

## Webinar templates for Scheduling Virtual Health Visits in Zoom for Healthcare

### Purpose

A webinar template allows you to save certain details of a previously scheduled webinar and apply it to future webinars. You can save up to 40 webinar templates.

### Requirements

- Use the **web browser** version of Zoom for Healthcare to create webinar templates and schedule using webinar templates.
- If a clerk is scheduling on behalf of a provider, the provider must assign scheduling privileges in advance.
- Enable webinar passwords to be embedded in invitation URLs. This allows for patients to click to join.
  - Go to 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

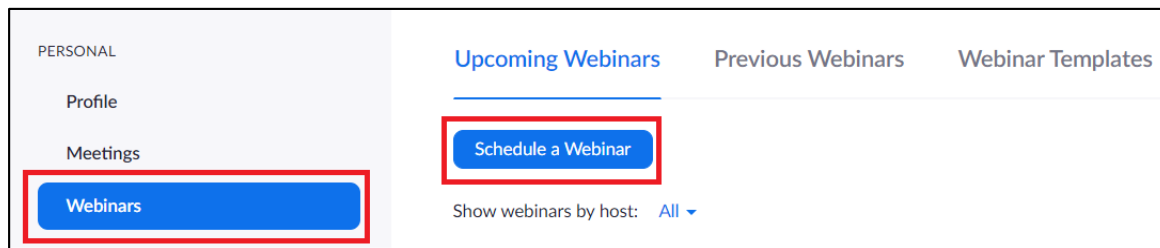
Meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password.



## How to create a webinar template

### Schedule the Virtual Health Visit webinar

1. Sign into your Zoom for Healthcare account on the web browser - <https://zoom.us/>
2. Click on the **Webinars** tab.
3. Click **Schedule a Webinar**.



4. Complete the webinar details.
  - a. **Date and time**
  - b. **Registration**: Leave as un-ticked.
  - c. **Webinar 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.
  - d. **Schedule for**: Pick the name of the person you want to schedule for, otherwise leave as 'Myself.'
  - e. **Video**: Change to 'On.'
  - f. **Audio**: Leave as 'Both.'
  - g. **Webinar Options**: Leave as is.
  - h. **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 for Healthcare account.
5. Click **Schedule** when all webinar details are completed.
6. Apply **Branding**, **Poll** question and answers, and **Q&A** settings if required. These will be applied to the template.



## Set up an automatic Virtual Health Visit email reminder

1. Click **Email Settings**.
2. Click **Edit** next to No reminder email to Attendees and Panelists to adjust the settings.
3. Select the reminder option(s) you prefer.
4. Click **Save**.

Note: Your preferences will be saved to the template.

### Reminder Email

Send Reminder Email to Approved Registrants and Panelists

- ☐ 1 hour before the webinar start date and time
- ☐ 1 day before the webinar start date and time
- ☐ 1 week before the webinar start date and time

## Change the email contact for the Virtual Health Visit (optional)

1. Click **Email Settings**.
2. Click **Edit** next to Email Contact.
3. Add the **name** and **email address** of the contact email you wish to use. The contact email will reflect in all emails from Zoom to the patient (e.g. the webinar invitation).
4. Click **Save**.

Note: Your preferences will be saved to the template.

### Edit Contact Email Address

You may change the contact information that attendees can use if they have questions about the webinar.

Name

No Reply

Email Address

noreply@healthauthority.com

Save

Cancel

## Save the Virtual Health Visit as a webinar template

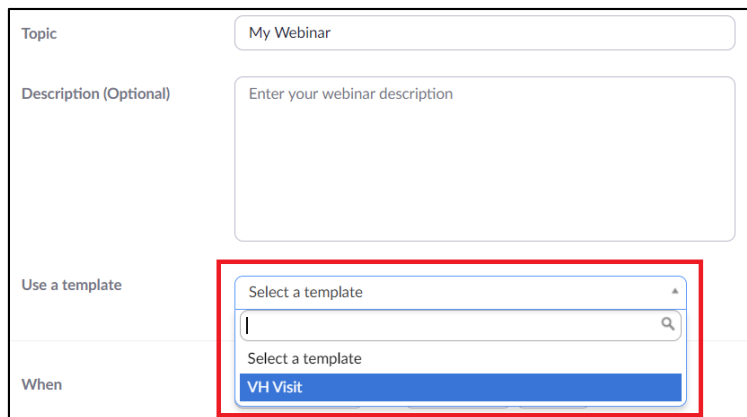
1. Click **Save this Webinar as a template**.
2. Confirm the webinar template name.
3. Click **Save as Template**.
4. Finish the remaining scheduling activities, i.e. invite the patient as a panelist, add the event to Outlook if required.

Topic	Webinar Template Test	
Description	VH visit	
Time	Apr 28, 2020 01:00 PM Vancouver	
Add to	<a href="#">Outlook Calendar (.ics)</a> <a href="#">Yahoo Calendar</a>	
Webinar ID	978-4022-2050	
Webinar Password	***** <a href="#">Show</a>	
Video	Host	On
	Panelists	On
Audio	Telephone and Computer Audio	
	Dial from Canada	
Webinar Options	<input checked="" type="checkbox"/> Q&A <input type="checkbox"/> Enable Practice Session <input type="checkbox"/> Only authenticated users can join	
<a href="#">Save this Webinar as a Template</a>		
Invitations	<b>Email Settings</b>	Branding Polls Q&A Integration

## How to schedule a Virtual Health Visit webinar using a template

Pick the Virtual Health Visit webinar template to schedule from

1. Sign into your Zoom for Healthcare account on the web browser - <https://zoom.us/>
2. Click on the **Webinars** tab.
3. Click **Schedule a Webinar**.
4. Choose a template to schedule from.



5. Some webinar details will populate from the template:

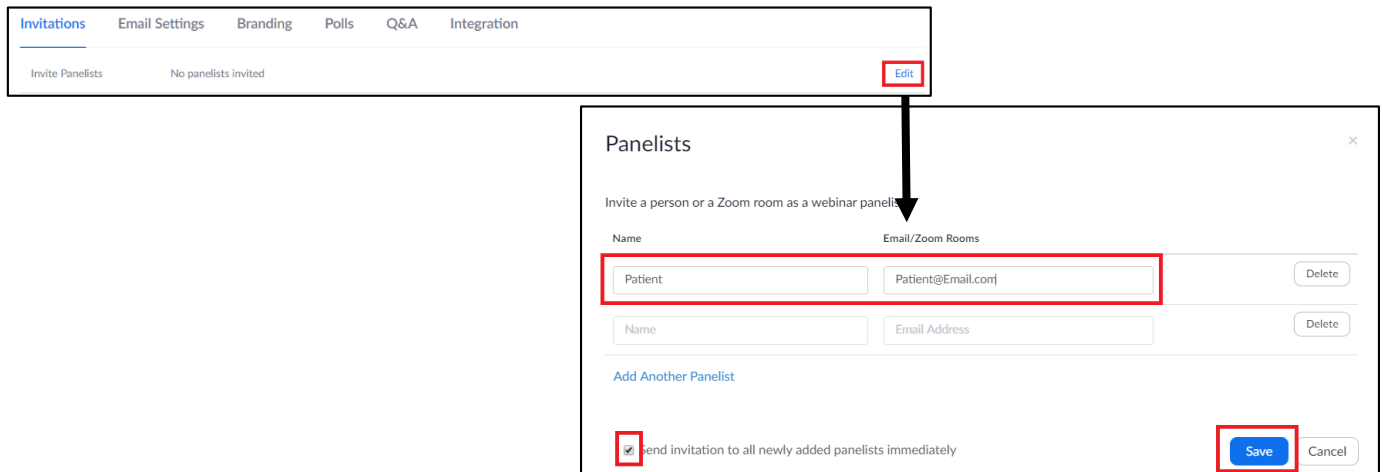
Webinar details <b>applied</b> from template: (Can be edited as required)	Meeting details <b>not applied</b> from template: (Must be manually entered for every meeting)
<ul style="list-style-type: none"> <li>▪ Topic</li> <li>▪ Description</li> <li>▪ Recurrence</li> <li>▪ Registration</li> <li>▪ Video</li> <li>▪ Audio</li> <li>▪ Webinar options</li> </ul> <p>These can be edited if required.</p>	<ul style="list-style-type: none"> <li>▪ Date and time</li> <li>▪ Scheduled for</li> <li>▪ Alternative hosts</li> </ul>

6. Click **Schedule** when all webinar details are completed.
7. Adjust **Branding**, **Poll** question and answers, and **Q&A** settings if required.

### Invite patient(s) to the Virtual Health Visit webinar

1. Now that the visit is scheduled, scroll down to **Invitations** and invite the **patients as a panelists** by clicking **Edit**.
2. Enter each patient's name and email address.
  - **Recommendation:** If scheduling a Group Visit, consider entering patient names as [first name] [last initial], e.g. John S, Jane S). The patient name you enter will be visible to all participants.
  - Up to 99 patients can be invited as panelists.

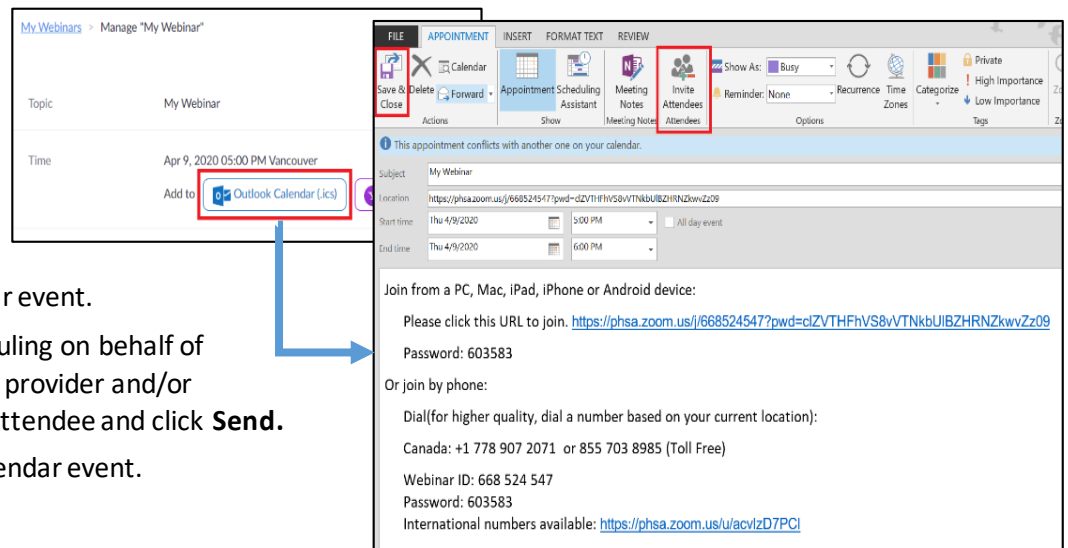
- Click **Save**. The patient will automatically be sent an email invitation through Zoom.



The screenshot shows the 'Invitations' tab in the Zoom for Healthcare interface. Below the tabs, it says 'Invite Panelists' and 'No panelists invited'. An 'Edit' button is highlighted with a red box. An arrow points from this button to the 'Panelists' modal. The modal has a title 'Panelists' and a subtitle 'Invite a person or a Zoom room as a webinar panelist'. It contains two input fields: 'Name' (with 'Patient' entered) and 'Email/Zoom Rooms' (with 'Patient@Email.com' entered). Both fields are highlighted with red boxes. There are 'Delete' buttons next to each field. Below these fields are empty 'Name' and 'Email Address' fields, also with 'Delete' buttons. A link 'Add Another Panelist' is present. At the bottom, there is a checkbox labeled 'Send invitation to all newly added panelists immediately' which is checked and highlighted with a red box. A 'Save' button (highlighted with a red box) and a 'Cancel' button are at the bottom right.

### Add the webinar to your Outlook calendar (optional)

- Click **Outlook Calendar (.ics)** to download the .ics file.
- Click the **.ics download** to open it. Outlook will automatically open and populate a calendar event.
- If you are a clerk scheduling on behalf of the provider, invite the provider and/or alternative host as an attendee and click **Send**.
- Save and Close** the calendar event.

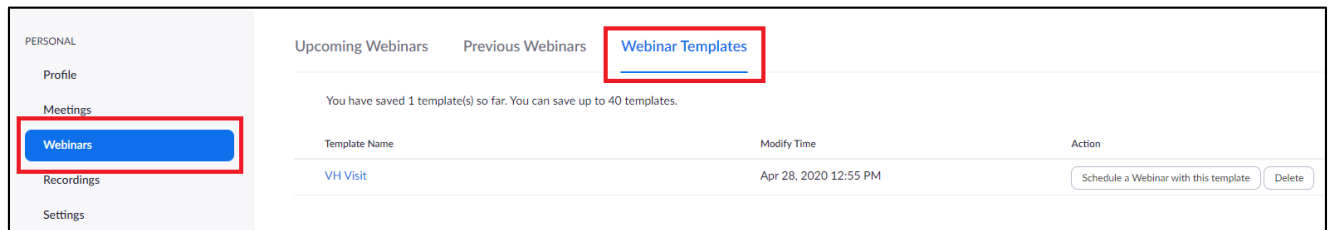


The screenshot shows the Outlook interface. On the left, under 'My Webinars', there is a button 'Add to Outlook Calendar (.ics)' highlighted with a red box. An arrow points from this button to the right pane. The right pane shows the details of the calendar event. At the top, there is a 'FILE' tab and a 'Save & Close' button highlighted with a red box. Below this, there is a warning: 'This appointment conflicts with another one on your calendar.' The event details include: Subject: 'My Webinar', Location: 'https://phsa.zoom.us/j/668524547?pwd=clZVTHFhVS8vVTNkbUIBZHRNZkwyZz09', Start time: 'Thu 4/9/2020 5:00 PM', End time: 'Thu 4/9/2020 6:00 PM'. Below this, there is a section 'Join from a PC, Mac, iPad, iPhone or Android device:' with a URL to join and a password '603583'. There is also a section 'Or join by phone:' with dial-in numbers and the Webinar ID '668 524 547' and password '603583'.

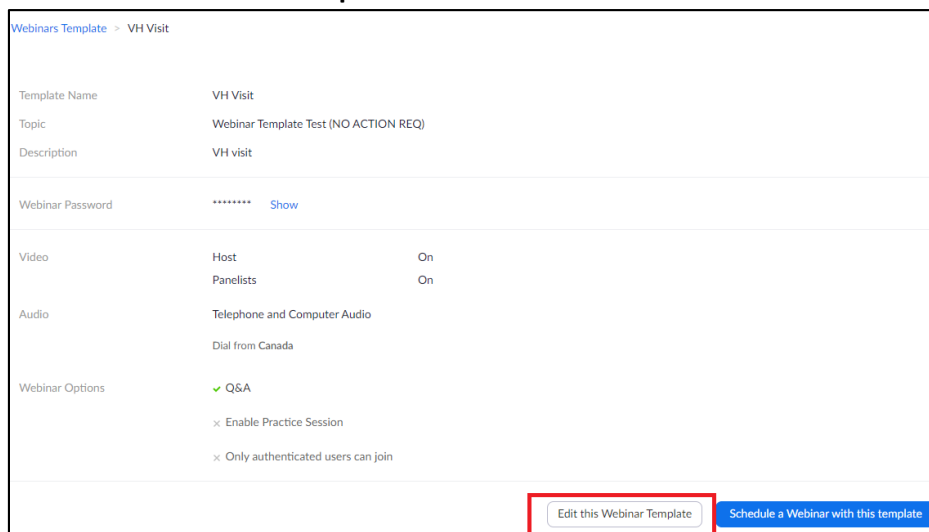
## How to edit or delete a webinar template

### Editing webinar templates

1. Sign into your Zoom for Healthcare account on the web browser - <https://zoom.us/>
2. Click on the **Webinars** tab.
3. Click **Webinar Templates**.
4. Click the name of the template you wish to edit.



5. Click **Edit this Webinar Template**.



6. Edit the required fields.
7. Click **Save**.
8. If applicable, click the **Edit** button within **Email Settings**, **Branding**, **Polls**, and **Q&A** to edit details.

### Deleting webinar templates

1. Sign into your Zoom for Healthcare account on the web browser - <https://zoom.us/>
2. Click on the **Webinars** tab.
3. Click **Webinar Templates**.
4. Click **Delete** next to the name of the template you wish to delete.

