Using Break Out Rooms on Zoom for Telehealth

Used for Team Care Centers and Multi-Disciplinary Clinics

DECIDING WHO WILL BE THE HOST

- By default, the Host is the owner of the Zoom meeting room to which the patient and team are invited.
- The team and patients will always receive invite of the **PROVIDER's** Zoom meeting, so provider **MUST** start meeting 10-15 minutes before Clinic begins for breakout room set-up.
- The Host may continue in that role or delegate the Host role to another Zoom user.
- Breakout rooms can be useful: 1) when provider is seeing patients with other team members and needs flexibility to move from one room to another without discharging patient 2) when provider would like another user to coordinate and control clinic flow.

STEPS FOR THE HOST

1. Zoom Meeting Owner logs into Zoom 10-15 minutes before clinic starts.
2. Start **New Meeting** by clicking 🎥
    - If you will not be the **Host** of the Zoom meeting, wait for coordinator to join meeting. Left click on **More**, select **Make Host** to delegate host duties.
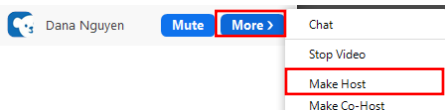
3. Host assigns each team member as **Co-Host**.
    - Make sure the original Host is assigned as a Co-Host.
    - Click **More** and select **Make Co-Host**. Then click **Yes** to confirm.
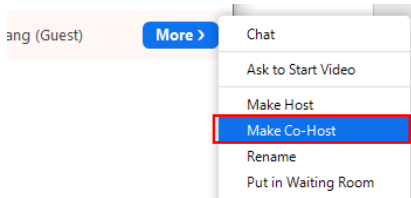

4. Create the Zoom breakout rooms.
    - Click the **Breakout Rooms** icon on Zoom tool bar.
    - Select **Manually** or **Assign Manually** before clicking on **Create Rooms**.
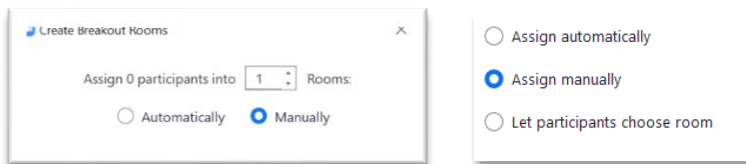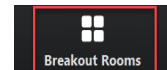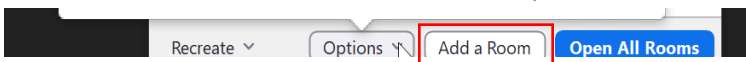

*New versions of Zoom

   - Edit **Options**. Turn <u>on</u> **Move all participants into breakout rooms automatically** (Note: Newer versions of Zoom will say: "Automatically move all assigned participants into breakout rooms"). Turn <u>off</u> the rest.
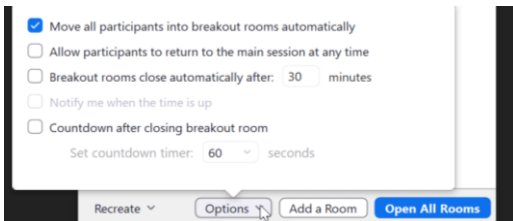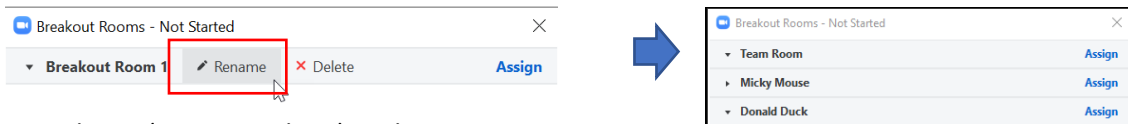

   - Click **Add a Room** to create a room for each patient on the schedule.

   i. Create at least one extra room to enable team/provider discussions (i.e. "Team Conference" or "Provider Room" or "Team Room") and to facilitate clinic flow.
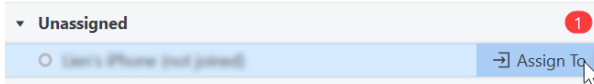
- Rename breakout rooms by hovering over each room's line until you see **Rename**. Click and type.
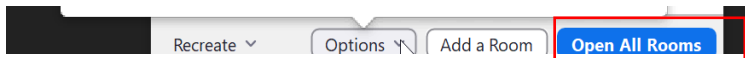

- Assign co-hosts (team members) to the Team room.
    - i. Click **Assign** on each room's line and check off who will go into the room.

    - ii. If a team member joins the session late, you will find them in this **Unassigned** list. Admit, make Co-Host, and click **Assign To**.
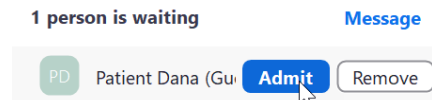

- **Open All Rooms**. Team members will then be automatically moved to the Team room.

    NOTE: You CANNOT add more rooms or edit rooms after you **Open All Rooms**.

## Host Admits and Assigns Patients to Breakout Rooms:

5. One by one, admit each patient from participants list and greet the patient.

- Assist with any audio or video troubleshooting.
- Ask patient to verify their name and DOB upon entering the room; if patient did not enter their name correctly rename participant.

6. Explain to patient that you will now move patient to his or her room to wait for a team member.
    - Move patient. Assign patient to his or her room. Patient will stay there for the entire clinic.
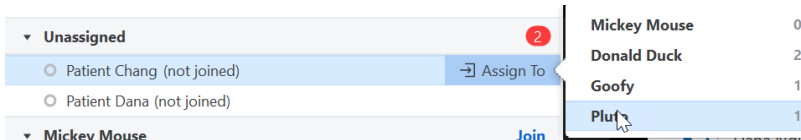
    - Once a patient has joined his or her breakout room, Host can then admit the next patient.
    - NOTE: Patients can be admitted from the main session ONLY by Host. If Host is in a Breakout Room, Leave Breakout Room to Return to the Main Session to Admit.
        - i. **Leave Breakout Room**.
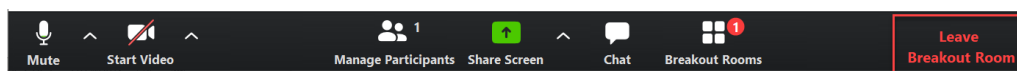
        - ii. **Return to Main Session**.

        - iii. Admit patient from participants in the virtual waiting room.

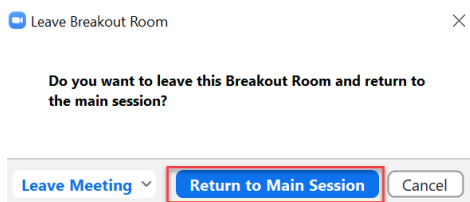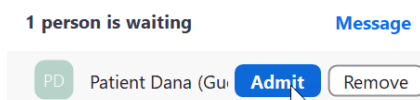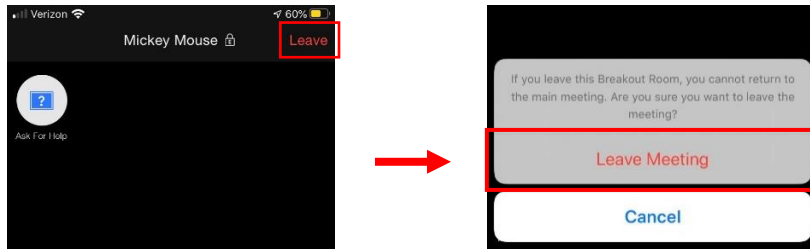7. Team members (Co-Hosts) can now join patient rooms and conduct the telehealth visits. Team members refer to **Co-Host** section for more instructions.
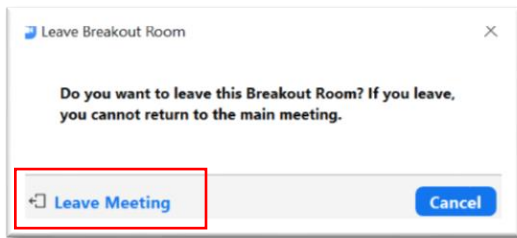
Host Ends the Virtual Visit for Patients

8. If on older Zoom versions, the Host cannot **Remove** patient from breakout rooms. Team needs to ask patient to leave meeting.

- **Patient's Mobile View:**

- **Patient's Computer View:**

- Newer versions do allow **Remove.** Patients will not be able to join main session again.

Host Ends the Day

9. When team clinic concludes, host will close all rooms and end meeting for all. If needed, the Zoom session can continue, while the host can repeat Steps 3-4 to assign co-hosts and rename breakout rooms according to more patients scheduled.

STEPS FOR CO-HOSTS

1. Log into Zoom with your account email and password.
   - Join Host's Zoom meeting by clicking Zoom meeting URL or entering Personal Meeting ID.
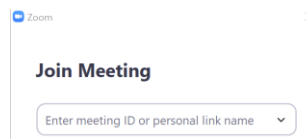
2. Host will admit you to the main session and assign you to the provider room.

3. Manage your movements by clicking **Breakout Rooms** icon on Zoom tool bar.
4. Join/ Leave rooms as needed by clicking **Leave** and **Join**. When done with a patient, move back to the "Team Room."
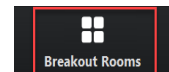
5. If Co-hosts accidently leave breakout room, click the **Breakout Rooms** icon to join them back into the team room.

Troubleshooting Tips

1. **Telehealth Zoom vs. Personal Zoom**

   - Make sure you have the CHOC telehealth Zoom to ensure you have the same settings as your team and are HIPAA compliant. An account with us would give you a Zoom URL that reads: https://**choc.**zoom.us/j/...

   - If it doesn't, let us know by calling the IT Help Desk, X4457 option 9 for Telehealth.

2. **How do you know which Zoom meeting to join?**

   - Discuss this with your team to ensure members get the Zoom information before clinic starts. The team can share Zoom URL or Personal Meeting ID ahead of time. Team may also invite team members while in Zoom.

3. **When do you need to make someone else *Host*?**

   - If patients are scheduled with your Zoom information (URL, Personal Meeting ID), but someone else is going to manage the flow of clinic, give him or her *Host* role. Make sure they then give you *Co-Host* role.

4. **Who do you make Co-Hosts?**

   - Only make other team members/clinic staff co-hosts. Keep patients as guest participants.

5. **Why won't Zoom let you assign team members like the guide shows?**

   - Did you *Manually* create rooms? If not, you will need to start over to manually manage breakout rooms. Either *Recreate* or *Close Rooms* to start over. Always remember to create rooms *Manually* to save you the trouble!

6. **Can't see *Rename* for breakout rooms?**

   - Hover and move the mouse around from line to line in the list to let it pop up.

7. **Can your team members join late?**

   - Yes! Host needs to *Leave Breakout Session* to admit team member. Remember to make co-host before assigning team member to a room.

8. **Does it matter if breakout rooms are created before your team members join?**

   - Rooms can be created before team members join but cannot be opened until at least one team member is assigned to a room. Alternatively, before you create breakout rooms, all team members can be admitted to the main session to prepare for clinic. Consider your clinic flow and dynamics to see what fits best for you.

9. **Team members don't see the Breakout Room Icon?**

   - The button will only appear once Host opens the breakout rooms.
   - Co-Hosts on mobile devices cannot navigate from room to room. Host will need to control their movements.

10. **Heard the entry sound while you were in the breakout rooms but don't see the patient?**

    - Go back to the main Zoom session, select Manage Participants to admit the patient.

11. **Why is the patient able to go back to the main Zoom session?**

    - 'Options' (Step 4) were not set up correctly. You will NOT be able to go back to Options unless you were to Close All Rooms. Ensure that only the first setting in Options is turned on: *"Move all participants into breakout rooms automatically."* Failure to do this can create potential breach of privacy.

12. **Do not *Close All Rooms* with patients still in them**. This will move patients back into the main session, where they can see each other creating a potential breach of privacy.