# Schedule a Virtual Health Visit with automatic email reminder, on behalf of a provider

IMPORTANT: Please use the <u>web browser</u> version of ZOOM*

1. Set up clerk scheduling privileges

Note: Multiple clerks can be assigned to schedule on a provider's behalf.

1. **Provider** signs into ZOOM - https://zoom.us/
2. Click **Settings.**
3. Click **Other.**
4. Under **Scheduling Privilege,** click **+** sign next to **Assign scheduling privilege to**.
5. Enter one or more email addresses in the window, separated with a comma.
6. Click **Assign.**
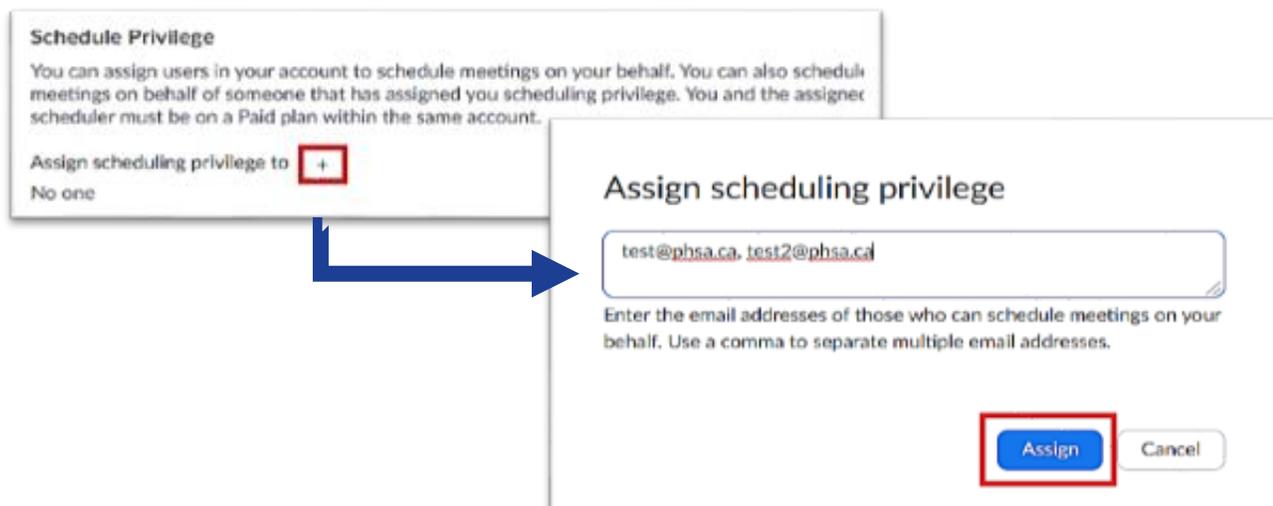
The user with newly assigned privileges will need to sign out of ZOOM and sign in again before they will be able to schedule for someone else.

If scheduling privilege cannot be assigned, you will receive an error message.

## 2. Schedule the Virtual Health Visit on behalf of the provider

1. **Clerk** signs into ZOOM - https://zoom.us/
2. Click on the **Webinars** tab.
3. Click **Schedule a Webinar** or **Webinar Templates** to select from your webinar templates.
4. Complete the webinar details.
5. Under **Schedule For** choose the provider you want to schedule for from the dropdown menu.

- Note: If you do not see them in the list, they will need to provide you access to book on their behalf.
6. Click **Schedule** when all webinar details are completed.

3. Invite the patient to their Virtual Health Visit
1. Now that the visit is scheduled, scroll down to **Invitations** and invite the **patient as a panelist**** by clicking **Edit.**
2. Enter patient's name and email address.
3. Click **Save.** The patient will automatically be sent an email invitation through Zoom.
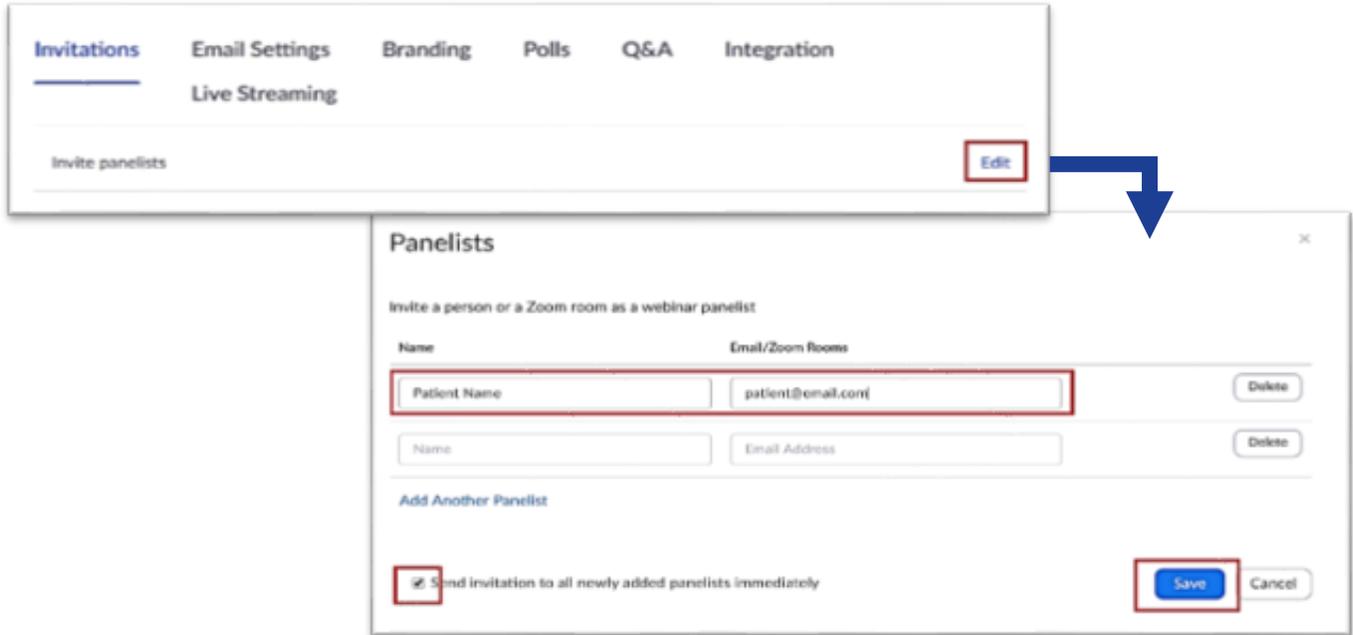
3. Set up an automatic Virtual Health Visit email reminder
1. Click **Email Settings**
2. Click **Edit** next to the **No reminder email to Attendees and Panelists** to adjust the settings.
3. Select the reminder option(s) you prefer.
4. Click **Save.**

4. Add the Virtual Health Visit to your Outlook calendar (optional)
1. Click **Outlook Calendar (.ics)** to download an .ics file.
2. Click the **.ics download** to open it.
3. Outlook will automatically open and populate a calendar event.
4. Save the event.

*Assigning scheduling privileges and scheduling is to be completed in the web browser. Use the desktop client (installed) version or mobile app on LTE data to conduct visits. The desktop client ensures video quality by adjusting to the amount of available internet bandwidth.

**By adding the patient as a panelist, the patient will be able to share their camera feed and speak to their provider. Attendees cannot share their camera feed or speak to their provider without being 'promoted' to the panelist role.