ZOOM FOR HEALTHCARE CHECKLIST

This checklist will guide you through **scheduling a virtual appointment**.

OFFER THE VIRTUAL APPOINTMENT

- ☐ Provide the patient the option to attend the appointment virtually.
    - A free, web-based program called Zoom for Healthcare
- ☐ Ask if they have the technical requirements:
    - Smartphone/table & free Zoom App (download from Google Play or Apple App Store) OR computer/laptop & internet browser/free desktop App.
    - Headphones/speakers and microphone (built-in)
    - Webcam OR built-in video camera
    - High-speed internet or 4G LTE connections
    - IMPORTANT: Patients are responsible for any charges related to their internet data usage. If patients are using data on a mobile device (instead of a wireless "Wi-Fi" connection) they should be aware that video streams require significant data.
- ☐ If yes, ask the patient for verbal consent to communicate via email.
- ☐ Obtain the patient's email address.
- ☐ Provide the patient with the appointment date & time.
- ☐ Explain the patient will receive an email that will include:
    - A link to their Zoom for Healthcare appointment (follow the instructions and test their device)
    - A Patient Information Guide
- ☐ Ask the patient if they have any questions.

SCHEDULE THE APPOINTMENT IN ZOOM

- ☐ Log-in to Zoom desktop
- ☐ Click **Schedule**; update the following:
    - **Topic** (do not include any patient identifiers or health information)
    - Appointment **date & time**
    - **Duration** of the appointment
    - If scheduling on behalf on someone, select **Advanced Options**
        - ▪ Check the **Schedule For** box
        - ▪ Ensure the correct person is listed (that you are scheduling for)
    - Click **Schedule**.
- ☐ Select **Copy to Clipboard**.

SEND THE EMAIL INVITATION

- ☐ Open an email from the appropriate email account.
- ☐ Paste the Zoom details inside the email body.
- ☐ Type the email address(es) of the patient (and any other participant, as appropriate) into the 'To' field.
- ☐ Type the Subject (do not include any patient identifiers or health information) e.g. Virtual Appointment with [Patient Initials].
- ☐ Copy & Paste the Email template (found on the virtual care website) into the email body (update the green text).
- ☐ Attach the Patient Information Guide to the email (if it is the first virtual appointment).
- ☐ Send the email.

Prince Edward Island CANADA

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