Templates for scheduling virtual health visits

Purpose

A meeting template allows you to save certain details of a previously scheduled virtual health visit and apply it to future virtual health visits. You can save up to 40 meeting templates.
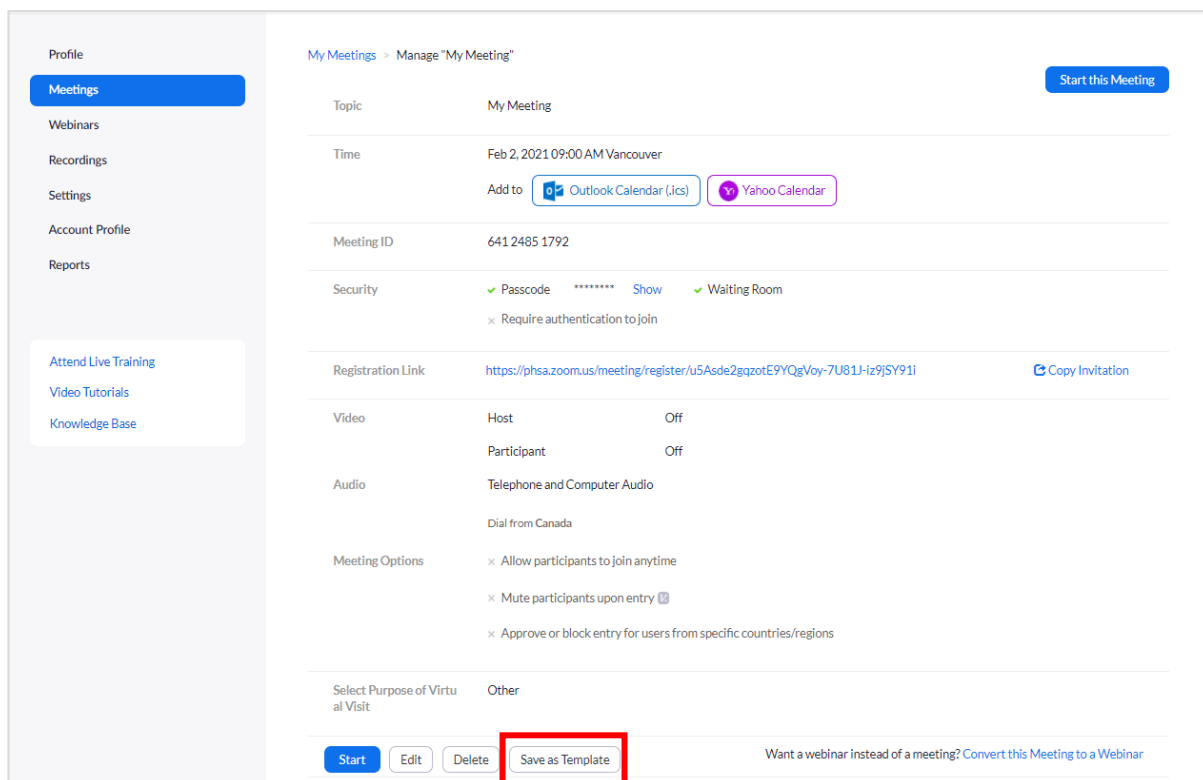
Requirements

- Use the **web browser** version of Zoom to create meeting templates and schedule using meeting templates.
    o The **desktop application** does not include this option.

Schedule the virtual health visit

1. Follow steps 1-5 to schedule the virtual health visit.
2. If **polls** are required, you can create questions and answers in advance. This saves to the template.
3. If **registration** is required, adjust **Registration options**. This saves to the template.

Save the virtual health visit as a meeting template

1. Click **Save as a Meeting Template.**

ZOOM Zoom for Healthcare created by Office of Virtual Health – Education, **Effective date**: June 7, 2022
This material has been prepared solely for use at Provincial Health Services Authority (PHSA). A printed copy of this document may not reflect the current electronic version.

Page ◆ 33

2. Modify the meeting template name as required.
3. Click **Save as Template.**

Save as a Meeting Template   ×

This template will copy all settings from the original meeting except for Alternative Hosts and Time.

Template Name   **2**   Virtual Health Visit

3   Save as Template   Cancel

4. The meeting details saved to the template include:

Meeting details **applied** from template: (Can be edited as required)	Meeting details **not applied** from template: (Must be manually entered for every meeting)
- Topic - Description - Recurrence - Registration preference - Video - Audio - Meeting options	- Date and time - Scheduled for - Alternative hosts - Purpose of virtual health visit

5. Finish the remaining scheduling activities for the virtual health visit, e.g. inviting participants.

Schedule a new virtual health visit using a meeting template

1. Follow steps 1-3 to schedule the virtual health visit.
2. In the **Template** field, select your meeting template

Template   Select a template   ^

                None

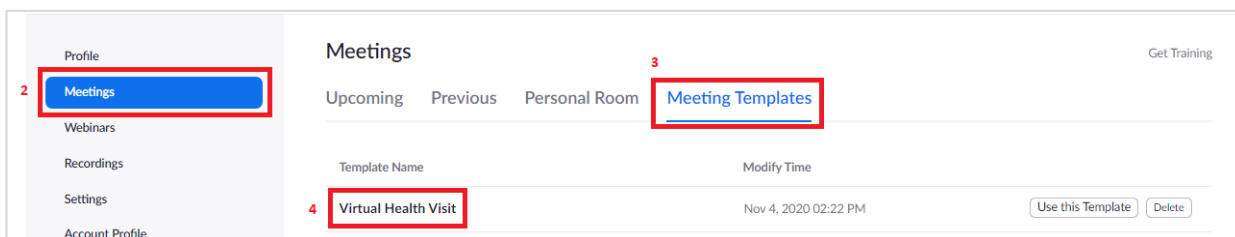Security   Zoom VH Visit

3. Re-check the meeting details.
4. Click **Save** when all virtual health visit meeting details are completed.
5. Adjust template **poll** questions and answers if required.
6. Adjust template **Registration options** if applicable and required.
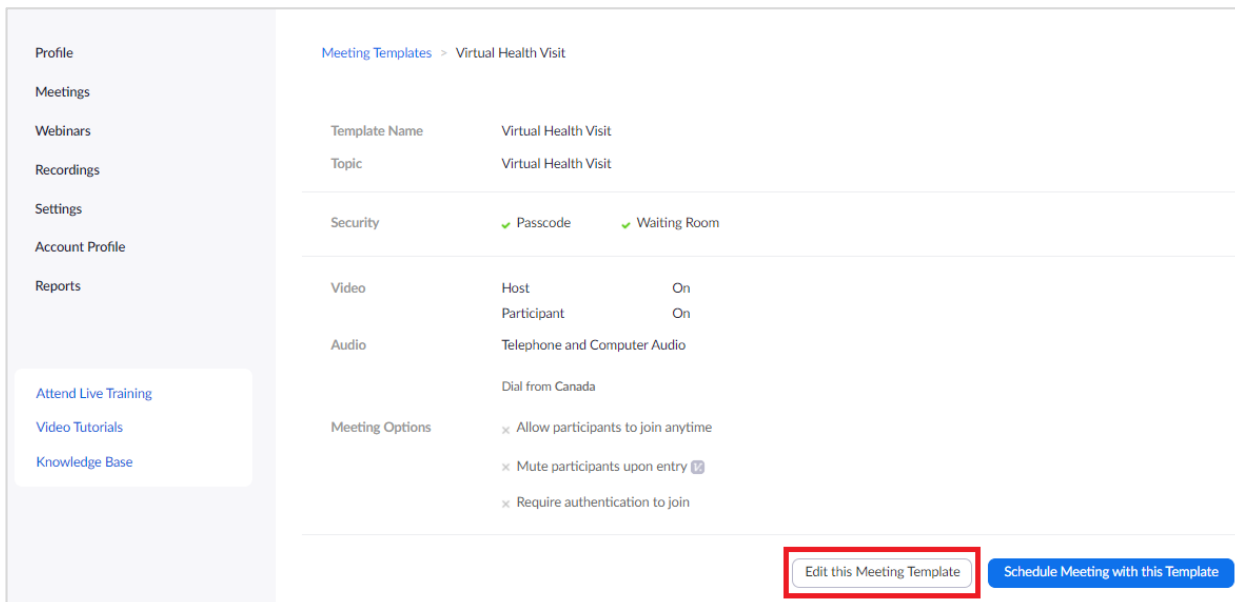
Providing support for Zoom for Healthcare to:

7. Finish the remaining scheduling activities for the virtual health visit, e.g. inviting participants.

Editing meeting templates

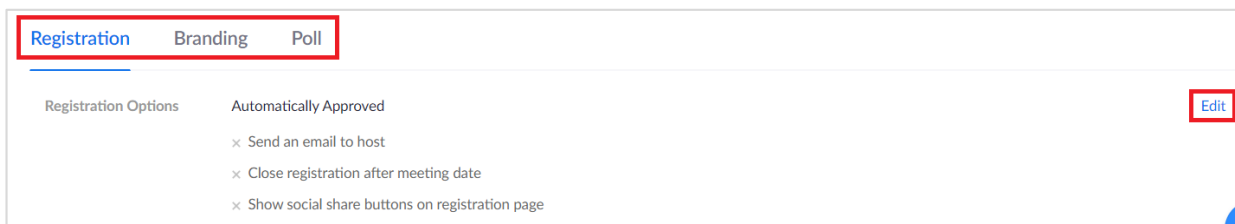1. Sign into your Zoom for virtual health visits account on the web browser - https://zoom.us/
2. Click on the **Meetings** tab.
3. Click **Meeting Templates**.
4. Click the name of the template you wish to edit.

Profile	Meetings				Get Training
	Meetings			3	
	Upcoming	Previous	Personal Room	Meeting Templates	
	Webinars				
	Recordings				
		Template Name		Modify Time	
	Settings				
	Account Profile	4 Virtual Health Visit		Nov 4, 2020 02:22 PM	Use this Template Delete

5. Click **Edit this Meeting Template** and edit details such as topic, description, recurrence, purpose of the virtual health visit, etc.

Profile		Meeting Templates > Virtual Health Visit
Meetings		
Webinars	Template Name	Virtual Health Visit
Recordings	Topic	Virtual Health Visit
Settings		
Account Profile	Security	✔ Passcode ✔ Waiting Room
Reports		
	Video	Host On
		Participant On
Attend Live Training	Audio	Telephone and Computer Audio
Video Tutorials		Dial from Canada
Knowledge Base	Meeting Options	✕ Allow participants to join anytime
		✕ Mute participants upon entry
		✕ Require authentication to join

Edit this Meeting Template   Schedule Meeting with this Template

6. Make all required changes and click **Save.**
7. If applicable, click the **Edit** button within **Registration** and **Poll** to edit details.

Registration Branding Poll		Edit
Registration Options	Automatically Approved	
	✕ Send an email to host	
	✕ Close registration after meeting date	
	✕ Show social share buttons on registration page	

zoom Zoom for Healthcare created by Office of Virtual Health – Education, **Effective date**: June 7, 2022
This material has been prepared solely for use at Provincial Health Services Authority (PHSA). A printed copy of this document may not reflect the current electronic version.

Page ◆ 35

Deleting meeting templates

1. Sign into your Zoom for virtual health visits account on the web browser - https://zoom.us/
2. Click on the **Meetings** tab.
3. Click **Meeting Templates**.
4. Click **Delete** for the template you wish to delete.
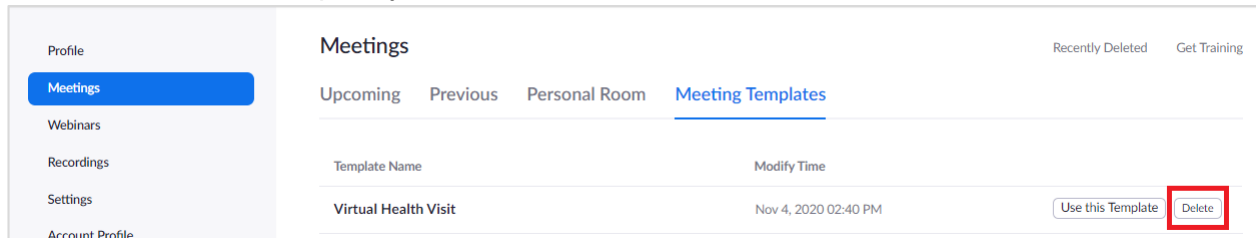
5. Click **Delete** again to confirm you want to delete the template.