

Scheduling in Zoom


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To Create an Appointment/Meeting on the Computer	1

Overview

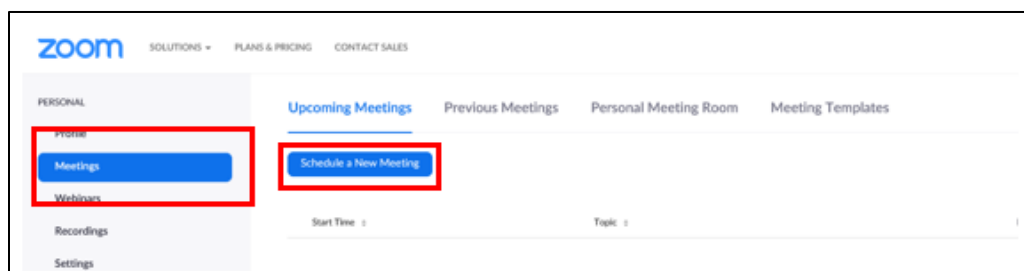
Use the steps below to set up a Zoom appointment between a patient and a provider.

To Create an Appointment/Meeting on the Computer (Typically FO or BO Staff)

1. Work with the provider to confirm what appointments can be converted to virtual visits



Note that the Navigation Center is also scheduling virtual visits. If a new Virtual Visit appointment is scheduled by the Navigation Center, you will still need to follow steps 7-12 to send the patient the Meeting ID. This should be done at least every 4 hours.
2. Call patient and confirm verbal consent to using a video visit
 - a. A video visit means the provider will interact with the patient and consult their medical information via video and audio; a physical exam may take place
 - b. Benefits of telemedicine include gaining access without having to come into the clinic, a potential risk is that depending on your specific medical condition, you may be asked to come in for an in person visit after your telemedicine consult.
 - c. In rare cases, security protocols could fail resulting in a breach of patient privacy
 - d. The alternative to telemedicine is a face-to-face with a physician
3. Verify the patient is able to access myChart
4. Reschedule the patient's existing appointment to a Zoom Virtual Visit [52202]
5. Notify patient they will get a myChart message with instructions on downloading the Zoom app.
 - a. Video and audio must be enabled
 - b. Zoom is accessible by downloading the app on desktop or mobile
6. Sign in to Zoom for correct provider, then create an appointment using the **Meetings** button from the left menu.
7. Next, click **Schedule a New Meeting**.



8. 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].

The screenshot shows the Zoom 'Schedule a Meeting' page. The left sidebar contains navigation links for 'PERSONAL' (Profile, Meetings, Webinars, Recordings, Settings) and 'ADMIN' (Dashboard, User Management, Room Management, Account Management, Advanced). The main content area is titled 'My Meetings > Schedule a Meeting'. It includes fields for 'Topic' (pre-filled with 'My Meeting'), 'Description (Optional)', 'When' (date: 03/14/2020, time: 10:00 PM), 'Duration' (1 hr, 0 min), and 'Time Zone' (GMT-7:00 Pacific Time (US and Canada)). There is a checkbox for 'Recurring meeting'. Below these is a 'Registration' section with a 'Required' checkbox. At the bottom, the 'Meeting ID' section shows two options: 'Generate Automatically' (selected) and 'Personal Meeting ID 685-282-0878'.



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.

9. 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.)

10. Click **Save**.

Meeting Password ☐ Require meeting password

Video

Host ☒ on ☐ off

Participant ☒ on ☐ off

Audio ☐ Telephone ☐ Computer Audio ☒ Both

Dial from United States of America [Edit](#)

Meeting Options

☐ Enable join before host

☐ Mute participants upon entry ⓘ

☒ Enable waiting room

☐ Only authenticated users can join

☐ Record the meeting automatically on the local computer

Alternative Hosts

Example: mary@company.com, peter@school.edu



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

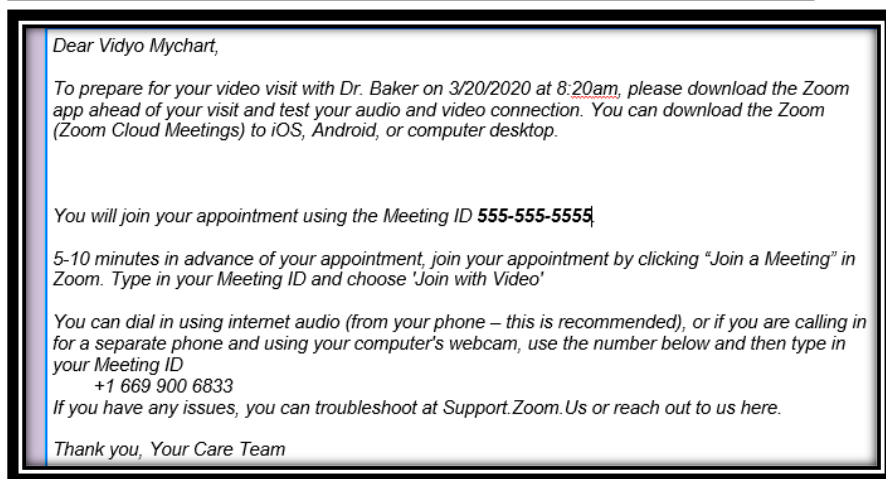
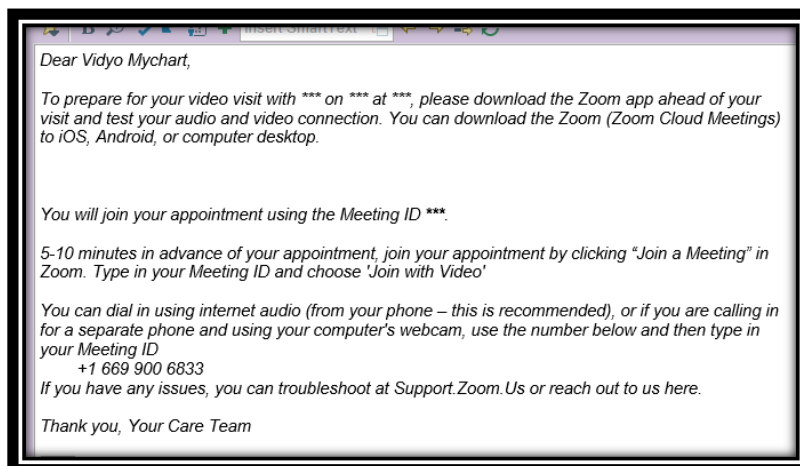
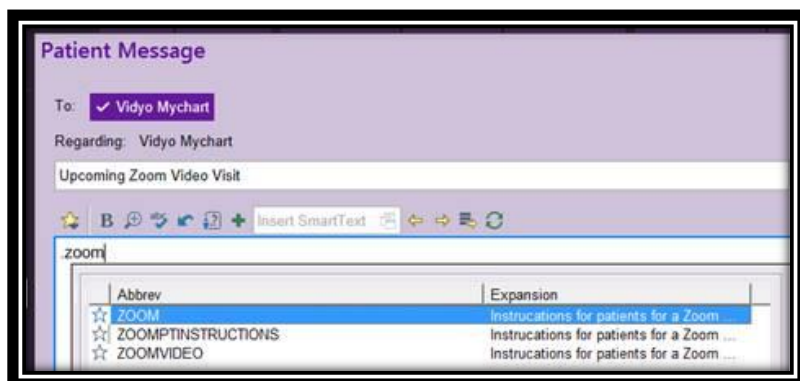
Remember: Meeting ID must be generated automatically. Do Not use the same meeting ID for each meeting as it will allow future patients to join a meeting already in progress.

11. Document in the appointment notes:

- a. Video visit verbal consent
- b. Reason for visit
- c. Zoom Meeting ID

12. Provide patient with appointment prep instructions via myChart.

- a. Open your inbasket and select secure patient message
- b. Select Patient Msg
- c. Search for patient
- d. Enter a free text subject line "Zoom Video Visit Instructions"
- e. In the body of the message type .zoom to bring up the smartphrase
- f. Using F2 to navigate the message content and fill out the wildcards
- g. Select the "Do not allow patient reply" check box
- h. Click send



13. On day of appointment, prior to visit, patient will need to be Arrived for visit
14. Providers to communicate with staff if patient is a no-show so that check-in can be cancelled