# VIRTUAL APPOINTMENTS
# BEST PRACTICES FOR PROVIDERS
**2/3/2022**

**HMA**
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**Individual appointments or group therapy are not meetings, they are healthcare delivery.**
Certain things may be acceptable during meetings that we avoid during healthcare delivery. Examples of differences include wearing professional attire, limiting distractions such as email, phones and animals.

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## Before Going on Camera:

☐ Download the audio video application you intend to use.

☐ Test the internet/ Wi-Fi connection, video, and audio capabilities each day, prior to your first appointment.

☐ Ensure your internet is running at least 20 megabits per second, which you can check on sites such as Speedtest.net, or fast.com. If your internet is below 20 megabits per second, try turning off any other devices that are using the same internet source.

☐ Set up chargers so your computer and/or phone battery don't run low.

☐ Find an empty, quiet space with a door that closes to ensure privacy. Close the door and use a do not disturb sign to ensure no disruption.

☐ Minimize background noise as much as you can.

☐ Close all programs on your computer. This will reduce the chances of distractions, such as desktop notifications, as well as keep your email secure.

☐ Make sure you have anything you need such as medical records, and lab results.

☐ Understand how to use any technology tools needed to teach the skills you have planned for the day.

☐ Address biological issues such as hunger, thirst or restroom needs before the meeting starts.

☐ A simple background works best. There are digital backgrounds available on some telehealth platforms but think about the implications of using one with your patients.

- Pros- you don't need to be concerned about distractions in your background.

- Cons- your patients will be less inclined to show you their setting if they can't see yours. Also, hand gestures are harder to see, as your hands may blend into the background.

☐ Camera angle is important. Make sure your eyes are looking into the camera so the patients perceive you are looking at them.

☐ Position yourself so your patient is seeing you from the chest or waist up. This is especially beneficial to capture hand gestures when you talk.

☐ Dress appropriately. This is a medical appointment. Don't wear stripes or patterns as they can shimmer on camera and be very distracting.

☐ Position yourself so that most of the light is coming from in front of you (behind your monitor), instead of behind you. If you have a window behind you, shut the blinds.

## Have a Plan for:

☐ Identifying patients
☐ Obtaining consent
☐ Technology failure, such as feedback

☐ Video-conference hijacking (such as Zoom bombing)
☐ Crisis interventions
☐ Disruptive patients

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## Important Features in Zoom for Group and Individual Appointments

You may be familiar with some of these settings, and similar features exist for other telehealth platforms. To access the **Settings** in Zoom discussed in the table below, go to **zoom.us** and log into your account, then choose "Settings" on the right side of the screen. **Note:** Alternative Host and Lock Meeting are not part of these settings and are accessed while scheduling your meeting, or after the meeting has been started, respectively.

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| FEATURE | WHY | HOW | DETAILS |
|---|---|---|---|
| **PASSCODE** | Your meeting will be more secure and unwanted/ uninvited participants will not be able to join. | In Zoom settings, under the "Security" section, toggle the option for "Require a passcode when scheduling new meetings" on. | A passcode will be generated when scheduling a meeting and participants will need the passcode to join the meeting. The Zoom invitation will include the passcode as well as the meeting ID. Participants will not need to enter the password if they click the link in the invitation you send them. |
| **WAITING ROOM** | Allows for the host, co-hosts, and/or alternative hosts to huddle before having the rest of the participants join. | In Zoom settings, under the "Security" section, toggle the option for "Waiting Room" on. | The host will have the option to admit participants one-by-one, or all at once. |
| **MUTE ON ENTRY** | For the beginning of a group appointment to go smoothly without people talking over one another. | In Zoom settings, under the "Schedule Meeting" section, toggle the "Mute all participants when they join a meeting" on. | The host controls whether participants can unmute themselves in the meeting. For group therapy, you will want to enable participants' ability to unmute themselves. |
| **ENTRY CHIME** | To inform the host and co-hosts of new arrivals but not distract all participants | In Zoom settings, under the "In Meeting (Basic)" section, toggle the "Sound notification when someone joins or leaves" on. | If the chime is enabled, the options are to play sound for (1) Everyone or (2) Host and co-hosts only. |
| **CO-HOST** | The co-host feature allows the host to share hosting privileges with another user, allowing the co-host to manage the administrative side of the meeting. | In Zoom settings, under the "In Meeting (Basic)" section, toggle the option for "Co-host" on. | The host is the only user who can assign a co-host. Co-hosts do not have access to full meeting controls such as starting closed captioning, live streaming or ending meeting for all. |
| **BREAKOUT ROOMS** | If there is a need to do an individual assessment, for someone being very disruptive or suicidal, you can move them into a separate Zoom room from everyone else. | In Zoom settings, under the "In Meeting (Advanced)" section, toggle the option for Breakout room on. | The host and the co-host will be able to move participants to and from breakout rooms. The host or co-host can join the breakout rooms as well. |
| **ALTERNATIVE HOST** | When scheduling a meeting, the host can designate another Licensed user on the same account to be the alternative host. The alternative host can start the meeting on the host's behalf. | Use the Advanced Settings when scheduling your Zoom meeting to enter the email address of the person you would like to be the alternative host. | The alternative host can start the meeting using the join link in the invite sent to them by the host. If the original host joins after the alternative host, the original host will always regain control of the meeting and become host. |
| **LOCK MEETING** | After all participants have arrived, locking the meeting provides an added layer of protection form others joining. | Once your meeting has started, click the Security icon at the bottom of your Zoom window. In the pop-up, click the button that says Lock Meeting. | When you lock a Zoom Meeting that's already started, no new participants can join, even if they have the meeting ID and passcode. |