Instructions for Group Patient Education

Zoom for Healthcare

Prior to hosting a group patient education, please visit the Virtual Care Zoom for Healthcare Website. For Advanced Training Sessions please visit the Zoom for Healthcare Training Page.

A Group Patient Education Session refers to a clinical appointment that involves more than one patient and/or caregiver. Group patient education sessions can fall under one of the following categories:

· *Self-referral or voluntary group patient education:* Health care providers (HCP) are not required to register patients. Patients can choose to attend these sessions as it relates to their health and wellness.
· *Referred group patient education:* Health care providers are required to register patients. Attendance is part of their care plan.

This guideline is intended to highlight key requirements related to the provision of virtual care for group patient education. HCPs must be aware of any established clinical practice guidelines for their profession and are encouraged to review the Guidelines for Healthcare Providers- Zoom for Healthcare, NSHA Virtual Care Policy, IWK Telepractice Policy and the NSHA Electronic Messaging Policy for more information.

This document outlines the following items:

Organizing the Group Patient Education Session

Informed implied consent from participants is required for group patient education.

- For *referred* and *self-referred* sessions, at the beginning of each session the HCP must display the introduction slide and read the script.
  For *referred only*, HCPs are responsible to **verify the identity of patients** via the **two client identifiers** (as per client identification policy) before beginning a virtual group patient education session.

Advance Preparation / Test Calls: Test calls with individual patients in advance of the appointment are highly *recommended.* Test calls can assist with technical issues and avoid delays in the actual group patient education session. Patient information can be collected (e.g., phone number, address, next of kin, and health card) at that time, and in addition, the patient name displayed in Zoom can be changed. All patients need to be advised that other participants will see their full names, profile pictures and videos if this is not changed in advance.

It may be beneficial to use the first session as an introduction and orientation to the group guidelines and Zoom review.

Group Size:
Size of group patient education sessions/appointments may vary and is up to the discretion of the health care provider based on comfort level, desired interaction and presentation format.

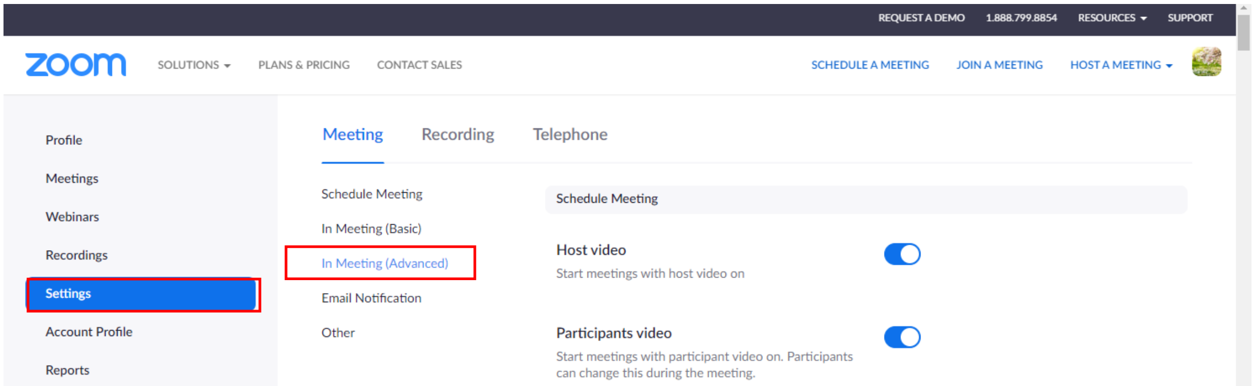
Recording:
Recording is not enabled in Zoom due to privacy requirements and is not permitted.

Documentation:
HCPs are responsible to **ensure the following items are documented** in the patient's health record **in addition** to any applicable standardized documentation policy and procedures. Documentation of a patient's attendance at a group patient education session is required for *Referred* Group Patient Education. HCPs should note:

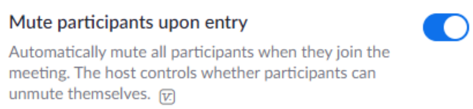
- Zoom for Healthcare was used to communicate
- The patient's location (home, work place, etc.)
- Any incidents/comments that impacted the delivery of care (only if applicable)
- Any significant technical issues (only if applicable)

Account Settings

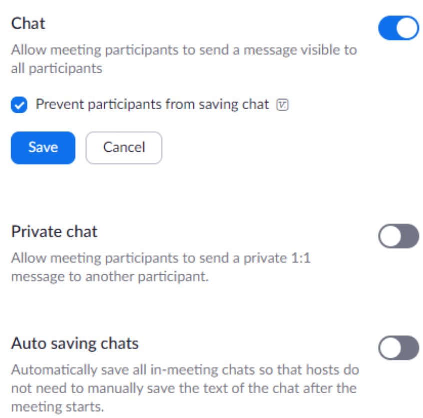
Prior to scheduling a meeting, adjust the licensed host's account settings.
Log onto nshealth.zoom.us and sign into your Zoom for Healthcare account.
From the left menu, chose "Settings" and chose "In Meeting (Advanced)"



1) **Mute participants on entry:** It is r*ecommended* to enable this feature so that patients' conversations upon entry will not be overheard. The host also has control over muting and unmuting participants throughout the live appointment.



2) **Chat**: It is r*ecommended* to disable private chat so participants cannot send private messages. **Disabling the chat** for all participants is recommended for *self-referred* education sessions. Chat is useful for trouble shooting during calls. For example if you need to tell someone you cannot hear them, chat is handy. Note that if a patient enters inappropriate content in the chat window, there is no way the host can delete the inappropriate words without ending the call for everyone and requesting people rejoin the call.

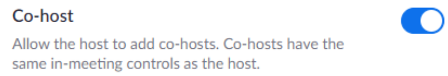


3) **Co-host:** If you have a co-facilitator, it is *required* to enable "co-host". Co-hosts have the most of the same in-meeting controls as the host. The co-host can function as a secondary facilitator by monitoring chat, sending private messages to patients, muting individuals, putting participants in waiting rooms, removing participants who may be disruptive, monitoring the participant list for raised hands. A host can make more than one participant a co-host simultaneously.

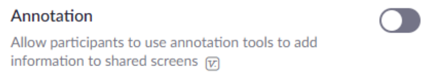
Co-Hosts *cannot*:

- End meeting for all participants.
- Start breakout rooms or move participants from one breakout room to another.

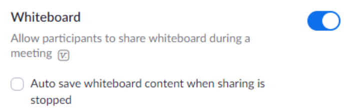
- Start waiting room (co-hosts can place participants in waiting room or admit/remove participants from the waiting room).
- Start a meeting. If a host needs someone else to be able to start the meeting, they must assign an alternative host when scheduling a meeting.



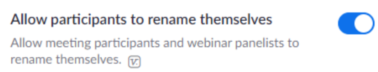
4) **Annotation:** Annotation allows participants to use annotation tools to add information to shared screens. It is *recommended* that this feature is disabled.

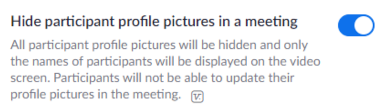


5) **Whiteboard:** Whiteboard, by default, is turned off for all NSHA/IWK accounts because participant screen share is disabled. However, hosts are able to overrule this setting for a meeting if you wish to use this feature. Enable whiteboard in account settings.

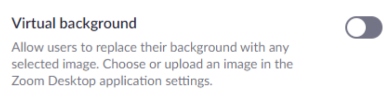


6) **Rename:** It is r*ecommended* to allow participants to rename themselves. Enable for anonymity. In addition, it is *recommended* to hide participant profile pictures. (You can permanently change your name in your profile. Organizers may wish to include rename instructions on the waiting room page.)

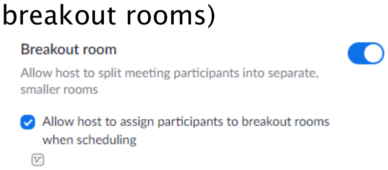




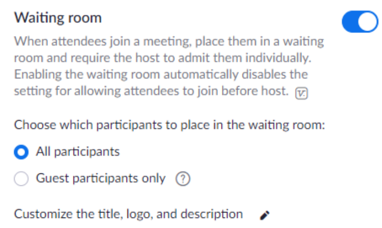
7) **Virtual Background:** It is r*ecommended* to leave this feature disabled as this prevents you from seeing someone's physical space and potentially whether there is someone else in the room with them.



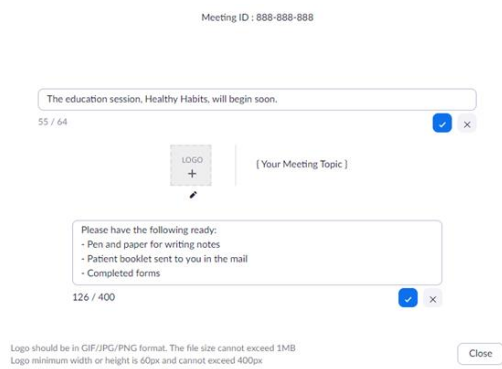
8) **Breakout Room:** It is r*ecommended* to enable if you plan to use this feature. (Co-hosts do not have privileges to assign breakout rooms)



9) **Waiting Room:** *Required*. The host has control over who enters the appointment and in what order.
Waiting Room Customization: It is *recommended* to customize the title and description. Directions on how to [insert a unique message for your Waiting Room](#).


Waiting room
When attendees 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 attendees to join before host.
Choose which participants to place in the waiting room:
All participants
Guest participants only
Customize the title, logo, and description

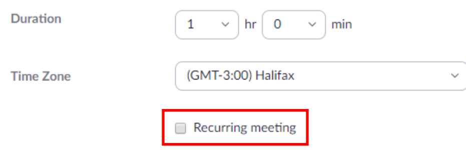
Example:


Meeting ID : 888-888-888
The education session, Healthy Habits, will begin soon.
55 / 64
LOGO
{ Your Meeting Topic }
Please have the following ready:
- Pen and paper for writing notes
- Patient booklet sent to you in the mail
- Completed forms
126 / 400
Logo should be in GIF/JPG/PNG format. The file size cannot exceed 1MB
Logo minimum width or height is 60px and cannot exceed 400px
Close

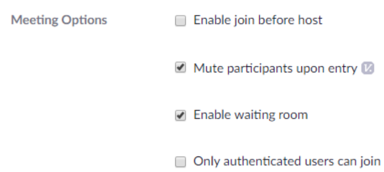
Scheduling the Meeting

Follow basic meeting scheduling guidelines. There are three settings that relate to group education that need to be considered.

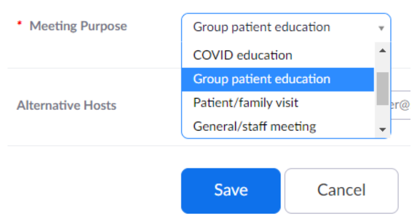
1) **Recurring Meeting:** It is NOT *recommended* to use the recurring meeting feature. If you need to remove a patient, remember the patient would have the ID and password to rejoin the meeting. If the patient arrives in the waiting room, do not admit or remove them from the meeting.



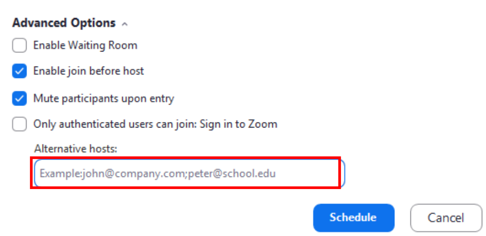
2) **Meeting Options**
   Mute participants upon entry: *Recommended*
   Enable waiting room: *Required*



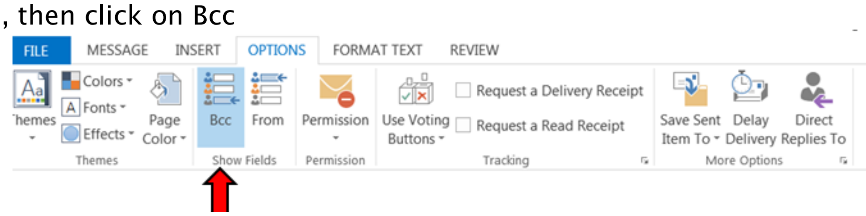
3) **Meeting Purpose:** Choose 'Group patient education' in the required Meeting Purpose field.



4) **Alternative Host:** If you have multiple group facilitators, enter their email address under 'alternative hosts'. The alternate(s) is able to directly enter the meeting without having to wait in the waiting room. If the alternative host is first to arrive, they become the host. The host whose license was used to schedule the meeting can take back host privileges from an alternative host.



5) When sending an email to groups of patients, in outlook, from the top menu, select "OPTIONS", then click on Bcc



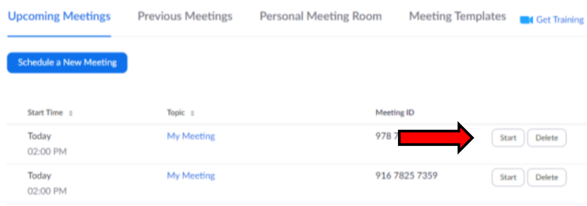
Add participant e-mail addresses to the **"Bcc…" field <u>ONLY</u>**. This will ensure participants cannot see each other's e-mail addresses.

<u>**Conducting the Appointment**</u>

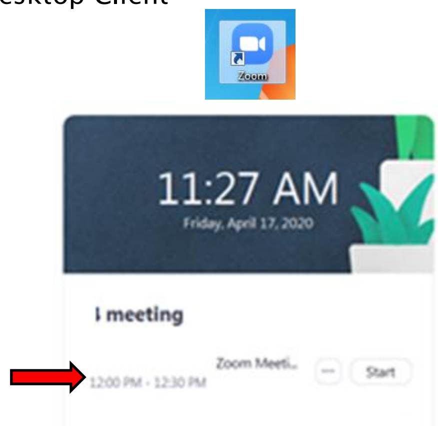
1) We recommend that the host use a PC or Laptop rather than a mobile device.

2) ***"Open" the meeting:*** At least 15minutes before the meeting is scheduled to begin, sign into nshealth.zoom.us to start the meeting using the web portal (*recommended*) or open the desktop client and pick the appointment from the meeting list.

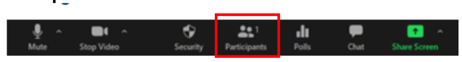
Web Portal



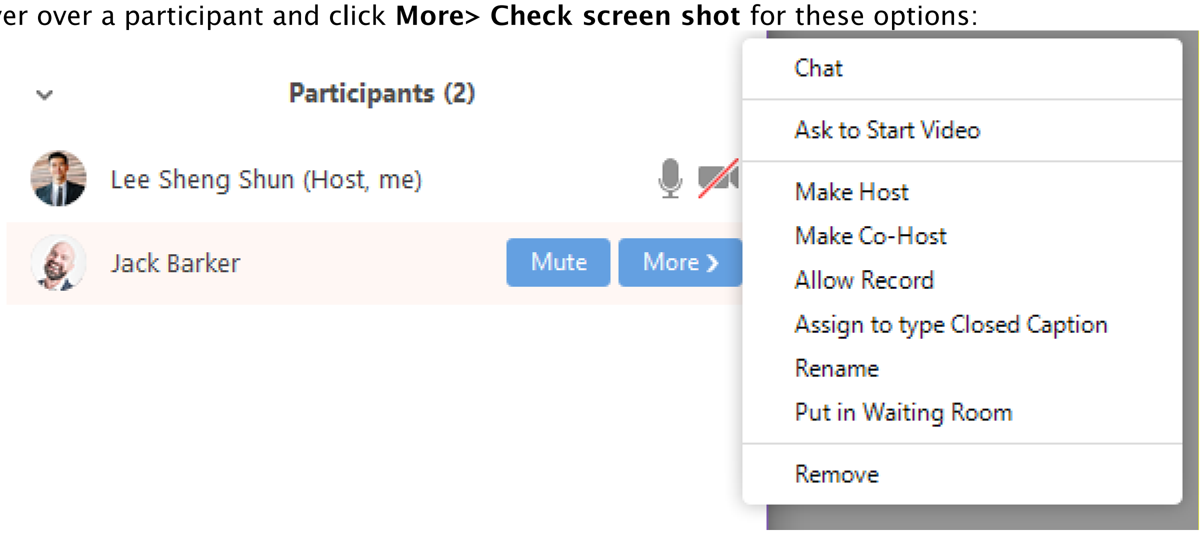
Desktop Client



3) When a participant joins, they are placed in a virtual waiting room. Click **Participants** in the host controls to display the participants list.



Hover over a participant and click **More> Check screen shot** for these options:



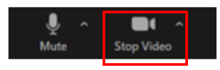
4) If you have not previously assigned your other facilitator as an alternative host, click on participant list and admit the other facilitator from the waiting room first and give them **co-host** privileges. To do this, hover over the co-host's name, click the more> icon and click Make Co-Host.

5) **Verify Patient Identities, HCN, Phone numbers and Locations:** Two client identifiers from each patient is *required*. The recommended procedure for this is to bring patients, one at a time, into the meeting and then return to waiting room (put in waiting room) again and document as required (see page 2).
See 'Advanced Zoom Training' document for details on using the waiting room.

6) **Rename:** If this is *not done in advance* of the group education during a test call, while privately in the appointment, it is *recommended* that the host rename a patient's display

name to their initials or first name when anonymity is required. This may require moving people individually in and out of the waiting room prior to the session. This name change only applies to the current meeting. To change your name that is displayed, hover over your name in the participants list and click Rename.

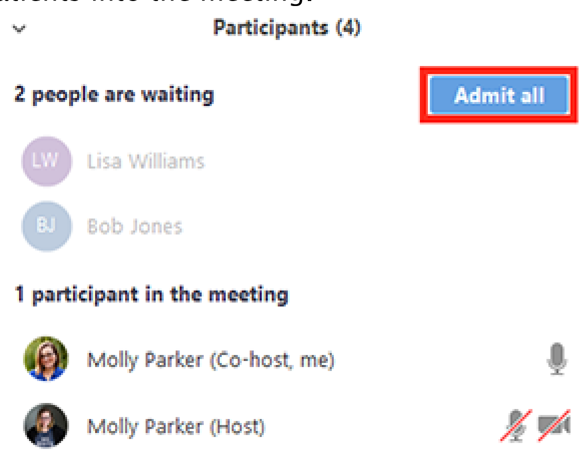
7) **Display Videos:** It may be necessary for patients to not display videos for anonymity reasons however some groups may require videos on. While bringing patients into the meeting, the host can ask patients to start and stop their video verbally or the host can stop the participant's video stream so they are unable to start their video. If the participant hasn't started their video, you will see the 'Ask to Start Video' in the participant list, the participant will get a message asking them to allow the host to start their video. A host cannot automatically start a video without the participant's permission.



8) **Sharing Screen:** The host is the only one who can share their screen with others. We do not recommend sharing desktop as pop ups and other desktop programs/documents could be observed by participants. Hosts can assign multiple co-hosts to allow others to share their screens as needed. Go to participant list and click more> and choose 'make co-host'.

9) Share screen and display the [Introduction Slide- Zoom for Healthcare](#).

10) **Admit all** and welcome patients into the meeting.

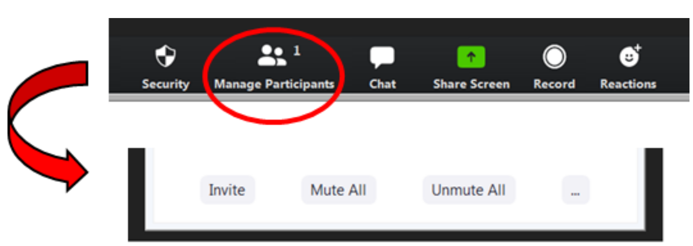


11) At the beginning of every appointment, read the [Script for Provider- Zoom for Healthcare](#).

12) Review any additional guidelines you may want share with your group before you begin the session (i.e. session guidelines, goals, expectations, etc.)

13) To lock the video on the main speaker, use the "**spotlight**" feature. To use this feature, hover over the video of the participant you want to spotlight and from the menu, choose Spotlight Video.

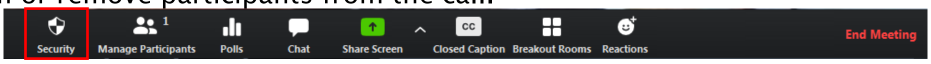
14) If you would like to add participants or **manage participant options** (i.e. mute one or all participants) once the meeting has started, click "Manage Participants" at the bottom of your screen.



15) The host continues to present the meeting and materials until the end of the meeting.

16) The host is *required* to “***End Meeting for All***” to disconnect all participants so that patients cannot stay in the zoom meeting after facilitators leave the call.

***Security:** To respond to inappropriate activity, it is *recommended* that hosts use the security button. The control allows the host to quickly lock the meeting, send participants into the waiting room or remove participants from the call.



Group Patient Education Checklist

Advance Preparation

- Schedule and perform test call with individual patients:
  Obtain verbal informed consent, confirm identity, phone number, address, next of kin contact, HCN, adjust name displayed and document on patient chart if applicable and provide program specific info/requirements for participation

Meeting 'Settings'

Navigate to nshealth.zoom.us, sign in and in settings:

Setting	Required/Recommend	Default Setting	Notes
Mute participants on entry	Recommend Enable	Disabled	
Private chat	Recommend Disable	Enabled	
Chat	Recommend Enable	Enabled	**Disable for public education
Co-host	Required Enable	Enabled	*if you have a co-facilitator
Annotation	Recommend Disable	Enabled	
Whiteboard	Recommend Disable	Enabled	
Rename	Required Enable	Enabled	
Profile Picture	Required Disable	Disabled	Chose to hide profile pictures
Virtual Background	Required Disable	Enabled	
Breakout Room	Recommended Enable	Enabled	
Waiting Room	Required Enable	Enabled	
Waiting Room Customization	Recommended	Enabled	

'Schedule a Meeting' Group Settings

- Enter the Topic (Name of the Group)
- If the group is reoccurring, select the "Recurring Meeting" box. (Not recommended)
- "Password" (Required)
- "Video" for host is 'On', and select either 'On' or 'Off' for participants (Recommended On)
- "Audio" is set to 'Computer Audio' only (Recommended)
  (If using 'both' phone and computer, advise of long distance charges)
- Meeting Options: Uncheck join before host, Check mute participants upon entry. (Recommended) Check enable waiting room (Required),
- Copy the link, meeting ID and password and send email to participants using Bcc. (Required)

Using Outlook (Optional)

- When scheduling a meeting, Set "Calendar" to 'Outlook'
- Click "Schedule". (An Outlook meeting appointment window opens.)
- Within Outlook, set meeting recurrences, (not recommended)
- Copy Link, ID and PW from outlook meeting appointment text box.
- "Save & Close" the meeting
  **IMPORTANT: Do not add meeting participants at this stage. A separate e-mail must be sent to protect privacy of client's e-mail addresses*
- Open a *new* Outlook e-mail message from you HCP or a General clinic Email account
- From the top menu, select "OPTIONS", then click on Bcc
- Add participant e-mail addresses to the "Bcc..." field ONLY
- Add yourself or your 'general' clinic email to the "To..." field
- Paste the meeting information. Ensure the web url address is blue underlined
- Open Virtual Care email invitation template
- Paste the Virtual Care e-mail invitation template and include relevant attachments (Patient Tips for Virtual Visits and Patient Information Guide for Zoom). Adjust text for your specific group. **Do not include any PHI in the meeting invitation email.** Add the clinic contact information to the end of the email (Required)

Conducting the Appointment

- "Open" the meeting 15minutes in advance
- Click Manage Participants to display the participants list
- Admit cohost or secondary facilitator (give cohost privileges)
- If verifying identity etc. is *not done in advance* of the group education during a test call, it is *required* to verify their identities as patients arrive. Bring patients, one at a time, into the meeting and then return to waiting room (put in waiting room) again and document:
  - Double patient identifiers
  - MSI health card number (HCN)
  - Current phone number
  - Current physical location (address)
  - Next of Kin phone number
- Share screen and display the Introduction Slide- Zoom for Healthcare.
- Admit all and welcome all patients into the call
- Read the Script for Provider- Zoom for Healthcare
- Review any additional guidelines you may want share with your group before you begin the session (i.e. session guidelines, goals, expectations, etc.)
- Put "spotlight" on the primary facilitator
- Mute all participants
- Screen share and present education materials
- Main Host clicks "End Meeting For All"

**Prepare to use the security button to quickly lock the meeting, send participants into the waiting room or remove participants from the call.*