

# Introduction to URMC Zoom and Telemedicine

MEDICINE *of* THE HIGHEST ORDER



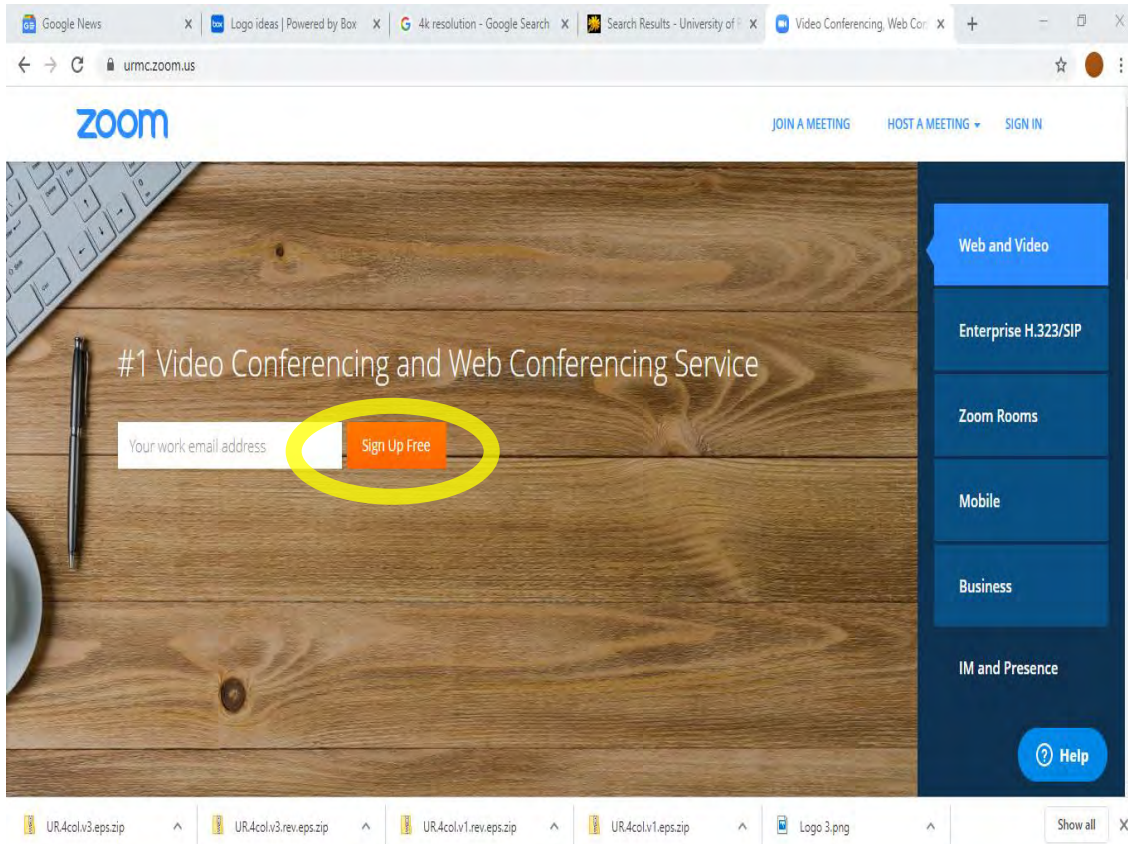
# Setting up a URM Zoom Account

# URMC Zoom Account



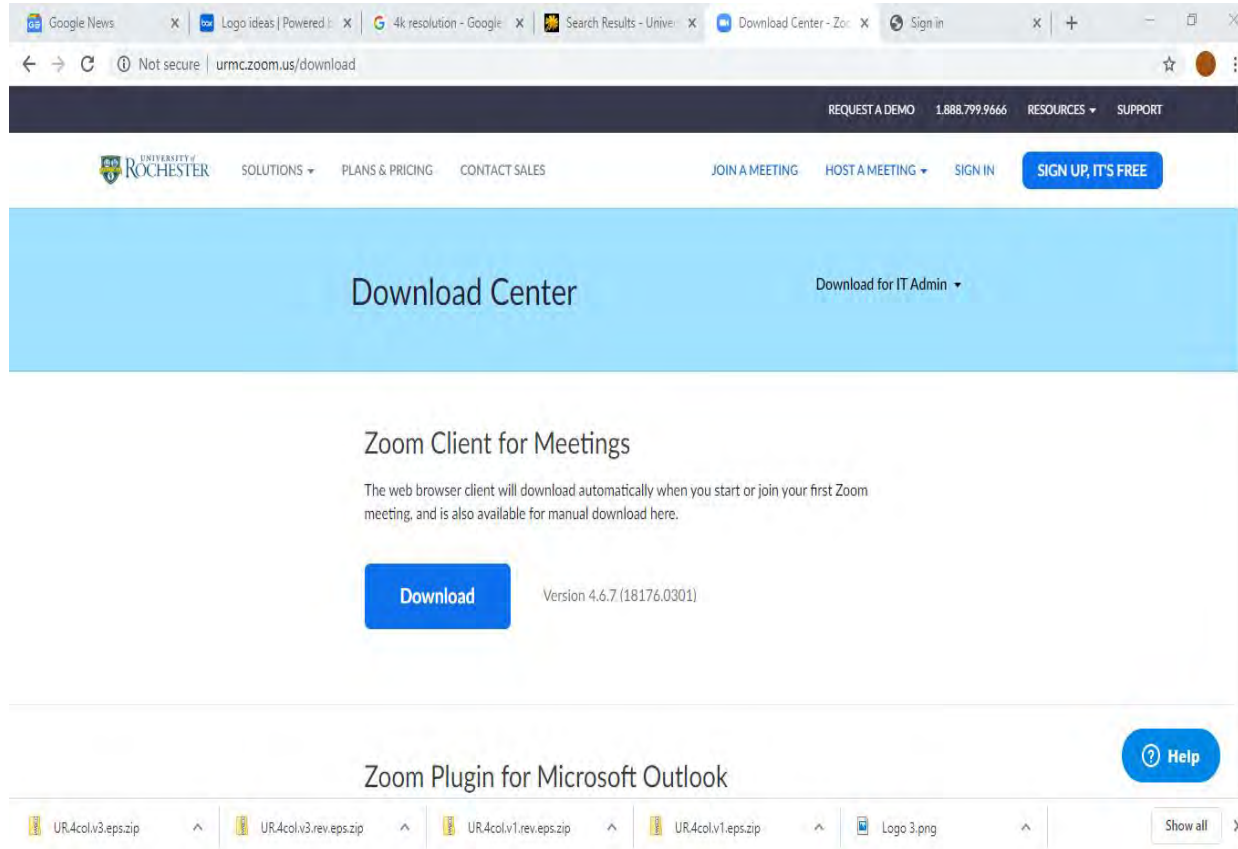
Both the URMC clinician providing the video consults to patients and the person (i.e. OAS) doing the scheduling **MUST** have a URMC Zoom Account

# Sign up for URMC Zoom Account



- Open <https://urmc.zoom.us> in a web browser.
- Type your full URMC email address in the white box and click the orange **Sign Up Free** button.
- Follow all instructions. It will ask you to verify your email address, so you will need access to your email to complete the sign up process.

# Download Zoom Client



- Normally Zoom will install the first time you click on a zoom meeting link
- If you are hosting a meeting and don't have the zoom client installed, open <https://zoom.us/download> in your web browser and download the meeting client for your computer

# Signing into Zoom - SSO

Zoom Cloud Meetings


## Sign In


Enter your email


Enter your password [Forgot?](#)

Keep me signed in [Sign In](#)

or

 [Sign In with SSO](#)

 [Sign In with Google](#)

 [Sign In with Facebook](#)

[< Back](#) [Sign Up Free](#)

- Sign into your URMC Zoom account using the “Sign in with SSO” button.
- Do not be tempted to enter your email address here.



# Sign into Zoom – URMC Domain

Zoom Cloud Meetings

## Sign In with SSO

Company Domain

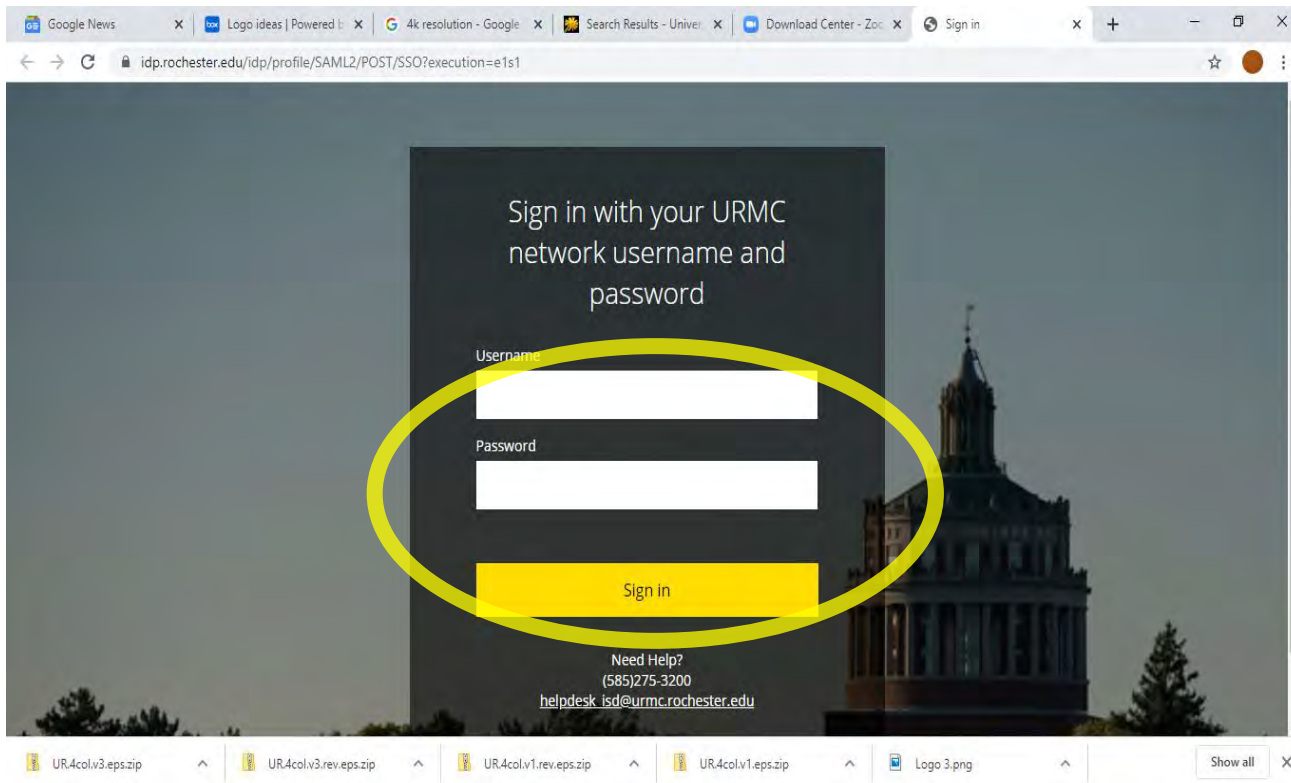
urmc .zoom.us

[I do not know the company domain](#) **Continue**

< Back

- The next dialog will ask you to enter your domain. It is always **“URMC”**
- You should only have to do this once because it will remember for your next login.

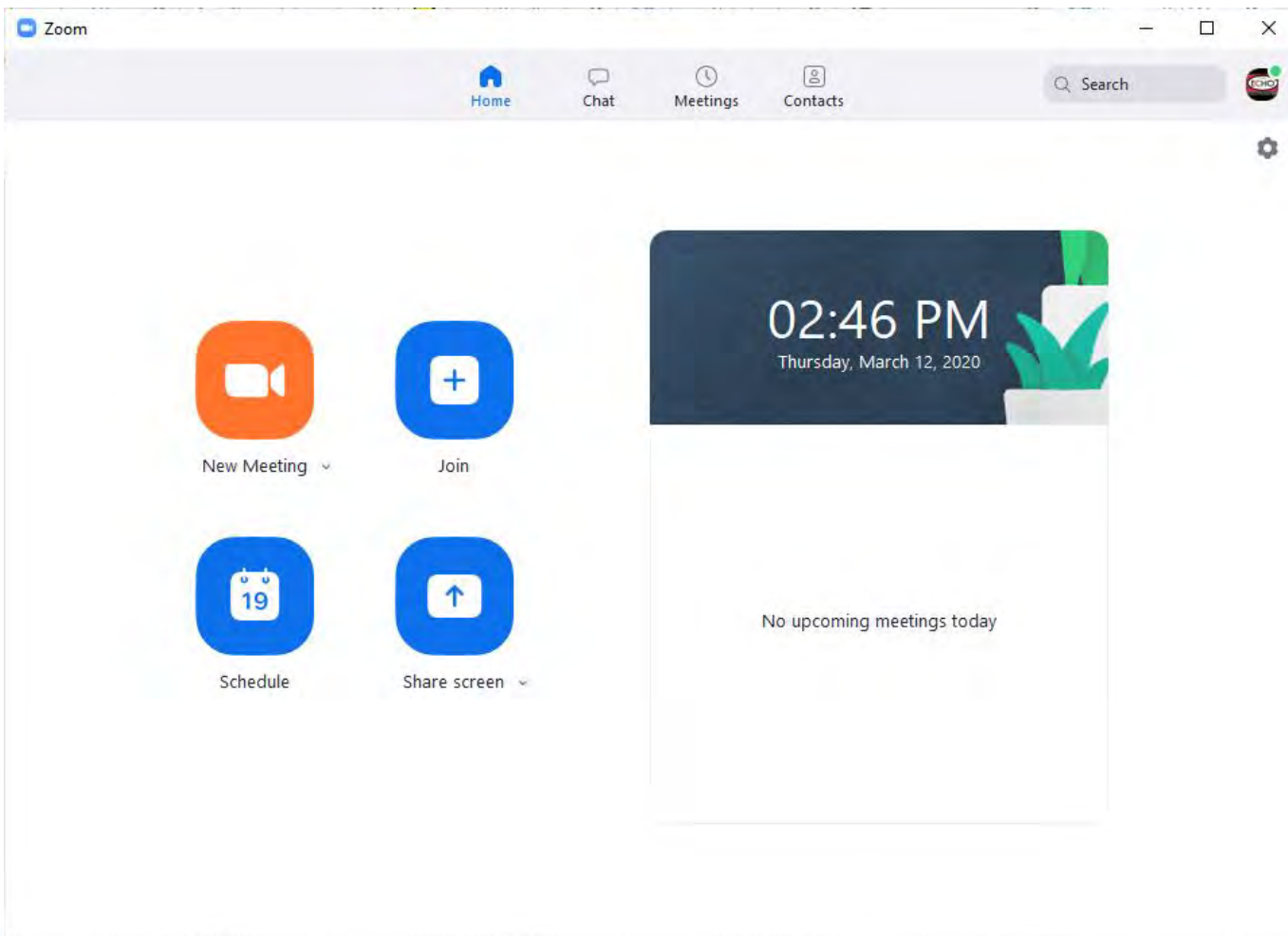
# Sign into Zoom – URM C Sign-in Page



- Next, the Zoom app will open the URM C domain sign-in page in your web browser.
- Enter your URM C domain username and password, then click the **Sign In** button.



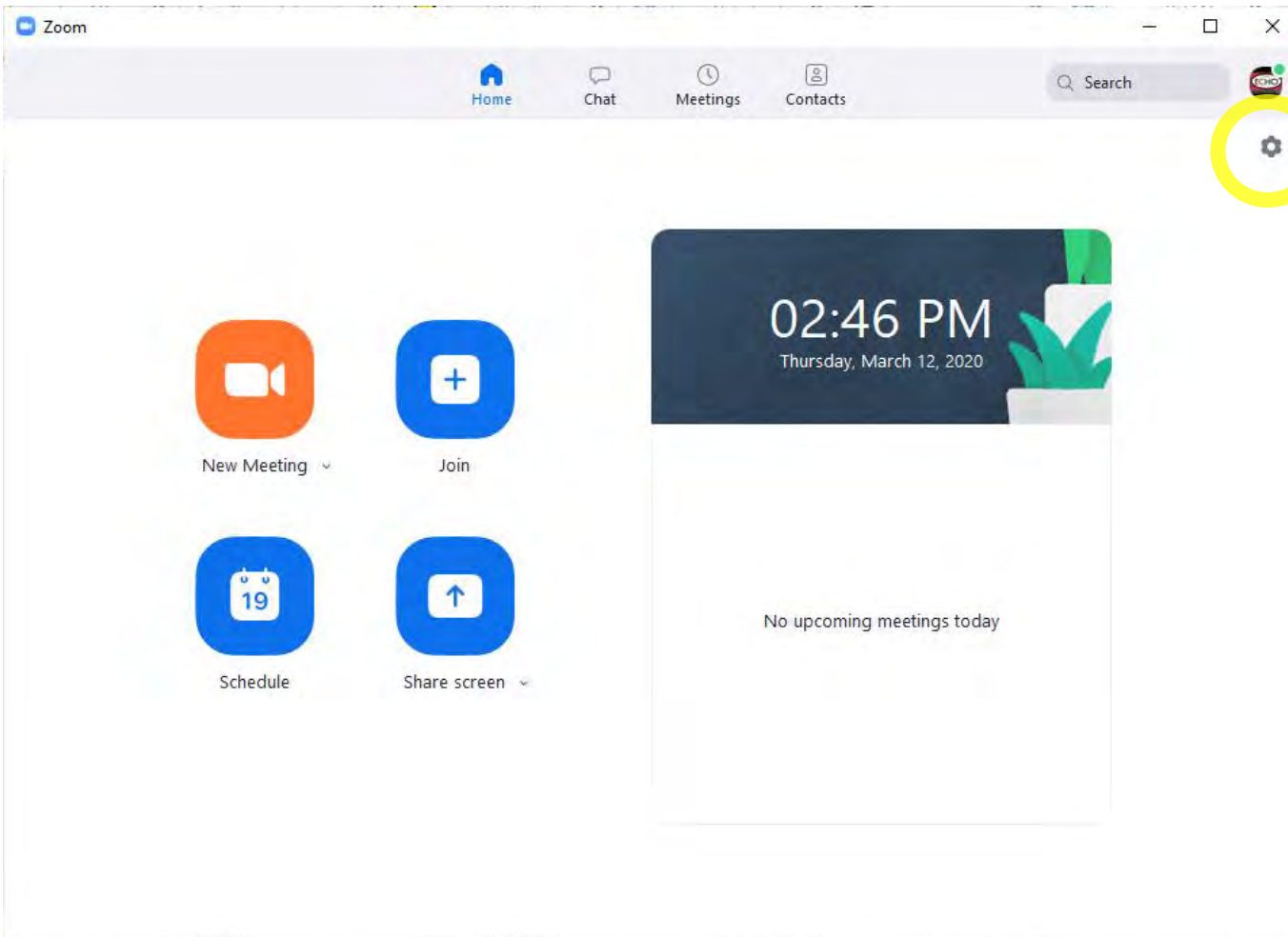
# Zoom App Main Screen



- You are now signed into your URMC Zoom account, where you can see all of your scheduled meetings, join other meetings and create new ones.

# Assigning Zoom Meeting Scheduling Privileges

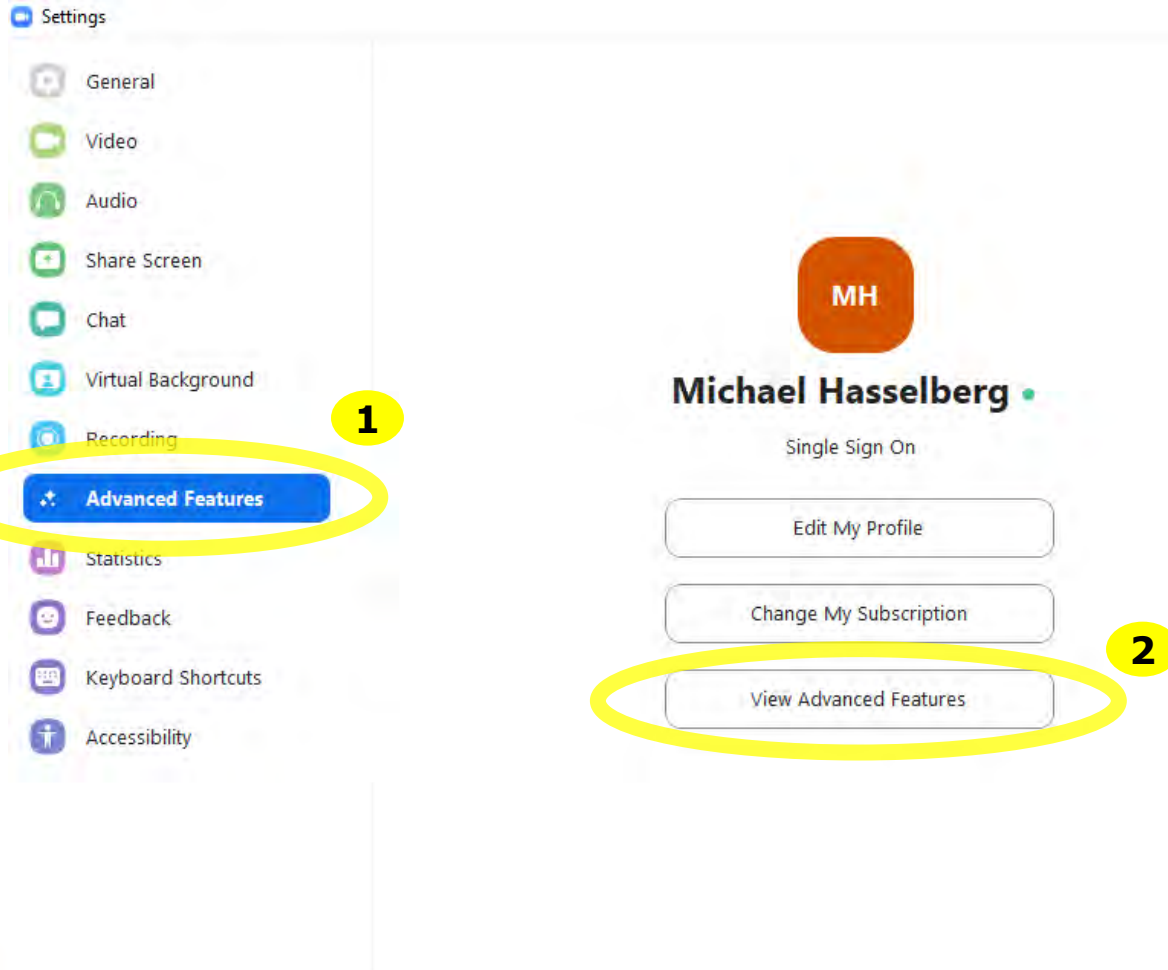
# Assigning Scheduling Privileges



- Click on the settings icon



# Zoom Settings Screen



1. Click on **Advanced Features** tab on left hand column
2. Then click on **View Advanced Features**

# Sign into Zoom – URM C Sign-in Page

Sign in with your URM C network username and password

Username

Password

Sign in

Need Help?  
(585)275-3200  
helpdesk\_isd@urmc.rochester.edu

- Next, the Zoom app will again open the URM C domain sign-in page in your web browser.
- Enter your URM C domain username and password, then click the “Sign In” button.

# My Settings - Zoom

The screenshot shows the Zoom 'My Settings' interface. On the left sidebar, the 'Settings' option is highlighted with a yellow circle and a '1' next to it. On the right side of the page, a vertical scroll bar is visible, with a yellow arrow pointing to it and a '2' next to it. The main content area shows the 'Meeting' tab selected, with sub-tabs for 'Recording' and 'Telephone'. The 'Meeting' sub-tab is active, showing options like 'Schedule Meeting', 'In Meeting (Basic)', 'In Meeting (Advanced)', 'Email Notification', and 'Other'. Below these are sections for 'Host video', 'Participants video', and 'Audio Type'.

1. Make sure you are in the **Settings** tab
2. Scroll the web page to the bottom



# My Settings - Zoom

The screenshot shows the Zoom 'My Settings' interface. On the left, a sidebar lists settings categories: 'Schedule Meeting', 'In Meeting (Basic)', 'In Meeting (Advanced)', 'Email Notification', and 'Other'. The 'Schedule Meeting' section is active, showing 'Invitation Email' settings with a language dropdown set to 'English' and a 'Send me a preview email' link. Below this, the 'Schedule Privilege' section is highlighted with a yellow circle. It contains a description of scheduling privileges and a dropdown menu labeled 'Assign scheduling privilege to' with a plus sign icon. A yellow arrow points from the right side of the slide to this plus sign icon. Below the dropdown, it shows 'No one' for both 'Assign scheduling privilege to' and 'I can schedule for'. At the bottom, there is an 'Integration Authentication' section with a key and a 'Help' button.

- Go to **Schedule Privilege**
- Click on the **+** icon under **Assign scheduling privilege to**

# Assign Scheduling Privilege Pop up

## Assign scheduling privilege

Enter the email addresses of those who can schedule meetings on your behalf. Use a comma to separate multiple email addresses.



- Enter the urmc email address of the person or persons that schedules your patients
- Once email address is entered, click on the **Assign** button

# Starting the Zoom Session

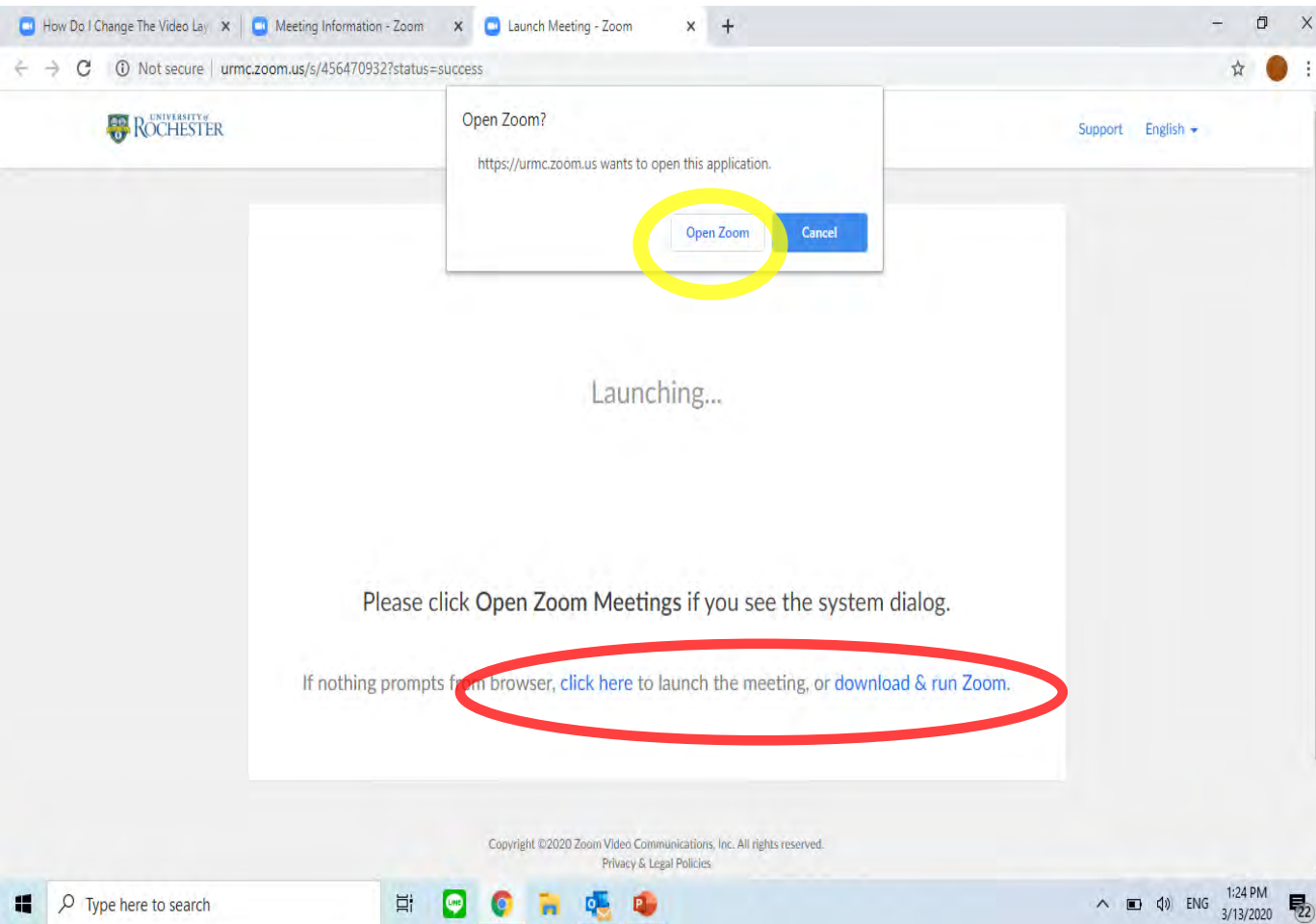
# Open Zoom Link

Example of a zoom link:

<https://urmc.zoom.us/j/456470932>

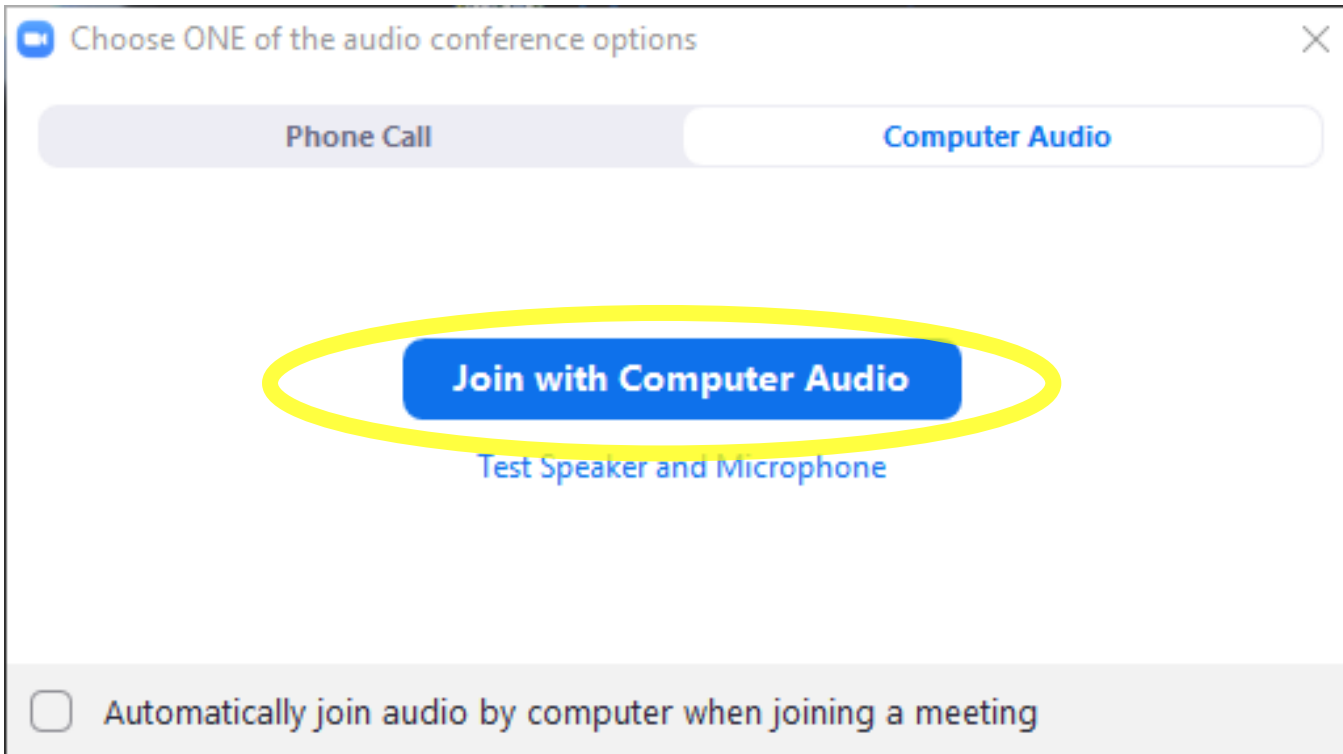
- Click on the unique zoom link for the patient session
- Zoom link will be found in your outlook calendar
- Zoom link will also be found within your scheduled patient encounter within Epic

# Open Zoom App from the Browser



- Click on **Open Zoom** to open link with Zoom app
- If Zoom does not open use the links circled in red to open or download the Zoom app

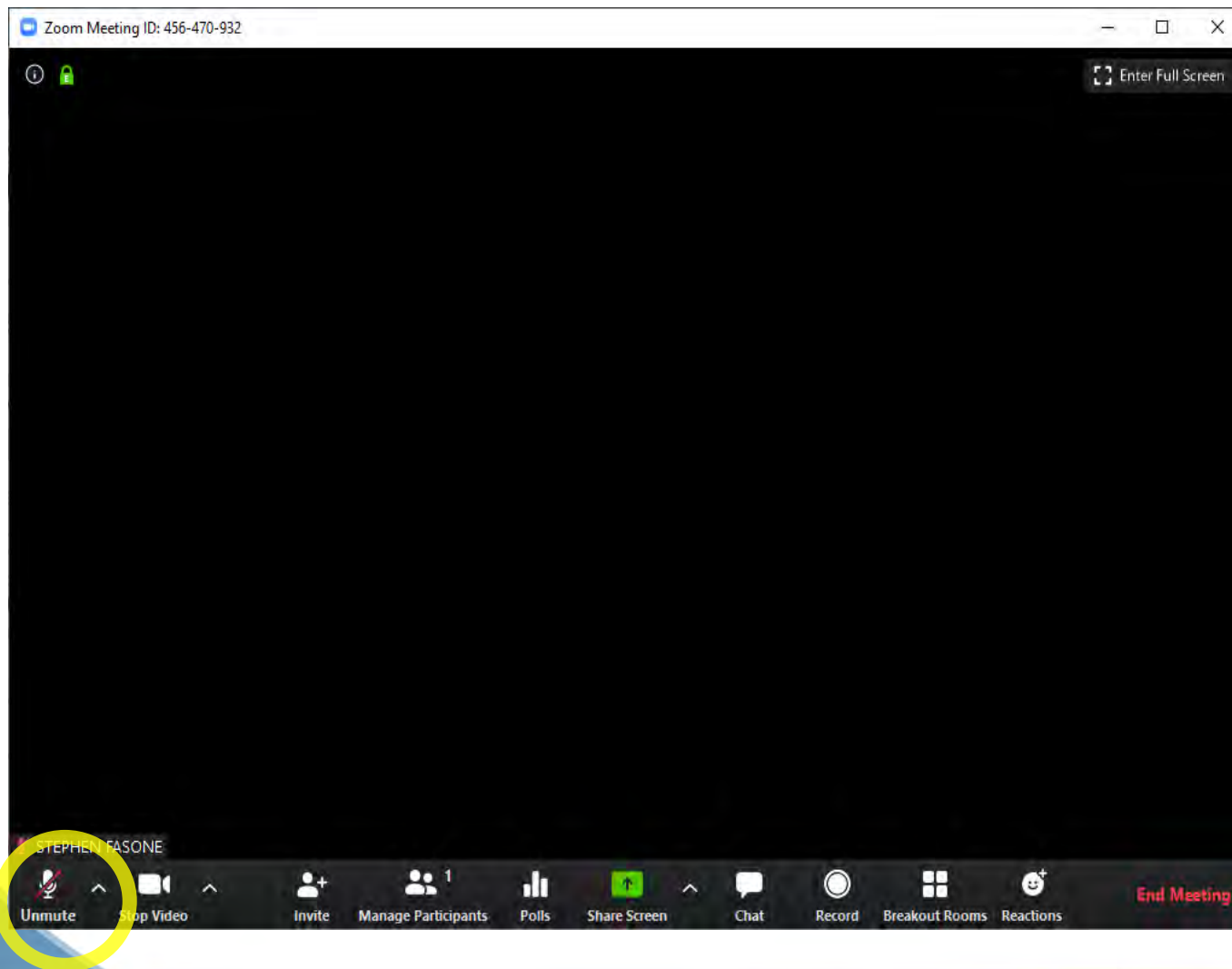
# Connect to Computer Audio



- Click on **Join with Computer Audio** button to use your computer microphone and speakers

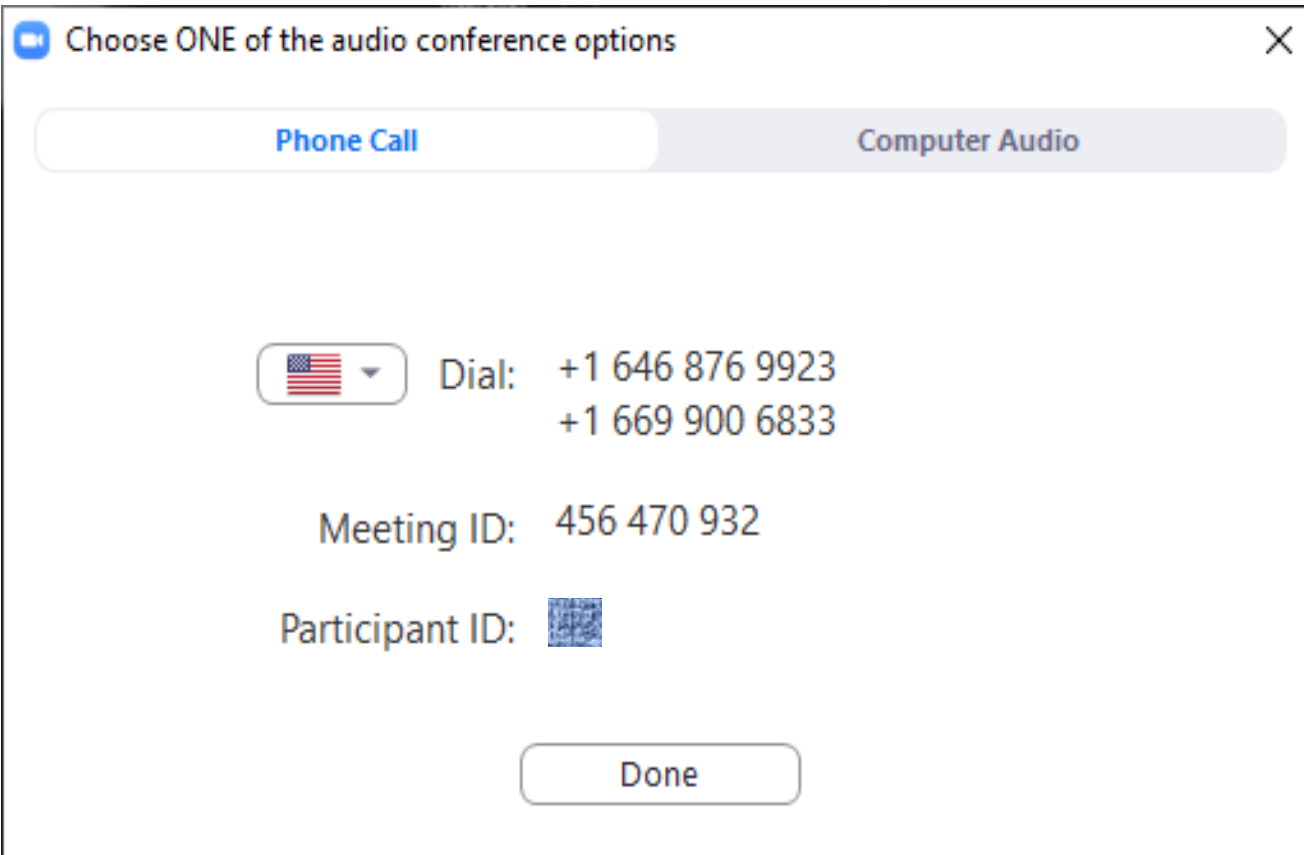


# Confirm that Audio is Connected



- Microphone icon will be visible in the lower left corner of the Zoom menu when audio is connected
- This is also the button that you would use to mute or unmute your microphone

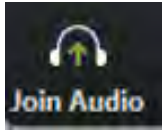
# No Computer Microphone? Connect Audio with Telephone

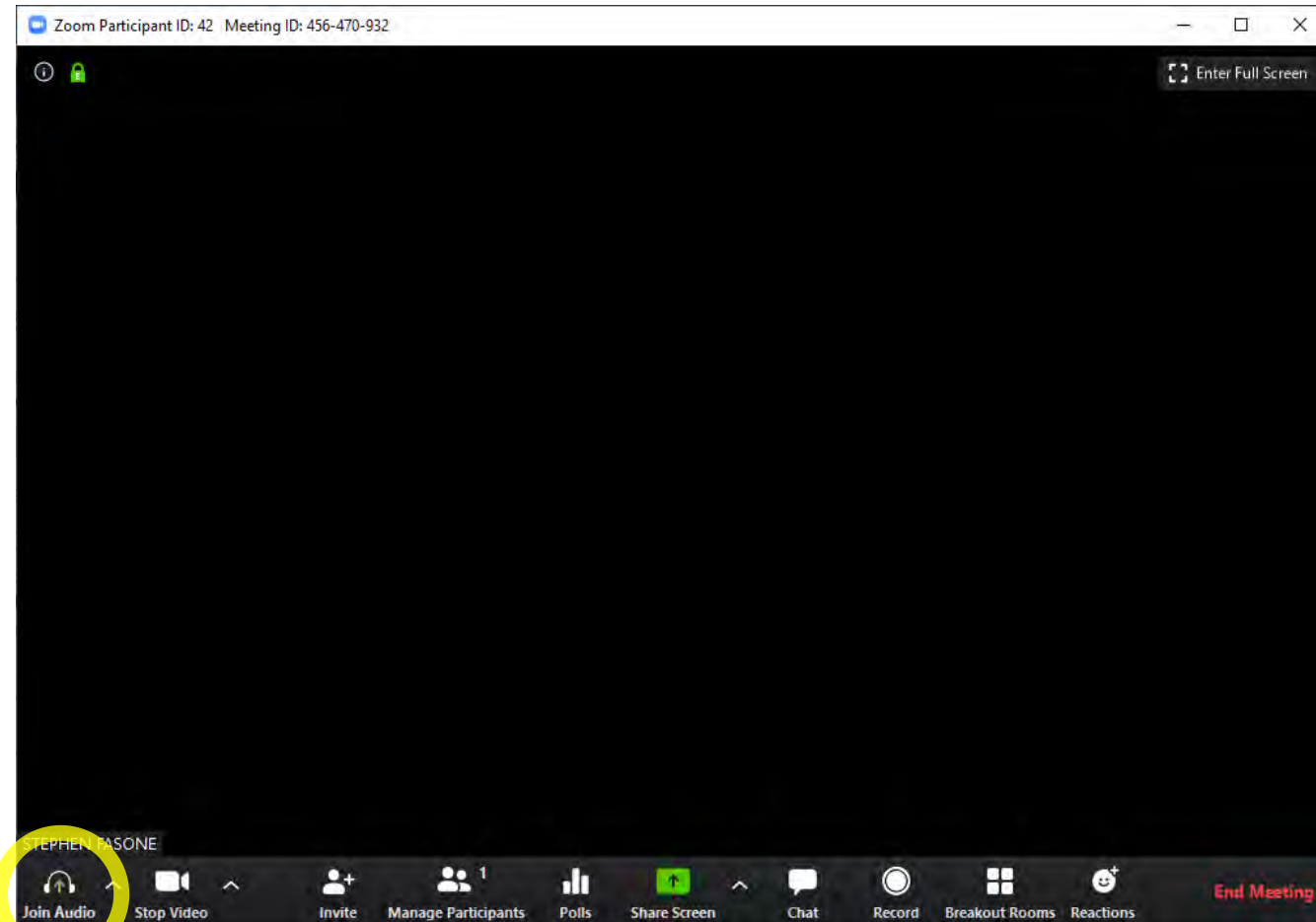


The screenshot shows a Zoom dialog box titled "Choose ONE of the audio conference options". It has two tabs: "Phone Call" (selected) and "Computer Audio". Below the tabs, there is a dropdown menu for the country, currently set to "United States" (indicated by a US flag icon). To the right of the dropdown, the text "Dial:" is followed by two phone numbers: "+1 646 876 9923" and "+1 669 900 6833". Below the dialing information, the text "Meeting ID:" is followed by the number "456 470 932". Below the meeting ID, the text "Participant ID:" is followed by a QR code. At the bottom of the dialog box, there is a "Done" button.

- Dial one of the phone numbers to join the meeting
- Enter the meeting ID
- Enter the participant ID shown on the screen followed by #

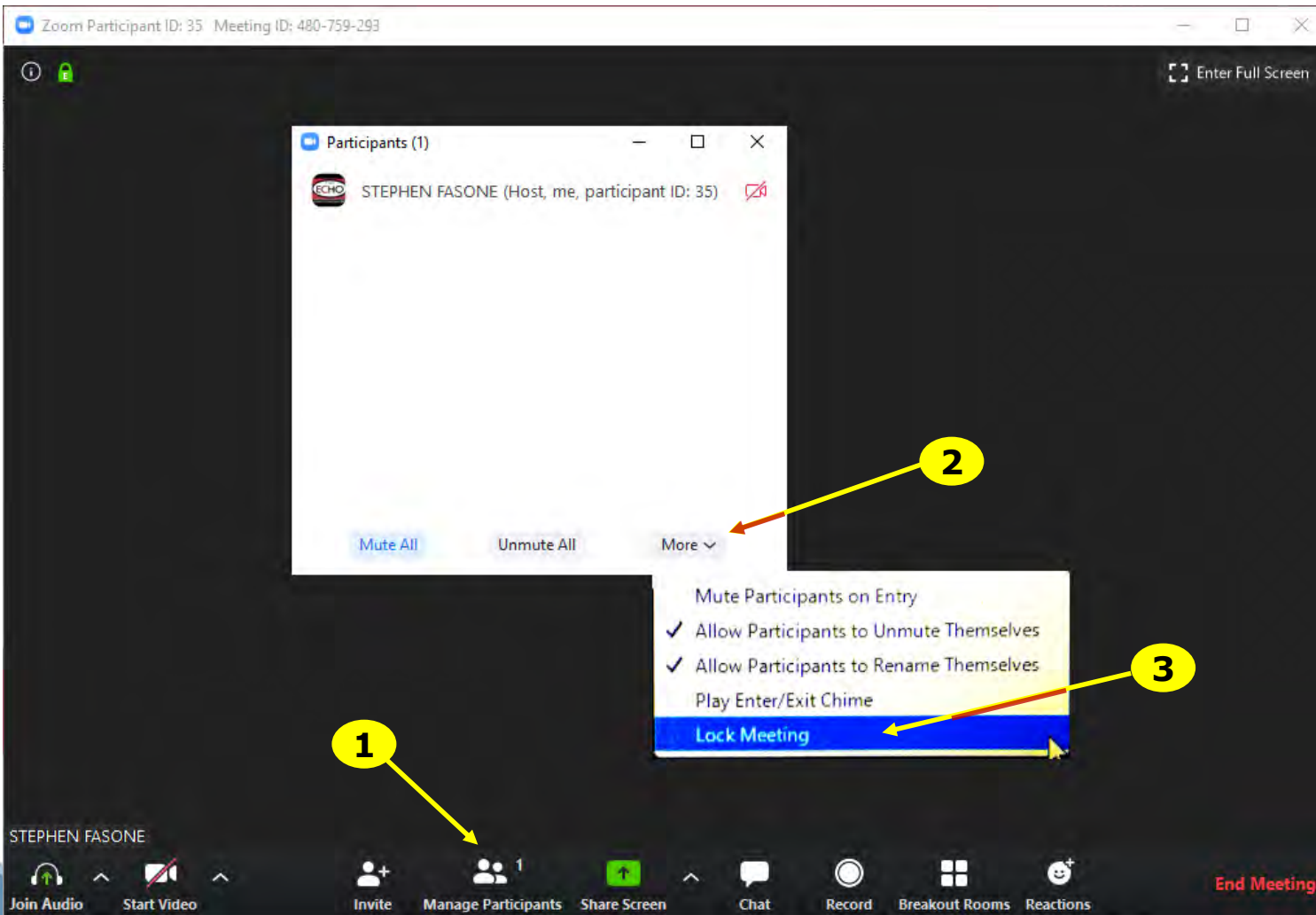
# Computer Audio Problems

- If you cannot hear any sound, check the icon in the lower left corner
- If the icon looks like this  click on it
- If audio is already joined, check the volume setting on your computer
- If trouble continues, join by phone



# Locking the Zoom Session for HIPAA Compliance

# Lock the Zoom Session



1. Open participants window by clicking **Manage Participants** in the menu
2. Click **More** at the bottom right of Participants window
3. Click **Lock Meeting**

# Telemedicine Basics



# Identify Patients for Telemedicine Services

## **Patients who are:**

- Fearful of coming into a clinic/public setting
- Experiencing signs and symptoms of illness
- Have a condition in which a video evaluation will likely change management

## **Consider patients ability to engage:**

- Understand cultural, linguistic, socioeconomic, and other individual characteristics (i.e. medical status, psychiatric stability, cognitive impairment, personal preferences)

## **Confirm patient has necessary equipment:**

- Smartphone or tablet
- Computer with camera and microphone
- Access to Internet connection

# Know Your Back Up Plan

## **Make reasonable effort to:**

- Identify and learn how to access relevant and appropriate emergency resources in the patient's local area
- Have patient's telephone contact information
- If possible identify patient's emergency contacts

## **Be prepared with a plan on what to do in an emergency**

- i.e. suicide risk

## **Have procedures in place for technology failure**

- Call the patient or caregiver on the telephone

*Note: Patient's telephone number should be included with scheduling information*

# Ensuring Privacy and Safety

## **Clinician site:**

- Secure clinical room to prevent interruptions
- Consider sign on door “Telehealth Session in Progress”
- Consider using white noise makers in doorways

## **Assessing the patient site:**

- Consider the patient’s situation within the home
- Availability of emergency, technical, or personnel supports
- Minimize risk of distractions

## **Reassure the patient:**

- Not being recorded
- Data is being transmitted over secure private networks

# Preparing the Clinician Room

- Dress appropriately and keep clothing simple
  - Consider avoiding wearing stripes
- Ensure that any visible surroundings are tidy, and clear of clutter or other items that your patients should not see

# Lighting Should be Optimized

- Use full-spectrum incandescent or daylight from a window over fluorescent lighting when possible
- Light source should fall on the face from the front to minimize shadows
- Ideally there **should not** be a light or a window in the background and backgrounds should not be bright white
- Consider use of shades or curtains when available

# Noise Should be Limited


- Know how to mute and unmute your microphone
- Check your equipment volume levels
- There should be no need to shout
- Avoid extraneous noises (fans, lights, shuffling of paper, side conversations)



# Obtaining Informed Consent

**HIGHLAND HOSPITAL  
STRONG MEMORIAL HOSPITAL**

**TELEHEALTH CONSENT**  
**SH 419TELE MR**



\*419\*

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This consent is for all telehealth services provided for the following condition(s) \_\_\_\_\_.

1. I understand that my health care provider wishes me to engage in a telehealth appointment/consultation to evaluate my health condition.
2. My health care provider has explained to me that either video conferencing technology and/or electronic transmission of my health information such as radiologic images, photos and sounds will be used during this appointment/consultation and it will not be the same as a direct patient/health care provider visit due to the fact that I will not be in the same room as my health care provider.
3. I understand that there are risks associated with use of this technology such as interruptions, technical difficulties, and inability to obtain information sufficient for decision making about my health problem and that all possible precautions will be taken to minimize these risks. In addition, my health care provider or I can discontinue the telehealth visit if it is felt that the information obtained through the telemedicine connection is not adequate for diagnostic decision-making or for implementing management of my health problem. In that event, we will endeavor to facilitate access to a site where adequate care can be provided, such as a doctor's office or other source of in-person care.
4. I understand that my healthcare information may be shared with other individuals for scheduling and billing purposes. Others may also be present during the consultation other than my health care provider and consulting health care provider in order to operate the video equipment. The above mentioned people will all maintain confidentiality of the information obtained. I further understand that I will be informed of their presence in the appointment/consultation and thus will have the right to request the following:
  - (a) Omitting specific details of my medical history/physical examination that are personally sensitive.
  - (b) Asking non-medical personnel to leave the telemedicine examination room; and/or
  - (c) Terminating the consultation at any time.
5. The alternatives to a telehealth appointment/consultation have been explained to me. In choosing to participate in a telehealth appointment/consultation, I understand that some parts of the exam involving physical tests may be conducted by individuals at my location at the direction of the consulting health care provider.
6. In an emergent consultation, I understand that the responsibility of the telemedicine consulting specialist is to advise my local practitioner and that the specialist's responsibility will conclude upon the termination of the video conference connection.
7. I understand that billing may occur from both my health care provider and the facility I am presenting at for my appointment.
8. I have had a direct conversation with my health care provider, during which I had the opportunity to ask questions in regard to this procedure. My questions have been answered and the risks, benefits and any practical alternatives have been discussed with me in a language in which I understand.

**By signing this form, I certify that:**

- I have read or had this form read and/or had this form explained to me.
- I fully understand its contents including the risks and benefits of the telehealth appointment/consultation.
- I have been given ample opportunity to ask questions and that all questions have been answered to my satisfaction.
- I consent to this telehealth appointment/consultation.
- I have been provided with the University of Rochester Medical Center and Affiliates Notice of Privacy Practices.

Patient/Parent/Guardian Signature	Date	Time
<b>TO BE COMPLETED BY STAFF</b> No signature was obtained due to: <ul style="list-style-type: none"> <li><input type="radio"/> Impractical, verbal consent given</li> <li><input type="radio"/> Patient's condition/capacity</li> <li><input type="radio"/> No representative</li> </ul>		
Staff Signature	Date	Time

419TELE (Rev 3/15)

- Informed consent can be obtained verbally by the scheduler
  - Refer to scheduling script with consent disclaimer
- Scheduler will check appropriate boxes on SH 419TELE MR Telehealth Consent form if verbal consent is obtained
- Consent form can also be sent to the patient via MyChart
- This form should be scanned into Epic and filed under the Media Tab

# At the Start of the Session

- Provide the patient with an orientation
- Describe what will happen during the session
- Explain to the patient that their privacy will be protected
- Ensure the patient that they can decline the telemedicine session at anytime
- Review back up procedures in case of technology failure

# At the End of the Session

- Review your assessment, electronic prescriptions, any future orders, and instructions with the patient
  - Verify the patient's understanding of these materials
- Inform the patient that written instructions may be found on the patient portal (MyChart)
  - If patient is not on MyChart, consider mailing the patient instructions

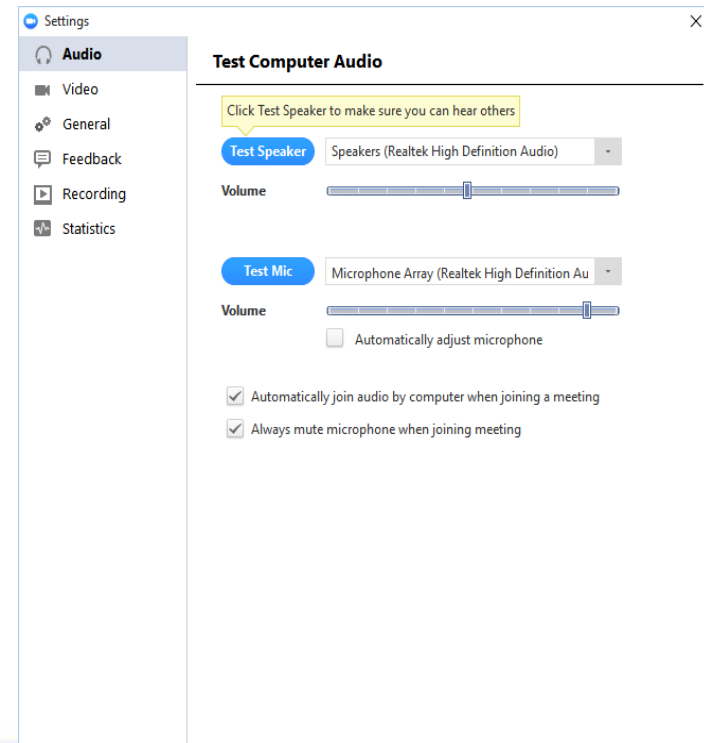
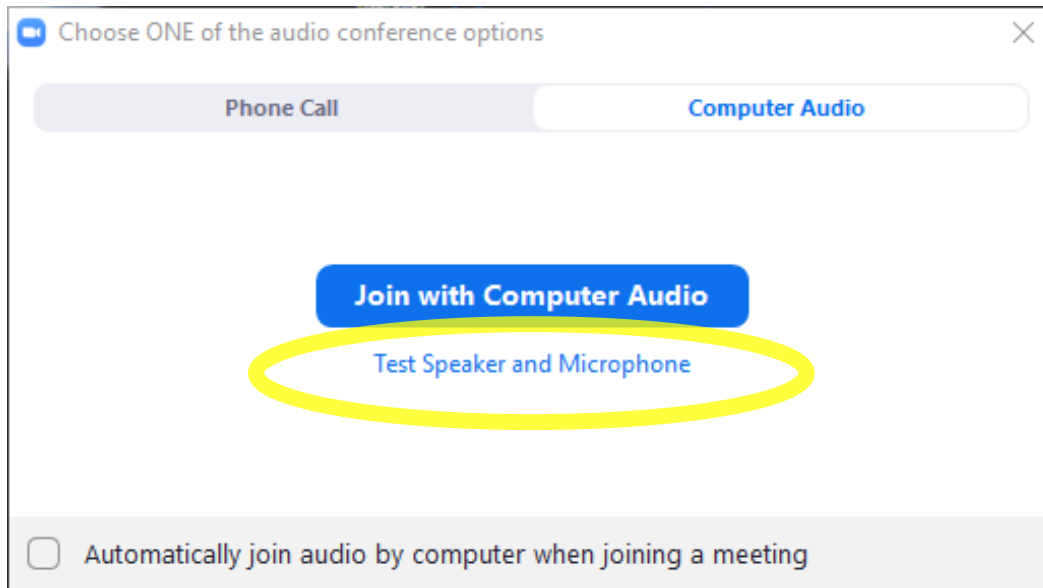
# Videoconference Etiquette

- Face your camera
- Introduce yourself before talking
- Avoid making distracting sounds
- Speak in appropriate tone and cadence to accommodate any audio or video delay
- Engage your patient in conversation and inform them if you need to look away from the camera


# Audio and Video Problem Troubleshooting

# Zoom Practice

- Consider testing your audio within settings
- Consider practicing a zoom session with colleagues, friends, or family before first patient encounter



# Troubleshooting Video Problems

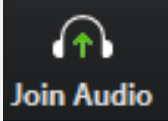
Issue	Cause	Fix
No Video	Camera turned off	Click on the camera icon to turn the image on. 
No Video	If you see a totally black image, the camera lens may be covered	Remove any obstructions, including a lens cover, from the camera.



# Troubleshooting Audio Problems

Issue	Cause	Fix
Echo or Feedback	More than one device in the room is connected to the same meeting	Go to Audio Options screen on all of the computers except the one you want to use and click "Leave Computer Audio".
Echo or Feedback	Phone and computer audio are on at the same time	Key in # <Participant ID> # on the phone to disconnect the iPad's audio, or go to Audio Options screen on the iPad and click "Leave Computer Audio"

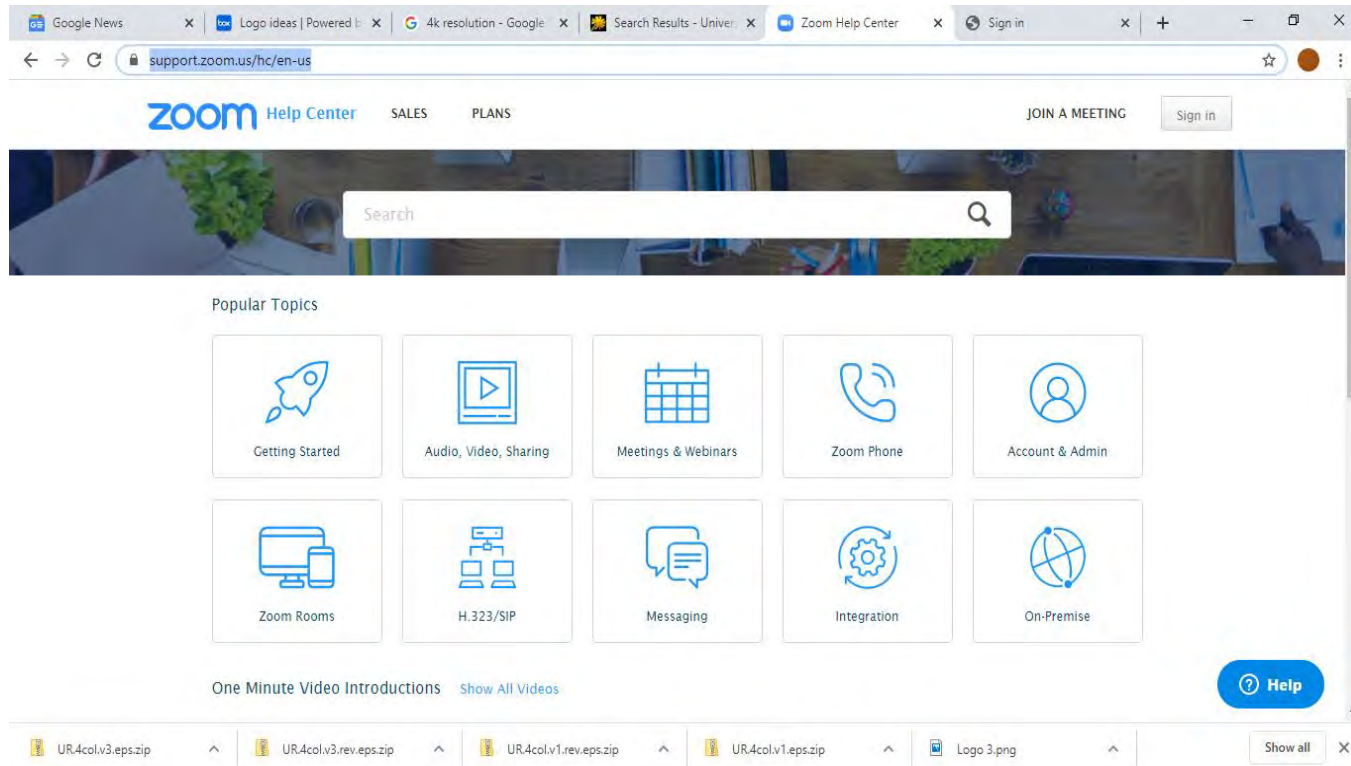
# Troubleshooting Audio Problems

Issue	Cause	Fix
Patient cannot hear you	Computer microphone is muted, or volume is down low	Click on the mic icon in the Zoom app on the iPad to unmute the microphone 
Patient can hear you but report excessive noise or low volume	Too much ambient noise in your room	Turn off noise-producing equipment, such as the air conditioner. Try not to shuffle papers and limit talking to one person at a time

# Troubleshooting Audio Problems

Issue	Cause	Fix
You cannot hear the patient	Computer volume is too low or speakers are muted	Go to Audio Options->Test Computer Audio, verify that the correct speakers are selected and increase speaker volume.
You cannot hear the patient	Patients device microphone is set too low	Ask the patient to adjust their microphone volume

# Zoom Help Center



- If you need help using Zoom, the Zoom Help Center has extensive tutorials and videos.
- Go to <https://support.zoom.us/hc/en-us> for more information.