

Online CDSME Setup Call Instructions

Before making the call

- Log into the Zoom account you plan to use for the workshop and start a meeting with your video on. You will use this later to make sure the person you're calling can connect to the meeting.
 - o It's very important that you use the same account that the workshop will be held on since you'll want the **Meeting ID** and **Password** to be the same.

Introductions

- Introduce yourself as the workshop facilitator, reminding the person that you spoke last week to complete the pre-workshop survey together.
- Remind the participant of the workshop they signed up for (start date, time, schedule)
- Ask the participant if now is a good time to get everything set up for their workshop. This call should take about 15-30 minutes of their time. (if not – when is a better time to call back?)

Accessing the workshop

- Confirm the device that the person will be using to connect (i.e. laptop, tablet, etc)
 - o Confirm that they have internet that connects to this device
 - o Ask them to get a piece of paper and pen to write down the login information so they have it for next time
 - o Explain that you are walking them through the process now so that they can log in on their own for each session.
- Connecting to Zoom
 - o Desktop or laptop
 - Ask the person to open their browser (i.e. Safari, Firefox, Google Chrome, etc.)
 - Tell the person to go to the website zoom.us (you may need to spell it and tell them to click “go” or “enter”)
 - They should see a screen that says “zoom” in big blue letters on the left. If they look on that same line toward the right side of the screen they'll see “Join a Meeting” in blue letters. Ask them to click “Join a Meeting.”
 - They will now see a screen asking for a Meeting ID. Ask them to write down the Meeting ID before typing it in. Give them the Meeting ID and have them click the blue button below that.

Join a Meeting

- **Meeting ID**

Meeting ID or Personal Link Name

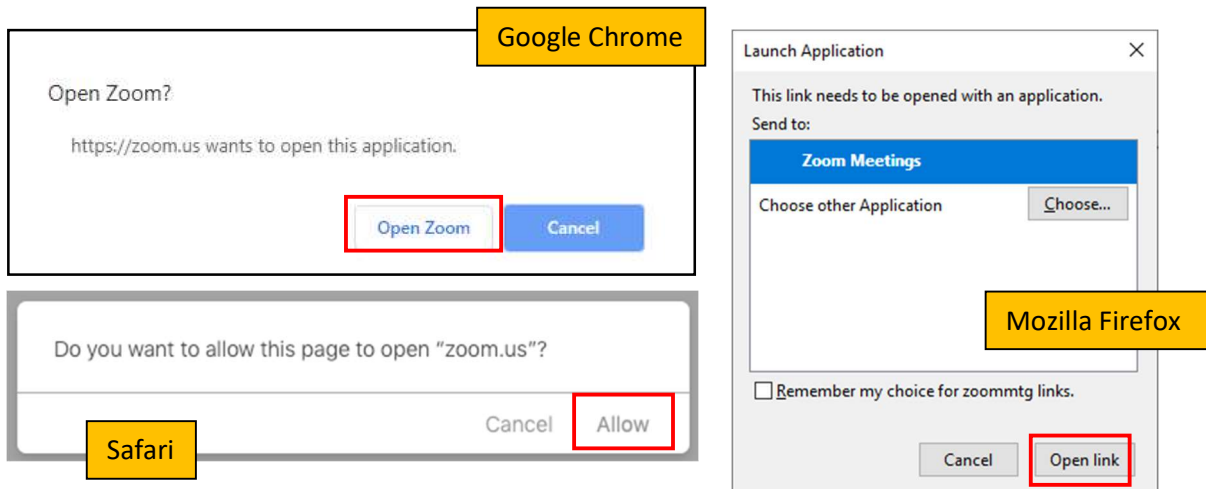
Your meeting ID is a 9, 10, or 11-digit number

Join

Join a meeting from an H.323/SIP room system



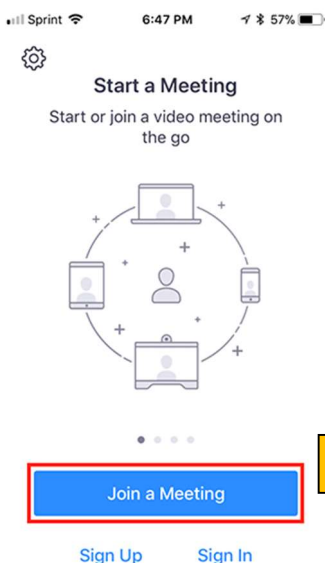
- Depending on what browser they are using and whether they have used Zoom in the past, they may be asked to allow or download the Zoom app. It's best to ask them what they see on their screen so that you can guide them appropriately. Most browsers will allow them to join from their browser instead of downloading if they don't want to download anything.



- They will need the password to join the meeting. Ask them to write down the password before typing it in. Give them the password and have them click to join.
 - Password
- They may be prompted to download the Zoom application or have the option to run Zoom in their browser. If they have previously downloaded Zoom, they will see a popup box that says, "Open Zoom?" and they should click "Open Zoom" at the bottom.
- At this point you should see them show up on your Zoom meeting. If they are prompted, ask them to click to show their video and use their computer audio.
- Once you can see and hear them on the screen, confirm that they can see and hear you. You may hang up the phone call at this point and talk to them via Zoom.

○ Tablet or smartphone

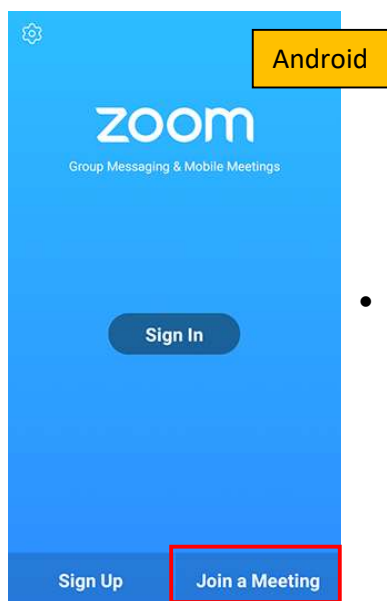
- Highly recommend that the participant download the Zoom app. If they don't want to download the application they can try to join from their browser instead.



iPhone

- For Apple products: Download the app from the App Store
 - From your home screen find the icon that looks like a blue square with a white A in the middle called "App Store" and click it
 - On the bottom right click the "Search" button – it has a magnifying glass icon
 - In the search bar at the top type in "Zoom"
 - Click "Search"
 - You may need to scroll down to find the app called "ZOOM Cloud Meetings" – the icon is a blue square with a white camera icon inside
 - To the right of the icon and title there is a "GET" button. Click that button
 - Depending on their settings, they may need to put in their password or put their finger on the touch ID pad (resting finger on the round button)

- The app will install in just a few moments. When it is done you'll see a blue "Open" button – click that.
- For Android or other products: Download the app from Google Play
 - From your home screen find the icon that looks like a white square with a multicolored sideways triangle in it called "Play Store" and click it
 - They will need to be logged into their Google account (it should automatically be logged in, but if not they will need to log in using their Gmail account)
 - At the top of the screen in the search bar type in "Zoom" and click the search button (magnifying glass icon)
 - You should see at the top left of the screen a blue square with a white camera inside and next to it should say "Zoom Cloud Meetings" – once you find that, click the green "Install" button to the right
 - The app will install in just a few moments. When it is done you'll see a green "Open" button – click that.
- For Windows products: Download the app from the Windows Store
 - From your home screen find the icon that looks like a blue square with a white shopping bag icon and click it.
 - Slide your finger inward from the screen's right edge, and tap the Search icon.
 - Type in "Zoom" and then tap the keyboard's search key.
 - You will see an icon that is a blue circle or square with a white camera icon inside – click on this.
 - You should see a button that says "Install" – click that button
 - The app will install in just a few moments. When it is done you'll see an "Open" button – click that.

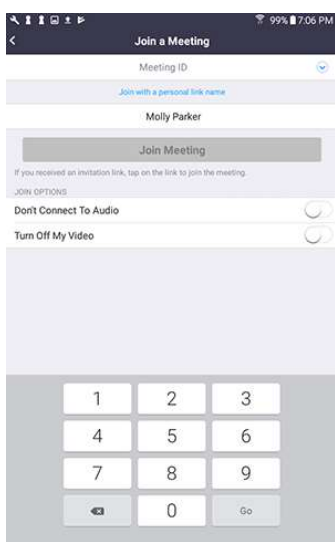


- The app may ask permission at this point to use your microphone and camera. Allow the application to access both. Zoom will only access your microphone and camera when you are actively in a Zoom meeting and you give it permission.
- From the Zoom app you'll see on the first page a blue button at the bottom that says "Join a Meeting" – click this button
- The next thing you'll see is that it's asking for a Meeting ID. Go ahead and input the Meeting ID we'll use for all of our workshop sessions. Ask the participant to write down this ID since they'll use it to log into each workshop session.

• **Meeting ID**

- Underneath where they typed in the Meeting ID they'll see a blue button that says "join" – click this button
- You'll then see a pop-up square asking for a meeting password. Go ahead and input the Meeting Password that we'll be using for all of our workshop sessions. As the participant to write down this password since they'll use it to log into each workshop session, then press "continue"

• **Password**



- The app may ask permission at this point to use your microphone and camera. Allow the application to access both. Zoom will only access your microphone and camera when you are actively in a Zoom meeting and you give it permission.
- The app will have a pop-up window that says “To hear others please join audio” with options. Click “Call using Internet Audio”
- At this point you should see the other person joining the Zoom meeting
- The app may have the participant join without video. If this is the case, ask them to look at the bottom of their screen. They’ll see a red camera icon with a line across it. Underneath it says “Start Video” – click the red icon to start your video. The app may ask permission to access the camera – grant permission.
- Once you can see and hear them on the screen, confirm that they can see and hear you. You may hang up the phone call at this point and talk to them via Zoom.

Closing/Reminders

- Join the Zoom meeting 10 minutes before the workshop start time
- Expect to receive materials in the mail (from Bull Publishing) if they haven’t already been received
- Remind the participant of the workshop start date and time
- Confirm that the information you shared with them today is the same information they’ll need to join the actual session, and that they’ll join with Zoom the same way you did today:
 - Meeting ID
 - Password
- Let the participant know that if we don’t hear them call in on time for the first session, the moderator will be calling them to see if they need assistance.
- Remind the participant that each session will take about 2.5 hours, but there will be a break about halfway through

