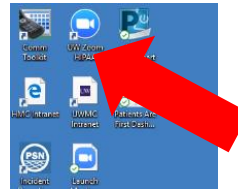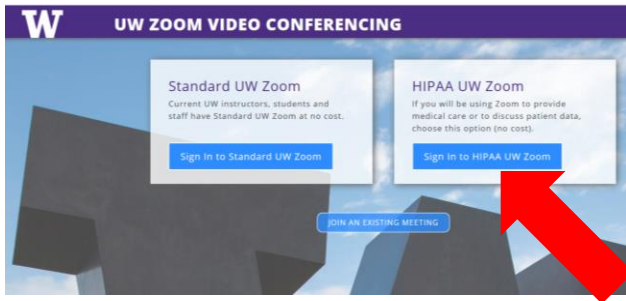# Zoom Job Aid for Telemedicine Visits

This guide covers the following functions for a **recurring** Zoom meeting:
- Initial Meeting Set-up
- Starting a Meeting through the Browser
- Waiting Room Function

Initial Meeting Set-up

1. Open your browser, navigate to **uw-phi.zoom.us** and select **HIPAA UW Zoom; OR** open the UW Zoom HIPAA icon on your UW Medicine desktop

2. Sign in with your UW NetID. **IMPORTANT:** If using a shared Zoom account, use the corresponding UW NetID.
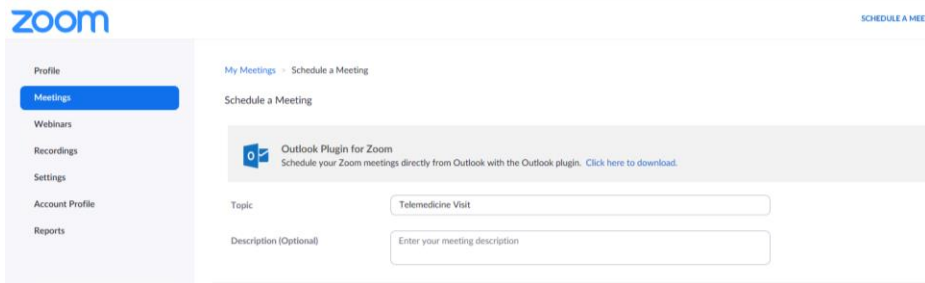
3. Select **SCHEDULE A MEETING**

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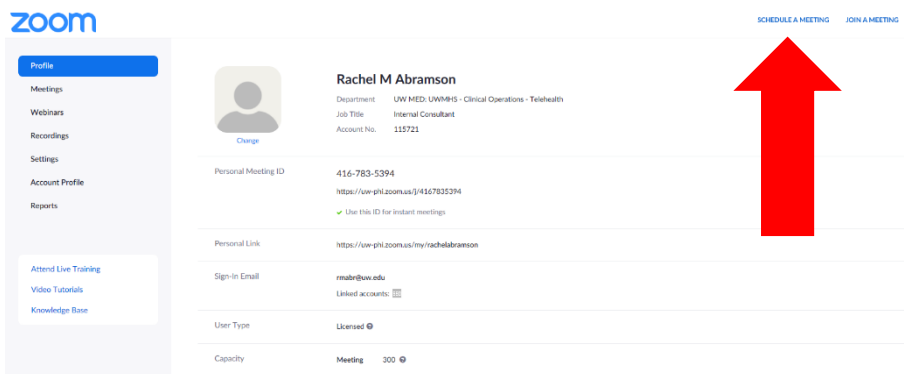
4. In the **Topic** section, **it is recommended** to list something that will remind you of the purpose of this meeting (ex. Telemedicine visit). You can add a description of the meeting in the **Description (Optional)** field if you like.
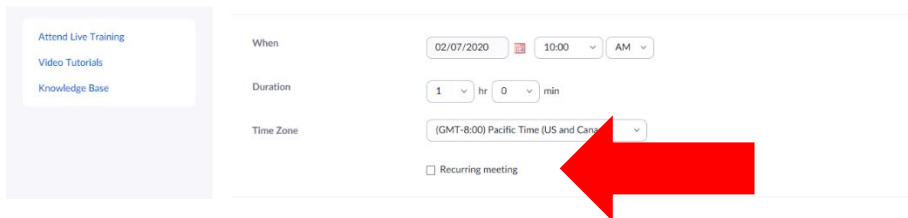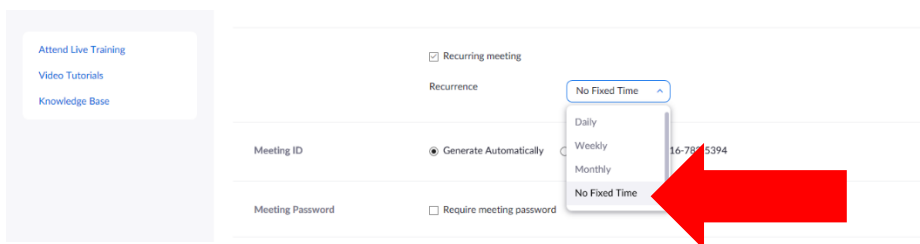

5. Zoom allows you to schedule a meeting on a specific day at a specific time, or for a recurring pattern. Recurrence options for scheduling include: *Daily, Weekly, Monthly,* and *No Fixed Time*. In order to simplify meeting set-up, **it is recommended** to initially set the meeting to recur with *No Fixed Time*.
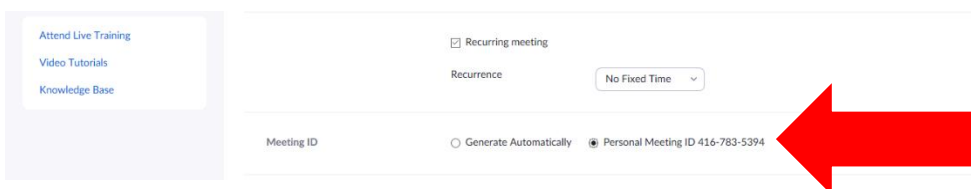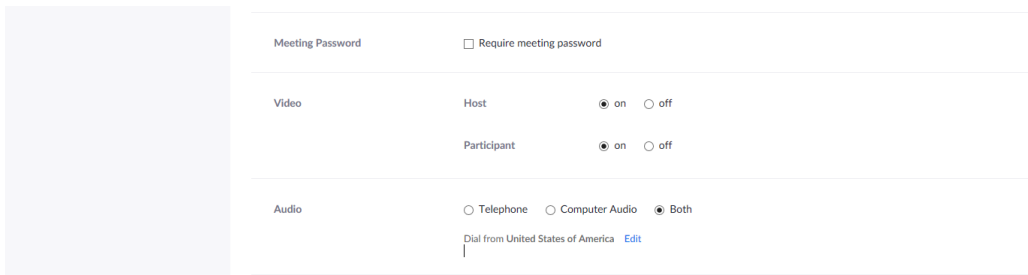   a. Check the box next to **Recurring meeting**

    b. In the drop down next to **Recurrence**, select *No Fixed Time*
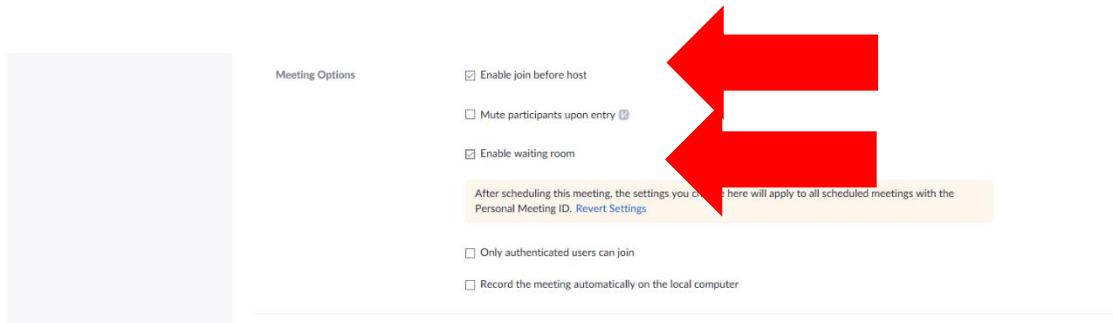

6. In the **Meeting ID** section, select *Personal Meeting ID*

7. In the **Meeting Password** section, leave the box unchecked for *Require meeting password*. In the **Video** section, select *on* for *Host* and *Participant*. In the **Audio** section, select *Both*.

8. **IMPORTANT:** In the **Meeting Options** section, make sure the box next to *Enable join before host* and *Enable waiting room* is checked. Everything else should be unchecked.
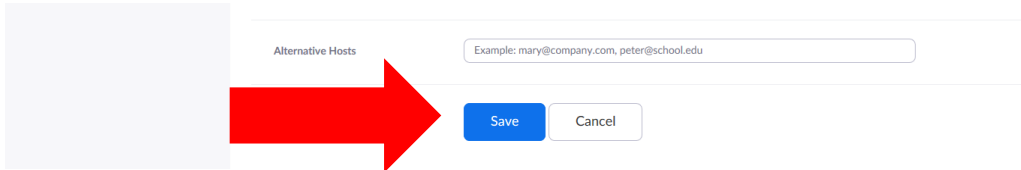
Meeting Options	
	☑ Enable join before host
	☐ Mute participants upon entry
	☑ Enable waiting room
	After scheduling this meeting, the settings you change here will apply to all scheduled meetings with the Personal Meeting ID. Revert Settings
	☐ Only authenticated users can join
	☐ Record the meeting automatically on the local computer

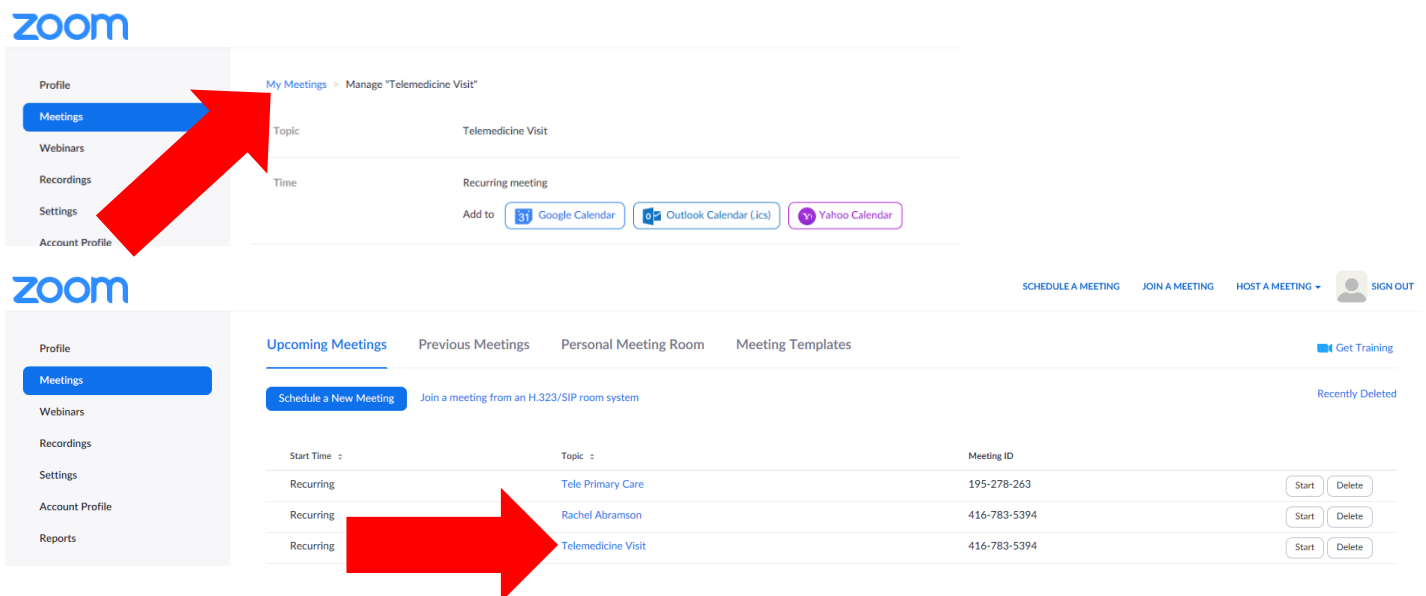9. Leave the **Alternative Hosts** section empty and click **Save**

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

Save   Cancel

10. If you click **My Meetings** at the top of the screen you should see a list of all scheduled meetings including this one.

ZOOM

Profile	My Meetings > Manage "Telemedicine Visit"
Meetings	
Webinars	Topic Telemedicine Visit
Recordings	
Settings	Time Recurring meeting
Account Profile	Add to 31 Google Calendar Outlook Calendar (.ics) Yahoo Calendar

ZOOM   SCHEDULE A MEETING   JOIN A MEETING   HOST A MEETING ▾   SIGN OUT

Profile	Upcoming Meetings Previous Meetings Personal Meeting Room Meeting Templates		Get Training
Meetings	Schedule a New Meeting Join a meeting from an H.323/SIP room system		Recently Deleted
Webinars			
Recordings	Start Time ⇅	Topic ⇅	Meeting ID
Settings	Recurring	Tele Primary Care	195-278-263	Start	Delete
Account Profile	Recurring	Rachel Abramson	416-783-5394	Start	Delete
Reports	Recurring	Telemedicine Visit	416-783-5394	Start	Delete
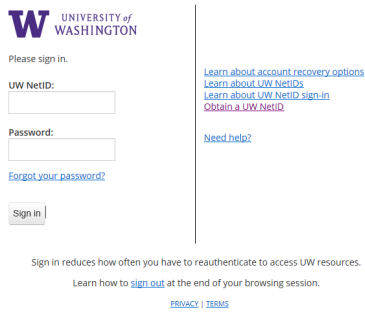
Start a Meeting through the Browser

1. Open your browser, navigate to **uw-phi.zoom.us** and select **HIPAA UW Zoom; OR** open the UW Zoom HIPAA icon on your UW Medicine desktop
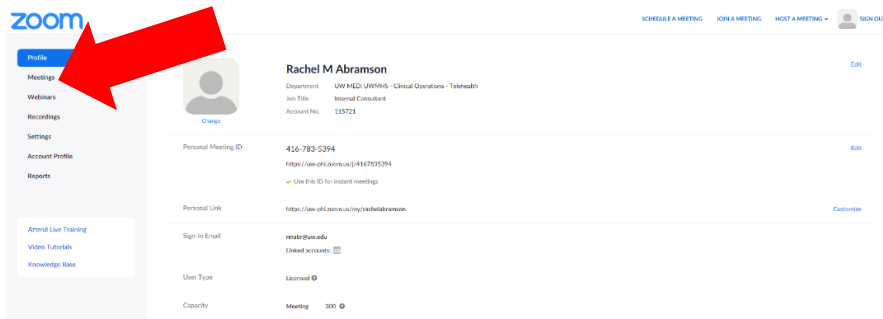
UW ZOOM VIDEO CONFERENCING

Standard UW Zoom
Current UW instructors, students and staff have Standard UW Zoom at no cost.
Sign In to Standard UW Zoom

HIPAA UW Zoom
If you will be using Zoom to provide medical care or to discuss patient data, choose this option (no cost).
Sign In to HIPAA UW Zoom

JOIN AN EXISTING MEETING

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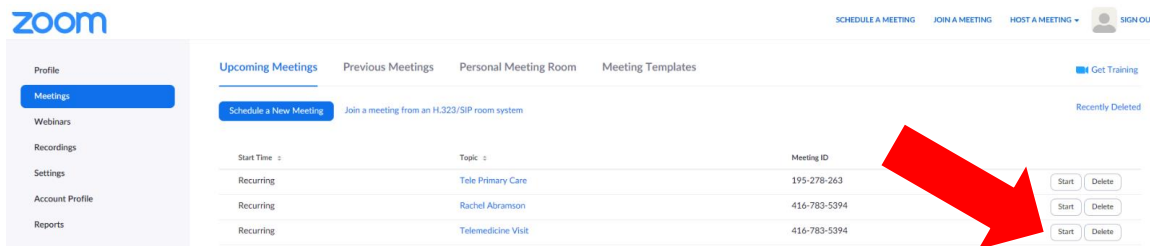2. Sign in with your UW NetID. **IMPORTANT:** If using a shared Zoom account, use the corresponding UW NetID.
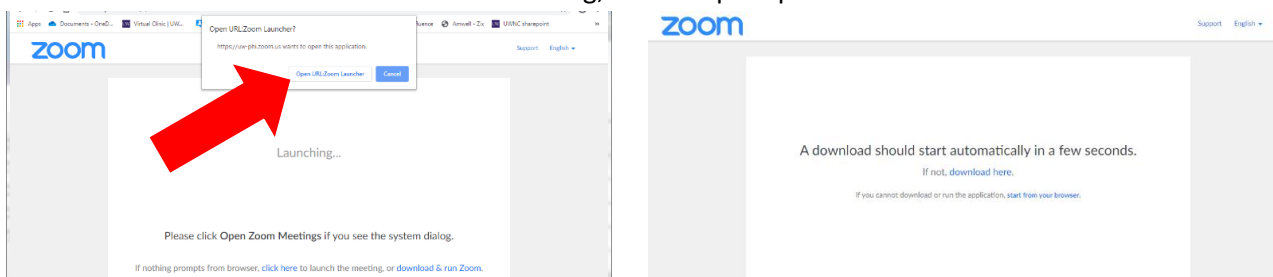
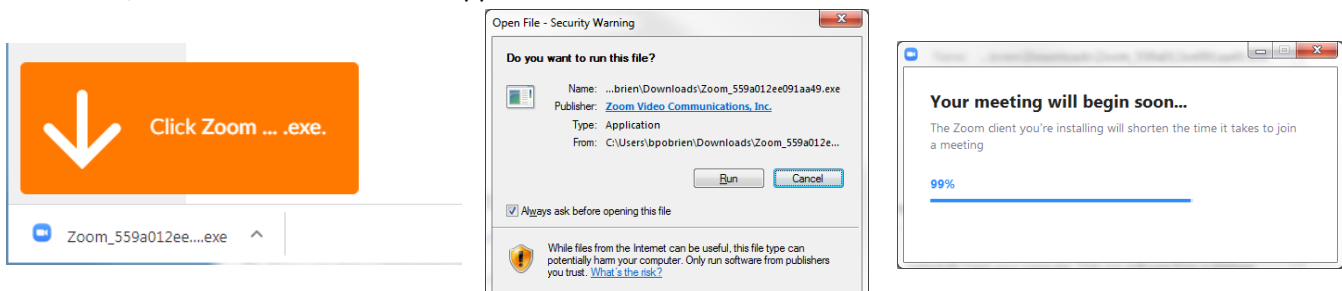

3. Select **Meetings**

4. Click **Start** next to the appropriate meeting

5. You will see a pop-up asking to Open URL: Zoom Launcher if Zoom hasn't been previously installed. Click **Open URL: Zoom Launcher**. It should then start downloading; this is a quick process.
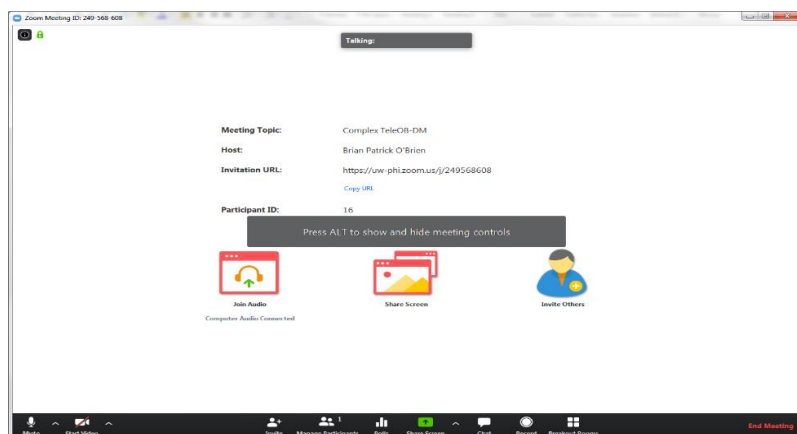

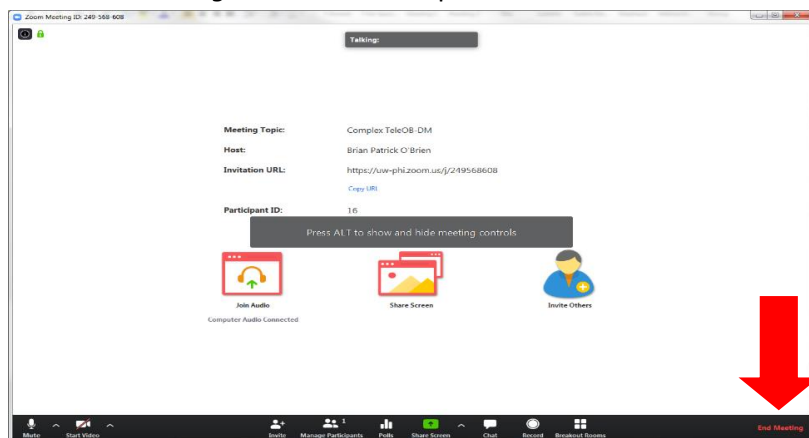6. Download, Install and Run the Zoom Application

7. If using a headset for the visit, click *Join with Computer Audio*. If using a conference phone for the visit, click *Phone Call* and then dial the number given on the conference phone.
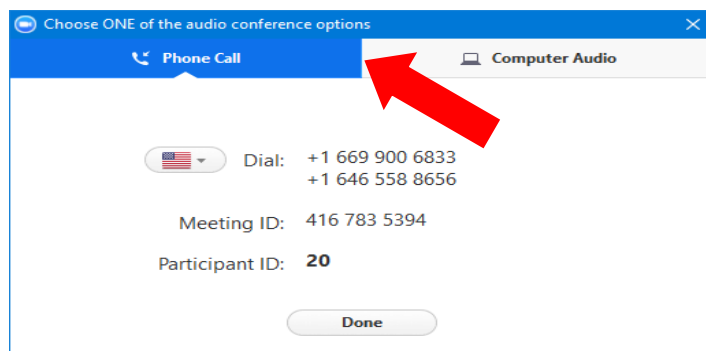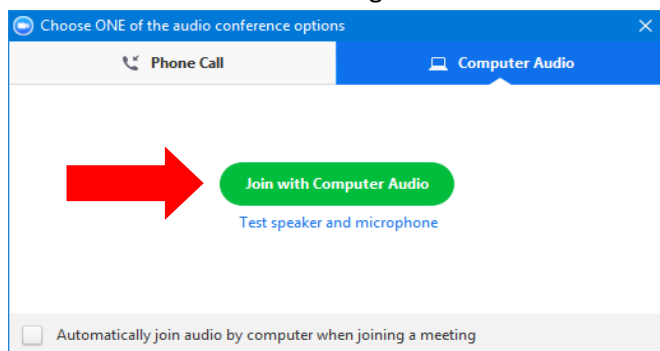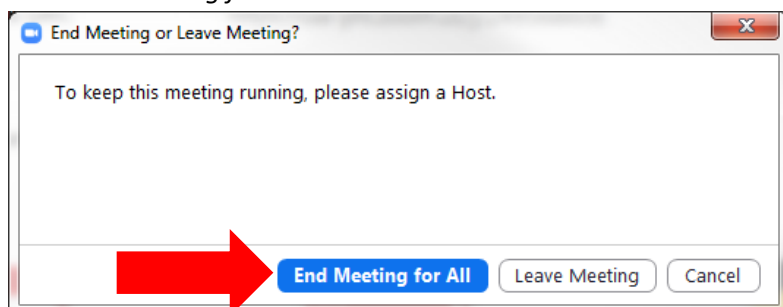

8. You will now be in the visit

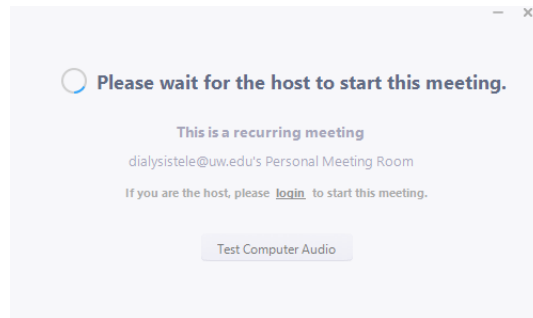9. Click *End Meeting* when visit is complete

10. Click *End Meeting for All*

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Waiting Room Function

The waiting room feature allows you to control when a patient joins the meeting. Patients see the screen below while they are in the waiting room. Patients can test their audio and video in the waiting room.
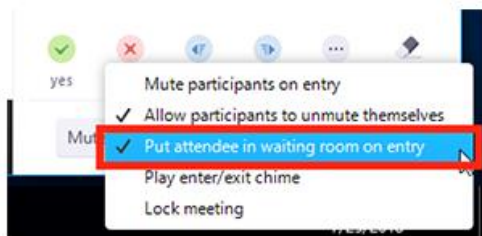

1. If your account is configured correctly, the waiting room feature should work automatically. If you need to turn it on during a visit:
   a. Click **Manage Participants** in the lower navigation bar of the Zoom meeting.

   b. Click **More** at the bottom of the participant's window and choose **Put Attendees in Waiting Room on Entry**.


2. To admit a patient from the waiting room, click **Manage Participants** in the navigation bar of the Zoom meeting.


3. You will see the patient in the waiting room. Hover over the patient name and click **Admit**.
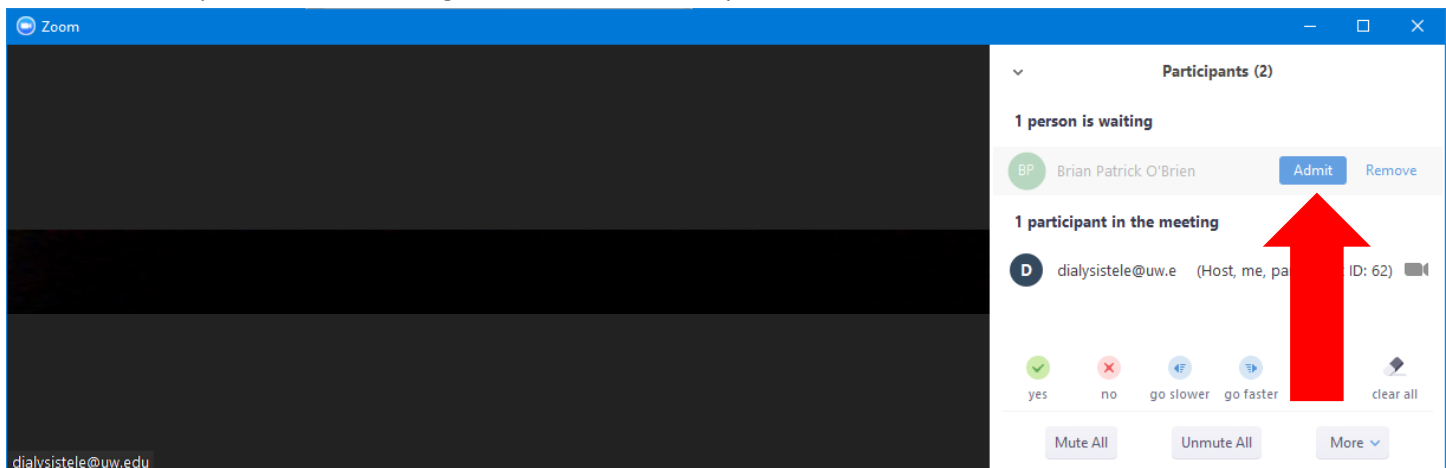
4. If more than one patient has dialed into the Zoom meeting, you can admit them one by one. Hover over the patient that you want to admit, and click **Admit** to allow *that* patient to enter the meeting room.
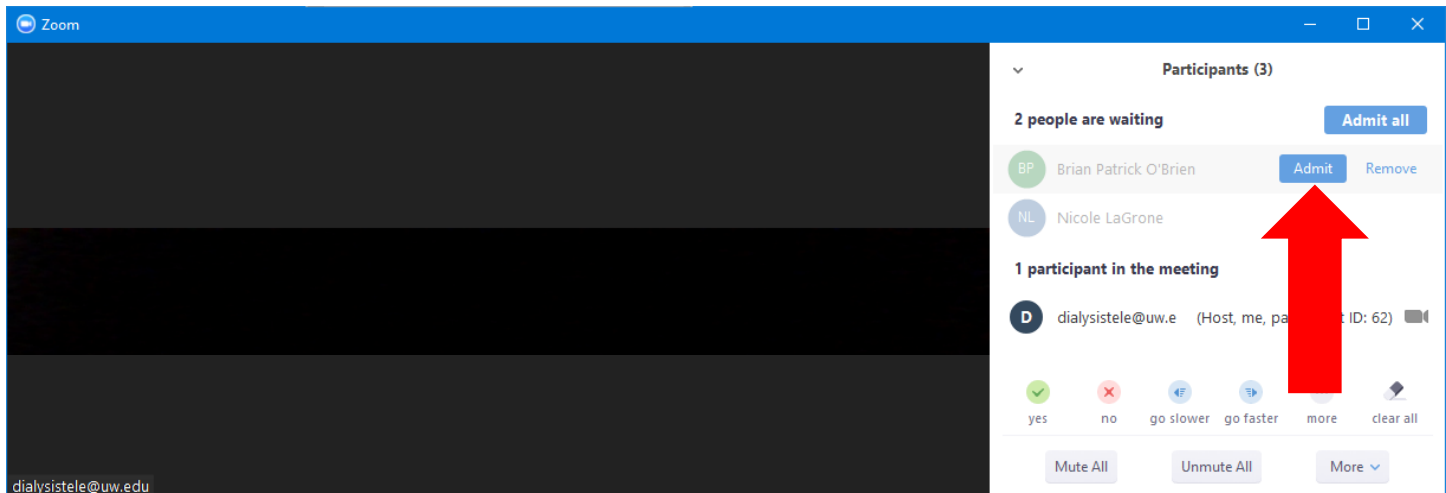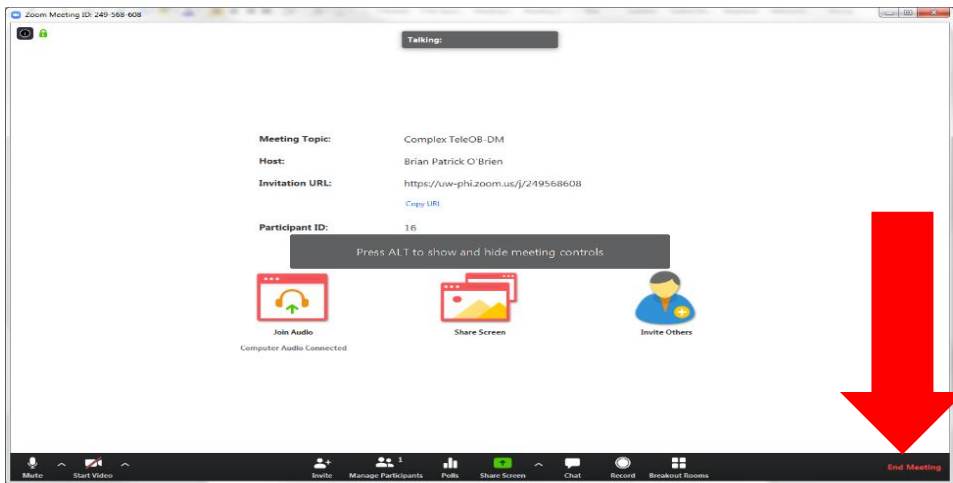

5. After the patient joins the visit, ask the patient for a call back number should you have technical issues or get disconnected during the visit.

6. If you need to put the patient back in the Waiting Room, hover over the patient and click **More**, then click **Put in Waiting Room**.
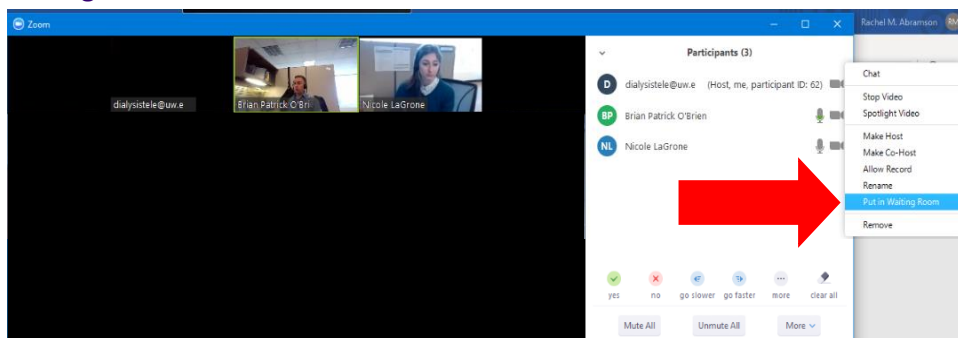
7. When done with the visit, you can remove the patient from the visit by hovering over the patient and clicking **More**, then clicking **Remove**. A popup will appear asking if you want to remove the patient, click **Yes**. Removing the patient will allow you to keep the Zoom visit open for another patient.

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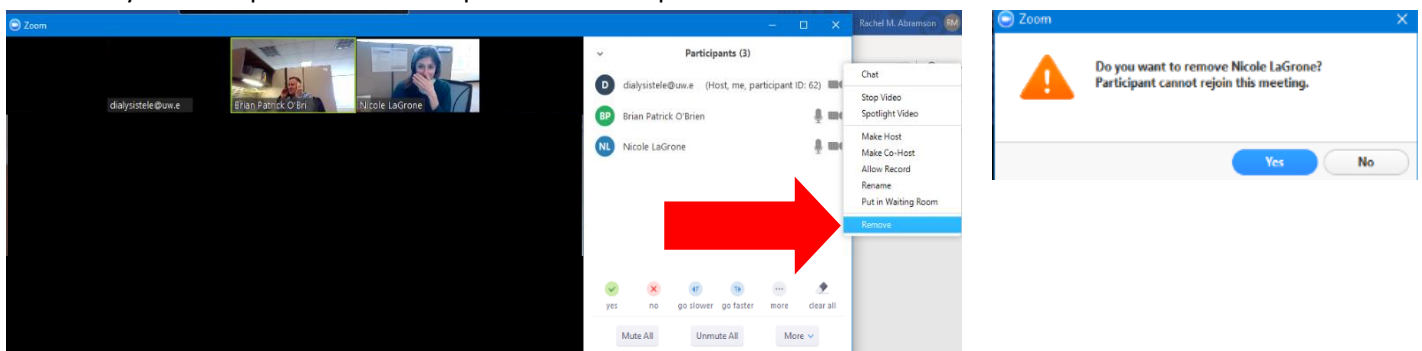
8. To end *and* close the Zoom visit, click **End Meeting**

9. Click **End Meeting for All**

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