



Getting Started With Zoom

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Getting Started With Zoom

Introduction to Zoom

Zoom is a web-based platform that allows you to hold virtual meetings. To ensure confidentiality and security while using the platform, MECASA has established a HIPAA compliant business account with Zoom. Through this account, each center will have access to this platform and its secure features.

This manual will provide information on how to set up your Zoom account and how to host virtual meetings. If you have any questions about Zoom or your account, you can either check out [Zoom's FAQ](#) or contact MECASA.

Information About MECASA's Zoom Account

With MECASA's Zoom account, you can host unlimited meetings for up to fifty people. MECASA has entered into a Business Associates Agreement with Zoom to ensure that our account has the most up-to-date security features available.

Note about security: While Zoom has implemented the highest quality security features, it is important to note that no on-line platform is risk free. If you plan to host clients for support groups or one-on-one meetings using the Zoom platform, please make sure to notify them of these risks and have a signed release on file, per our VOCA and VAWA confidentiality requirements. For more information, contact MECASA.

Best Uses for Zoom

Zoom can be used for a variety of meetings. Some practical uses for Zoom may include:

- Staff meetings with remote employees
- Remote supervision
- Multidisciplinary team meetings
- Client meetings when transportation is a challenge (*with a signed release*)
- Support groups that span a large catchment area (*with a signed release*)

If you are looking to have a quick check-in that doesn't require confidentiality, Skype or Google Hangout may still be a better option. Skype allows users with free IDs to connect via video or instant messaging. While Google Hangouts allows you to connect up to ten individuals through video with a specific meeting link – no separate identification is required.

Verifying Your Account

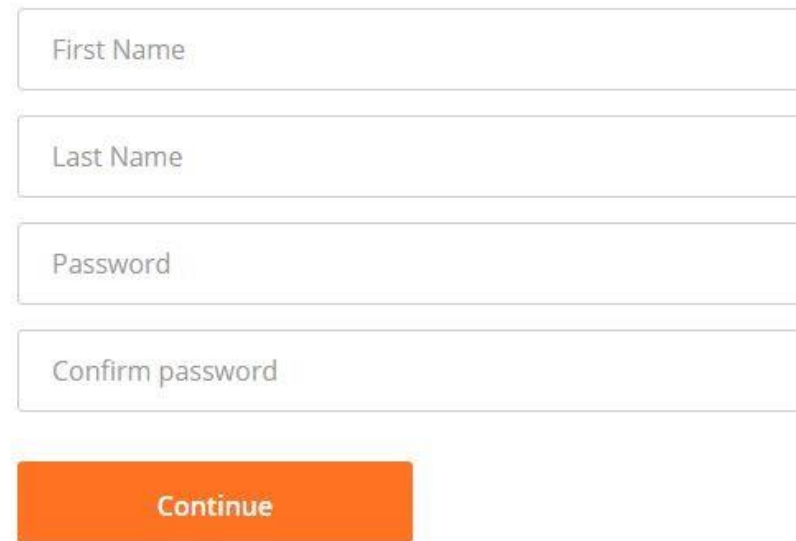
Determine which email address at your organization will be linked to the Zoom account and an email will be sent to this address to add your organization to the MECASA Zoom account.

NOTE: If you do not see it in your inbox, check your junk/clutter email folder.

You will have **30 days to activate your account**. Once you click on the link to verify your account, you will be brought to a page to enter in your name and choose a password.

Welcome to Zoom

Hi, _____ Your account has been successfully activated.
Please set your name and password to continue.

A screenshot of the Zoom account activation form. It consists of four text input fields stacked vertically: 'First Name', 'Last Name', 'Password', and 'Confirm password'. Below these fields is an orange 'Continue' button. The entire form is enclosed in a light gray border.

First Name

Last Name

Password

Confirm password

Continue

Note about Passwords: Your password must have at least six characters. They cannot contain only one character (i.e. 111111 or aaaaaa) and they cannot contain only consecutive characters (i.e. 123456 or abcdef). The stronger the password, the more secure the account is.

Once you click on “Continue”, you will be brought to a page to invite colleagues to a free Zoom account.

NOTE: If you invite co-workers through this step, this will NOT be linked to the MECASA secure and confidential account. In order to be linked to the MECASA secure and confidential account, you would need to receive a link from the MECASA Administrator.

You can click on “Skip this step” to continue with account set-up.

Update Your Profile

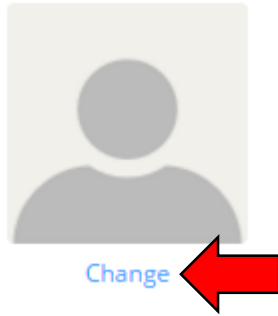
You will be brought to your profile page. From here, you can add a profile picture (your organization logo, perhaps), personalize your Personal Meeting ID, edit your sign-in email, etc.

Changing Profile Picture

To change your profile picture, follow these steps:

- Login to [My Profile](#)

- Select “Change” under the current profile picture



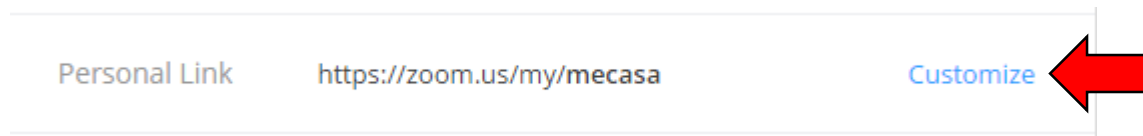
- Click on “Upload”
- Upload your photo
- Click on “Save”

Personalizing Your Meeting ID

Your Personal Meeting ID (PMI) is a permanent virtual room that is specifically assigned to you. When you run a meeting through your Zoom account, your PMI will become part of your URL. For example, if your PMI is 123456789, when you hold a Zoom meeting, the URL will be <https://zoom.us/j/123456789>

You can personalize your personal URL link in your account profile settings. For instance, MECASA’s meeting URL is <https://zoom.us/my/MECASA> To personalize your personal link, you can follow these steps:

- Login to [My Profile](#)
- Click on “Customize” under Personal Link:



- Enter in your personalized URL
- Click on “Save Changes”

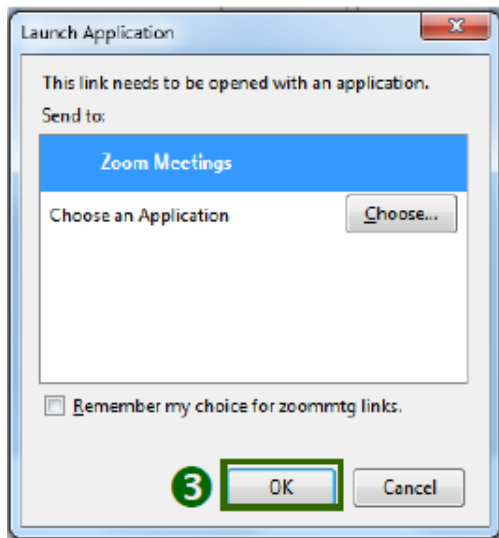
Download Desktop App

For ease of access, you can download the desktop app. To do so, you can follow these steps:

- Sign in to your Zoom account
- Click **Host a Meeting** at the top right hand corner:



- You will be prompted to download the Zoom app. Click **OK** and the app downloads and the Zoom desktop meeting app will open.



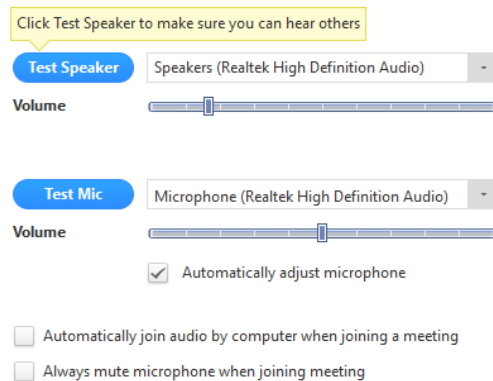
Alternatively, you can click on the download footer link at <https://zoom.us> or directly from <https://zoom.us/support/download>

Preparing for Zoom Meeting

Prior to your meeting, test the audio and video on the device you will be using to host your Zoom meeting.

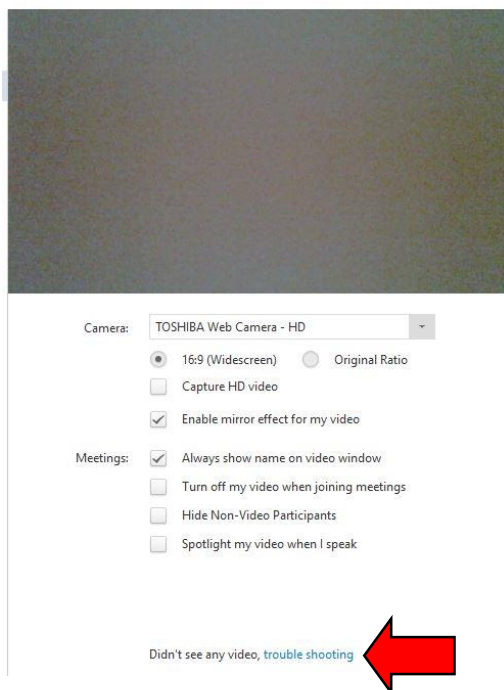
Test Computer Audio

- Open your desktop Zoom app and sign in
- Click on “Settings” in the upper right-hand corner
- Click on the “Audio” in the left-hand settings menu
- Speakers: Click the down arrow to select the speakers you want to use from the drop-down menu
- **Test Speaker:** Click the “Test Speaker” button to hear the piano sound. Use the sound bar to adjust the volume
- Microphones: Click the down arrow to select the microphone you want to use from the drop-down menu
- **Test Mic:** Click the “Test Mic” button to test a microphone on or connected to your device. Use the sound bar to adjust the volume. *Note: The “Test Mic” button is not on Mac computers.*



Test Computer Video

- Open your desktop Zoom app and sign in
- Click on “Settings” in the upper right hand corner
- Click on the “Video” in the left-hand settings menu
- Select video source for Zoom video meeting
- Select or deselect the following video options:
 - Enable mirror effect for my video
 - Always show name on video window
 - Always turn off video when joining meeting
 - Hide non-video participants
 - Capture 720p by default
- If you do not see a video image, you can click on the trouble shooting link



Scheduling Zoom Meetings

There are several ways you can schedule a Zoom meeting. You can do so through the Zoom app or online.

Schedule Through Desktop App

- Open your desktop app and log in to Zoom
- Click on the “Schedule” icon:



- Once you have opened the Zoom Scheduler, you can start to set-up future meetings:

The screenshot shows the 'Schedule a new meeting' window in Zoom. It includes the following sections:

- Topic:** A text field containing 'MECASA's Zoom Meeting'.
- When:**
 - Start:** A date and time selector showing 'Tue January 24, 2017' at '12:00 PM'.
 - Duration:** A selector for '1' hour and '0' minutes.
 - Time Zone:** A dropdown menu showing '(GMT-5:00)Eastern Standard Time' with a link to change it.
 - Recurring meeting:** An unchecked checkbox.
- Video (when joining a meeting):**
 - Host:** Radio buttons for 'On' (selected) and 'Off'.
 - Participants:** Radio buttons for 'On' (selected) and 'Off'.
- Audio Options:** Radio buttons for 'Telephone Only', 'VoIP Only', and 'Both' (selected).
- Meeting Options:**
 - Require meeting password:** An unchecked checkbox.
 - Advanced Options:** A link to expand more options.
- Calendar:** Radio buttons for 'Outlook' (selected), 'Google Calendar', and 'Other Calendars'.
- Schedule:** A blue button at the bottom right to finalize the meeting.

- **Topic:** Choose a topic/name for your meeting (i.e. CAC MDT Meeting).
- **When:** Select a date and time for your meeting.
NOTE: All scheduled meetings can be started by the host at any time, regardless of the date and time settings. For instance, if you enter the time as 1-2 p.m., the host can enter the meeting at 12:30 to prepare for the meeting that starts at 1 p.m.
- **Time Zone:** By default, Zoom will use your computer/device time zone setting. To change the time zone, click on the highlighted link.
- **Recurring meeting:** Choose if you would like a recurring meeting (i.e. the meeting ID will be consistent for the recurring meetings).
- **Video (when joining meeting):** Default video to be on or off for the host and/or participants.
- **Audio Options:** Choose whether to allow users to call in via telephone, VOIP, or both.
- **Password:** You can select and input a password here that joining participants will be required to input before joining your scheduled meeting.
- **Enable join before host:** Allow participants to join your meeting before you log-in.
- **Calendar:** Add to any selected calendar and send out invites to participants.
- **Schedule:** Click here to finish and open up whichever calendar you have selected.
NOTE: Choosing "Other Calendars" will allow you to copy and paste the scheduled meeting information such as date, time, and meeting URL into an email that you may send to invitees.

Schedule Online

- Log-in to your Zoom Account [here](#).
- Click on "Schedule A Meeting" at the top of the page.

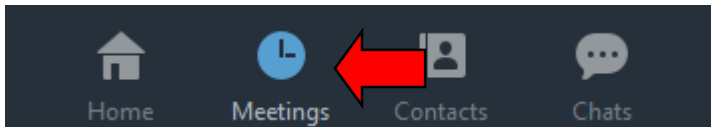
- From here you will have the option to personalize your meeting title, description, date and time, and determine whether it is a recurring meeting. Some other options you will have are:
 - Requiring registration from the meeting attendees
 - Turning the video feature off for host and/or participants
 - Determine which audio preference you want for your meeting
 - Require a meeting password
 - Allow attendees to join the meeting before the host
 - Mute the participants upon entry to the meeting
 - Use your Personal Meeting ID for the meeting
 - Add alternative hosts to the meeting
- Click “Save”

Starting a Scheduled Zoom Meeting

You can start a scheduled Zoom meeting through the Zoom app or online.

Starting Scheduled Meeting Through Desktop App

- Open your desktop app and log in to Zoom
- Click on the “Meetings” icon on the bottom of the app:



- Hover over the appropriate scheduled meeting. You will see the options of Start, Edit, Delete, and Copy
- To start the meeting, click on “Start”
- Your meeting window will open

Starting Scheduled Meeting Online

- Log-in to your Zoom account [here](#)
- Click on “Meetings” on the left-hand menu
- A list of your scheduled meetings will show up under the “Upcoming Meetings” tab
- Go to the appropriate scheduled meeting and click on “Start”
- Your meeting window will open

Joining a Zoom Meeting

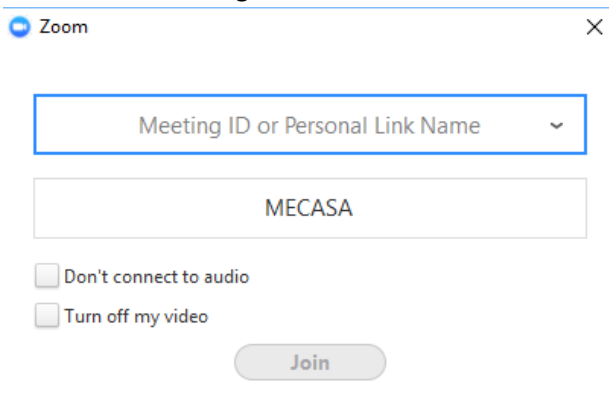
To join a Zoom meeting, attendees can click on the meeting link in the invitation they were sent *or* they can go join a meeting through the Zoom website.

Joining Zoom Meeting Through Desktop App

- Open your desktop app and log in to Zoom
- Click on the “Join” icon:



- Enter in the Meeting ID or Personal Link Name:

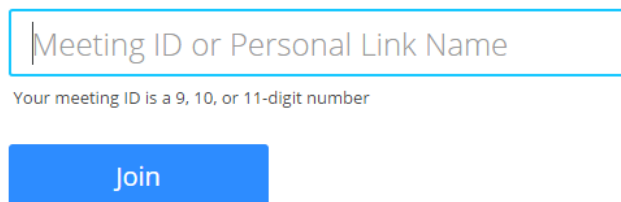
A screenshot of the Zoom application window for joining a meeting. The window has a title bar with the Zoom logo and a close button. Inside, there is a dropdown menu labeled "Meeting ID or Personal Link Name" with a downward arrow. Below this is a text input field containing the word "MECASA". Underneath the input field are two checkboxes: "Don't connect to audio" and "Turn off my video", both of which are currently unchecked. At the bottom center is a rounded "Join" button.

- Determine if you would like to disconnect your computer audio and/or turn off your video
- Click "Join"

Joining Zoom Meeting Online

- Go to www.zoom.us
- Click on "Join A Meeting" at the top of the screen
- Enter in the Meeting ID or Personal Link Name:

Join a Meeting

A screenshot of the web-based Zoom meeting join form. It features a large text input field with the placeholder text "Meeting ID or Personal Link Name". Below the input field is a small note: "Your meeting ID is a 9, 10, or 11-digit number". At the bottom of the form is a prominent blue "Join" button.

[Join a meeting from an H.323/SIP room system](#)

- Click "Join"

NOTE: If you are joining from an H.323/SIP system (i.e. Polycom), you can click on the "Join a meeting from an H.323/SIP room system" link and follow the easy steps to join the meeting. Have the Meeting ID or Personal Link Name readily available to join.

Zoom Meeting Options

Once you have started or joined a meeting, you can perform the following actions from the menu bar located at the bottom of the meeting window:



- **Mute** and **Unmute** your audio and select Audio options.

- Access the Microphone and Speaker options by clicking the up arrow next to Mute. This allows you to change your computer's microphone and speaker choices. You can also access the Audio Settings.
- **Stop** and **Start** the video portion of the meeting.
- Access the video options by clicking the up arrow next to Video. This allows you to change your device's video input.
- **Invite** more people to join by email, instant messaging or a Room System (i.e. Polycom)
- **Manage Participants**, including mute/unmute, lock screen share so only the host can screen share, play enter/exit chime for participants, and lock the meeting.
- **Share Screen** lets you share your screen with meeting participants.
- **Chat** lets you start a private or group chat.
- **Record** lets you start recording the video and audio of the meeting. If you are already recording, you can stop recording by clicking the Stop Recording button in the upper left hand corner of the screen.
- **End Meeting** lets you end or leave the meeting.
- Click **Enter Full Screen** in the upper right hand corner to use full screen mode.

Have a question about Zoom? You can either check out [Zoom's FAQ](#) or contact MECASA!