ZOOM SCHEDULING

1. Log in to Zoom with appropriate credentials

2. Select **Meetings** from left sidebar

3. Select **Schedule a New Meeting**

4. Enter in the **patient name** as the **Topic**.

5. Enter in Appointment Date, Time, and Duration

6. Ensure **Generate Automatically** is selected under Meeting ID

7. Under Meeting Options, make sure **Enable join before host** is checked

8. Press **Save**

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11. Copy the link from the Join URL section, as well as the Meeting ID. You can also press Copy Meeting Invitation, and copy everything above Join by SIP to include in your message to the patient. You do not need any details from “Join by SIP” down.

The patient will need:

- Zoom URL
- Meeting ID

12. Paste that information in the patient communication (email is preferred or patient portal) with additional education materials

13. Create an Outlook invite, insert the Zoom link, add the patient name, and send the invite to the scheduled provider

Additional recommendations:

- Provide the patient with a method to contact an individual within the clinic that can provide technical assistance if they experience any trouble
- It may be helpful to include patient contact information in the Outlook invite so they can reach out to the patient if they do not join the Zoom meeting at the scheduled time

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