QUICK REFERENCE GUIDE

Scheduling and Joining a Zoom Meeting

If you are a Health Care Provider (HCP) who will be offering virtual visits using Zoom for Healthcare or an administrative assistant scheduling on behalf of an HCP, please review the following:

System Requirements for HCPs and Patients.

- An internet connection – high-speed internet or wireless (3G or 4G/LTE).
- Speakers/microphone or headset – built-in, plug-in, or wireless Bluetooth.
- A webcam or HD webcam – built-in or USB plug-in.

## Getting Set-Up for a Zoom for Healthcare Appointment

Note: If an administrative assistant will be scheduling virtual visits on behalf of the HCP, they will need their own Zoom for Healthcare account and must be assigned **scheduling privileges** from the HCP's account.

Sign in using either the **Zoom web portal** or the desktop client. Instructions for downloading the desktop client can be found **here**. If you are having challenges downloading the desktop client and are using a Regional Health Authority (RHA) device, please contact your RHA service desk for support.

Scheduling a Zoom for Healthcare Appointment

Please follow the steps below:

1. Click **Schedule**.
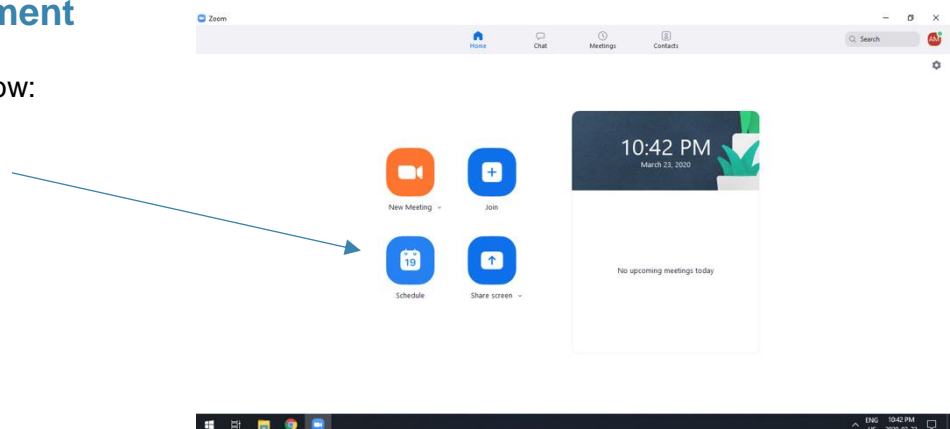
Scheduling a Zoom Meeting

2. Enter **Topic** (i.e. John Doe Zoom Meeting).

3. Enter meeting **Start, Date, and Time.**

4. **Duration: 1 hour** is default.

5. **Meeting ID: Generate Automatically** is default, do not change.

6. **Password: Require meeting password** is set automatically, do not change.

7. **Video:** Host: **On** Participants**: On**. Both are required to be **On**.

8. **Audio: Telephone** and **Computer Audio** is default.

9. **Calendar: Google Calendar** is default. Select appropriate calendar for the invite to appear in.
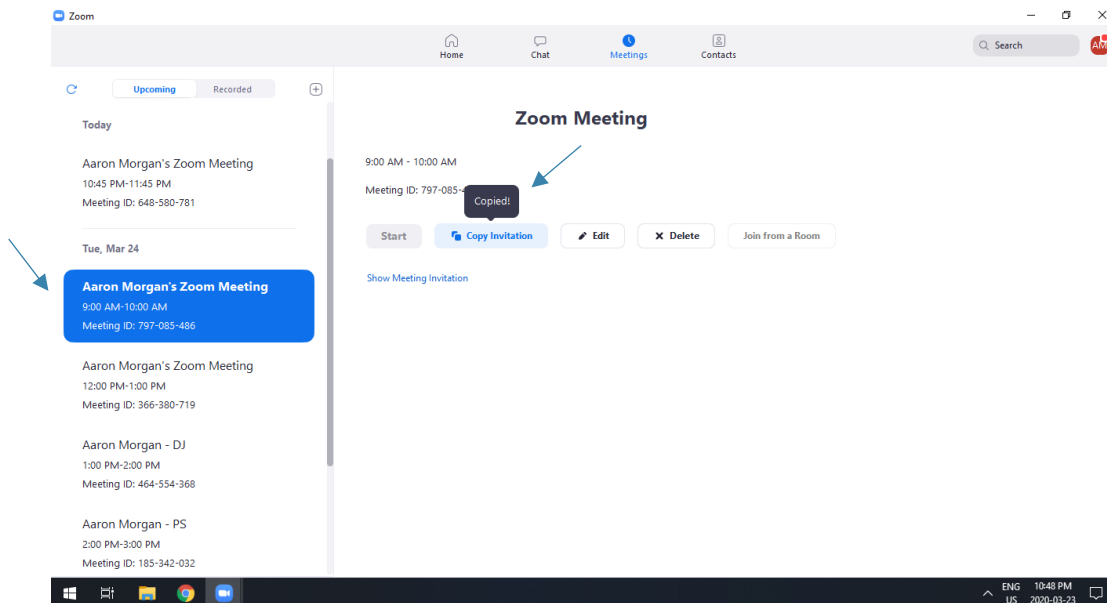
10. Under **Advanced Options,** click **Enable Waiting Room**. Click **Schedule**.
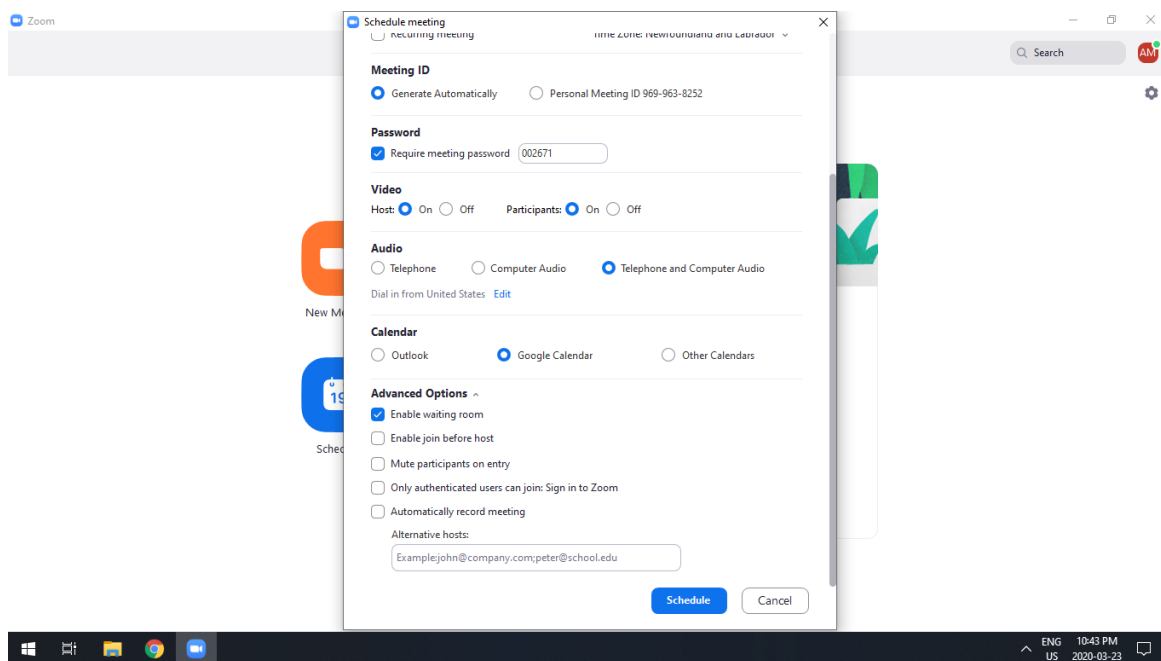
11. Go back to Zoom. Click **Meetings.**
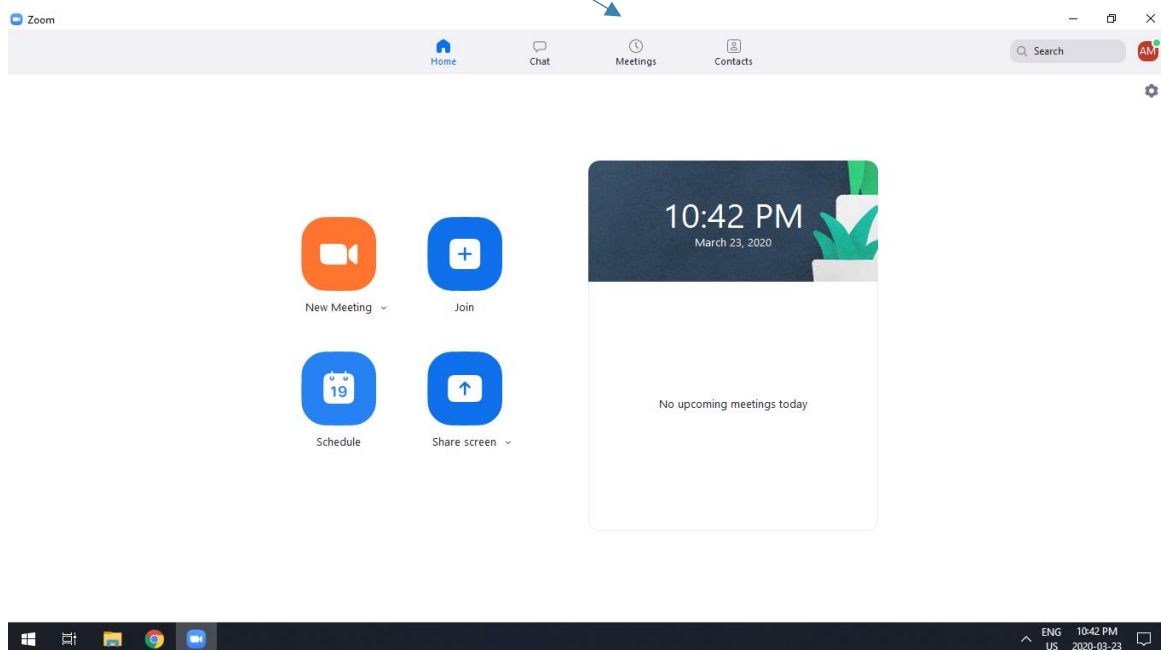
12. Your Zoom meetings will load. Select **Meeting**. Click **Copy Invitation**.

13. To share the meeting details with your client, complete the following steps:

   a. Open your email.
   b. Create a new email.
   c. Enter the client's email address in the **To** field.
   d. Indicate the meeting time in the **Subject** line.
   e. Paste the meeting link into the body of the email. Highlight text (as noted below) and delete all information below **Password**.
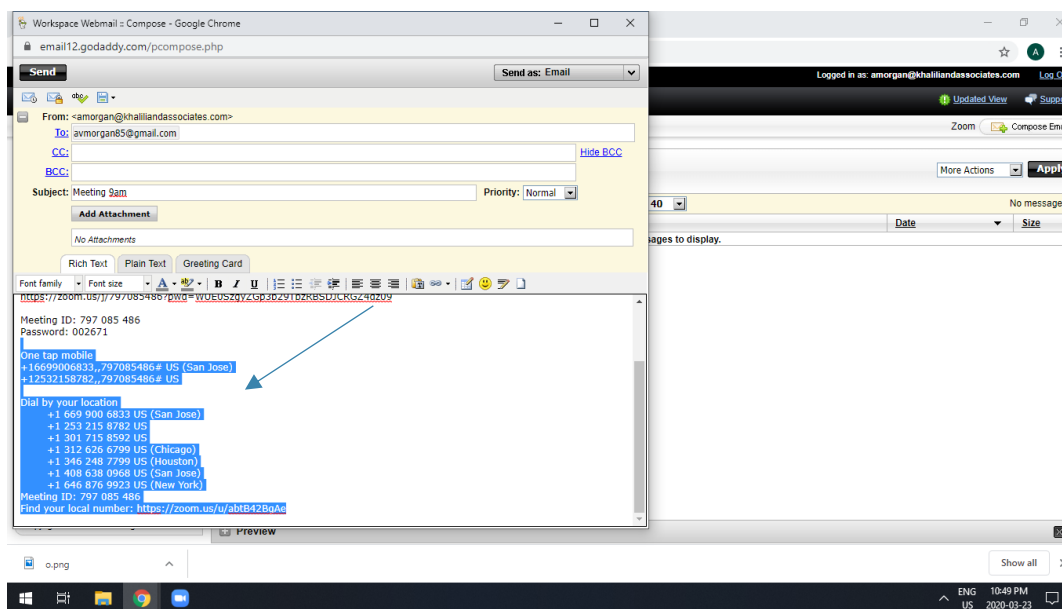
14. This will provide your client will all the information they will require to join the Zoom meeting.
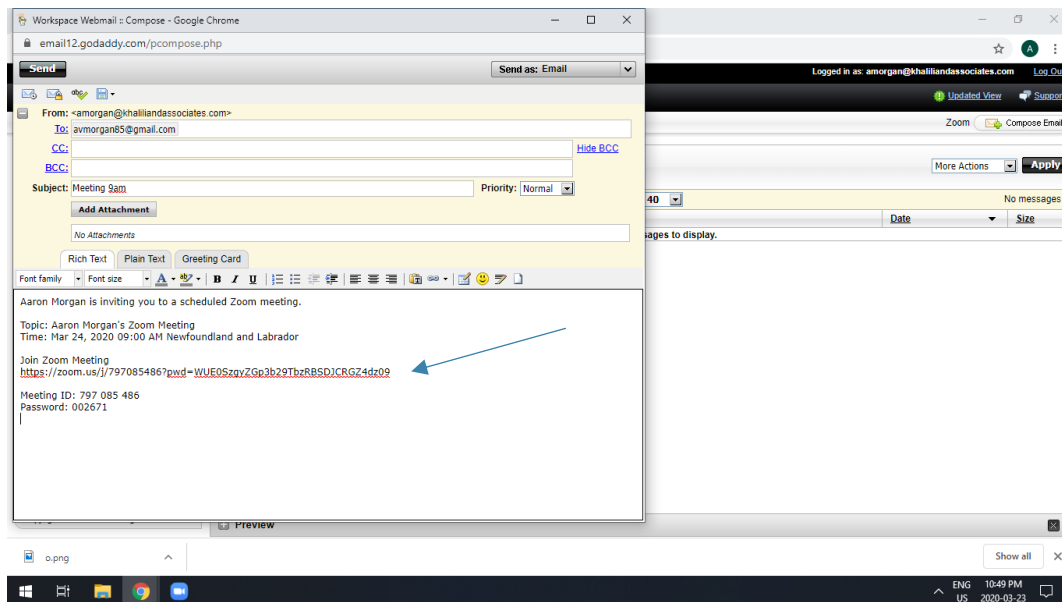
Joining a Zoom Meeting

15. In Zoom, select **Meetings**. Click **Start**.