

Toolkit: Scheduled Virtual Visits Utilizing HIPAA Compliant Zoom Platform

- April 2020



Table of Contents

Page 3	<u>Virtual Care Definitions and Terms</u>
Page 4	<u>Get On Boarded to Your Virtual Room</u>
Page 14	<u>Technical Setup</u>
Page 20	<u>Schedule Virtual Visit</u>
Page 23	<u>Patient instructions at time of visit</u>
Page 27	<u>Perform Virtual Visit</u>
Page 38	<u>Document and Billing</u>
Page 42	<u>Appendix A - Clinician Setup (iPhone & Android)</u>
Page 48	<u>Appendix B - Patient Setup (iPhone & Android)</u>
Page 53	<u>Appendix C – Options for Office Staff Process</u>
Page 63	<u>Appendix D- Software Support/Help</u>

Virtual Care Definitions and Terms

Where can Virtual Care service be rendered?

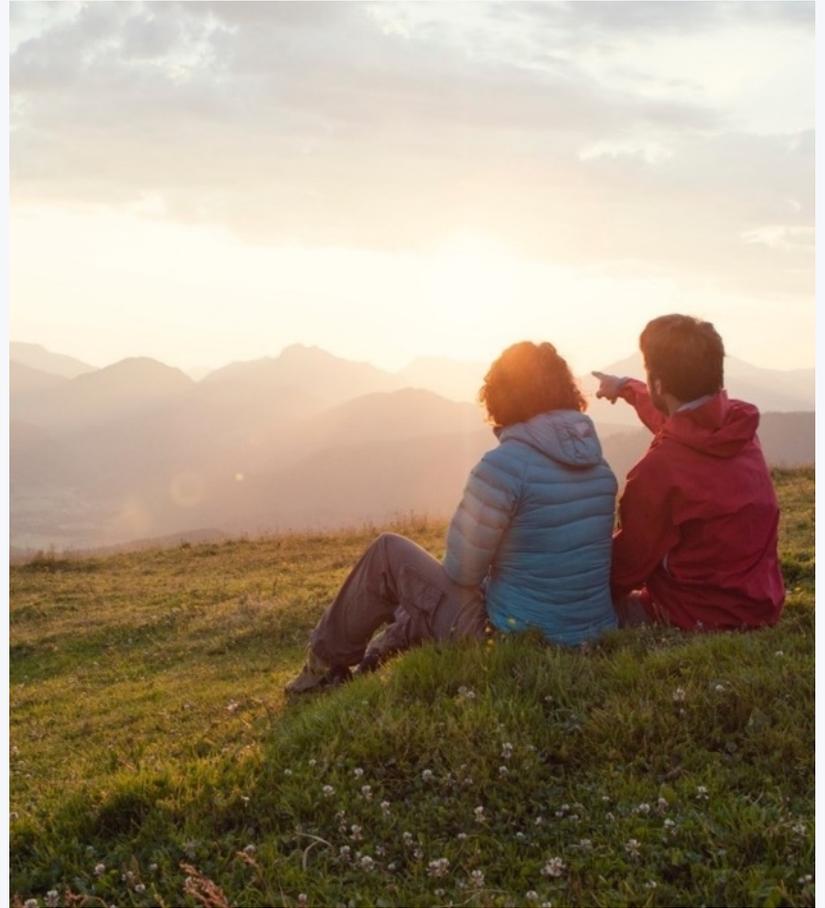
Distant site: where the Clinician delivering the service is located at the time the service

Originating site: location of the patient at the time the service (must be in the state where Clinician is licensed to practice)

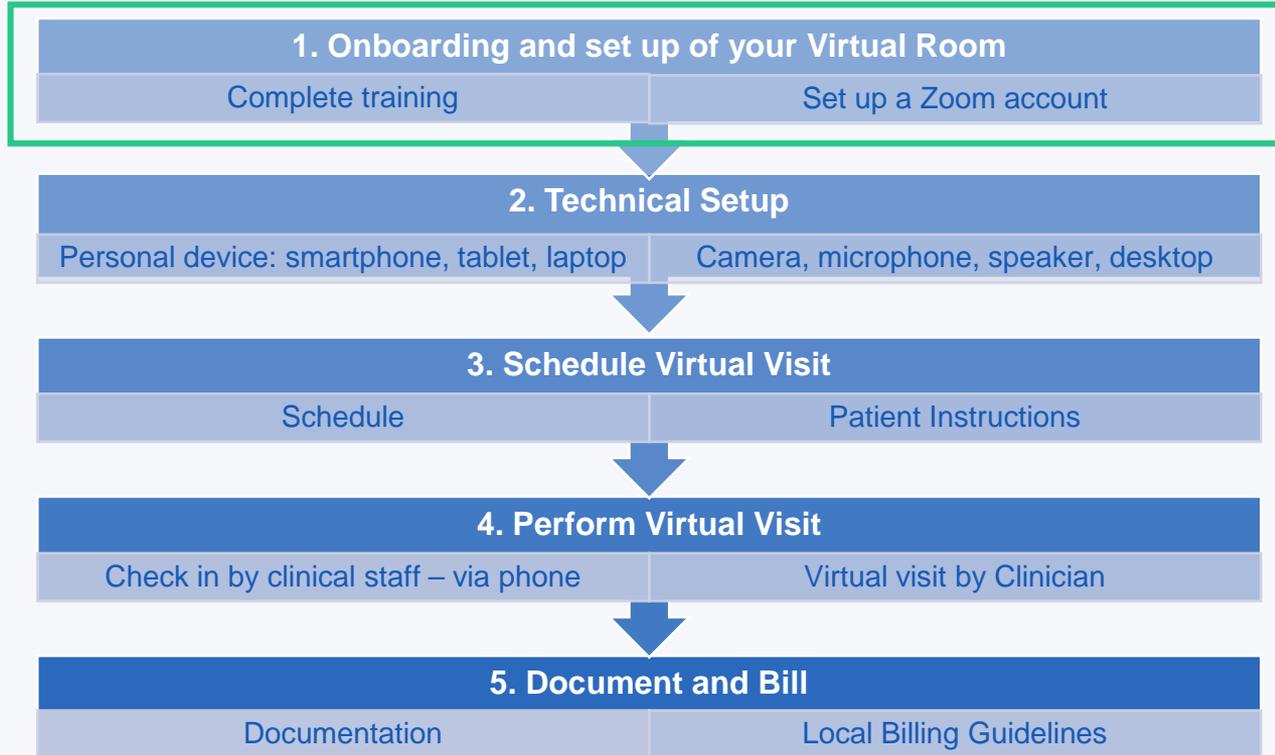
Virtual Care Services performed via an interactive audio & video communication technology. The following requirements must be met:

- *Interactive Audio & Video is required*

Its do not qualify for Video visit



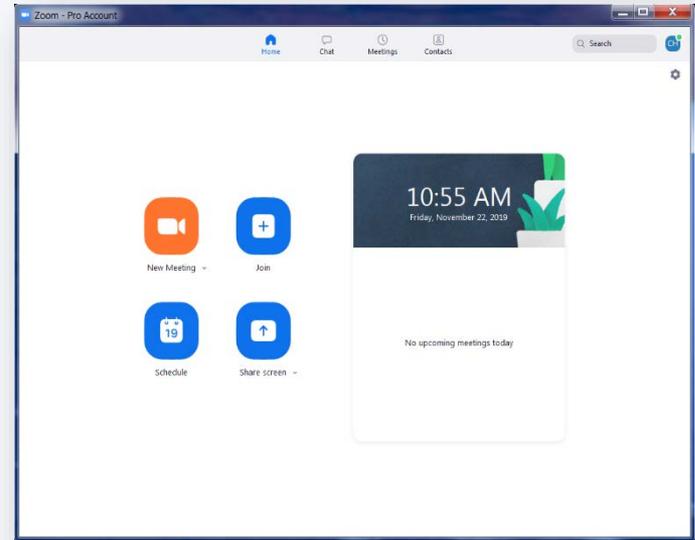
Simple 5 Step Process



What is Zoom?



- *HIPAA compliant Zoom platform will assist you in improving patient accessibility to healthcare and patient convenience via video visit*
- *Access can be through a smart device, laptop or desktop via internet connection*



Activate HIPAA Compliant Zoom Account

You will receive an email to activate your HIPAA compliant Zoom application:

- Activate account
- Sign up with a Password

Please use your work/corporate email address

Downloading Zoom

- Go to zoom.us/download to download Zoom onto your laptop/desktop

OR

- Go to the app store on your smartphone/tablet and download the **Zoom Cloud Meeting** app
- Follow the prompts to download Zoom on your device



Andriod



iPhone

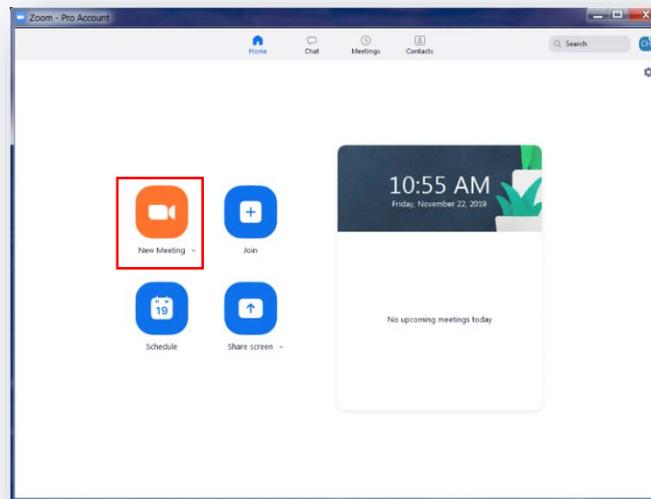
Launch Video Visit (Desktop/Laptop View)

When patient is ready for video visit, open up your Zoom Account



Log into your Zoom account

Select **NEW MEETING** to start virtual visit



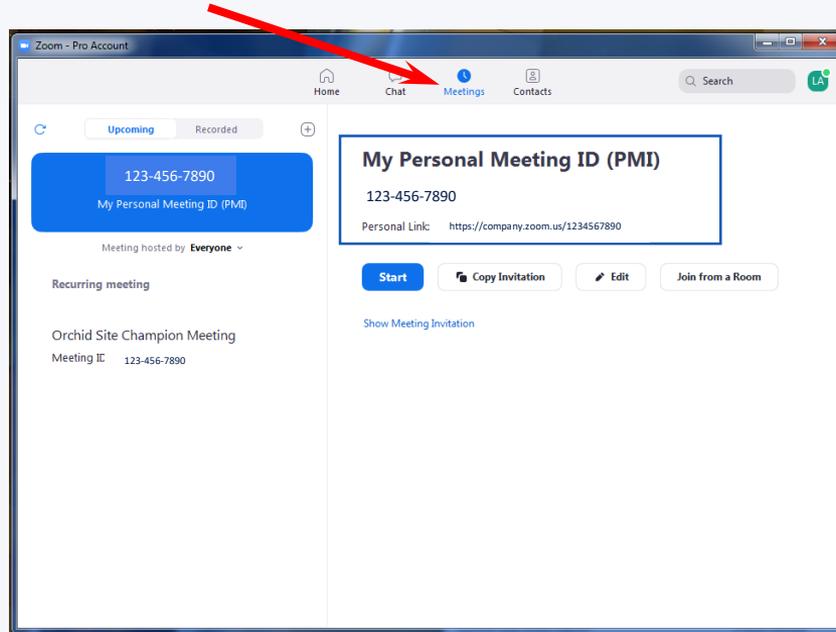
Setup Zoom Application on Smartphones

See Appendix A for detailed **Clinician** iPhone and Android instructions

See Appendix B for detailed **Patient** iPhone and Android instructions

Personal Meeting ID (PMI)

Your personal meeting ID can be found under the “Meetings” tab (on your desktop as well as your smart device)



Obtaining your Zoom Personal Meeting ID (Clinicians Only)

Obtaining your Zoom Personal Meeting ID (Clinicians Only)

***Your Personal Meeting ID will be sent to your patients for Video Visits**

1)Open up your Zoom Account

a)Select icon on desktop



b)If no icon, use the link: <https://zoom.us/>

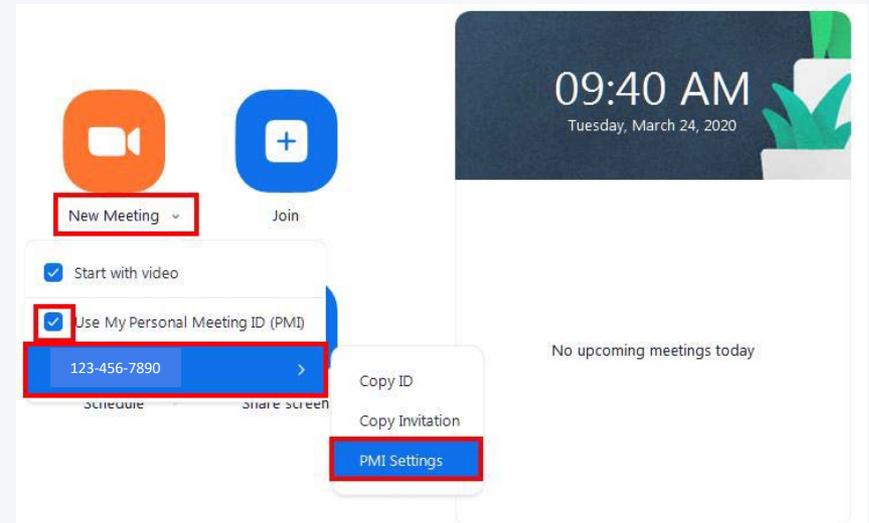
2)Log in to your account

3)Select the New Meeting Drop Down

4)Select **Use My Personal Meeting ID (PMI)** if not already selected

5)**Hover** over your *ID number*

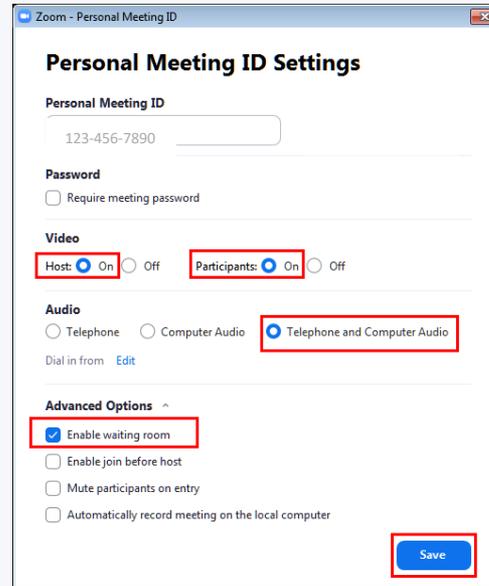
6)Select **PMI Setting**



Obtaining your Zoom Personal Meeting ID (Clinicians Only) Cont.

12

- 7) **Personal Meeting ID** box will populate
 - a) Under Video, Select – Host: **On**; Participants: **On**
 - b) Under Audio, Select **Telephone and Computer Audio**
 - c) Under Advanced Options, select **Enable Waiting Room**
 - d) Select **Save**



The screenshot shows the 'Zoom - Personal Meeting ID' settings window. The 'Personal Meeting ID' field contains '123-456-7890'. The 'Video' section has 'Host' and 'Participants' both set to 'On'. The 'Audio' section has 'Telephone and Computer Audio' selected. The 'Advanced Options' section has 'Enable waiting room' checked. A 'Save' button is located at the bottom right. Red boxes highlight the 'Host: On', 'Participants: On', 'Telephone and Computer Audio', 'Enable waiting room', and 'Save' button.

Zoom - Personal Meeting ID

Personal Meeting ID Settings

Personal Meeting ID
123-456-7890

Password
 Require meeting password

Video
Host: On Off Participants: On Off

Audio
 Telephone Computer Audio Telephone and Computer Audio
Dial in from [Edit](#)

Advanced Options ^
 Enable waiting room
 Enable join before host
 Mute participants on entry
 Automatically record meeting on the local computer

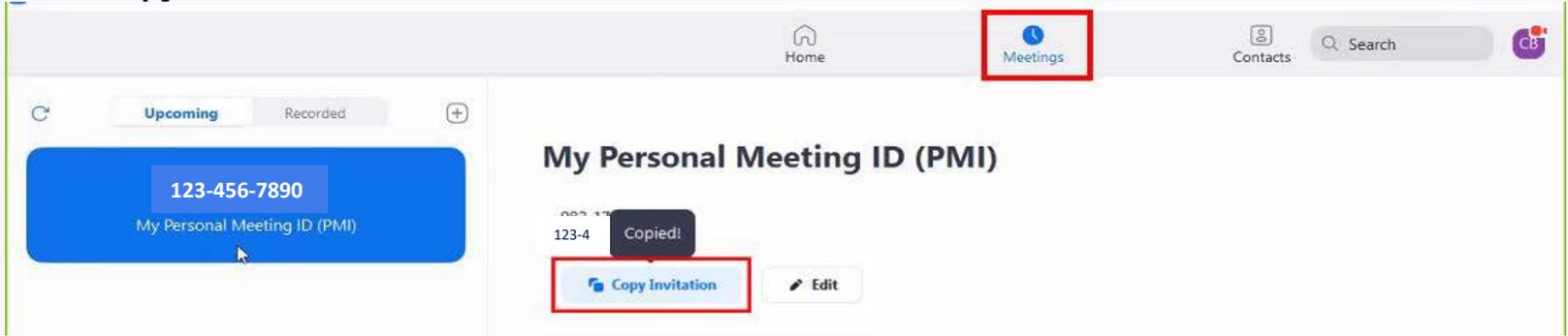
Save

Obtaining your Zoom Personal Meeting ID (Clinicians Only) - Cont.

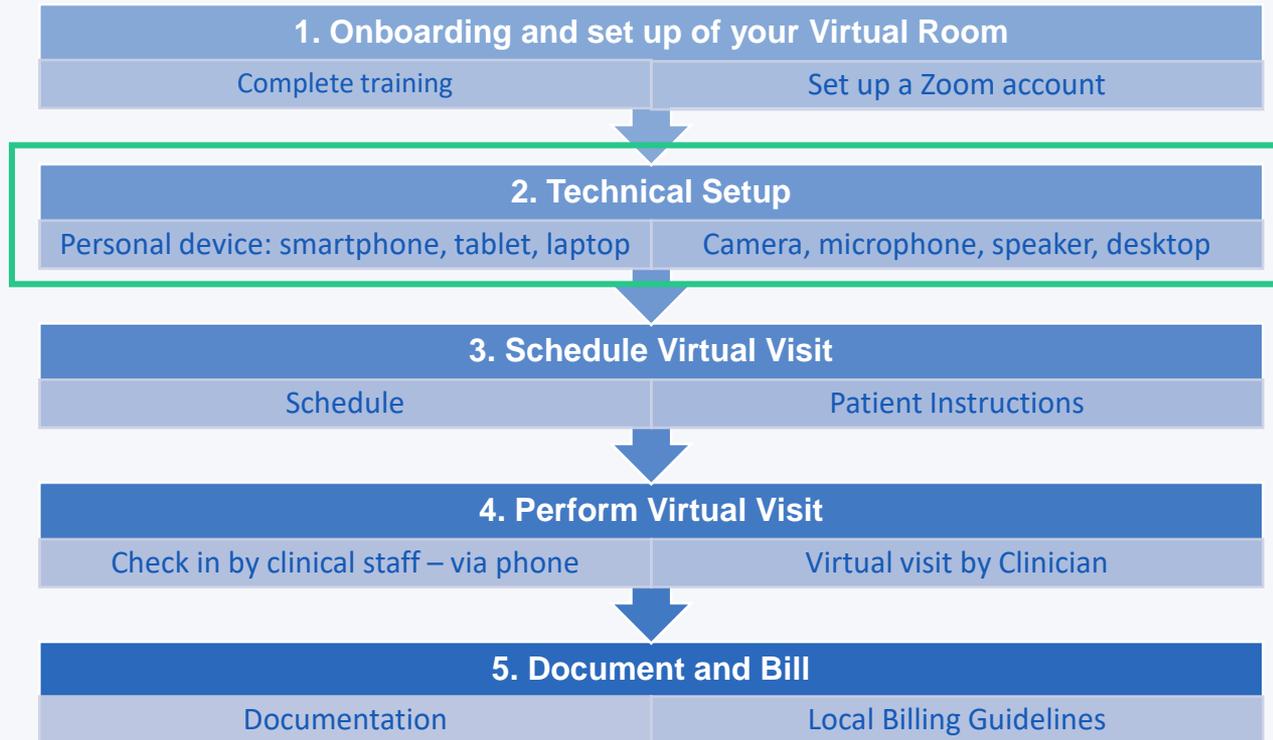
13

8) To Copy PMI Invitation; Select **Meetings**

9) Select **Copy Invitation**



10) **Send this information to your Clinic Manager** and they will distribute to the staff who are scheduling your appointments. They will need the PMI information



The Technical Setup

Any WIFI connected device with a camera/mic and a speaker is sufficient

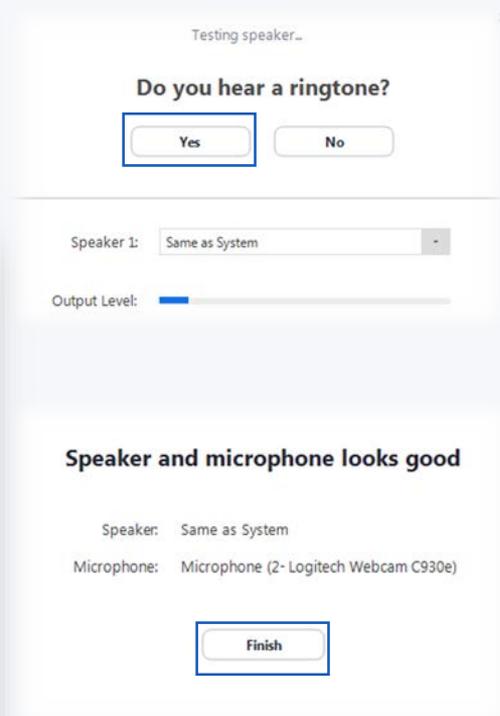
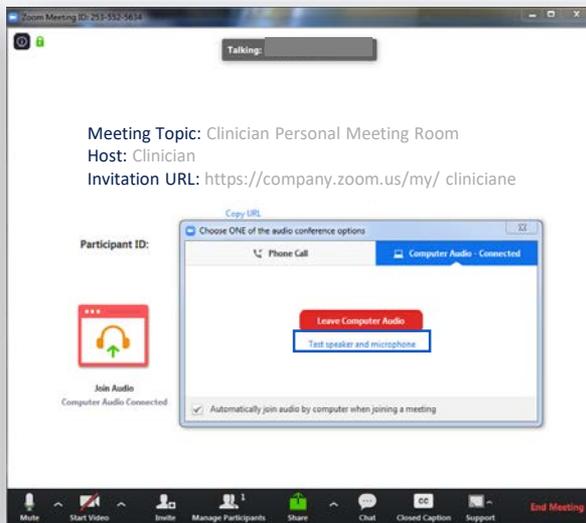
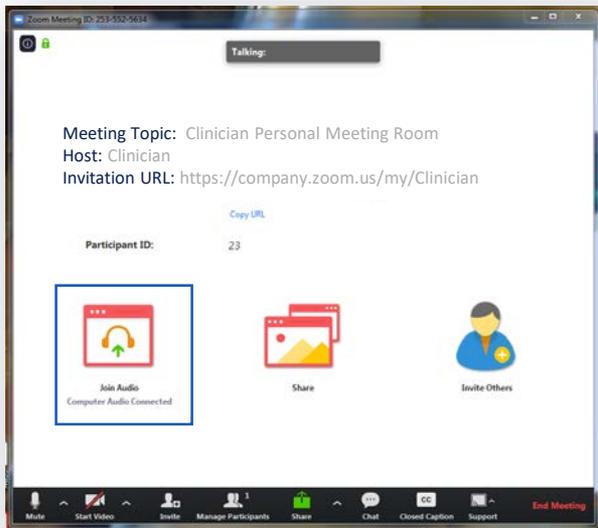
- Laptops, tablets, smartphones are all great solutions and require minimal setup
- Most plug in cameras have a microphone embedded
- If working from home, please make sure you have a way to access your EHR as well



*See Appendix A for detailed phone instructions

Audio Check

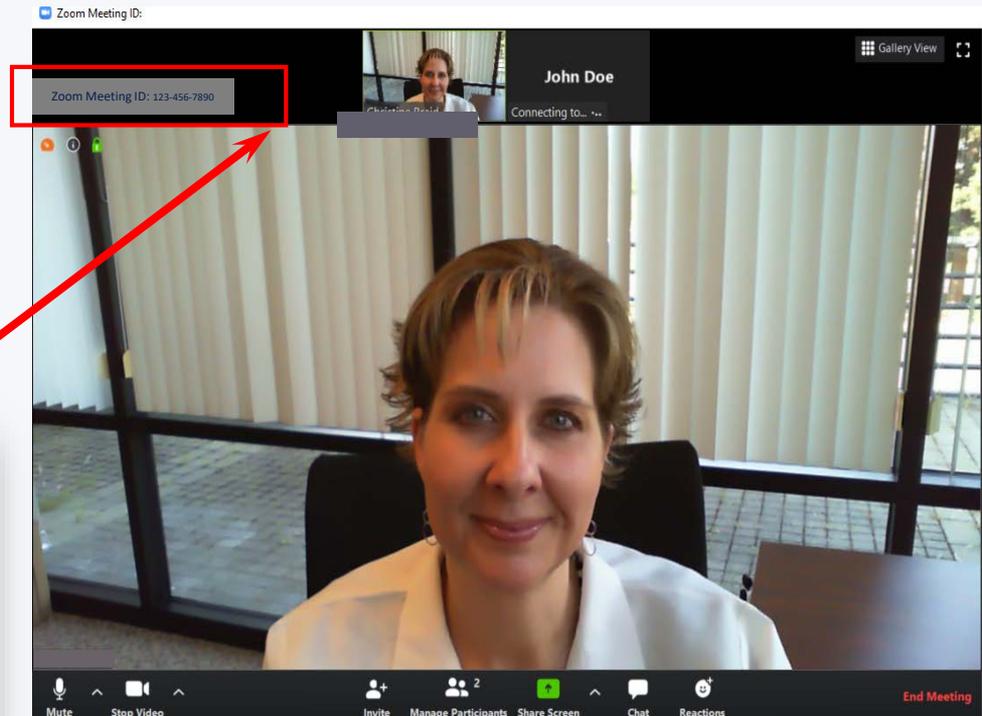
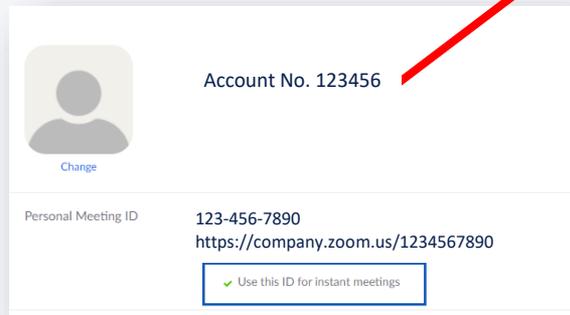
Always test your audio setting when initially logging into your Zoom Account



Clinician: Making sure I'm in the right room

Zoom Meeting ID is displayed on top left

Troubleshooting Tip: if you start a new meeting and get a different Zoom Meeting ID, check your settings and make sure the "Use this ID for instant meetings" box is checked

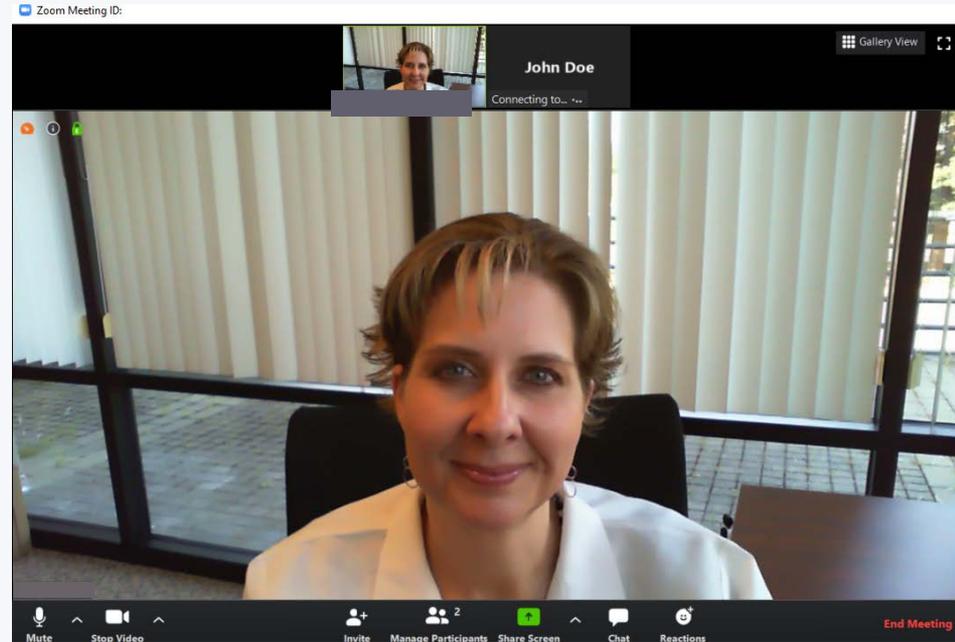


Telepresence Highlights

Do: Set up your station in a private area with a locking door

Do: Make sure background is clean and uncluttered and lighting is not directly behind you

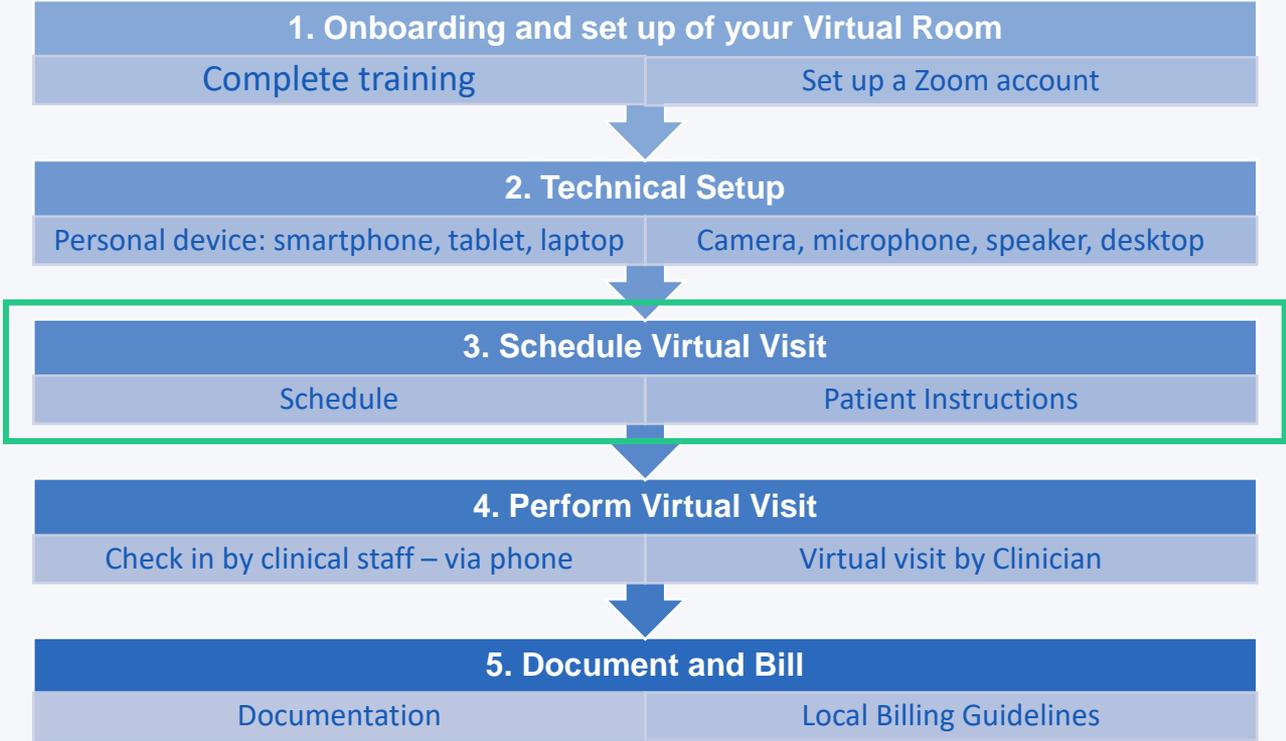
Do: Center your image in the middle of the screen



Telepresence

Highlights cont.

- Do:** If charting during the visit and looking away from the camera, explain to the patient to assure they understand you are not distracted
- Do:** Screen sharing can be utilized (if no other patient data is visible)
- Do:** If someone walks into your space during the visit, stop the visit and introduce
- Do:** Attire: Scrubs, white lab coats and name badges are highly recommended to build trust



Scheduling Virtual Visits

- Zoom is a standalone video connection and can be utilized in parallel with any EHR
- Follow the established clinic workflow to schedule appointments and establish a process to indicate on Clinician schedule that visit will be completed virtually (visit code or Clinician schedule notes)
- Send visit information to patient with link and connection directions to patient* and resend instructions with visit reminder

*comply with local privacy and security standards when using patient's email

Office Staff Process for Scheduling Zoom Patient Visit

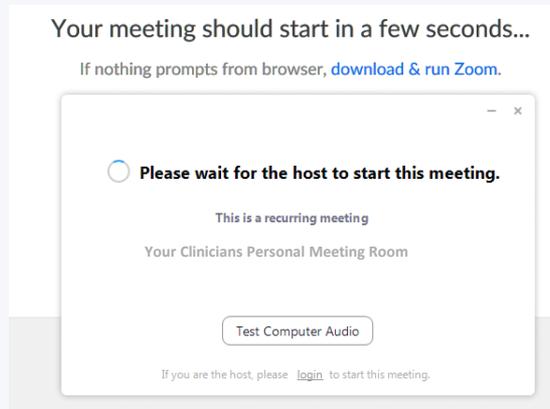
- 1) Verify that the patient is eligible for a video visit
 - a) Does the patient have a device that has a Video Camera
 - i) Cellphone, Tablet or Computer
 - (1) If the patient does not have one of these they are not eligible and can be scheduled for a phone
 - ii) If the patient does have a device with Video the patient can be scheduled for a video appointment with the Clinician
 - (1) End User will verify that patient has Zoom set up on their device before sending Video Appointment invite
 - (a) Zoom Application has to be downloaded
 - (2) Schedule Zoom Visit
- 2) Scheduling appointment with patient
 - a) Office Staff will need to document in a message the following:
 - i) Patient's Consent for Video Visit
 - ii) Determine how patient will receive Video Visit information – if by personal email, consent is needed
 - iii) Complete any required screening questions (for example COVID-19)

See Appendix C for details on optional scheduling methods for Office Staff and Clinicians

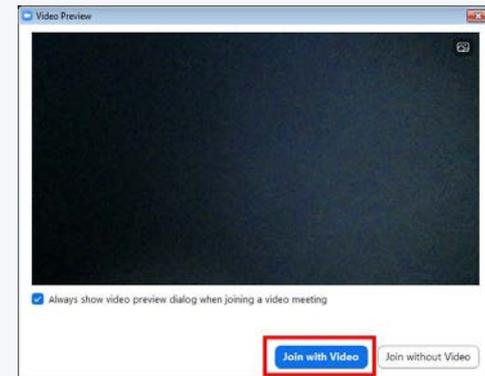
Web Browser - Patient

At time of the Video Visit

- 1) Select on link provided by clinic
- 2) Patient will receive pop up stating *Please wait for host to start this meeting*

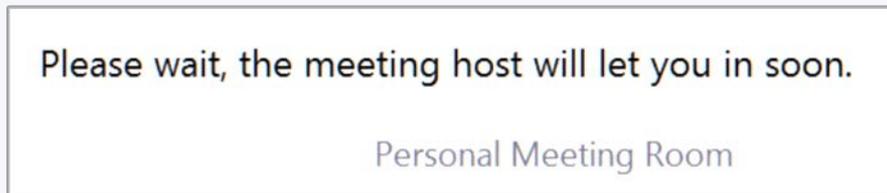


- 3) Video Preview box will populate; select **Join with Video**

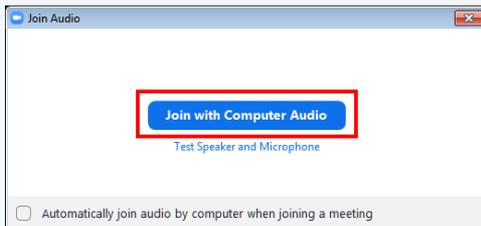


Web Browser – Patient – Cont.

4) Patient will get notification stating *Please wait, the meeting host will let you in soon*



5) Patient will need to select **Join with Computer Audio**



6) Clinician will complete video visit with patient

Smart Devices -Zoom Patients Instructions

Android:

Patient will need to download the Zoom Application

Before Video Visit with Clinician

- 1) Go to the Google Play Store
- 2) Search **Zoom**
- 3) Select **Install**



iPhone:

Patient will need to download the Zoom Application

Before Video Visit:

- 1) Go to the Apple Store
- 2) Search **Zoom**
- 3) Select **Install**



Patient Instructions

Patient instructions are designed to include device specific options. Sharing of the instructions may be tailored in your division if desired.

Sharing instructions with patients:

- 1. Through the Patient Portal (if available)
- 2. No reply email (if available)
- 3. Over the phone

*See Appendix B for detailed Patient instructions

CONTENT

Virtual Visit Instructions for: (Insert Clinician name)

Direct Link: (insert Clinicians direct room link)

Zoom Meeting ID: (Insert Clinicians PMI)

Below are the three most common ways to get into the virtual waiting room depending on the device you will be using for your

Direct link instructions:

Click on the direct link above (insert Clinicians direct room link) Follow the prompts to download **Zoom Cloud Meetings** app on your device

You will be placed in the virtual waiting room until the doctor arrives

OR

Smartphone/tablet instructions:

Download the **Zoom Cloud Meetings app**; you do not have to create an account

Click "Join A Meeting".

Type the 10 digit meeting ID provided (Insert Clinicians PMI)

You will be placed in the virtual waiting room until the doctor arrives.

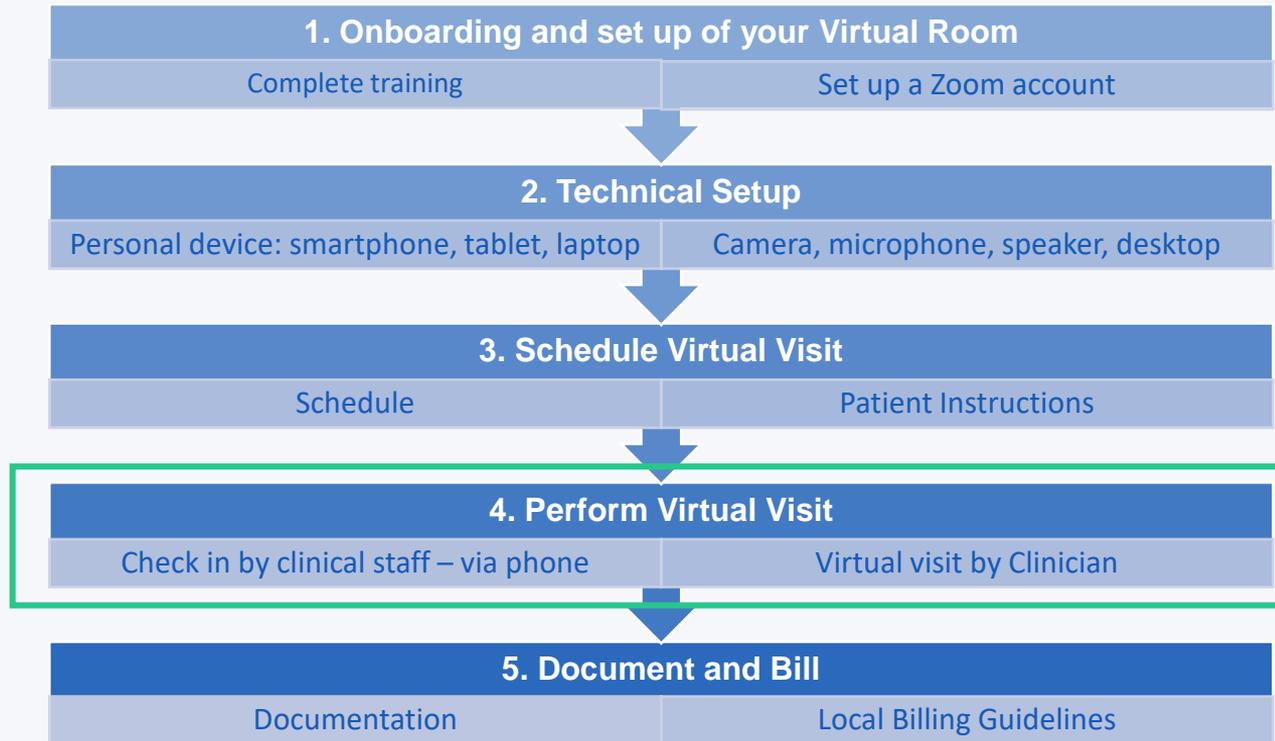
OR

Laptop/desktop computer instructions

Click on the link: www.zoom.us/join

Type the 10 digit Meeting ID provided to you by the clinic (Insert Clinicians PMI) Your device will redirect you to download the Zoom application. Follow the prompts on the screen. If prompted to download or run, select "RUN".

You will be placed in the virtual waiting room until the doctor arrives.



Medical Assistant - Recommended Workflow

Preparing Patient for a Virtual Visit

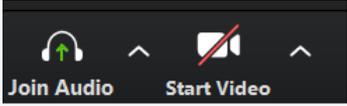
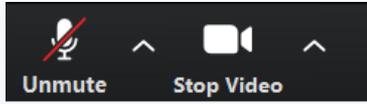
Medical Assistant (MA) Process for Video Visit

- 1) MA will **call patient 15 minutes before** scheduled appointment
 - a) Suggested Script:
 - i) **Suggested script:** *“Hello, this is Employee Name, calling from [Clinic Department Name.] I am calling you as you had requested a Video visit with [Clinician Name.] Before we get started, can you please verify your full name and DOB? And do you consent to proceed with this Video Visit? Have you successfully arrived into the Zoom Waiting Room that was emailed to you?”*
- 2) MA will make sure that the patient has been able to successfully log in to Zoom, and Audio is working (see page 29 for audio issues)
 - a) Make sure **patient adds their legal name** when logging in
- 3) Once verified, **MA will arrive the patient**
- 4) MA will **complete Vitals**
 - a) Below are the sections to be completed for Video Visit Intake (**Follow your Clinic Protocols for your Intake on regular office visits**)
- 5) Let patient know that Clinician will be with them shortly; Hang up
- 6) Let Clinician know Patient is waiting

Visit Summary – At conclusion of visit MA will send a copy of the summary to patient by either:

1. Print visit summary and mail to patient
2. Send Visit Summary through Patient Portal

If Your Patient Can't Get Audio

<p>Have the patient move their mouse. The icons on the right pop up and if it still says “Join Audio” then they have not connected to Audio</p>	 A dark grey Zoom control bar with two buttons: 'Join Audio' with a green microphone icon and 'Start Video' with a red X over a camera icon. Both buttons have an upward-pointing chevron to their right.
<p>Clinician: click on “Manage Participants” at the bottom of your Zoom screen. If the patient only has a camera icon, and not a microphone or phone icon, they have not connected to Audio</p>	 A white Zoom participant card for 'CN Clinician Name (Host, me, participant ID: 34)'. It features a purple 'CN' icon on the left and a camera icon on the right.
<p>Have the patient move their mouse. The icons on the right show up and if they are muted the audio icon will be a mic icon with a red line over it. Have patient click the icon to unmute.</p>	 A dark grey Zoom control bar with two buttons: 'Unmute' with a microphone icon crossed out by a red slash and 'Stop Video' with a camera icon. Both buttons have an upward-pointing chevron to their right.
<p>Clinician: click on the “Manage Participants” screen, the panel on the right will open with patient name. If you see a red mic icon with a slash through it, the patient was muted. Hover over the patient's name until the “Unmute” button appears and click it once to unmute</p>	 A white Zoom participant card for 'CN Clinician Name (Host, me)'. It features a purple 'CN' icon on the left and a muted microphone icon (a microphone with a red slash) on the right.
<p>If the patient is connected to audio in Zoom, it should show either a microphone (computer audio) or phone icon and say Mute underneath it</p>	 A dark grey Zoom control bar with two buttons: 'Mute' with a microphone icon and 'Stop Video' with a camera icon. Both buttons have an upward-pointing chevron to their right.
<p>Clinician: you would see the same icon in the manage participant screen</p>	 A white Zoom participant card for 'CN Clinician Name (Host, me)'. It features a purple 'CN' icon on the left and an unmuted microphone icon on the right.

Clinician Video Visit Workflow

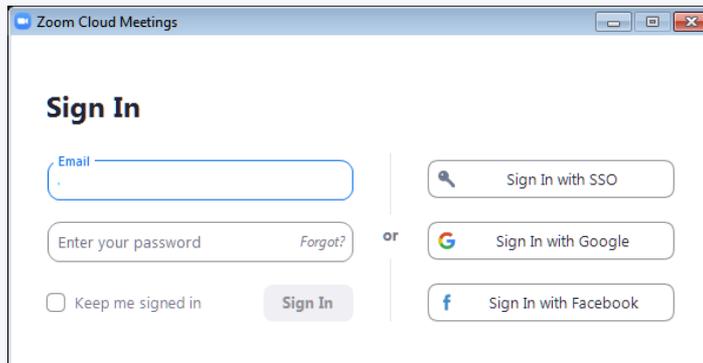
1) Open up your Zoom Account

a) Select icon on desktop



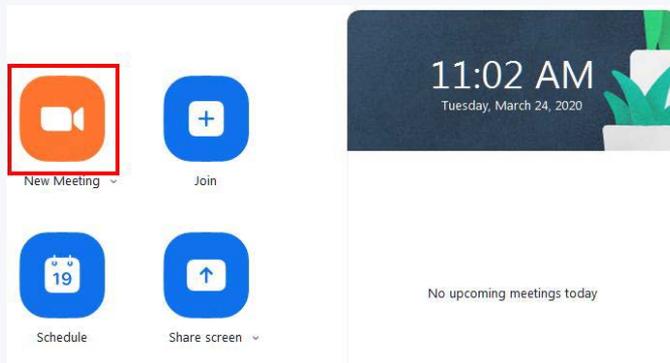
b) If no icon, use the link: <https://zoom.us/>

2) Log in to your Zoom account

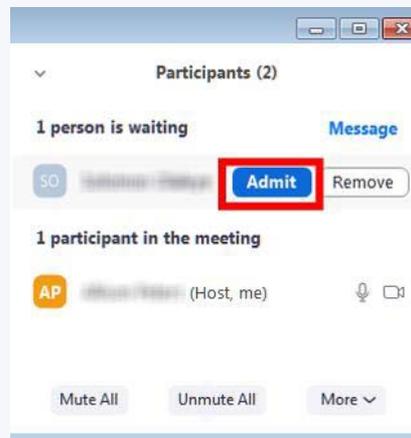


Clinician Video Visit Workflow - Cont.

3) Select **New Meeting**



4) Select **Admit** for the patient that you are having your Video Visit with

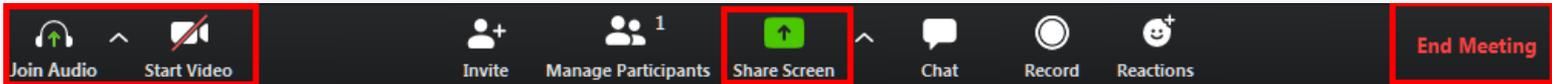


Clinician Video Visit Workflow - Cont.

5) Complete Video Visit with patient

- a) You can manage your **Audio** and **Video** Settings as well as **Share Content** with patient on the screen

6) When visit is complete, Select **End Meeting**



7) Document Visit in EHR

- a) Please include in your chart note Patient Consent for Video Visit

i) Examples Below:

(1) **Informed Consent:** Patient gave verbal consent for Video Visit

(2) **Informed Consent:** The risks, benefits and alternatives to the virtual/video visit were explained to the patient and the patient consented to this modality of care. The visit was carried out on a secure line and all parties in the room were identified and approved by the patient prior to the consult. No technical issues were experienced. A level of care equivalent to in-person care was achieved.

Patient Location:

Clinician Location:

Patient informed of treating Medical Group:

Visit Type: Secured Interactive Real Time Video

Date of Service:

State Specific Consent Requirements

Of the 21 Common Spirit Health states, written consent for telemedicine required in the following states:

- Georgia, Indiana, Ohio
- *Medicaid Only*: Colorado, Wisconsin

In most cases, documented verbal consent is sufficient.

- Recommended best practice in all states is to obtain verbal consent prior to every virtual visit and document

Reference: <https://www.cchpca.org/telehealth-policy/informed-consent>

Consent

**Consent requirements vary by state, the following recommendations are for verbal consent*

Recommended Scripting

- *“We are having this visit today on an encrypted, secure video channel. Nothing is ever recorded when we use video visits. Do I have your permission to care for you virtually?”*
- *“I want to be sure your privacy is protected.*

On my end, no one can see or hear you but me.

On your end – is there anyone else in the room with you? Is it OK if they see and hear what we are talking about today?”



Recommended Documentation

Informed Consent: The risks, benefits, and alternatives to the virtual/video visit were explained to the patient and the patient consented to this modality of care. The visit was carried out on a secure line and all parties in the room were identified and approved by the patient prior to the consult. No technical issues were experienced. A level of care equivalent to in-person care was achieved.

PATIENT LOCATION: [City, State](#)

Clinician LOCATION: [City, State](#)

PATIENT INFORMED OF TREATING MEDICAL GROUP: [Yes](#)

VISIT TYPE: [SECURED INTERACTIVE REAL TIME VIDEO](#)

DATE OF SERVICE: [Date](#)

Virtual Physical Exam

Video and Patient Assisted Exam

VS (need 3): RR, temp, height, weight, pain, LMP - document as stated

General Appearance: development, nutrition, habitus, grooming

Skin: rash, lesions, ulcerations, appearance

Eyes: conjunctivae/lids, pupils, conjunctiva.

Ears: external exam, hearing assessment. Oropharynx: mucosa, palate, tongue, tonsils

Mouth: mucous membranes, lesions, still image of posterior oropharynx (symmetric, no exudate)

Neck: ROM, symmetry, self-exam for tenderness

CV: limited to pulse, BP

Resp: retractions, accessory muscles, chest wall palpation

Abdomen: distention, tenderness

Musculoskeletal: gait, station, inspection digits and nails, exam of joints (inspection, ROM, stability), strength/tone, atrophy/abnormal movements.

Psychiatric: complete exam

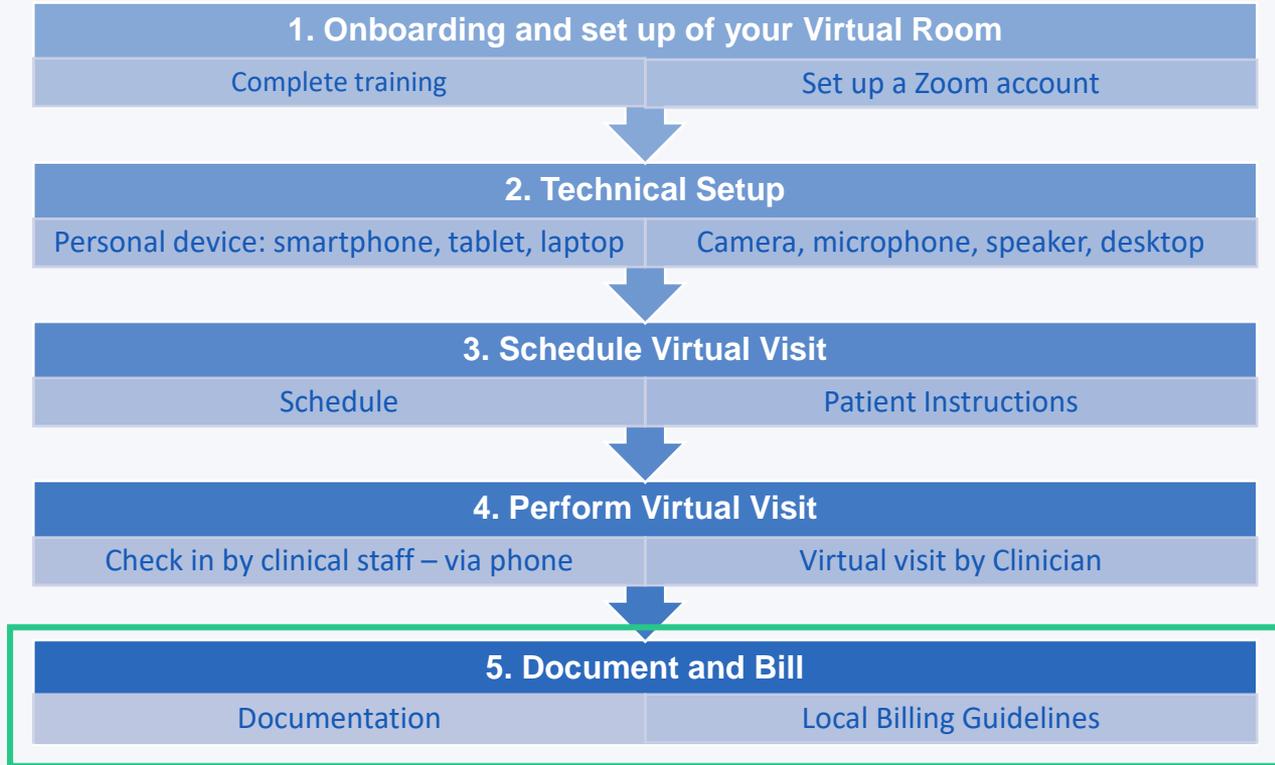
Neurologic: near complete exam, CN, sensation, strength (with assistant).



How does the visit look on my phone?

See Appendix A for detailed **Clinician** iPhone and Android instructions

See Appendix B for detailed **Patient** iPhone and Android instructions



Documentation Standards

Clinicians shall generate and maintain an electronic medical record for each patient for whom they provide care.

All communications with the patient (verbal, audiovisual or written) should be documented in the patient's medical record **on par with documentation standards of in-person visits.**

Clinicians should fully document the specific interactive telecommunication technology used to render the services. Document statement or one similar: **“Patient was seen via a secure interactive real time video”**

Recommend statement **“patient consented to service”** after informed consent has been obtained. **Document patient's location at time of service**

Billing for Virtual Visits

Varies per state: Contact your Billing and Coding department for recommendations.

COVID19:

Medicare restrictions are temporarily lifted and visits in all geographical areas are now covered during the COVID19 response (originating site “home” is still subject to specific conditions such as end stage renal disease, substance abuse with a mental health dx and Medicare Advantage)

Appendix

Appendix A – Clinician Setup (iPhone & Android)

Appendix B – Patient Setup (iPhone & Android)

Appendix C – Recommended Office Staff Process

Appendix D – Troubleshooting

Appendix E - Software Support/Help

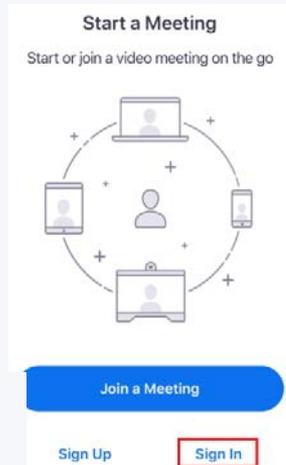
Appendix A

Instructions for iPhone

- 1) After you have signed up on your desktop; go to the **Apple Store**
- 2) Search **Zoom**
- 3) **Install** and select **Open**



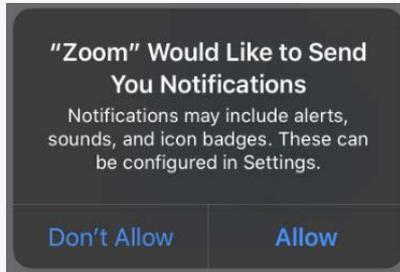
- 4) **Sign in**



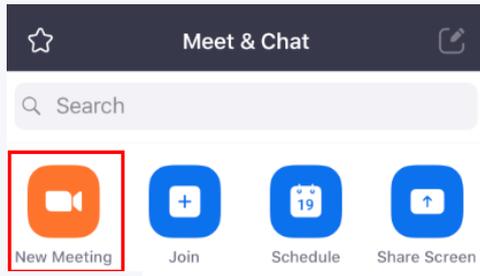
Appendix A

Instructions for iPhone - Cont.

5) Choose your desired settings



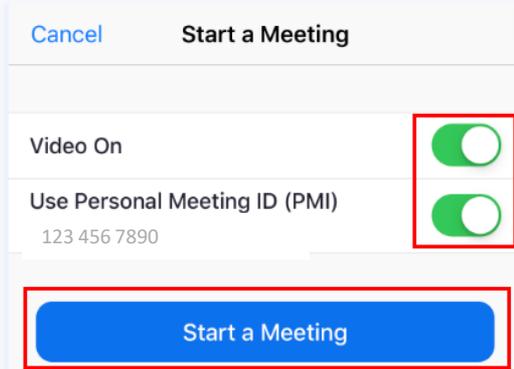
6) Select **New Meeting**



Appendix A

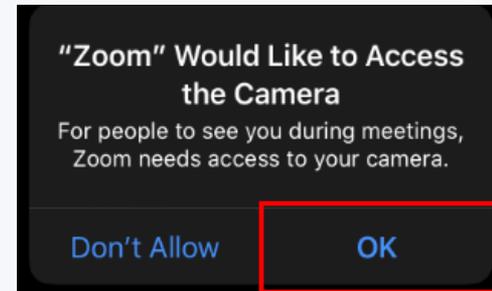
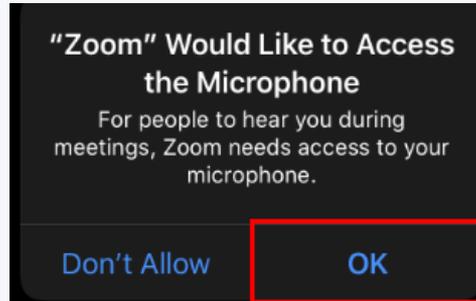
Instructions for iPhone - Cont.

7) Make sure **Video** and **PMI** are set to **ON**; Select **Start Meeting**



8) Select **Allow** for *Microphone*

9) Select **Allow** for *Camera*



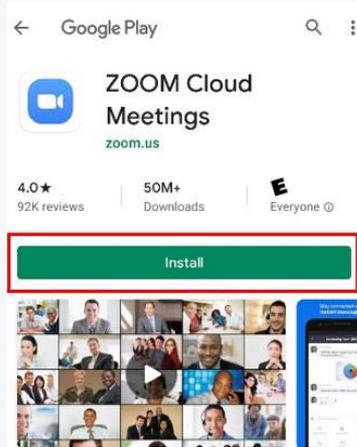
Appendix A

Instructions for Android

1) After you have signed up on your desktop; go to the **Google Play Store**

2) Search **Zoom**

3) Select **Install**



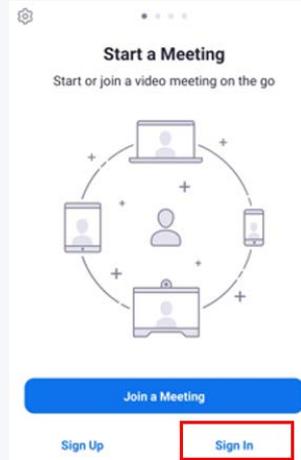
4) Select **Open**



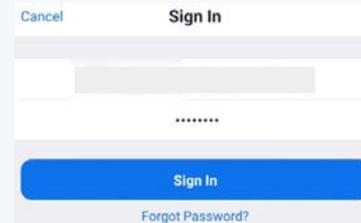
Appendix A

Instructions for Android – Cont.

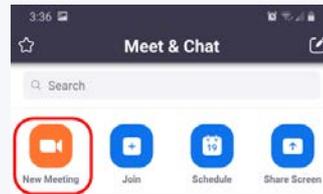
5) Select **Sign In**



6) Enter **Email and Password**; Select **Sign In**



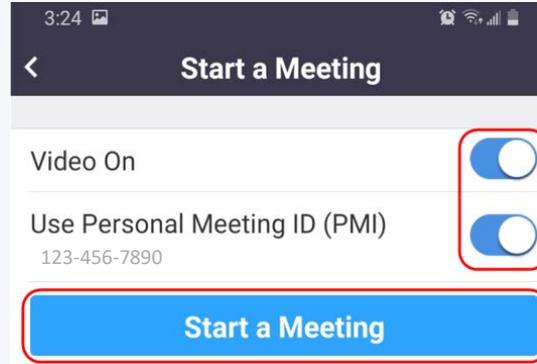
7) Select **New Meeting**



Appendix A

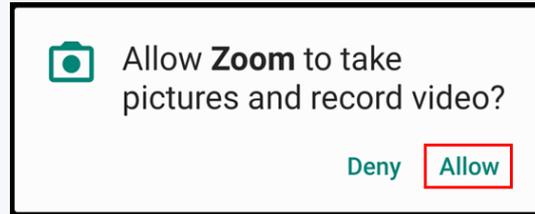
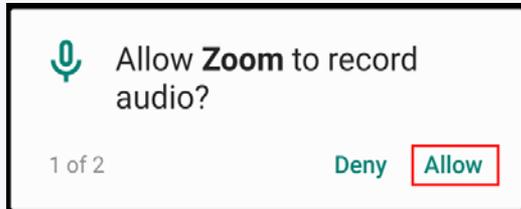
Instructions for Android – Cont.

8) Make sure **Video** and **PMI** are set to **ON**;
Select **Start Meeting**



9) Select **Allow** for *Audio*

10) Select **Allow** for *Video*



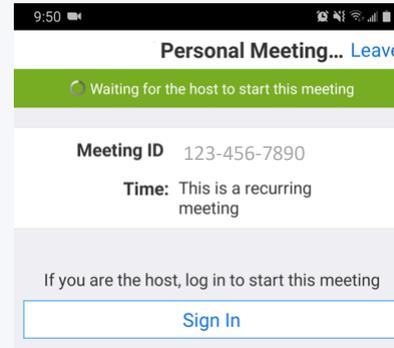
Appendix B

a) Zoom Patients Instructions

At time of the Video Visit

- 1) Select link provided by office
- 2) Patient will be directed to the Zoom application
 - a) Patient will have a notification stating
" *Waiting For The Host To Start This Meeting*"

- 3) When Clinician starts the meeting, the patient may be prompted to enter their name. Please enter *Legal Name*; Select **OK**

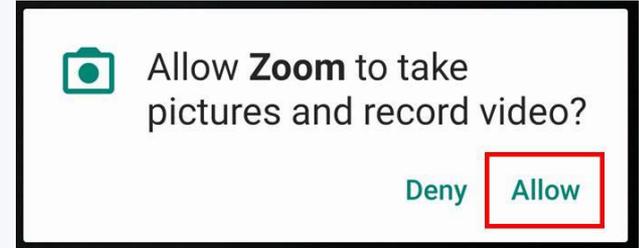
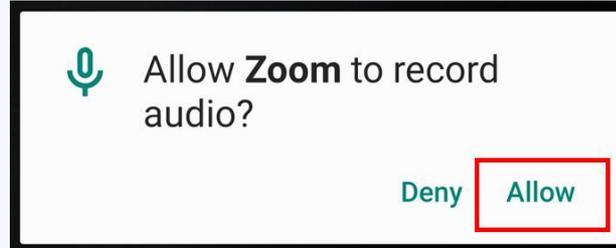
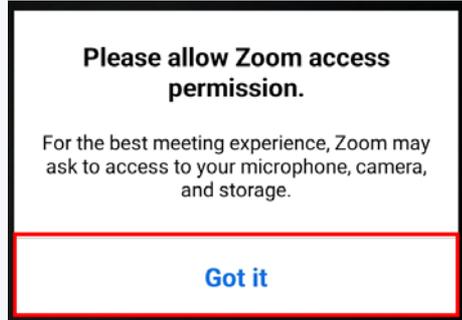


Appendix B

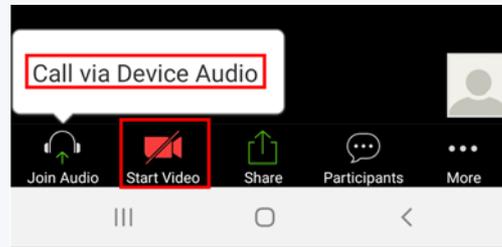
a) Zoom Patients Instructions – Cont.

4) Once patient is let in to the Meeting room they will have to choose **Call via Device Audio**

a) If this is the first time patient is using Zoom they will have to **allow** the application to use **Audio and Video**



5) Connect to Audio and Video

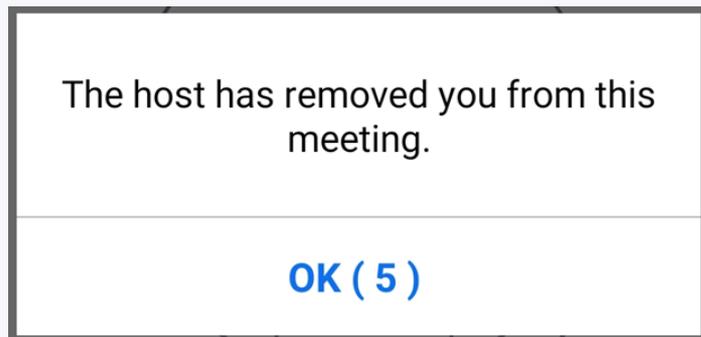


Appendix B

a) Zoom Patients Instructions – Cont.

6) Patient will have video visit with Clinician.

7) Patient will get the following notification when the meeting has ended



Appendix B

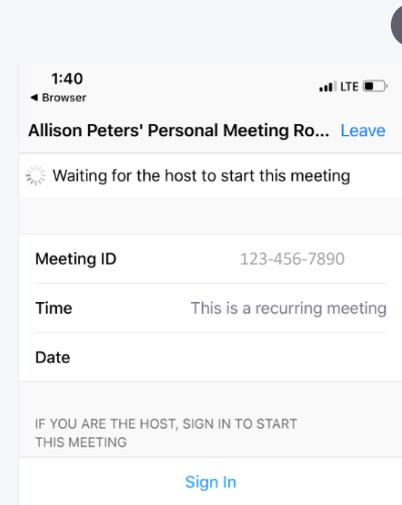
b) Patient i-Phone

At time of video visit

- 1) Select link provided by office
- 2) Patient will be directed to the Zoom application
 - a) Patient will have a notification stating

Waiting For The Host To Start This Meeting

NOTE: Patient needs to ensure they are not in **“Safe Driving Mode”** on their phone as that will impede audio.

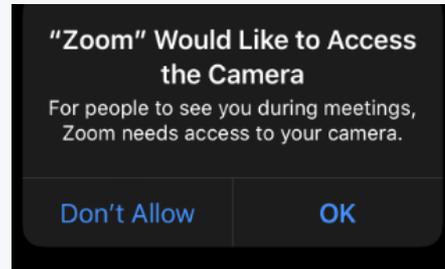


Appendix B

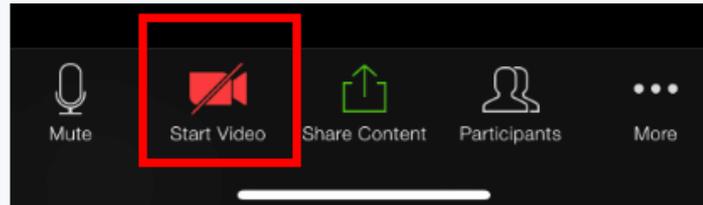
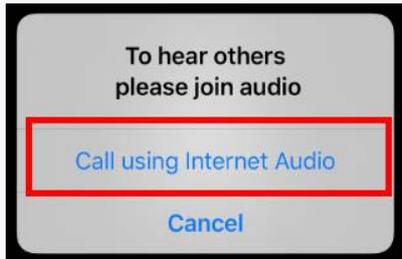
b) Patient iPhone – Cont.

3) Once patient is let in to the Meeting room they will have to choose **Call via Device Audio**

a) If this is the first time patient is using Zoom they will have to **allow** the application to use **Audio and Video**. (please make sure that you are not in “Safe Driving Mode”)



4) Connect to Audio and Video. Patient is ready to have a video visit with clinician

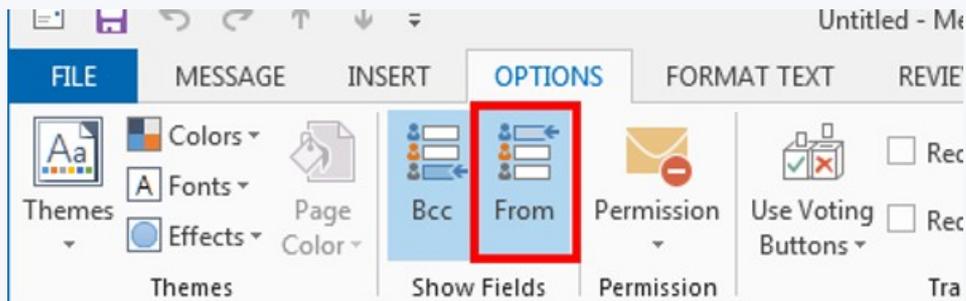


Appendix C

Option #1: Sending Zoom Visit Information Via Personal Email

Option #1: Sending Zoom Visit Information Via Personal Email

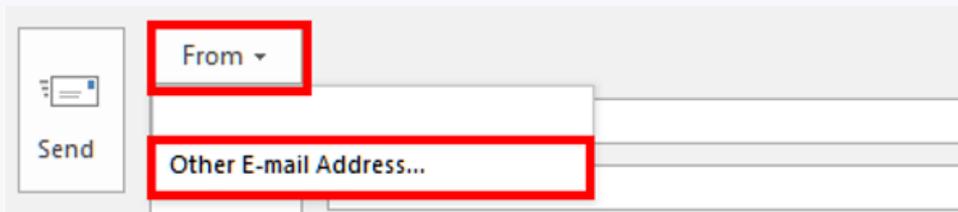
- 1) Before email is sent, **MUST Verify with patient: (Please document in message in EMR)**
 - a) That it is ok to do a Video Visit
 - i) If not ok, offer Phone Visit
 - b) That it is ok to send Video Visit information to the patients personal email
 - i) If the patient does not want the information to go to their personal email, it will have to be sent to the **Patient Portal**
 - (1) Sign Patient Up for Portal if they are not on it
- 2) Select **From** button under **Options**



Appendix C

Option #1: Sending Zoom Visit Information Via Personal E-mail cont.

- 3) Select the **From** drop down and select *other E-mail Address* and proxy into your clinic generic email provided by your managers.
 - a) **NOTE:** You will only have to add this once; after that it will remain in this drop down



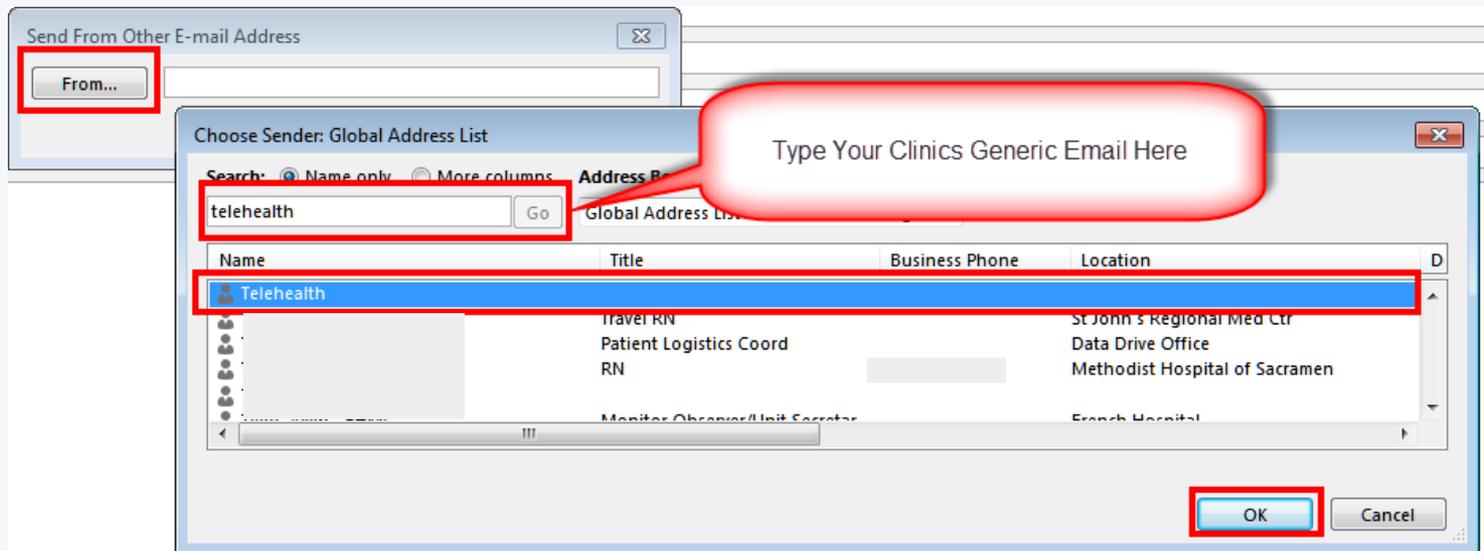
The image shows a portion of an email client interface. On the left, there is a 'Send' button with a paper plane icon. To the right of the button is a 'From' dropdown menu. The dropdown menu is open, showing a list of email addresses. The first address in the list is highlighted with a red box and contains the text 'Other E-mail Address...'. The 'From' dropdown menu itself is also highlighted with a red box.

- 4) Select **From** and Search for your generic email Address provided to you by your Clinic Manager
 - a) Patients will not be able to reply to this email

Appendix C

Option #1: Sending Zoom Visit Information Via Personal E-mail cont.

- 4) Select **From** and Search for your generic email Address provided to you by your Clinic Manager
 - a) Patients will not be able to reply to this email



Appendix C

Option #1: Sending Zoom Visit Information Via Personal E-mail cont.

- 5) Select the **To** button; enter **Patient Email** under **To**; Enter **Clinician Email** under **Bcc** if they would like a notification sent by email as well.
- 6) Select **OK**

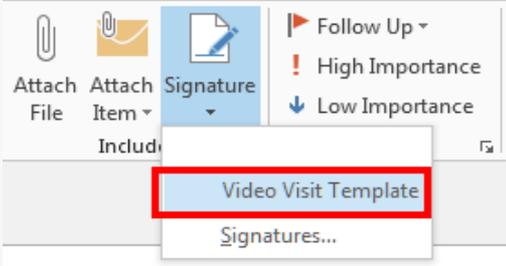
The screenshot shows an email composition window with the 'From' field set to 'Telehealth@DignityHealth.org'. The 'To...' field is highlighted with a red box. A red arrow points from this field to the 'To ->' button in the 'Select Names' dialog box. The dialog box is titled 'Select Names: Global Address List' and has a search bar containing 'Global Address List'. Below the search bar is a table with columns: Name, Title, Business Phone, Location, and D. The table contains several entries, with the first one highlighted in blue. Below the table are three input fields: 'To ->' with the placeholder text 'Type Patients Email Address Here', 'Cc ->', and 'Bcc ->' with the placeholder text 'Type Providers Email Address Here'. The 'To ->' and 'Bcc ->' fields are also highlighted with red boxes. At the bottom right of the dialog box are 'OK' and 'Cancel' buttons, with the 'OK' button highlighted by a red box.

Name	Title	Business Phone	Location	D
[Name]	[Title]	[Business Phone]	[Location]	[D]
[Name]	[Title]	[Business Phone]	[Location]	[D]
[Name]	[Title]	[Business Phone]	[Location]	[D]
[Name]	[Title]	[Business Phone]	[Location]	[D]
[Name]	[Title]	[Business Phone]	[Location]	[D]

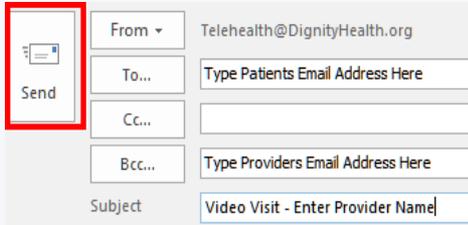
Appendix C

Option #1: Sending Zoom Visit Information Via Personal E-mail cont.

- 7) Subject Video Visit – Enter Clinician Name
- 8) Select Signature and Choose the Signature for the Clinician you are scheduling the Zoom Visit for
 - a) Make sure you delete your personal signature if you have one



9) Select Send



Appendix C

Option #2: Office Staff Scheduling Visit Via Calendar

1) Open **Outlook** and go to the **Calendar** section



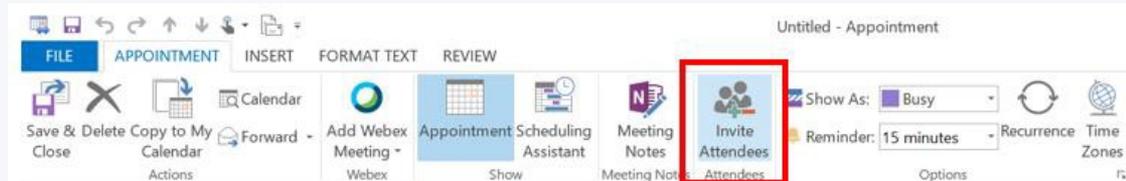
2) Select your Shared Calendar



Appendix C

Option #2: Office Staff Scheduling Visit Via Calendar

- 3) **Double Click** the *date and time* you want to schedule the Zoom Visit
- 4) Select Invite Attendees



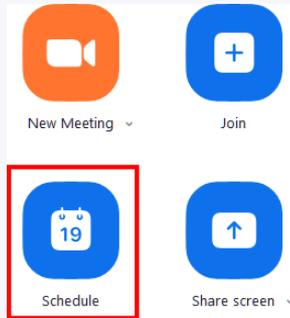
- 5) Select the **To** Button
- 6) Under **Required** enter the patients email
- 7) Under **Resources** enter the Clinicians Email (Patients will not be able to see Clinician email)

Appendix C

Option #3: Clinician Scheduling Visits

NOTE: Patient will get your email address

1) Select the Schedule Icon



Appendix C

Option #3: Clinician Scheduling Visits Cont.

- 2) Schedule Box will populate
 - a) Verify the appropriate boxes are selected
 - b) Clinician **MUST Enter Password** if scheduling their own visits
 - c) Select Schedule

The screenshot shows the 'Schedule meeting' dialog box with the following settings highlighted by red boxes:

- Topic:** Zoom Meeting
- Start:** Thu April 2, 2020, 09:00 AM
- Duration:** 0 hour, 30 minutes
- Recurring meeting:**
- Time Zone:** Pacific Time (US and Canada)
- Meeting ID:** Generate Automatically, Personal Meeting ID 123-456-789
- Password:** Require meeting password, Password
- Video:** Host: On, Off; Participants: On, Off
- Audio:** Telephone, Computer Audio, Telephone and Computer Audio
- Calendar:** Outlook, Google Calendar, Other Calendars
- Advanced Options:** Enable waiting room, Enable join before host, Mute participants on entry, Automatically record meeting on the local computer

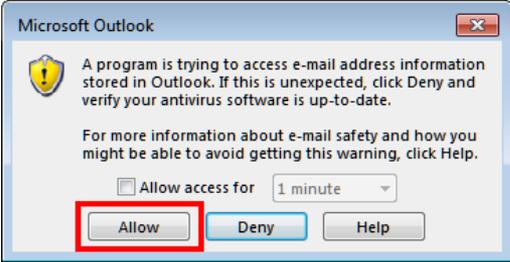
A callout bubble points to the password field with the text: "Provider **MUST** enter a Password if sending their own invites".

Buttons at the bottom: **Schedule** (highlighted), Cancel

Appendix C

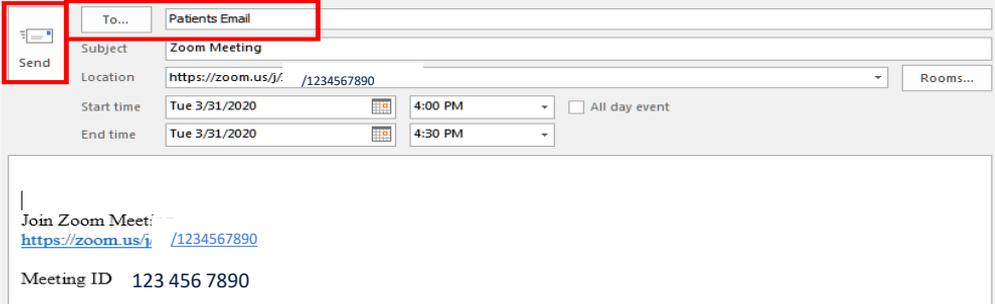
Option #3: Clinician Scheduling Visits Cont.

3) Select **Allow** (may have to select multiple times)



4) Enter Patients email in the **To** Box

5) Select **Send**



Appendix D

24/7 Support

When calling the help desk please state that you need support for the **HIPPA Compliant Zoom Platform**.

You will then be routed to the Zoom support group

IT Help Desk #: 1-877-321-0057