Boston Children's Hospital
Medical Education

Zoom Teaching Session Set-up Guide

Overview	This document reviews key Zoom features you might want to use for a teaching sessions, and how to enable them. Zoom has many features and optional settings that are often not easy to find. Taking the time to familiarize yourself with the Zoom environment, features, and settings will enable you to maximize your virtual teaching experience, and your students virtual learning experience. Support resources: Zoom Help Center Help.Desk@childrens.harvard.edu BCH Department of Education
Contents	1. Plan 2. Choose your session type 3a. Session set-up: meeting 3b. Session set-up: webinar 4. Invite attendees 5. Rehearse 6. Conduct event 7. Evaluate
Step 1: Plan	Your teaching objectives and parameters will determine the need for enabling or disabling certain Zoom features. Key considerations: • Teaching methods o Lecture o Panel discussion o Large group discussion o Small group work o Role play o Q & A o Polling o Brainstorming o Games o Etc… • Audience o is the size conducive to group activities? o are there attendees external to bch? may imply requirements for access to content, registration, and credit • Session participants o host, co-host, presenters, moderator, technical support o level of technical facility/comfort • Post-session recording for on-demand access? o recording to the cloud requires permission, via form at: Web2/ > Quick Links > Zoom > Cloud Recording Request Form o how will people access the session recording link?

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	• Security
	  o No recording of PHI, display or discussion
	• Supporting media
	  o slides, video, documents, etc.
	• Will credit be awarded?
	• Will attendance be tracked?

Step 2: Choose your Session Type	**Note:** Webinar capability requires an add-on to the standard BCH Zoom account, which may be requested via helpdesk. See Comparison of meetings and webinars on Zoom support for more detail. **Zoom Meeting** For sessions with up to a hundred people, attendees can • collaborate with each other spontaneously • be segmented into smaller working groups with breakout rooms • mute and unmute their own audio and video **Zoom Webinar** Webinars are intended for events with larger audiences and lecture-based presentations. A webinar is intentionally NOT a collaborative experience, so it has more options for limiting attendee interaction. For example, webinar attendees • cannot unmute themselves, but hosts can unmute attendees • can chat only with hosts and panelists, or with all attendees, depending on set-up permissions • can submit questions to host and panelists • can answer poll questions **Note:** webinars have two distinct links, one for host/panelists and on for attendees. Be sure to send the right invitation to the right role.
Step 3a. Meeting set-up:	**If you want to…** → **Then…** Track and report on attendance → Require registration, with these options: • Auto or manual approval • Email host when attendee registers • Allow attendance from multiple devices • Customize registration form questions

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		Select options after setting up and saving the meeting. Scroll down the bottom of the page and select Registration tab, select edit at the far right of the screen.
	Restrict access to the meeting	Require a password -- mandatory for the display or discussion of PHI
	Restrict access to the meeting	Limit meeting access to authenticated users, under advanced options in desktop app, or via the web portal under meeting options. Only those who have zoom accounts will be able to join the meeting.
	Allow attendees to join webinar by phone	Select **Both** for audio option
	Prevent attendees from joining meeting before host	select option when scheduling meeting, under advanced options in desktop app, or web portal
	Mute participants when they enter the meeting (note: participants can unmute themselves)	select option when scheduling meeting, under advanced options in desktop app, or via the web portal
	Require host to approve attendees before they can enter the meeting	Place attendees in a "waiting room," under advanced options in desktop app, or via the web portal
	Pre-assign attendees to breakout room when setting up a meeting	Set up breakout rooms via the web portal option. Note: you can only pre-assign participants that have a Zoom account. Up to 200 participants can be pre-assigned to breakout rooms.
	Record meeting automatically upon meeting start	Record to local hard drive, or -- with permission -- to Zoom cloud. The cloud recording permission is available at: Web2/ > Quick Links > Zoom > Cloud Recording Request Form

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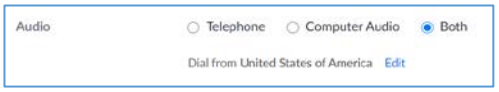
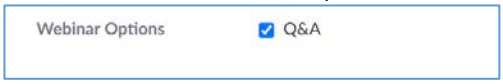
	Enable some else to be able to start and manage the meeting	Set up an alternative host
	Poll or survey attendees during the meeting	Set up a poll - requires setup via the web portal. After setting up the meeting, scroll down to the bottom the meeting page to access polling option.

Step 3b. Session Set-up: Webinar

Note: Webinars can only be set up via the web portal

If you want to…	**Then…**
Track and report on attendees	Require registration, with these options: • Auto or manual approval • Email host with registration • Allow attendance from multiple devices • Customize registration form After setting up and saving the webinar, open it to edit. Scroll down the bottom of the page and select the Invitations tab. Find 'Approval' and select edit at the far right of the screen.
Require a password, mandatory display or discussion of PHI	Select option
Start Webinar with host or panelist video on or off	Select desired option
Allow attendees to join webinar by phone	Select Both for audio option 
Include a dedicated window for viewing questions submitted by attendees	Enable Q &A under webinar options.  To edit Q & A options, scroll down to the bottom of the webinar page after initial setup

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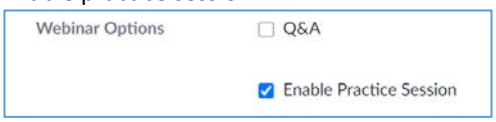
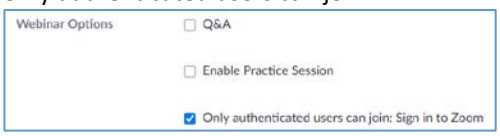
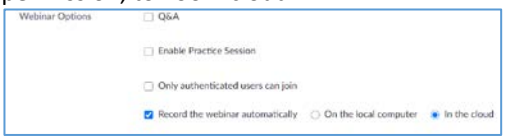
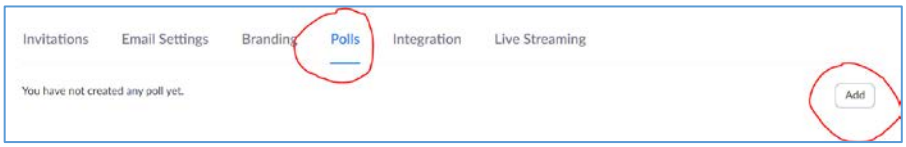
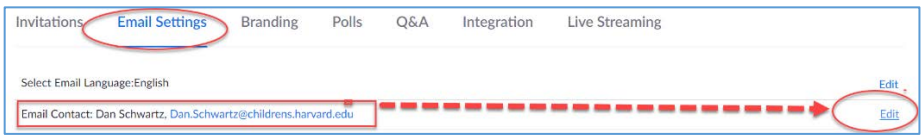
Talk to your co-hosts or panelists in the webinar before starting to broadcast to your audience	Enable practice session  * be sure to start broadcasting at the established time
Restrict webinar access to zoom account holders	Only authenticated users can join 
Record the webinar automatically upon start	Select option to record to local hard drive, or, with permission, to Zoom cloud. 
Enable someone else to be able to start and manage the meeting	Add alternative host(s)
Poll or survey attendees during the webcast	Requires setup via the web portal. Save the initial meeting setup, then scroll down to the bottom of the meeting page, find the 'Add' button at the far right of the screen under Poll 
Customize the webinar contact email address	The webinar contact email address is included in the confirmation email attendees receive upon registering. 
Customize the confirmation email attendees get when they	After completing initial setup of the webinar, scroll down to the bottom of the setup page for the webinar and select the 'Email Settings' tab.

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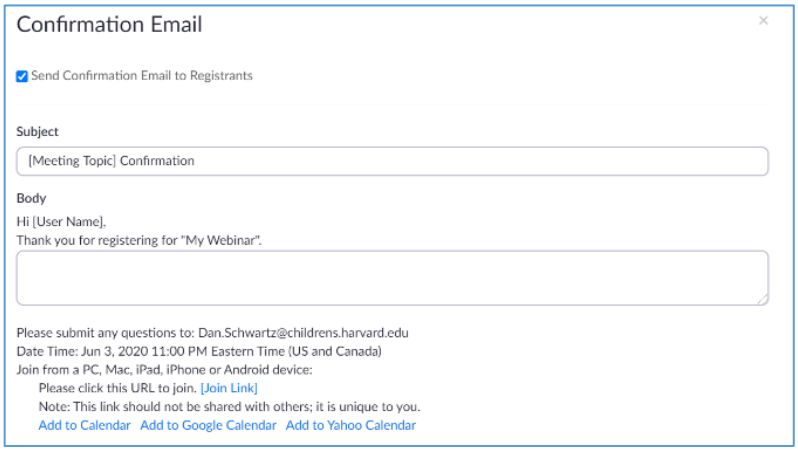
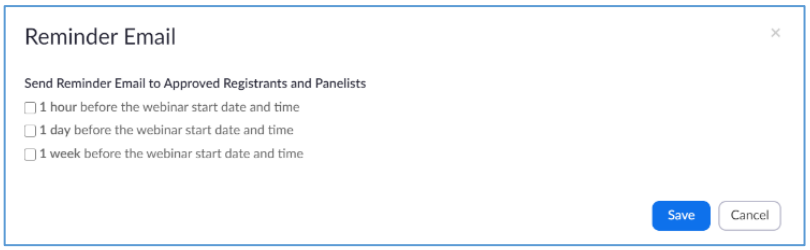
register, and email notification settings



Set an automatic reminder email to your panelists

After completing initial setup of the webinar, scroll down to the bottom of the setup page for the webinar and select the 'Email Settings' tab. Select 'Edit' to the right of "No reminder email to Attendees and Panelists." Tip: send your panelists a reminder at least an hour before the event, so that they have the link at the top of their email inbox.



Send an email invitation to your panelists manually

After completing initial setup of the webinar, scroll down to the bottom of the setup page for the webinar and select the 'Invitations tab.' Select the 'Edit' option to the right of the 'Invite Panelists', which will send the invitation with webinar link.

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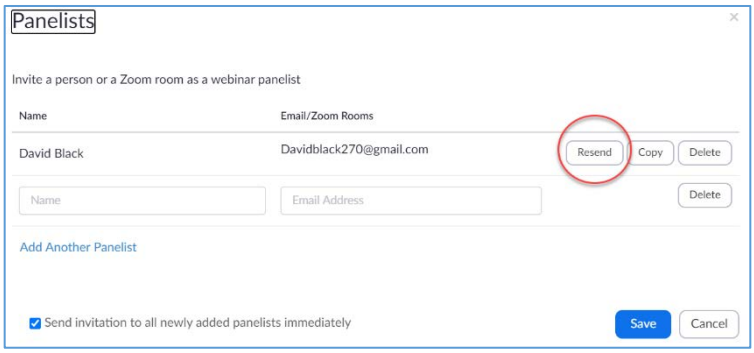
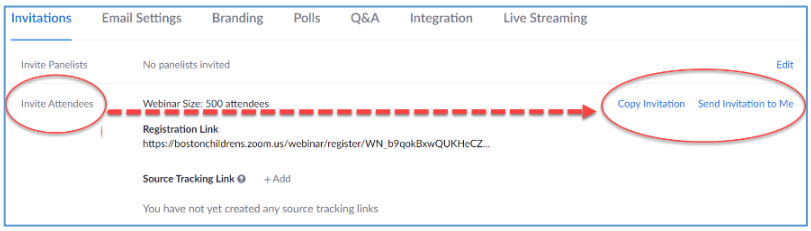
Resend panelist invitation with webinar link.

At any time, you can resend the invitation to co-hosts and panelist. Select 'Edit' under the Invitation tab.



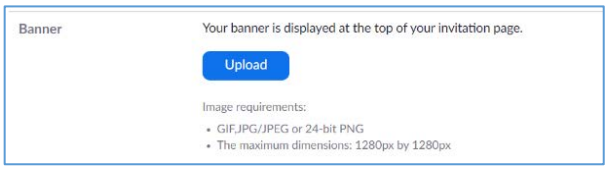
Send an email invitation to your attendees

After completing initial setup of the webinar, scroll down to the bottom of the setup page for the webinar and select the 'Invitations tab.' Select one of the email options to right of 'Invite Attendees'. Tip: send the email to yourself or a colleague first to make test.



If you want to change the title and add a banner to your registration page

After completing initial setup of the webinar, scroll down to the bottom of the setup page for the webinar and select the 'Branding' tab



If you want to add information about the webinar speakers

After completing initial setup of the webinar, scroll down to the bottom of the setup page for the webinar and select the 'Branding' tab

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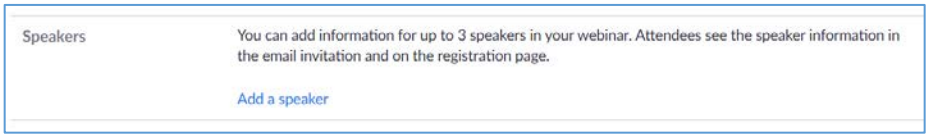
<table>
<tr><td></td><td> 
</td></tr>
<tr><td>Step 4.
Invite Attendees</td><td>Meeting invitations are straight forward, particularly if sent as an outlook meeting.

Webinar invitations have more to manage because they have two different links: one for webinar hosts, co-hosts, and panelists, and one for attendees. Be sure each participant type has the correct invitation with the correct link.

Tip: use reminders when setting up a webinar invitation to automatically send reminder emails to panelist and registrants.</td></tr>
<tr><td>Step 5.
Rehearse</td><td>Rehearsing you Zoom session is important, particularly if your session will involve multiple speakers/panelist, or interaction among attendees with polling, breakout rooms, or other features.

The goal of a rehearsal is not to practice content delivery. The goal is to choreograph the session, and make sure all session hosts, co-hosts, presenters, and panelists are comfortable with manipulating any Zoom features they will need to use. If possible, it is a good idea to test the entire process, from session setup through completion.</td></tr>
<tr><td>Step 6.
Conduct event</td><td><table>
<tr><th>If you want to…</th><th>Then…</th></tr>
<tr><td>Recognize individual attendees for questions</td><td>Ask attendees to use the raise hand icon

Meeting Webinar</td></tr>
<tr><td>Take the pulse of your meeting participants, e.g., should you go faster/slower</td><td>Meeting only: prompt attendees to use non-verbal feedback icons</td></tr>
<tr><td>Take questions from attendees</td><td>Webinar only: prompt attendees to use the Q & A tool (webinar only)</td></tr>
<tr><td>Segment attendees into multiple smaller groups for discussion or group work</td><td>Meeting only: use breakout rooms.
Note: only hosts can control breakout rooms in a meeting.</td></tr>
</table></td></tr>
</table>

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	Present slides, web pages, applications, or play a video for a teaching session	Select Screen Share from the Zoom toolbar, then select to share a specific application, or your entire desktop. (**NOTE:** if you share your entire desktop, any application you have open is visible, including email.)
	Have participants comment or brainstorm in real-time, and document their input for the group	Use the text tool in the Zoom whiteboard, or screens share an editable document.
	Annotate an image, document, slide, etc.	Select a screen to share, then select the annotation option from the Zoom tool bar.
	Draw a diagram or illustration in real-time, using your mouse, trackpad, or drawing tablet.	Select the whiteboard option under Screen Share (rehearsal highly recommended, drawing with a mouse is difficult)
	Play a video or audio clip during a session	With the video or audio file open, select Screen Share from the Zoom toolbar. **BE SHURE TO CHECK** 'Share Computer Sound' in the bottom left corner of the screen share window. Select and start the video or audio.
	Survey participants during a teaching session	Use Zoom's polling feature for simple multiple choice questions Meeting Webinar For greater variety of question types, screen share another audience response tool like https://www.polleverywhere.com/

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Step 7. Evaluate	If your Zoom meeting has registration or polling enabled, you can generate a registration or polling report for further analysis. The registration report contains the following information of registered participants: • First and last name • Email address • Date and time of registration • Responses to custom questions • Approval status The polling report contains the following information of participants that answered a poll question: • Username and email address • Date and time they submitted their answer • The poll question and the participant's answer