand the screen:



Unmute the audio and reactivate the camera:



**Leave the Zoom Meeting Room:** You can opt to leave the Zoom Meeting Room after each Telepsychiatry session. Using this option will require you to start a whole new Zoom Meeting Room for each Telepsychiatry session. In addition, Med Clinics / support staff may need to make the psychiatrist the Host again, and the psychiatrist may need to Request Camera Control again, as outlined in step 5 on page 14 above.

- To end the Zoom Meeting Room, follow the steps in the next section: **Leaving the Zoom Meeting Room**.
- To start a new Zoom Meeting Room for the next Telepsychiatry session, follow the steps in the preceding sections: **Scheduling a Zoom Meeting Room** and **Starting Telepsychiatry Session/s in the Zoom Meeting Room**.

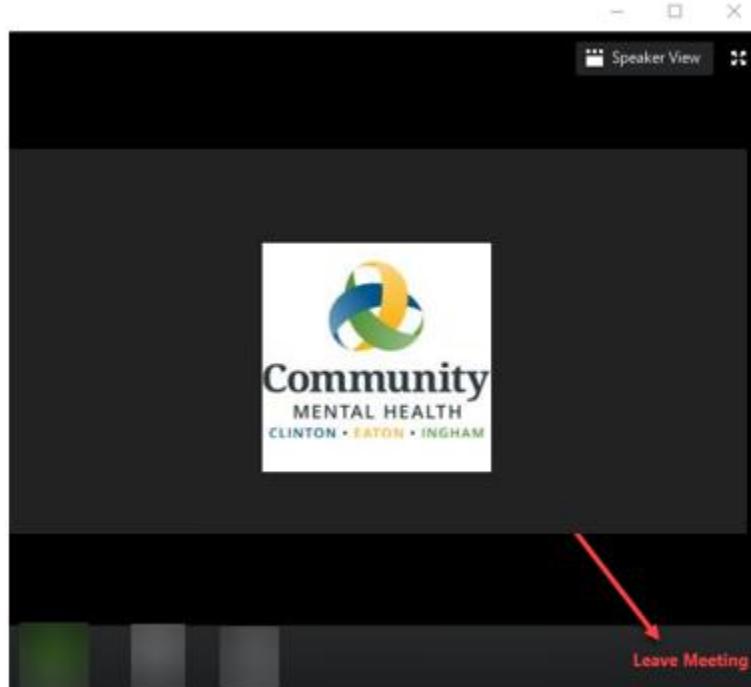
## **Leaving the Zoom Meeting Room**

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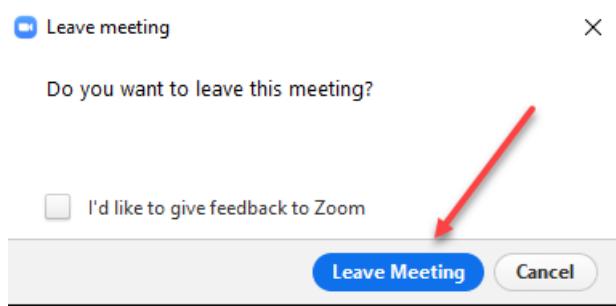
The psychiatrist (as Host) can end the Zoom Meeting Room at the end of their Telepsychiatry session, or at the end of their last Telepsychiatry session for the day. Reminder, if you end the Zoom Meeting Room between Telepsychiatry sessions, you will need to schedule and restart the Zoom meeting every time you start a new Telepsychiatry session. See previous section for **Multiple Telepsychiatry Sessions** on page 18.

Med Clinic / support staff can choose to **Leave Meeting** at the end of a Telepsychiatry session, or at the end of their last Telepsychiatry session for the day.

To leave the Zoom Meeting Room, click on the **Leave Meeting** label:



Click on the Leave meeting button:



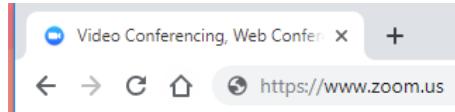
# Psychiatrists

## One-time Setup on Zoom.com

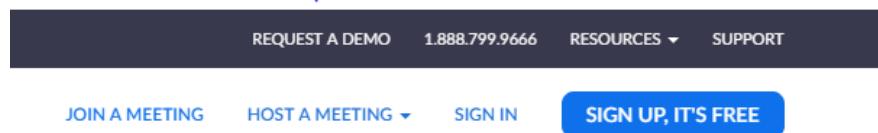
---

Setup Steps 1 through Step 4 must be completed the first time you access Zoom to set up your profile.

1. **Open Zoom:** Open Chrome and go to the URL [www.zoom.us](https://www.zoom.us).



2. **Sign up for Zoom:** Click on the SIGN UP, IT'S FREE button



Create a Basic profile at Zoom using your work email address. You will receive a confirmation link from Zoom to continue with the registration process. Create a password to complete your profile.

4. **Set up your profile:**

- a) After the screen updates, click on the Go to My Account button

Start your test meeting.

Excellent! Now it's time to start meeting.

Your personal meeting url:

<https://zoom.us/j/8103111823>



- b) Customize your settings so that meeting rooms that you set up will have the correct configuration. It is important to complete this step before scheduling meeting rooms to ensure that the controls will work properly. Go to the Schedule Meeting section and turn on:
- Host video
  - Participants video
  - set Audio Type to Computer Audio
  - Turn on Join before host, and
  - click on **Save**.

The screenshot shows the 'Schedule Meeting' section of the Zoom web interface. At the top, there are tabs for 'Meeting', 'Recording', and 'Telephone'. The 'Meeting' tab is selected.

- Host video:** A toggle switch is turned on (blue). A red box labeled 'a' highlights this switch.
- Participants video:** A toggle switch is turned on (blue). A red box labeled 'b' highlights this switch.
- Audio Type:** A dropdown menu shows 'Computer Audio' selected. A red box labeled 'c' highlights the 'Computer Audio' option. Below the dropdown are 'Save' and 'Cancel' buttons.
- Join before host:** A toggle switch is turned on (blue). A red box labeled 'd' highlights this switch. To the right is a 'Help' button with a blue background and white text.

- f) Then scroll down to In Meetings (Advanced), to turn on Far End Camera Control.

The screenshot shows the 'In Meetings (Advanced)' section. There is a single setting:

- Far end camera control:** A toggle switch is turned on (blue). A red box labeled 'f' highlights this switch.

A descriptive text below the setting reads: "Allow another user to take control of your camera during a meeting".

## Setting up Scheduling Privilege so others can create Zoom meeting rooms for you

---

### Overview:

Scheduling Privilege is designed for you to:

1. Assign or delegate a user or multiple users in your account to schedule meetings on your behalf
2. You can also schedule meetings on behalf of a user (or multiple users) that has assigned you scheduling privilege
3. You and the assigned scheduler must have a Zoom license and have been added to our CMHA-CEI Zoom account
4. Users with Scheduling Privilege on our account will be able to manage and act as an alternative host for all meetings.

### Setting up scheduling privilege

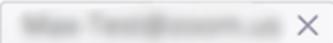
1. Sign in to the Zoom web portal.
2. Click **Settings**.
3. Under **Other**, click the plus sign (+) next to **Assign scheduling privilege to**.

#### Schedule Privilege

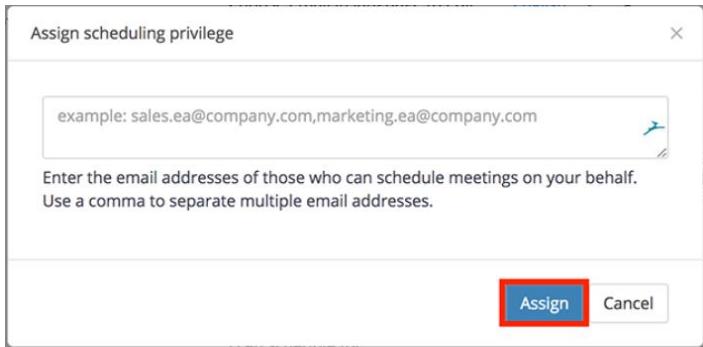
You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.

Assign scheduling privilege to   
No one

I can schedule for

 X

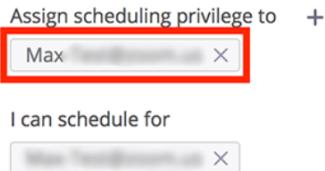
4. Enter one or more email addresses in the window, separated with a comma.
5. Click **Assign**.



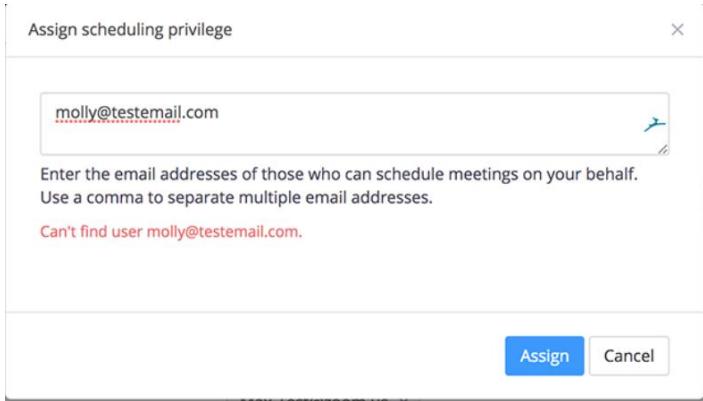
If the user was assigned successfully, they will appear under **Assign Scheduling Privilege to**. However, they will need to sign out of the Zoom desktop client and sign in again before they will be able to schedule for you there.

#### Schedule Privilege

You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.



If scheduling privilege cannot be assigned because the user is not on our CMHA-CEI account or is not a Licensed user, you will receive an error message.



The user given scheduling privilege will need to logout of the Zoom client and login again for the scheduling privilege option to appear.

## Set up Waiting Room

Starting September 27, 2020, Zoom will require that all meetings have a Passcode or a Waiting Room enabled for all licensed accounts. If neither is enabled, Zoom will enable a Waiting Room for your meetings. Meeting passcodes are already enforced for all basic accounts.

If you already have a Passcode or Waiting Room enabled your settings will remain the same for your current selection and there will be no change to how you schedule meetings. You can change your security preference at any time.

### The Waiting Room

The Waiting Room feature allows the host to control when participants join the meeting. When participants join a meeting, they are placed in a waiting room and the host is required to admit them. As the meeting host, you can admit attendees one by one, or hold all attendees in the Waiting Room and admit them all at once. Enabling Waiting Room for new or existing meetings does not affect calendar invitations.

#### To enable Waiting Room:

4. Sign in to your Zoom profile at the Zoom.com web portal and click on **Settings**.
5. Under the **Security** section, activate the **Waiting Room** function:

The screenshot shows the Zoom.com web portal interface. The URL in the address bar is https://zoom.us/profile/setting. The main navigation menu includes links for SOLUTIONS, PLANS & PRICING, CONTACT SALES, and SCHEDULE A MEETING. On the left, a sidebar menu lists Profile, Meetings, Webinars, Recordings, **Settings** (which is highlighted with a blue background), Account Profile, and Reports. The main content area is titled 'Meeting' and contains tabs for Recording and Telephone. Below these tabs is a 'Security' section. Under 'Security', there is a 'Waiting Room' subsection with the following text: 'When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.' To the right of this text is a blue toggle switch that is turned on (set to 'on'). A red arrow points to this toggle switch, indicating it needs to be activated. At the bottom of the 'Waiting Room' section, there are two buttons: 'Edit Options' and 'Customize Waiting Room'.

Click on **Edit Options** to select who you want to admit to the waiting room:

## Waiting Room Options

These options will apply to all meetings that have a Waiting Room, including standard meetings, PMI meetings, webinars.

Who should go in the waiting room?

- Everyone
- Users not in your account
- Users who are not in your account and not part of the allowed domains

[Continue](#) [Cancel](#)

Participants will see a pop up dialog that says "Please wait, the meeting host will let you in soon."

Please wait, the meeting host will let you in soon.

Molly Parker's Personal Meeting Room

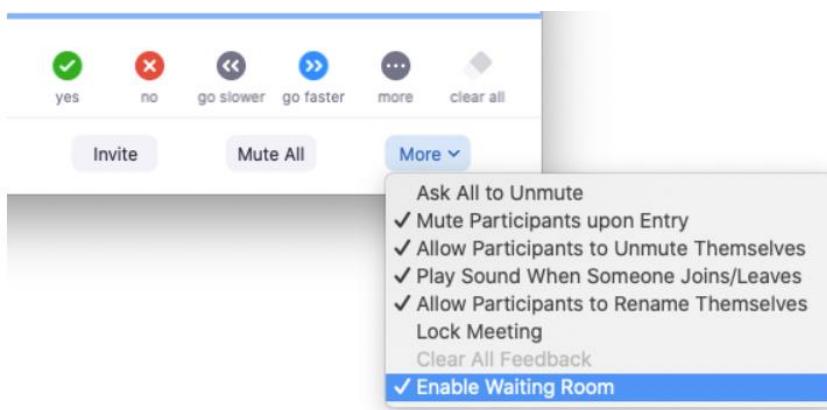
[Test speaker and microphone](#)

## Enabling or disabling Waiting Room during a meeting

1. As the meeting host, click **Participants**.



2. Click **More** and choose **Enable Waiting Room** to enable or disable the feature.



## Admitting participants during a meeting

1. As the meeting host, click **Manage Participants**.



2. Click Admit to have the participant join the meeting.

The screenshot shows the 'Participants' section with the following details:

- 1 Waiting
- G1 Guest 1 (Guest)
- Message
- Remove
- Admit (button highlighted with a red box)

## Admit all participants from the Waiting Room

1. As the meeting host, click **Participants**.



2. Click Admit all.

The screenshot shows the 'Participants' section with the following details:

- 2 Waiting
- G1 Guest 1 (Guest)
- G2 Guest 2 (Guest)
- Message
- Admit all (button highlighted with a red box)
- Remove
- Admit

## Sending participants to the Waiting Room during a meeting

1. As the meeting host, click Participants.



2. Click **More** next to the participant's name and choose **Put in Waiting Room**

The screenshot shows the 'Participants' section with the following details:

- Participants (3)
- Francis (Host, me)
- G1 Guest 1 (Guest)
- G2 Guest 2 (Guest)

A context menu is open over the second participant ('Guest 1'), showing the following options:

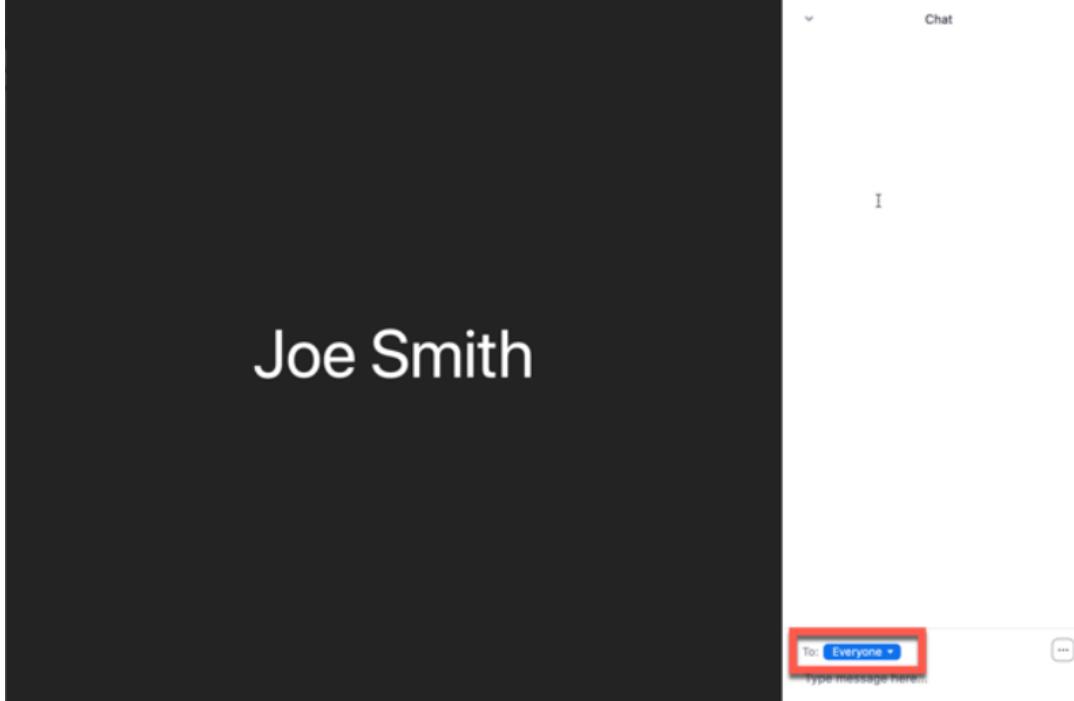
- More ▾
- Chat
- Ask to Start Video
- Make Host
- Make Co-Host
- Rename
- Put in Waiting Room (button highlighted with a blue box)
- Remove
- Report

## Sending messages to participants in the Waiting Room

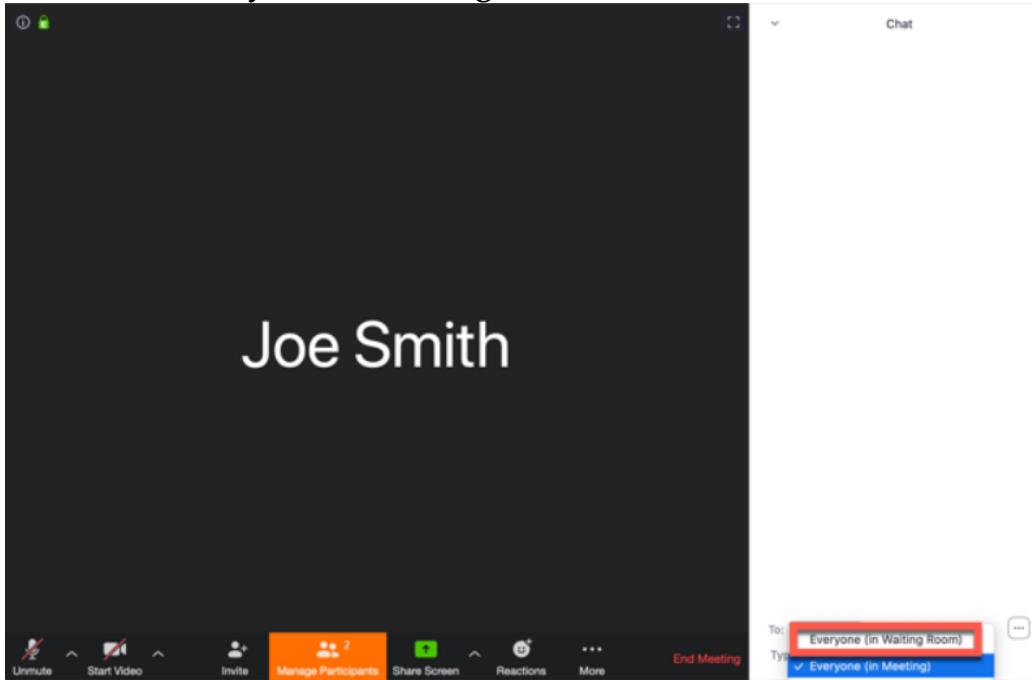
1. As the meeting host, click **Chat**.



2. Click the dropdown next to **To:**:

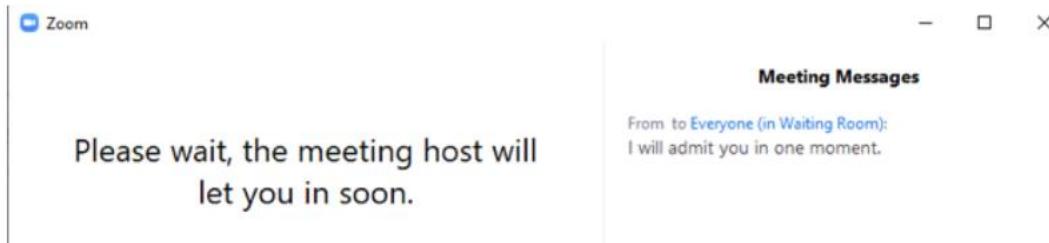


3. Click **Everyone (in Waiting Room)**:



4. Type and send your chat message to the Waiting Room.

Once the message has been sent, the participants in the Waiting Room will see the message on the Waiting Room screen:



## Set up a Passcode

---

### Passcodes

Meetings can require passcodes for an added layer of security. If Passcodes are added to new meetings, the Passcode will automatically be embedded into the meeting link.

**IMPORTANT:** If you add a Passcode to an existing meeting, calendar invites will need to be resent to include the Passcode.

### To enable Passcode settings:

1. Sign into the Zoom web portal and navigate to **Settings**.
2. In the **Security** section, verify that the passcode settings that you would like to use for your meetings and webinars are enabled.  
If the setting is disabled, click the toggle to enable it. If a verification dialog displays, choose **Turn On** to verify the change.

## Editing a passcode for a meeting

By default, meetings are assigned a random passcode. You can update the passcode to one of your choosing:

1. Sign in to the Zoom web portal.
2. In the navigation menu, click **Meetings**.
3. Click the topic of the meeting you would like to update the passcode for.

The screenshot shows the Zoom web portal interface. At the top, there are tabs for 'Upcoming', 'Previous', 'Personal Room', and 'Meeting Templates'. Below these are buttons for 'Select time range...', 'All Host', and '+ Schedule Meeting'. A date range 'Today' is selected. A list of meetings is shown, with the first meeting being '10:00am - 11:00am' titled 'Kyle Anderson's Zoom Meeting' with a meeting ID of '981-2345-6789' and host 'Kyle Anderson'.

4. Click **Edit This Meeting**.
5. In the **Security** section, edit the passcode. You can also enable Waiting Room.
6. Click **Save**

## Editing the passcode for your Personal Meeting ID

1. Sign in to the Zoom web portal and navigate to Meetings.
2. Click **Personal Meeting Room**.

The screenshot shows the Zoom web portal interface with the 'Personal Room' tab selected. Below it are tabs for 'Details', 'Poll', and 'Live Streaming'. The meeting details are displayed: Topic 'Kyle Anderson's Zoom Meeting', Meeting ID '981-2345-6789', and Join URL 'https://success.zoom.us/j/98123456789'. The 'Details' tab is currently active.

3. Click **Edit this Meeting**.

Topic Molly Parker's Personal Meeting Room

Time Add to [Google Calendar](#) [Outlook Calendar \(.ics\)](#) [Yahoo Calendar](#)

Meeting ID

Meeting Password  Require meeting password [Remove](#)

Join URL: [Copy the invitation](#)

Video	Host	Off
	Participant	Off
Audio	Telephone and Computer Audio	
	Dial from	
Meeting Options	<input checked="" type="checkbox"/> Enable join before host <input checked="" type="checkbox"/> Mute participants upon entry <small>?</small> <input checked="" type="checkbox"/> Enable waiting room <input checked="" type="checkbox"/> Record the meeting automatically on the local computer	

[Edit this Meeting](#) [Join Now](#)

4. In the **Security** section, edit the passcode. You can also enable Waiting Room.
5. Click **Save**.

## Starting Telepsychiatry Session/s in the Zoom Meeting Room

1. Open the email received from the Med Clinic / support staff.
  - a. Join the Telepsychiatry session by clicking on the Join Zoom Meeting link:

Hi, Doctor –

Please use this link to access your Telemedicine sessions today.

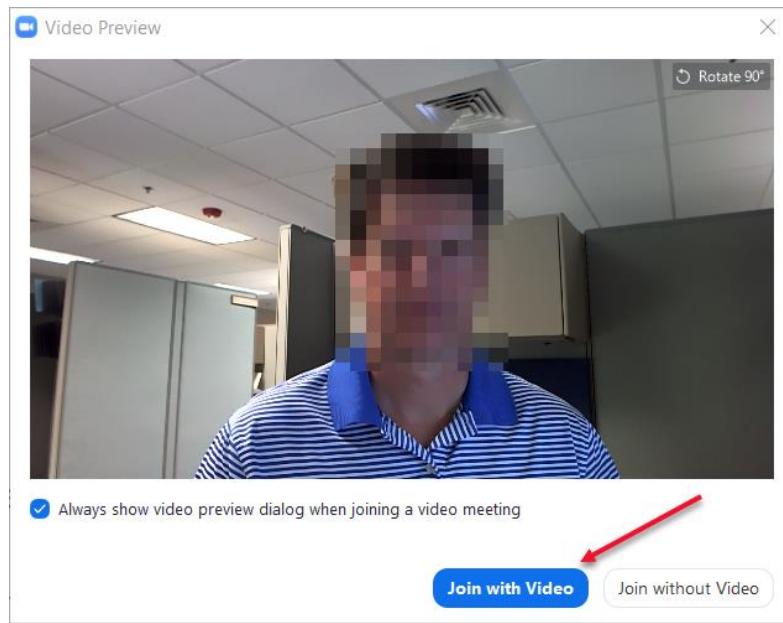
Med Clinic staff are inviting you to a scheduled Zoom meeting.

Topic: Med Clinic Telemedicine  
Time: Sep 17, 2019 04:00 PM Eastern Time (US and Canada)

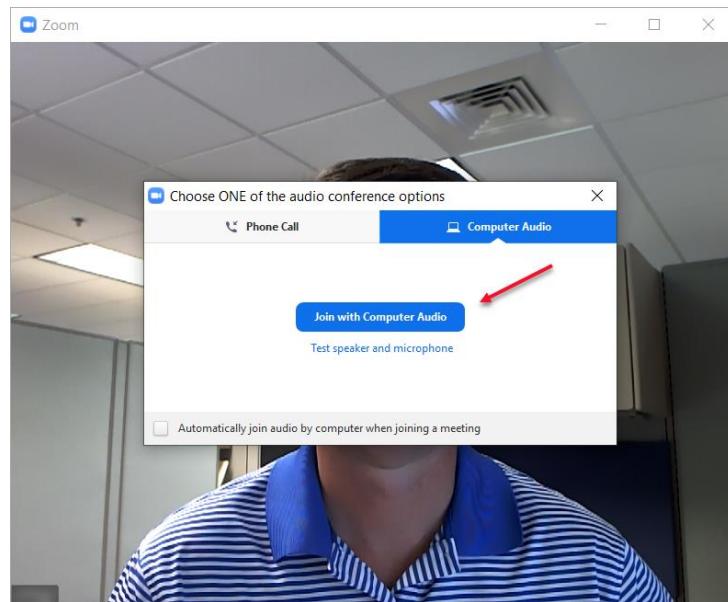
Join Zoom Meeting  
<https://zoom.us/j/860028676>

Regards,

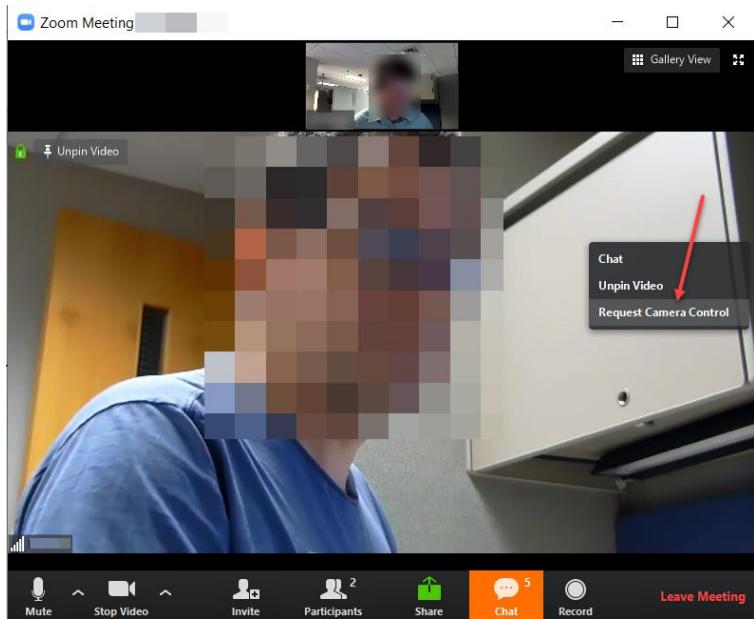
2. A video Preview screen will display. Click on the Join with Video button.



3. When you are prompted to join with audio, click on the **Join with Computer Audio** button.

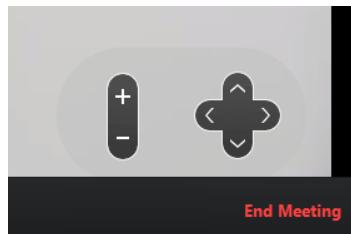


4. After you join the Telepsychiatry session, the Med Clinic / support staff will make you the Host of the meeting. Once you are the Host, right click on your view of what displays at the Med Clinic / support location and select **Request Camera Control**:



5. This will create a popup window at the Med Clinic / support location asking that you be allowed to have control of the camera. After the staff at the Med Clinic location clicks on the Approve button, Camera controls will display on your computer.

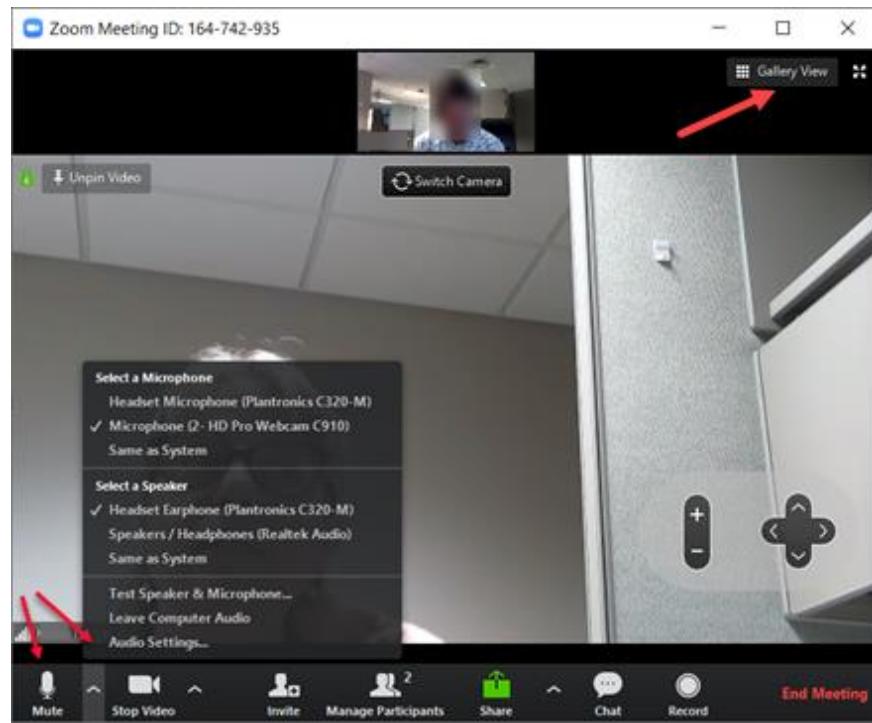
**Operating the Camera Controls:** Use the direction controls to move the camera up, down, left or right, as well as to zoom in or out as desired. Click on the plus sign (+), and to pull the camera back click on the minus sign (-). The camera can also be adjusted to the left (<), right (>), up (^), or down (v) using the controls in the screen shot below:



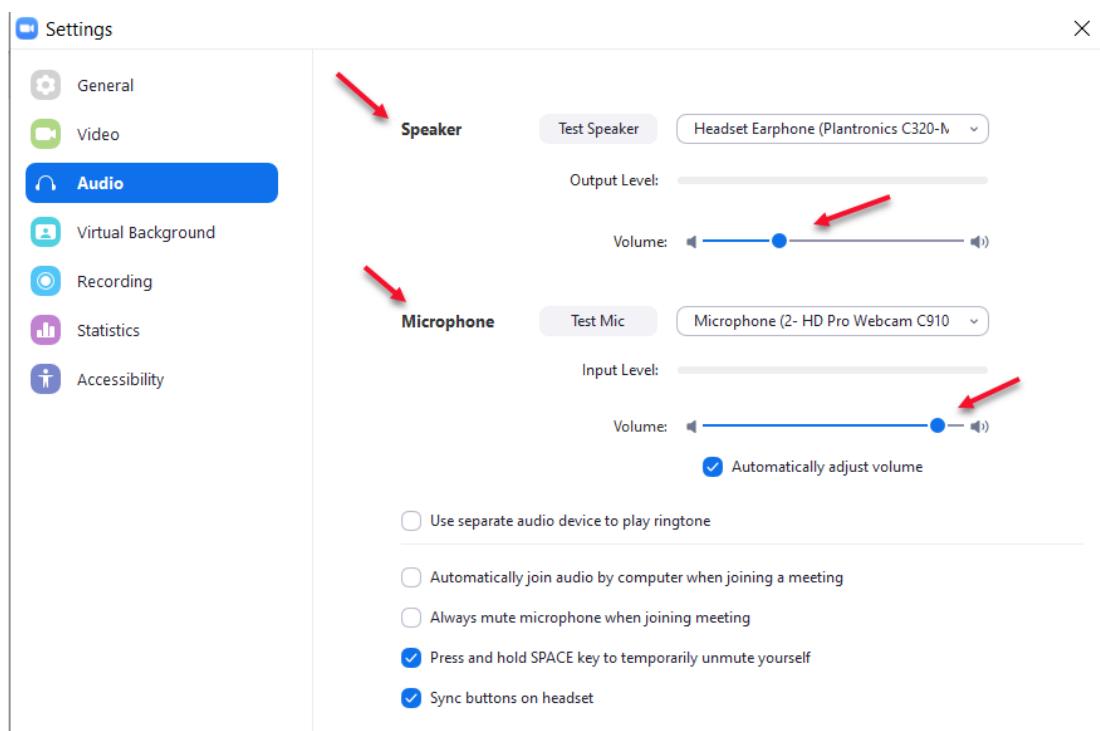
When not in use, the camera controls will fade out. If they no longer appear in the lower right-hand corner of your screen, use the mouse to move the cursor into the client's video area and they will reappear.

### *Optimizing Audio - Video*

Before the Telepsychiatry session begins, make sure that the audio and video are set up optimally. Volume can be controlled by clicking on the audio icon, and clicking on Audio Settings. In the screen shot below, the microphone icon and Audio Settings option are displayed in the lower left-hand corner.



Adjust the speaker and microphone volume as needed:



If you need to mute the audio or stop the video camera at any time, click on the microphone (Mute) and/or video icon (Stop Video) at the left-hand side on the bottom of the screen.

Verify that both cameras are on and displaying correctly. Your image will display at the top and the Med Clinic / support location displays in the larger section below. Click on the Gallery View option in the upper-right corner of your video display to alter the window display.

**Mute Audio or Stop Video:** During the Telepsychiatry session you can mute the microphone or stop the video at any time:

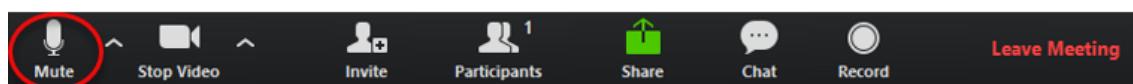
- a. **Mute the Audio:** You can temporarily mute the audio so the client cannot hear you. To mute the audio, click on the Microphone icon on the left-hand side at the bottom of the screen:

1.Muted: Client cannot hear you:



2.

3.Not muted: Client CAN hear you:



*Note: if you mute the audio during the session, you will need to make sure to un-mute the audio when the session is resumed.*

- b. **Stop the Video Camera:**

1. **Video is On:** Client can see the psychiatrist:



2. **Video is Off:** Client CANNOT see the psychiatrist



## Multiple Telepsychiatry Sessions

*When there are multiple Telepsychiatry sessions scheduled over the course of the day, one Zoom Meeting Room can be utilized for the entire day.*

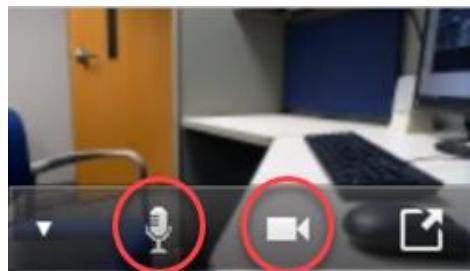
As the same Zoom Meeting Room can be utilized all day regardless of the number of Telepsychiatry sessions, only one Zoom Meeting Room needs to be created for that day. Multiple clients can be scheduled for individual Telepsychiatry sessions throughout the day by utilizing the Zoom Meeting Room scheduled by Med Clinic / support staff.

If there is a significant period of time between Telepsychiatry appointments, you can **Minimize and Mute** the Zoom Meeting Room, or you can **End the Zoom Meeting Room**.

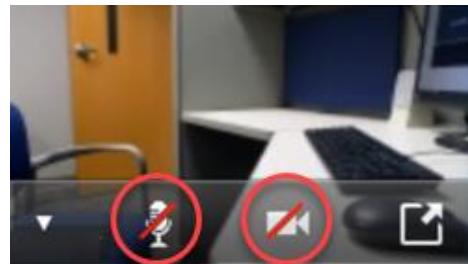
**Minimize and Mute:** This option allows you to keep the Zoom Meeting Room open so Med Clinic / support staff don't have to reinitialize the established Zoom Meeting Room or set up multiple Zoom Meeting Rooms over the course of the day. By muting the audio and stopping the video camera on both the client's and your workstations, neither party will be seen or heard by the other.

1. To minimize and mute at the end of a Telepsychiatry session, both you and the Med Clinic / support staff can mute the audio, stop the video camera, and hide video without closing the meeting. Do this by following these steps:
  - 1) Minimize the Zoom Meeting Room screen and then click on the down arrow, microphone icon, and video camera icon. The following sequence of screen shots shows the microphone and camera as active, as inactive, and as inactive with the video minimized:

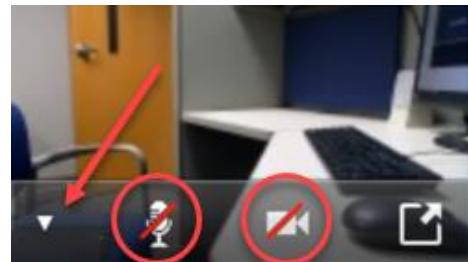
The Zoom Meeting Room screen is minimized, audio is not muted, and video camera is active:



The Zoom Meeting Room screen is minimized, audio is muted, and video camera is off:



To hide the Zoom Meeting Room, click on the down arrow:



The Zoom Meeting Room screen is hidden, audio is muted, and video camera is off:

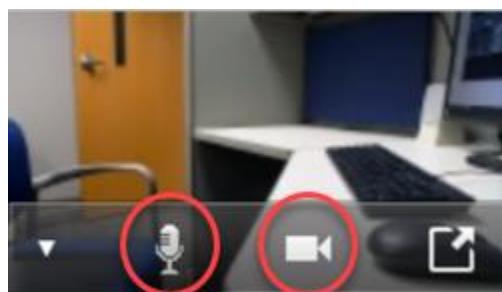


2. To reactivate the audio and video camera for the next Telepsychiatry session, maximize the screen, unmute the audio and turn on the video camera:

Expand the screen:



Unmute the audio and reactivate the camera:



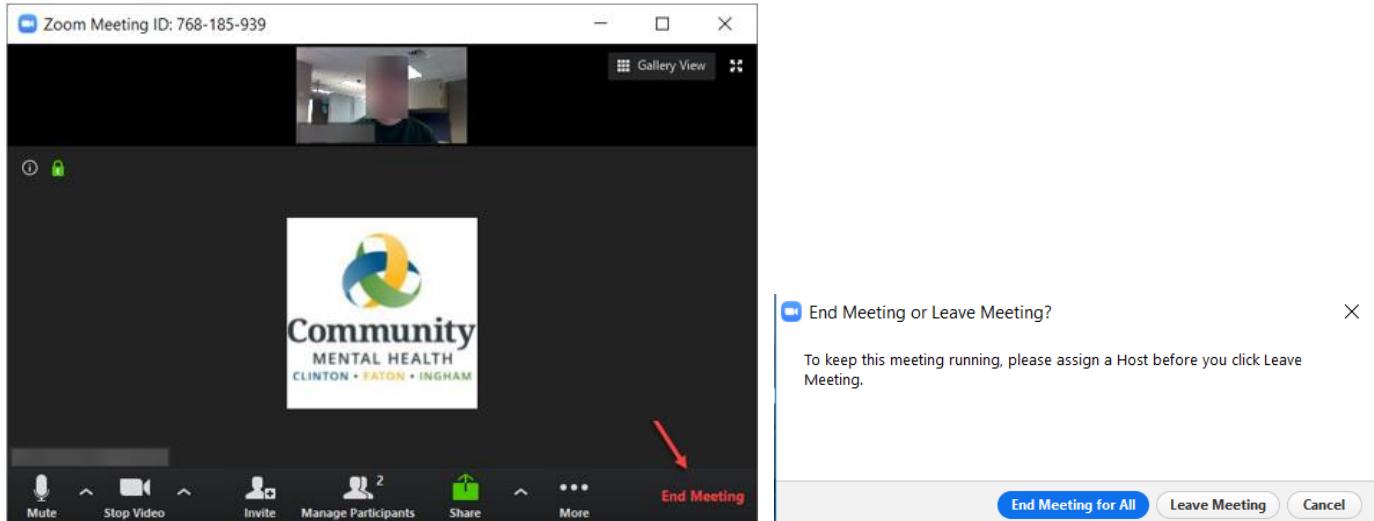
If the Zoom Meeting Room is set for the day and there is a two hour 10:00 a.m. session and a two hour 2:00 p.m. session, you could also close Zoom and then re-access the Zoom Meeting Room later by clicking on the link in the e-mail invitation received earlier.

It is important to note that, at the end of the Telepsychiatry session, if the microphone and camera are not muted or stopped, either party still active in the session will be able to hear and/or see whatever the microphone and camera pick up at the other location. In addition, when you start the 2:00 p.m. session you will have to unmute the microphone and restart the video camera. If you had ended the Zoom Meeting Room altogether, the Med Clinic / support staff may need to make you the Host again, and you may need to Request Camera Control again, as outlined in step 4 on page 33 above.

## Ending the Zoom Meeting Room

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When the Telepsychiatry sessions are over, you can end the Zoom Meeting Room for all (**End Meeting**). Med Clinic / support staff can **Leave the Meeting** if you had not ended it when closing Zoom.



## Troubleshooting

### My video/camera isn't working:

[https://support.zoom.us/hc/en-us/articles/202952568-My-Video-Camera-Isn't-Working](https://support.zoom.us/hc/en-us/articles/202952568-My-Video-Camera-Isn-t-Working)

### There is echo in my meeting:

Echo can be caused by many things, such as a participant connected to the meeting audio on multiple devices or two participants joined in from the same local.

<https://support.zoom.us/hc/en-us/articles/202050538-Audio-Echo-In-A-Meeting>

### Additional Zoom Meeting Room Details:

If additional information is required about specific Zoom Meeting Room detail, click on the Information icon in the upper left-hand corner of the Zoom Meeting Room screen and additional details will display:

