

Person Centred Virtual Visiting User Guide

Zoom guide for staff – making calls on a patient’s device

About this guide

This guide is intended to assist with the process of using any device other than the Person Centred Virtual Visiting (PCVV) iPad to make video calls using Zoom.

Who is this guide for?

This guide is for NHS staff who will be helping patients use Zoom to make video calls to family members using the patient’s own device. This will most likely be a smartphone, tablet or laptop.

What does Zoom do?

Zoom is an app that enables a patient to have video and/or audio calls with family and friends. Zoom refers to these calls as “meetings”. It works on tablets, iPads, smart phones, laptops and PCs, and on different systems like Windows, Apple Mac, and Android.

One person - the meeting “host” - starts the call, and then invites others to attend.

The free version of Zoom includes:

- Unlimited (i.e. no time limit on length of call) 1-2-1 meetings
- For meetings of 3 or more people, the call is limited to **40 minutes** (but you can hang up at 39 minutes and start a new call if needed). Up to 100 people can join a call.
- No limit on the number of meetings you can have

Setting up for the first time

Download the Zoom app to the patient’s smartphone, iPad or tablet:

- Find Zoom in the device’s app store and click on the download option
- Follow on-screen download instructions

- Once downloaded, you will see the Zoom icon on the device:



Create a Zoom account:

To maintain privacy, a Zoom account must be created independently by the patient and they must have an email address that they can access. If they are unable to do this, then you should use the ward iPad to make the call.

To create an account, the patient will need to complete the following steps:

- Open the Zoom app and click the **Sign Up** option at the bottom of the screen
- Enter date of birth
- Enter email address (and name, if requested at this stage)
- Click the **Sign Up** option
- Zoom will then send a verification email to the patient's email address
- The patient must log into his or her email account, find the email from Zoom, and click on 'activate account'
- Click 'No' if asked if signing up for a school
- Enter first name, last name, and create a password
- Select "Skip This Step" at the next screen inviting you to email others
- The final page confirms the account has been set up and invites you to join a meeting. Close this page without clicking further. The patient will need his or her email address and Zoom password to start any calls, unless he or she chooses to stay signed in to the Zoom app

Zoom does have an advanced meeting scheduling feature but to keep things simple, we recommend you just follow the procedure in this guide.

Now check the following:

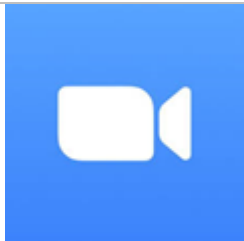

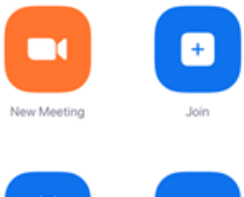
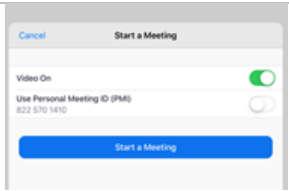
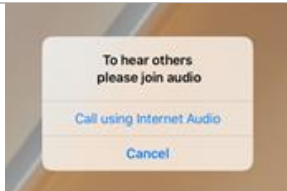
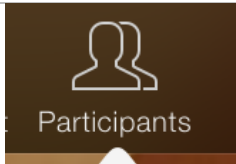
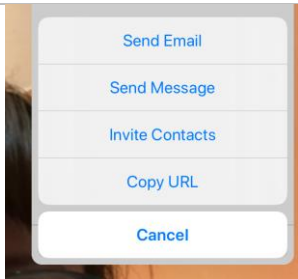
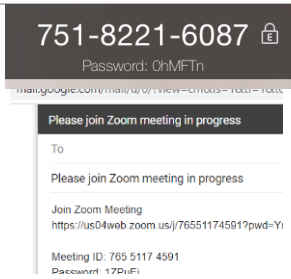
Unlike the PCVV iPads, you may be able to use the **Invite** feature within Zoom because it will link to the text messaging option on your patient's smartphone, or the default personal email address on a tablet or iPad. This will send meeting details and/or a URL link to the patient's chosen contacts, which they use to join. Alternatively, you can follow the guidance for Zoom on the PCVV iPads, which advises you to share the meeting ID/password by phoning or texting relatives outwith Zoom.

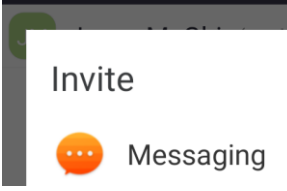
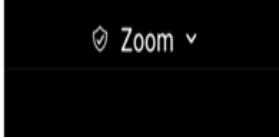


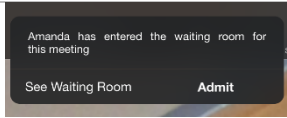
NB meeting details **should not be shared in a public place**: e.g. posted on a Facebook page. This is to prevent unwanted participants joining.

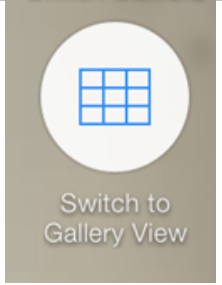

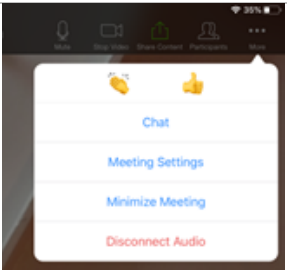
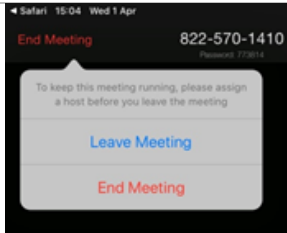
Remember, different devices will have different audio and video options. Whether you are using a tablet, iPad or smartphone, Zoom needs permissions to access video and/or audio options, make sure you agree to these settings so that you can be heard/seen in the call.

How to make a call ('host' a meeting)

NB these screenshots will vary depending on the patient's device

1. Open the Zoom app on the device.		2. If you see ' Sign in ', at the bottom of the screen, click it. Enter the patient's Zoom account details when prompted. If you don't see 'Sign In', go to next step.	
3. Select New Meeting .		4. Select Start a Meeting .	
5. Select the Internet audio or Device audio option if prompted. You should be able to see yourself on screen.		6. You have two options for inviting others to join the call. Option 1: tap the Participants icon on screen and then select Invite from the menu.	
7. The Invite options can include sending a message (i.e. a text message from a phone) or an email to relatives with the joining details. The options you see will depend on the patient's device.		8. If you select the Send Email option, an email will pop up with the meeting details and a URL. In the "To" field, fill in the email address of the person you want to invite and click Send.	

<p>9. If you're using a smartphone, you can select the Messaging icon from the Invite menu and Zoom will send a text message with a URL for the recipient to click on. Type the name or the phone number of the person you want to invite in the To field and send the text.</p>		<p>10. Option 2: Find the Meeting ID and password. If using a Smartphone, tap the screen once and 'Zoom' should appear at the top of the screen. Tap 'Zoom' once and the meeting ID and password should display. Tap screen once more to get back to meeting screen.</p> <p>If using a laptop, click the 'i' button at top left of screen and the password and meeting ID will be displayed in a pop-up box. To close the box, click anywhere else on the screen.</p>	 
<p>11. Share the meeting ID & password by an appropriate method with the other people taking part in the call: e.g. a text or a phone call.</p>		<p>12. Wait for the participants to join. You should get an onscreen prompt when someone is ready to join. Click Admit for each one.</p>	

<p>13. Switch to the Gallery view (top of screen) to see everyone on screen. You should be able to see and/or hear everyone as they join. NB you might not see this option on a smartphone.</p>		<p>14. Having problems with audio or video? On some devices you can click or tap your screen to see the audio/video options and click on them to make changes: e.g. join with computer/device audio if you didn't receive a prompt when joining</p>	
<p>15. Other options include in-call chat and emojis. Click ... More in the top right to view these.</p>		<p>16. To end the call, select End Meeting. You're done!</p>	

Troubleshooting

Getting Started guides are available at <https://support.zoom.us/>.

If you require any further information or help, please email:

library.network@ggc.scot.nhs.uk