



ZOOM TRAINING

For All

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How to Join a Meeting

A. Clients, Patients, Volunteers, Staff, General Public

1. Download Zoom
 - a. <https://zoom.us/support/download>
 - b. Setting Up Zoom – walk-through
2. Getting Started on Windows and Mac
 - a. <https://support.zoom.us/hc/en-us/articles/201362033-Getting-Started-on-Windows-and-Mac>
3. Getting Started on iOS (Apple)
 - a. <https://support.zoom.us/hc/en-us/articles/201362993-Getting-Started-with-iOS>
 - b. Download app from App Store or zoom.us website.
 - c. If question pops up about allowing permission, select “Settings”, toggle the button on, the click “Done” or “Back” to go back to the previous screen.
 - d. Click Install.
 - e. Once installed, click link again to access meeting.
4. Getting Started on Android
 - a. <https://support.zoom.us/hc/en-us/articles/200942759-Getting-Started-with-Android>
 - b. Download app from Google Play store or zoom.us website
 - c. If question pops up about allowing permission, select “Settings”, toggle the button on, the click “Done” or “Back” to go back to the previous screen.
 - d. Click Install.
 - e. Once installed, click link again to access meeting.
5. Joining a meeting – Video and walk-through of the various platforms
 - a. <https://support.zoom.us/hc/en-us/articles/201362193-How-Do-I-Join-A-Meeting->
6. Troubleshooting Zoom access
 - a. Questionnaire – See Appendix A
 - b. Tablets, phones, laptops – have power source handy as Zoom can take up a lot of battery resources
 - c. Security – Zoom is encrypted. Data within a call cannot be intercepted.



How to Host a Meeting

A. Meetings longer than 40 minutes

1. Login to your departmental Zoom account
 - a. Get user name and password from your supervisor
 - b. Sign in
2. Scheduling a meeting – from desktop or mobile app, web portal
 - a. <https://support.zoom.us/hc/en-us/articles/201362413-Scheduling-meetings>
 - b. You will not likely be scheduling by plugin for Outlook but there are directions if you need to
 - c. Recommendations:
 - i. Video – on for both Host and Participants, they can always choose to turn it off
 - ii. Do not require meeting password for public events – it’s another layer of complexity
 - iii. Enable join before host – only if you want others to get into the meeting before you do
 - iv. Mute participants on entry – a number of people joining at once can cause a lot of noise
 - v. Record meeting automatically – only if this will not include any PHI or HIPPA protected information. You can always start a recording during the meeting if you need to.
 - vi. Alternative hosts – not an option (this is where “join before host” is helpful as you could designate another team member to be the host if you are not available)
 - d. Once scheduled, you will see a blue button in the top right corner “Start Meeting.” Click this at meeting time. Recommend the host to arrive 5 minutes early.
 - e. There will be a link to the meeting and “copy invitation” button. Use this information to share the meeting by email or social post (if public) so people can access your meeting.
 - f. The “Meeting ID” is the key information. There will also be phone numbers if they need to call in instead of using computer audio (see Appendix A for troubleshooting.)
3. Instant meeting
 - a. If you need to host an instant Zoom meeting that starts “now”, go to zoom.us
 - b. Click “Host a Meeting” in upper right corner.
 - c. Select “With Video On,” “With Video Off,” “Screen Share Only”
 - d. Meeting will start right away and the link to share will be copied to your clipboard so you can quickly share it by email, messenger, etc.
 - e. Once the meeting is over, the unique Meeting ID is deleted. You still have all capabilities.



B. Meetings Shorter than 40 minutes

1. Log into your personal Zoom account, the free one.
2. Schedule meeting as above.
 - a. Meeting will be limited to 40 minutes if it has more than 2 people attending
 - b. Meeting will automatically end, with no warning, at 40 minutes
 - c. There is a maximum of 100 attendees allowed
 - d. With the increased traffic on Zoom, you may not be able to use the dial-in phone conferencing capabilities. It is recommended that all use computer audio.
 - e. See Appendix A for troubleshooting Zoom access.

Appendix A – Let’s Check Your Tech



1. Have you used Zoom before?
 - a. If no, skip to step 2.
 - b. If yes, click the link provided to join event.
 - c. Test your audio and video capabilities.
 - i. If you have a webcam/microphone set up, just make sure it works by clicking “Test Audio” on the pop-up.
 - ii. If you have only video, call the phone number to join the audio.
 - iii. If you prefer, plug in ear buds with a microphone (used with your phone.)
 - iv. If you have neither video nor microphone, call the phone number to join the audio.



2. Do you have a computer?
 - a. If no, skip to step 3.
 - b. If yes, click the link provided to join event.
 - c. Test your audio and video capabilities.
 - i. If you have a webcam/microphone set up, just make sure it works by clicking “Test Audio” on the pop-up.
 - ii. If you have only video, call the phone number to join the audio.
 - iii. If you prefer, plug in ear buds with a microphone (used with your phone.)
 - iv. If you have neither video nor microphone, call the phone number to join the audio.



3. Do you have a tablet (iPad, Samsung, etc.)
 - a. If no, skip to step 4.
 - b. If yes, click the link provided to join event. (Your camera and microphone are part of the tablet.)
 - c. Test your audio and video capabilities.
 - i. If you have a webcam/microphone set up, just make sure it works by clicking “Test Audio” on the pop-up.
 - ii. If you have only video, call the phone number to join the audio.
 - iii. If you prefer, plug in ear buds with a microphone (used with your phone.)
 - iv. If you have neither video nor microphone, call the phone number to join the audio.



4. Do you have a smart cell phone (iPhone, Android, Pixel, etc.)
 - a. If no, skip to step 5.
 - b. If yes, click the link provided to join event. (Your camera and microphone are part of the tablet.)
 - c. Test your audio and video capabilities.
 - i. If you have a webcam/microphone set up, just make sure it works by clicking “Test Audio” on the pop-up.
 - ii. If you have only video, call the phone number to join the audio.
 - iii. If you prefer, plug in ear buds with a microphone (used with your phone.)
 - iv. If you have neither video nor microphone, call the phone number list in the event information to join the audio.



5. Do you have a land line phone?
 - a. There will be a phone number provided in the event information.
 - b. Call the number to listen to the event over the phone.
6. Call us at 530-758-5566 if you have questions or are having trouble connecting to the event you wish to participate in. Our goal is to help you stay connected, so please reach out.