How to Set Up Intake for Telehealth:
Zoom

Phreesia recommends using Zoom for Healthcare for online conferencing because the platform is HIPAA-compliant and built specifically to host telehealth appointments. It also supports dynamic links that are unique to each appointment and/or provider. Here's how to set up Phreesia's Intake for Telehealth workflows with Zoom.

There are two options available for integrating with Zoom:

1. Zoom API

2. Zoom Non-API

Zoom API Set Up Instructions

Step 1 - Purchase a plan.

1. Navigate to **https://zoom.us/pricing**.

2. Choose the Pro, Business or Enterprise plan that best meets the needs of your organization.

   Note: Contact Zoom to learn more about their Telehealth for Healthcare package that is HIPAA-compliant or **click here** for more information.

Step 2 - Required setup.

Phreesia recommends that your organization's Practice Administrator, IT or Network Administrator complete the following steps:

1. Retrieve or generate the Zoom API JWT application credentials (key and secret) and populate the PlatformParameters.key and PlatformParameters.secret. The app name is Phreesia Telehealth App.

   » **Click here** for more information on how to retrieve or generate your JWT credentials.

2. Register your providers using their email address displayed on their Phreesia user account.

   » **Click here** for more information on how to import and update your provider's user accounts.

   » **Click here** to watch a video on how to manage your users.

3. Providers will receive an email notification from Zoom. Ensure that the providers have clicked "Approve" before using Zoom for the first time.

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Step 3 - Recommended settings setup.

Phreesia recommends configuring Zoom to the settings listed below.

Schedule Meeting

Disable "Only authenticated users can join meetings from the Web client"—this allows the patient to join Zoom from a web browser without having to create a Zoom account.

In Meeting Basic

Enable "Require Encryption for 3rd Party Endpoints (H323/SIP)"—this prevents the patient from using unprotected H323/SIP clients to join the Zoom session.

In Meeting Advanced

Enable a "Show a 'Join from your browser" link to allow the patient to use a link and easily join the session.

Email Notification

Enable "When attendees join meeting before host" to send an email notification to the provider alerting them that the patient is waiting in the meeting.

Tip: **Click here** to access instructions to setup and enable your staff to receive Zoom meeting email notifications.

FAQs

What happens if a provider's email does not match in Zoom and Phreesia; and/or has not been verified?

Phreesia will initially create a Zoom API user associated with that provider's email account, schedule a telehealth meeting, delete the original API user profile and add a Basic (Free) Zoom user to the account. Next, Phreesia will send the provider an email invitation to "Approve the Request" to join the practice's zoom account.

Is Zoom compatible with all browsers?

Click here for more information.

How do you revoke permission?

1. Notify Phreesia Support that you will be revoking permissions.

2. Log into Zoom.

3. Click "Deactivate Your App".

4. Click "Regenerate API Secret"—this allows you to keep the app on your platform but will prevent unauthorized users from accessing the API.secret.

   » **Click here** for more information about activation and app credentials.
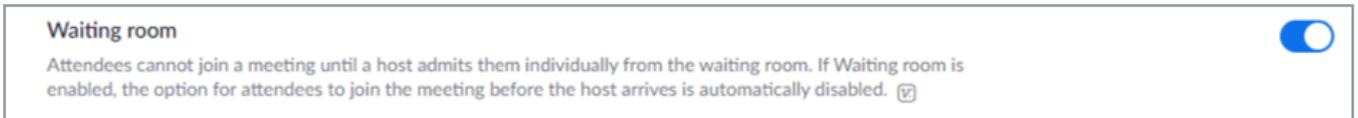
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Zoom Non-API Set Up Instructions

Step 1 - Contact Zoom to purchase a Zoom for Healthcare license(s).

1. Navigate to **https://zoom.us/healthcare**.

2. Scroll to the bottom, and click or dial 1-888-799-9666 to contact their Sales team.
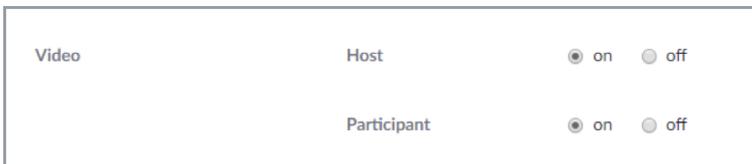
Step 2 - Work with Zoom to implement the Zoom for Healthcare product.

During implementation, Phreesia recommends:

- Create a static meeting link for each provider.
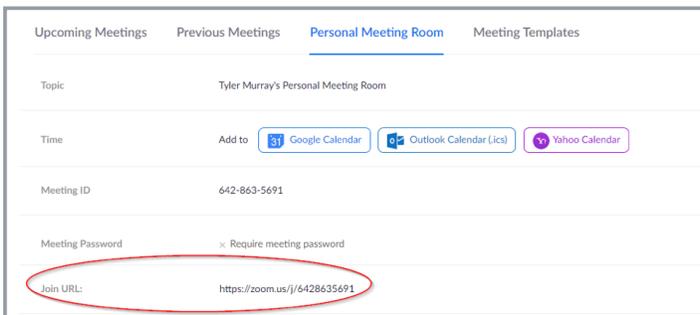- Enable the "Waiting Room" for patients.

- Turn on the Host and Participant video as needed.

Step 3 - Submit a case to Phreesia Support containing:

- Your organization's telehealth appointment types.
- A list of each provider's unique URL (personal meeting room).

FAQs

Does Phreesia have a recommended telehealth administrator vendor?

Phreesia can integrate with most online conferencing vendors. If your organization does not have an online conferencing vendor, Phreesia recommends using Zoom for Healthcare because it is HIPAA-compliant and built specifically for telehealth.

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Where can I go to learn more about how to use Zoom?

Click here to access Zoom's Help Center.

How will patients access their Zoom telehealth visit?

Patients are prompted to enter their telehealth appointment from their virtual intake interview.

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