

**TELEHEALTH USER GUIDE**

# **Zoom for Healthcare Advanced Topics**

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*Note: Materials adopted with permission from NS Health*

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## WAITING ROOMS

The Waiting Room feature allows the host to control when a participant joins the meeting. As the meeting host, you can admit attendees one by one or hold all attendees in the waiting room and admit them all at once. You can send all participants to the waiting room when joining your meeting or only guests, participants who are not on your Zoom account or are not signed in.

## INDIVIDUAL MEETING

Before you can enable Waiting Room for an individual meeting, you must enable it in your meeting settings.

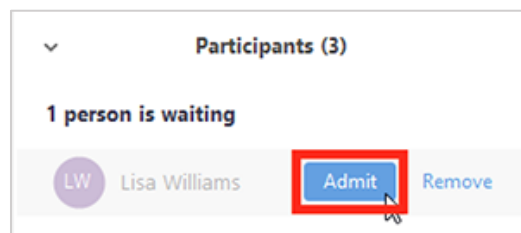
1. Under Meeting Options, check **Enable Waiting Room**.
2. Click **Save**.

A screenshot of a Zoom settings box. It contains a single line with an unchecked checkbox followed by the text "Enable waiting room".

☐ Enable waiting room

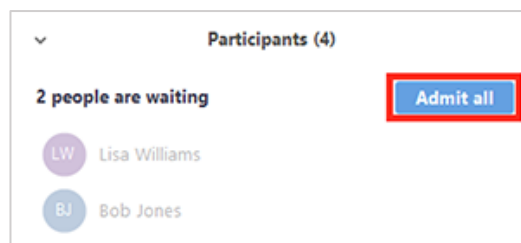
## ADMITTING PARTICIPANTS DURING A MEETING

1. As the meeting host, click **Manage Participants**.
2. Click **Admit** to have the participant join the meeting.



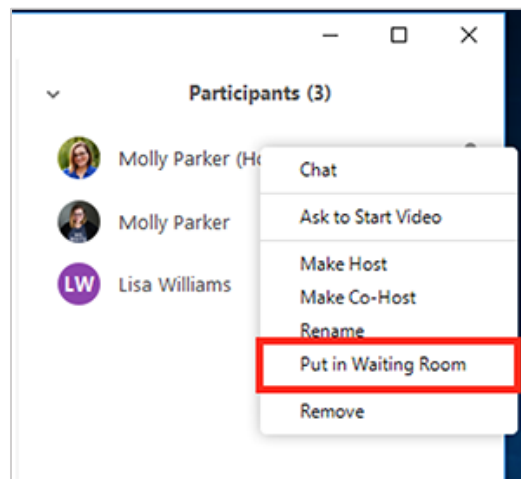
## ADMIT ALL PARTICIPANTS FROM THE WAITING ROOM

1. As the meeting host, click **Manage Participants**.
2. Click **Admit all**.



### SENDING PARTICIPANTS TO THE WAITING ROOM DURING A MEETING

1. As the meeting host, click **Manage Participants**.
2. Click **More** next to the participant's name and choose **Put in Waiting Room**.



### SENDING MESSAGES TO PARTICIPANTS IN THE WAITING ROOM

1. As the meeting host, click **Chat**.
2. Click the dropdown next to **To:**
3. Click **Everyone (in Waiting Room)**.
4. Type and send your chat message to the waiting room. Once the message has been sent, the participants in the Waiting Room will see the message on the Waiting Room screen.

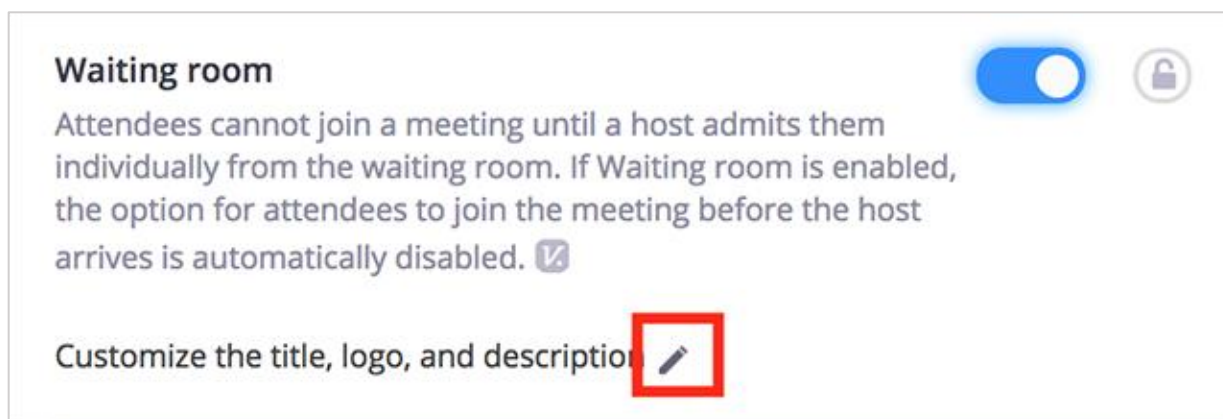


## WAITING ROOM CUSTOMIZATION

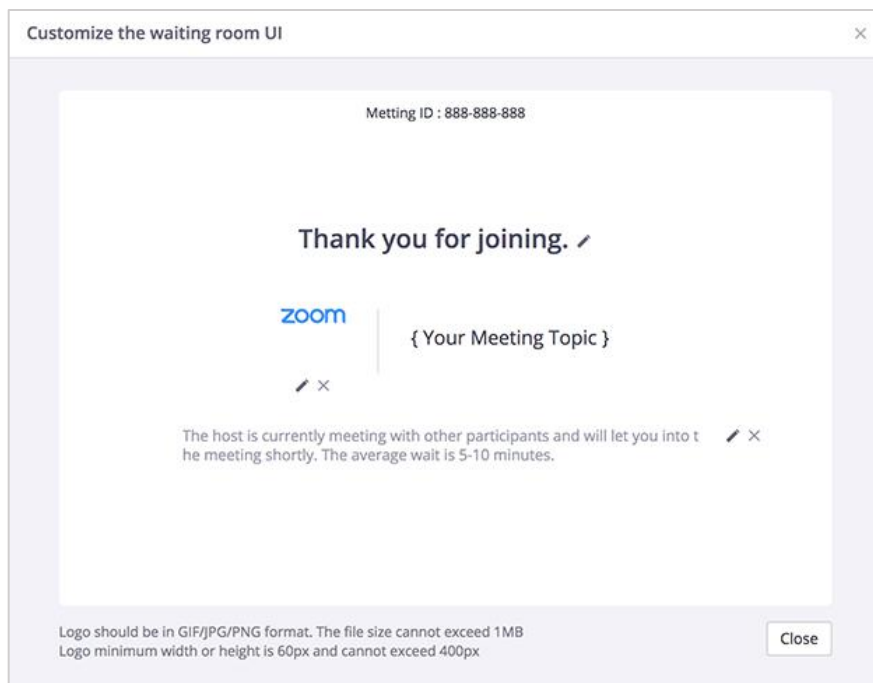
You can customize the Waiting Room title, logo, and description. This is recommended. For example, your office/name will help identify you.

**Note:** You will need to enable Waiting Room before you have the option to customize it.

1. After enabling waiting room, navigate to the **Waiting Room** option under **In Meeting (Advanced)**.
2. Click the pencil icon below the **Waiting Room** option.



This will open the Waiting Room customization options.



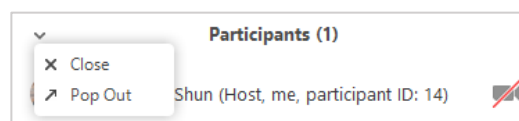
- **Title:** Click the pencil icon next to **Please wait, the meeting host will let you in soon.** To update the meeting title. Click ✓ when you are done.  
**Note:** Titles are limited to 64 characters.
  - **Logo:** To upload a logo, click the pencil icon.  
**Note:** Logos can be in GIF, JPG or PNG format. They cannot exceed 1MB. The minimum height and width is 60px and the maximum is 400px.
  - **Description:** Click **Add waiting room description** to add a description to the Waiting Room. Click ✓ when you are done.  
**Note:** The description is limited to 400 characters.
3. Click **Close** when you are done.
  4. Participants will see your custom Waiting Room branding when they join the meeting.

## MANAGING PARTICIPANTS

As the host in a meeting, you can manage the participants. This will help with noise reduction, management of participation of a larger group, etc.

### CONTROLS FOR MANAGING PARTICIPANTS

1. Click **Manage Participants** in the host controls to display the participants list.
2. Click the drop-down menu located at the top-left corner to close the participants list or click **Pop Out** to separate the participants list from the meeting window.
3. Hover over a participant and click **More** for these options:



## ROLES IN A MEETING

There are multiple roles available for a meeting: host, co-host, alternative hosts, and participants. The role you have in a meeting is designated by the host.

- **HOST:** The user that scheduled the meeting. They have full permissions to manage the meeting. There can only be one host of a meeting.
- **CO-HOSTS:** Shares most of the controls that hosts have, allowing the co-host to manage the administrative side of the meeting, such as managing attendees. The host must [assign a co-host](#) during the meeting. Co-hosts cannot start a meeting. If a host needs someone else to start the meeting, they can assign an [alternative host](#).

**Co-hosts** cannot start meetings scheduled by the host. Co-hosts cannot be assigned ahead of time. The host has to promote a participant to co-host. Alternatively, the host can assign a user as an [alternative host](#).

- **ALTERNATIVE HOSTS:** Shares the same controls as co-hosts, but can also start the meeting. Hosts can assign alternative hosts when they schedule a meeting.

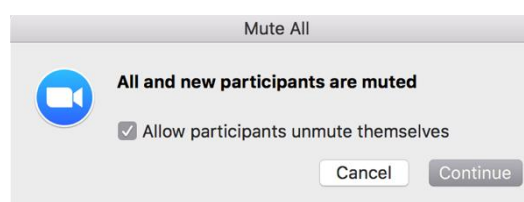
**Note:** If you need to schedule a meeting on behalf of another user, use [scheduling privilege](#).

**Alternative hosts** can start the meeting by using the meeting ID or meeting link from the invitation email. The meeting will not display in the upcoming meetings list in the desktop client or mobile app for alternative hosts.

## MUTE ALL AND UNMUTE ALL

You can **mute** all participants that are already in the meeting as well as new participants joining the meeting.

1. Select **Manage Participants**.
2. Select **Mute All**.
3. You will be prompted to **Allow participants to unmute themselves**. Clicking **Continue** will mute all current and new participants.



## INVITING OTHERS TO JOIN THE MEETING

1. Click **Invite** at the bottom of the participant's panel.
2. Choose on the following invite options: **Default Email**, **Copy URL**, or **Copy Invitation**.

## SECURITY OPTIONS

The Security icon in the meeting controls allows the host or co-host of a meeting to enable or disable options during a meeting to secure the meeting and minimize disruption during the meeting. Available security settings are:

- **Lock Meeting:** Locks the meeting, preventing new participants from joining the meeting.
- **Enable Waiting Room:** Enables **Waiting Room** for incoming new participants or to move current participants into the Waiting Room.
- Allow participants to:
  - **Share Screen:** Allows host to start Screen Shares.
  - **Chat:** Allows participants to use the chat function.
  - **Rename Themselves:** Allows participants to rename themselves from the Participants panel.
  - **Annotate on Shared Content:** Allows participants to **annotate** over content shared during the meeting. The host can enable or disable annotation when the host is sharing.
  - **Remove Participant:** Allows the removal of a participant from a meeting. The participant cannot re-join unless **Allow removed participants to rejoin** is enabled in **Meeting settings**.

## SHARING YOUR SCREEN

### SCREEN SHARING A POWERPOINT PRESENTATION

There are three methods you can use to screen share a PowerPoint presentation in a Zoom meeting. If you have a dual monitors, you can share a slide show while viewing presenter's notes in another monitor. If you have a single monitor, you can also start the slide show in a window so you have access to other meeting features while sharing your presentation.

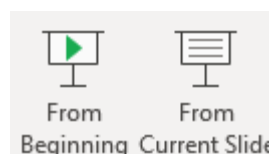
#### Dual monitors with slide show and presenter's views

Follow these steps if you are using dual monitors and want to present your PowerPoint file in one monitor while viewing the presenter's notes in another monitor.



Open the PowerPoint file you want to present.

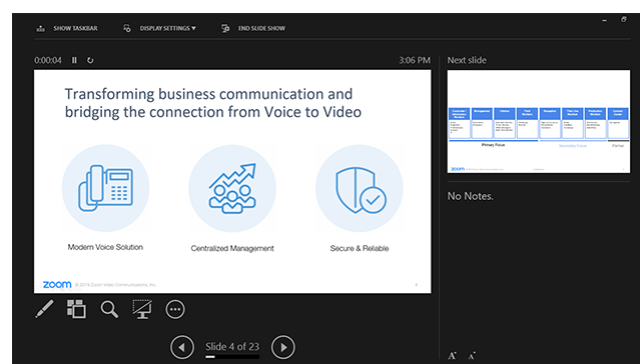
1. Start or join a Zoom meeting.
2. Click **Share Screen** in the meeting controls.
3. Select your primary monitor then click **Share**.  
If you are not sure which monitor is your primary, select the one that PowerPoint opens in.
4. While sharing your screen, switch PowerPoint to slide show mode by clicking the **Slide Show** tab > **From Beginning** or **From Current Slide**.



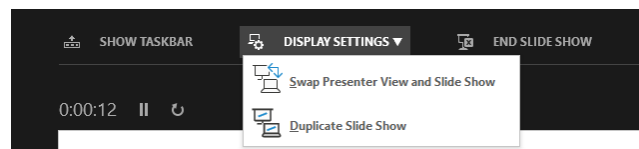
If you correctly shared your primary monitor, participants will see the PowerPoint in slide show view. The green border indicates the monitor you are currently sharing.



The presenter's view will appear on your secondary monitor. Use this to view your slide notes and control the presentation.



- If you are not sharing the correct monitor, click **Display Settings** then **Swap Presenter View and Slide Show**. PowerPoint will switch the monitor that is used for slide show view.



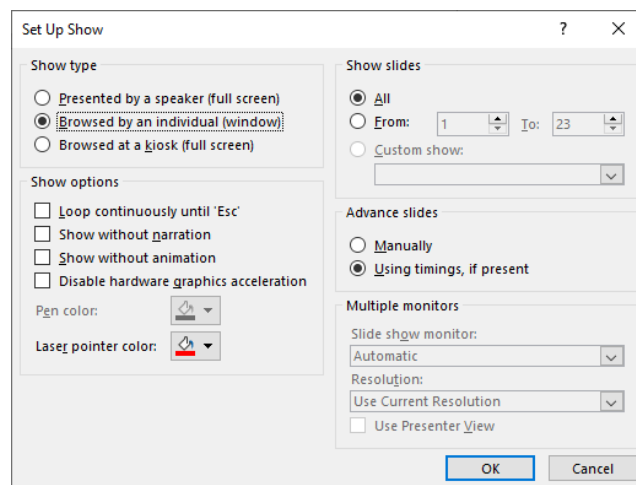
Alternatively, you can click **New Share** on your screen share controls and select the screen showing the PowerPoint in slide show view.



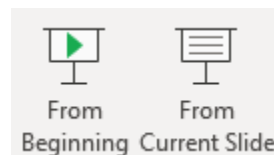
## SINGLE MONITOR SETUP WITH SLIDE SHOW VIEW IN A WINDOW

Follow these steps if you have a single monitor and want to share your PowerPoint presentation in slide show view, but have it contained in a window rather than in full screen. This is useful if you need to access meeting features like in-meeting chat or managing participants while sharing your PowerPoint presentation.

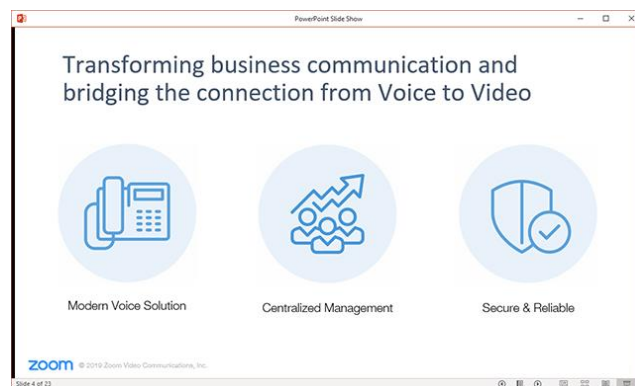
- Open the PowerPoint file you want to present.
- Click the **Slide Show** tab then **Set Up Slide Show**.
- Under **Show type**, select **Browsed by an individual (window)**, then click **OK**.



- Switch PowerPoint to slide show mode by clicking the **Slide Show** tab > **From Beginning** or **From Current Slide**.



PowerPoint will display the slide show in a window.

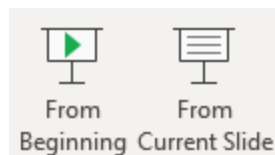


- In Zoom, start or [join a meeting](#).
- Click **Share Screen** in the meeting controls.
- Select the PowerPoint window then click **Share**.



### SINGLE-MONITOR SETUP WITH SLIDE SHOW IN FULL SCREEN

- Open the PowerPoint file you want to present.
- Start or join a Zoom meeting.
- Click **Share Screen** in the meeting controls.
- Select your monitor then click **Share**.
- While sharing your screen, switch PowerPoint to slide show mode by clicking the **Slide Show** tab > **From Beginning** or **From Current Slide**.

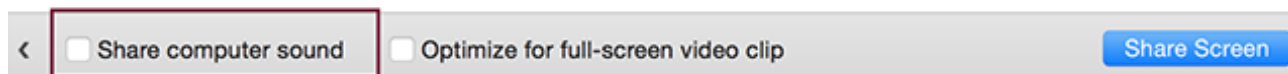


The green border indicates the monitor you are currently sharing.



## SHARING VIDEO SOUND

To share computer audio such as YouTube, Pandora, etc. during screen sharing, click on **Share Computer Sound**.



## WHITEBOARDS

The Whiteboard feature allows the host and participants to draw on a white screen during a Zoom session.

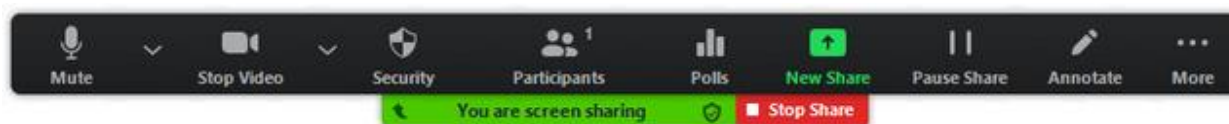
### SHARING A WHITEBOARD

1. Click the **Share Screen** button located in your meeting tool bar.
2. Click **Whiteboard**.
3. Click **Share**.
4. The [annotation tools](#) will appear automatically, but you can press the **Whiteboard** option in the meeting controls to show and hide them.
5. Use the page controls in the bottom-right corner of the whiteboard to create new pages and switch between pages.



**Note:** Only the host or co-host that started sharing the whiteboard has access to create and switch pages.

- When you are done, click **Stop Share**.



## POLLING FOR MEETINGS

### CREATING A POLL

- Go to the **Meetings** page and click on your scheduled meeting. If you do not have a scheduled meeting, [schedule a meeting](#) now.
- From the meeting management page, scroll to the bottom to find the **Poll** option. Click **Add** to begin creating the poll.
- Enter a title and your first question. Check the box to make the poll anonymous, which will keep the participant's polling information anonymous in the meeting and in the reports. Select whether you want the question to be single choice (participants can only choose one answer) or multiple-choice question (participants can choose multiple answers).
- Type in the answers to your question and click **Save** at the bottom.
- If you would like to add a new question, click **Add a Question** to create a new question for that particular poll.
- You can add more polls by repeating **Step 2**.

You can also create a poll by clicking **Polling** during the meeting. This will open up your default web browser where you can add additional polls or questions.

**Note:** You can only create a max of 25 polls for a single meeting.

### Downloading a report of poll results

You can download a report of the poll results after the meeting. If registration was turned on and the poll was not anonymous, it will list the participants' names and email addresses. If registration was not on, it will show the results, but list the participants as "Guest". If the poll was anonymous, it will show "anonymous" for the participants' names and email addresses.

## BREAKOUT ROOMS

Breakout rooms allow you to split your Zoom meeting in up to 50 separate sessions. The meeting host can choose to split the participants of the meeting into these separate sessions automatically or manually and can switch between sessions at any time.

### CREATING BREAKOUT ROOMS

1. Start a scheduled meeting.
2. Click **Breakout Rooms**.
  - Select the number of rooms you would like to create, and how you would like to assign your participants to those rooms:
  - **Automatically**: Let Zoom split your participants up evenly into each of the rooms.
  - **Manually**: Choose which participants you would like in each room.
3. Click **breakout rooms**.
4. Your rooms will be created, but will not start automatically. You can manage the rooms prior to starting them by following the instructions below.

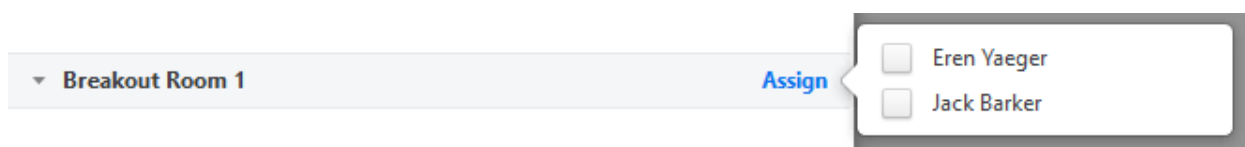
### OPTIONS FOR BREAKOUT ROOMS

1. After creating the breakout rooms, click **Options** to view additional breakout room options

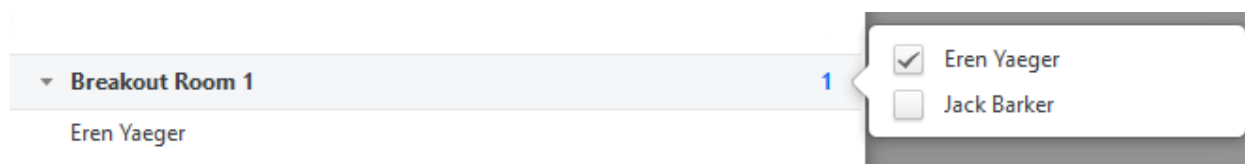
2. Check any options that you would like to use for your breakout rooms.
  - **Move all participants into breakout rooms automatically:** Checking this option will move all participants into the breakout rooms automatically. If this option is unchecked, the participants will need to click **Join** to be added to the breakout room.
  - **Allow participants to return to the main session at any time:** If this option is checked, the participants can move back to the main session from their meeting controls. If this is disabled, they need to wait for the host to end the breakout rooms.
  - **Breakout rooms close automatically after x minutes:** If this option is checked, the breakout rooms will automatically end after the configured time.
  - **Notify me when the time is up:** If this option is checked, the host will be notified when the breakout room time is up.
  - **Countdown after closing breakout rooms:** If this option is checked, the participants will be given a countdown of how much time they have left before being returned to the main room.
3. Follow the steps below to assign participants to rooms or click **Open All Rooms** to start the breakout rooms.

### ASSIGNING PARTICIPANTS TO ROOMS

To assign participants to your rooms, select **Assign** next to the room you wish to assign participants to and select participants you want to assign to that room. Repeat this for each room.



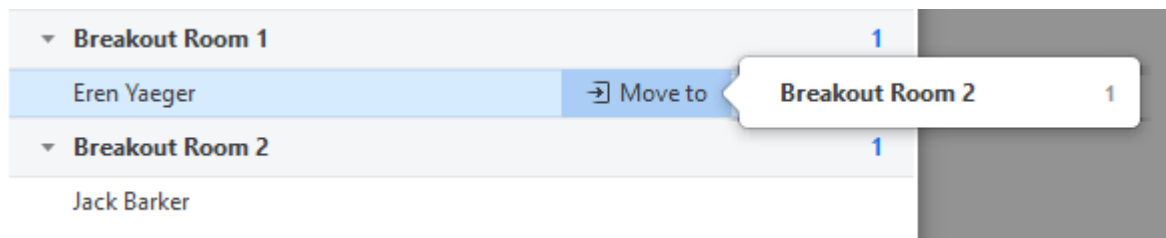
Once a participant has been assigned (manually or automatically), the number of participants will show in place of the **Assign** button.



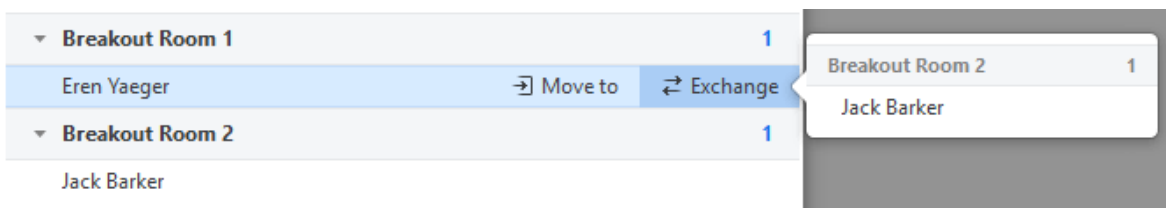
## PREPARING BREAKOUT ROOMS

After manually or automatically assigning participants to rooms, you can rearrange the participants. Participants who are not assigned to breakout sessions will remain in the main meeting when the rooms are started.

- **Move to** (participant): Select a room to move the participant to.



- **Exchange** (participant): Select a participant in another room to swap the selected participant with.



- **Delete Room**: Delete the selected room.
- **Recreate**: Deletes existing breakout rooms and creates new ones.
- **Add a Room**: Add another breakout room.
- **Open All Rooms**: Start the rooms. All participants will be moved to their respective rooms after confirming the prompt to join the breakout room. The host will be left in the main meeting until manually joining one of the rooms.



## MANAGING BREAKOUT ROOMS IN PROGRESS

Once the breakout rooms have been started, the participants will be asked to join the Breakout Session. The host will stay in the main meeting until joining a session manually. If a participant has not joined the session yet, it will be noted by **(not joined)** next to their name.

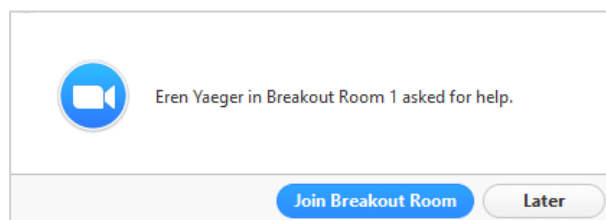
- **Join:** Join the breakout room.
- **Leave:** Leave the room and return to the main meeting (only shows when in a breakout room).
- **Close All Rooms:** Stops all rooms after a 60 second countdown, shown to the host and participants, and returns all participants back to the main meeting.

## RESPONDING TO REQUESTS FOR HELP

Participants in breakout rooms can request that the meeting host join their meeting by clicking **Ask for Help**.




You will be prompted to join the room where the request originated from. Click **Join breakout room** to join the room.



## BROADCASTING A MESSAGE TO ALL BREAKOUT ROOMS

The host can broadcast a message to all breakout rooms to share information with all participants.

1. Click **breakout rooms** in the meeting controls. 
2. Click **Broadcast a message to all**, enter your message and click **Broadcast**.
3. The message will now appear for all participants in Breakout Rooms.

From Molly Parker to everyone: We will be returning to the main room in 5 minutes.