Schedule a Zoom virtual health visit (1:1 or group) in Microsoft Outlook

Purpose

The Microsoft Outlook (referred to as Outlook from here on) plugin for Zoom allows you to schedule and manage virtual health visit meetings from Outlook for your own account or on behalf of a provider.

The Outlook plugin can be used for:
- Scheduling one-to-one and group virtual health visit meetings for yourself or on behalf of a provider
- Assigning an alternative host to virtual health visit meetings
- Managing virtual health visit meetings as Zoom and Outlook delegates
- Inviting participants via Outlook invitation
- Sending email notification for changes or cancellations to virtual health visit meetings

The Outlook plugin can't be used for:
- Scheduling virtual health visits as webinars
- Scheduling virtual health visit meetings requiring registration
- Scheduling virtual health visit meetings from a meeting template

How to request the Outlook plugin

- Submit an [IMITS Self-Service Portal](#) request → Make a request → Software – Install, Transfer, Remove → Complete the order form using these values:
  - ***Request Type****:* Order and Install Software
  - ***Did you find the software that you needed****:* No
  - ***Please detail the software you need****:* Zoom Outlook plugin
  - ***Install on Workstation Host Name:*** Your health authority PC or laptop number
    - It may take 4-6 weeks for your request to be processed.
    - To receive the plugin, the healthy authority (HA) device needs to be connected to the health authority network.

Requirements

- If a staff member is supporting a provider with scheduling, the provider must assign scheduling privileges to the staff member in advance.

- Enable meeting passcodes to be embedded in invitation URLs. This allows participants to click to join their visit.

  - Click on the **Settings** tab.

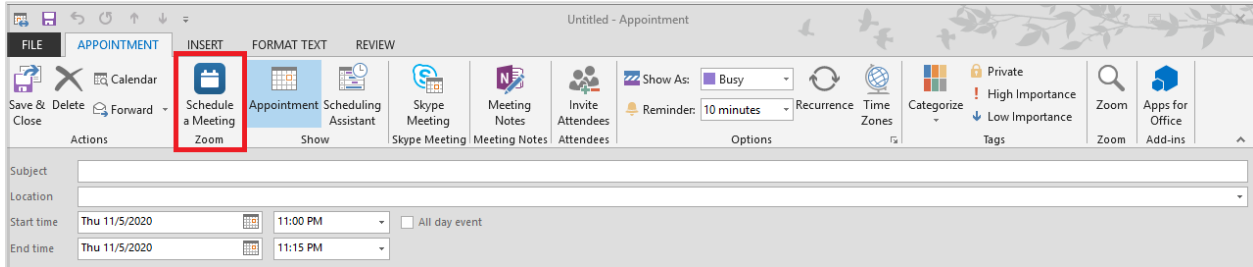 - Scroll to **Embed passcode in invite link for one-click** join and toggle to 'on.'

Embed passcode in invite link for one-click join

Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.

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Schedule the virtual health visit

1. Open **Outlook Calendar** module.
2. Create a new calendar event with the date and time of the virtual health visit.
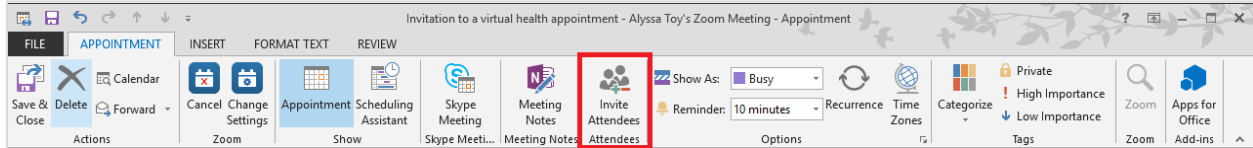3. Click **Schedule a Meeting**.

4. Complete virtual health visit **meeting details**.

| Meeting ID	Leave as **Generate Automatically**
Password	Permanently enabled for security purposes
Video	Change to 'on' for host and participant
Audio	Change to 'Telephone and Computer Audio'
Purpose of the virtual health visit	Select the purpose from the dropdown options
Advanced Options (click to view options)	**Enable Waiting Room** – permanently enabled for security purposes **Enable join before host** – permanently un-ticked as participants must enter the waiting room before entering the virtual health visit **Mute participants upon entry** – leave as un-ticked to reduce participant audio issues **Only authenticated users can join: Sign in to Zoom** – leave as un-ticked to allow participants to join without a Zoom account **Force include Join URL in location field** – leave as ticked **Insert Zoom meeting invitation above existing text** - if ticked, invite is placed above any text you may have manually typed. If un-ticked, manually typed text appears above the invitation. **Schedule for** - Option to schedule the session on behalf of someone else, e.g. a provider. **Alternative hosts** - Assign an 'alternative host' to start the virtual health visit on behalf of the provider. The alternative host must have a Zoom for Virtual Health Visits account.

5. Click **Continue.** The Zoom invitation will populate.
6. Edit the **Subject** for the virtual health visit if required.
7. Add any text below the invitation information if required.

Invite participants to the virtual health visit meeting

1. Click **Invite Attendees**.

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2. Click **To…**.
3. Enter participant(s), provider, and alternative host's email addresses as **Resources.**
   - Participants are added as resources to protect the privacy of email addresses
   - If email addresses are entered as **Required** or **Optional,** they are exposed to all recipients of the invitation.
4. Click **OK.**
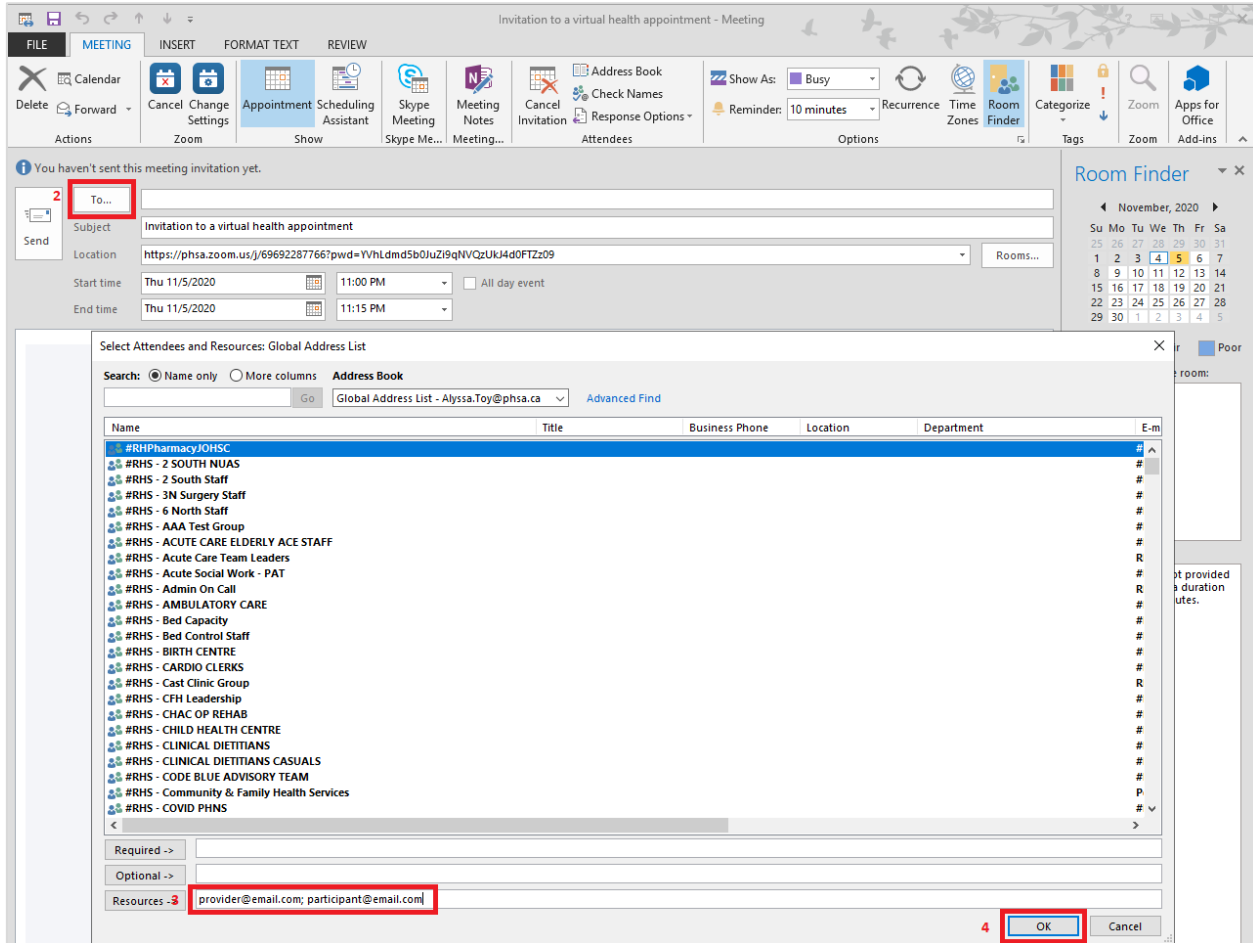
5. Click **No** on the pop up asking if you want to change the location of the event to the email addresses entered.
   - If you click **Yes**, any email addresses entered as resources appear as the location for the meeting.
6. Click **Send** to send the invitation.

The virtual health visit scheduled through Outlook will also appear in the 'Meetings' tab in the Zoom desktop application.

Editing virtual health visits

1. Open **Outlook calendar event** for the virtual health visit.
2. Edit the **date and time** of the invitation as required.
3. If required, click **Change Settings** to change the virtual health visit settings.
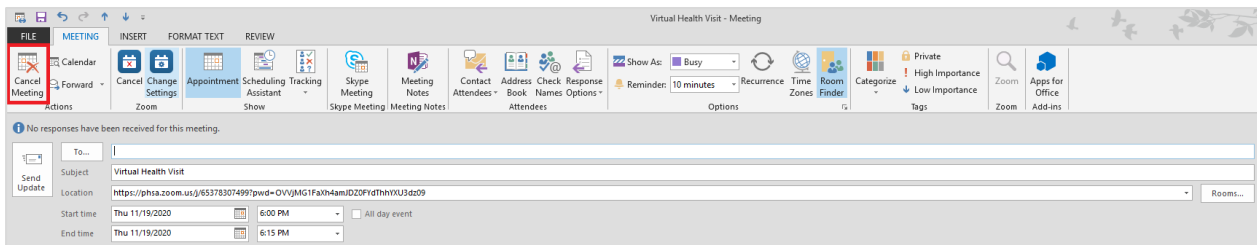4. Click **Send Update** to send an updated invitation.
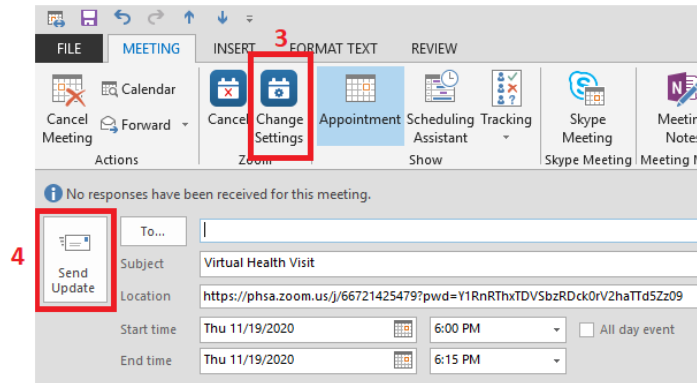
Changes to the virtual health visit will automatically reflect in the 'Meetings' tab in the Zoom desktop application.

NOTE: If you edit the virtual health visit from the Zoom desktop application instead of Outlook, the Outlook calendar event will not update automatically. A new Outlook calendar event with the modified details will generate. We recommend deleting the new calendar event and modifying the original as described above.

Cancelling virtual health visits

1. Open **Outlook Calendar event** for the virtual health visit.
2. Click **Cancel Meeting.**

3. Click **Got it** on the pop up advising the meeting can be recovered in the web browser.
4. Click **Send Cancellation** to send an email notification to all invitees. The calendar event will be deleted.

The cancelled virtual health visit will automatically be removed from the 'Meetings' tab in the Zoom desktop application.

NOTE: If you cancel/delete the virtual health visit from the Zoom desktop application instead of Outlook, the Outlook calendar event will not be automatically deleted. You must go back to the Outlook calendar event to cancel and send the cancellation as described above.