

Schedule a Virtual Health Visit Meeting (1:1 or Group) with registration in Zoom for Healthcare

Purpose

Scheduling a meeting requiring registration provides confirmation to clinics that a patient plans to attend their Virtual Health Visit. Registration also allows patients and clients to receive automated scheduling updates via email from Zoom.

Requirements

- Use the **web browser** version of Zoom for Healthcare to schedule Virtual Health Visit meetings with registration.
 - Note: The desktop client scheduler does not include the option for registration.
- If a clerk is scheduling on behalf of a provider, the provider must assign scheduling privileges in advance.
- Enable meeting passwords to be embedded in invitation URLs. This allows for patients to click to join.
 - Click on Settings tab.
 - Scroll to Embed password in meeting link for one-click join and toggle to 'on.'

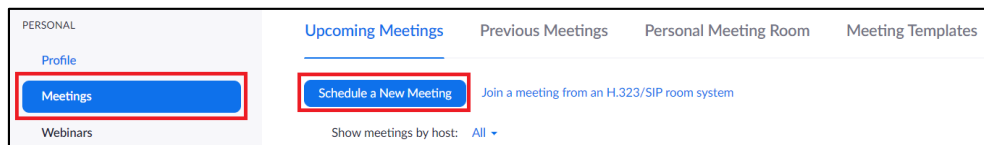
Embed password in meeting link for one-click join

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



Schedule the Virtual Health Visit meeting

1. Sign in to your Zoom for Healthcare account on the web browser - <https://zoom.us/>
1. Click on the **Meetings** tab.
2. Click **Schedule a New Meeting**.



3. Complete meeting details:
 - **Date and time.**
 - **Registration:** Tick box to require.
 - Patients need to register with their name and email to receive the Virtual Health Visit meeting link.
 - Clerk or provider can get notification when patients register.
 - Following registration, patients receive automated updates (e.g. scheduling changes or cancellations) via email from Zoom for Healthcare.
 - **Schedule for:** Pick the name of the person you want to schedule for, otherwise leave as 'Myself.'
 - **Meeting ID:** Leave as 'Generate automatically'. Do not use your Personal Meeting ID.
 - **Meeting Password:** Leave as randomly generated password. The patient does not need to enter the password to join their visit. The invitation URL has the password embedded.
 - **Video:** Change to 'On.'
 - **Audio:** Leave as 'Both.'

▪ **Meeting options:**

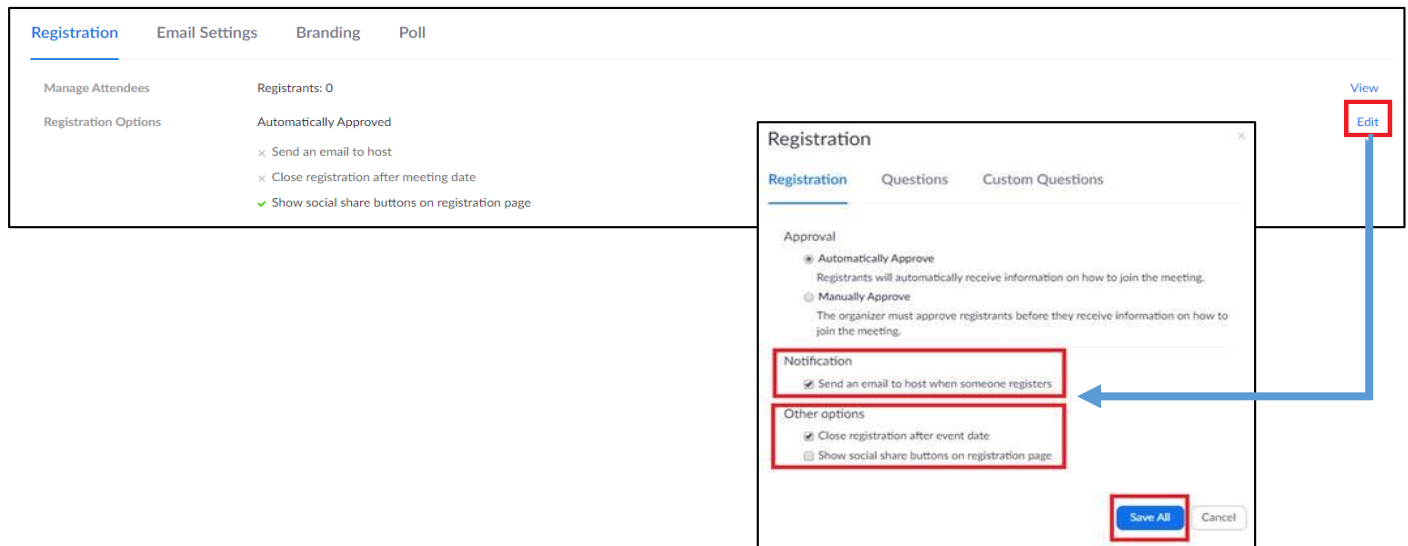
- Enable join before host – leave as un-ticked. Participants still need to be admitted from the waiting room.
- Mute participants on entry – optional.
- Enable waiting room – permanently enabled for security. The meeting host/alternative host will be able to view a waiting room and admit or remove users as required.
- Only authenticated users can join – leave as un-ticked to allow patients to easily join.

- **Alternative Hosts (optional):** Assign an ‘alternative host’ to start the Virtual Health Visit on behalf of the provider. The alternative host must have a PHSA Zoom account.

4. Click **Save** when all meeting details are completed.

Adjust settings for the Virtual Health Visit registration

1. Scroll down to **Registration**.
2. Click **Edit** next to Registration Options.
3. (Optional) Under **Notifications**, tick to **Send an email to host when someone registers**.
4. Under **Other options**:
 - **Tick to Close registration** after event date.
 - **Un-tick to Show social share buttons** on the registration page.



5. Click the **Questions** tab to modify registration questions.

- **For 1:1 visits:** We recommend leaving the questions as is, i.e. the patient is required to provide their first and last name and email address.
- **For group visits:** Consider making ‘Last Name’ not required to maintain patient confidentiality. Names displayed during a Virtual Health Visit can be changed by the host once the patients are admitted into the Virtual Health Visit from the waiting room.

6. Click **Save All**.

Change Email contact information of meeting scheduler (optional)

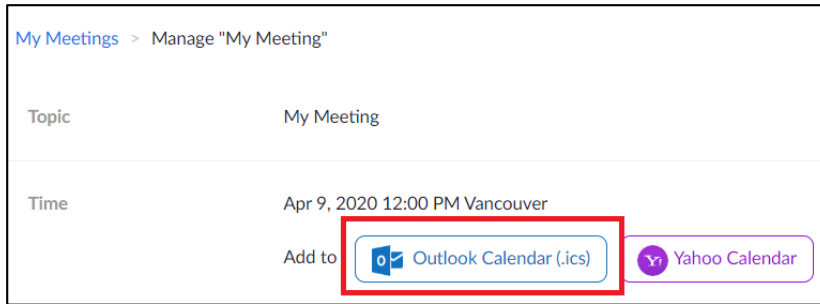
1. Scroll down to **Email Settings**.
2. Click **Edit** next to Email Contact.
3. Change **name** and **email address**.

- The email does not have to be linked to a PHSa Zoom for Healthcare account.
- The name and email address appear as a contact address in the patient’s registration confirmation email and any update emails.
- If you do not change the email contact, the scheduler’s name and email address will appear.

4. Click **Save**.

Add the event to Outlook (optional)

1. Click **Outlook Calendar (.ics)** to download the .ics file.



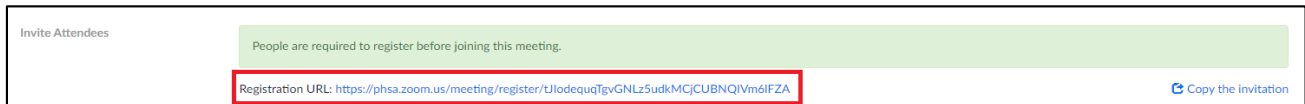
2. Click the **.ics download** to open it. Outlook will automatically open and populate a calendar event.
3. **Save** the calendar event.

If you are the clerk scheduling on behalf of a provider, invite the provider as an attendee:

4. Click **Invite Attendees**.
5. Enter the **provider’s email**.
6. Click **Send** to send the invitation.

Invite patient(s) to register for the Virtual Health Visit meeting

1. Scroll to **Invite Attendees**.
2. Copy the **Registration URL**.



3. Open **Microsoft Outlook**.
4. Create a **new email message**.
5. If conducting a **1:1 Virtual Health Visit**, enter the patient’s email address in the ‘**To**’ field.
If conducting a **group Virtual Health Visit**, enter the patients’ email addresses in the ‘**Bcc**’ field.
6. Paste the **Registration URL** into the email.
Please note, this is not the link to join the Virtual Health Visit. The patient must register for their Virtual Health Visit in order to receive the link to join their visit.
7. **Send** the email.

Check the registration status for the Virtual Health Visit meeting

1. Sign into your Zoom for Healthcare account on the web browser - <https://zoom.us/>
2. Click on the **Meetings** tab.
3. Locate and click the name of the Virtual Health Visit Meeting under **Upcoming Meetings**.
4. Scroll down to **Registration**.

5. The number of attendees registered will appear.
6. Alternatively, click **View** next to Manage Attendees to view a list of registrants.

