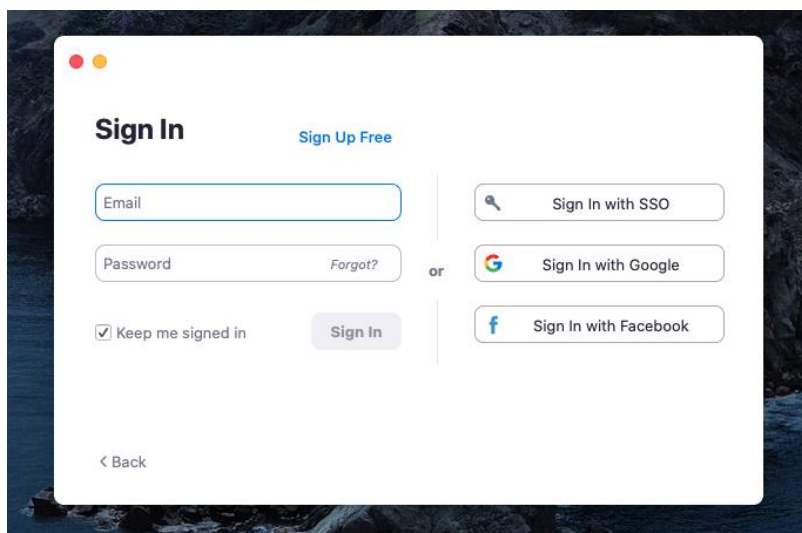
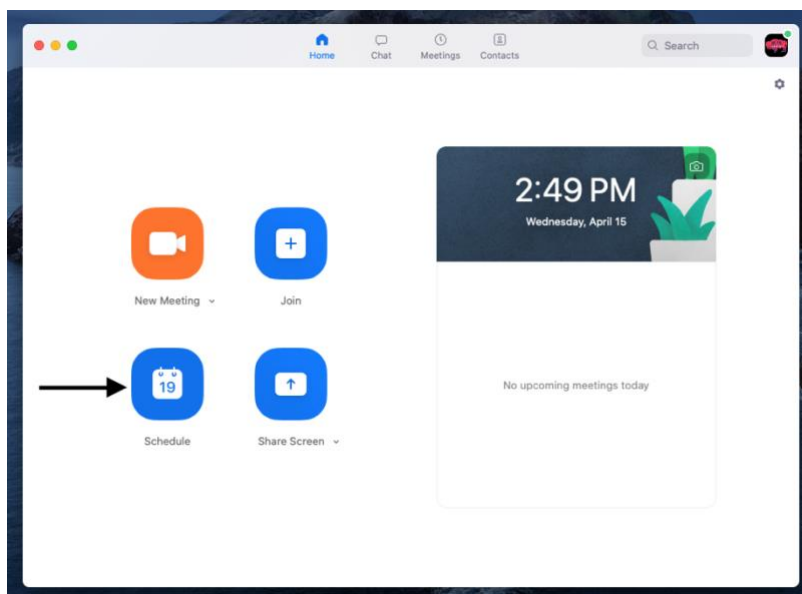


How to Schedule a Zoom Meeting for Telehealth

Step 1: Log into Zoom. Make sure you are using your HIPAA-secure Zoom account.



Step 2: Click on “Schedule”.





Step 3: Enter desired meeting information.

Schedule Meeting

Topic

Wyoming Telehealth's Zoom Meeting

Date

4/15/2020

3:00 PM

to

4/15/2020

3:30 PM

☐ Recurring meeting

Time Zone: Mountain Time (US and Cana...

Meeting ID

☒ Generate Automatically

☐ Personal Meeting ID

Password

☒ Require meeting password

WyTN123



Video

Host ☒ On ☐ Off

Participants ☒ On ☐ Off

Audio

☐ Telephone

☐ Computer Audio

☒ Telephone and Computer Audio

Dial in from United States [Edit](#)

Calendar

☐ iCal

☐ Google Calendar

☐ Outlook

☒ Other Calendars

Advanced Options

Primary Purpose of Meeting (Choose Only One Below):

Education/Training (e.g., webinar, staff training)

Cancel

Schedule

Advanced Options

☒ Enable Waiting Room

☐ Enable join before host

☐ Mute participants on entry

☐ Only authenticated users can join: Sign in to Zoom

☐ Automatically record meeting on the local computer

Alternative Hosts:

wytn@uwyo.edu

Primary Purpose of Meeting (Choose Only One Below):

Clinical/Direct Service (e.g., patient/client mtg)

Administration (e.g., staff meetings)

Clinical/Direct Service (e.g., patient/client mtg)

Education/Training (e.g., webinar, staff training)

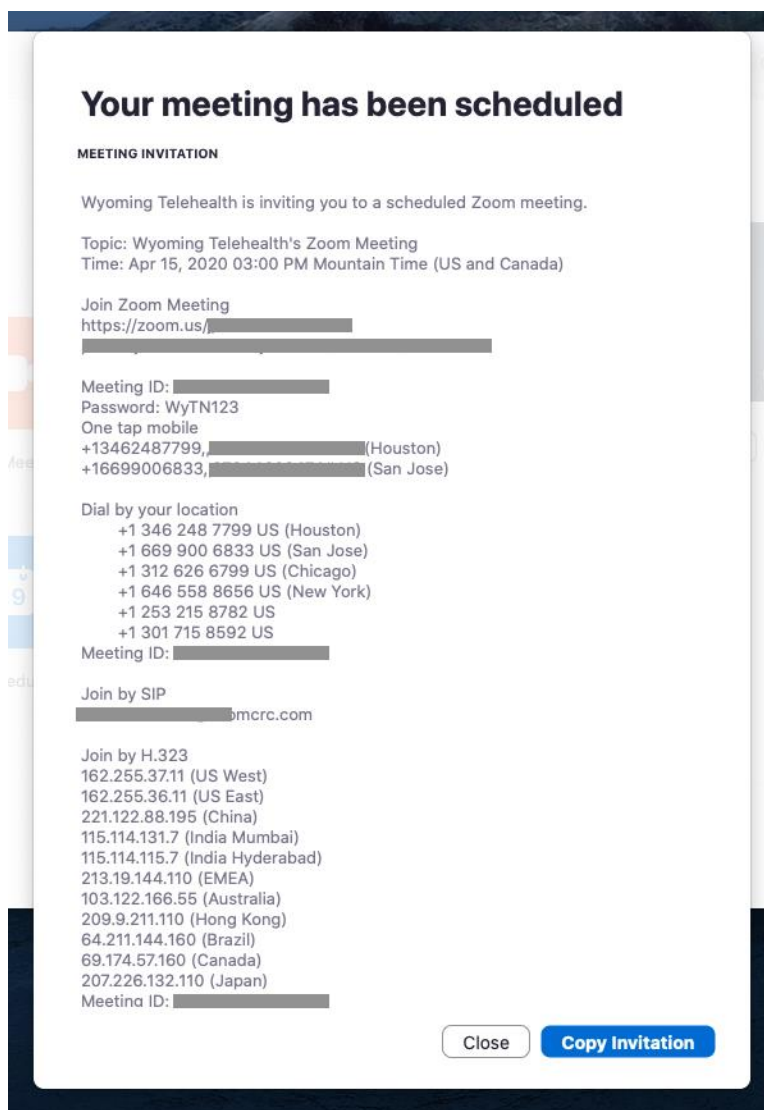
Schedule



Things to keep in mind for scheduling:

- Topics should not include full names or PHI
- You can set up individual meetings or recurring meetings
- Meeting IDs should be thought of as virtual room numbers
 - Thus, using your Personal Meeting ID for every meeting, would be like scheduling your meetings all in the same room
 - This should be considered for security purposes when scheduling meetings
- You may create a password if you choose, to increase security of the meeting
 - Passwords are case sensitive
 - Depending on your settings (which can be reviewed on your profile on the [Zoom.us](https://zoom.us) website), the password can either be imbedded in the meeting link, or set so that it must be entered by the participant after they click the meeting link
- Keep video for hosts and participants **“ON”**
- Keep audio as **“Telephone and Computer Audio”**
- The calendar option you choose will affect how you send the invite, after scheduling the meeting
 - Zoom does not automatically send meeting invites; you must send them from your email or from your own separate online calendar system
 - Choosing a dedicated calendar (**Google, Outlook**), will populate the meeting invite in that calendar app, once you press **“Schedule”**
 - Choosing **“Other Calendars”** will create a copy of the meeting invite that you can copy and paste into an email
- There a number of **“Advanced Options”** you can choose by clicking on the arrow
 - **“Enabling Waiting Room”** lets you admit participants from a virtual waiting room
 - Participants won’t be able to see or hear anything in-meeting until admitted
 - Do not select **“Only authenticated users can join”**
 - Many participants will not have Zoom accounts, so this poses a barrier
 - Other selections are optional based on your preferences
- You may assign **“Alternative Hosts”** with their email address
 - Anyone assigned can open the meeting
 - To be an alternative host, they must have an account with the WyTN
- Choose what the primary purpose of the meeting
 - This will not affect any of your documentation, but an option must be selected

Step 4: Sending the meeting invite.

A screenshot of a Zoom meeting invitation window. The window has a white background with a dark blue header and footer. The header text reads "Your meeting has been scheduled". Below this is a section titled "MEETING INVITATION". The main content area contains the following text: "Wyoming Telehealth is inviting you to a scheduled Zoom meeting.", "Topic: Wyoming Telehealth's Zoom Meeting", "Time: Apr 15, 2020 03:00 PM Mountain Time (US and Canada)", "Join Zoom Meeting", "https://zoom.us/j/ [redacted]", "Meeting ID: [redacted]", "Password: WyTN123", "One tap mobile", "+13462487799, [redacted] (Houston)", "+16699006833, [redacted] (San Jose)", "Dial by your location", "+1 346 248 7799 US (Houston)", "+1 669 900 6833 US (San Jose)", "+1 312 626 6799 US (Chicago)", "+1 646 558 8656 US (New York)", "+1 253 215 8782 US", "+1 301 715 8592 US", "Meeting ID: [redacted]", "Join by SIP", "[redacted]@mcr.com", "Join by H.323", "162.255.37.11 (US West)", "162.255.36.11 (US East)", "221.122.88.195 (China)", "115.114.131.7 (India Mumbai)", "115.114.115.7 (India Hyderabad)", "213.19.144.110 (EMEA)", "103.122.166.55 (Australia)", "209.9.211.110 (Hong Kong)", "64.211.144.160 (Brazil)", "69.174.57.160 (Canada)", "207.226.132.110 (Japan)", "Meeting ID: [redacted]". At the bottom right, there are two buttons: "Close" and "Copy Invitation".

Your meeting invite will show all connection information. Scheduling with **“Other Calendars”** will bring you to the screen above. Clicking **“Copy Invitation”** will copy all information, which you can then paste into an email to the patient.

Scheduling with a dedicated calendar (**Google, Outlook**), will bring you directly to the selected calendar.

The meeting information for any invitation choice will be the same. Meeting information can be edited, once you are in your calendar or email program. Providing additional connection instructions to patients will help them connect.



Note: You can also schedule meetings when you are signed in to your account on the [Zoom.us](https://zoom.us) website. All meeting options are the same. The only difference is that all sending options for the scheduled meeting invite (copying the invitation, sending the meeting invite through a dedicated calendar) appear on the page after you create the meeting.

****For more information from Zoom on scheduling, click [HERE](#) for a tutorial.****