

Zoom Instructions for Hosts – Before the Meeting

1. These are some of the must-have **security settings** (in my opinion) under the “**Meeting**” tab in the web version of Zoom at zoom.us. I suggest you enable and disable these features for a more secure meeting:
 - a. disable “**Host video**” – you can decide when you want to turn your video on
 - b. disable “**Participant video**” – you can ask participant to turn video on when meeting begins
 - c. disable “**Join before host**”
 - d. disable “**Use Personal Meeting ID**”
 - e. enable “**Only authenticated users can join meetings**” (participants must sign up for a Zoom account and sign in to join the meeting)
 - f. disable “**Embed password in meeting for one-click join**” (enable this feature if you want your participants to be able to join the meeting with one-click without having to manually enter the password – good for client meetings or meetings with professionals or others you know and trust)
 - g. enable “**Require password**” – several settings in this section for you to enable
 - h. enable “**Mute participants upon entry**”
 - i. enable “**Require Encryption for 3rd party endpoints**”
 - j. enable “**Chat**” and click “**Prevent participants from saving chat**”
 - k. disable “**auto saving chats**”
 - l. enable “**Screen sharing**” and click “**Host Only**” under “Who can share?”
 - m. disable “**Allow removed participants to rejoin**”
 - n. enable “**Breakout room**” and click “**Allow host to assign participants to breakout rooms when scheduling**”
 - o. enable “**Waiting room**” and click “**All participants**” under “Choose which participants to place in the waiting room”

2. **Non-Security settings** under the “**Meeting**” tab in the web version of Zoom at zoom.us:
 - a. audio type – telephone and computer audio
 - b. enable “**Co-host**” – if you need help or must leave the meeting you can assign someone else to take over
 - c. enable “**Always show meeting control bar**”
 - d. enable “**Virtual background**”

3. Internet Connection / Bandwidth

- a. Make sure that you have contacted your internet service provider and have the appropriate level of bandwidth to host videoconferences.
- b. It is also important to make sure you have the right level of internet speed for the bandwidth you are using to maximize the quality of your videoconferencing experience. You may wish to test your speed using a speed test such as <https://www.speedtest.net>

4. Test Zoom

- a. Both the host and the participants should test the Zoom program in advance of a meeting. As a host, you should share the following link with your participants to ensure that at the time of the meeting, they have sorted any troubleshooting ahead of time (video, audio, internet connection, etc.): <https://zoom.us/test>

5. Practice Using the Software

- a. The best way for you to become comfortable with Zoom to practice. Host Zoom meetings with your friends, family members and colleagues. Practice makes better!
- b. Test out features such as waiting room, breakout rooms, screen sharing, etc. in order to be comfortable and confident while using it professionally.
- c. Depending on the subscription level you have chosen (basic, pro or executive) you may not have access to certain features. Be certain you understand the limits of your subscription level whether it be duration of meeting or number of participants.

6. Dual Screens / Monitors

- a. I highly recommend the use of dual screens / monitors. It is practical because it allows you to have your documents open on one screen and Zoom open on the other.
- b. If using dual screens, try to keep Zoom on the screen / monitor where the camera is located because when you speak, you want to be looking directly at the camera.

7. Safety Planning

- a. Be certain to understand how to use some of the host's control features such as:
 - i. Muting participants;
 - ii. Stopping a participant's video; and
 - iii. Removing a participant from the meeting.
- b. Safety plan with clients and/or participants before a meeting.

- c. Pre-set your breakout rooms and assign participants to breakout rooms in advance or at least know how many rooms you will need and who will be going into what room.
- d. When ending the meeting, select end the meeting for all to ensure that no one is left behind in the meeting room. The meeting should end for all and no opportunity should be given to an abuser to abuse his or her victim once everyone else has left the meeting.

8. Retainer Agreement

- a. Please do not forget to modify your retainer agreements to build in client consent to the use of technology, whether it be communication by email or videoconferencing software such as Zoom.
- b. If clients already retained, consider obtaining their consent in writing to communicate using Zoom or any other videoconferencing program.

Zoom Instructions for Hosts – During the Meeting

1. Introduction

- a. The host should first explain to participants that they will be on mute for the duration of the meeting unless they wish to speak or the host requests their participants.
- b. The host should then explain to the participants how each feature in the toolbar can be used to communicate during the meeting. For example, turning audio and video on/off, share the screen, if permitted to do so by the host and the chat feature.
- c. Explain how you will be conducting the meeting and how participants can intervene either by raising their hand or using the raise hand feature in the participants menu.

2. **Encryption** - when you start the meeting, the green padlock on the top left is there and the meeting encryption is on.

3. **Lock Meeting** - when all participants have joined the meeting, click on the “Security” icon in the toolbar and select lock the meeting. This is another security feature in addition to the waiting room and other security settings that you should convey to the participants to ensure they understand that this meeting is secure.

4. **Audio / Video** – be certain everyone is muted and their videos are turned on. Explain how to turn them on and off. It is strongly recommended that the host and participants use headphones, headsets/earphones, webcams, microphones for best audio and video quality. If you are using the device’s audio speakers, you will likely hear feedback and/or echo. Please ensure that you clean your camera lens before each meeting as you want participants to see you as clearly as possible, especially if you are not using a high quality webcam.

5. **Chat** – explain the chat feature to all participants and ensure that they understand how to use the private chat feature as well as the public (everyone) feature appropriately during the meeting. Also explain that files can be shared through the chat. You may want to merge your chat to the meeting window if you want to have the chat open throughout the meeting or in the alternative, leave it closed and when a new message is sent through the chat, the chat icon will flash in orange to notify you that there is a new message.

6. **Breakout Rooms** – before sending everyone in breakout rooms, explain what will happen when they are sent to a breakout room and how they can leave the breakout rooms. Note that you can set the breakout rooms to automatically close after a certain period of time.

7. **Waiting Room** – start to manually let people in the meeting approximately 5 minutes before the meeting begins.

Zoom Etiquette for all Participants

1. **Arrival** – Always arrive to the meeting at least 5-10 minutes before the meeting start time to test your audio and video. Meetings should start at the designated meeting time.
2. **Attire** – Wear professional clothing as you would for any in-person meeting or court appearance. Although videoconferencing may seem informal, we should always adhere to the usual formalities as we would if we were in person unless otherwise permitted by the host. Please do not wear hats or sunglasses unless for medical reasons.
3. **Audio** – If possible, use either a headset, earphones or a microphone rather than your computer or device audio. This will improve both the clarity of your voice and the voice of others you are listening to.
4. **Away** - If you need to step away from the meeting or divert your attention away from the screen, please stop your video and mute your microphone.
5. **Background** - A solid background or a virtual background are ideal settings. If you are using a virtual background, please be certain that it is appropriate. If using Zoom in a “virtual court” or business meeting for example, please select a background keeping in mind that you are in a professional setting. Consider installing a green screen, backdrop or wallpaper that does not look “busy”.
6. **Body Language / Facial Expressions** – Control your body language and facial expressions as they can be a distraction to the host and participants. If disagree with what is being said, make a note of it and when it is your turn to speak, address the issue or concern at that time.
7. **Chat** – The chat feature is a great tool to use during videoconferences if you have a question or wish to send a message or link to either everyone or a particular participant. If you chat privately with a participant, always verify that you have selected the correct participant before sending your message. Please do not chat during the entire meeting.
8. **Confidentiality / Document Storage** – Be certain that you have stored confidential documents or information that may normally be located behind you or within range of the camera’s angle. You may wish to store away any family photos if you are concerned about your family’s privacy.

9. **Distractions** – Do not use your cell phone during a Zoom meeting or do other work. Remember that everyone can see you at all times unless you stop your video.
10. **Food and Beverage** – Try to avoid drinking or eating during the videoconference as you would in any in-person meeting or in a court setting. Please do not chew gum.
11. **Hand-held Devices** - If you are using a cell phone or tablet, please ensure they are on a stable surface or stand to minimize the distortion level of your video.
12. **Lighting** - Do not sit with a source of light behind you (window, lamp, etc.) If the window is not covered, your face may appear dark and can affect your ability to be seen clearly by other participants.
13. **Mute** - Always remain on mute unless it is your turn to speak. Noisy backgrounds make it difficult for participants to hear the host or presenter and are very distracting.
14. **Notifications / Sounds** - Turn off or disable your computer and device notifications and Sounds or shut down all.
15. **Screen Sharing** – If you intend to share your screen, please close all documents, applications and programs you do not wish to share with participants. Verify that the document or window you wish to share is the correct one before you click “share”.
16. **Speak** – If you wish to speak, either use the “raise hand” feature in the toolbar under the “Participants” tab or raise your hand until the host acknowledges your request to speak.
17. **Video** - Position your camera so that you are situated at the center of the frame and the top of your head is as close to the top of the screen as possible. Do not position your camera too close to your face and ensure that the camera is at the correct angle (30/45 degree angle). The camera should be looking at you, not looking up at you.