

Physician Scheduling in Zoom

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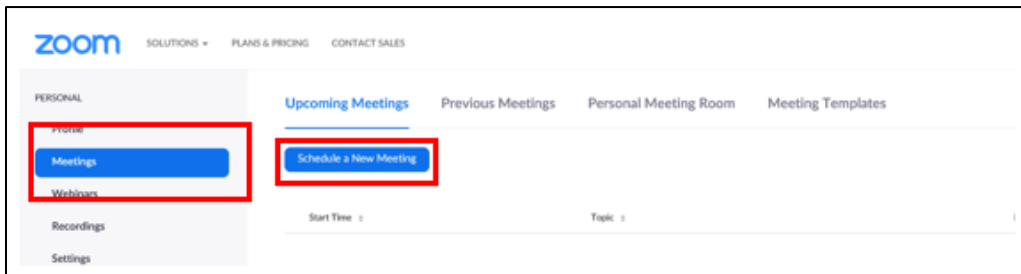
Overview


Use the steps below to set up a Zoom appointment between a patient and a provider.

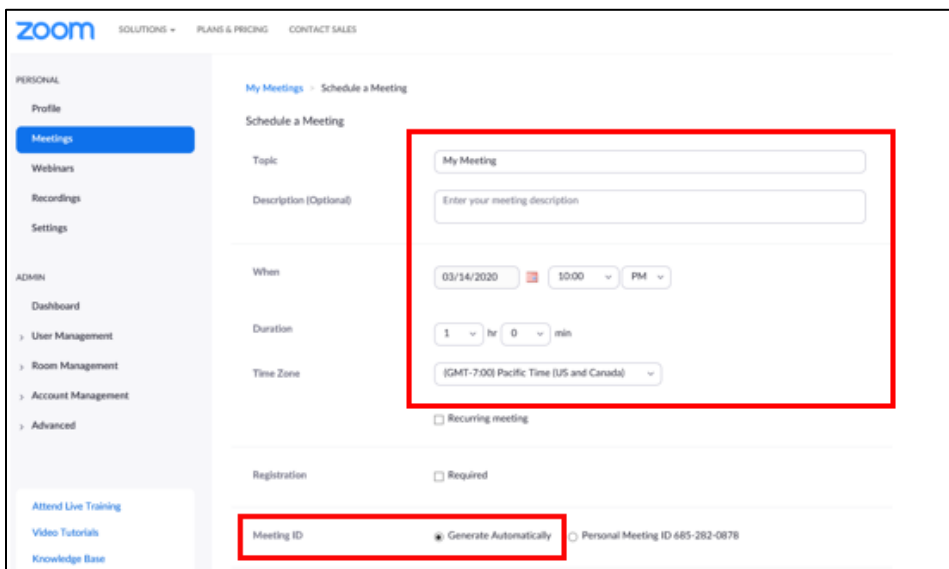
If you have trouble with these steps, we recommend you try troubleshooting via the Zoom Support page – they have great videos and lots of resources. <https://support.zoom.us/hc/en-us>

To Create an Appointment/Meeting on the Computer

1. Sign in, then create an appointment using the **Meetings** button from the left menu.
2. Next, click **Schedule a New Meeting**.



3. Fill out the meeting details including:
 - When (date/time) and Duration
 - Meeting ID (always set to Generate Automatically)
-  Remember not to put PHI in the Zoom meeting. Suggested meeting Topic is [Provider name] – [date] – [time].





In the **Meeting ID** section, it is important to choose **Generate Automatically**- this will ensure each patient receives a different link and can't join an existing appointment.

4. Ensure the following options are set:

- **Required meeting password** check box is **Disabled**
- **Video** radio button for both **Host and Participant** is **Enabled** (set to **On**).
- Select **Enable waiting room**. (This means the provider will need to confirm they are ready for the patient to join the line. The patient will not be able to speak or hear anything until the provider allows them into the meeting.)

5. Click **Save**.

The screenshot shows the Zoom meeting settings interface. The following options are highlighted with red boxes:

- Meeting Password:** The checkbox for "Require meeting password" is unchecked.
- Video:** The radio buttons for "Host" and "Participant" are both set to "on".
- Audio:** The radio button for "Both" is selected.
- Meeting Options:** The checkbox for "Enable waiting room" is checked.
- Buttons:** The "Save" button is highlighted.



Only the Video conference is secure. Do not put any PHI, including patient names or account numbers, into the Zoom platform.

Remember: Meeting ID must be generated automatically. Do Not use the same meeting ID for each meeting as it will allow future patients to join a meeting already in progress.

6. Copy and paste the conference information and send to the patient via secure message. Document the meeting number for the provider

- Communicate the meeting ID to both the provider and patient.
- Both the provider and patient will need the unique meeting ID for each individual appointment.