# Zoom Clinical Group Sessions

## Purpose

This document will provide healthcare providers with unique considerations for facilitating virtual clinical group sessions (e.g., educational session, group therapy, etc.) using AHS Zoom.

## Facilitator Preparation Prior to the Session
### Understand the Features of your Zoom Basic Account

- Enables up to 200 participants to meet for a 40 minute duration.
- For longer sessions, schedule back-to-back meetings or instruct participants to re-join using the same meeting link when the time limit is reached. Consider incorporating a break at this time.
- If the session workflow cannot be accommodated using the Zoom Basic account, refer to the Virtual Health webpage on Insite for information about Zoom Advanced accounts.
- In advance of the session, take time to practice using Zoom and consider doing a trial.
- Be familiar with Zoom host and co-host controls for access to meeting features.
- Consider the unique objectives for every group session and adjust Zoom meeting settings accordingly, including:
  - Enable waiting room
  - Enable join from browser
  - Rename participants
  - Mute/unmute all
  - Remove participants
  - Speaker/gallery view
  - Enable/disable screen sharing
  - Enable/disable chat box
  - Enable/disable whiteboard and annotations
  - Enable/disable breakout rooms
  - Disable virtual background
  - Lock meeting

    *Additional settings are available with the Zoom Advanced account*

## Prepare Participants in Advance

- Use the *Virtual Health - Zoom Screening Tool*\* to help identify participant eligibility.
- Discuss participant expectations during the session, including confidentiality and respect for others. Inform participants to attend from a private location and not to record the session.
- Provide participants with the following information:
  - *Virtual Health Zoom - Patient Support Document\*.*
  - Program resources (e.g. contact person, session handouts, etc.).
  - What to do if they experience technical issues (e.g., option to join by phone).
  - The programs' established downtime procedure, in the event the facilitator experiences technical issues during the session.
- Confirm how the participant would like to receive the Zoom meeting link (e.g., email, telephone) and never include any identifiable health, personal or business related information in an email without encryption, as per AHS Policy #1113 Transmission of Information by Facsimile or Electronic Mail.

### Verbal Agreement from the Participant to Proceed using Technology:

- A participant's **verbal agreement to the use of technology** must be obtained to proceed with a virtual visit or group session. Participants should be informed of the limitations, unique privacy risks (e.g., other participants' family/friends listening in, or someone recording the session without their knowledge) and alternate options for attending a virtual group session. Clinicians should document

within the legal record of care and confirm whether there are additional professional obligations imposed by their regulatory authority.

- AHS and professional regulatory bodies have policies and published standards about informed consent to health care interventions that must be adhered to, independent of the mode of encounter. Virtual health care decision-making is not exempt from the AHS Consent to Treatment/Procedures(s) Policy #PRR-01.

### Verification of Participant Identity:  AHS Patient Identification Policy #PS-06

- Follow pre-established department procedures to determine if participant identity verification is required, and inform participants to come prepared to provide the required information.
  - o Examples of virtual strategies:  limit attendance to known participants only, pre-assign participant registration codes for sign-in into the session, request participants join using their first name or initials, use the waiting room and breakout rooms to confirm identity with each participant separately prior to admitting them into the session, etc.
- Refer to the *Virtual Health Recommendation - Provider and Patient Identity Verification\*.*

## Schedule the Zoom Clinical Group Session

- Refer to the *Virtual Health resource - Schedule/Join a Zoom Meeting\*.*
- Adjust the Zoom meeting settings to accommodate the specific needs of the group session.
- To ensure the group session is private and secure:
  - o Use the waiting room to ensure only registered participants are admitted (monitor for late attendees and those joining by telephone).
  - o Disable the virtual background to help confirm only registered participants are joining.
  - o Avoid advertising the Zoom meeting link publically. Pre-registration for meetings are available. For more information on registration set-up and managing participants visit the Zoom Support Page.
- **Important:**  When emailing Zoom meeting details to a group of participants, copy and paste the meeting invite information into a NEW email and use the Bcc function to email all participants without sharing their personal email addresses.

## Day of the Session

- If sharing your screen, ensure non-related records, programs and files are closed prior to initiating the session (e.g., close Outlook, Skype for Business, etc.).
- Join early to confirm meeting settings and ensure all required content is open and ready to present.
- Follow AHS Policy #PS-06 and pre-established department procedures for verifying participant identification (if required).
- If using the waiting room, admit registered participants including those joining by phone, and monitor for late attendees.
- Once all attendees have joined the session, lock the meeting to prevent anyone else from joining. Once a meeting is locked no one else can join the meeting and the host will not be alerted if anyone tries to join.
- Introduce yourself using NOD (Name, Occupation, Duty).

- Review participant expectations, virtual meeting features and provide an overview of the virtual session processes and schedule (e.g., how and when to ask questions, etc.).
- Conduct the session and end the meeting upon completion.
- Follow existing in-person documentation requirements for attending the session (if required). Refer to AHS Clinical Documentation Process Directive #1173-01 and Records Management Policy #1133.

**Resources:**  * All referenced Virtual Health resources, and more, can be obtained on the AHS Virtual Health Insite webpage: https://insite.albertahealthservices.ca/it/Page1119.aspx