



I. Overview

Zoom is a cloud-based audio/video conferencing platform.

At KCS, Zoom will be used for:

1. Traditional 1-on-1 meetings (e.g. counseling session);
2. Patient visits with “breakout rooms” (i.e. virtual rooms) to accommodate multiple people (MA, provider, and patients) in the same meeting for care coordination.

Note that there are two ways to access Zoom:

1. *Application:* download from <https://zoom.us/support/download>
 - To launch the meeting
2. *Web portal:* <https://zoom.us/signin>
 - To personalize and configure your account/meeting settings

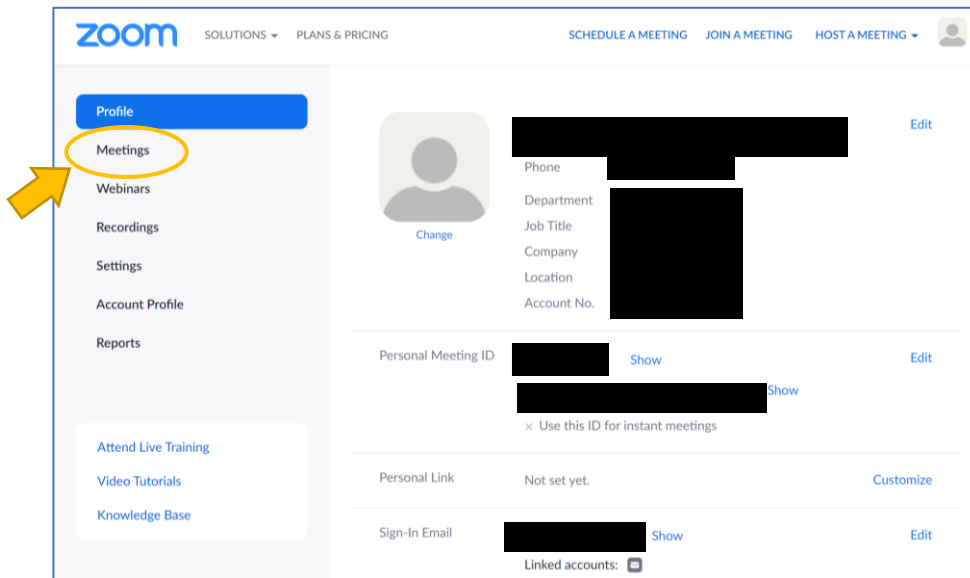
II. Setting up your Zoom meeting (via web portal)

**** You only need to do this once initially; skip to the next section if already set up**

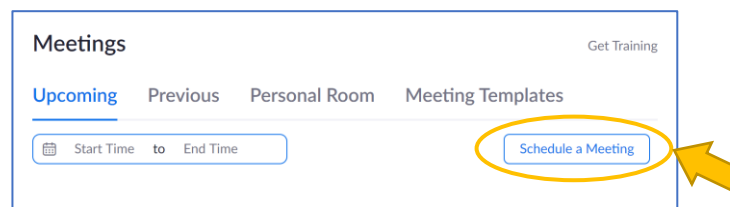
1. Go to the web portal (<https://zoom.us/signin>) and sign into your account.

A screenshot of the Zoom web portal's sign-in page. The page has a white background with a blue border. At the top, the Zoom logo is on the left, and navigation links 'JOIN A MEETING', 'HOST A MEETING', and 'SIGN IN' are in the center. An orange button labeled 'SIGN UP, IT'S FREE' is on the right. Below the navigation, the heading 'Sign In' is centered. There are two input fields: 'Email Address' and 'Password'. The password field has a 'Forgot?' link to its right. Below the fields, a small text line states: 'Zoom is protected by reCAPTCHA and the Privacy Policy and Terms of Service apply.' A large blue 'Sign In' button is centered below this text. At the bottom left, there is a checked checkbox labeled 'Stay signed in'. At the bottom right, there is a link 'New to Zoom? Sign Up Free'.

2. Go to “Meetings” tab on the left.



3. Schedule a recurring meeting with the following settings:



My Meetings > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

When

Duration hr min

Time Zone

☒ Recurring meeting Every day, until Dec 18, 2020, 48 occurrences

Recurrence

Repeat every day

End date ☒ By ☐ After occurrences

Choose the farthest date possible.

This does not mean that you have to be on Zoom every day/hour. It just means your meeting room will be active throughout this period with the same settings so that you don't have to repeat this process every time.

Registration

☐ Required

Security

☐ Passcode ☒ Waiting Room

Video

Host

☐ on ☒ off

Participant

☐ on ☒ off

Audio

☐ Telephone ☐ Computer Audio ☒ Both

Dial from United States of America [Edit](#)

Meeting Options

☒ Allow participants to join anytime

☐ Mute participants upon entry [?](#)

☐ Require authentication to join

☒ Breakout Room pre-assign

[+ Create Rooms](#) [↑ Import from CSV](#)

☐ Automatically record meeting on the local computer

Alternative Hosts

Save

Cancel

** Only if you need
breakout/virtual rooms

Breakout Room Assignment

4 rooms, 0 participants

Assign participants to breakout rooms by adding their email. You can create up to 50 breakout rooms and assign up to a total of 200 participants. [Learn more](#)

Rooms

+

Patient Room 1

Patient Room 2

Patient Room 3

BREAK ROOM

0

0

0

0

Patient Room 1

Add participants

No participants yet

[Import from CSV](#)

Cancel

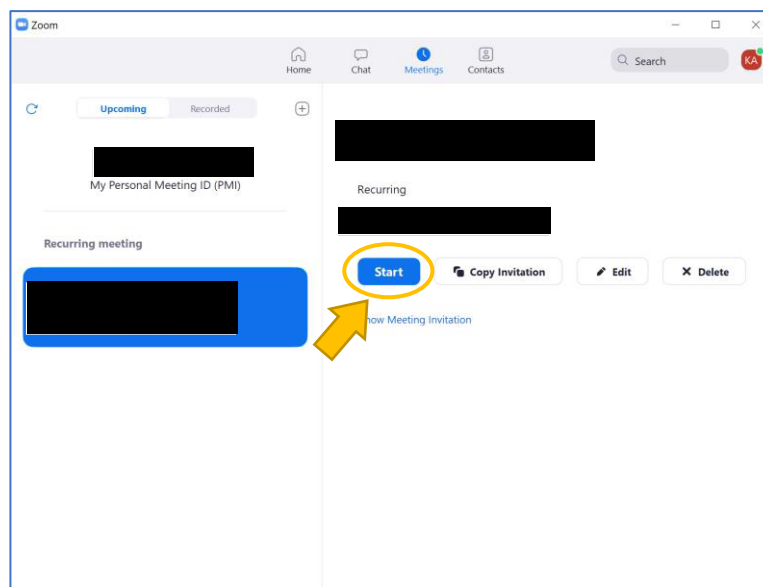
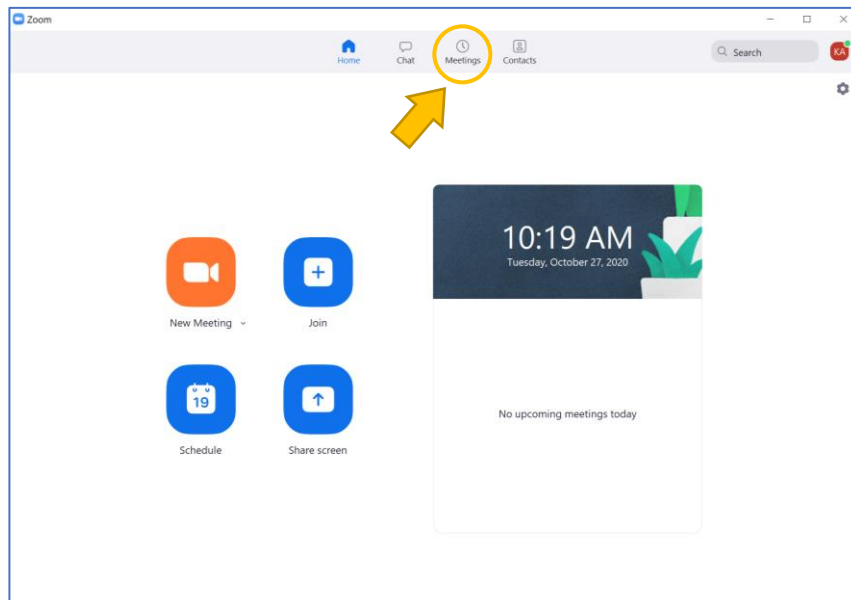
Save

III. Starting/navigating your meeting (via application)

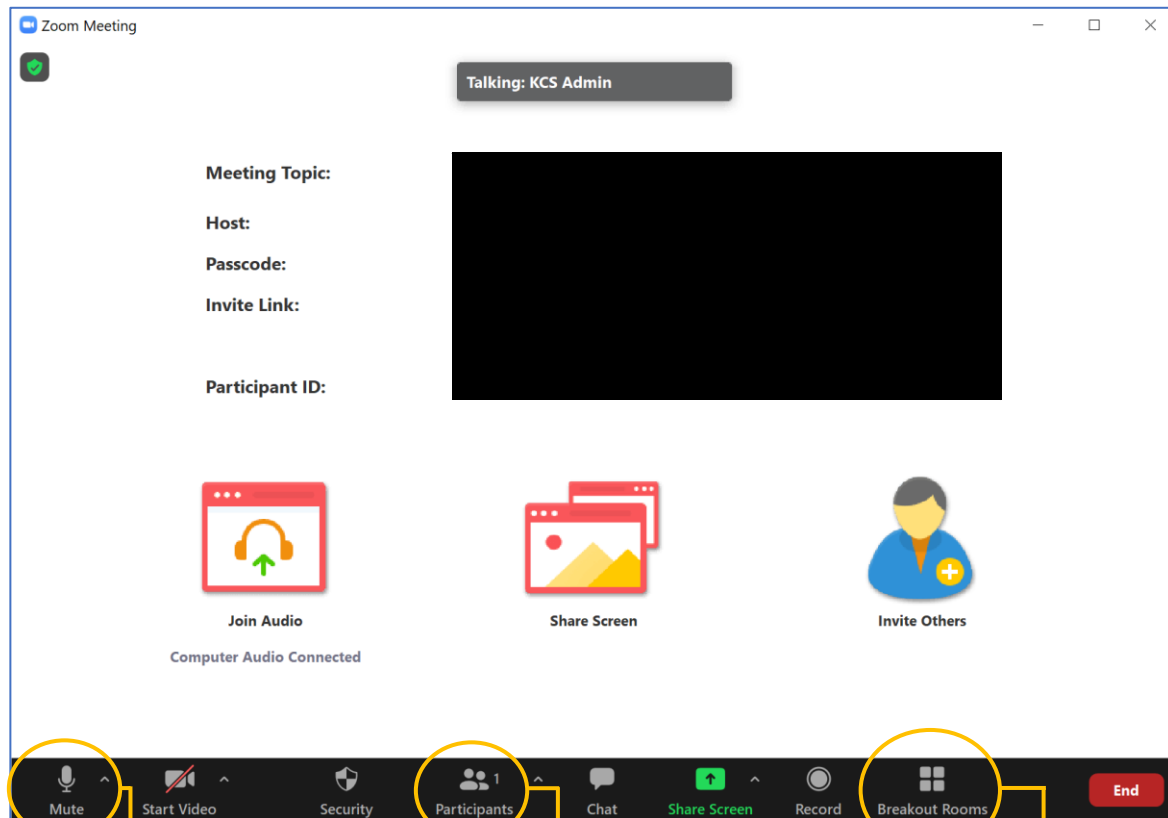
1. Launch the Zoom application and sign in.



2. If you have a recurring meeting (see section II), go to "Meetings" (top menu bar), then press "Start."



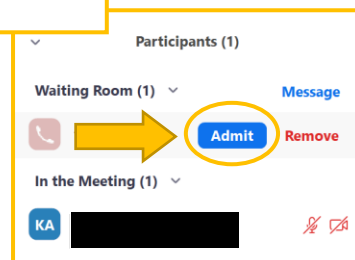
3. You are now in the meeting room and ready to take calls. Note the useful functions below.



This icon means others can hear you. When you click on the icon, a red line will show across the icon, indicating that you are now muted.

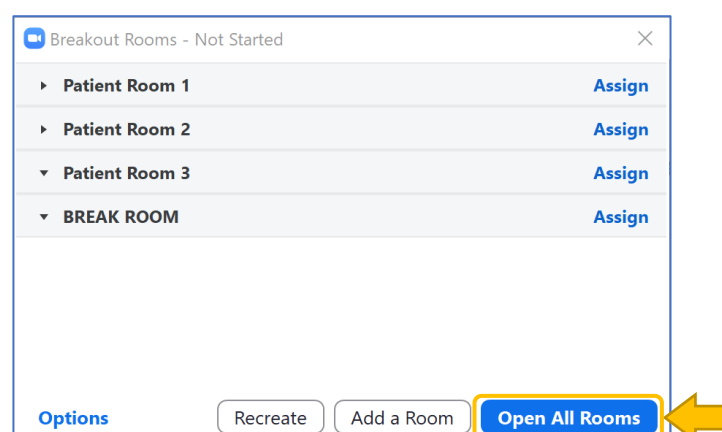
Clicking on this icon shows the list of participants on the right side of this window. You can admit new callers into the meeting from this list.

(If applicable) enter different breakout/virtual rooms by clicking on this icon.

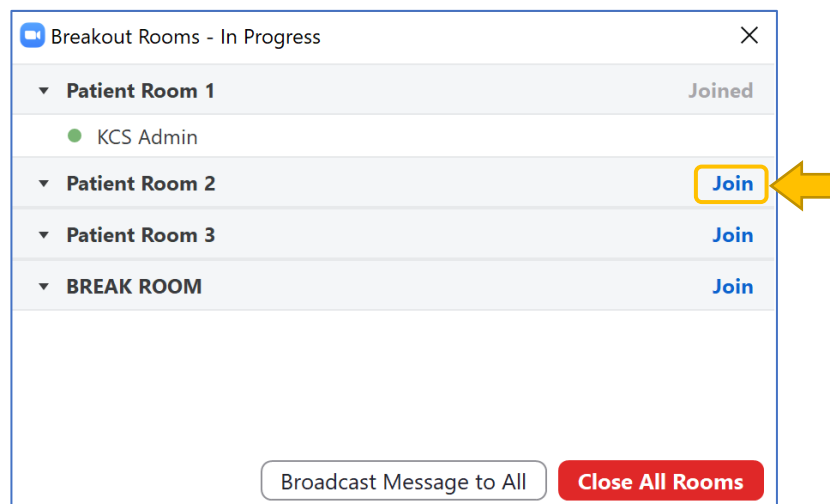


4. More on breakout/virtual rooms (if applicable).

- Each day when the meeting is first launched, the MA should click on the “Breakout Rooms” icon and “Open All Rooms.”



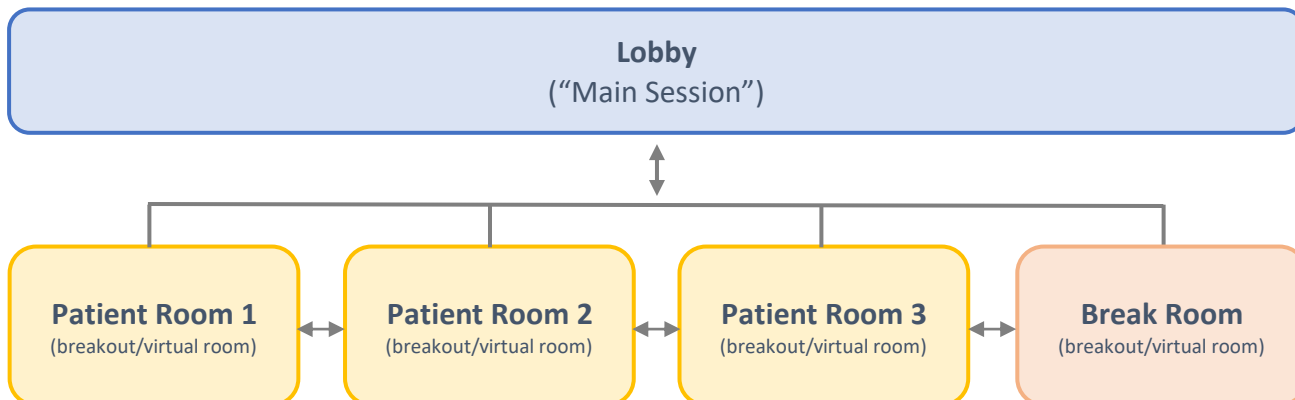
- Once breakout/virtual rooms are open, MAs and providers can move into different rooms by once again clicking on the “Breakout Rooms” icon and clicking “Join.”







- If you want to go back to the main session, click on “Leave Room” and then click “Leave Breakout Room.”



IV. Summary of Breakout/Virtual Rooms



V. Example Workflow when Using Breakout/Virtual Rooms

	Location	MA ("Host")	Provider ("Co-Host")
	Lobby (“Main Session”)	<ul style="list-style-type: none">- Admits Patient (caller) into the meeting.- Verifies Patient’s identity.- Places Patient in a breakout room (e.g. “Patient Room 1”)	
	Patient Room (breakout/virtual room)	<ul style="list-style-type: none">- Enters breakout room and collect in-take info.- Notifies Provider when done.	
	Patient Room (breakout/virtual room)		<ul style="list-style-type: none">- Enters breakout room and speaks with Patient.- If necessary, notifies MA to come back into the breakout room to collect additional info.
	Patient Room (breakout/virtual room)	Patient discharged.	

Notes:

- Patient remains in the “Patient Room” throughout their visit.
- When MA or Provider is not needed at the time, they default to the “Break Room.”
- MA is assigned as the “host” for the meeting, and Provider is assigned as a “co-host.”
 - Zoom allows there to be only one “host” for a meeting.
 - Host is the only one who can move *others* into a breakout/virtual room.
 - Both host and co-host can move in and out of breakout/virtual rooms themselves.