

## How to Schedule a Zoom Meeting for Another Provider

**\*\*Please see the tutorial on “How to Assign a Scheduler in Zoom” before following this tutorial. You will not be able to schedule for any providers who have not designated you as a scheduler in their profile.**

**Step 1:** Log into Zoom.us and use the menu on the left to navigate to the “My Meetings” page. You will see the page below, listing any upcoming or recurring meetings.

The screenshot displays the Zoom.us interface. At the top, there is a navigation bar with the Zoom logo and links for SOLUTIONS, PLANS & PRICING, CONTACT SALES, SCHEDULE A MEETING, JOIN A MEETING, HOST A MEETING, and a user profile icon with a SIGN OUT button. Below the navigation bar is a sidebar menu with various options: My Profile, My Meeting Settings, My Meetings (highlighted with a red box), My Recordings, My Webinars, Room Management, Zoom Rooms, Calendar Integration, Digital Signage Content, Cisco/Polycom Rooms, User Management, Users, Group Management, Account Management, Account Profile, Account Settings, Billing, IM Management, Dashboard, Reports, Scheduling Tracking Fields, and Advanced. The main content area is titled 'Upcoming Meetings' and includes tabs for 'Previous Meetings' and 'Personal Meeting Room'. A 'Get Training' button is visible in the top right. A 'Schedule a New Meeting' button is present, along with a link to 'Join a meeting from an H.323/SIP room system'. Below this, there is a 'Show meetings by host: All' dropdown. The meeting list has columns for Start Time, Topic, Meeting ID, and action buttons. The meetings listed are:

Start Time	Topic	Meeting ID	Actions
Recurring	Wyoming Telehealth Consortium Quarterly Meeting	[Redacted]	Start Delete
Recurring	WyTN Diabetes Education ZOOM Meeting	[Redacted]	Start Delete
Recurring	WyTN Champions Meeting	[Redacted]	Start Delete
Recurring	WyTN Webinar	[Redacted]	Start Delete
Recurring	Allied Health Professionals Telehealth Advocacy Meeting	[Redacted]	Start Delete
Today 2:00 PM	Meeting to Discuss WyTN Webinar	[Redacted]	Join End
Today 3:00 PM	My Meeting	[Redacted]	Start Delete
Tue, Apr 9 (Recurring) 12:00 PM	Monthly WyTN Technical Assistance and Q&A	[Redacted]	Start Delete
Tue, May 14 (Recurring) 12:00 PM	Monthly WyTN Technical Assistance and Q&A	[Redacted]	Delete
Tue, Jun 11 (Recurring) 12:00 PM	Monthly WyTN Technical Assistance and Q&A	[Redacted]	Delete
Tue, Jul 9 (Recurring) 12:00 PM	Monthly WyTN Technical Assistance and Q&A	[Redacted]	Delete
Tue, Aug 13 (Recurring) 12:00 PM	Monthly WyTN Technical Assistance and Q&A	[Redacted]	Delete

**Step 2:** Click on the blue “Schedule a New Meeting” button, located near the top of the “Upcoming Meetings” tab.

Home Profile My Meetings Meeting Settings Recordings Webinars Room Management

Upcoming Meetings Previous Meetings Personal Meeting Room

**Schedule a New Meeting** Join a meeting from an H.323/SIP room system

Show meetings by host: All

Start Time Topic

Recurring Wyoming Telehealth Consortium Quarterly Meeting

When you click this button, the following page should load:

zoom SOLUTIONS PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING

My Profile My Meeting Settings My Meetings My Recordings My Webinars Room Management Zoom Rooms Calendar Integration Digital Signage Content Cisco/Polycom Rooms User Management Users Group Management Account Management Account Profile Account Settings Billing IM Management Dashboard Reports

My Meetings > Schedule a Meeting

### Schedule a Meeting

Topic

Description (Optional)

When

Duration  hr  min

Time Zone

Recurring meeting

Registration  Required

Video Host  on  off

Participant  on  off

**Step 3:** Fill in the Topic, an optional Meeting Description, the time, date, and timezone, duration of the meeting, and whether the meeting is recurring.

The “Video” options allow you to decide whether to automatically have the participants’ video feeds turned on or off upon entering the Zoom room.

**Step 4:** Scroll to the bottom of the current page, until you see the blue text, “Advanced Options.” Click on this text to expand the section.

The screenshot shows the Zoom meeting scheduling interface. On the left, there is a navigation menu with the Zoom logo and links for SOLUTIONS, PLANS & PRICING, CONTACT SALES, and a toggle for 'Require meeting password'. Below the menu are links for Security, Single Sign-On, and Integration. A green box contains links for Refer-a-Friend, Attend Live Training, Video Tutorials, and Knowledge Base. The main content area has a 'Require meeting password' toggle and a list of options: 'Enable join before host', 'Mute participants upon entry', 'Use Personal Meeting ID 505-143-3856', 'Enable waiting room', and 'Record the meeting automatically on the local computer'. Below these is a dropdown for 'Primary Purpose of Meeting'. The 'Advanced Options' section is expanded, showing 'Schedule For' set to 'Myself' and 'Alternative Hosts' with the example text 'john@company.com, peter@school.edu'. At the bottom are 'Save' and 'Cancel' buttons.

**Step 5:** Click on the dropdown box next to “Schedule For.” If you are assigned as a scheduler for any providers, those names should appear in the dropdown box below “Myself.” Click the provider that you are scheduling for.

The screenshot shows the Zoom meeting scheduling interface. The top navigation bar includes the Zoom logo, 'SOLUTIONS', 'PLANS & PRICING', 'CONTACT SALES', 'SCHEDULE A MEETING', and 'JOIN A MEETING'. The main content area is divided into sections. On the left, there is a green sidebar with links: 'Refer-a-Friend', 'Attend Live Training', 'Video Tutorials', and 'Knowledge Base'. The main content area has a 'Use Personal Meeting ID 825 112 2021' link. Below this are two checkboxes: 'Enable waiting room' and 'Record the meeting automatically on the local computer'. A section titled '\* Primary Purpose of Meeting' has a dropdown menu. The 'Advanced Options (Schedule For, Alternative Hosts)' section is expanded. It contains a 'Schedule For' dropdown menu which is open, showing a search bar and a list of options: 'Myself' (highlighted in blue), 'Corey', and 'Kevin'. Below the dropdown are 'Save' and 'Cancel' buttons.

**Note:** You can also assign an “Alternative Host,” which is a user who will be able to start the Zoom meeting as a host if the assigned provider cannot (or prefers not to) start the meeting himself / herself. For example, if you are a nurse who needs to start the Zoom meeting and interact with a client before the provider joins the meeting, you will want to assign yourself as an alternative host.

Step 6: Click on the blue “Save” button to finish scheduling the meeting.

Once you hit “Save,” the provider will get an e-mail notifying them that a meeting has been scheduled on their behalf. It will look similar to the e-mail below:

**From:** Zoom [mailto:no-reply@zoom.us]  
**Sent:** Thursday, March 21, 2019 2:23 PM  
**To:** Kevin [REDACTED] <[REDACTED]>  
**Subject:** [BULK] New Zoom meeting scheduled - Test



Hi Kevin

Wyoming Telehealth [REDACTED] scheduled a Zoom meeting for you. As a host, you have the ability to start and end the meeting.

Meeting Topic: Test

Meeting Time: Mar 21, 2019 2:30 PM Mountain Time (US and Canada)

### [Join Zoom Meeting](#)

Phone one-tap : US: +166 [REDACTED] or +16 [REDACTED] #

Meeting URL: [https://zoom\[REDACTED\]](https://zoom[REDACTED])

### Join by Telephone

For higher quality, dial a number based on your current location.

Dial:

US: +1 6 [REDACTED]

Meeting ID: 99 [REDACTED]

[International numbers](#)

### Join from an H.323/SIP room system

H.323: [REDACTED] (US West)

[REDACTED] (US East)

[REDACTED] (China)

This folder is