

Welcome to today's webinar

BEST ZOOM PRACTICES AND HOW TO USE
ZOOM FOR ONLINE THERAPY

Lincoln Wachtel & Tauseef Mohammad

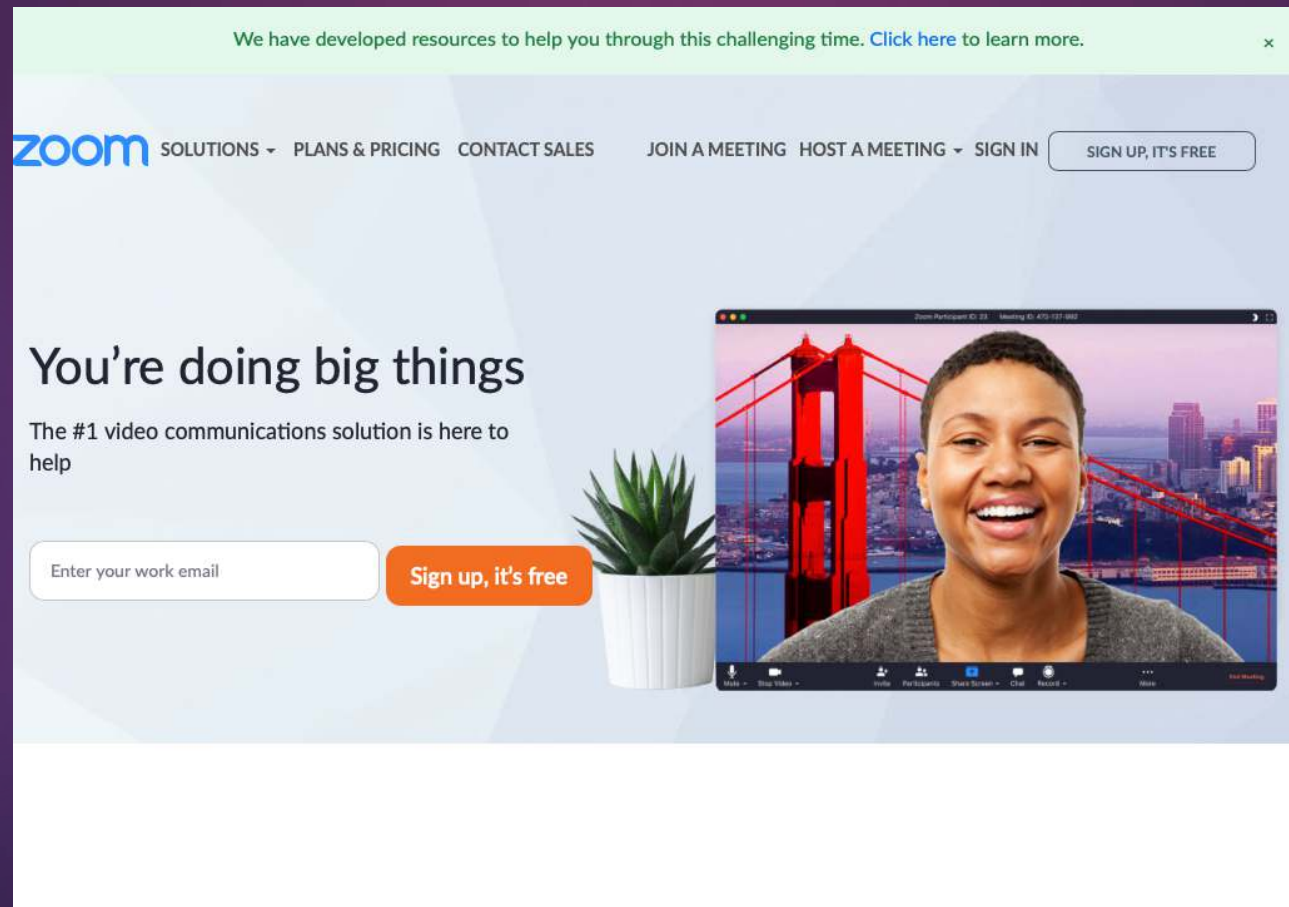
*The Couples Institute &
The Developmental Model of Couples Therapy*

What we plan to cover today

- ▶ Unprecedented times
- ▶ During our last free webinar most of the questions we received were about using Zoom
- ▶ Basics of Zoom
- ▶ Navigating the Zoom app, logging in and accessing settings
- ▶ Improving your user experience and best practices
- ▶ How to videos
- ▶ Other video conferencing options
- ▶ Questions and answers

Getting Started

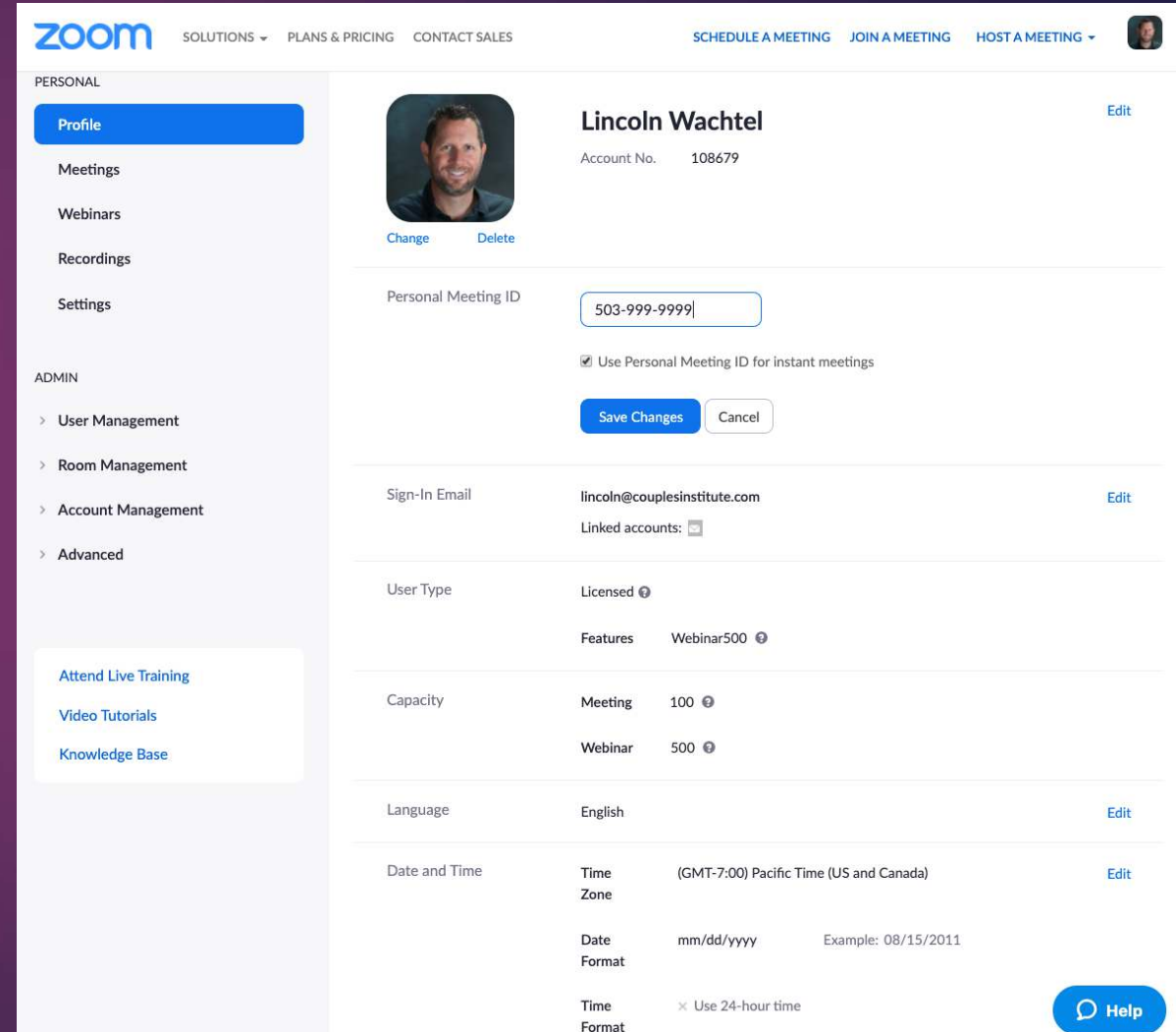
- Create you own account <https://zoom.us/>



Profile

► Personal ID

► You can share this link with anyone for instant mtgs



The screenshot shows the Zoom account profile page for Lincoln Wachtel. The page is divided into a left sidebar and a main content area. The sidebar has a 'PERSONAL' section with 'Profile' selected, and an 'ADMIN' section with options like 'User Management', 'Room Management', 'Account Management', and 'Advanced'. Below the sidebar are links for 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area shows the user's profile information, including a profile picture, name, account number, and a 'Personal Meeting ID' field with a '503-999-9999' value. There are 'Save Changes' and 'Cancel' buttons. Below this, there are sections for 'Sign-In Email', 'User Type', 'Capacity', 'Language', and 'Date and Time', each with an 'Edit' link. The 'Date and Time' section includes fields for 'Time Zone', 'Date Format', and 'Time Format'.

zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING ▾

PERSONAL

Profile Meetings Webinars Recordings Settings

ADMIN

- > User Management
- > Room Management
- > Account Management
- > Advanced

[Attend Live Training](#)
[Video Tutorials](#)
[Knowledge Base](#)

Lincoln Wachtel [Edit](#)

Account No. 108679

[Change](#) [Delete](#)

Personal Meeting ID

☒ Use Personal Meeting ID for instant meetings

[Save Changes](#) [Cancel](#)

Sign-In Email [lincoln@couplesinstitute.com](#) [Edit](#)

Linked accounts:

User Type [Licensed](#)

Features [Webinar500](#)

Capacity [Meeting 100](#) [Webinar 500](#)

Language [English](#) [Edit](#)

Date and Time [Time Zone \(GMT-7:00\) Pacific Time \(US and Canada\)](#) [Edit](#)

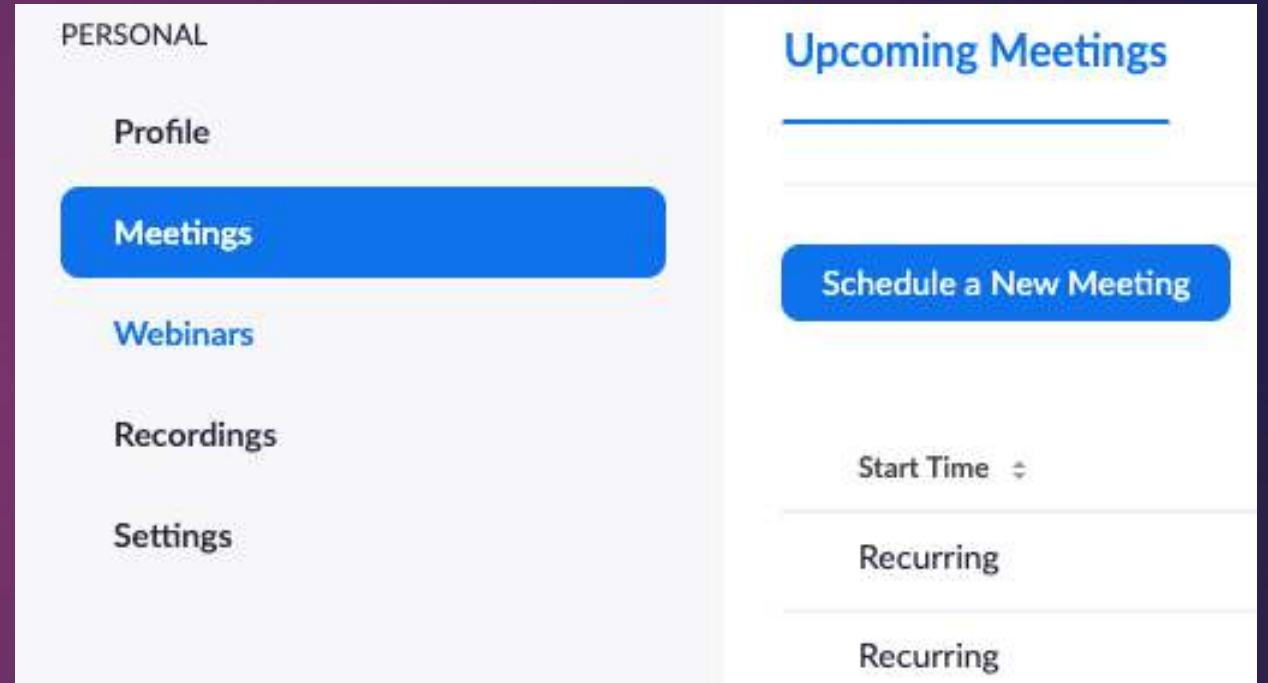
[Date Format mm/dd/yyyy](#) [Example: 08/15/2011](#)

[Time Format](#) [× Use 24-hour time](#)

[Help](#)

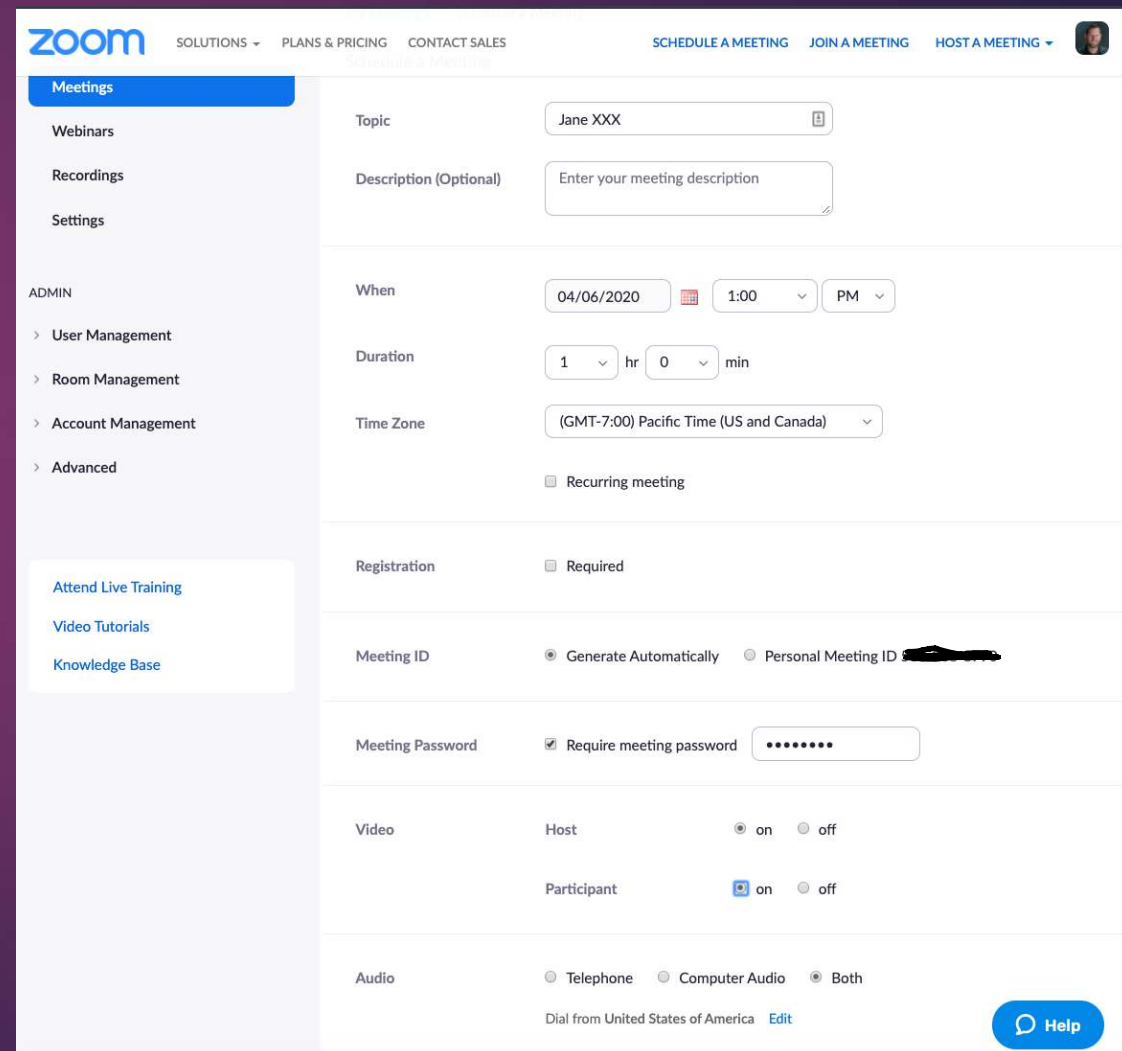
Meetings

- ▶ Where you go to set up your mtgs
- ▶ See Blue Box “Schedule a New Meeting”



Meetings Pt 2

- ▶ Set Set date, time, duration, time zone
- ▶ Set recurring mtgs for the same client
- ▶ Can choose to Generate Automatically or use Personal Meeting ID
- ▶ Choose Generate Automatically for individual link only person or people with that link they can join
- ▶ Can require a meeting password



The screenshot shows the Zoom 'Schedule a Meeting' page. The left sidebar contains navigation links: Meetings (selected), Webinars, Recordings, and Settings. Below these are ADMIN links: User Management, Room Management, Account Management, and Advanced. Further down are links for Attend Live Training, Video Tutorials, and Knowledge Base. The main content area is titled 'Schedule a Meeting' and includes the following fields:

- Topic:** Jane XXX
- Description (Optional):** Enter your meeting description
- When:** 04/06/2020, 1:00 PM
- Duration:** 1 hr 0 min
- Time Zone:** (GMT-7:00) Pacific Time (US and Canada)
- Recurring meeting:** ☐
- Registration:** ☐ Required
- Meeting ID:** ☒ Generate Automatically ☐ Personal Meeting ID [redacted]
- Meeting Password:** ☒ Require meeting password [password field]
- Video:** Host: ☒ on ☐ off; Participant: ☒ on ☐ off
- Audio:** ☐ Telephone ☐ Computer Audio ☒ Both

At the bottom, it says 'Dial from United States of America' with an 'Edit' link, and a 'Help' button is in the bottom right corner.

Webinars

- ▶ For setting up webinars like these

PERSONAL

Profile

Meetings

Webinars

Recordings

Settings

Recordings

- ▶ Where you will find your recordings
- ▶ Red light blinks while recording
- ▶ Share these via email
- ▶ Can store on your computer
- ▶ Can store in the cloud
- ▶ Limited editing ability

PERSONAL

Profile

Meetings

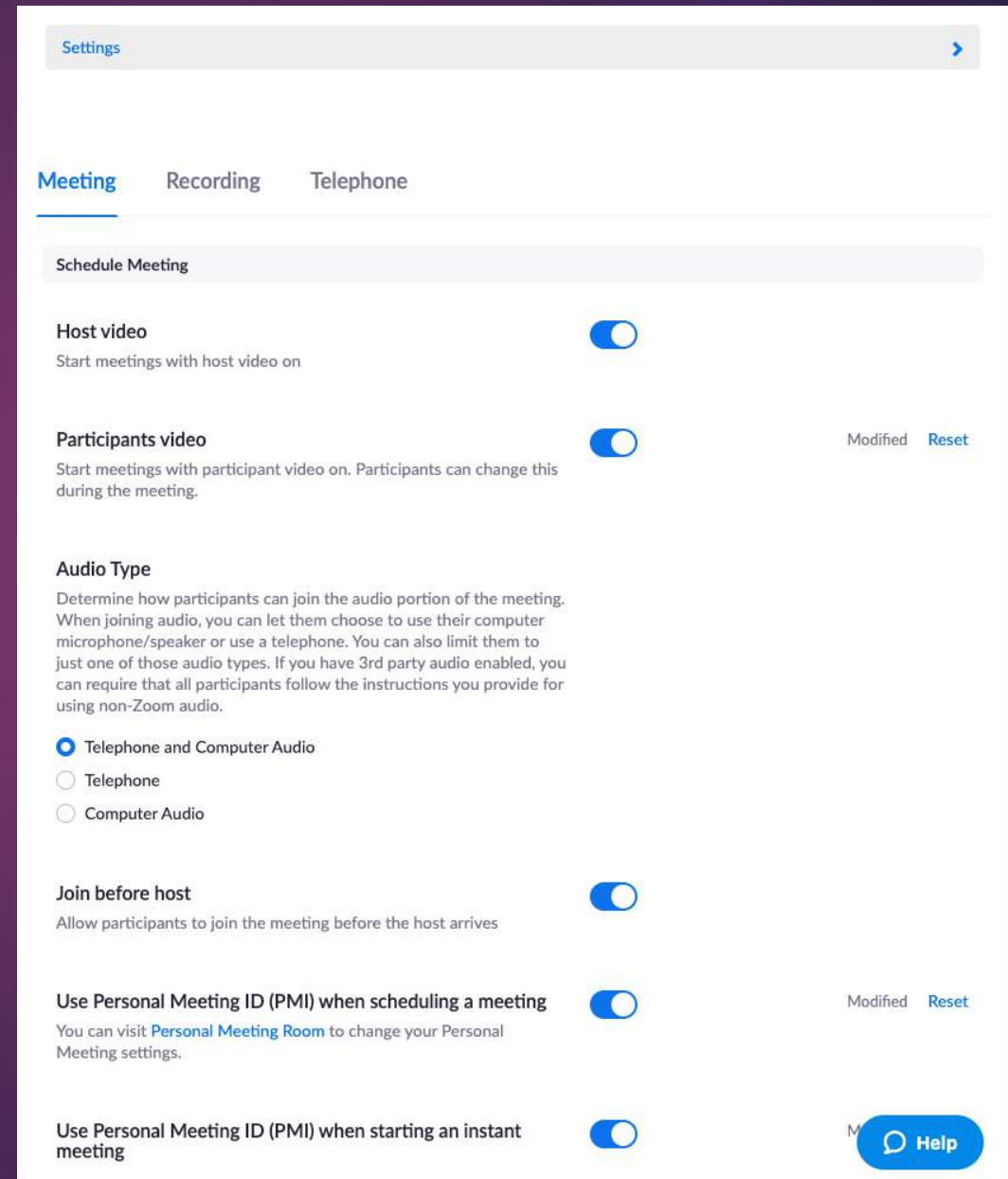
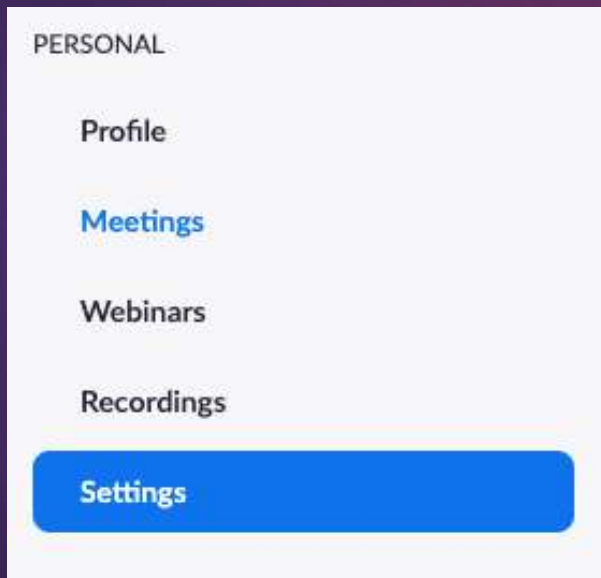
Webinars

Recordings

Settings

Settings

- ▶ Long list of options to choose
- ▶ Review and choose your preferences



Under ADMIN, Advanced, Security

► Options on how to set your passwords

PERSONAL

Profile

Meetings

Webinars

Recordings

Settings

ADMIN

> User Management

> Room Management

> Account Management

< Advanced

App Marketplace

H.323/SIP Room Connector

Meeting Connector

Branding

Security

Security

Authentication

Basic Password Requirement

☒ Minimum of 8 characters

☒ Cannot contain only one character (e.g. "111111" or "aaaaaa")

☒ Cannot contain only consecutive characters (e.g. "123456" or "abcdef")

☒ Have at least 1 letter (a, b, c...)

☒ Have at least 1 number (1, 2, 3...)

☒ Include both Upper case and Lower case characters

Enhanced Password Rules

☐ Have a minimum password length

☐ Have at least 1 special character (!, @, #...)

☐ New users need to change their passwords upon first sign-in

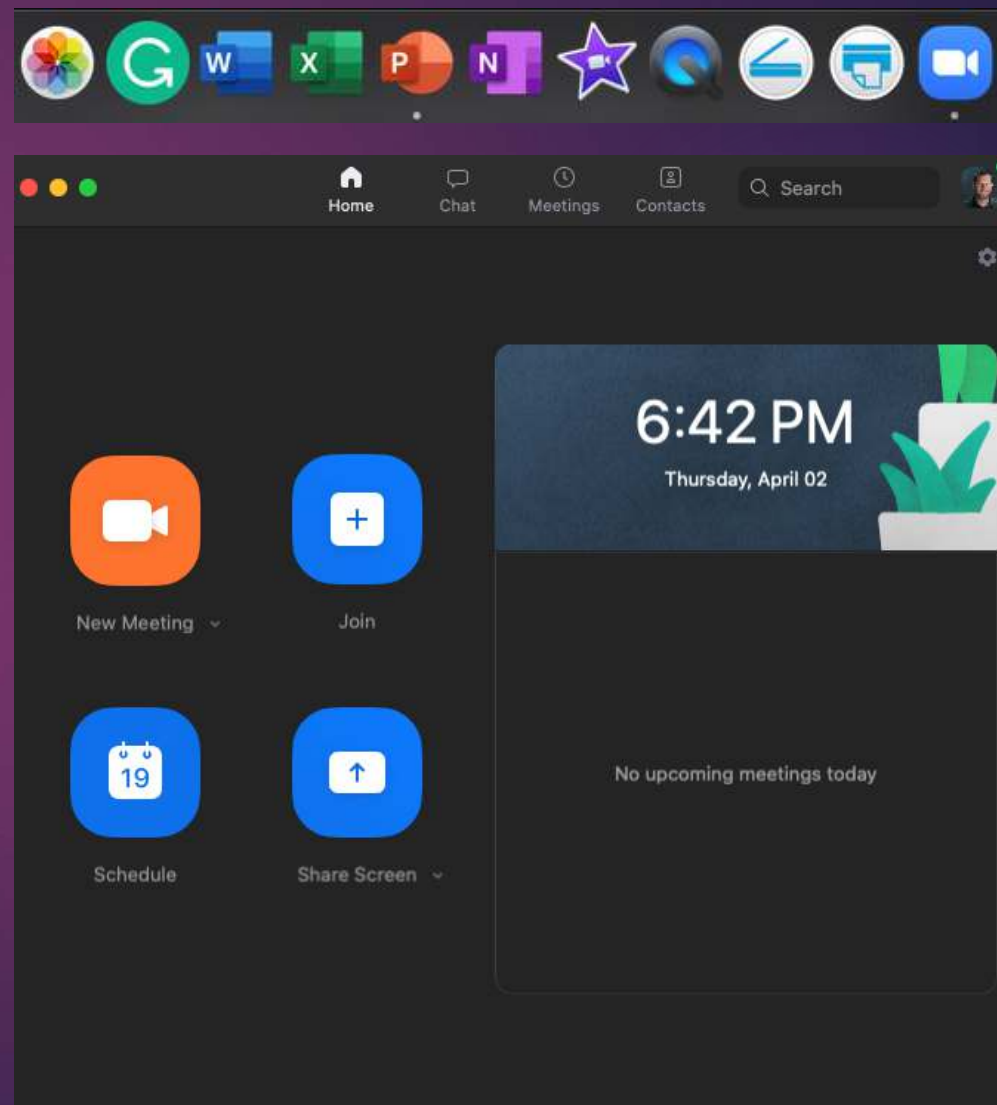
☐ Password expires automatically and needs to be changed after the specified number of days

☐ Users cannot reuse any password used in the previous number of times

☐ Users can change their password a maximum number of times every 24 hours

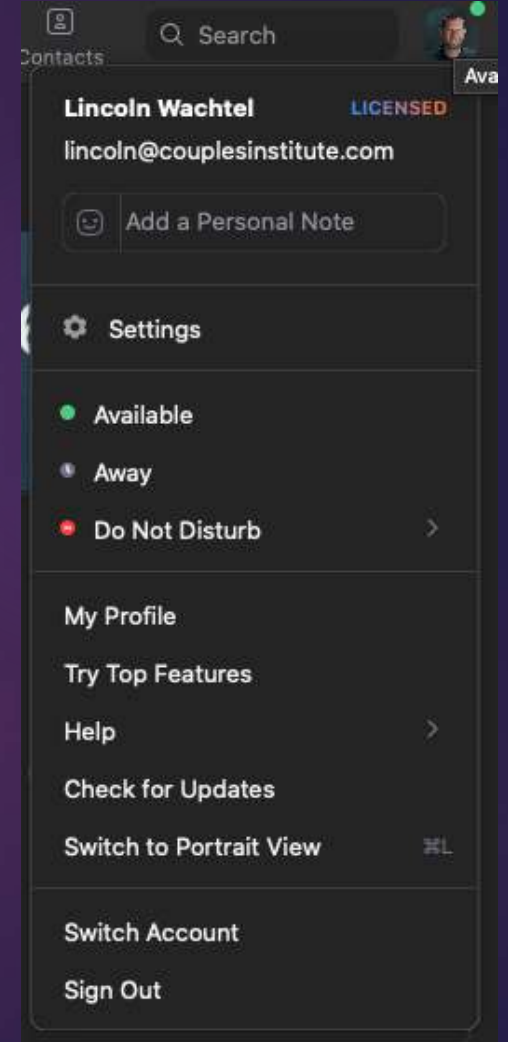
Download Zoom app on computer

- ▶ Open application from dock
 - ▶ New Meeting
 - ▶ Join a mtg *
 - ▶ Schedule
 - ▶ Share Screen

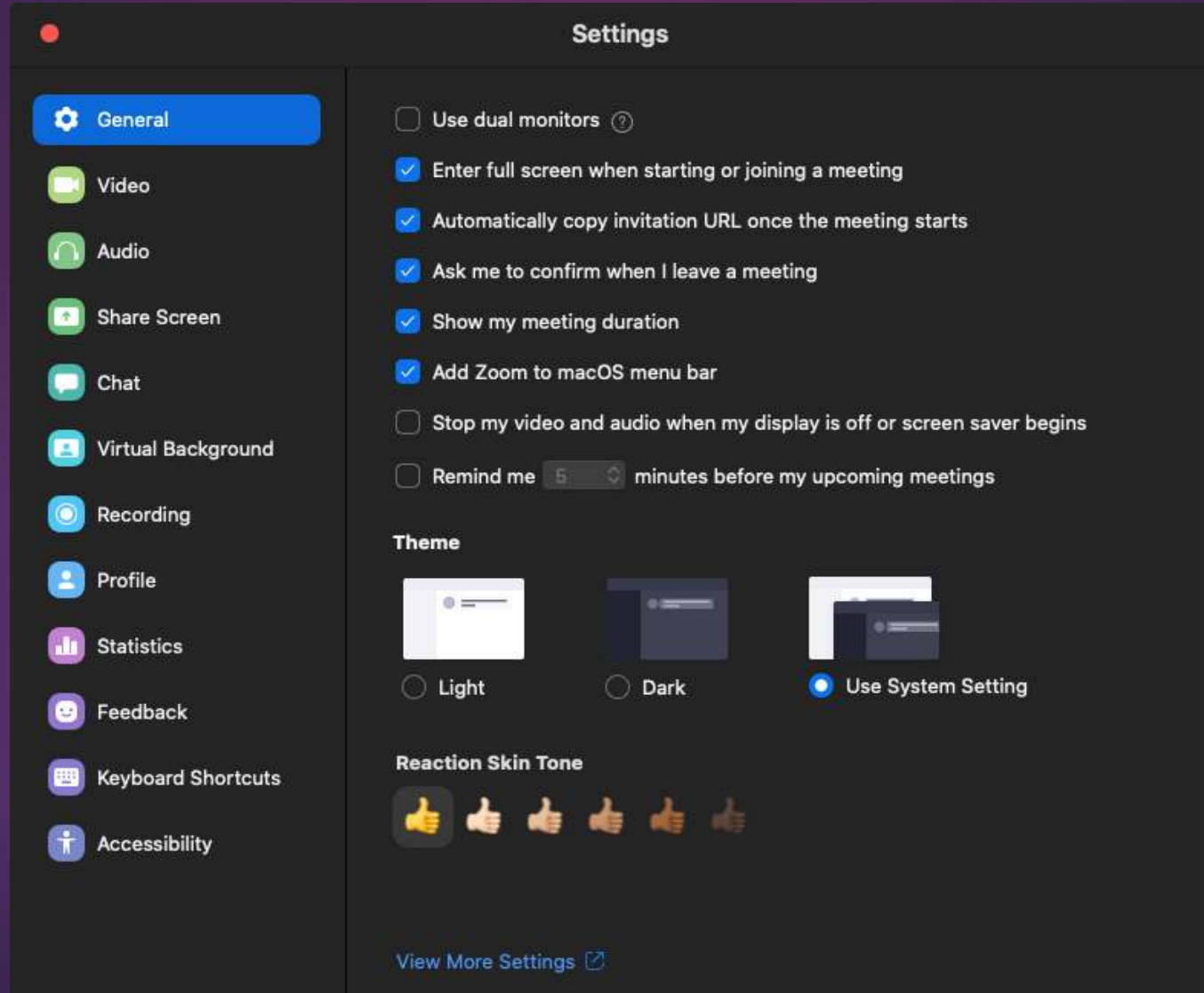


Zoom app

- ▶ Top right is your profile
- ▶ Sign in
- ▶ Key items here is Settings and Check for Updates



Settings



Settings Video

- ▶ Enable HD
- ▶ Touch up
- ▶ Options

Camera: Display iSight

☒ 16:9 (Widescreen) ☐ Original ratio

My Video: ☒ Enable HD

☐ Mirror my video

☒ Touch up my appearance

Meetings: ☒ Always display participant name on their videos

☐ Turn off my video when joining a meeting

☐ Always show video preview dialog when joining a video meeting

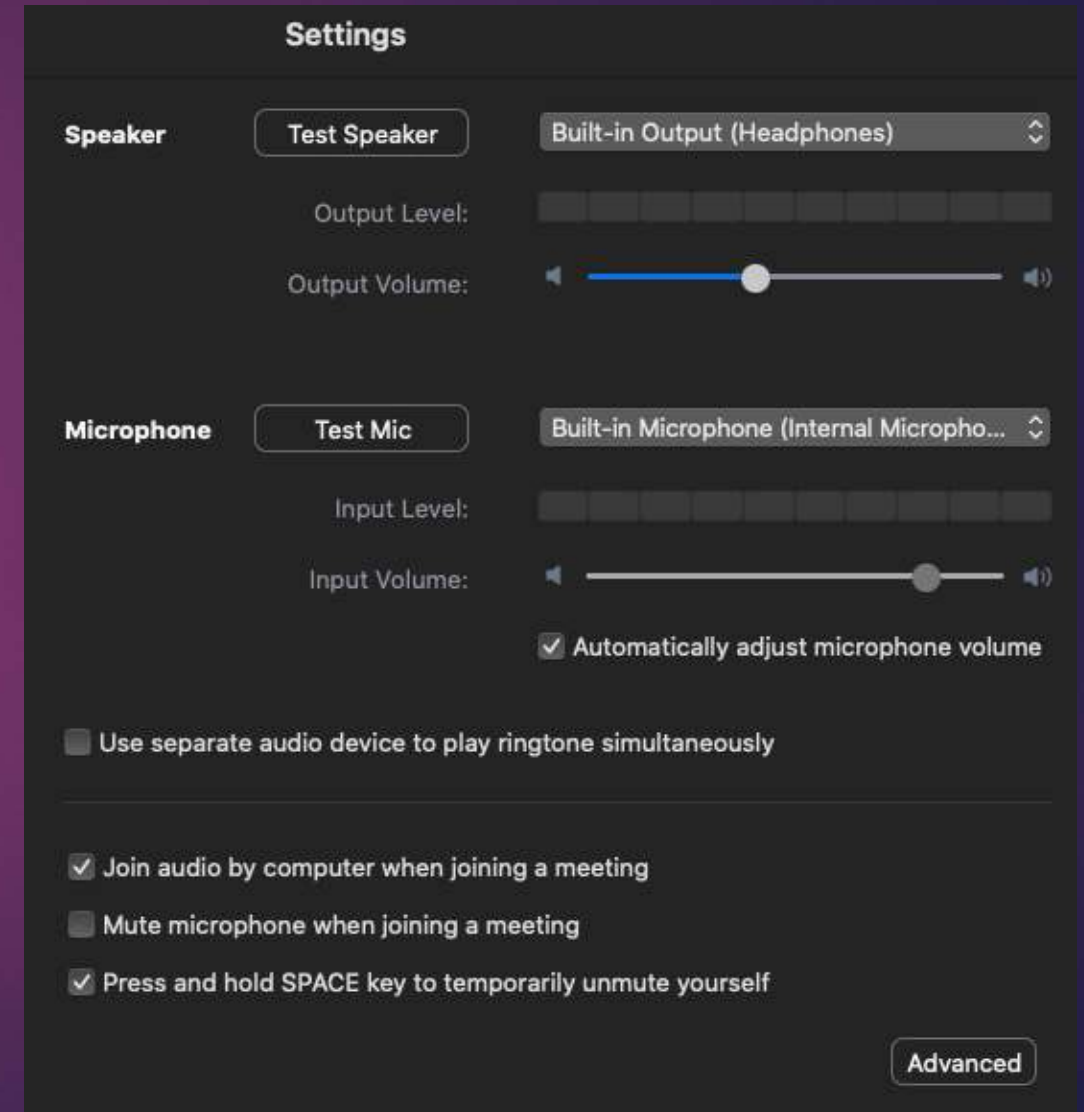
☐ Hide non-video participants

☒ Spotlight my video when speaking

☒ Display up to 49 participants per screen in Gallery View

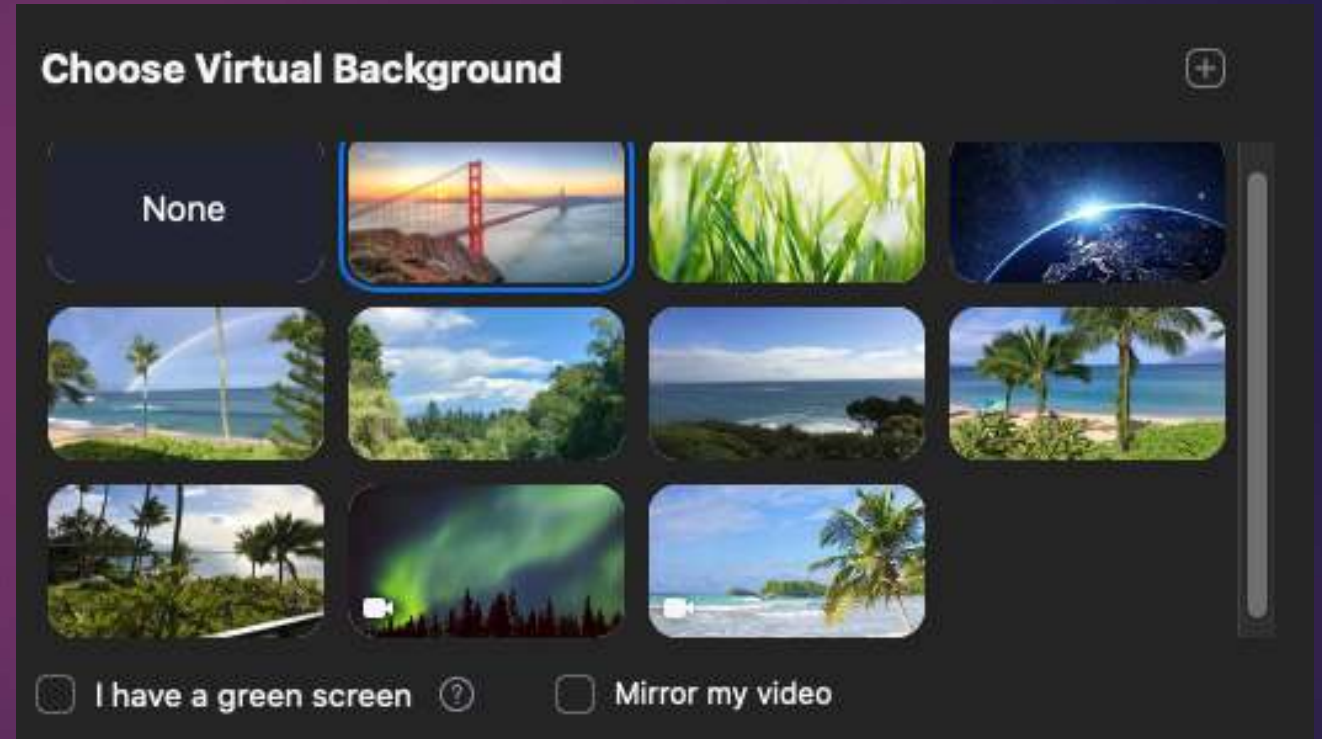
Settings Audio

- ▶ Test Speakers
- ▶ Test Mic
- ▶ Add headphones, ear buds
- ▶ Audio issues go here!



Settings Virtual Background

- ▶ Choose
- ▶ Add with plus button
- ▶ Video options
- ▶ Green Screen
- ▶ Mirror Screen
- ▶ None



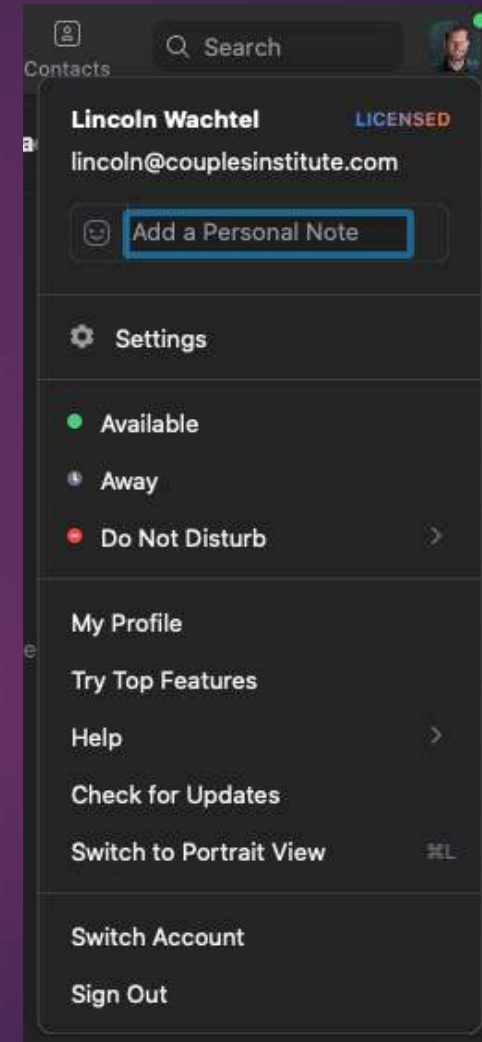
Profile Check for Updates

- ▶ Check regularly
- ▶ Also update your computer

You are up to date

You are on the latest version 4.6.9 (19273.0402). [Release notes](#)

Done



User Experience while in a meeting

- ▶ Mute
- ▶ Stop Video
- ▶ Choose Background and switch cameras
- ▶ Invite
- ▶ Manage Participants – rename, mute, video, REMOVE
- ▶ Polling
- ▶ Screen Share
- ▶ Chat
- ▶ Record
- ▶ Breakout Rooms
- ▶ Reactions-Thumbs up, clap
- ▶ More-FB Live, You Tube
- ▶ End Meeting



User Experience while in a meeting

▶ Speaker View or Gallery View?

User Experience

- ▶ Add an external camera
- ▶ Use headphones
- ▶ Add a background

Zoom Etiquette

- ▶ Mute when there is background noise
- ▶ Turn off camera when appropriate
- ▶ Check yourself in the mirror before you join
- ▶ Check your background
- ▶ Turn off ringers and notifications
- ▶ Turn off alarms
- ▶ Pay attention
- ▶ Ask for a break if needed

User Experience

- ▶ Zoom is an internet-based platform and competes for bandwidth
- ▶ Close out all other programs like email, Skype, and especially web browsers

User Experience

- ▶ Plug into an ethernet cable if possible
- ▶ Sit near your modem if using wi-fi
- ▶ Be aware of other devices being used

For Your Clients

- ▶ Walk them through the Zoom technology
- ▶ Share best practices if they have not used Zoom
- ▶ Suggest they download the Zoom app
- ▶ Set them up with their own unique link with password

How to Videos

- ▶ Google is your friend 😊
- ▶ Joining a meeting
<https://youtu.be/hIkCmbvAHQQ>
- ▶ Scheduling a Meeting with Zoom
<https://youtu.be/XhZW3iyXV9U>
- ▶ Host and Co-Host Controls in a Meeting
https://youtu.be/ygZ96J_z4AY

How to Videos

- ▶ Recording a Zoom Meeting
<https://www.youtube.com/embed/IZHSAMd89JE?>
- ▶ Joining & Configuring Audio & Video
<https://youtu.be/-s76QHshQnY>
- ▶ Sharing Your Screen
<https://youtu.be/YA6SGQIVmcA>

How to Videos from Zoom

- ▶ Support from Zoom during the COVID-19 pandemic
 - ▶ Daily Demos
 - ▶ Blogs
 - ▶ Tutorials
 - ▶ Training sessions

<https://zoom.us/docs/en-us/covid19.html>

Telehealth during COVID-19

- ▶ A covered health care provider that wants to use audio or video communication technology to provide telehealth to patients during the COVID-19 nationwide public health emergency can use any non-public facing remote communication product that is available to communicate with patients. OCR is exercising its enforcement discretion to not impose penalties for noncompliance with the HIPAA Rules in connection with the good faith provision of telehealth using such non-public facing audio or video communication products during the COVID-19 nationwide public health emergency. This exercise of discretion applies to telehealth provided for any reason, regardless of whether the telehealth service is related to the diagnosis and treatment of health conditions related to COVID-19.

Telehealth during COVID-19

- ▶ For example, a covered health care provider in the exercise of their professional judgement may request to examine a patient exhibiting COVID- 19 symptoms, using a video chat application connecting the provider's or patient's phone or desktop computer in order to assess a greater number of patients while limiting the risk of infection of other persons who would be exposed from an in-person consultation. Likewise, a covered health care provider may provide similar telehealth services in the exercise of their professional judgment to assess or treat any other medical condition, even if not related to COVID-19, such as a sprained ankle, dental consultation or psychological evaluation, or other conditions.

Telehealth during COVID-19

- ▶ Under this Notice, covered health care providers may use popular applications that allow for video chats, including Apple FaceTime, Facebook Messenger video chat, Google Hangouts video, Zoom, or Skype, to provide telehealth without risk that OCR might seek to impose a penalty for noncompliance with the HIPAA Rules related to the good faith provision of telehealth during the COVID-19 nationwide public health emergency. Providers are encouraged to notify patients that these third-party applications potentially introduce privacy risks, and providers should enable all available encryption and privacy modes when using such applications.

Telehealth during COVID-19

- ▶ Under this Notice, however, Facebook Live, Twitch, TikTok, and similar video communication applications are public facing, and should not be used in the provision of telehealth by covered health care providers.

Recent concerns about Zoom

- ▶ They have had tremendous growth during the COVID-19 pandemic
- ▶ We have been working with them for 3 years and they have had excellent customer service
- ▶ We are continuing to track and monitor developments
- ▶ They posted the info below on their website a couple days ago:
 - ▶ Zoom does not sell user's data
 - ▶ Zoom has never sold user data in the past and has no intention of selling users' data going forward
 - ▶ Zoom does not monitor your meetings or its contents
 - ▶ Zoom complies with all applicable privacy laws, rules, and regulations in the jurisdictions within which it operates, including the GDPR in the CC PA

Other video conferencing options

- ▶ Zoom Health Care Plan
- ▶ Theranest
- ▶ Simple Practice
- ▶ Doxy.me
- ▶ VSee

Questions and Answers

- ▶ Use the raise your hand feature and we can invite you to join us live with your video on