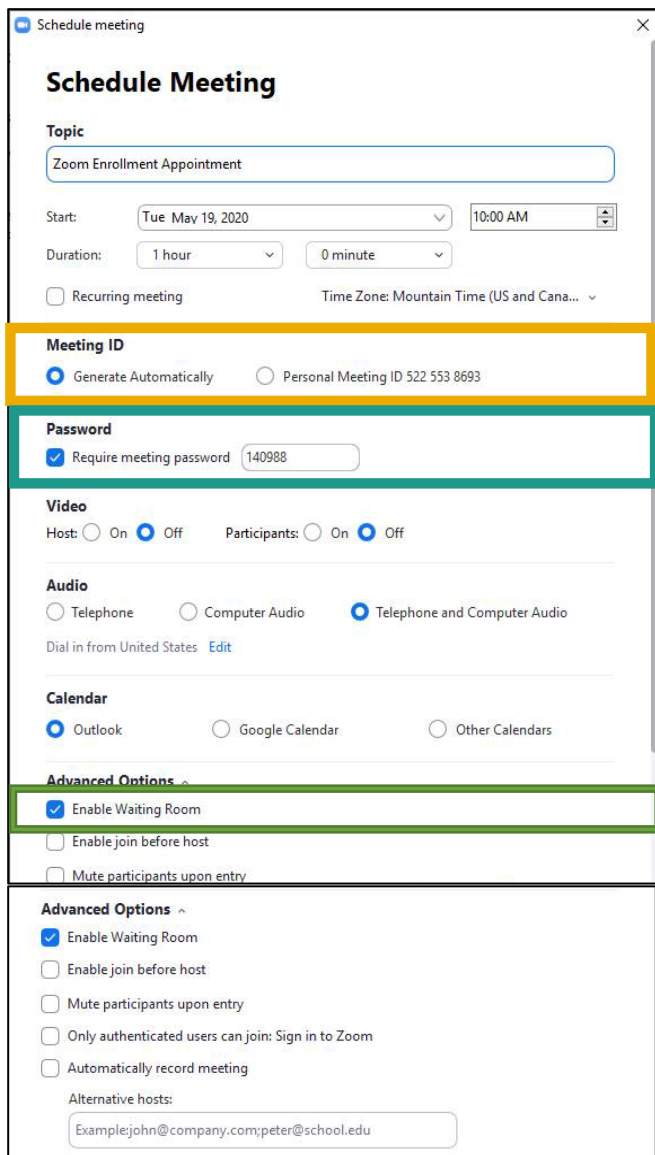


Best Practices for Conducting Enrollment Appointments on Zoom

Due to social distancing requirements, many more assisters are using Zoom or other virtual platforms to conduct enrollment assistance. Below are some tips and best practices to ensure your client's privacy and HIPPA compliance in your Zoom appointments.

- **Do not share a meeting link on an unrestricted, publicly available website** or through social media. Instead, send the link directly to the participants.
- **Make meetings private** either by requiring a password or using the waiting room feature to control admittance of guests into the call. You can enable to waiting room feature as a default setting or for specific meetings. These features can be set by selecting *Require meeting password* or *Enable Meeting Room*.
- **Generate a random meeting ID**, rather than using your personal meeting ID. This can be done by selecting *Generate Automatically* under *Meeting ID* when creating the meeting.

Desktop version



Schedule Meeting

Topic
Zoom Enrollment Appointment

Start: Tue May 19, 2020 10:00 AM

Duration: 1 hour 0 minute

Recurring meeting Time Zone: Mountain Time (US and Cana... ▾

Meeting ID
 Generate Automatically Personal Meeting ID 522 553 8693

Password
 Require meeting password 140988

Video
Host: On Off Participants: On Off

Audio
 Telephone Computer Audio Telephone and Computer Audio

Dial in from United States: [Edit](#)

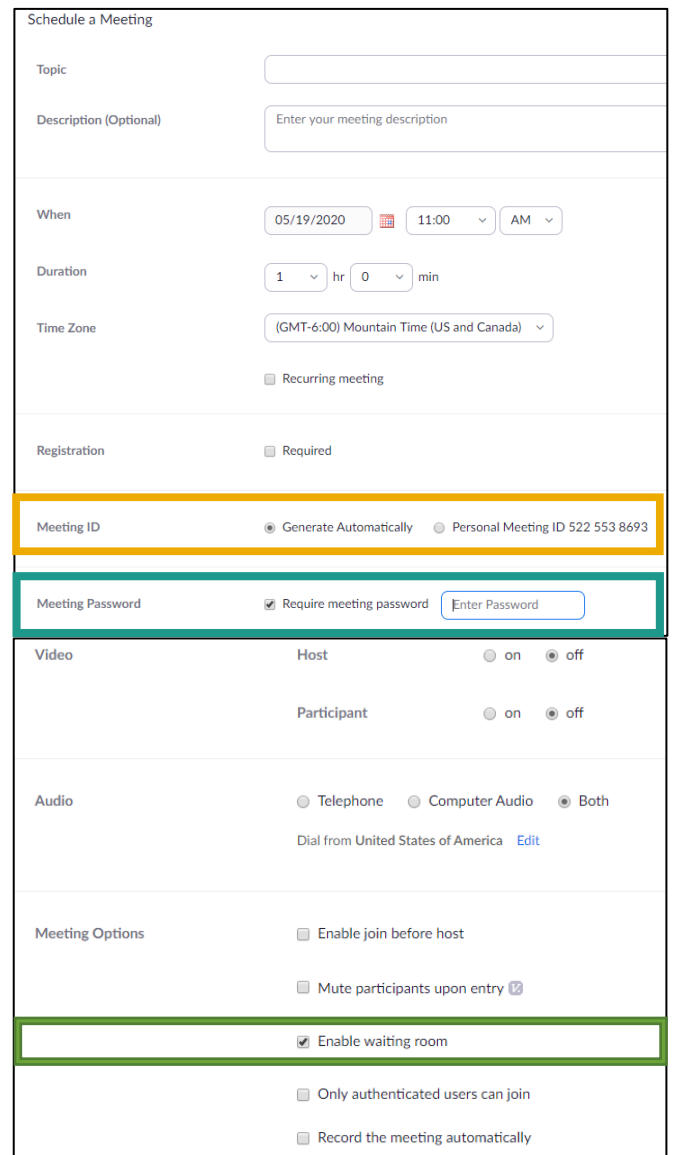
Calendar
 Outlook Google Calendar Other Calendars

Advanced Options
 Enable Waiting Room
 Enable join before host
 Mute participants upon entry

Advanced Options
 Enable Waiting Room
 Enable join before host
 Mute participants upon entry
 Only authenticated users can join: Sign in to Zoom
 Automatically record meeting

Alternative hosts:

Web version



Schedule a Meeting

Topic:

Description (Optional):

When: 05/19/2020 11:00 AM

Duration: 1 hr 0 min

Time Zone: (GMT-6:00) Mountain Time (US and Canada) Recurring meeting

Registration: Required

Meeting ID
 Generate Automatically Personal Meeting ID 522 553 8693

Meeting Password
 Require meeting password

Video
Host: on off
Participant: on off

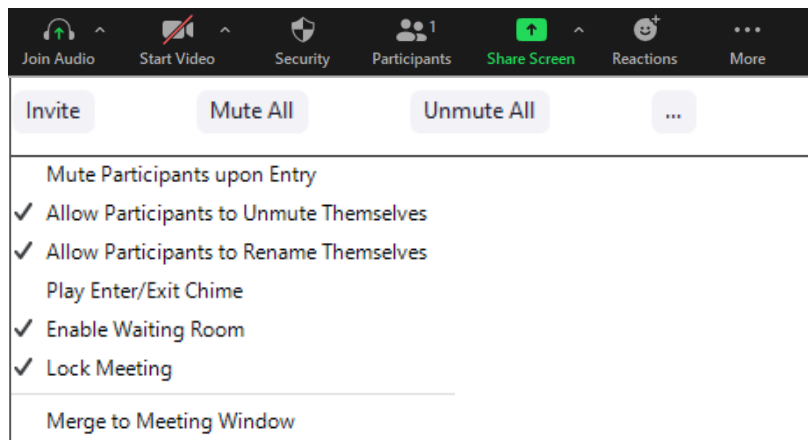
Audio
 Telephone Computer Audio Both
Dial from United States of America: [Edit](#)

Meeting Options
 Enable join before host
 Mute participants upon entry

Enable waiting room

Only authenticated users can join
 Record the meeting automatically

- **Lock your Zoom meeting** after the appointment has started. By locking the meeting, no new participants can join (even if they have the meeting ID and password). To lock a meeting, click *Participants* at the bottom of the screen and click the three dots on the bottom right corner. This will pull up a tab where on feature is *Lock Meeting*. You can still admit people from the waiting room after locking the meeting



- **Remove unwanted participants** by clicking *Remove* next to their name in the *Participants* menu.

Additional information and instructions:

- Zoom, [HIPPA Compliance Guide](#)
- Zoom, [Best Practices for Securing Your Zoom Meetings](#)