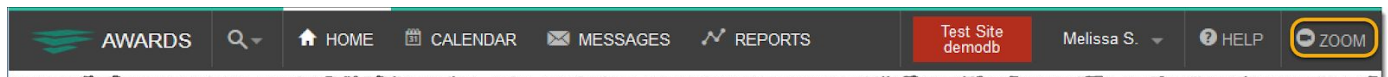



Zoom is a widely used remote communication tool that enables service providers to connect with clients in a HIPAA-secure way, accommodating telehealth needs from one-on-one counseling, to meetings in a group setting. Foothold Technology has integrated Zoom into AWARDS with a single sign-on to allow its users to conveniently and securely start meetings without leaving AWARDS.

This AWARDS/Zoom integration is optional, and must be enabled by your AWARDS administrator. Once turned on, Zoom will be accessible to ALL users from the AWARDS navigation bar, using the **Zoom** icon in the top-right corner.



Required Permissions

If the AWARDS / Zoom integration is turned on in your AWARDS database, **you must have a Zoom account** to take advantage of it. No additional AWARDS-specific permissions are required.

 **Note:** If you are an AWARDS administrator and need to turn the Zoom integration on, it requires access to the Business Rules feature. For details on corresponding required permissions, see [Online Help](#).

About This Document

This document is intended as a quick reference, outlining the processes of using Zoom with AWARDS:

[Turning on the AWARDS Integration for AWARDS](#) - Learn to complete one-time setup to activate the integration.

[Using Zoom From Within AWARDS](#) - Learn to access and work with Zoom from within AWARDS.

[Frequently Asked Questions](#) - Learn the answers to common AWARDS / Zoom integration questions.

Additional Resources

Have questions about Zoom itself? Please visit **Zoom's Help Center** - <https://support.zoom.us/hc/en-us>.

Want to learn more about HIPAA compliance with regard to Zoom? Please see Zoom's [HIPAA Compliance Guide](#).

Turning on the Zoom Integration for AWARDS

★ **Important!** If your Zoom account is managed by an administrator, that administrator must pre-approve the AWARDS app in the Zoom app marketplace before the integration can be made available in your AWARDS database using the following procedure. For more information on the approval process, please see Zoom's documentation, [here](#).

To complete one-time setup to turn on the AWARDS / Zoom integration so that it is available for all users in your AWARDS database, complete the following steps from within AWARDS:

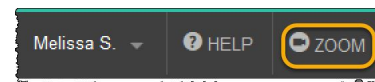
1. From the AWARDS *Home* screen, click **Administration** in the left-hand menu, and then click **System Setup**.
2. From the system setup fly-out menu, click **Business Rules**. The *Business Rules Menu* page is displayed.
3. In the “Global Settings for All Programs” portion of the page, click **Zoom Settings**.
4. Click the **Show Zoom** drop-down arrow and select “On.”
5. Click **UPDATE** to apply your change.

The Zoom setting is saved and the Zoom functionality is now accessible for any AWARDS users from the navigation bar.

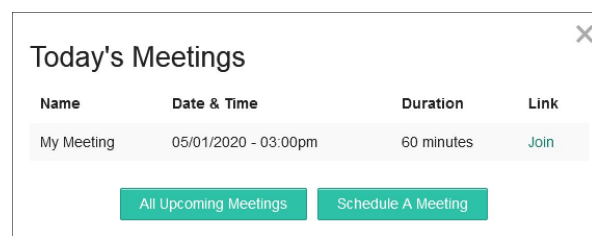
Using Zoom from Within AWARDS

To access and use Zoom from within AWARDS, complete the following steps from any AWARDS page:

1. Click **Zoom** or the Zoom icon from the AWARDS navigation bar, where it can be found in the top-right corner.
2. If this is the first time you are logging into Zoom from AWARDS, or if your Zoom/AWARDS authentication has expired, the Zoom *Sign In* page is displayed in a new browser window. Enter the **Email Address** and **Password** associated with your **Zoom account**, and then click **Sign In**.



In all other instances you are automatically connected to Zoom and a *Today's Meetings* pop-up is displayed in AWARDS. This pop-up automatically lists any meetings scheduled for you with today's date in Zoom.



3. From the pop-up, complete any of the following tasks as needed:

- **Join one of today's meetings** - To do so, click the **Join** link to the right of the meeting in this pop-up. The meeting is launched in Zoom and opened in a new browser window.

✧ **Tip:** Meetings are available to join until one minute before their scheduled end time; for example, if a meeting is scheduled to end at 5pm it is included in the “today's meetings” list until 4:59pm.

- **View all upcoming scheduled meetings** - To view not just today's meetings but all upcoming meetings scheduled for you in Zoom, click **All Upcoming Meetings**. Your Upcoming Meetings list is opened in Zoom and displayed in a new browser window. When you're done working with your Zoom schedule, close that secondary browser window to return to AWARDS.
- **Schedule a meeting** - To do so, click **Schedule A Meeting**. The Zoom meeting schedule interface is launched and displayed in a new browser window. When you've completed the scheduling process, close that secondary browser window to return to AWARDS.

✧ **Tip:** Newly scheduled meetings are not automatically displayed in the Today's Meetings pop-up in AWARDS, even if they are scheduled to take place today. Close the pop-up and reopen it to view the updated meetings list.

★ **Important!** Need help with functionality within Zoom? Please visit **Zoom's Help Center** - <https://support.zoom.us/hc/en-us>.

4. When you're done working in the *Today's Meetings* pop-up in AWARDS, click the **X** in the upper-right corner to close it.

The process of using Zoom within AWARDS is now complete.

Frequently Asked Questions

How Do I “Unauthorize” or Uninstall the AWARDS / Zoom Integration?

- **AWARDS Users** - If you're an AWARDS user who previously authenticated your Zoom credentials in AWARDS, you can “unauthorize” the AWARDS / Zoom connection from **within Zoom** by doing the following:

1. Navigate to the [Zoom App Marketplace](#).
2. From the left-hand menu, click **Manage**, and then **Installed Apps**.
3. Click **Uninstall** for the Foothold-Integration app.



The app is now uninstalled. If your agency's AWARDS / Zoom integration is still active, the **Zoom** option in the AWARDS navigation bar will still be available at this point; however, its use would require you to re-enter your Zoom credentials (as detailed in step 2 of [Using Zoom from Within AWARDS](#)).

- **AWARDS Administrators** - To turn off the AWARDS / Zoom integration *entirely* so that it is no longer accessible, complete the following steps from **within AWARDS**:
 1. From the AWARDS *Home* screen, click **Administration** in the left-hand menu, and then click **System Setup**.
 2. From the system setup fly-out menu, click **Business Rules**. The *Business Rules Menu* page is displayed.
 3. In the “Global Settings for All Programs” portion of the page, click **Zoom Settings**.
 4. Click the **Show Zoom** drop-down arrow and select “Off.”
 5. Click **UPDATE** to apply your change.

The Zoom setting is saved and the Zoom functionality is now no longer accessible for any AWARDS users from the navigation bar. “Foothold-Integration” will still be listed as an app for individual users within Zoom itself, but the integration will not be functional. The app can be uninstalled on an individual level using the instructions provided above.

How Long Does Foothold Retain My Personal Zoom Account Data?

How long Foothold Technology retains your Personal Data, including for the purposes of third party apps, is dictated by the Health Insurance Portability and Accountability Act as well as the HiTECH Act. Foothold Technology is a

Business Associate as defined by HIPAA and we will retain your Personal Information for the period necessary to fulfill the purposes outlined in the Federal law and our Business Associates Agreement.

You can find more information about our Data Retention policies in your BAA and here:
<https://footholdtechnology.com/human-services-software/hipaa-compliant-ehr/#HIPAA>