Using Zoom for precepting

**Big Picture**
We recommend creating a Zoom chat setup where everyone can "hang out" in a main room for the duration of a clinic session. In addition, you will need create separate rooms that each resident can enter for precepting using the Breakout Room function. As each resident needs to present, they and preceptor can go into the assigned breakout room for a private face-to-face conversation. Then they can return to the main room where everyone is hanging out.  These features will also be very helpful as we incorporate students into virtual clinic.

Most groups have all stay on the zoom call for the entirety of a session – with most parties muted while making calls/charting/etc.  Residents can alert preceptors re: readiness to precept through unmuting or use of the chat box.

**Please note – breakout rooms are only available through BU Zoom (not BMC).**  All preceptors should have access using your Kerberos credentials – follow this link to get started: https://bostonu.zoom.us/

Below are instructions to create individual breakout rooms:

1. Prior to clinic session – a dedicated preceptor host should create the meeting invites in BU zoom and distribute to all members of the clinic group – including any students that might be joining your group.  You can use the same zoom meeting ID for multiple sessions throughout the week.

2. At the time of your clinic session – if you are the host, **first be sure to actually log-in to your BU zoom account at the website above.**  We have noticed that if you simply follow a calendar link to a zoom meeting, sometimes the ability to access break-out rooms is disabled.

3. Then host assigns co-preceptor(s) as "co-host". If there are more than 2 preceptors, the host preceptor assigns all preceptors the co-host role *(it seems that doing this step first before those below is important in getting the breakout feature to function for all the "co-host" preceptors )*

4.  Host then creates individual chat rooms for each resident and each preceptor using the Breakout Rooms button at bottom of Zoom screen (creates # of rooms equal to # of residents + copreceptors.)
    Two steps here:
    a) Rename the room for each resident (this can be done in advance)
    b) Assign each room to the respective resident – resident must be logged into meeting to do this
    c) Again, if you cannot access the breakout room function, try logging out and back into your BU zoom account.

5. In Breakout Room settings, Host must select " allow participants to return to the main session at any time"

6. Make sure host remembers to hit "Open all breakout rooms" button (bottom right) – please warn members of your call that this will send everyone to their assigned breakout room – people can click "return to the main session" at the lower right aspect of the screen to come back.

7. Now Breakout rooms should be ready for all to use with the following caveat:
   - The Host will be able to enter and exit any breakout room from the main conference and switch between rooms from within Breakout rooms
   - Co-host *must first enter* their own assigned room and, *from there,* can switch to any other room. In addition (due Zoom functionality) it seems the co-hosts only have "permission" to enter the *last* breakout room they were in. For example, if you were last in resident A breakout room, you must first enter resident A room and then you can switch into another resident room from there. *This is a key point and may be confusing at first.*

8. Once you are finished precepting with that resident, we recommend all returning to the main conference room to maintain the sense of community/give opportunity for people to ask questions and everyone hear answers, similar to the resident precepting room experience on site at BMC.


Despite the multi-part instructions, we find that the zoom set-up can be completed in less than 5 min at the start of a session once you get through some of the common areas of confusion.  Good luck!!