

GETTING STARTED GUIDE iOS: ZOOM & HOW TO SCHEDULE A MEETING

UPDATED: 04/14/20

DETAILS: Quick guide to install Zoom, Schedule and Execute a Meeting for iOS mobile devices.

If interpreter services are needed while using Zoom, click [here](#) for directions.

Use the Links below to take you directly to that page

Pages 1-2: [Setting up Zoom on your iOS device](#)

Pages 3-5: [How to Schedule a Meeting](#)

Pages 5-6: [Executing a Zoom Meeting & Appendix: Settings](#)

Setting up Zoom on your iOS device

1) Download Zoom Cloud Meetings App

<https://zoom.us/support/download>

To obtain an AAH Zoom License and/or to get Zoom pushed out to your AAH device, please email AAH-zoomintake@aaah.org. In your email please include **1. your business reason for needing Zoom, 2. your AAH workstation ID and 3. your AAH email (no personal emails)**. For all other inquiries regarding video visits (Haiku/Canto/Zoom, etc) please contact the Service Desk Physician Hotline at WI: 414-647-3035, Opt.3 or IL: 630-990-7020, Opt. 3

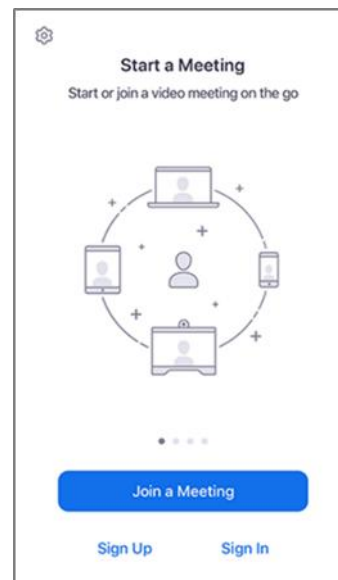


2) Sign in and Join

Open the Zoom app and sign into your AAH account to access all features. You **MUST** have a corporate account to remain HIPAA compliant.

NOTE: DO NOT SIGN UP FOR A PERSONAL ZOOM ACCOUNT.

You can join a meeting without signing in. Tap the gear icon to access basic meeting settings if you join without signing in.



3) Permissions Requested by the Zoom Mobile Client

The Zoom Mobile Client may ask you to authorize access to the following permissions via a pop-up, depending on which features you are accessing in Zoom. You can enable these options before-hand or at your overall discretion by going to **Settings > Zoom** on your device. The following permissions are requested by Zoom:

Location- Allows Zoom to access your location, so it can generate an Emergency Response Location, for when dialing emergency services from Zoom phone.

Contacts - Utilized for Phone Contact Matching (not available for iPads or iPadOS).

Calendars- Allows Zoom to add a meeting as an event in the Calendar app, when a Zoom meeting is scheduled. **Select “OK”**

Photos- Allows Zoom the ability to access your local photo albums, for adding images to chat messages, or for screen sharing during a meeting or webinar.

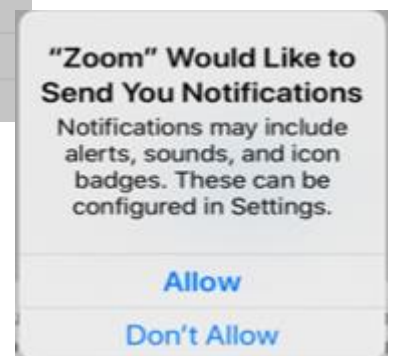
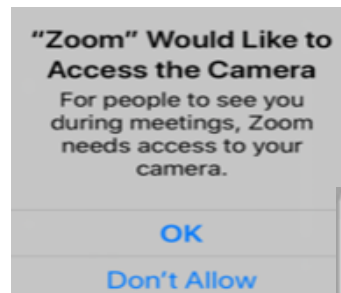
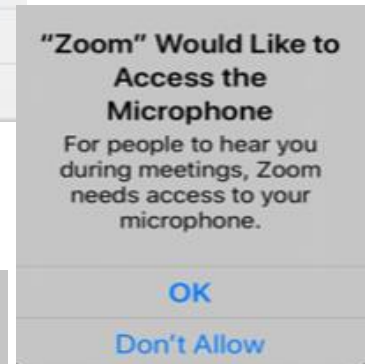
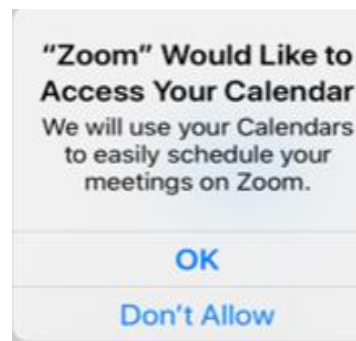
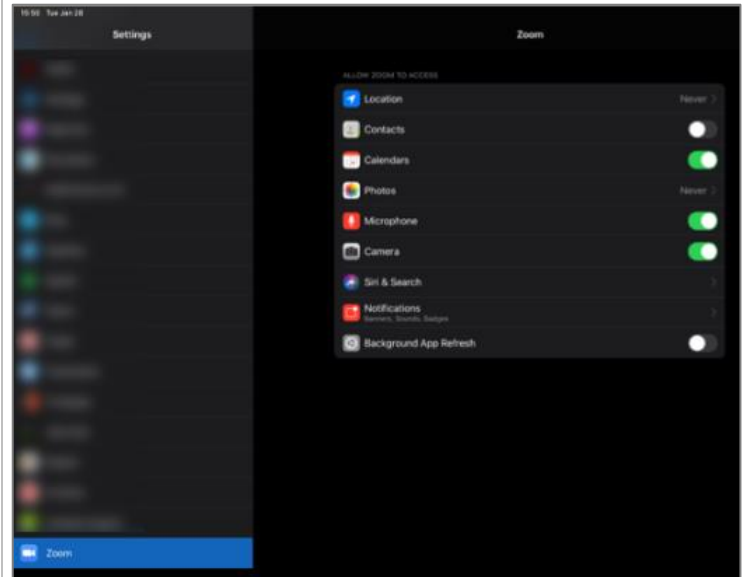
Microphone - Joining using built-in audio devices in a meeting or webinar. **Select “OK”**

Camera - Sharing your video in a meeting or webinar. **Select “OK”**

Siri & Search - Enables the ability to add Siri Shortcuts including Join the Next Meeting, View Today's Meetings, Start My Personal Meeting.

Notifications- Allows Zoom the ability to display notifications for chat messages, upcoming meetings, and more. **Select “Allow”**

Background App Refresh- Allows for notifications for Meeting invites when the app is closed and not active



How to Schedule a Meeting

1) Login to the Zoom app on your iOS device

Click on the **Schedule** icon



Schedule

2) Select Meeting Options

Note that some of these options might not be available if they were disabled and locked to the off position at the account or group level.

Topic: Enter a topic or name for your meeting.

Starts: Select the date and time of your meeting.

Duration: Choose the approximate length of your meeting. This is for scheduling purposes only. The meeting will not end after this length of time has passed.

Timezone: By default, zoom will use your device's time zone setting. Tap on this field.

Repeat: Choose if you would like a recurring meeting (meeting ID will remain the same for each session).

Personal meeting ID: Meeting ID should **ALWAYS** Generate Automatically, do **NOT** use a personal ID

Host Video On when starting: Toggle on if you want the host video on by default when joining the meeting.

Attendee Video On when joining: Toggle on if you want the attendee video on by default when joining the meeting.

Audio Option: Choose whether to allow users to call in via Device audio, Telephone, or Both.

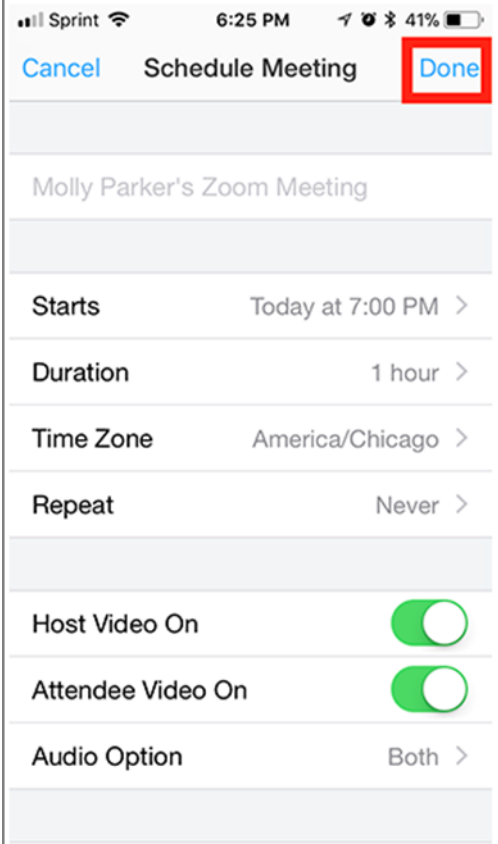
Meeting Password (Required): You can select and input your password here. Participants will be required to input this before joining your scheduled meeting. Ensures only you and your patient can enter the meeting.

Advanced Options: Click to view additional meeting options.

Allow join before host: Allow participants to join your meeting before you. *This should be turned off so no one can enter the meeting.*

Schedule for: If you have scheduling privilege for another Zoom user, you will have the scheduling privilege option and can choose who you want to schedule for.

Alternative Hosts: Select users in the same organization to allow them to start the meeting in your absence.



3) Finish Scheduling

Tap **Done** to finish scheduling.

You are prompted to add the meeting to your iOS calendar, where you can invite attendees.

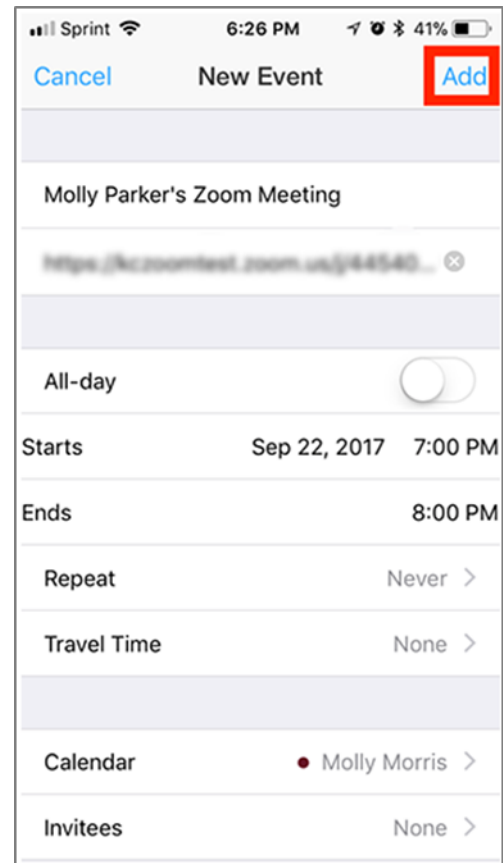
Note: If you are not able to add the meeting to your iOS calendar, navigate to **Settings > Privacy > Calendars** on iOS and enable Zoom.

Notes:

A non-recurring meeting ID will expire 30 days after the meeting is scheduled for. You can restart the same meeting ID as many times as you would like, within the 30-day period.

A recurring meeting ID will expire 365 days after the meeting is started on the last occurrence. You can re-use the meeting ID for future occurrences.

Scheduled meetings can be started at any time before the scheduled time. The links will not expire or become invalid unless it is past the 30 day period for a non-recurring meeting, has not been used for over 365 days for a recurring meeting, or has been deleted from your Zoom account. An instant meeting link will expire as soon as the meeting is over.



4) Send the Patient a Meeting Invite

Click on the **Upcoming** icon.



5) Copy the Invitation

Select the meeting that you want to copy the invitation for.

Tap Invitees

Select **Send Email**. Be sure you send the email using Encryption guidelines.

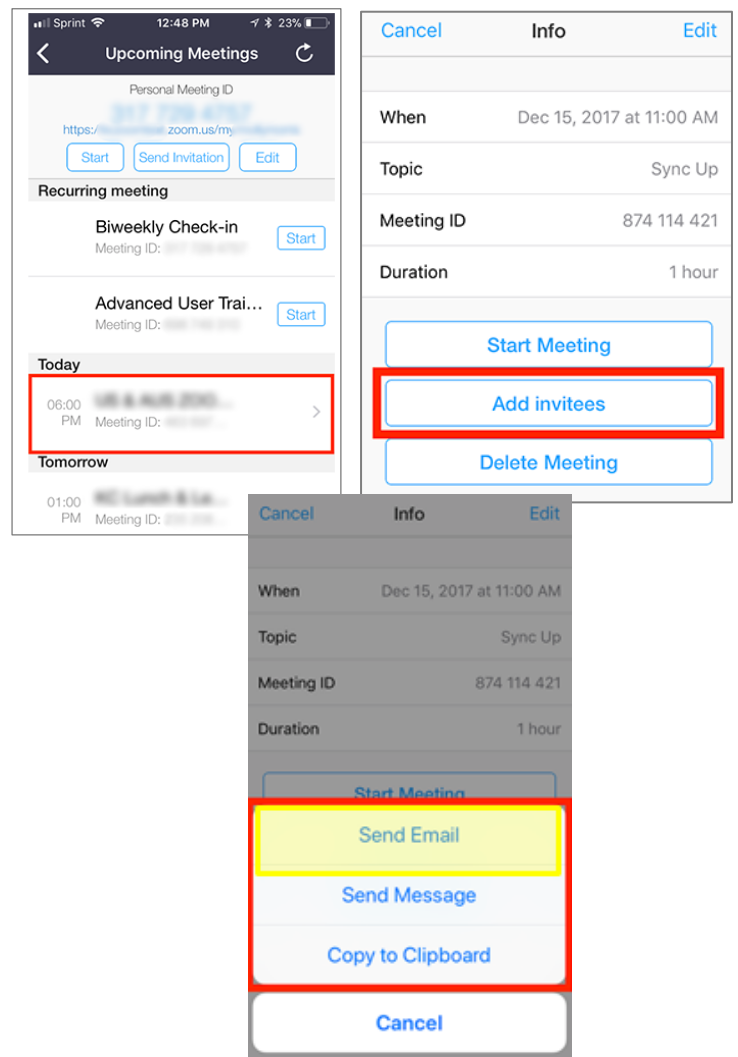
Aurora email users: when sending an email with PHI, type [encrypt] in the subject line to encrypt the email.

Advocate email users: when sending an email with PHI, type phi-encrypt in the subject line to encrypt the email

*Don't include any confidential information in the subject line.

Contact the Service Desk if you to continually send confidential data.

Note: You can edit, start, or delete meetings you are the host of.

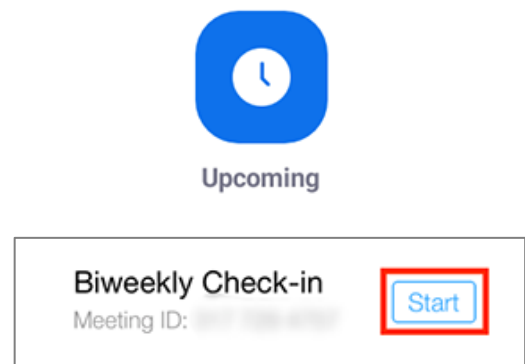


Executing a Meeting

1) Start the Meeting

Open the App and click on the **Upcoming** icon.

Click **Start** next to the meeting you want to start.



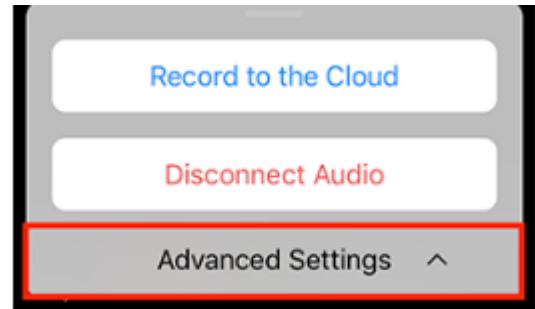
2) During Meeting Options

On your iPhone, the host controls will appear at the bottom of your screen, except for End Meeting (appear at top). On an iPad, they will appear at the top of your screen.

Using the **More** tab, you can click on **Advanced Settings** to use the below options:

Lock Meeting: prevent any new participants from joining the meeting.

Put Attendee in Waiting Room on Entry: have participants enter a waiting room where you can admit them.

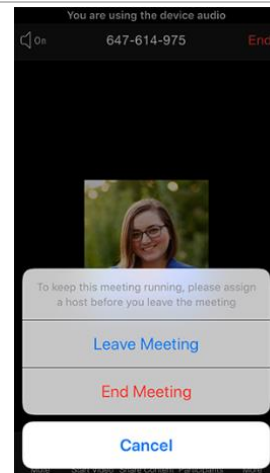


3) End the Meeting

Click on **End** at the top of your screen.

Click **End Meeting** to end the meeting completely.

To keep the meeting running, you would need to assign a host before you choose **Leave Meeting**.



Appendix: Settings

Tap **Settings** to view meeting settings.

Tap your name to change your profile picture, name, and password.

Meetings: Change settings for enabling/disabling your microphone, speaker, or video when you join a meeting.

Contacts: Find phone contacts that are using Zoom and approve contact requests.

Messages: Enable or disable link preview in chat messages.

Notifications: Change when Zoom notifies you of new messages.

General: Enable/disable integrated calling or blur snapshot on task switcher

About: View the app version and send feedback.

