

# **Zoom for Health**

## **Getting Started Guide**

This guide will walk you through key tasks needed to use Zoom for Health; the only university-approved way to conduct online meetings and audio conference calls involving health information, including Protected Health Information (PHI) regulated by the Health Insurance Portability and Accountability Act (HIPAA).

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#### **Getting Started Guide**



## Zoom for Health Account Activation

Activating your Zoom for Health profile is done by simply logging into the Zoom for Health web portal.

- 1. Open a web browser and go to <u>https://hipaa-zoom.arizona.edu</u>
- 2. Select "HIPAA Zoom Login" and enter your UA NetID and password. You will also need to use <u>NetID+</u> secondary authentication to gain access to the system.



3. You will be taken to your Zoom for Health account profile page. Your account is now active.

ZOOM SOLUTIONS - PLANS & PRI	CING CONTACT SALES		SCHEDULE A MEETING	JOIN A MEETING	HOST A MEETING +	
Profile Meetings Webinars Recordings	Change	Account No.				Edit
Settings Account Profile	Personal Meeting ID					Edit
Reports		$\times$ Use this ID for instant meetings				
	Personal Link	Not set yet.				Customize
Attend Live Training Video Tutorials	Sign-In Email	@hipaa.email.arizona.edu Linked accounts:				
Knowledge Base	User Type	Pro 🛛				
	Capacity	Meeting 300 @				
	Language	English				Edit
	Date and Time	Time Zone (GMT-7:00) Arizona				Edit
		Date Format mm/dd/yyyy Time Format × Use 24-hour time	Example: 08/15/2011			
						<b>D</b> Help



## Schedule Delegation

The schedule delegation tool allows others to schedule on your behalf. Only University employees who have logged into the <u>Zoom for Health web portal</u> to activate their profile will be available for schedule delegation.

1. After you've logged in, select "Settings", then "Other".



2. locate the "Schedule Privilege" section and select the plus sign next to "Assign Scheduling Privileges to".

		REQUESTADEMO	1.888.799.0125 R	SOURCES - SUPPO
PLANS & PRICING CONTACT SALES	SCHEDULE A MEETING	JOIN A MEETING	HOST A MEETING	
Schedule Meeting	Other			
In Marking (Deale)		-		
in Meeting (Basic)	Blur snapshot on iOS task switcher			
In Meeting (Advanced)	snapshot of the Zoom main window. This snapshot display as the preview			
Email Notification	screen in the iOS tasks switcher when multiple apps are open.			
Other	Invitation Email			
	Your meeting attendees will receive emails in language based upon their browser/profile settings. Choose languages which your expected attendees w receive content in to edit.	vill		
	Choose email in language to edit English			
	Send me a preview email			
	Schedule Privilege You can assign users in Y ur account to schedule meetings on your behalf. Y can also schedule meetins on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account. Assign scheduling privilege to No one I can schedule for No one	u.		
	Integration Authentication			
	Regenerate			O Help

3. Type the person's NetID (prefix of their UA email) followed by @hipaa.email.arizona.edu. Then select "Assign". If the person does not show up, ask them to log into the <u>Zoom for Health web portal</u> before attempting delegation.

Assign scheduling privilege
NetID@hipaa.email.arizona.edu
Enter the email addresses of those who can schedule meetings on your behalf. Use a comma to separate multiple email addresses.
Cannot find the user NetID@hipaa.email.rizona.edu in your account.
Assign



## Scheduling

Zoom for Health requires that all meetings are scheduled from the Zoom for Health web portal.

1. To schedule a meeting, select the "Meetings" tab, then select "Schedule a New Meeting".

					REQUEST A DEMO	1.888.799.0125 RESC	DURCES - SUPPORT
	5 & PRICING CONTACT SALES			SCHEDULE A MEETING	JOIN A MEETING	HOST A MEETING +	
Profile	Upcoming Meetings	Previous Meetings	Personal Meeting Room	ı			Get Training
Meetings Webinars	Schedule a New Meeting	Join a meeting from an H.32	23/SIP room system				
Recordings	Start Time 💠	Topic ÷		Meeting	ID		
Settings							
Account Profile			The user does not have any up To schedule a new meeting click !	coming meetings. Schedule a Meeting.			
Reports							

2. Enter your meeting title in the "Topic" field, making sure to exclude any confidential information. Select the date, time and duration.

	PLANS & PRICING CONTACT SALES		SCHEDULE A MEETING	JOIN A MEETING	HOST A MEETING -	
Profile Meetings	My Meetings > Schedule a Schedule a Meeting	Meeting				
Webinars Recordings Settings	Outlook Plu; Schedule your	gin for Zoom Zoom meetings directly from Outlook with the Outlook plugin.	Click here to download.		$\times$ Do not show this me	ssage again
Account Profile Reports	Topic Description (Optional)	Confidential Meeting - 10/04/2019 Enter your meeting description				
Attend Live Training Video Tutorials Knowledge Base	When	10/04/2019 (4:00 · ) PM · )				
	Time Zone	(GMT-7:00) Arizona				

3. Scroll down to "Meeting Options". If these settings are left as-is, you (the host) will have to launch the meeting from the web portal. You'll need to select "Enable join before host" to launch the meeting from the "Join URL".

Meeting Options	a. CRequire meeting password			
	b. 🕲 Enable join before host			
	Mute participants upon entry 🔞			
	d.   Enable waiting room			
e. Alternative Hosts	Net/D@hipaa.arizona.edu			
	Save Cancel			

Meeting Options and Alternative Hosts explained:

- a. *Require meeting password* Selecting this option will generate a numerical password that will be required for your participants to join the meeting. You can edit this password as needed.
- b. *Enable join before host* Selecting this option will allow you to launch the meeting from the "Join URL". Additionally, your participants will be able to join the meeting prior to you (the host).



- c. *Mute participants upon entry* This will mute all participants as they join. They will be able to unmute themselves as needed.
- d. *Enable waiting room* Selecting this will allow your participants to wait for you and also require that you log into the web portal to launch the meeting.
- Alternative Hosts You can assign alternative hosts that can launch the meeting in your absence. Your alternative hosts will need to activate their Zoom for Health profile prior to being assigned. Assignment requires that you use the following format: UANetID@hipaa.email.arizona.edu.
- 4. Confirm your meeting options and alternative hosts, then select "Save".
- 5. Your meeting has been scheduled. You can now save the event to your calendar, copy the "Join URL" or "Copy the invitation" for distribution. \*The meeting will not be populated in your standard Zoom application. You'll need the "Join URL" or access to the web interface to launch the meeting.

	NS & PRICING CONTACT SALES		SCHEDULE A MEETING	JOIN A MEETING	HOST A MEETING +	
Profile Meetings Webinars	My Meetings > Manage "r Topic	Confidential Meeting - 10/04/2019" Confidential Meeting - 10/04/201	9		Start t	his Meeting
Recordings Settings	Time	Oct 4, 2019 04:00 PM Arizona Add to Google Calendar	Add to your calendar	alendar		
Account Profile Reports	Meeting ID	716-353-638 Copy and distribute	the join url		Copy the i which lists to join the	nvitation every way meeting.
Attend Live Tesising	Invite Attendees	Join URL: https://uits-arizona.zoom	nus/j/716353638		Copy the	invitation
Video Tutorials Knowledge Base	Video	Host Participant	Off			
	Audio	Telephone and Computer Audio Dial from United States				
	Meeting Options	× Require meeting password				
		× Mute participants upon entry 🕼	)			
	Delete this Meeting Want to invite view-only participa	nts or broadcast the event to up to 10000 partic	ipants? Convert this Meeting to a Webinar	Edit this Meet	Start this N	1eeting



## Launching Your Meeting

Whether launching your meeting from the <u>Zoom for Health web portal</u> or "Join URL", you'll need to have the application installed on your device. You can download the application by going to <u>https://arizona.zoom.us</u> and selecting "Download Client" at the bottom of the page. If using a mobile device, download the Zoom App from your mobile application store.

#### Launching from the Web Portal

- 1. Log into Zoom for Health at <u>https://hipaa-zoom.arizona.edu</u>.
- 2. Select "Meetings", then locate the meeting you want to launch and select "Start". This will open the "Join URL" in your web browser and prompt you to open the local application.

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	PRICING CONTACT SALES		SCHEDULE A MEETING	JOIN A MEETING	HOST A MEETING -	
Profile	Upcoming Meetings	Previous Meetings Persona	I Meeting Room			Get Training
Meetings						
Webinars	Schedule a New Meeting	Join a meeting from an H.323/SIP room s	ystem			
Recordings	Start Time 💠	Topic 💠	Meetin	g ID		
Settings	Today	Confidential Meeting - 10/	04/2019 716-3	53-638	Start	Delete
Account Profile	04:00 PM					
Reports	Fri, Oct 11 01:30 PM	No PHI Here Meeting 10/1	1/2019 642-2	71-434	Start	Delete

#### Launching from the Join URL as Host or Alternative Host

If you selected "Enable join before host" when you scheduled the meeting, you, as the predefined host/alternative host will be able to launch the meeting from the "Join URL".

1. Select the "Join URL" from your calendar application or other repository. This will open the "Join URL" in your web browser and prompt you to open the local application.





## Hosting your Meeting

The host role will default to the first authorized host who enters the meeting. This could be you as the meeting scheduler or one of the alternative hosts, if delegated. Alternatively, if you are unable to attend the meeting and you did not delegate any alternative hosts, you can distribute the "Host Key" to an authorized person, which will give the host role and controls to them when they claim the host role.

Ensuring your meeting is correctly hosted will assist with the security of your meeting and allow the host to remove unauthorized participants and lock the meeting (covered in the <u>Securing your Meeting section</u>).

#### Verify you are the Meeting Host

Verify you are the meeting host by hovering over the bottom of the application window to reveal the meeting options. Select "Manage Participants", then verify it says "(Host, me)" to the right of your name. If you are not the pre-defined host/alternative host but were given a "Host Key", reference the next sub-section for guidance.





#### Using the Host Key

To have another authorized person host the meeting with the host key, you'll need to select "Enable join before host" when scheduling the meeting (shown in the Scheduling section). Additionally, you'll need to give the authorized person the host key.

1. To access your host key, log into the Zoom for Health web portal at <u>https://hipaa-zoom.arizona.edu</u> and locate the "Host Key" section. Then select "Show".

ZOOM SOLUTIONS - PLAN	IS & PRICING CONTACT SALES	220-071-1648 SCHEDULE A MEETING JOIN A MEETING HOST A MEETING +	
Reports		$\times$ Use this ID for instant meetings	
	Personal Link	Not set yet. C	Customize
Attend Live Training Video Tutorials	Sign-In Email	i@hipaa.email.arizona.edu Linked accounts:	
Nowedge base	User Type	Pro 😡	
	Capacity	Meeting 300 @	
	Language	English	Edit
	Date and Time	Time Zone         (GMT-7:00) Arizona           Date Format         mm/dd/yyyy         Example: 08/15/2011           Time Format         × Use 24-hour time	Edit
	Calendar and Contact Integration	You can integrate with 3rd party services or apps, such as Google, Outlook or Exchange, to sync the calendar and contacts. Connect to Calendar and Contact Service	
	Host Key	Show	Edit
	Signed-In Device	Sign Me Out From All Devices 🛛	

2. From here you can copy the system-generated host key or select "Edit" and choose a different 6-digit key.

Host Key	218043	Hide	<u>Edit</u>	

- Transmit the host key to your authorized person in a secure fashion. This can be done by delivering a secured hard copy or transmitting through an encrypted email/system. \*Consult your local IT group for guidance on encrypted communications.
- 4. Once your authorized person has the host key, they can access the meeting through the "Join URL". After they join the meeting: Hover over the bottom of the application window and select "Participants", then select "Claim Host" at the bottom of the participant window.



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		Zoom M	eeting ID: 181-914-950				
0 🔒		Talking:		×	~	Participants (2)	
					BT	(me)	1/2 1
					RDI Tra	aining Team	1/2 1
	Meeting Topic:	Don't put PHI in the Meeting Title 10	0/07/2019				
	Host Name:						
	Invitation URL:	https://uits-arizona.zoom.us/j/18191	4950				
		Copy URL					
	Participant ID:	26					
	<b>A</b>		<u></u>				
	Join Audio	Share	Invite Others				
	computer Auto connecteu						
1/4 ~ V	A _	🗘 🎗 📫	<b>9</b>	Leave Meeting	Unmute Me	Raise Hand	Claim Host
Unmute Start	Video	Invite Participants Share	Chat			-	

5. In the popup window, enter the six-digit host key and select "Claim Host". The authorized person will now have security control over the meeting.

$\bigcirc \bigcirc \bigcirc \bigcirc$	Claim Host
	Enter the Host Key to claim host role           218043         Claim Host           Host Key is a 6-10 digit number
	OR
	Login to Claim Host



## Securing your Meeting

After you have established yourself as the meeting host you can secure your meeting. This involves removing unauthorized participants and locking the meeting to ensure you don't have any unauthorized guests.

#### **Removing Participants**

1. To remove an unauthorized participant, hover over the bottom of the application window and select "Manage Participants" to show the participant list.

• • •		Zoom Meeting ID: 767-835-868		
© <b>A</b>		Talking:		3
	Meeting Topic:	Authorized Persons Only - Meeting #8	871 - 10/07/2019	
	Host Name:			
	Invitation URL:	https://uits-arizona.zoom.us/j/767835	868	
		Copy URL		
	Participant ID:	43		
			2	
	Join Audio Computer Audio Connected	Share	Invite Others	
🔏 🔺 🗡 🔿		<b>L</b> a <b>L</b> l <b></b>	^ <b>🗭</b>	End Meetin
Unmute Start Video		nvite Manage Participants Share	Chat	

2. Hover over the participant you want to remove and select the dropdown arrow by "More". Then select "Remove".

•••	Zoom		
	Talking:	<ul> <li>Particip</li> </ul>	ants (3)
-		BK	(Host, 🎉 🏴
		BT	Unmute More~
		RDI Training Tea	Ask to Start Video
Meeting Topic:	Authorized Persons Only - Meeting #871 - 10/07/2019		Make Heat
Host Name:			Rename
Invitation URL:	https://uits-arizona.zoom.us/j/767835868		Remove
	Copy URL		
Participant ID:	43		

3. Select "OK" to remove the unauthorized participant.





#### Locking your Meeting

1. To lock the meeting, select "Manage Participants", then select the dropdown arrow by "More" at the bottom and select "Lock Meeting".

		Zoom Mee	ting ID: 767-835-868			
() <b>û</b>		Talking:		*	<ul> <li>Participant</li> </ul>	s (2) (Host, 🥻 🌠
					RDI Training Team	<b>W</b>
	Meeting Topic:	Authorized Persons Only - Meeting #8	871 - 10/07/2019			
	Host Name:					
	Invitation URL:	https://uits-arizona.zoom.us/j/767835	5868			
		Copy URL				
	Participant ID:	43				
	Join Audio Computer Audio Connected	Share	Invite Others			
Unmute Start Video		Lo 2 C Invite Manage Participants Share	∧ ∰ Chat	End Meeting.	Mute All Unmute /	Nore Y
					Mute Participants On El ✓ Allow participants to un Play Chime for Enter#X ✓ Allow Participants the Lock Meeting	nurv pointe themselves it name themselves

2. Select "OK" to prevent anyone else from joining the meeting. If you need to allow an authorized participant access after locking the meeting you can select "More" and "Unlock Meeting".





## Resources

- HIPAA-related Questions: Email the HIPAA Privacy Program
- **Zoom Help:** <u>Email Student Academic Technologies</u> | Visit the Zoom Help Center and learn how to <u>Enable Join Before Host</u> or <u>How to use the Host Key</u>
- **Captions:** <u>Disability Resource Center</u> | <u>drc-info@email.arizona.edu</u>
- For help with encrypted local recordings: Please contact your local IT group for guidance.