Zoom Settings for Clinical Group Sessions

The purpose of this document is to highlight AHS Zoom settings and features to consider when scheduling a virtual clinical group session. Settings can be accessed and changed within your AHS Zoom account settings, whereas the features can be changed during the meeting. The settings and features selected should reflect the unique nature and privacy requirements for each group session. The settings and features listed below are options that may not apply to every group session.

Setting/Feature	Clinical Rationale
Registration feature	*Requires an advanced account* to allow participants to register in advance and add to their personal Outlook calendar. This feature is only available when scheduling a meeting using the Zoom Web Portal. When requesting patients to register for a Zoom appointment, please limit collection of identifiable health information to their first name, last name, and/or email address. This complies with AHS Zoom privacy requirements.
Alternative host	Both the person scheduling and the person assigned *require an advanced account.* The scheduler can assign host controls to another advanced account user. The alternative host can start the meeting as the host.
Participant's video	Disabling this feature will prevent a participant's video from displaying at the start of the meeting. Participants can change this during the meeting.
Mute participants upon entry	Enables the host to control whether participants can unmute themselves.
Private chat	Disabling 'private chat' prevents participants from having conversations amongst themselves. If disabled, chat messages will be displayed to all participants.
Play sound when participants join or leave	If selecting host only, a sound will alert only the host(s) that there has been a change in attendance, prompting them to review the waiting room and admit late participants.
Co-host(s)	Allows the host to share hosting privileges with another participant who gains access to co-host controls.
Polling	*Requires an advanced account.* 'Polls' are added to the meeting controls. It allows the host to survey the attendees.
Screen sharing	The host can enable or disable the ability for participants to share their screen during the session. The host can share their screen with participants.
Annotations	Disabling this feature prevents participants from writing on the screen or whiteboard during a session. The session may or may not require participants' interaction.
Whiteboard	A digital 'whiteboard' can be used for notes, drawing, and participants making annotations. This can be saved for future reference.

Hide participant profile picture	Zoom users may have a personal profile picture that is displayed when their video is off. This setting prevents participants from enabling their profile picture for others to see.
Breakout room*	A breakout room allows the meeting host to divide meeting participants into smaller groups to facilitate group interaction, at any time during the session. A host may also use this space to verify participant identities, one at a time, and/or change a participant's name (if required) at the beginning of the session. An *advanced account user* can schedule breakout rooms and assign participants prior to the session starting, whereas a basic account user needs to create the breakout room during the meeting session.
Virtual background	A 'virtual background' displays an image behind the individual's video. Virtual Health recommends disabling this feature, as it can be a distraction and can have privacy implications by hiding additional attendees from view.
Waiting room	A virtual 'gathering place' for participants to wait until the host admits them into the session. Participants cannot interact in the waiting room. It offers a space for the meeting host to individually verify participant identity and/or change a participant's name (if required). Additionally, the host can send a message to the participants in the waiting room.
Join from your browser	Allows participants to join directly from an internet browser (if they haven't installed the Zoom application).
Lock the Meeting*	Once the meeting has started, the host may lock the meeting to prevent additional people from attending.

* Feature can only be selected when the session begins.
Refer to Zoom Meeting Settings for more information.

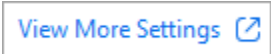## Webinar

A Zoom webinar is a view-only platform where the attendees cannot share audio or video, but have the ability to interact with panelists via Q&A, chat, and answering polling questions. Webinars are designed so that the host and any designated panelists can share their video, audio and screen.

An *advanced account* is required to request an upgrade for the webinar feature.
Contact ahszoom@ahs.ca to request the webinar add-on, if required.

Prior to Scheduling the Meeting: (consider printing as a resource)

1.) Login to Zoom and select the Settings icon   ⚙️   at the top right of the screen.

2.) Select   **View More Settings** ☑   at the bottom of the screen

3.) Review the Schedule Meeting settings and update the selections based upon your session needs, as guided below.

Waiting Room

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.

Waiting Room Options

The options you select here apply to meetings hosted by users who turned 'Waiting Room' on

✓ Everyone will go in the waiting room

[Edit Options] Customize Waiting Room

Participants video

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

Mute all participants when they join a meeting

Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves. Ⓥ

Private chat

Allow meeting participants to send a private 1:1 message to another participant.

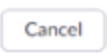**Sound notification when someone joins or leaves**

Play sound for:

◯ Everyone

🔘 Host and co-hosts only

When someone joins by phone:

☐ Ask to record their voice to use as the notification

[Save] [Cancel]

Co-host

Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

Meeting Polls

Allow host to use 'Polls' in meetings. Hosts can add polls before or during a meeting. Ⓥ

Screen sharing

Allow host and participants to share their screen or content during meetings

Who can share?

○ Host Only   ○ All Participants ⑦

Who can start sharing when someone else is sharing?

○ Host Only   All Participants ⑦

[Save] [Cancel]

Annotation

Allow host and participants to use annotation tools to add information to shared screens ☑

Whiteboard

Allow host and participants to share whiteboard during a meeting ☑

☑ Allow saving of whiteboard content ☑

☐ Auto save whiteboard content when sharing is stopped ☑

[Save] [Cancel]

Hide participant profile pictures in a meeting

All participant profile pictures will be hidden and only the names of participants will be displayed on the video screen. Participants will not be able to update their profile pictures in the meeting. ☑

Breakout room

Allow host to split meeting participants into separate, smaller rooms

Virtual background

Customize your background to keep your environment private from others in a meeting. This can be used with or without a green screen.

Show a "Join from your browser" link

Allow participants to bypass the Zoom application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited