

Comprehensive Guide to using Zoom

The purpose of this guide is to help outline how different CODAC Staff members can leverage Zoom in a virtual counseling or patient visitation meeting. It is broken up into three sections so you can access the materials that are relevant to you. If it's your first time using Zoom, reference section 1 for everything you need to get started using Zoom.

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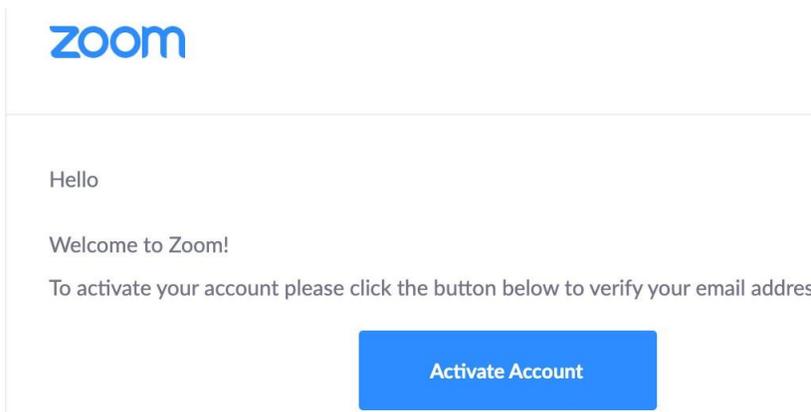
Summary of Roles in Audio-Visual Telehealth

CODAC Role	Responsibility
Director	<ul style="list-style-type: none">• Ensuring patients are enrolled in the Video Telehealth Option as appropriate• May participate in Video Telehealth with patients as appropriate
Clinical Counseling Supervisor	<ul style="list-style-type: none">• Providing clinical supervision• Support staff in the development of video counseling skills• Participate in Video Telehealth with case load
Counselor	<ul style="list-style-type: none">• Offer patients option to receive Video Telehealth and ensure that patient consents are discussed and signed• Participate in development of video counseling skills• Participate in Video Telehealth with case load
Medical Provider	<ul style="list-style-type: none">• Provide Video Telehealth medical services as appropriate.
Health Home Nursing / MA	<ul style="list-style-type: none">• Provide Video Telehealth medical consultation and case management as appropriate.
Front Office	<ul style="list-style-type: none">• Support Video Telehealth scheduling as needed.

Section 1: Getting Started on Zoom

1. How to Sign Up for the First Time

1. You'll receive an email from Zoom to activate. Go to your email and click Activate Account.



2. You'll be redirected to fill in your first name, last name, and create a password.



Welcome to Zoom

Hi, info@diamondmountainoutfitters.com. Your account has been successfully created. Please list your name and create a password to continue.

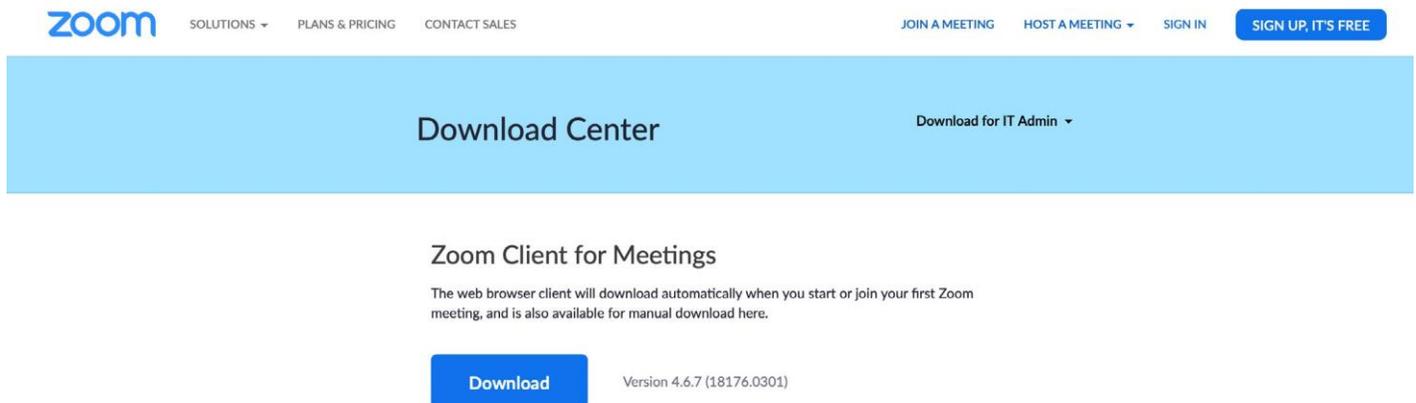
By signing up, I agree to the [Privacy Policy](#) and [Terms of Service](#).

Continue

3. You're good to go!

2. How to Download the Zoom Client (If needed)

- Start by going to <https://zoom.us/download>.
- Click the blue "Download" button under Zoom Client for Meetings to access the installer.



- Open the Zoom installer from your Downloads folder and follow the on-screen steps to set up your Zoom Client.

- If joining via a Chromebook, download the Zoom app through the [Chrome Web Store](#) to join a meeting.

3. How to Schedule a Meeting

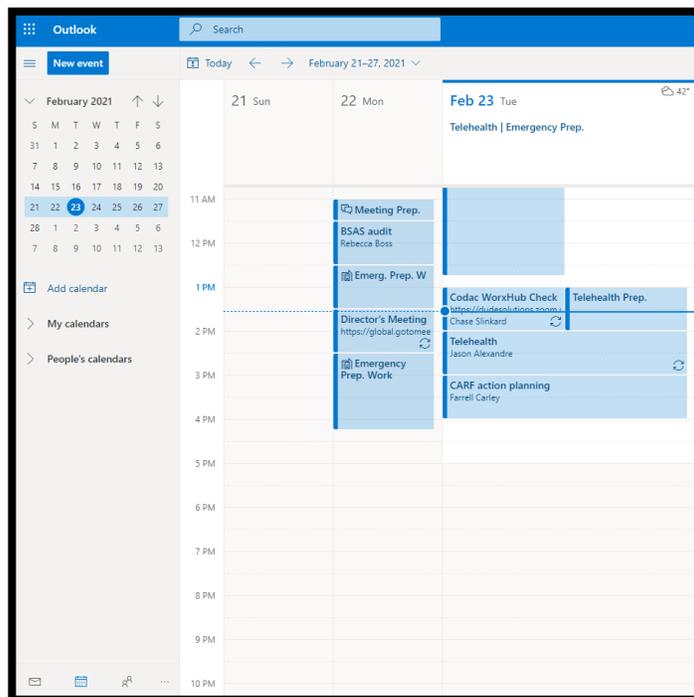
Option 1: Scheduling Zoom through Your Outlook Calendar

The Zoom Scheduler Add-in is designed to make scheduling a Zoom meeting within Microsoft Outlook simple. This add-in allows you to easily add a Zoom meeting to any new or existing calendar event.

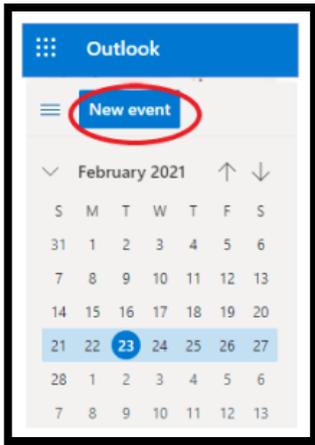
Note: To add Zoom meetings from Outlook mobile application, the Add-in must be installed by the IT admin.

To schedule a Zoom meeting through your Outlook calendar:

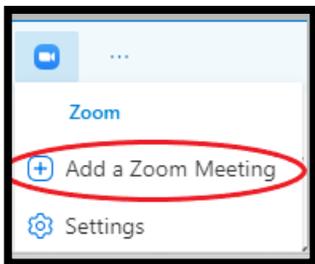
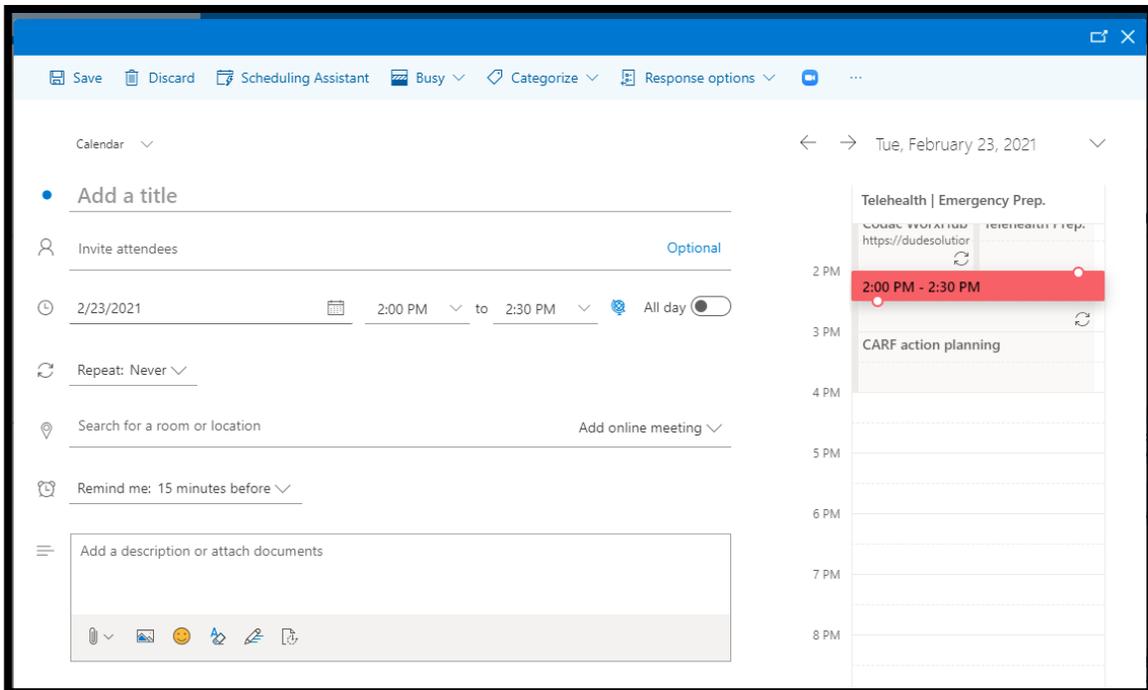
1. Switch from the default email view to the calendar view by clicking on the **calendar icon**  in the bottom left-hand corner of the screen. The calendar view should appear as follows:



2. Click the **'New Event'** icon in the upper left-hand corner. This will launch a new window.



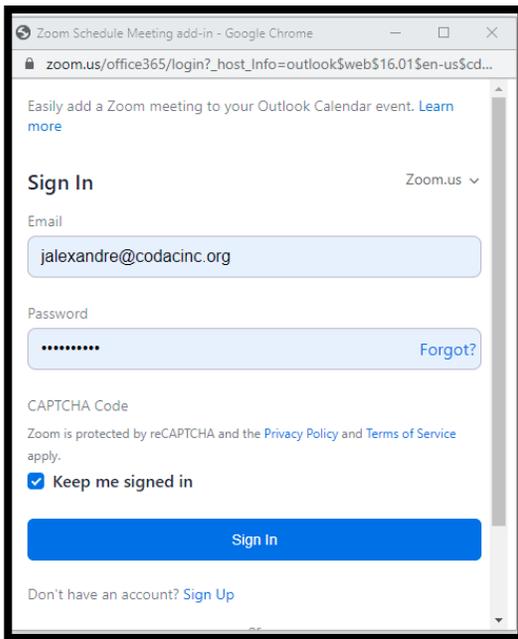
3. Click the **camera icon**  in the top right-hand corner of the ribbon to activate the drop-down menu and then select the 'Add a Zoom Meeting' option.



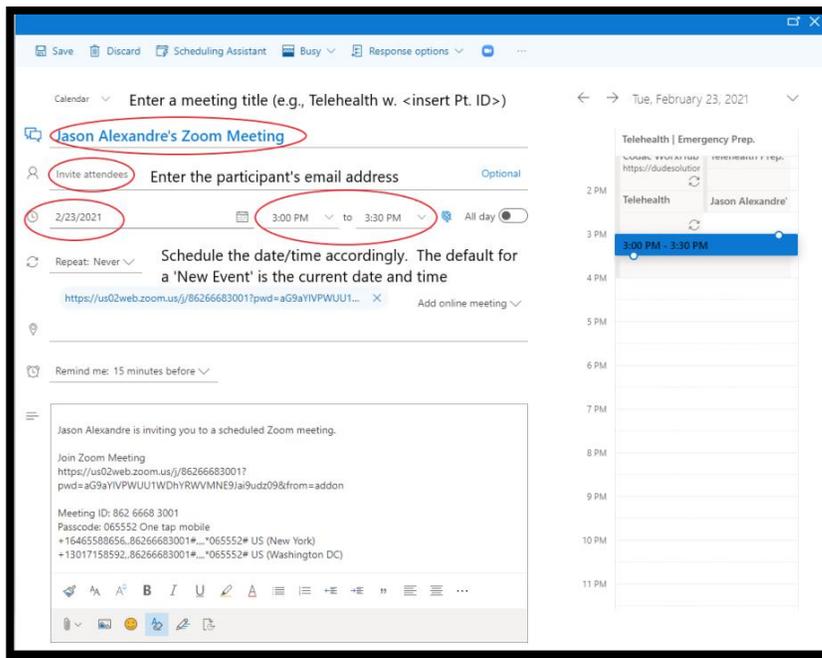
4. A new window will open. Click the '**Allow**' option.

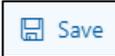


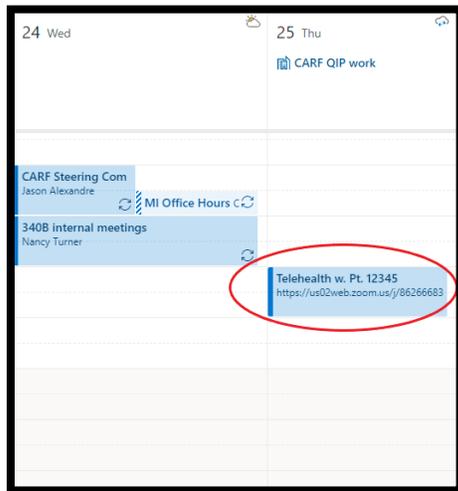
5. A new window will open asking for your Zoom **login-in credentials**. Enter your email address and password. Click the **'Keep me signed in'** box if you would prefer to not have to log-in each time you create a Zoom meeting. Select 'Sign In' and complete the CAPTCHA Code challenge.



6. Your calendar window will be populated with a Zoom invitation. **Update the meeting name, date, time and Invite attendees fields, as appropriate.**

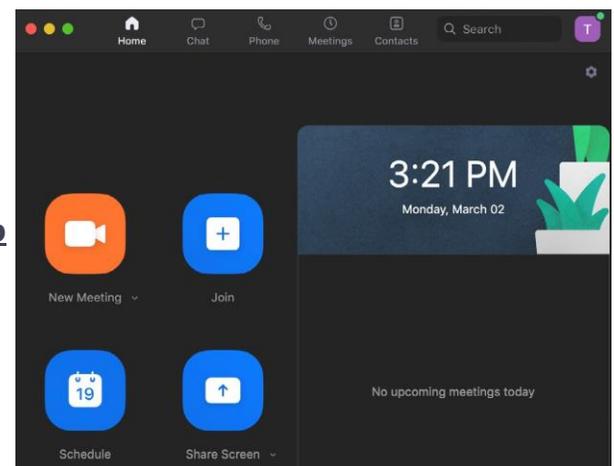


7. Once complete, click the **'Save'** icon  in the top left-hand corner of the ribbon. This will populate your calendar with the event and send an invitation to the participant.



Option 2: Scheduling through the desktop app

1. Open the Zoom desktop app.
2. Click on the Home button at the top left.
3. Press the Schedule button.
4. Enter in Topic, Date, and other related details and press Schedule. It is recommended that you make Registration required when scheduling a meeting, as that allows you to generate a



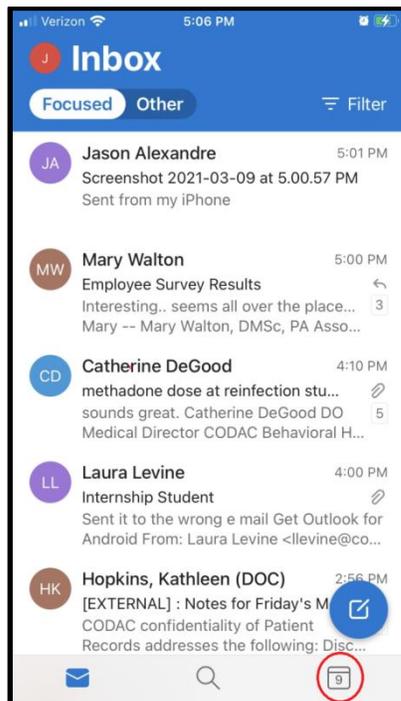
registration report after the meeting is over. More information can be found here:

<https://support.zoom.us/hc/en-us/articles/216378603>

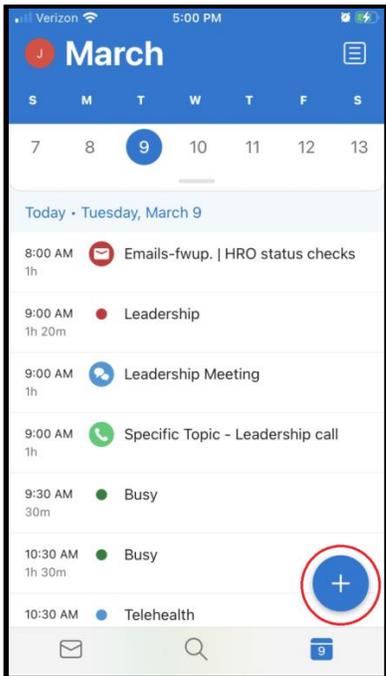
The screenshot shows the Zoom meeting scheduling interface. It includes fields for Topic (Mrs. Smith's 5th Period History Class), Date (3/20/2020, 1:30 PM to 2:15 PM), Meeting ID (Generate Automatically selected), Password (Require meeting password unchecked), Video (Host and Participants both On), Audio (Telephone and Computer Audio selected), Calendar (Google Calendar selected), and Advanced Options (Enable Waiting Room, Enable join before host, and Mute participants on entry all checked). Buttons for Cancel and Schedule are at the bottom.

Option 3: Sending a Zoom Invitation via Outlook Mobile App Calendar invitation

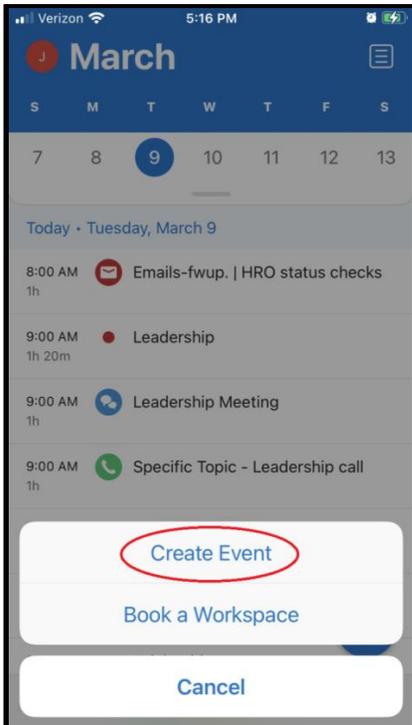
- Click on the calendar icon  to switch from the default email view to the calendar view

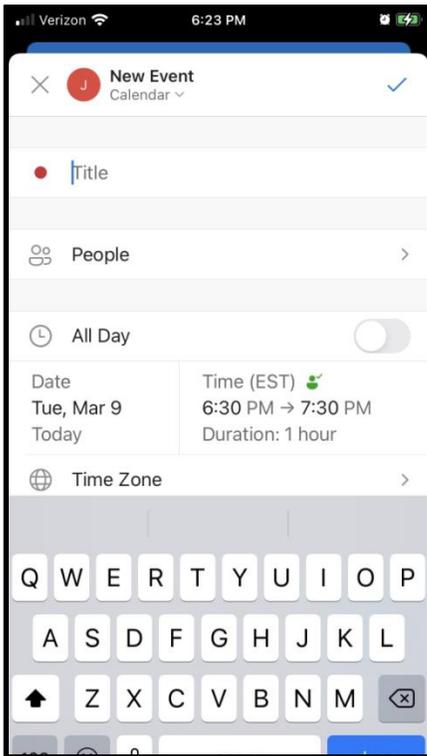


- Click on the 'Add New Event' icon 

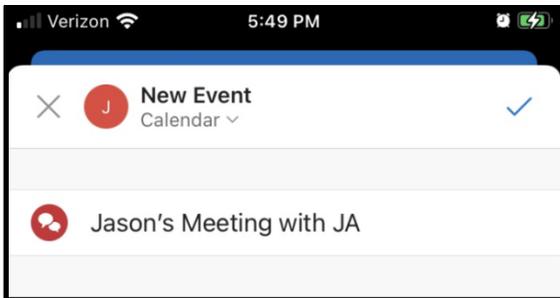


- Select 'Create New Event'





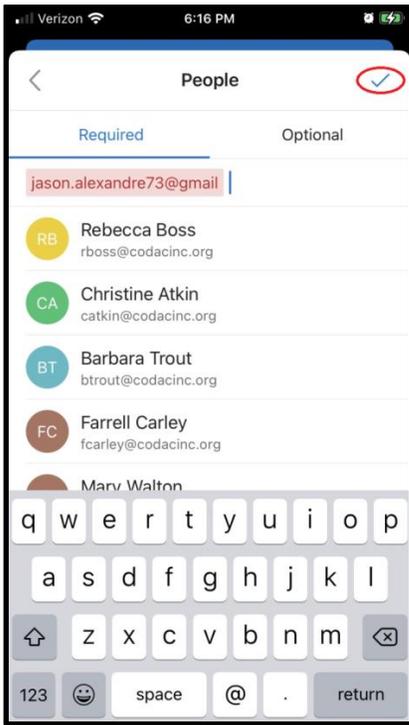
- **Title the event** in a manner that makes it discrete for the patient, but meaningful to the service provider. In the example below I have included my first name and the initials of the patient in the 'Title' section



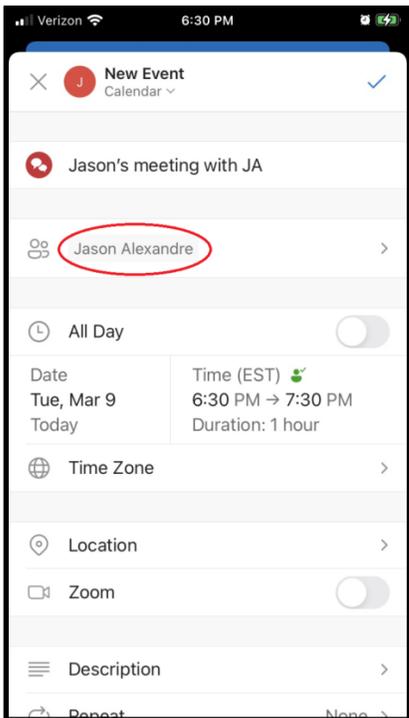
- Next, include the event participant in the 'People' field, if sending the link via email:



- By clicking the > icon, you will be taken to a field where you can enter the patient's email address. Once the address had been entered, click on the checkmark icon to confirm your selection.



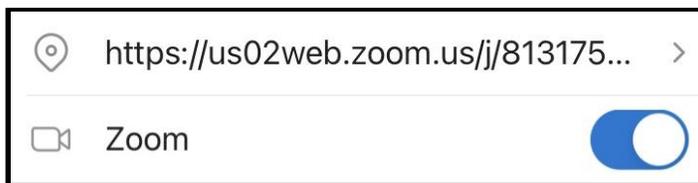
- The patient's name or email address will appear in the 'People' section.



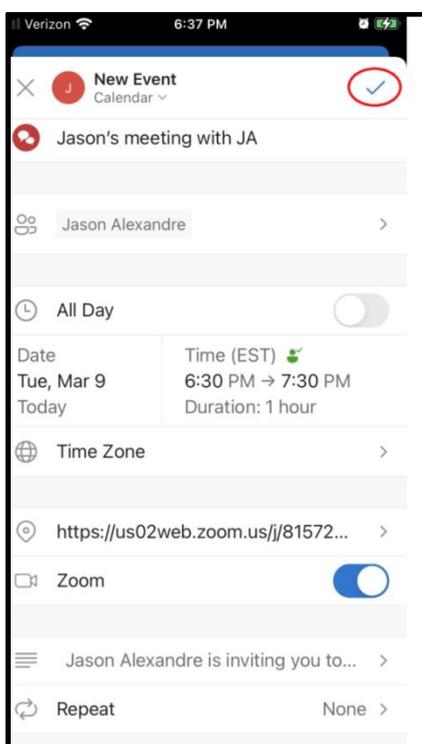
- To schedule a Zoom meeting, press the toggle.



- The button will become blue and a link will be generated in the location field.



- To save the event to your Outlook calendar and send an email invitation to the recipient, simply touch the blue checkmark icon ✓ in the top, right-hand corner. The recipient can choose to save the event to their calendar and/or keep the email in their inbox with the Zoom link.



Option 4: Scheduling Online

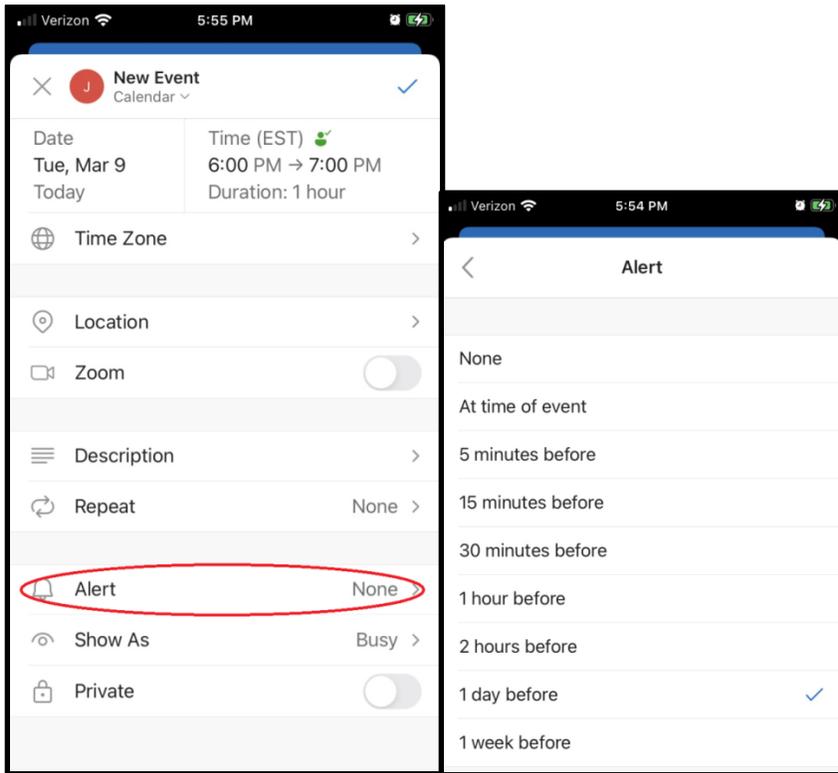
1. Go to <https://zoom.us/meeting> (You may be prompted to sign in but will be redirected to the page after)
2. Click the blue "Schedule a New Meeting" button in the top left corner
3. Enter in Topic, Date, and other related details and press Schedule. It is recommended that you make Registration required when scheduling a meeting, as that allows you to generate a registration report after the meeting is over. More information can be found here: <https://support.zoom.us/hc/en-us/articles/216378603>

The screenshot displays the Zoom web interface for scheduling a meeting. The top navigation bar includes the Zoom logo, links for SOLUTIONS, PLANS & PRICING, and CONTACT SALES, and buttons for SCHEDULE A MEETING, JOIN A MEETING, HOST A MEETING, and SIGN OUT. The left sidebar lists PERSONAL options: Profile, Meetings (highlighted), Webinars, Personal Audio Conference, Phone, Recordings, and Settings, along with an ADMIN section. The main content area is titled 'My Meetings > Schedule a Meeting' and contains the following fields:

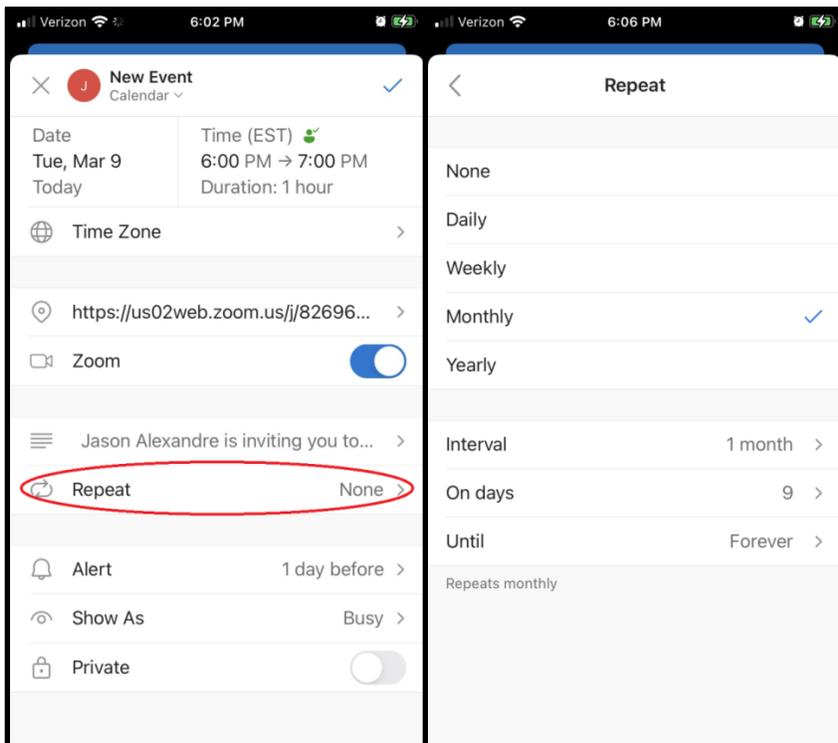
- Topic:** Mrs. Smith's 5th Period History Class
- Description (Optional):** Enter your meeting description
- When:** 03/20/2020, 1:30 PM
- Duration:** 0 hr 45 min

4. Additional Features

- **If your patient would like to receive telehealth appoints via email and they use the calendar function on their smart phone,** additional functions can be utilized such as appointment reminder alerts. By using this function, you can set a reminder for your patient at a designated interval.

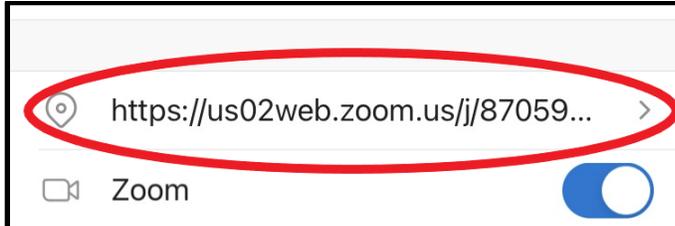


- For patients who would like a recurring appointment, you can select a desired interval for the appointment to repeat, including an expiration date. In the example below, no expiration date has been set, so the appointment will continue to fall on the 9th of each month indefinitely.

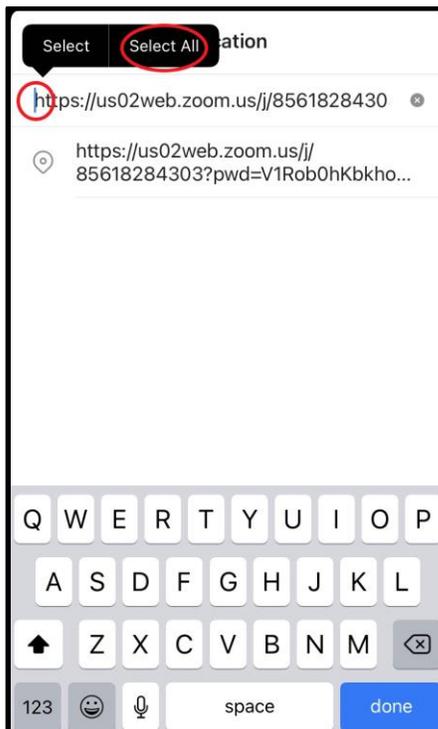


Option 1: Sending a Zoom Link via SMS Text

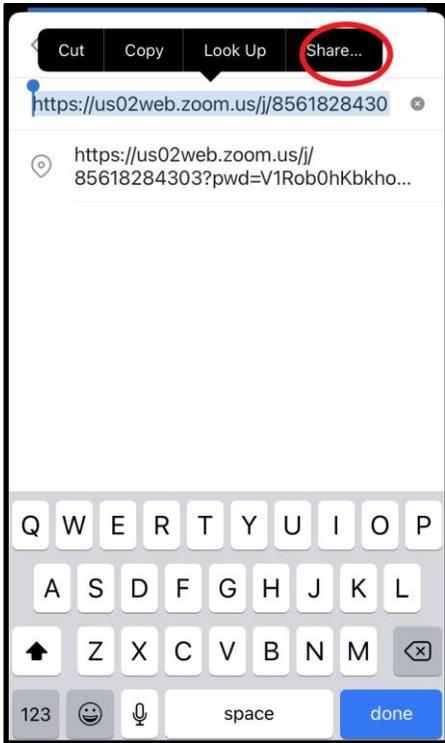
- Should the patient prefer to be notified via SMS Text Message, it will still be necessary to set-up the appointment through the Outlook Mobile App, as described above; however, instead of entering an email address for the recipient, the Zoom meeting link will need to be copied after it has been created.
- To do this, press the Zoom link in the calendar invitation:



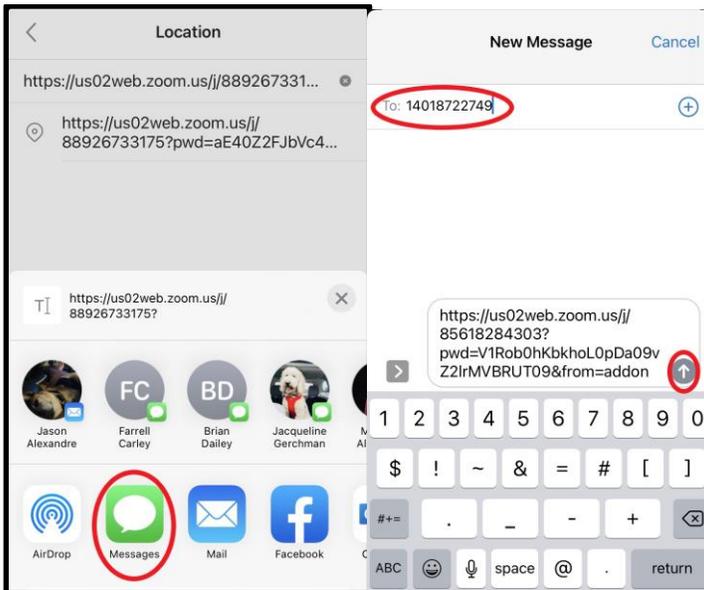
- A new window will open. Place your finger on the blinking blue pipe | icon.
- You will need to drag the icon all the way to the left until you reach the start of the URL (begins with https://) in order to capture the entire link.
- Once the blue pipe | icon is at the beginning of the URL, tap in the area of the pipe | icon once. This will bring up the 'Select All' option. Touch the 'Select All' option to highlight the entire link.



- Tap the highlighted link to open a new menu and touch the 'Share' option.

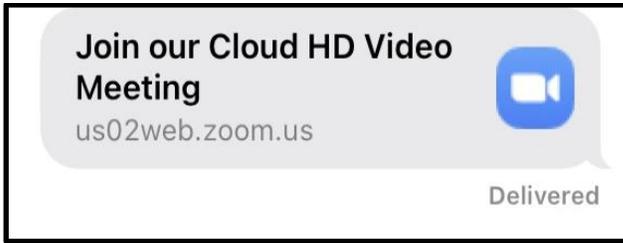


- This will activate options for sharing the link. Touch the Messages option. Enter the desired contact number (carefully check and confirm it is the correct telephone number for the correct patient) and press send.

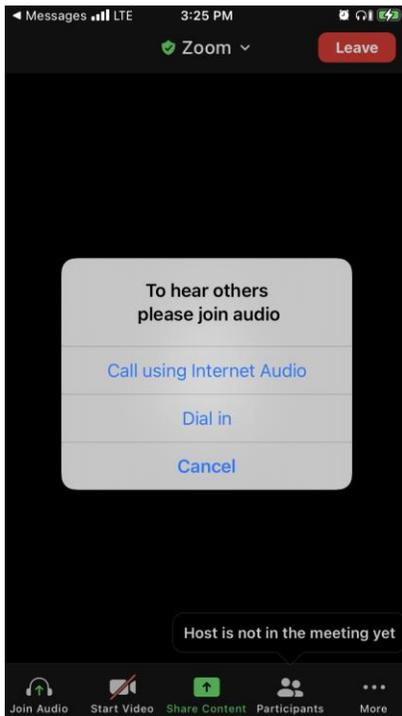


- **Note:** Never store patient names as contacts in your phone.
- The link will now be embedded in a text message. You may now forward the meeting link as you

would any text message. The text message should resemble as follows:



- **Tip:** Because no descriptive information is included with the text message, it is suggested that a brief text message be sent, following the links (e.g. Meeting with [insert staff person's initials] on [insert date and time]).
- By clicking on the link, the patient will be directed to the Zoom meeting.



5. **How to join a Class/Meeting**

Option 1: Join via meeting URL

- Open the email, newsletter, calendar invite, or other communication that contains a link to the pre-scheduled meeting.

Join a meeting using one of these methods:

Option 2: Join via Email/ Text Message Link

- When a host sends you an invitation, you'll receive that invitation via email or text message.

The first link in the message is the "Join Zoom Meeting" link. Click that link.

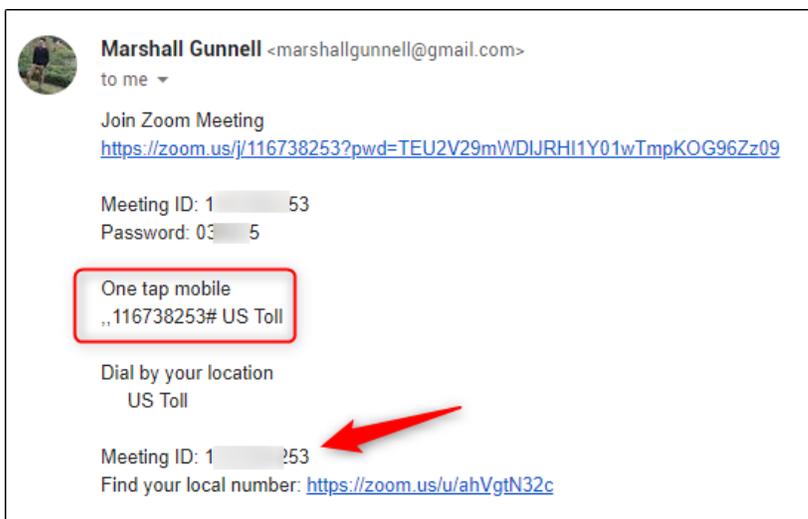


- Once selected, you'll be brought to the Zoom meeting.

Option 3: Call in to the Meeting (Phone)

- If you'd rather just use your phone to call the meeting, that's an option too.

In the email/ text message invitation you received, you'll see the teleconferencing number.



- Call that number. When prompted, enter the meeting ID number using your dial pad.

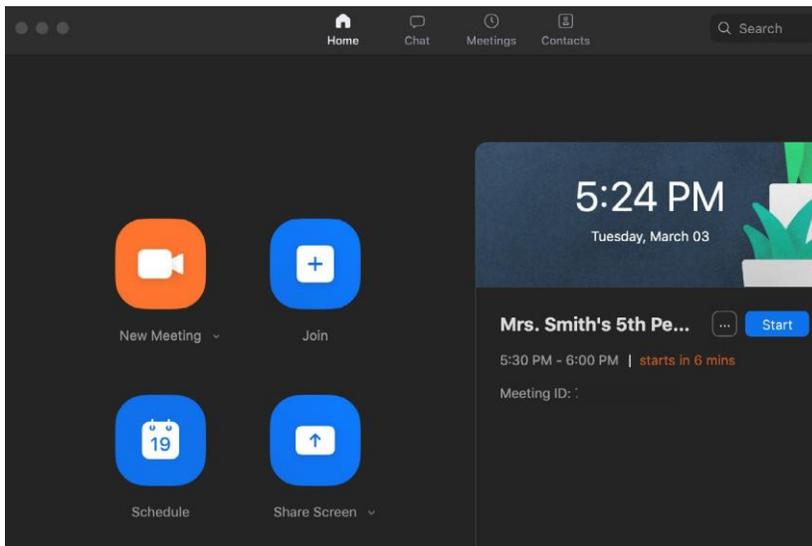
- You will be asked to enter your password.

Enter the meeting password followed by the # sign and you will be joined onto the call.

Option 4: Join through desktop client using the Meeting ID.

- Open the Zoom desktop app.
- Click on the Home Button.

- Click Join and type in the provided Meeting ID and your name.



Option 5: Join using the Web client/browser.

- By default, users will now need to sign in to their Zoom account or create a Zoom account when joining a meeting with the Web client. This can be disabled by the Admin or the User from their settings page.
- Once you're in the meeting, you may choose to connect audio in three different ways:
 - Using computer audio (recommended).
 - Dialing into a conference bridge from your phone (paid account).
 - Have Zoom call you by entering your phone number and your meeting will call your phone (paid account).

6. Best Practices while in a Class/Meeting

- Sign in to the Zoom desktop client and stay signed in.
- Check your internet speed.
- Turn your camera on and have you camera at eye level.
- Make sure you sit in a well-lit and quiet place.
- Be mindful of what's going on behind you. Think about having solid wall behind you or turning on the virtual background.
- Wear a shirt or blouse that contrasts the color of the walls of the room

Section 2: Common Zoom Controls

1. Commonly Used Controls in Zoom

- **Security Icon in Toolbar**

- Visible only to hosts and co-hosts of Zoom Meetings, the Security button provides easy access to several existing Zoom security features, as well as a new option to turn on the Waiting Room in-meeting. This button allows you to remove participants, lock your meeting, and decide if you want to allow your participants to screen share, chat, rename themselves, and annotate on shared content.

- **Managing Participants**

- As the host of a class/meeting, you can manage participants such as renaming, muting, stopping video and other controls for participants. For more, visit: <https://support.zoom.us/hc/en-us/articles/115005759423-Managing-participants-in-a-meeting>

- **Video ON/OFF**

- Once in a meeting, you can turn your video on by clicking the "Start Video" icon on the bottom left of your screen. To turn it off, click the "Stop Video" icon. For more, visit: <https://support.zoom.us/hc/en-us/articles/200941109-Attendee-Controls-in-a-Meeting>

- **Virtual background**

- Once in the meeting, you can select a virtual background by clicking the up caret to the right of the Start Video icon. For more, visit: <https://support.zoom.us/hc/en-us/articles/210707503-Virtual-Background>

- **Muting**

- To ensure minimal background noise during your Zoom meeting, it is recommended that you mute everyone on the call when they're not talking. To do this, click on the Participants icon at the bottom of your screen click Mute All in the side panel. For more, visit: <https://support.zoom.us/hc/en-us/articles/203435537-Mute-All-And-Unmute-All>

- **Chat in a meeting**

- Meeting participants can ask questions during a Zoom Meeting via the meeting chat. Start by clicking the "Chat" icon on the bottom right of your screen.
- Once the chat panel will open up on the right, you can view and respond to all public chats.
- Use the three dots to choose whether you want to send messages to all meeting attendees or the host privately.
- *Note: Private chats will not be visible to the host. To control and disable in-meeting chat, visit: <https://support.zoom.us/hc/en-us/articles/115004809306-Controlling-and-Disabling-In->

Meeting-Chat

- **Sharing Screen**
 - Click the “Share Screen” icon at the bottom of your screen to share your desktop.
 - If you’d like to share specific windows or applications, you can choose to do so from the dialog box.
 - For more, visit: <https://support.zoom.us/hc/en-us/articles/201362153-How-Do-I-Share-My-Screen->

Section 3: Resources

- Polling: <https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-Meetings>
- Breakout Rooms: <https://support.zoom.us/hc/en-us/articles/206476093-Getting-Started-with-Breakout-Rooms>
- Non-verbal Feedback: <https://support.zoom.us/hc/en-us/articles/115001286183-Nonverbal-Feedback-During-Meetings>
- Virtual Backgrounds: <https://support.zoom.us/hc/en-us/articles/210707503-Virtual-Background>
- Sharing a Screen: <https://support.zoom.us/hc/en-us/articles/201362153-How-Do-I-Share-My-Screen->
- Whiteboard: <https://support.zoom.us/hc/en-us/articles/205677665-Sharing-a-whiteboard>
- Annotation: <https://support.zoom.us/hc/en-us/articles/115005706806-Using-annotation-tools-on-a-shared-screen-or-whiteboard>
- Transcription of meetings: <https://support.zoom.us/hc/en-us/articles/115004794983-Automatically-Transcribe-Cloud-Recordings->
- Chat: <https://support.zoom.us/hc/en-us/articles/203650445-In-Meeting-Chat>
- Generating Meeting Reports for Registration and Polling: <https://support.zoom.us/hc/en-us/articles/216378603-Generating-Meeting-Reports-for-Registration-and-Polling>
- Recording: <https://support.zoom.us/hc/en-us/articles/206277393-Finding-and-Viewing-Recordings>