

Zoom Integration Guide

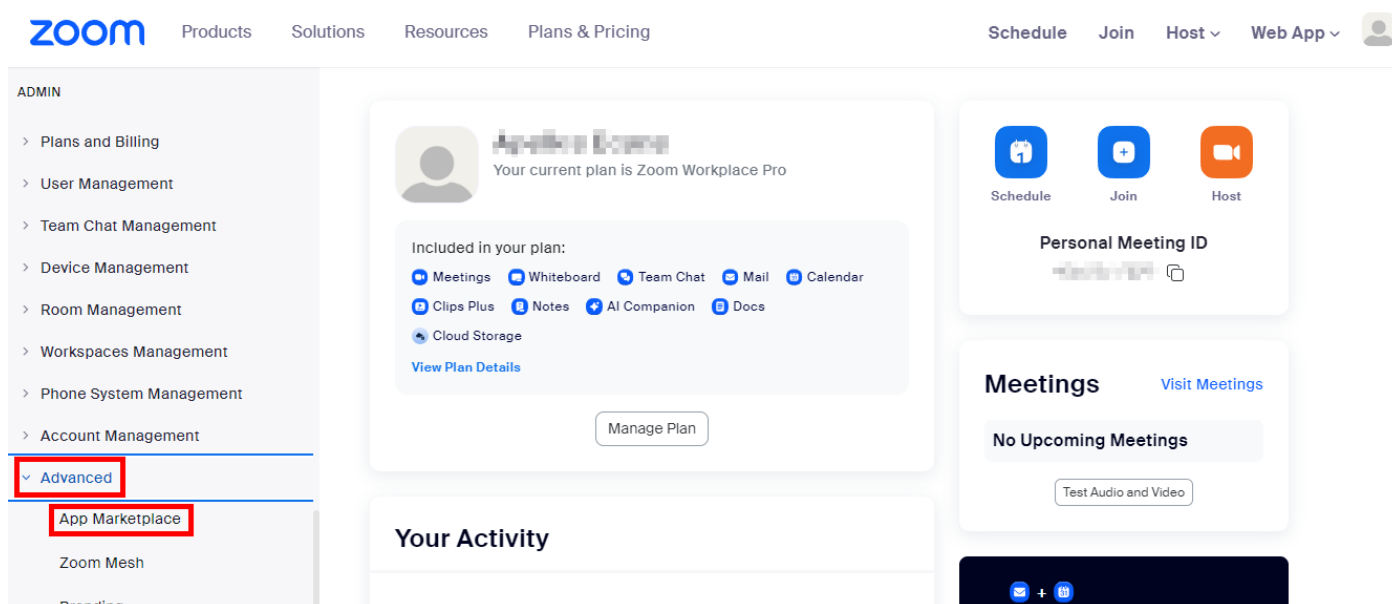
Prerequisites

Zoom integration is offered as a standard feature of ClinicOffice, so there are no additional fees from ourselves, however, Zoom requires you to have a paid-for account for third party applications (like ClinicOffice) to integrate via their API. For more information, please see their price plans here:

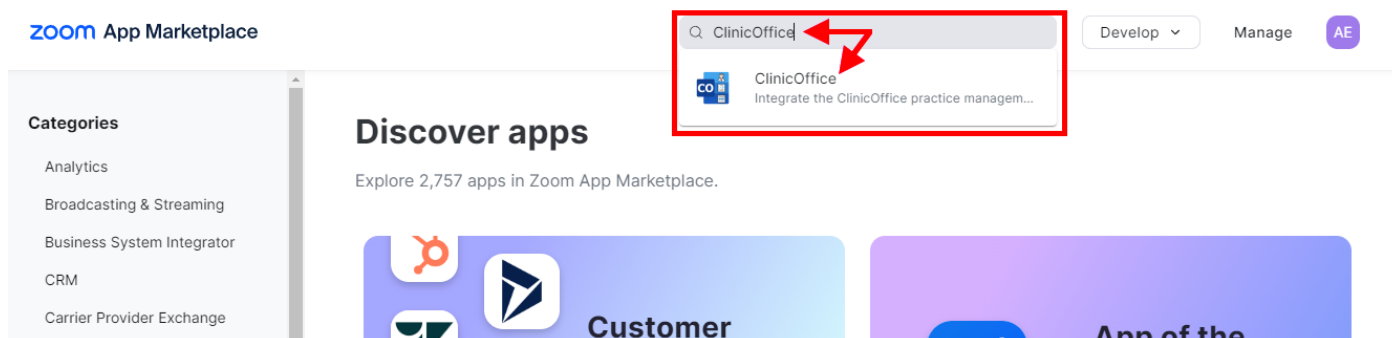
<https://zoom.us/pricing>

Step 1 – Enabling ClinicOffice for Zoom Integration

- 1) The first step is to visit <https://zoom.us/> and login with your Zoom account
- 2) Once logged in scroll down and on the left-hand side click **Advanced** and then click **App Marketplace**



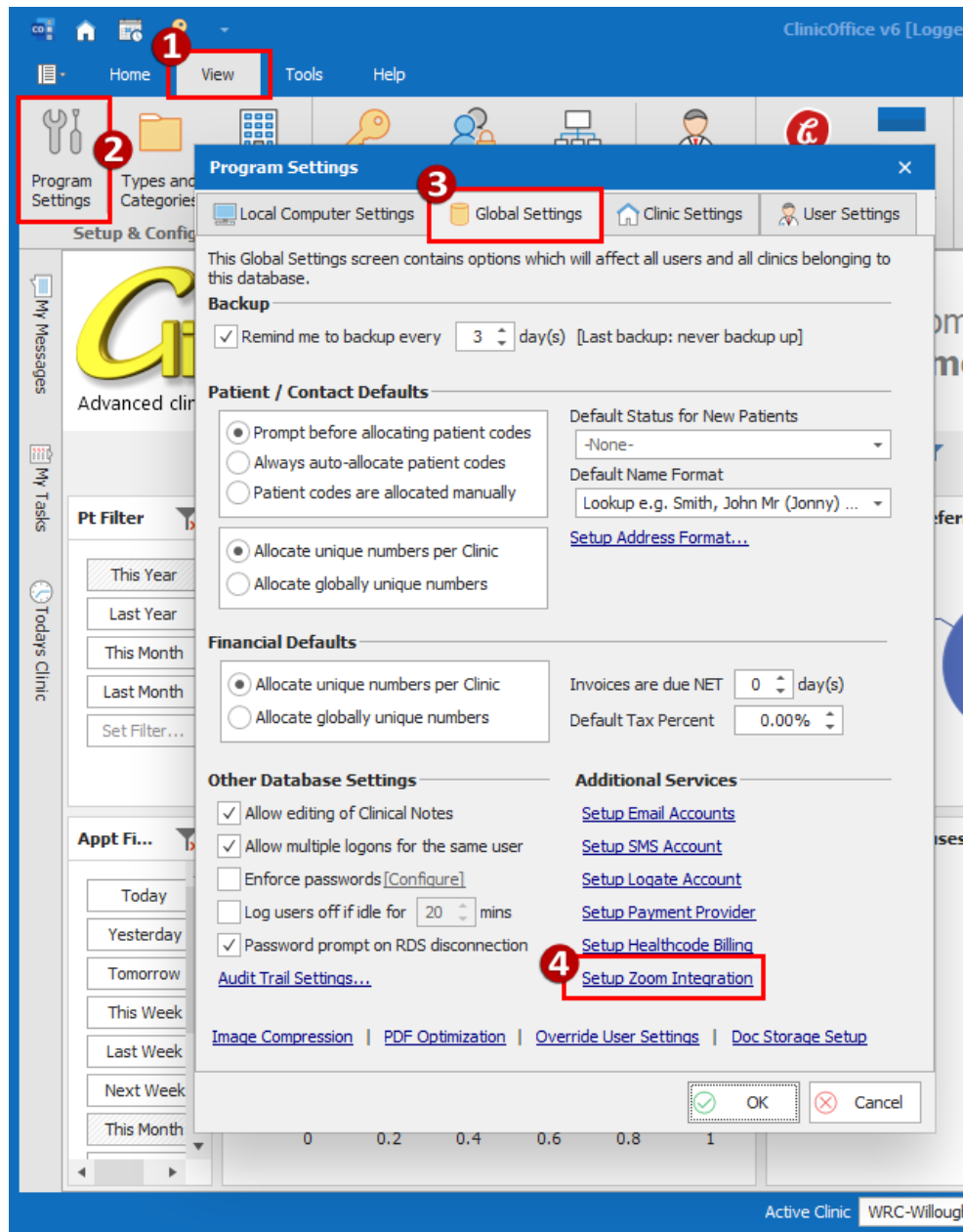
- 3) From the Zoom App Marketplace, click into the search field at the centre top and type “ClinicOffice” (without quotes)
- 4) Select ClinicOffice as the app (as seen below)



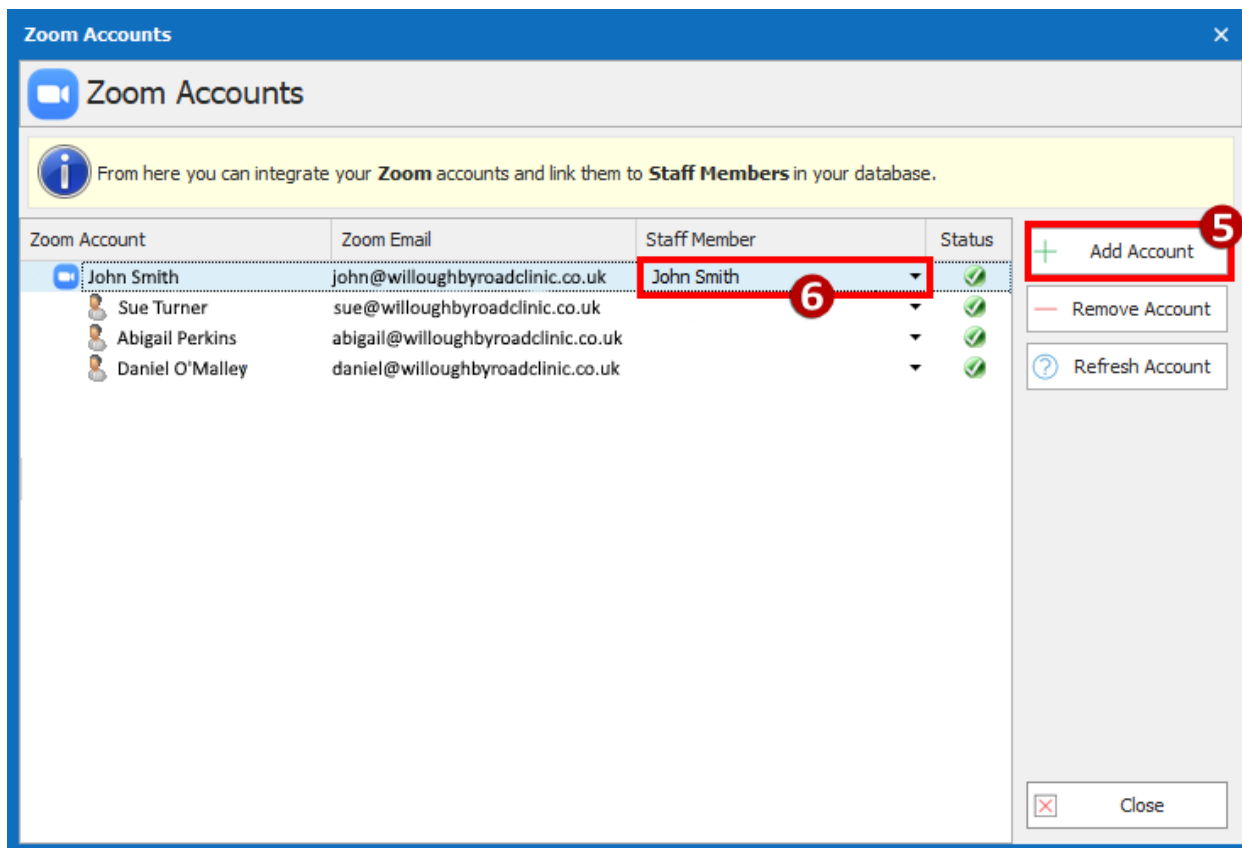
- 5) Click the **Add** button that appears at of the screen
- 6) This will take you to another screen that states “You are about to add ClinicOffice” click the **Allow** button that appears at the bottom of this screen.

Step 2 – Configuring ClinicOffice for Zoom Integration

From ClinicOffice click **[1] View** -> **[2] Program Settings** -> **[3] Global Settings** -> **[4] Setup Zoom Integration** (as shown below).



Click the **Add Account** [5] button and then login to your Zoom account. You will also need to agree to any prompts allowing ClinicOffice to access your Zoom account.



Once your account has been added, map the account to a **Staff Member** in your ClinicOffice database as shown below [6]. If you have any sub-users in your Zoom account, these too can be mapped to Staff Members.

Once you have finished adding your Zoom account(s) to ClinicOffice click the **Close** button.

Step 3 – Creating Zoom Meetings

Now that you have a Staff Member linked to a Zoom account, whenever you create an appointment in the diary for that Staff Member, you will see the option (at the bottom of the screen) of **Create Zoom Meeting**.

The screenshot shows the 'Appointment Details' form with the following sections:

- Appointment Details** and **Pending Charges** tabs.
- Description** field with an **Auto Description** checkbox.
- Dates and Times** section:
 - Start: 18/05/2022 at 09:00
 - End: 18/05/2022 at 09:30
 - Options: This is an 'All Day' appointment, Ignore dashes with other appointments
- Other Information** section:
 - Patient: Allshaw, Stephanie Mrs [1]
 - Acc Balance: Client account: £0.00
 - Practitioner: John Smith
 - Room: -None-
 - Clinic: WRC-Willoughby Road Clinic
 - Appt Type: Treatment
 - Appt Status: -None-
 - Notes: [Empty text area]
- A red box highlights the bottom status bar containing:
 - John Smith has a Zoom account (william.omalley@tutamail.com) [Setup Zoom Accounts]
 - Create Zoom Meeting** button
- Footer information:
 - A patient reminder has not been sent [Reminder options]
 - No invoices have been raised for this appointment [Raise an invoice]

Click **Create Zoom Meeting** to create a new Zoom meeting in your Zoom account and link this appointment to it. This will invoke the screen shown to the right. Set any options you require for the Zoom meeting and click **OK** to create it.

The 'Create Zoom Meeting' dialog box contains the following fields and options:

- Date/Time**: Wed 18/05/2022 (30 mins)
- Topic**: Allshaw, Stephanie Mrs [1]
- Description**: Treatment
- Security & Options** section:
 - Meeting ID: Auto Generate Use Personal Meeting ID (PMI)
 - Password: 523312
 - Enable Waiting Room
 - Participants can join before the host
- Bottom controls:
 - Remember these options
 - OK
 - Cancel

Step 4 – Appointment Reminders for Zoom Meetings

The **Patient Contact Centre** in ClinicOffice allows you to configure rules for sending out Appointment Reminders. (You can find the **Patient Contact Centre** under the main **Patients** button in the ribbon bar.)

When you create an Appointment-based rule there is a setting called “*For Zoom appointments*” (shown below).

This gives you the option to make the rule **ONLY** apply to appointments which are **linked to Zoom** or appointments which are **NOT linked to Zoom**.

Consent Required: -None-

Only run for these users: ...

Only run on this computer: ...

Send a reminder 1 day(s) before the appointment
Send out the reminder if it's overdue : [No]
Bring forward reminders which fall on these days : **Saturday, Sunday**

Only for appointments at the following clinics : [set value]
Only for appointments with the following status : [set value]
Only for appointments of the following types : [set value]
Only for appointments with the following staff : [set value]
Only for appointments in the following rooms : [set value]
Only for appointments with the following flags : [set value]
Exclude appointments with the following flags : [set value]
Only run this rule ONCE for each appointment : [No]
Exclude cancelled appointments from this rule : [No]
Send this reminder even if one has already been sent : [No]

For Zoom appointments : Only send if NOT linked to Zoom

Only for patients with the following status : [set value]

When configuring the reminder itself, there are two Zoom-related merge fields that can be inserted into the message text:

AppZoomURL This embeds the URL (webpage link) for the recipient to tap on to join the meeting

AppZoomPassword This embeds the password (if there is one) that they will require to join the meeting

For more information on creating and configuring Appointment Reminders and other automated rules, please refer to the section “[Patient Contact Centre](#)”.

Appointment Reminder

Text / Email preference: Try SMS before Email

Send an SMS Message

Just a quick reminder about your consult <AppTime>. Please tap this link 5 mins before <AppZoomURL>
Password: <AppZoomPassword>

151 characters (160 is the maximum)

Send an Email

Email Subject:

Insert Templates

- InformalName
- FormalName
- FullName
- AccountBalance
- AppDate
- AppDateLong
- AppTime
- AppStaff
- AppType
- AppRoom
- AppClinic
- AppClinicAddress
- AppZoomURL**
- AppZoomPassword**

Uninstalling/Removing Zoom Integration from ClinicOffice


If you no longer wish to use Zoom with ClinicOffice, simply remove all the accounts from the Zoom Accounts screen, as follows:

- Click **View > Program Settings -> Global Settings -> Setup Zoom Integration**
- For each **Zoom** account, click the **REMOVE ACCOUNT** button

As a second step you can remove the integration from your Zoom account as follows:

- Login to your Zoom Account and navigate to the **Zoom App Marketplace**
- Click **Manage > Added Apps**
- Under the “**Apps in Production**”, click the **Remove** button for the “ClinicOffice” app

The screenshot displays the Zoom App Marketplace interface. On the left, a sidebar menu under 'Personal app management' has 'Added apps' highlighted with a red box. The main content area is titled 'Added Apps' and includes a search bar. Below the search bar, there are two tabs: 'Apps in Production' (selected) and 'Apps in Development'. A table lists the installed apps. The first row shows the 'ClinicOffice' app, which is in production. The 'Remove' button for this app is highlighted with a red box.

Name	App Info	Added by	Shared Access Permissions
 ClinicOffice	Account Level Published	Myself Subscribed Today 04:21 PM	Not Applicable

The above steps will remove all Zoom integration from ClinicOffice.



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