



## HIPAA Compliant Video Conferencing Software

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## **Purpose**

This training material highlights how to use Zoom video conferencing software that is HIPAA Compliant.

## **Audience**

This training material is designed for University faculty, staff, and students that will be using HIPAA Zoom video conferencing software.

# Getting Started

Zoom is a video conference service. It allows users to conduct live, multi-person video conferences from any video-enabled device with Internet access that is now HIPAA Compliant. *Note: Recommended browsers for use with Zoom are Firefox, Chrome, or Safari.*

## Requesting a HIPAA account

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1. Complete a Service Request form from the umHelpdesk system [for a HIPAA Account Request](#). From the umHelpdesk site go to: **Software & Applications > Zoom Video Conferencing > Zoom HIPAA Access Request**. Fill out the form and you will receive an email. Log out of your memphis.zoom.us account, then click **I Acknowledge and Switch**.

**By accepting this invitation, you are switching to a new Zoom account**

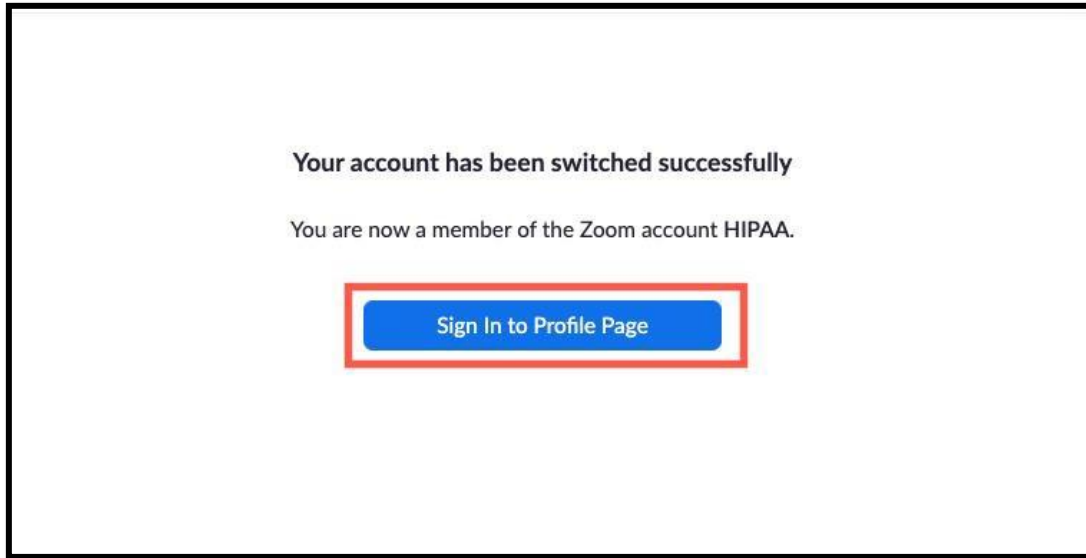
Before you switch, be aware of the following:

- After you switch, you can still access your own data, such as your meetings and recordings.
- Your role in the new account will be "member". This role might have fewer privileges than your role in your current account.
- Your new account might not provide access to all of the features you have in your current account.

**I Acknowledge and Switch**

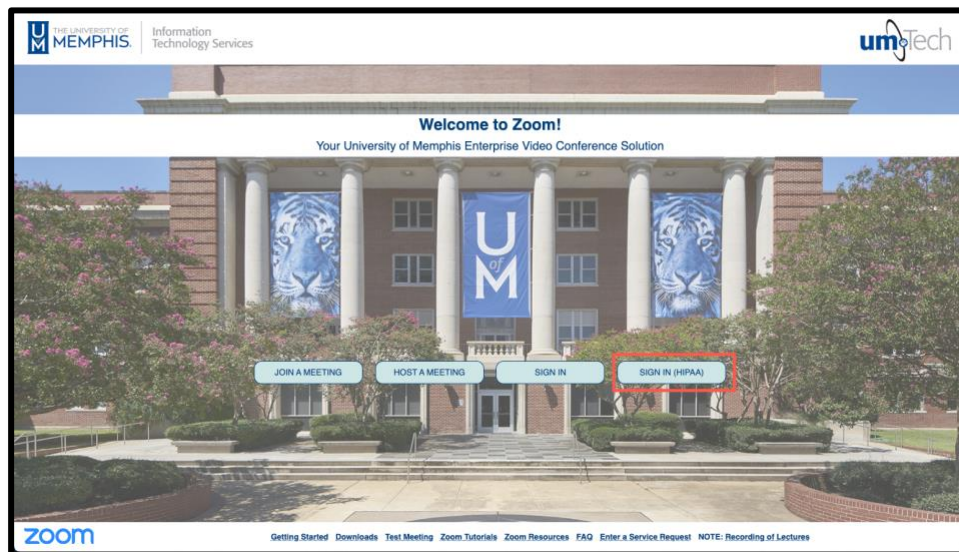
Sign into Your Current Account

2. Once you have successfully signed in and switched over, you will receive the following and will receive an email.



## Signing into the HIPAA Web Portal

1. Log out of your memphis.zoom.us account.
2. [Sign into your account at the UofM HIPAA Zoom site](https://memphis-edu-hipaa.zoom.us) using your UUID and UofM credentials. (<https://memphis-edu-hipaa.zoom.us>) From here your Zoom HIPAA account will look and behave just like a regular zoom account.  
*Note: When you want to log back into your regular Zoom account, logout of the Zoom HIPAA and log back into memphis.zoom.us.*



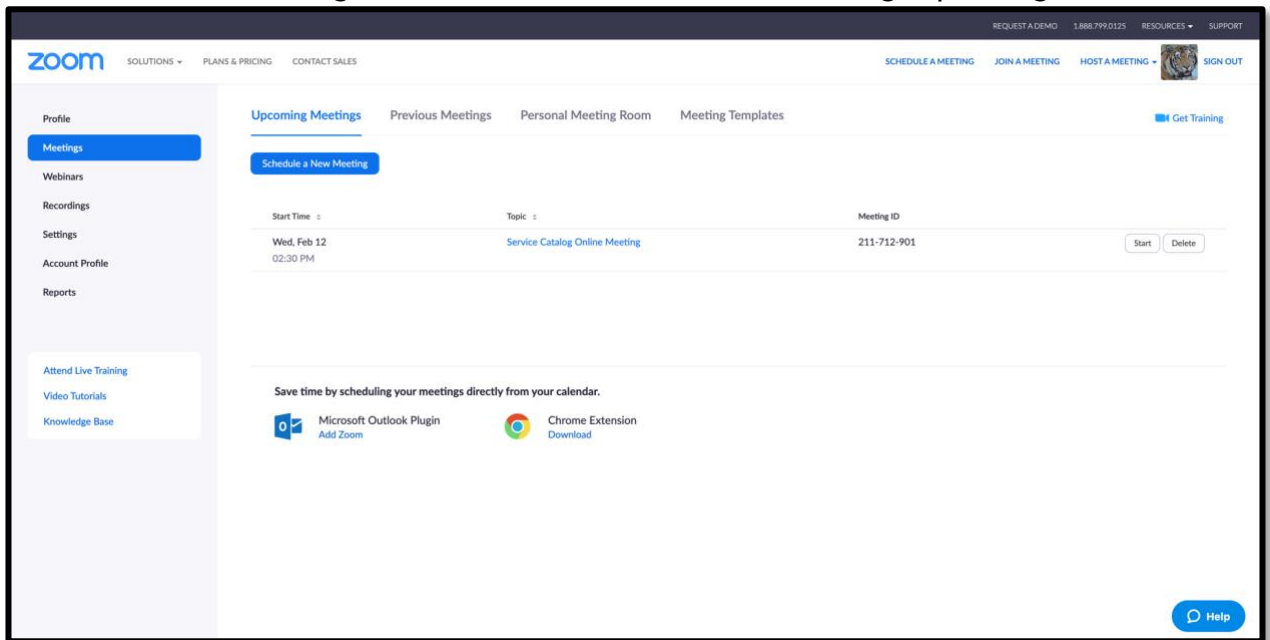
3. Zoom uses your UUID, the first part of your University of Memphis email address (UUID@memphis.edu) and associated password. Click Login.

4. Authenticate using DUO.



The image shows a Duo authentication interface. On the left is the University of Memphis logo and links for "What is this?" and "Need help?". On the right, there is a "Device:" dropdown menu set to "ios". Below this, it says "Choose an authentication method". There are two options: "Duo Push" with a "Send Me a Push" button, and "Passcode" with an "Enter a Passcode" button. At the bottom, there is a checkbox labeled "Remember me for 7 days".

5. You will see this landing screen that contains a list of meetings upon Login.

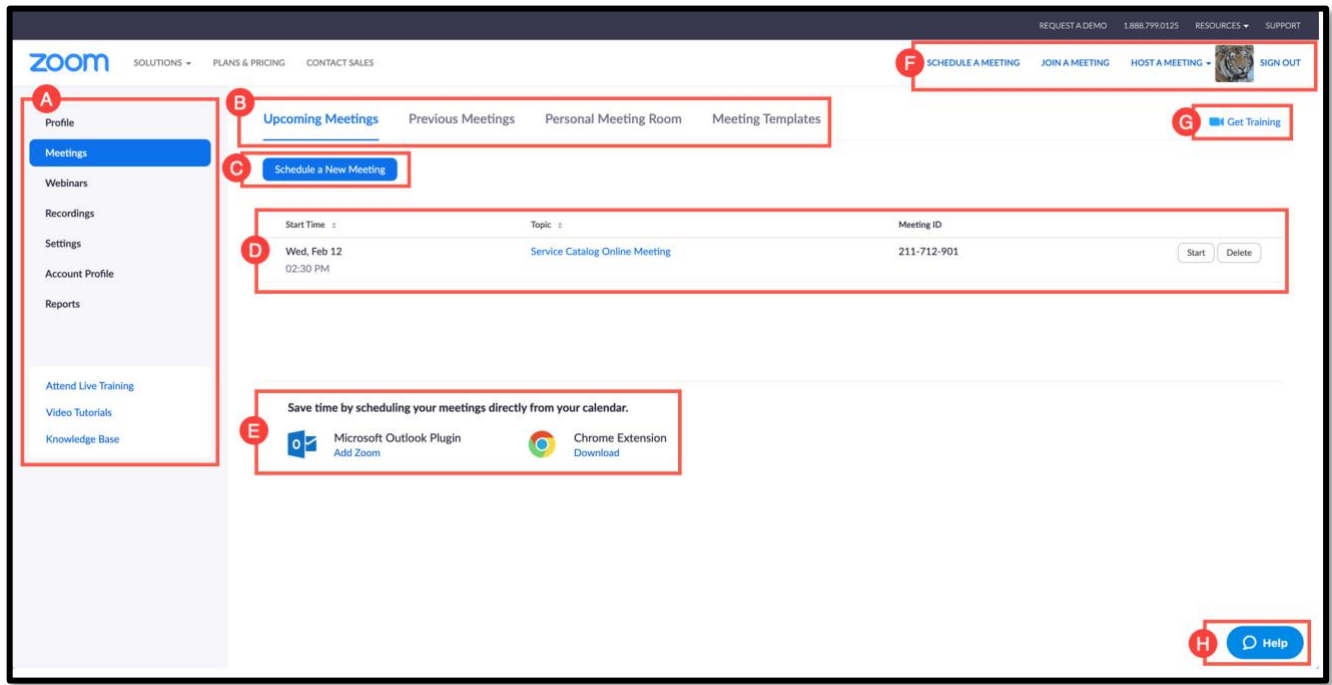


The image shows the Zoom web interface. The top navigation bar includes links for "SOLUTIONS", "PLANS & PRICING", "CONTACT SALES", "REQUEST A DEMO", "1.888.799.0125", "RESOURCES", "SUPPORT", "SCHEDULE A MEETING", "JOIN A MEETING", "HOST A MEETING", and "SIGN OUT". The left sidebar contains links for "Profile", "Meetings" (highlighted), "Webinars", "Recordings", "Settings", "Account Profile", "Reports", "Attend Live Training", "Video Tutorials", and "Knowledge Base". The main content area has tabs for "Upcoming Meetings", "Previous Meetings", "Personal Meeting Room", and "Meeting Templates". Under "Upcoming Meetings", there is a "Schedule a New Meeting" button and a table with one meeting entry:

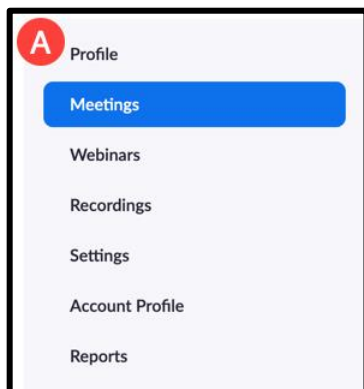
Start Time	Topic	Meeting ID	
Wed, Feb 12 02:30 PM	Service Catalog Online Meeting	211-712-901	<button>Start</button> <button>Delete</button>

Below the table, there is a section titled "Save time by scheduling your meetings directly from your calendar." with two links: "Microsoft Outlook Plugin Add Zoom" and "Chrome Extension Download". A "Help" button is located in the bottom right corner.

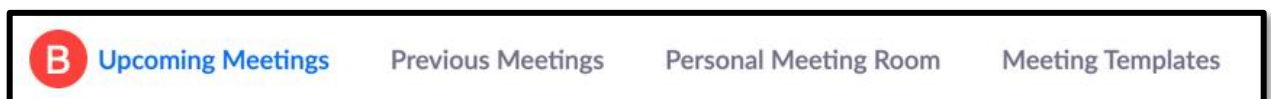
## 6. Parts of the Landing Page:



- A) Review your Profile, Webinars, Recordings, Settings, Account Profile, Reports, Attend live training, Watch video tutorials or explore the Knowledge Base.

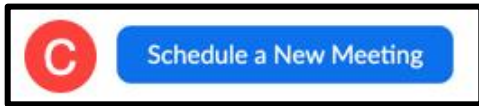


- B) View Upcoming or Previous Meetings, your Personal Meeting Room, and Meeting Templates.





C) Click to Schedule a new meeting.



D) A list of upcoming meetings will appear in this area.



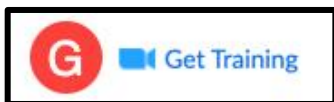
E) You can save time by scheduling your meetings directly from your calendar using the Microsoft Outlook Plugin or the Chrome Extension.



F) From here you have the option to Schedule, Join, Host a Meeting or Sign Out.



G) This is a link to Video Training.

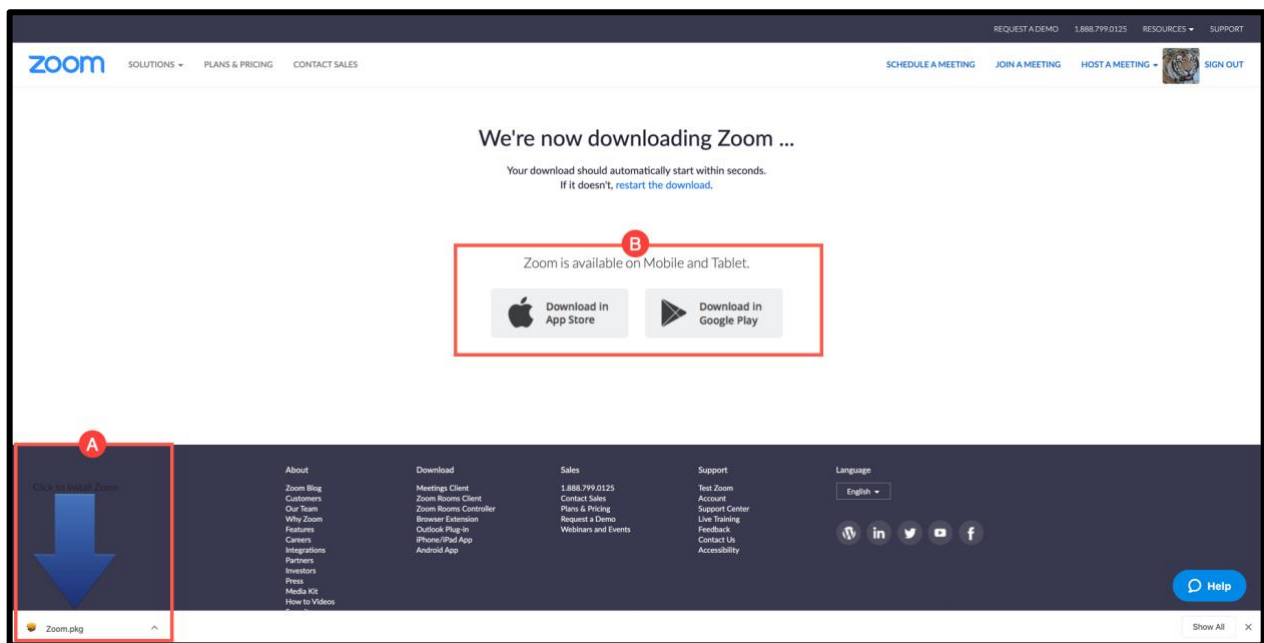


H) This is a link to the Help section of Zoom.

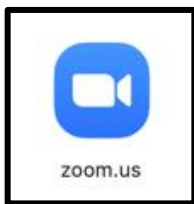


## Downloading Zoom Client

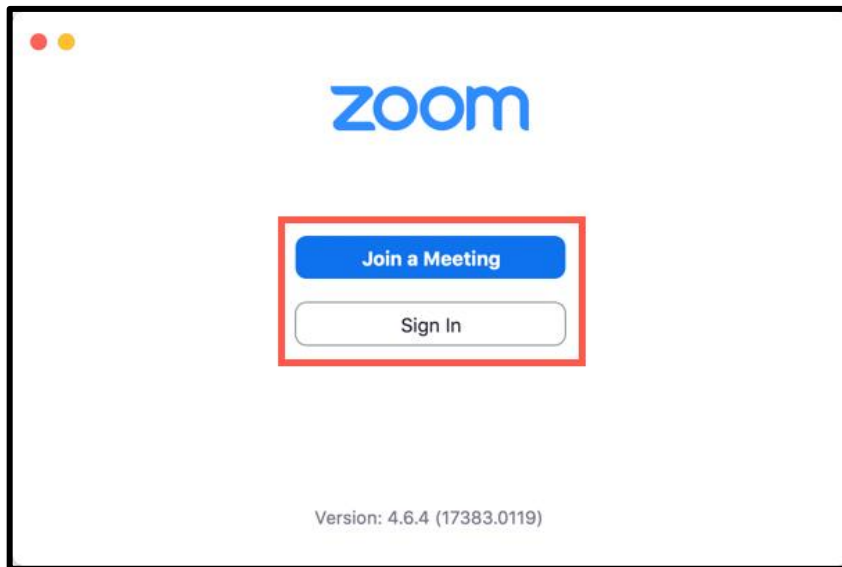
Go to <https://zoom.us/support/download> the desktop client should automatically download to your computer. **A)** On a Mac, you will see a .pkg file and on a Windows OS system you will see a .exe file in your Downloads folder. **B)** From here, you may also download the IOS Client (also available in Apple Store) and Tablet Client (also available in Google Play Store).



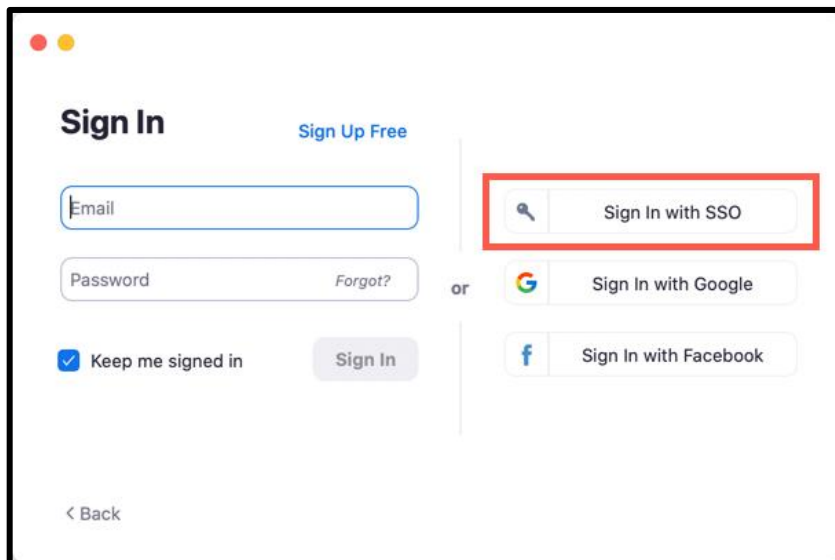
1. Once the .exe (PC) or .dmg (MAC) file is downloaded double click to install.
2. Double click the Zoom Application to open the Desktop Client.



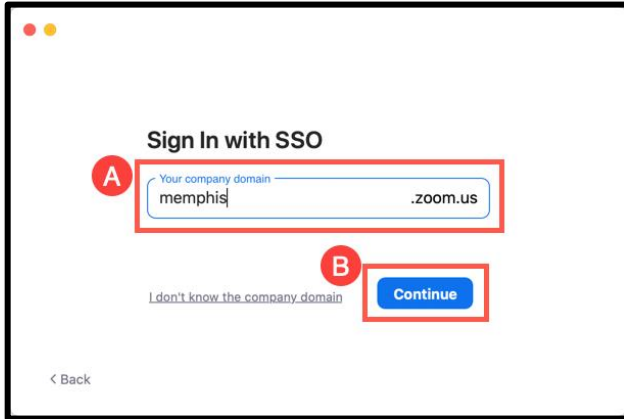
3. Once the Zoom Application or Zoom Client for Meetings is installed, click the Sign In button to sign in or Join a Meeting to join an existing meeting.



4. Select **Sign In with SSO**.



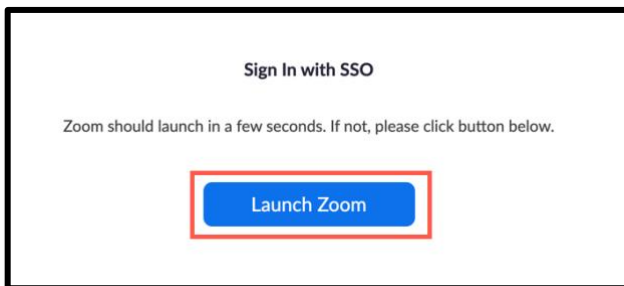
5. A) In Your Company Domain enter “memphis-edu-hipaa”, B) click Continue.



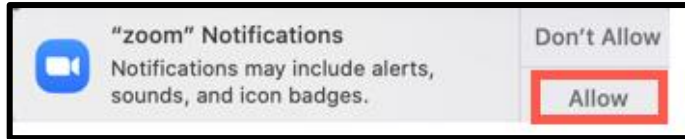
6. Authenticate using DUO.



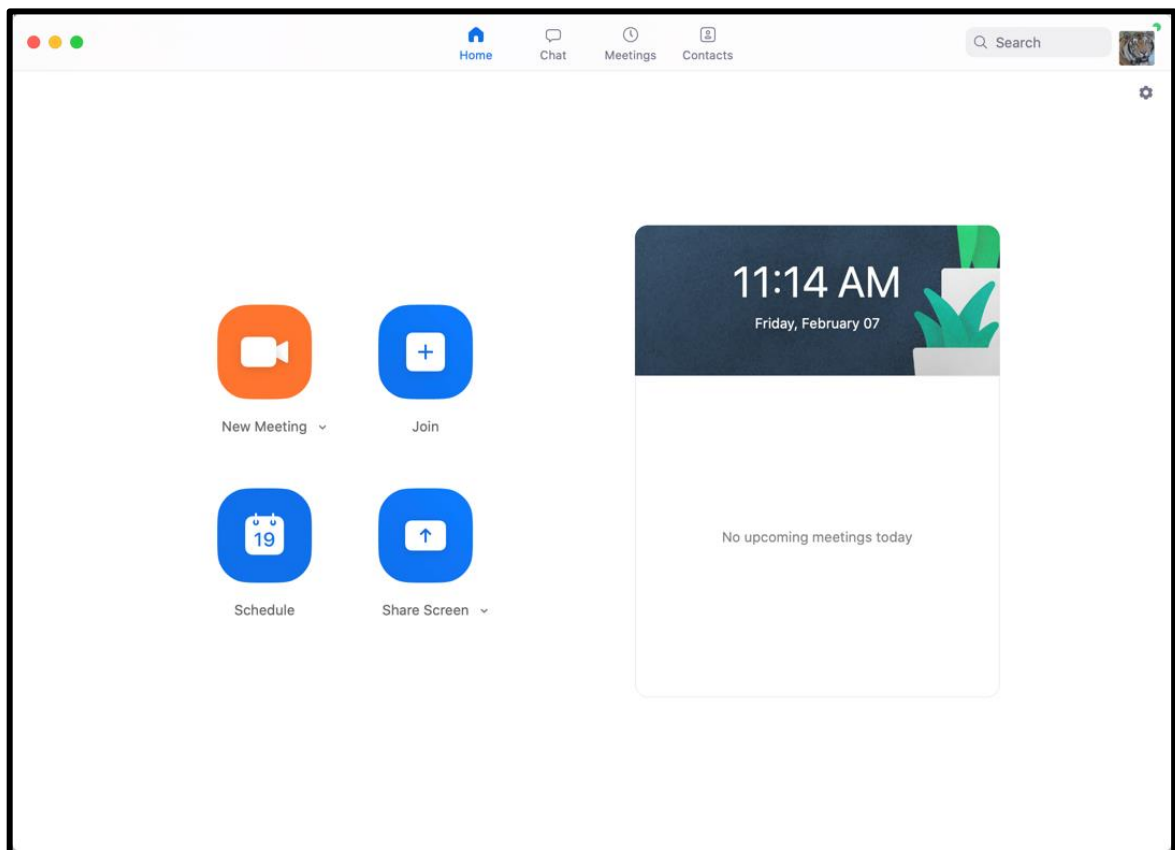
7. On the Sign in with SSO screen select Launch Zoom.



8. Your Computer will ask if you would like to allow Notifications. Click **Allow**.



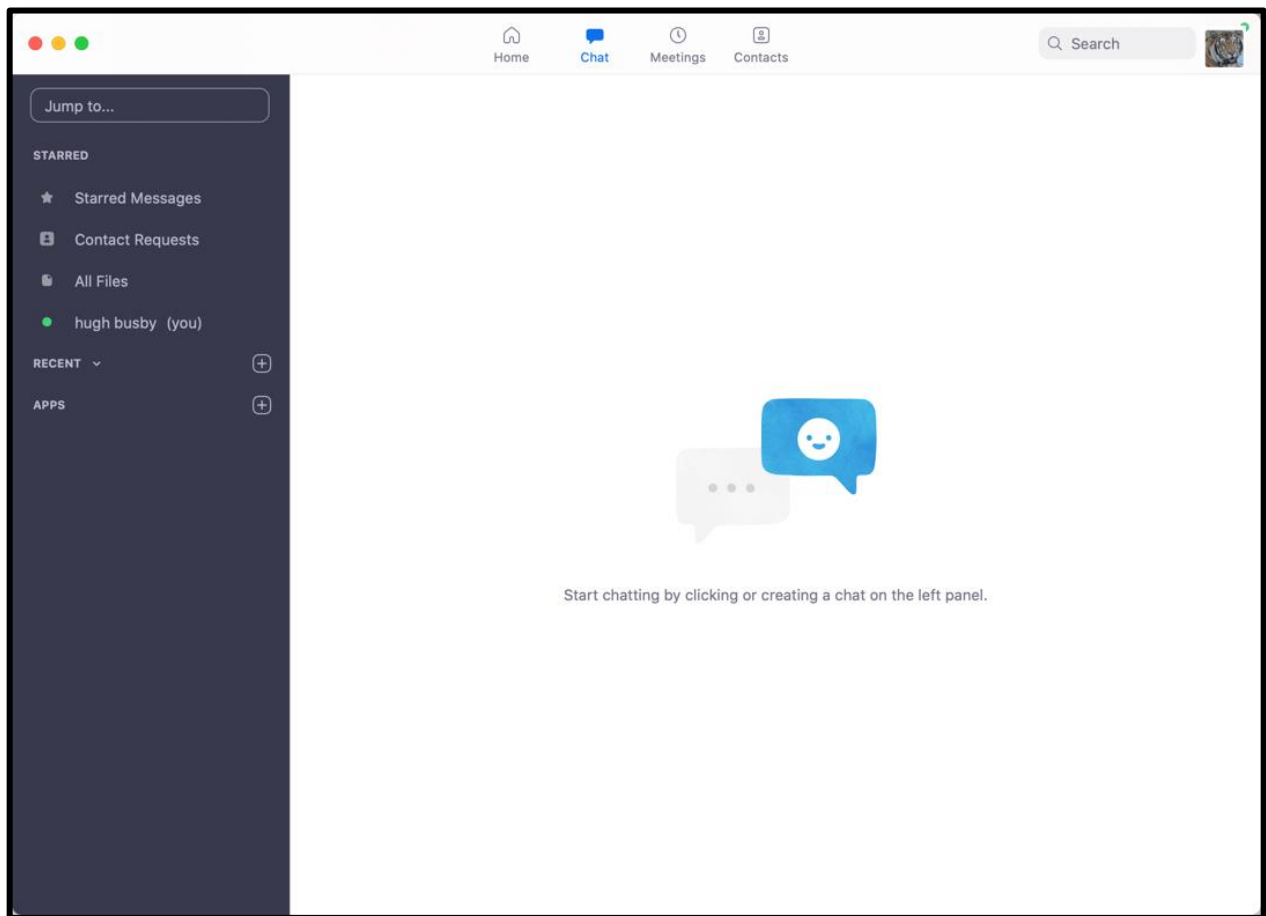
9. Once Logged in you will see the **Home Screen**. From here, you can **Schedule a Meeting**, **Join a meeting**, or **Share your Screen**.



You now have the Zoom client for Meetings installed.

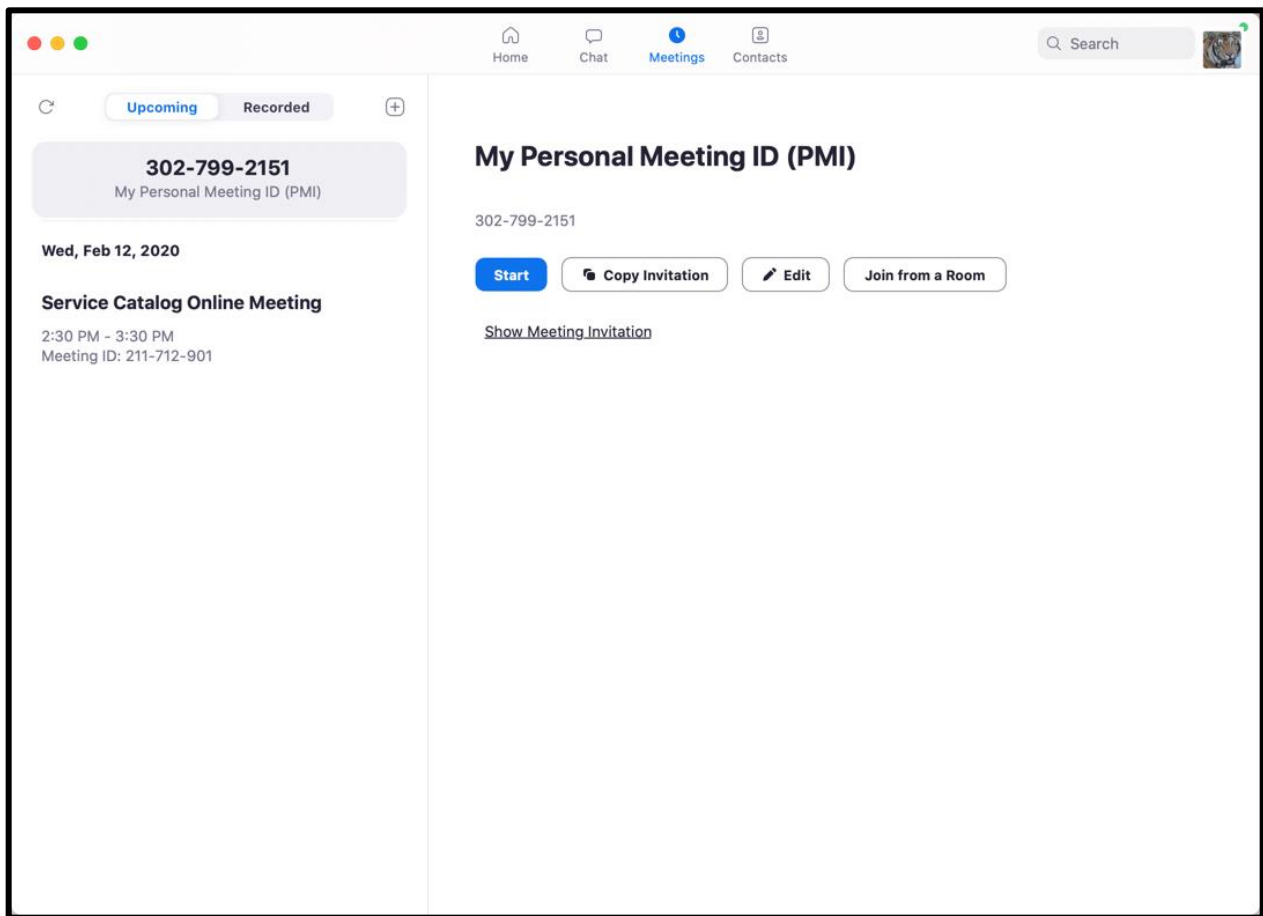
## Chat Screen

1. When in a meeting, click **Chat** to start an in-meeting message with participants in the meeting.
2. The dropdown on the chat window will allow you to message Everyone, or a specific participant.



## Meetings

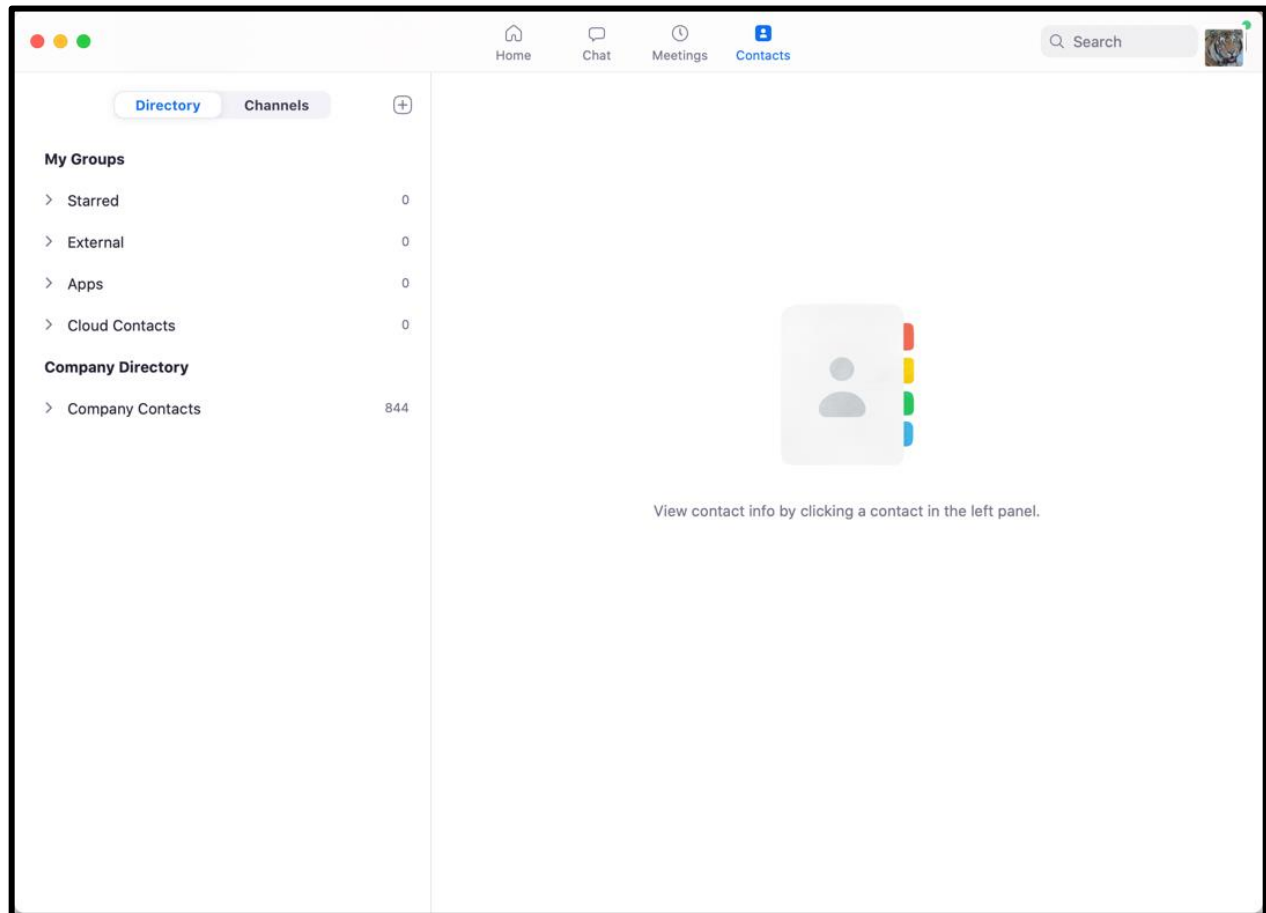
This page contains a list of your scheduled meetings. You can access Upcoming and Recorded Meetings. **PMI - Personal Meeting ID** - This tool can be used to meet with your students for virtual office hours. The meeting ID will be the same and will not change; however, it shouldn't be posted on a personal website or to the public. Please note, we also recommend using additional security features such as waiting room or password.



The screenshot displays the 'Meetings' section of the University of Memphis's IT services portal. The interface is divided into two main panels. The left panel, under the 'Upcoming' tab, lists a meeting titled 'Service Catalog Online Meeting' scheduled for Wednesday, February 12, 2020, from 2:30 PM to 3:30 PM. The meeting ID is 211-712-901. The right panel, titled 'My Personal Meeting ID (PMI)', shows the ID 302-799-2151. Below the ID are four buttons: 'Start', 'Copy Invitation', 'Edit', and 'Join from a Room'. A link labeled 'Show Meeting Invitation' is also present. The top navigation bar includes links for Home, Chat, Meetings (which is active), and Contacts, along with a search bar and a user profile icon.

## Contacts

Contains access to your contact list in Zoom.





# Scheduling Meetings

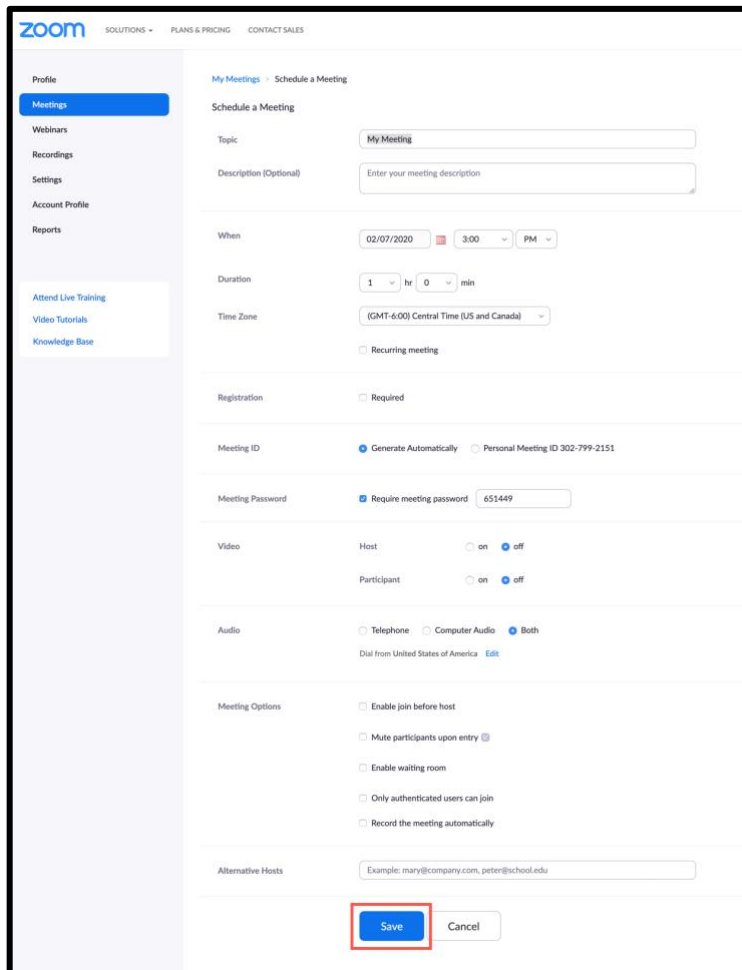
Zoom offers you several ways to schedule your meetings. If you're using Google calendar or Outlook, installing plug-in or extension makes it easy and efficient.

## Web Portal

1. [First, sign into your account, at the UofM Zoom site.](#)
2. Click "Schedule a Meeting" in the top navigation bar



3. Input details for the meeting and click "Save"



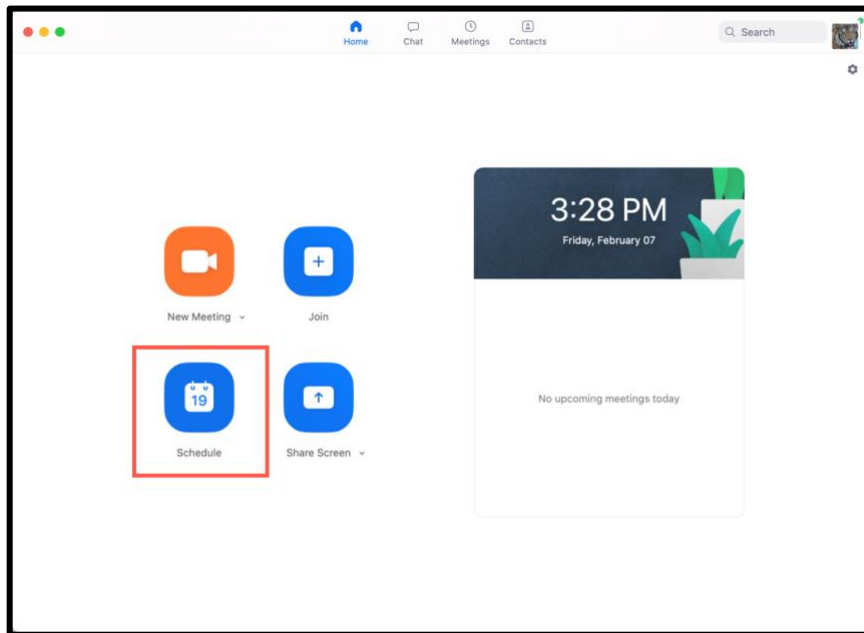
The screenshot shows the Zoom 'Schedule a Meeting' interface. On the left is a sidebar with navigation links: Profile, Meetings (selected), Webinars, Recordings, Settings, Account Profile, and Reports. Below these are links for 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area is titled 'My Meetings > Schedule a Meeting'. It contains several sections: 'Schedule a Meeting' with 'Topic' (My Meeting) and 'Description (Optional)' (Enter your meeting description); 'When' with date (02/07/2020), time (3:00), and PM; 'Duration' (1 hr, 0 min); 'Time Zone' (GMT-6:00 Central Time (US and Canada)); 'Recurring meeting' (unchecked); 'Registration' (Required, unchecked); 'Meeting ID' (Generate Automatically selected, Personal Meeting ID 302-799-2151); 'Meeting Password' (Require meeting password checked, 651449); 'Video' (Host: off, Participant: off); 'Audio' (Telephone, Computer Audio, Both - Both selected); 'Meeting Options' (Enable join before host, Mute participants upon entry, Enable waiting room, Only authenticated users can join, Record the meeting automatically - all unchecked); and 'Alternative Hosts' (Example: mary@company.com, peter@school.edu). At the bottom, the 'Save' button is highlighted with a red rectangle, next to a 'Cancel' button.

4. You can then **Add** to the URL or Invitation or add to your calendar with available plug in.

My Meetings > Manage "Service Catalog Online Meeting"	
Topic	Service Catalog Online Meeting
Time	Feb 12, 2020 02:30 PM Central Time (US and Canada)
Add to	<a href="#">31 Google Calendar</a> <a href="#">Outlook Calendar (.ics)</a> <a href="#">Yahoo Calendar</a>
Meeting ID	211-712-901
Meeting Password	✓ Require meeting password 090818
Invite Attendees	Join URL: <a href="https://memphis.zoom.us/j/211712901?pwd=eEtXV0pYOTVhV0tneEUwMGRiZU5Edz09">https://memphis.zoom.us/j/211712901?pwd=eEtXV0pYOTVhV0tneEUwMGRiZU5Edz09</a>

## Desktop Client

1. Click "Schedule" button on the Zoom App.



2. Input details for the meeting and click **Schedule**.

The screenshot shows the 'Schedule Meeting' form in Zoom. The 'Topic' field is filled with 'Zoom Meeting'. The 'Date' is set to '2/ 7/2020' from '4:00 PM' to '4:30 PM'. The 'Time Zone' is 'Central Time (US and Canada)'. The 'Recurring meeting' checkbox is unchecked. The 'Meeting ID' section has 'Generate Automatically' selected. The 'Password' section has 'Require meeting password' checked with the password '012283'. The 'Video' section has 'Host' and 'Participants' both set to 'Off'. The 'Audio' section has 'Telephone and Computer Audio' selected. The 'Calendar' section has 'iCal' selected. The 'Advanced Options' dropdown is visible. At the bottom are 'Cancel' and 'Schedule' buttons.

3. You can then copy the URL or Invitation or add to your calendar with available plug in Outlook Add-in (Web & Desktop).

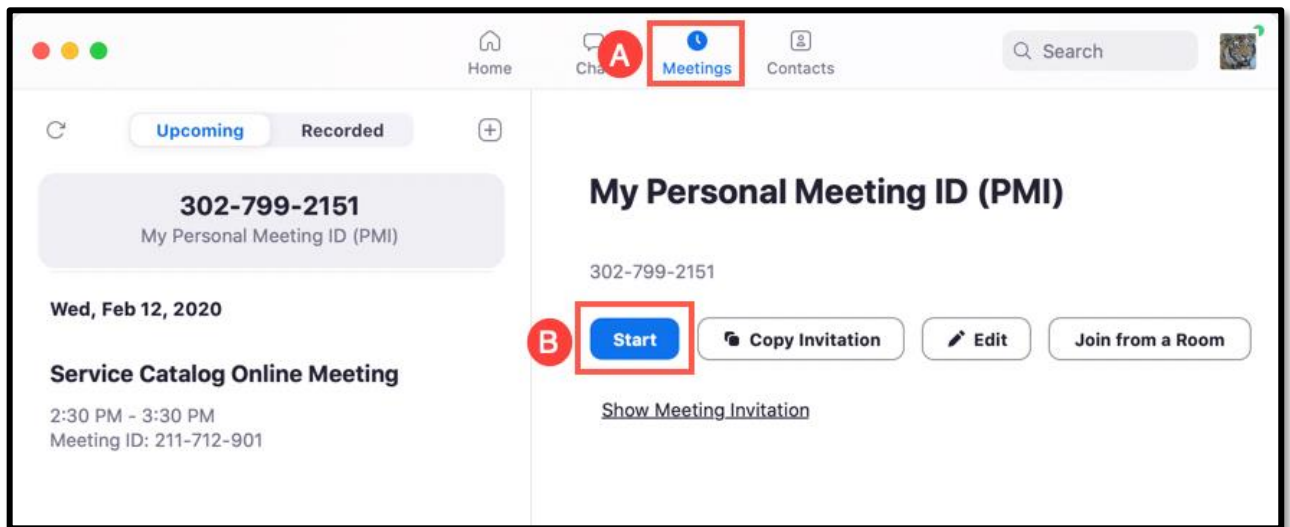
The screenshot shows the Zoom 'My Personal Meeting ID (PMI)' page. The 'Copy Invitation' button is highlighted with a red box. The page displays the meeting ID '302-799-2151' and provides options to 'Start', 'Copy Invitation', 'Edit', or 'Join from a Room'. Below this, there is a 'Hide Meeting Invitation' link and a message from 'hugh busby' inviting to a scheduled Zoom meeting. The topic is 'Personal Meeting Room'. The page also provides a link to join the Zoom meeting and the meeting ID. At the bottom, it lists dial-in numbers for mobile and landline, and a link to find the local number.

# Hosting a Meeting

## From the Desktop App

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1. A) From the top menu select **Meetings**.

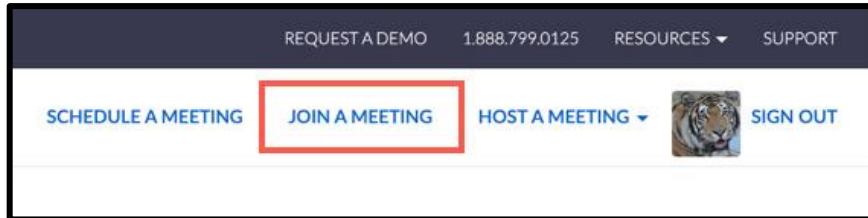


2. B) Select the meeting you want to begin and click **Start**.

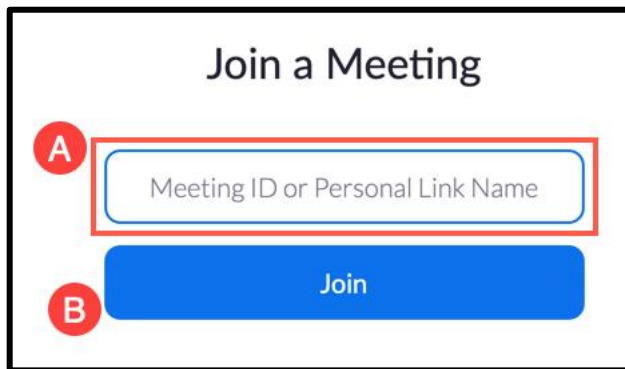
## Joining a Meeting from Web Client

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1. Click the **Join A Meeting** button to enter the Meeting Room.



2. A) Enter the meeting ID or Personal name. B) Click Join.

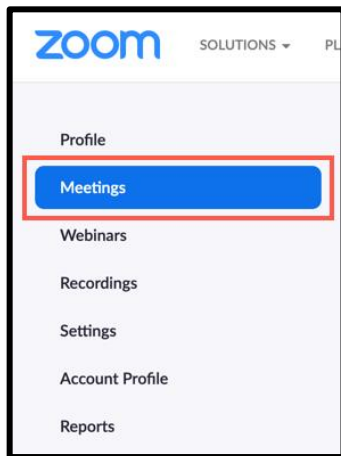


# Hosting a Meeting

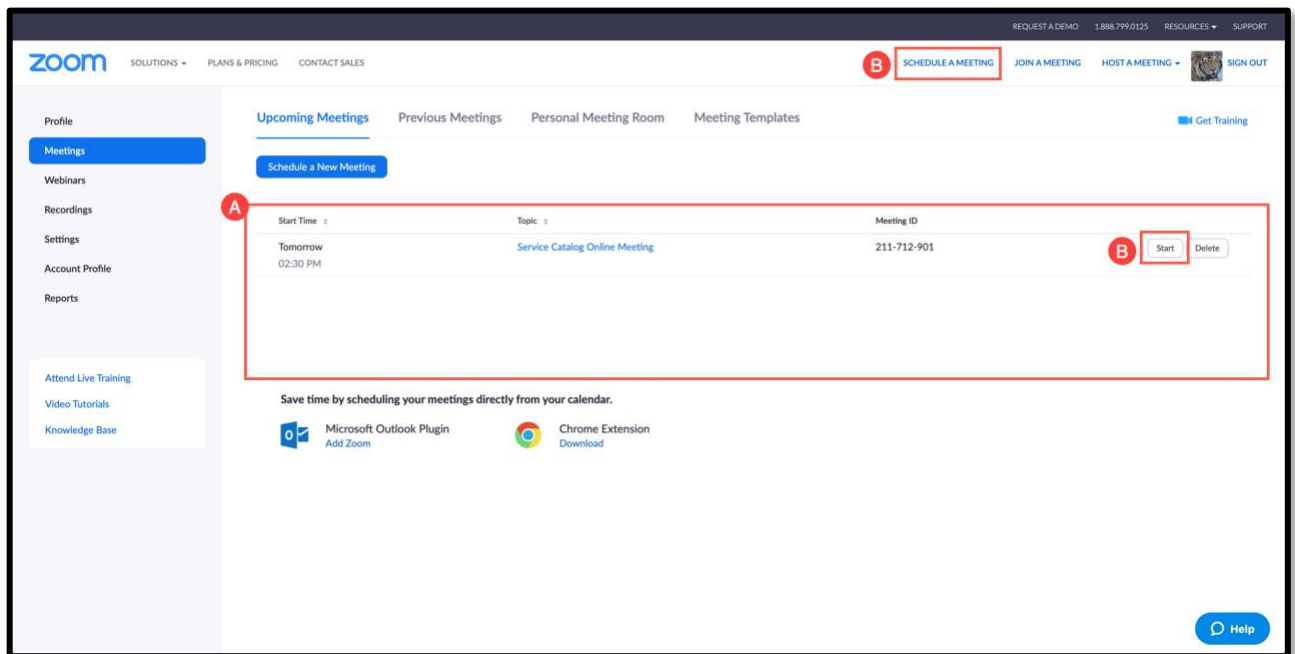
## From Web Browser

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1. Select Meetings in the left-hand menu.



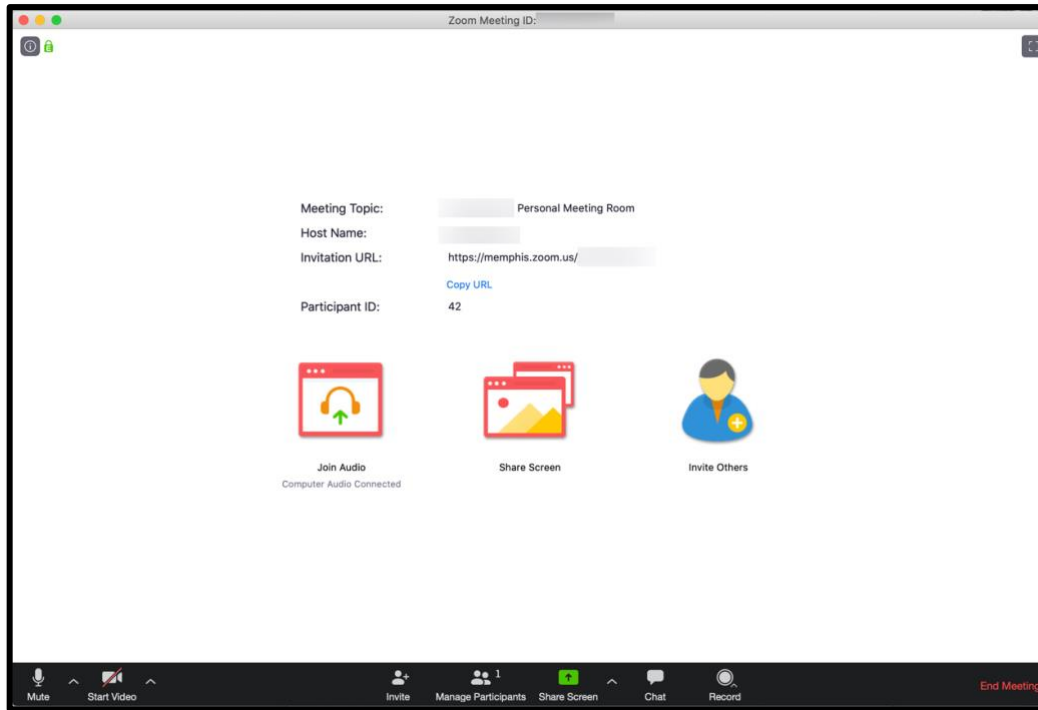
2. A) From the Meeting List, B) click on the Start to begin your meeting.



## The Meeting Room

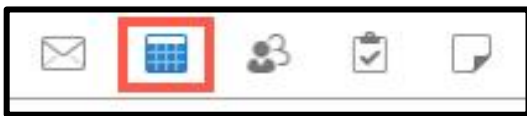
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Once you have entered the meeting room, your desktop screen should appear like so.



### Starting a Meeting in Outlook - *If Outlook Plugin Has Been Installed*

1. Open the **Outlook Desktop App** and switch to calendar view.



2. In the Home tab, select **New Meeting**.



3. Select **Add a Zoom Meeting**.



4. Add meeting details and **Send**.

## Additional Support and Tutorials for Zoom

Below are some helpful resources from our Knowledge Base that provide more information about how to use Zoom:

[Watch the Getting Started Videos](#)

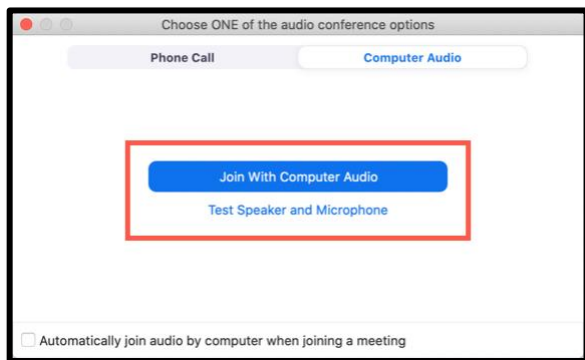
[Join Weekly Zoom Meetings and Webinar training](#)



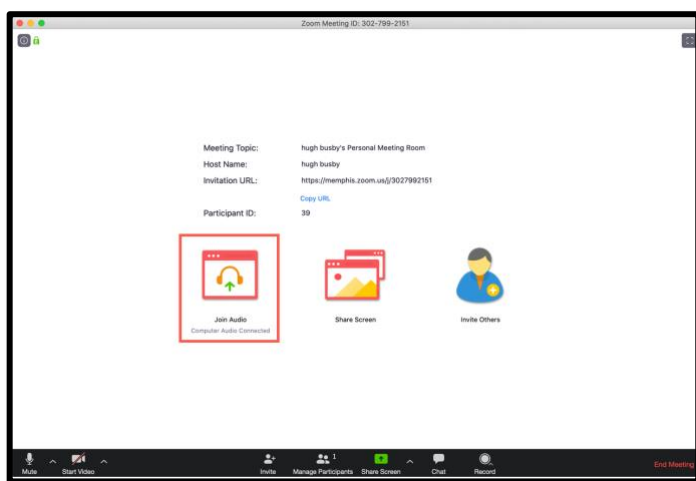
# In-Meeting Controls

## Audio

When starting/joining a meeting, you can join the audio by phone or computer.



- Choose **Join with Computer Audio** to connect your computers mic and speakers to the Zoom Meeting. You can test your Audio sources by using the **Test Speaker and Microphone** link before joining.
- Choose **Phone Call** and dial the number provided. Enter in the **Meeting ID** and make sure to input the **Participant ID**.



*Note: Clicking on the Mic icon will let you mute and unmute your audio once connected*

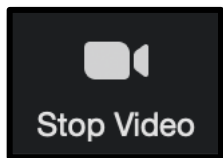
## Video

Access Video settings before or during a meeting by clicking on the **Settings** icon on your Zoom Desktop Application. On the Video tab you can preview and change your camera source via the down arrow.

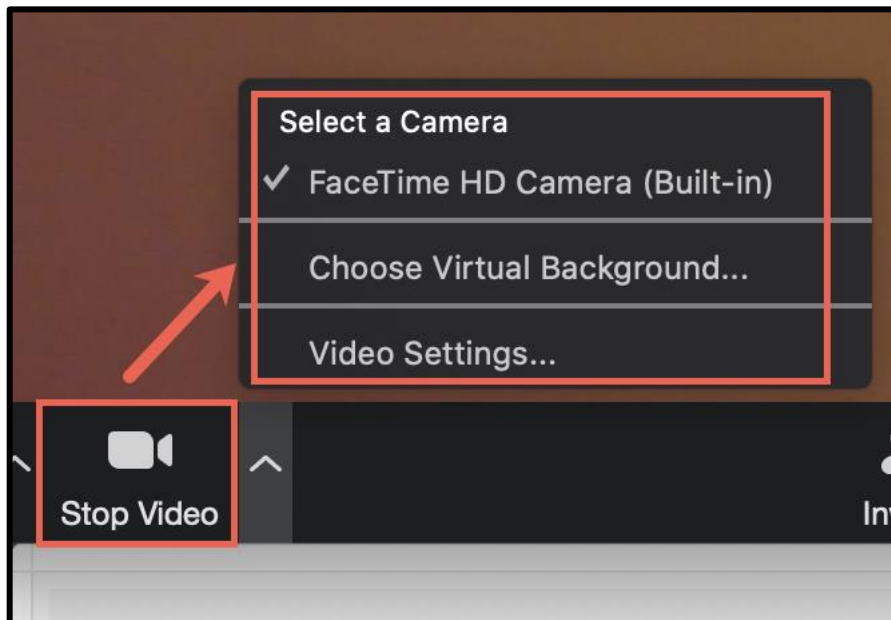
Clicking on the Video icon will let you start



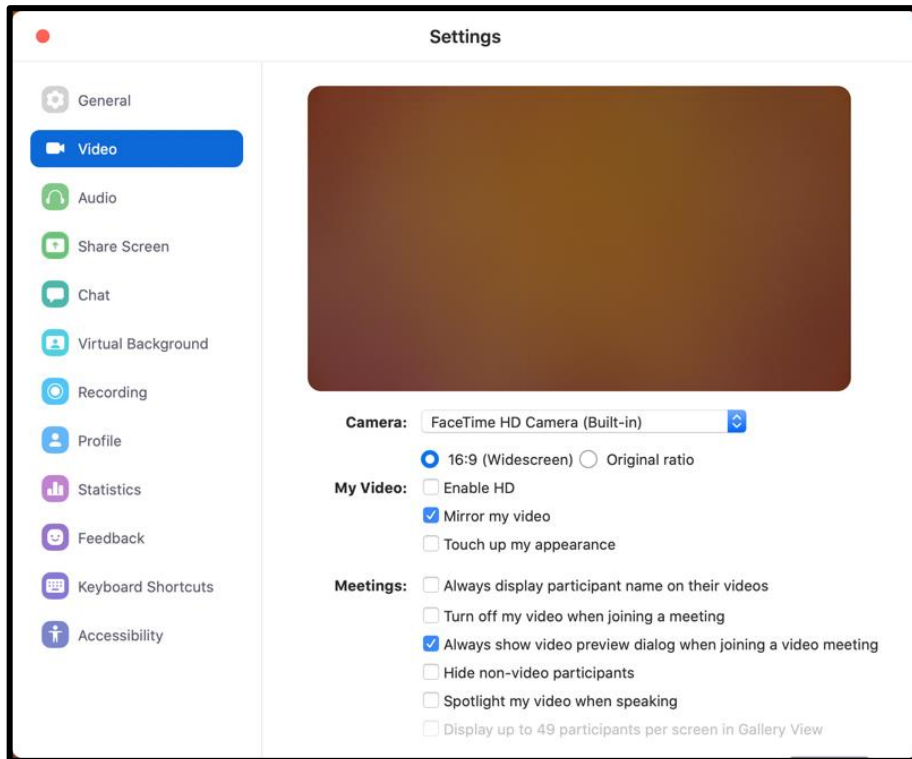
and stop your video feed



Additional Video Settings can be found by clicking on video settings from the drop-down menu.

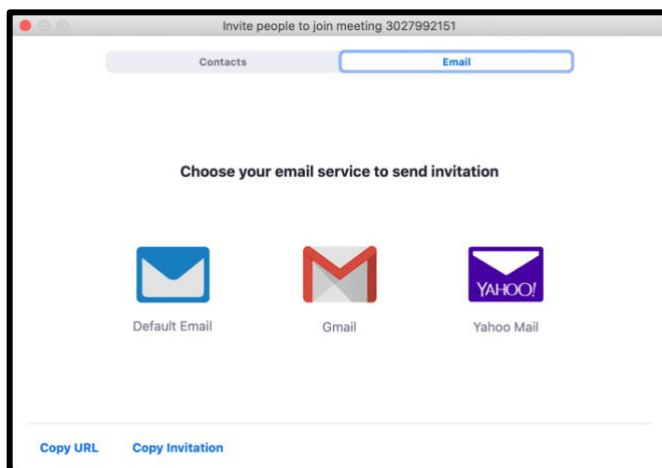


This will provide additional settings for your video.



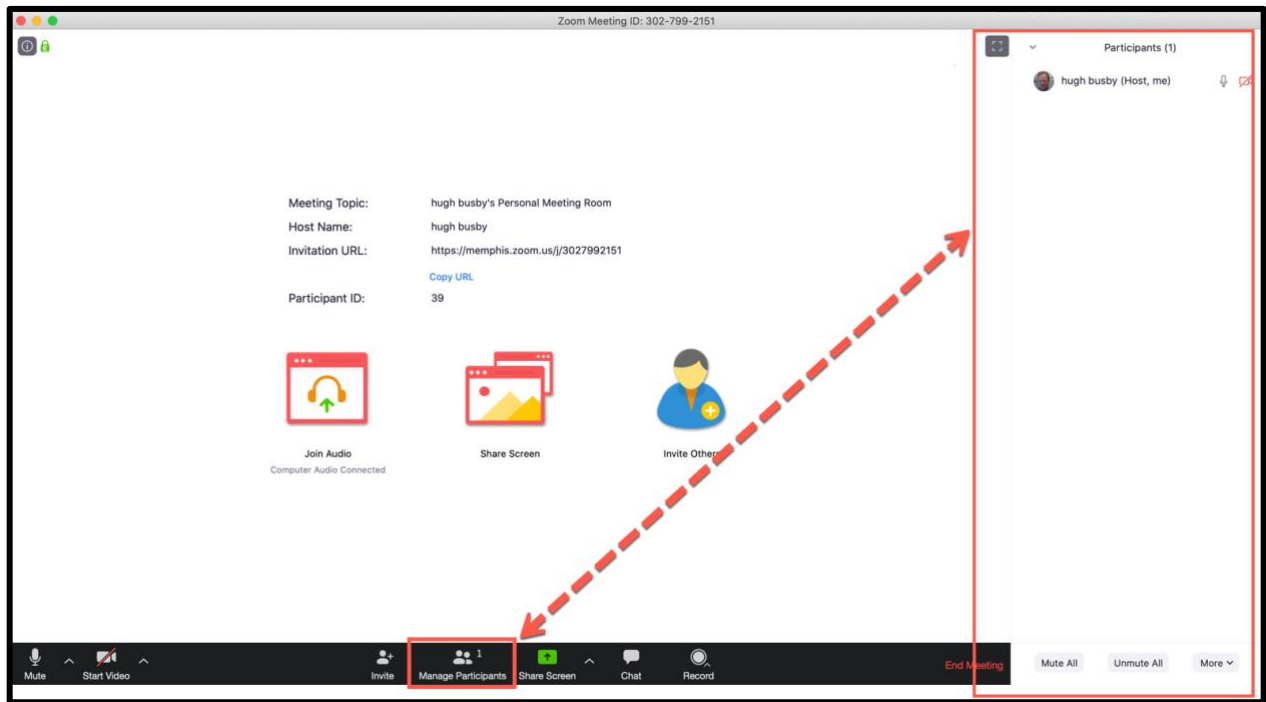
## Invite Participants

You can invite participants during a meeting, click “Invite” to send meeting information to more participants by email, Zoom chat, phone, or room system. Choose to invite someone from your contacts or by sending them an email.

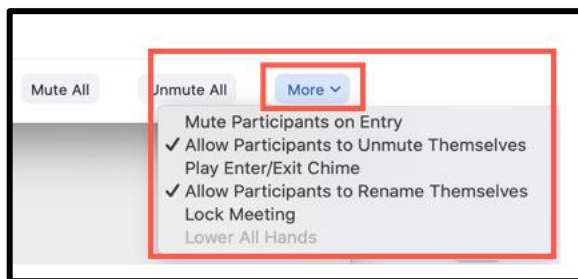


## Manage Participants

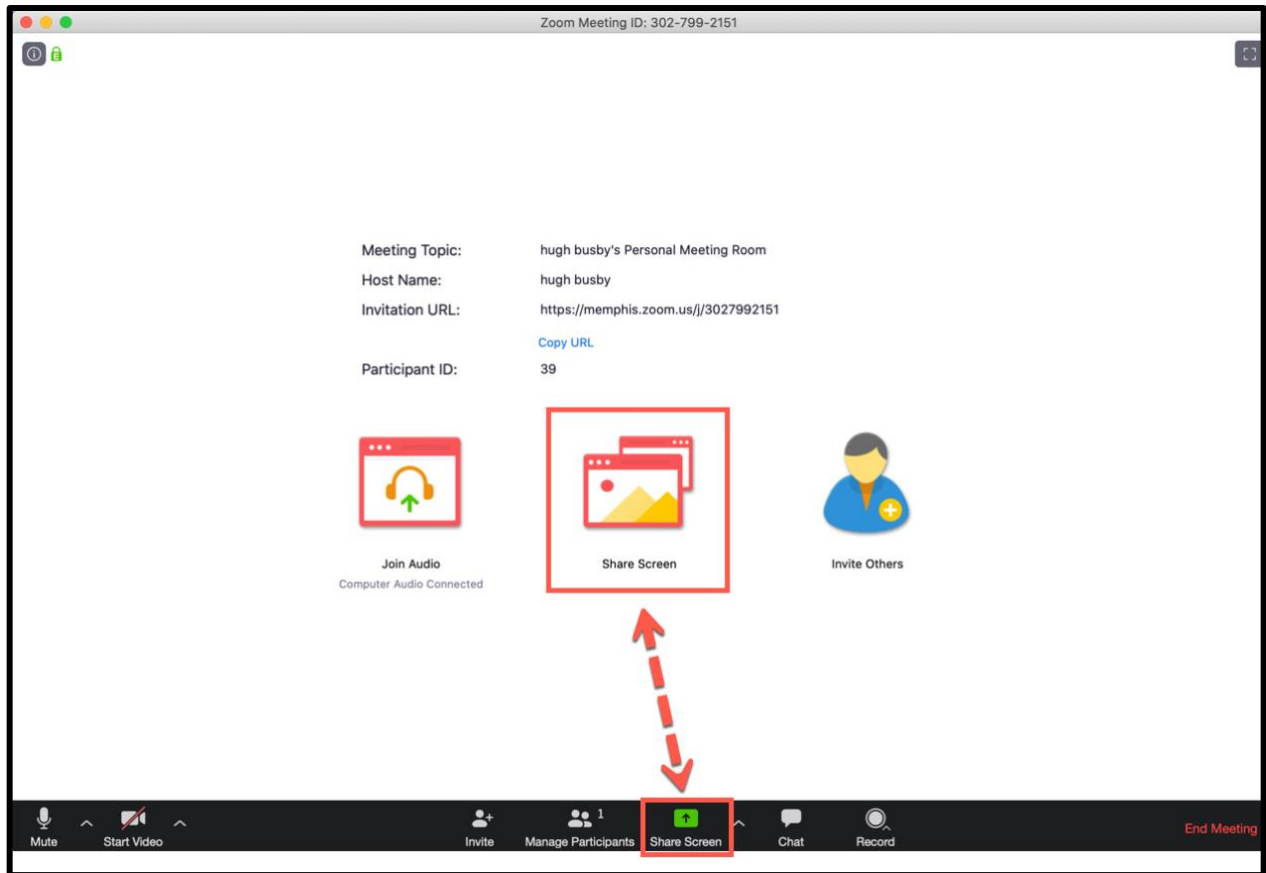
When hosting a Zoom meeting, you have additional controls available to help manage your participants. Attendees can only view the other participants.



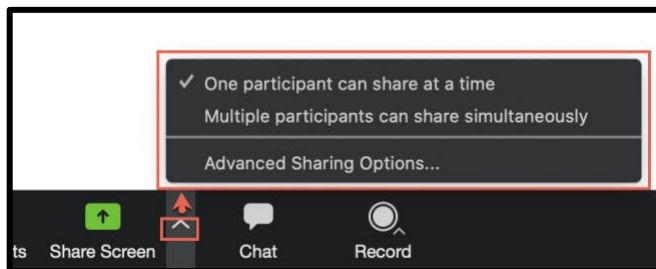
Click **More** to view more options.



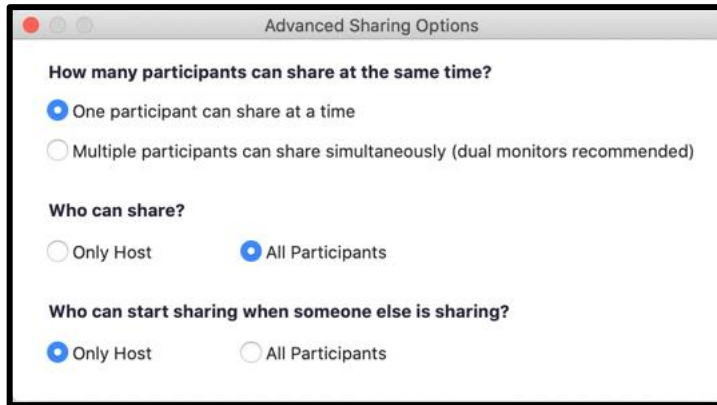
## Share Screen



1. Click Share Screen.
2. Choose to share your desktop, specific application, whiteboard, camera feed.
3. All participants in your meeting can share their screen if you choose or one person can share at a time.



## Advanced Sharing Options



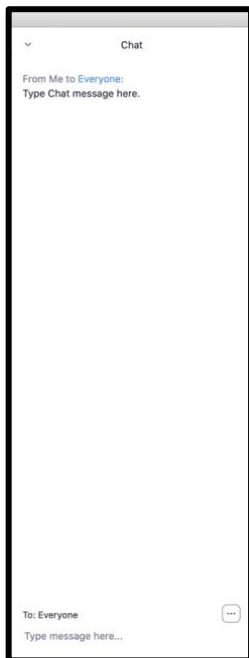
4. During screen sharing you and your attendees can use the Annotation tools for drawing, pointing, highlighting, etc.

## Chat

1. Click "Chat" to start an in-meeting message with participants in the meeting



2. Type at the bottom of the window and message will appear in message pane to right of home screen.



*Note: The chat window will allow you to message Everyone, or a specific participant.*

## Record

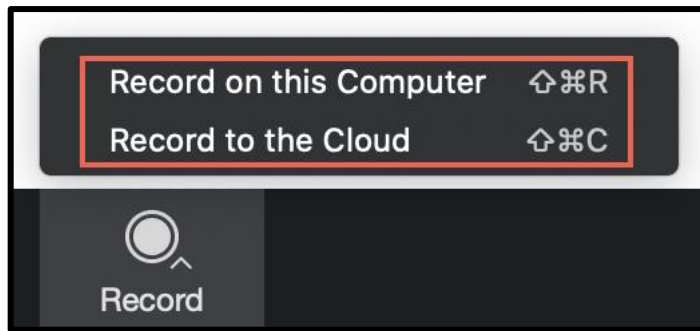
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As a host you can record the meeting to either the Zoom cloud or your local machine.

1. Click on the “Record” icon in the toolbar.



2. Choose to record to the Cloud or Local machine.

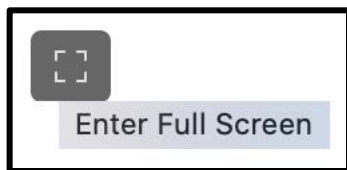


3. Recording will process once the meeting ends.

## Full Screen Mode

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To enter in full-screen mode click on the full screen icon at top right corner of room.



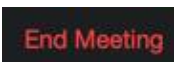
To exit full screen



## Ending the meeting

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To end meeting click End Meeting.



## Zoom - Best Practices to Avoid Zoombombing

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While we have moved to meet virtually on campus with Zoom. We want you to be aware of how to protect your meeting from unwanted guests joining or Zoombombing. These attacks disrupt online Zoom classes by individuals spewing racist, misogynistic or screen sharing vulgar content. Not only can Zoombombing be disruptive on screen, but it can also cause problems in the chat room of the meeting. We've put together some best practices to help you address and avoid Zoombombing.

When sharing a meeting link on social media or other public forums, that makes your event extremely public. ANYONE with the link can join your meeting. We recommend not sharing Zoom meeting links on social media.

Avoid using your Personal Meeting ID (PMI) when hosting public events.

[Enable Waiting Room](#) - The waiting room feature will allow you as the host to control when a participant can join a meeting. This can be turned on under meeting options when scheduling a meeting. View the training video to learn more about meeting controls.

[Enable Only Authenticated Users Can Join](#) - With this feature participants must log in with their UUID and password before joining a meeting. This can be turned on under meeting options when scheduling a meeting.

Here are a few other preventive measures to keep in mind when conducting a virtual meeting in Zoom:

- Allow only signed-in users to join your meeting
- Manage your screen sharing
- Lock the meeting
- Remove unwanted or disruptive participants and prevent them from rejoining
- Disable Video and prevent users from screen sharing
- Mute participants on entry
- Turn off File Transfer feature
- Turn off Annotation
- Disable Private Chat
- Use the Waiting Room

Additionally, Zoom has developed [a blog that helps to define how to prevent Zoombombing](#).



# Locating Help Resources

umTech offers support to faculty, staff, and students. Upon completing the training covered in this course, faculty, staff, and students can receive additional training help and resources. Such help can be located as follows:

## Service Desk Request

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### Submitting a Ticket

- Login URL:
  - [Here is a link to our service desk ticketing system](#)
  - After logging in, choose the link **Request Help or Services**.
  - Choose Request Help or Services.

### Call the ITS Service Desk (901.678.8888) any day of the week! (Excluding Some Holidays)

- The ITS Service Desk hours will be as follows:
  - Monday - Friday 8:00 am - 8:00 pm
  - Saturday 10:00 am - 2:00 pm
  - Sunday 1:00 pm - 5:00 pm
- You can contact the Service Desk for assistance with technical login problems or issues. Incoming calls after hours will be handled by voicemail services. If you require assistance after 8:00 p.m., please leave a message or submit a service request.
- Messages will be checked regularly and receive priority response the following business day. You may also email umTech, [umtech@memphis.edu](mailto:umtech@memphis.edu) (using this email will automatically generate a help desk ticket).

## Important Links

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- [Explore the umTech Website](#)
- [Search Our Solutions Page](#)