The purpose of this document is to provide instructions to use Zoom breakout rooms for multi-patient clinics with multiple clinicians rotating between breakout rooms. This might include a physician, medical learner and multidisciplinary team, etc. rotating between patients (each located in a designated Zoom breakout room) to complete their assessments and/or interventions.

**Meeting Settings**

**Web Portal Settings Prior to Scheduling Zoom Meetings**

Prior to scheduling any Zoom appointments, log into the Zoom web browser (https://albertahealthservices.zoom.us/) and ensure your settings are as follows.

**Note:** The following settings (private chat and allow host to assign participants to breakout room when scheduling) are not mandatory, however, may be helpful and are described below.

**Security Settings**

![Security Settings](image)
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Waiting Room Options
These options will apply to all meetings that have a Waiting Room, including standard meetings, PMI meetings, webinars.
Who should go in the waiting room?
- Everyone
- Users not in your account
- Users who are not in your account and not part of the allowed domains
Who can admit participants from the waiting room?
- Host and co-hosts only
- Host, co-hosts, and anyone who bypassed the waiting room (only if host and co-hosts are not present)

Schedule Meeting Settings

In Meeting (Basic) Settings

- Private chat
- Allow meeting participants to send a private 1:1 message to another participant.
- Co-host
- Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.
- Always show meeting control toolbar
- Always show meeting controls during a meeting
- Allow removed participants to rejoin
- Allows previously removed meeting participants and webinar panelists to rejoin
- Allow participants to rename themselves
- Allow meeting participants and webinar panelists to rename themselves.
In Meeting (Advanced) Settings

Advanced Options when Scheduling a Zoom Meeting using the Zoom Application

Note: Optional Alternative Hosts - enter the email address of AHS staff with an AHS advanced Zoom license who may act as alternative host in the meeting.
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Session Process

1. When the Zoom meeting starts, the host creates breakout rooms (found under Breakout Rooms on lower control panel. If Breakout Rooms is not listed on the control panel select and then choose Breakout Rooms). Ensure adequate time is factored into the meeting to allow for creation of breakout rooms and moving patients and clinicians into each room.

   It should be noted that co-hosts do not have full host control of breakout rooms (i.e., ability to start breakout rooms or move participants between breakout rooms).

2. Create one breakout room per patient and one team room. A team is defined as the group of clinicians providing care. The team room is the private virtual space for clinicians to meet. Select Assign Participants – Manually. Choose Create Rooms:

   ![Create Breakout Rooms](image)

2. Keep the Breakout Rooms screen open to assign participants and join the rooms.

3. Select to open the participant control panel (right side of the screen). The host has several controls including the ability to rename participants.
4. When patients enter the waiting room they will be asked to wait. **Note:** The host can send an additional message to all the patients in the waiting room if they wish.

![Zoom Meeting](image)

**Please wait, the meeting host will let you in soon.**

5. The host admits one patient from the waiting room to the main meeting room and renames them (e.g. first and last initials)

![Zoom Meeting](image)

6. From the Breakout Rooms screen, the host assigns the patient to a breakout room and selects **Open All Rooms**

![Breakout Rooms Screen](image)
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7. The patient must select Join

8. The host joins the patient in the breakout room, obtains two patient identifiers, confirms verbal agreement to proceed with the virtual visit using technology, and explains the appointment process.

9. The host asks the patient to remain in the breakout room during the appointment. If the patient needs assistance, the patient can select More and choose Ask for Help.

10. The host continues the same process with the remaining patients. Note: Each patient is assigned to their own breakout room.

11. The host oversees the clinic:
   - The host moves clinicians into the breakout rooms in rotation.
   - When ready to move to another breakout room, clinicians can select Ask for Help to alert the host.
   - If a patient exits their respective breakout room they will enter the main meeting space. The host should move the patient back to the breakout room and discuss any questions within the breakout room.
   - If the host closes all breakout rooms the participants will appear in the main meeting room. The host should turn off patient video to ensure confidentiality.

Privacy Considerations

It is necessary to ensure that all reasonable precautions are taken to protect the privacy of patients attending the virtual clinic.

General Principles
- Standard AHS Confidentiality and Privacy practices apply to virtual sessions in the same way they apply to in-person appointments.
- Deviations from best practices may result in a privacy breach.
- AHS employees are required to report privacy breaches even if the staff were not involved in the situation.
- Email InfoCare@AHS.ca if unsure whether a situation requires reporting.
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- For further information, refer to Zoom Support Kit for AHS Clinicians and Virtual Health on Insite

Protecting Patient Privacy when Using Breakout Rooms for Clinics
- Session must be scheduled and conducted from an AHS Zoom account
- Do not use the main Zoom meeting room for confidential conversations, aside from the initial admission and renaming of the patients
- A team breakout room can be created for case discussions. Patients would not be admitted to this room
- Patients enter the waiting room when they join the Zoom session
- The host admits one patient at a time to the main Zoom meeting room, renames them and places them in a breakout room
- Only one patient/family is admitted per breakout room
- If a patient enters the main meeting room from their breakout room the host should return the patient to their respective breakout room
- If multiple patients enter the main meeting room the host/co-host should turn off the patients’ video to protect their privacy
- If a clinician does not wish to be interrupted while in a breakout room with a patient, the clinician can select Ask for Help to inform the host
- The setting Chat-Allow meeting participants to send a message visible to all participants has been enabled and locked by the Administrator, and should be monitored by the host/co-host. Private Chat can be enabled but should be used cautiously to avoid a breach of confidentiality or unintended messages being sent

Suggested Privacy Information for Patients

It is important to provide patients information related to specific privacy considerations that will be followed during their appointment. Below is suggested information to provide to the patient:

You have been invited to attend a Virtual appointment. Several safe-guards will be used to protect your privacy during the session. AHS Zoom calls are encrypted. You will be renamed when you are brought into the session. The Team will meet with you privately in your own breakout room.

Please ensure that you have discussed the benefits and risks of using virtual care with the clinic. Click here for more information: Learn about Virtual Visits for Healthcare. Call the clinic if you have any questions about your virtual appointment.

Please note AHS Virtual Health frequently reviews and updates documents. To ensure you are using the most current version, please download directly from the Virtual Health internal or external webpage at the time of use.