

# Zoom Meeting Guidelines

Virtual Site Visits

01.04.21 Version



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## Preface

Please note that this document is a **work-in-progress**. We will be updating it as we solicit feedback and lessons learned from site visitors.

We welcome your feedback. If you have any tips, recommendations or questions, please email them to [accreditation@asha.org](mailto:accreditation@asha.org).

Thank you!

## Overview

Accreditation Staff will provide Zoom meeting support and training for the scheduled two-day site visit as well as one advance preparation meeting for the site visit team. The site visit meetings will be scheduled during business hours on weekdays by the Accreditation Staff.

If the Site Visit Team would like to set up meetings at other times, e.g., additional preparation meetings before the site visit, or interviews scheduled outside the site visit window they may request them in advance from the Accreditation Staff.

Accreditation Staff may be able to set up additional Zoom meetings outside of the scheduled site visit dates, however they will not be able to provide technical support outside of business hours. Also, requests for additional meetings are constrained by the number of available Zoom accounts so limitations may apply.

If Accreditation staff are not able to provide additional Zoom meetings outside of the scheduled site visit, we recommend that the site visit team use whatever conference call systems they have access to or set up a free personal Zoom account. Directions for setting up a free personal Zoom account are below. Accreditation staff will not be available to offer technical support outside of business hours.

## Before Your Site Visit

### Download the Zoom app

Download the Zoom app to your computer or other device. This will automatically happen when you log in for the meeting. However, we encourage you to do so beforehand so you can test it out, sync hearing aids, troubleshoot as needed in advance, etc. The Zoom download may be found here:

<https://zoom.us/download>.

### Test a Zoom Meeting

Before your first Zoom meeting, we recommend [joining a test Zoom meeting](#) to familiarize yourself with Zoom and test out your microphone and speakers. Visit [zoom.us/test](https://zoom.us/test) and click Join.

### Internet Connection

Please ensure that you have an adequate internet connection.

If you experience any issues with latency, frozen screens, poor audio quality or a meeting getting disconnected while using a home or non-enterprise WiFi connection, please review the [connection issues information](#) from Zoom.

### Get Your Audio Resources Ready

#### Use Earbuds/Headphones with Computer or Other Device

You'll have the option of connecting to audio via your computer or your phone. For the best audio quality, we recommend, but do not require, using the phone with earbuds or headphones if available (a Bluetooth or USB connection may be required). Many ear buds and headphones have noise-canceling technologies that can make it easier to hear the dialogue in the meeting, without needing to increase

the volume, and reduce the background noise of your setting. You may want to experiment with different styles of headphones to identify which style affords you the best listening experience.

### Sync Up with Hearing Aids

If you wear hearing aids, ask your audiologist if there is a connectivity option that would allow your hearing aids to connect via Bluetooth directly to the device you use for virtual meetings.

### Free Personal Zoom Accounts

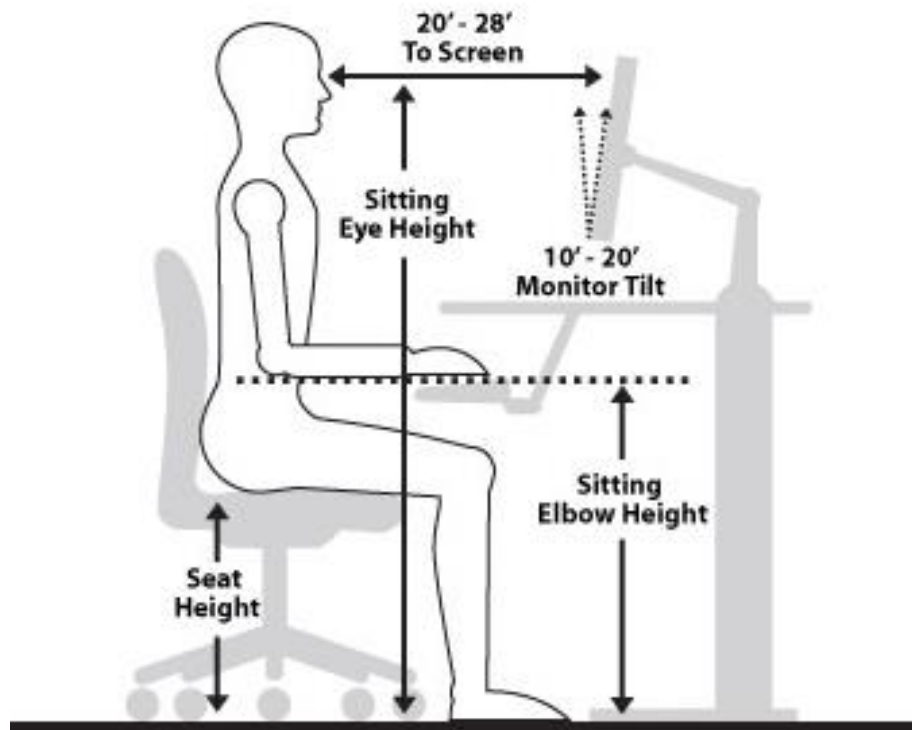
To sign for a free personal Zoom account visit, visit <https://www.zoom.us/> and click on “sign up for free”. You’ll be asked to enter your e-mail address. You’ll receive an email from Zoom ([no-reply@zoom.us](mailto:no-reply@zoom.us)). In the email, there will be an “activate account” link to click on. See Zoom’s [Quick Start guide](#) for new users for information about setting up your account and scheduling your first meeting.

Please note that the free Zoom accounts have the same level of security as the meetings set up by the Accreditation Staff, however **the major limitation is a meeting duration limit of 40 minutes on Zoom meetings with 3 or more participants**. We recommend that these meetings be set up with the waiting room function enabled to allow the additional security step of admitting all participants, however this may not be necessary if the meeting is only needed for the site visit team.

**Please remember that recording any portion of the site visit is not allowed.**

## Ergonomics

Zoom meetings tend to involve a lot of time sitting in front of a computer. Please ensure that you scheduled adequate breaks into the site visit schedule for moving around. If you are taking part in the site visit from a home office, we recommend using a comfortable, supportive desk chair and ensuring that your workstation set-up is ergonomic. There are many [resources online](#) about ergonomics.



*Safety Ergonomic Poster grey diagram showing how to sit at a computer work station*  
Source: demco.com

## During your Site Visit

Accreditation staff will open the Zoom meeting and assign the SV Chair as the host and the rest of the site visit team as co-hosts. The SV Chair may elect to have another site visit team member act as the Zoom host. The Site Visit team will then manage the Zoom meeting and the representatives from the academic program will join the meeting as scheduled.

### Having Technical Difficulties?

Send an email to staff at [accreditation@asha.org](mailto:accreditation@asha.org). Staff will be available during business hours (Eastern Time).

### Join the Meeting

Before the site visit, the site visit team will receive the meeting access information from the Accreditation Staff like the example below. The site visit team will share the meeting invitation information with the program director, who in turn should share with the scheduled participants.

The meeting access information includes the log on details, the meeting link, the password, the meeting ID, and telephone numbers (if using phone for audio). Click on the Zoom meeting URL to access the meeting. It will prompt you for a password. You will be placed in a virtual waiting room until the meeting starts.

CAA Accreditation is inviting you to participate in the Zoom meeting.

Topic: Site Visit for "Temple University"

Time: Sep 10, 2020 08:00 AM Eastern Time (US and Canada)

Join the Zoom meeting at

<https://asha.zoom.us/meeting/register/123456>

Password: 123456

Dial by your location

+1 301 715 8592 US (Germantown)

+1 312 626 6799 US (Chicago)

+1 929 205 6099 US (New York)

+1 346 248 7799 US (Houston)

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US (Tacoma)

Meeting ID: 123 4567 8999



## Log on early

Accreditation staff will open the Zoom meeting for the site visit team each day. Please log on to Zoom approximately 15 minutes early to set up your computer to troubleshoot any audio issues you may encounter. Once you enter the meeting you'll be muted, and your video will be off until you turn it on. Accreditation staff will then designate the Site Visitor Chair as the Zoom host and the rest of the site visitor team as co-hosts. Once the sound and audio checks are completed, the staff member will leave the Zoom meeting.

Program participants will be held in a virtual waiting room until the Zoom host or co-host lets them into the meeting.

If you have any problems, staff will have time to troubleshoot before the site visit gets started. Please e-mail [accreditation@asha.org](mailto:accreditation@asha.org) if you need any technical assistance.

## Phone participation code

If you use your phone for the audio portion, you should be sure to enter the *participant code* when prompted on the phone. This code will be displayed on your computer when you click on the meeting URL. If you neglect to do so, you'll be displayed as two individuals (one for video and one for audio) which will make it difficult to efficiently move you out of the waiting room.

If you mistakenly enter the meeting with two separate displays, you can easily correct this by selecting *Join Audio* (the icon at the bottom left corner of your functions menu). You will see a display "*already joined by phone? Enter # code #*". Just enter the participant code in your phone with a hash mark at the beginning and end of the code.

## Waiting Room

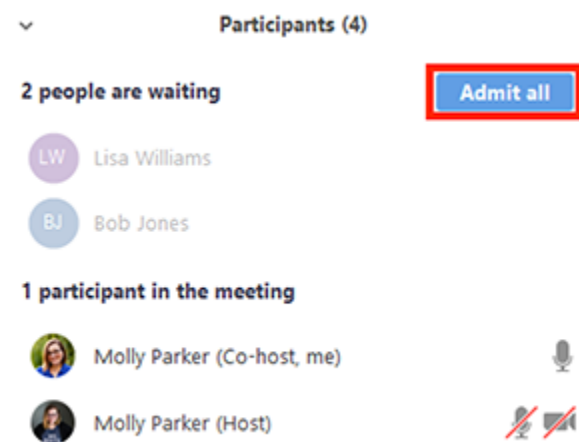
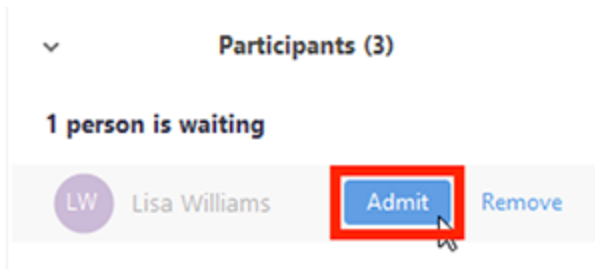
The waiting room function will be enabled for the site visit. This will provide an additional layer of security; it allows the Site Visit Team (Zoom host and co-hosts) to control when a participant joins the meeting. The Site Visit Team will move participants from the waiting room into the meeting at the scheduled time. This prevents any participants from inadvertently entering a meeting in progress and allows the meeting host to ensure confidentiality.

Accreditation staff will initiate the Zoom meeting at the beginning of the site visit and then designate the SV Chair and Team as the Zoom host and co-hosts. This will allow the site visit team to run the site visit via Zoom and admit participants from the waiting room as scheduled.

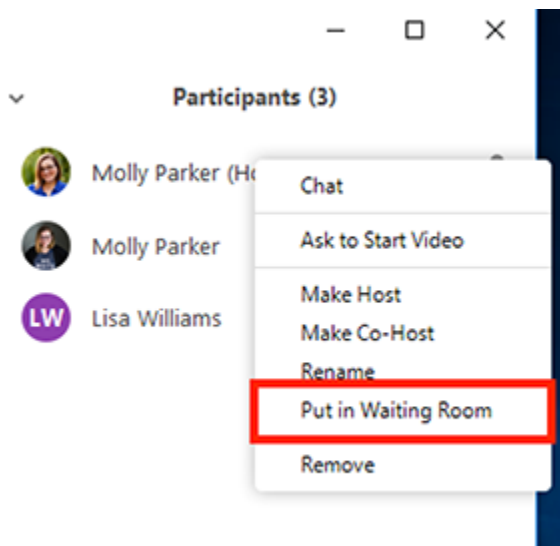
## Managing the Waiting Room

As the Zoom host or co-hosts, any member of the site visitor team may manage the Waiting Room.

Tap "Manage Participants". You'll see a list of participants in the meeting and those waiting to be admitted. Tap on "admit" to move a participant into the meeting. This can be done individually or click on "admit all" for moving all participants into the meeting at once.



Participants can also be moved from the meeting into the waiting room. To do so, open the “manage participants” menu, select the participant and select “put in Waiting Room”.

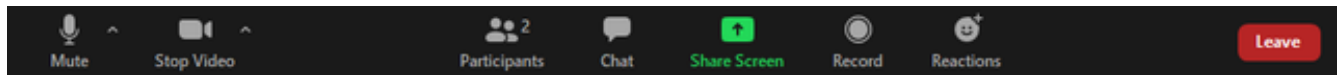


The Site Visitor Team can also send a message to the participants in the Waiting Room. This is especially helpful if the meeting is running late.

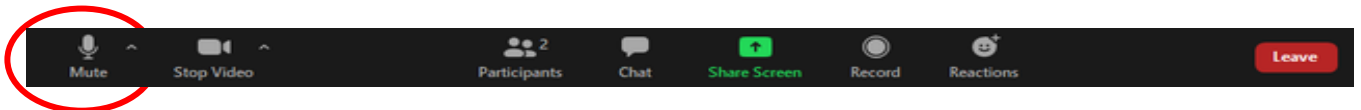
1. Click on the “Chat” icon
2. Click the dropdown menu next to “To:”
3. Click on “Everyone (in Waiting Room)”
4. Type and send your chat message.

## Attendee Controls in a Meeting

The attendee controls/menu appear at the bottom of your screen. You may have to hover over it to have the menu float up to display.



### Mute / Unmute



Mute and unmute your microphone. If the red diagonal line is showing on this microphone icon, you are muted. Audio Controls (click the ^ arrow next to Mute / Unmute): Allows you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full [audio settings](#).

Use the following [keyboard shortcuts](#) to mute or unmute yourself.

- Windows: Alt + A
- Mac: Shift + Command + A

If your line is muted, you can temporarily unmute yourself by holding the spacebar down while you are speaking (kind of like a walkie-talkie).

When you are not speaking, please keep your microphone muted. When multiple people are participating in an online meeting, the collective background noise from each participant’s environment as well as sounds of typing, pets barking, and so forth, can be disruptive.

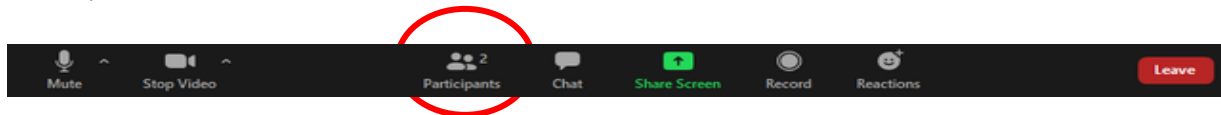
### Start Video / Stop Video



Clicking on this icon turns your camera on or off. If the red diagonal line is showing on this camera icon, your video is not displayed.

Video Controls (click the ^ arrow next to Start Video / Stop Video): Change cameras if you have multiple cameras, select a virtual background (if enabled), or access your full video settings. Because of bandwidth, we ask attendees to keep video off when discussions are not in progress.

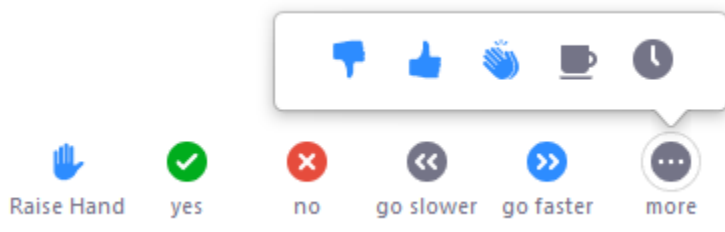
## Participants



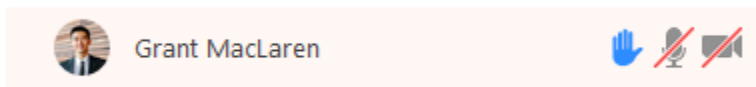
This icon will bring up a display of the participants currently in the meeting. This icon is also where you can access the non-verbal feedback icons.

### Non-verbal feedback icons

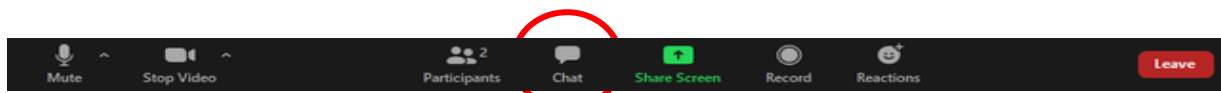
Click on the Participants icon to display additional icons to provide non-verbal feedback to the facilitators. This is where you can raise your hand to ask questions, as well as indicate agreement, request the pace change and indicate that you've stepped away for a break (coffee cup icon).



The active icon will appear next to your name on the participant list. In the example below, Grant McLaren is raising his hand.



## Chat



Access the chat window to chat with the participants. [Learn more.](#) If you want to ask a question during the site visit, please enter it in the chat box. The presenters will pause periodically to address questions posted in the chat. Site visitors will be monitoring throughout the visit. You have the option of asking everyone or sending a private message to specific recipients. Private messages between participants are not viewable by the host (unless the host is involved in the private chat as the sender or recipient).

## Share Screen



Start a screen share (if the host allows). You will be able to select the desktop or application you want to share. [Learn more.](#)

## Record

For the site visit, the ability to record the session has been deactivated.

## Reactions



There are few additional non-verbal options under Reactions. You can wave or give a thumbs up without disrupting flow of meeting. The icons will appear on your participant block, even if you have your video off.

## Leave (Don't Touch That Button!)

We ask that if you need to step away from the meeting that you turn off your **video/audio** if not already muted and, if needed, send a chat to the site visitors if you need to be away for a long duration. Clicking on the "Leave" button disconnects you from the meeting while it continues for the other participants. Only the host can [end the meeting for all](#).

If you inadvertently leave the meeting, please use the Zoom link provided to reconnect to the meeting. You will be again placed in the Waiting Room and then re-admitted to the meeting, so there may be a brief delay.

## How to see everyone on Zoom

Zoom has three video layouts: Active Speaker, Gallery View (think of the Brady Bunch opening credits) and Mini. You can toggle between these layouts.



During presentations, we recommend that you use the Active Speaker view so you can see the PowerPoint slides and individual(s) speaking. When in breakout rooms, it will be helpful to use the Gallery View to see everyone in your group in a grid format.

## How to enlarge the shared screen

In Zoom meetings we frequently receive requests from participants to enlarge the shared screen. This is best done on your own screen view. To enlarge your view, click on "View Options" at the top of your screen. You will see a drop-down menu and can select a size option of 100% or higher percentage for an enlarged view.

## Breakout Rooms

Breakout rooms are an excellent way to manage simultaneous interviews or meetings during the site visit.

Only one person, the Zoom host, can manage the breakout rooms. Co-hosts do not have the functionality to manage breakout rooms. The host may designate another site visitor to act as host and manage the breakout rooms. To change the participant designation from co-host to host, the host should open the participant menu and click next to the co-host's name to change their designation.

When the site visitor who is acting as the Zoom host has a meeting, he or she should conduct that in a breakout room rather than the main meeting room. This is helpful to avoid any interruptions from other site visitors who may have completed their interviews early and return to the main meeting room.

For any site visitor trainees, please discuss with your site visit chair if you will be scheduled to be in a breakout room with another site visitor for observation.

### Create a breakout room

1. Click **breakout rooms**.



2. Select the number of rooms you would like to create. The maximum is 50 rooms. Select "**manually**" for how you would like to assign your participants to those rooms. This lets you choose which participants you would like in each room.
3. Click **Create breakout rooms**.

Assign 1 participants into  Rooms:  
 Automatically  Manually

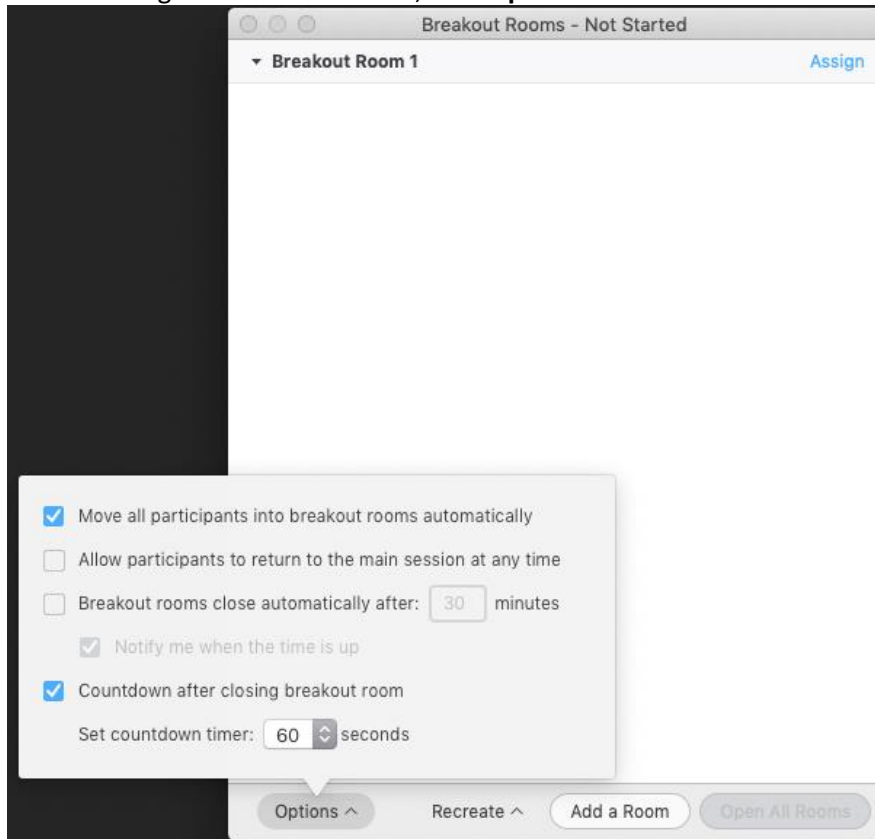
1 participants per room

Create 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.
5. The Zoom host should be sure to add a breakout room for his or her own meeting.

## Options for breakout rooms

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

- This is a personal preference. Leaving it unchecked just gives the participants slightly more time and a choice to join before being moved.

**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.

- Selecting this option allows the site visitors to return to the main meeting to talk together if needed.
- If the Zoom host is using the main session for his or her own meeting, you may not want to select this option as this may disrupt any meetings that the Zoom host is having at that time.

**Breakout rooms close automatically after x minutes:** If this option is checked, the breakout rooms will automatically end after the configured time.

- This is helpful to maintain your site visit schedule.

**Notify me when the time is up:** If this option is checked, the host will be notified when the breakout room time is up.

- This is also a personal preference if you'd like a heads-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.

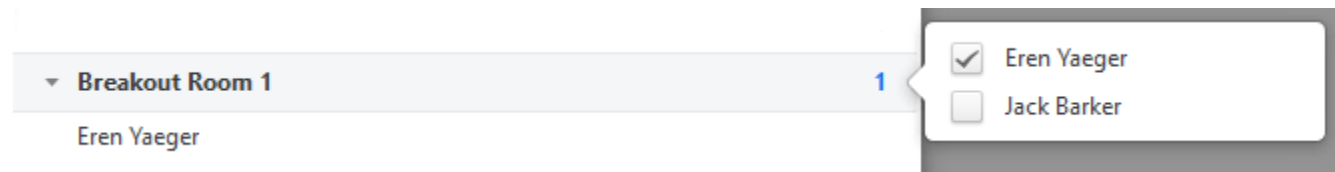
- This is a courtesy that is helpful. Note that the countdown clock is additional time to the meeting duration time (if a time is assigned).

### 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.



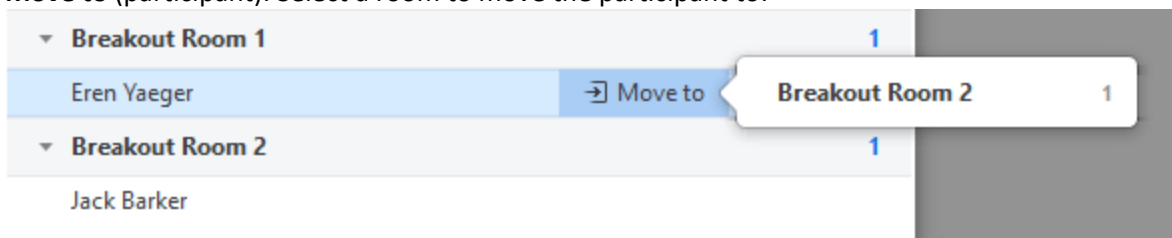
Once a participant has been assigned (manually or automatically), the number of participants will show in place of the **Assign** button.



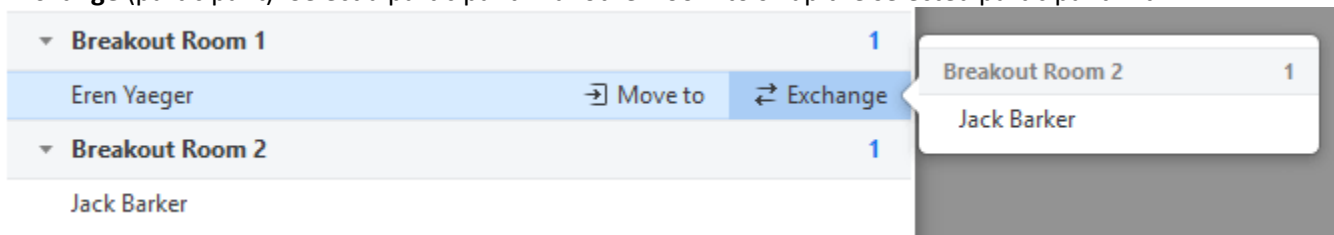
### Preparing breakout rooms

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.

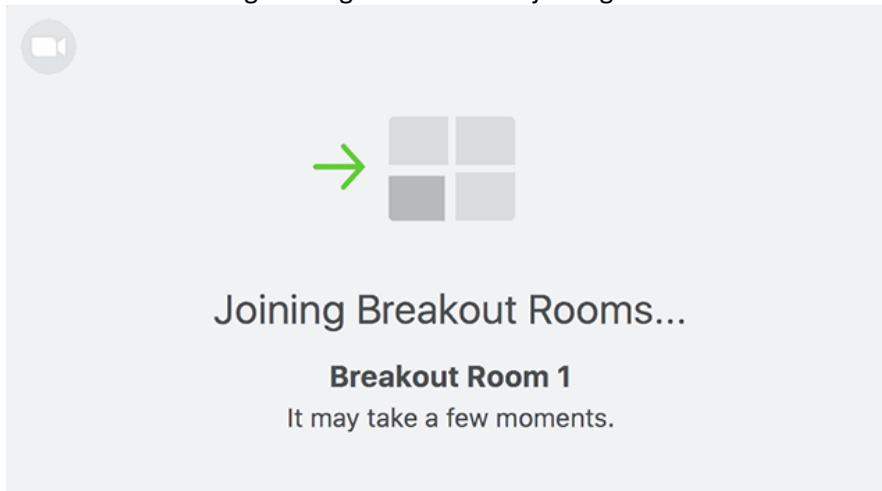


- **Exchange** (participant): Select a participant in another room to swap the selected participant with.





- **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. The participants (and the host when manually joining a room) will see the following message shown when joining the breakout room.



### **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.

▼ Breakout Room 1 [Join](#)

- Eren Yaeger

▼ Breakout Room 2 [Join](#)

- Jack Barker

Broadcast a message to all ^

Close All Rooms

- **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.

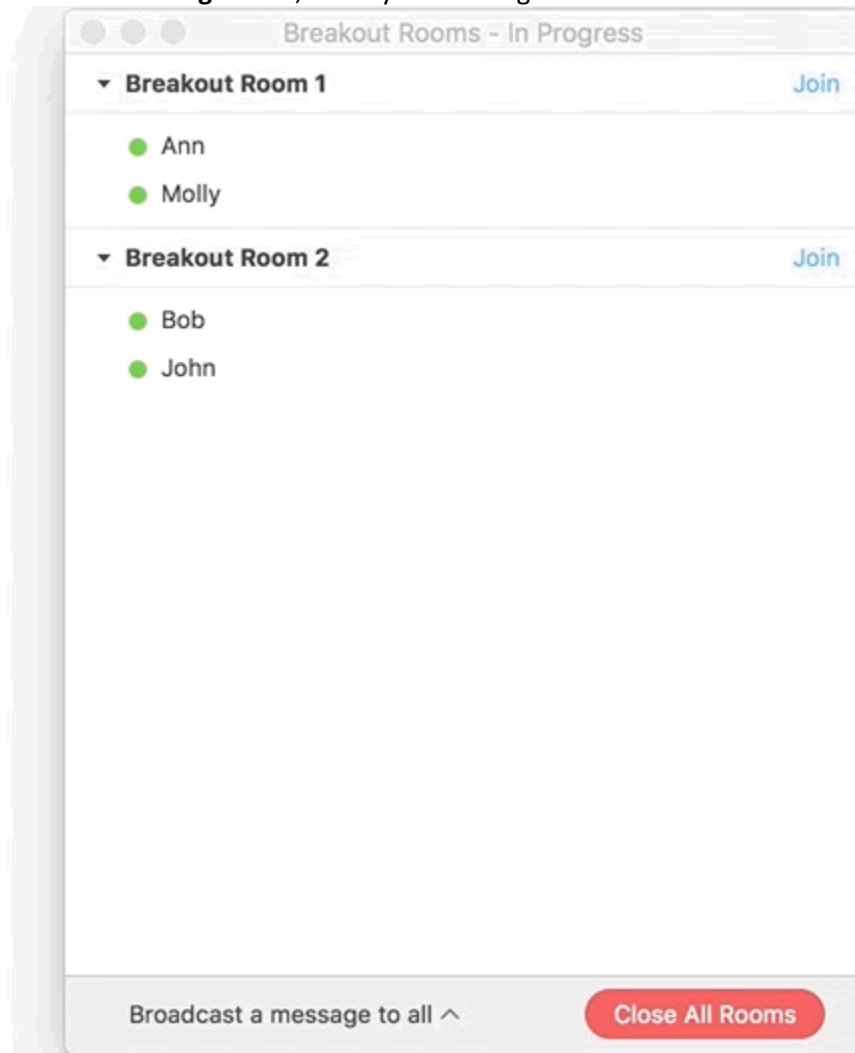
### Broadcasting a message to all breakout rooms

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.

#### Notes and tips for the breakout rooms:

- If anyone loses connection or leaves the meeting, they'll have to be admitted from the Waiting Room and reassigned to a breakout room again.
- **Site Visitors should not disconnect from the Zoom meeting during breaks to avoid having to be re-admitted to the meeting. Instead, just turn off audio and video during breaks.**

- Within the breakout room the chat function is just for that breakout meeting. Chatting with “everyone” in the breakout room is only for that room, not the main meeting or other break out rooms.

For more information on managing breakout rooms:

<https://support.zoom.us/hc/en-us/articles/206476313-Managing-breakout-rooms>

## Troubleshooting

### Audio Echo or Feedback in a Meeting

If you are hearing feedback or echoes in your meeting, that means there is a device in the meeting that is channeling your audio back.

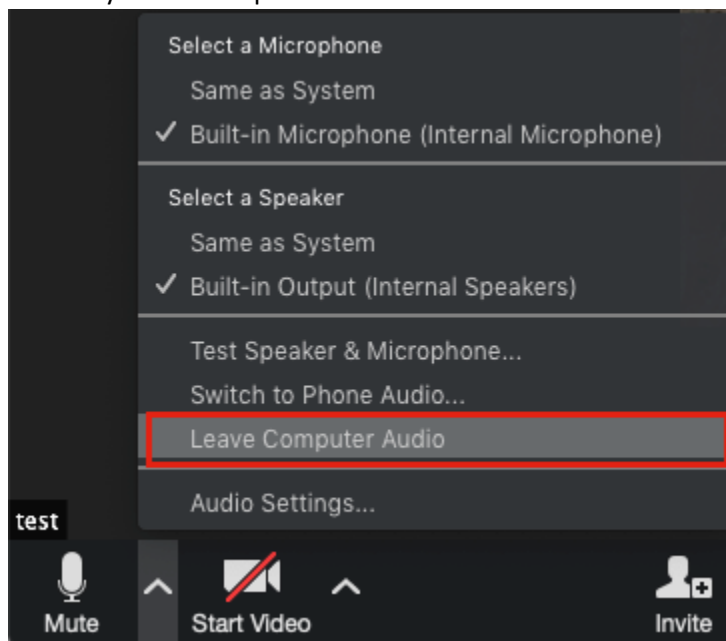
**There are 3 main causes of audio echo or feedback in a Zoom meeting:**

1. A participant has both the computer and telephone audio active
2. The speakers on participants' computers or telephones are too close to each other
3. There are multiple computers with active audio in the same conference room

**Case 1: A participant has both the computer and telephone audio active**

If you join from a computer and call in from the telephone, please make sure you either:

- Enter your *participant ID* when calling in, or enter *#participant ID#* when already in the call
- Or, use the Audio Settings caret to the right of the Mute/Unmute button to manually Leave Computer Audio.



### **Case 2: Participants with computer or telephone speakers that are too close to each other**

If another participant is too close to you, and both of you have speakers on, either hang up one of the telephone connections or select Leave audio conference on one of the computers.

### **Case 3: Multiple computers with active audio in the same conference room**

If you are in a conference room with multiple devices, disconnect your computer audio from the other devices. Muting your speaker is not enough.

- On a PC or Mac: Select Audio Options > Leave Computer Audio
- On an Android or iPhone: Select Disconnect

### **To figure out which attendee is causing the echo:**

1. Choose one way of muting all attendees:
  - a. The host can mute the attendees one at a time
  - b. The host can mute all of the attendees at once
  - c. Attendees can mute themselves
2. Un-mute one attendee at a time.

More information and detailed troubleshooting steps for audio echo issues in Zoom are available in the [Zoom Help Center](#).

### **Zoom Performance and Unstable Internet Connections**

Fluctuations in internet service can cause this message, sometimes accompanied with stuttering video or audio issues. Zoom prioritizes audio continuity so that audio should continue even if video deteriorates.

If you see this message and are transmitting your camera, try turning off your video. The bandwidth freed up by doing this may help improve the quality of remaining meeting components such as audio and screen sharing.

For more tips about things to try when you need to reduce your bandwidth or data usage, see below.

#### **Audio Issues**

To improve audio quality, use a wired network connection, rather than a Wi-Fi connection. This will generally provide a more consistent and higher quality network connection.

During the Zoom meeting, do not run any network-intensive applications on your computer, such as Internet radio or streaming video, or run significant uploads or downloads that might compete with your Zoom audio.

Connect any external audio devices such as a USB microphone and headset before you start your meeting. If you connect devices after the meeting had started, Zoom may not detect them.

#### **Reducing Zoom Data and Bandwidth Use**

If you are getting Zoom's "*your connection is unstable*" warning, there are several strategies you can try to reduce your bandwidth and data usage during Zoom meetings.

- **Leave video off when you don't need it.** For meetings where seeing each other isn't that important, turning your camera off is the easiest way to reduce the amount of data going in and out of your computer. You can adjust your settings, so you always join meetings with your camera off, and choose to have attendees' cameras off for meetings you set up.
- **Turn off HD video.** Providing video in HD resolution requires significantly more data, so consider turning it off when the quality of the image you're sending isn't critical.
  - To turn off HD in your Zoom client:
    - In your desktop Zoom client, click Settings (the gear icon).
    - Click Video in the left-hand menu.
    - In the My Video section, uncheck the box beside Enable HD if it is checked.
- **When you do screen share, only share as long as absolutely necessary.** Be sure to stop screen sharing when you no longer need to show your screen. Also, request that other users turn off their screen sharing when they are done with their example. Use online collaborative documents rather than screen sharing.
- **Mute your audio when not speaking.** While it doesn't use as much bandwidth as your video, you can also reduce your bandwidth somewhat by muting your audio when you're not speaking. Use the Mute button in the bottom left corner of the Zoom screen to toggle your audio off and on.
- **You might also consider using a phone call** to connect to Zoom meeting audio instead of using computer audio within the meeting. The phone numbers to connect to a Zoom session are usually included in the invitation you receive from the host under the heading "Dial by your location."
- **Limit high-bandwidth activities by others at your location.** Other people using the Internet from your remote location will affect the bandwidth available to your Zoom session. Avoid having others stream video or music, play online games, or upload and download large files, as all of these activities can noticeably impact your Zoom performance.
- **Avoid running other data-intensive applications during Zoom sessions.** Improve your overall Zoom client performance by not running other applications during meetings that might also be using a large share of your bandwidth. Examples of data-intensive programs might include streaming video or music sites, or other websites with dynamic content. You can always check your network usage using Activity Monitor on the Mac or Task Manager in Windows to pinpoint which programs are data hogs.

## Webcam or Audio Not Working

When you join a call, Zoom will prompt you with an option to 'Join with Video' before entering the meeting. Always click this button, or else you will enter the call without your camera feed.



If your web camera isn't showing up, the first thing to do is check to make sure all other programs that use the webcam are closed. Zoom won't be able to use the camera if you've already given access to it in a different application.

If your webcam or audio still isn't working, you can test your audio and video in Zoom by [clicking this link](#).

Sometimes the problem might not be Zoom at all. If you're on a [Windows 10](#) or MacOS device, the webcam might be blocked. You can correct this by checking your app permissions to make sure the Zoom app or your web browser can use your webcam. On the web specifically, you also can check this setting by restarting your call and making sure you pressed Allow when prompted about the camera and microphone access.

On Windows, you can check to see if your webcam is blocked by searching for Webcam in the Start Menu and selecting Choose which apps can use camera from the menu. Scroll down and you'll see the list of applications that are allowed to use your webcam. Make sure the box for your web browser or Zoom is ticked. In the same way, you also can search for Microphone and choose Microphone privacy settings to do the same.

On MacOS, you'll need to click Security and Privacy in the System Settings, click the lock, and enter your password to make changes. You can then click Camera from the sidebar, and make sure your web browser and Zoom are checked. You'll also want to make sure the box for the microphone is checked, too.

## Helpful Zoom References

<https://support.zoom.us/hc/en-us/articles/200941109-Attendee-controls-in-a-meeting>