The University of Arizona HealthCare Partnership

Nicotine Dependence Treatment
Continuing Education/Certification Programs

Facilitator Guide

Hosting an Instructor-Led Virtual Program

THE UNIVERSITY OF ARIZONA | HealthCare PARTNERSHIP
Transforming Lives with Evidence-Based Practices

Welcome!

We look forward to your participation in a University of Arizona HealthCare Partnership Nicotine Dependence Treatment live, Instructor-led, Virtual Certification program via Zoom. The program is highly interactive, utilizing hard copy educational resources and small group virtual activity. This guide has been developed to enhance your teaching ⇔ learning experience. If at any time prior to or during the virtual program you need assistance, contact Renee Sayre at the UA HealthCare Partnership at 520.626.9344 or sayrer@arizona.edu. We hope this guide will be helpful toward immersing yourself in the teaching ⇔ learning experience!

Zoom Navigator Services to Support your Programs

The HealthCare Partnership (HCP) offers a new service to support virtual program activities. Cynthia (Cyd) Tokar, MA, MFA returns to the HCP team as an Instructional Specialist, offering technical assistance as a Navigator for Zoom presentations. Ms. Tokar will preplan your virtual programs with you as well as support the live teaching ⇔ learning activities. The skills of a professional Navigator enhances the potential success of Certification/Continuing Education virtual programs. To secure Navigator services and/or for more information, contact Renee Sayre at sayrer@arizona.edu or via phone 520.626.9344.

The Instructor-Led Virtual Programs for Nicotine Dependence Treatment offered through the HealthCare Partnership can be facilitated through the online Zoom platform. If your organization already has an institutional account, Instructors can set up their own meeting, breakout groups, and manage participants. If you do not have access to Zoom, please contact the HealthCare Partnership to facilitate this portion.
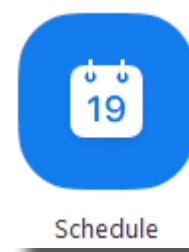
Creating a Meeting

Before creating a Zoom meeting on a computer or mobile device, it is best to download the Zoom client software for a computer, or the Zoom app for a mobile device, from the Zoom Download Center at:

https://zoom.us/download

Scheduling a Meeting

Open your Zoom client and sign in to Zoom. Click on the **Schedule** icon.

This will open the scheduler window.

Schedule

Select your meeting settings:

- Topic: Enter a topic or name for your meeting.
- Date & Time:
    ◊ Start: Choose a date and time for your meeting. You can *start* your meeting at any time before the scheduled time. You can also manually enter any time. For example, you can enter 15 in the minutes field to schedule a time with a 15-minute increment.

    ◊ Time Zone: By default, Zoom will use your computer's time zone. Click the drop-down menu to select a different time zone.

    ◊ Recurring Meeting: Choose if you would like a recurring meeting (the meeting ID will remain the same for each session).

- Meeting ID:
    ◊ Generate Automatically: Generate a random, unique **meeting ID**. This ensures that the number will be unique to the meeting you are creating, and is recommended.

- Security:
    ◊ Passcode: Having a passcode is a good way to make sure that folks who have not registered are not part of the group. Joining participants will be required to input this before joining your scheduled meeting. Zoom will create for you a unique passcode for the meeting that will be included with the Meeting ID when you invite participants.

- Waiting Room: Enable Waiting Room for the meeting if you want to "admit" participants to the virtual program at a specific time or in a certain order. This IS recommended for HealthCare Partnership programs so that instructional staff can ensure everything is ready prior to beginning the program, or have some time to meet together before participants join.
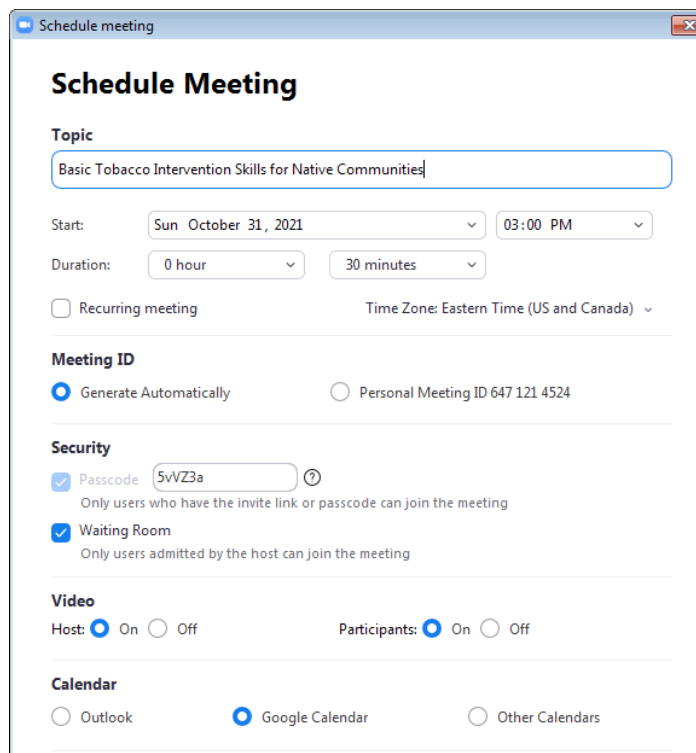
    ◊ Participants will enter a virtual "waiting room" until the facilitator is ready to begin the program. Participants will see a message when they join the meeting telling them to wait to be admitted to the meeting.
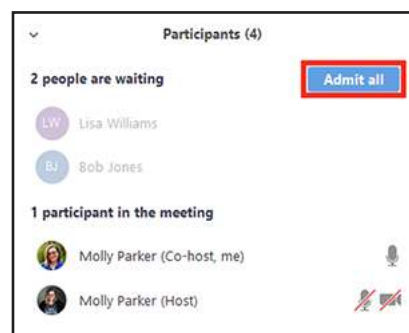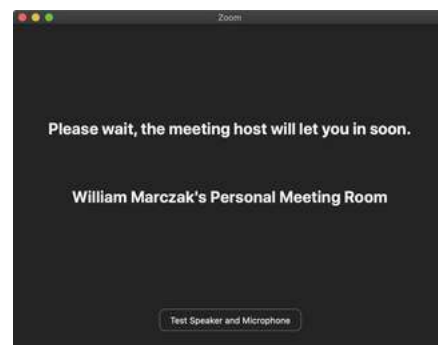
    ◊ Facilitators can admit participants as they enter the waiting room, or can admit all waiting participants at once. Note: if participants enter the waiting room after you've already admitted some folks, you will receive a notification on your screen. You can also click on **Manage Participants** to see if anyone is in the Waiting Room.
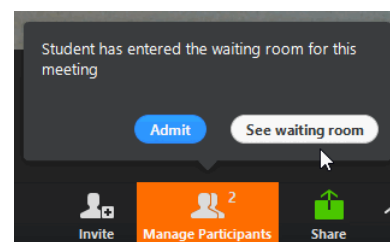
- ◊ Only authenticated users can join: This option restricts access to the meeting so that only users who are signed in to a Zoom account can join. Depending on the technology skill level or computer access of your participants, you may ***not*** want to require users to sign into Zoom with their own account before joining the meeting. Therefore, it is recommended that this feature is NOT checked.
- Encryption: Unless instructed otherwise by your organization, choose the standard Enhanced encryption (encryption keys stored in the cloud) for your meeting.
- Video:
  - ◊ Host: Choose if you would like the host's video to default to on or off when joining the meeting. Even if you choose off, the host will have the option to start their video when they are ready. In order to encourage maximum participation, it is recommended that Host and all participants start the program with **video ON**.
  - ◊ Participants: Choose if you would like the participants' videos on or off when joining the meeting. Even if you choose off, participants will have the option to start their video on their own. In order to encourage maximum participation, it is recommended that Host and all participants start the program with **video ON**.
- Audio: Allow users to call in using Telephone only, Computer Audio only, Both, or 3rd Party Audio. It is recommended that you select Both for this virtual program in case some participants do not have access to computer audio.
- Click **Save** to finish, and open the selected calendar service to add the meeting.

More advanced options are available - please reach out to the HealthCare Partnership for more information, or review the tutorials available from Zoom at their website.

Scheduled meetings can be started at any time before the scheduled time by the meeting host. You may choose to meet with your training team for an hour or so before the scheduled program to coordinate assignments for the program, review any audio/visual requirements, test equipment, etc.

Managing Virtual Program Registration

Hosts of meetings and webinars with registration can view and manage their registrants before the session is scheduled to start, allowing them to ensure unregistered guests or "hackers" are not allowed in, be aware of how many will potentially join, and prepare for the audience that will be awaiting them. They can approve or deny registrants when using manual approval, rescind approved registrations, or even resend confirmation emails.
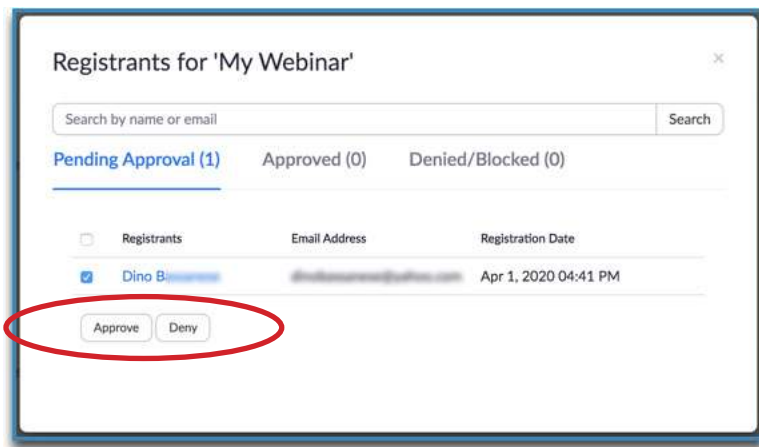

How to manually approve or deny registrants

When using manual approval of registrants, the host will need to approve or deny each registrant.

- ❑ Sign in to the Zoom web portal. In the navigation menu, click the **Meetings** or **Webinars** page. Find the scheduled session you wish to edit and click on the topic.
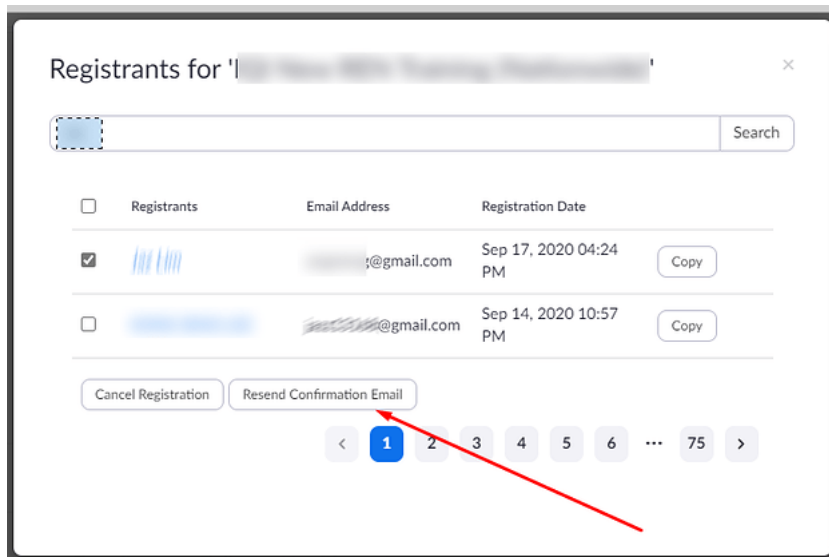
❑ Click on the **Invitations** tab (for Webinars) or the Registration tab (for Meetings).

❑ Find the Manage Attendees (Webinars) or Manage Registrants (Meetings) section and click **Edit** or **View** on the right-hand side. This will open the list of registrants for this meeting or webinar. You can view three categories: Pending Approval, Approved, Denied/Blocked.

● Under the Pending Approval tab, you can view the list of unapproved registrants, click on the registrants name to view their registration details, and **Approve** or **Deny** their registration. (Optional: Approve or deny registrants in bulk by selecting multiple registrants and clicking the Approve or Deny buttons.)

Note: If a registrant is denied, you will be able to send a custom message to them. Enter the custom message and click **Send**. NOTE: Registrants **cannot be deleted**, only approved or denied. If a participant registered with the incorrect information, they would need to register again with the correct info.

How to resend and access confirmation emails

After a registrant has been approved, Zoom will send them a confirmation email (unless disabled by the host) with their unique join link and other relevant information for joining the event. If someone has not received their email, the host can easily access that email, either to copy the information and send it with another service, or to resend that email from Zoom.

❑ Sign in to the Zoom web portal.

❑ In the navigation menu, click the **Meetings** or **Webinars** page.

❑ Find the scheduled session you wish to edit and click on the topic.

❑ Click on the **Invitations** tab (for Webinars) or the **Registration** tab (for Meetings).

❑ Find the Manage Attendees (Webinars) or Manage Registrants (Meetings) section and click **Edit** or **View** on the right-hand side. This will open the list of registrants for this meeting or webinar.

❑ Click on the **Approved** tab (*this may not be visible if using automatic approval*) and find the name of the registrant. (*Optional*: Click **Copy** to view the registrant's confirmation email and copy as much as needed of that email to send to them with other services.)

❑ Click on their name and then the **Resend Confirmation Email** button to send the confirmation email to the registrant again. (*Optional*: Resend confirmation emails in bulk by selecting multiple registrants and clicking the **Resend Confirmation Email** button.)

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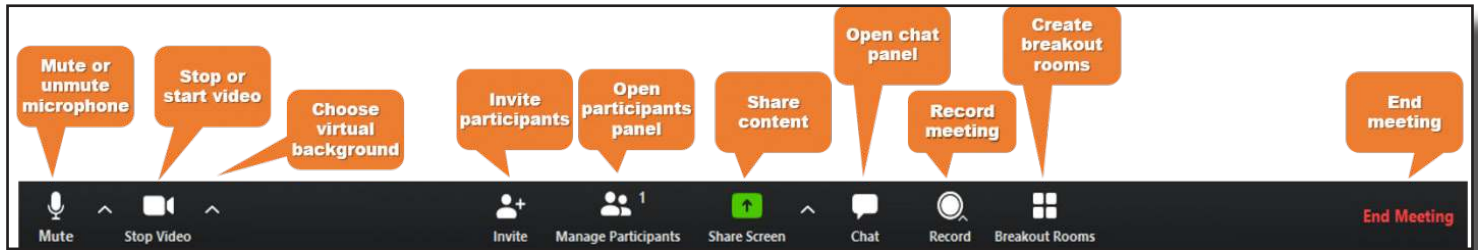
There are multiple roles available for a meeting: host, co-host, alternative hosts, and participants. The role that you have in a meeting is designated by the host.

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

Co-hosts do not have access to the following controls as they are only available as host controls in a meeting:

- Start closed captioning and assign someone or a third-party to provide closed captioning
- Start live streaming
- End meeting for all participants
- Make another participant a co-host
- Start waiting room (co-hosts can place participants in waiting room or admit/remove participants from the waiting room)
- Co-hosts also cannot start a meeting. If a host needs someone else to be able to start the meeting, they can assign an alternative host.

Prerequisites for using host or co-host controls

- ❏ Host permission in the meeting, or co-host permission (set by the host)
- ❏ Zoom desktop client for macOS, PC, Chrome OS, or Linux
- ❏ Zoom mobile app for iOS or Android
- ❏ Zoom web client

The host controls will appear at the bottom of your screen if you are not currently sharing your screen.

- Join Audio or Unmute / Mute: This allows you to connect to the meeting's audio, then once connected, mute or unmute your microphone.
  - ◊ Audio controls (click ^ next to Mute/Unmute): The audio controls allow you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio options in the Zoom settings.

- Start Video / Stop Video: This allows you to start or stop your own video camera.
  - ◊ Video controls (click ^ next to Start/Stop Video): If you have multiple cameras on your computer, you can select which Zoom is using, access the full video controls, and select a Virtual Background.

- Security: Access in-meeting security options.
- Participants: Opens the window to manage participants, view aggregate nonverbal feedback, and invite others to join the meeting.
- Chat: Access the chat window to chat with the participants, either individually or to the whole group.
- Share Screen: Start sharing your screen. You will be able to select the desktop or application you want to share. When you are screen sharing, the controls will appear at the top of your screen, but you can drag it to another location.
  - ◊ Share Screen controls (click ^ next to Share Screen): Select who can share in your meeting and if you want only the host or any participant to be able to start a new share when someone is sharing.

- Polling: Allows you to create, edit, and launch your polls. The options to create or launch polls will open up the Zoom web portal in your default browser. When the poll closes, you can view the results and can download the full poll report. If a poll has already been created, both host and co-host can launch the poll, but only the host can edit or add polls to the meeting.

- Record: Start or stop a cloud or local recording.
- Closed Caption /Live Transcript (*only available to the host*): If you have enabled closed captioning or live transcription for your account, click here to access the closed caption options.
- Reactions: Meeting reactions, nonverbal feedback, and Raise Hand allow you to communicate issues or feedback to the host or presenter without disrupting the meeting. These reactions are shown on your video panel and next to your name on the participants panel.

- Breakout Rooms: Start breakout rooms.
- End (only available to the host): Display the following two options:
  - ◊ End Meeting for All: End the meeting for yourself and all participants.
  - ◊ Leave Meeting: Leave the meeting. You will be prompted to assign a host so that the meeting can continue if necessary.
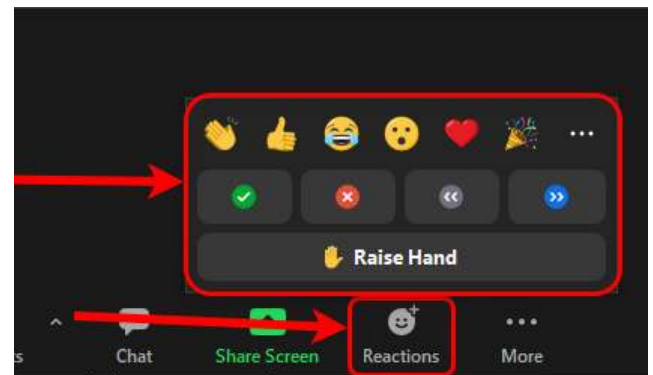
Breakout Rooms

Using breakout rooms in our virtual programs is a great way to replicate the small group learning experience, share perspectives on a topic, and achieve greater participation outcomes, making the virtual experience more similar to our in-person programs. Facilitators use small groups for less intimidating participation opportunities, to solve tech issues one-on-one without delaying learning for the rest of the group, for side conversations that need more interaction than a chat can provide, and for small-group return demonstrations to fulfill certification requirements.

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

User settings

To enable the breakout room feature:

- Sign in to the Zoom web portal.
- In the navigation menu, click Settings.
- Navigate to the Breakout Room option on the Meeting tab and verify that the setting is enabled.

(Optional: Click the checkbox to allow meeting hosts to pre-assign participants to breakout rooms.)

If the setting is disabled, click the toggle to enable it. If a verification dialog displays, choose Turn On to verify the change.
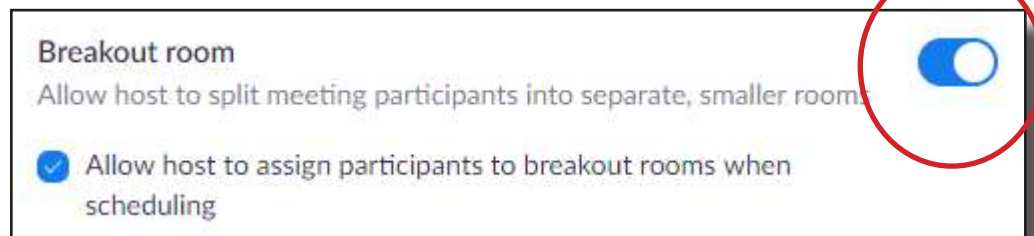
Note: If the option is grayed out, it has been locked at either the Group or Account level, and you will need to contact your Zoom administrator.

Using breakout rooms
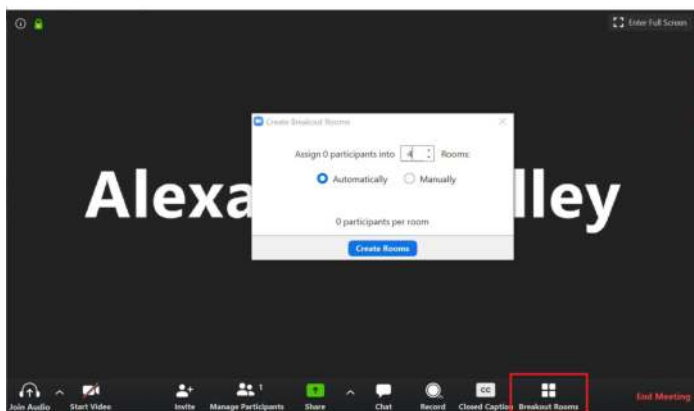

After enabling breakout rooms, you can do the following:

- Participate in breakout rooms (participants)
- Manage breakout rooms (host)
- Pre-assign participants to breakout rooms (host)

Creating breakout rooms

If you want a specific dynamic in your breakout sessions, you can also pre-assign participants to breakout rooms when you schedule the meeting instead of managing them during the meeting.

- Start an instant or scheduled meeting.
- 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 randomly split your participants up evenly into each of the rooms.
  ◊ Manually: Choose which participants you would like in each room.
- Let participants choose room: Participants can select and enter rooms on their own.
- Click **Create Breakout Rooms**.
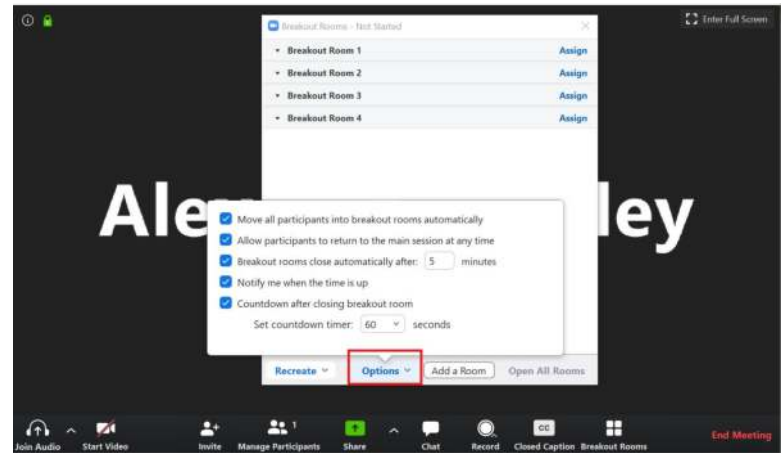
Your rooms will be created, but will not start automatically. You can manage the rooms prior to starting them by following the instructions below.

Options for breakout rooms

After creating the breakout rooms, click **Options** (on Windows) or the **gear icon** (on macOS) to view additional breakout rooms options.

Check any options that you would like to use for your breakout rooms.

- Allow participants to choose room: Participants can select and enter rooms on their own once rooms are launched.
- 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 or co-host to end the breakout rooms.
- Automatically move all assigned participants into breakout rooms: 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.
- Auto close breakout rooms after () 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 and co-hosts will be notified when the breakout room time is up.
- Set Countdown timer: 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.

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 the 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. Hover over the participant or room for these options:

- Move to (participant): Select a room to move the participant to.
- Exchange (participant): Select a participant in another room and swap places with the selected participant.
- Delete Room: Delete the selected room.
- Recreate:
  ◊ Recreate all Rooms: Deletes existing breakout rooms and allows the host/co-host to create new ones.
  ◊ Recover to pre-assigned rooms: Recreate the breakout rooms with the pre-assigned arrangement. This is only available if using the pre-assign breakout rooms feature.
- Add a Room: Add another breakout room.
- Open All Rooms: Start the rooms. All assigned participants will be moved to their respective rooms after confirming the prompt to join the breakout room. If allowing participants to choose their own room, they can open the list of rooms and choose which to join. The host, or co-host that launched the breakouts and the original 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 assigned participants will be asked to join the Breakout Session. The host, or co-host that launched the breakouts and the original 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. You can click these options in the breakout rooms window:

- 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, which is shown to the host, co-hosts, 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 or co-hosts can broadcast a message to all breakout rooms to share information with all participants. This can be done from the main session or from within a breakout room.

- Click Breakout Rooms in the meeting controls.
- Click Broadcast message to all, enter your message, and click Broadcast.

The message will now appear for all participants in breakout rooms.

Share screen to breakout rooms

Once breakout rooms are open, the host or co-host can share their screen from the main session directly into all open breakout rooms. This allows the presenter to share visual information to all breakout rooms at once, guiding them on next steps or tasks.

- Click **Share Screen** in the meeting controls.
- Enable the Share to breakout rooms option along the bottom of the share window.
- Choose what you would like to share, including an entire screen, a specific open program, or others.
- Click **Share**. The selected content will be shared to all breakout rooms. Any active shares in any breakout rooms will be interrupted for the host's/co-host's shared screen. Annotation or whiteboarding is saved before the host's shared content is viewed.
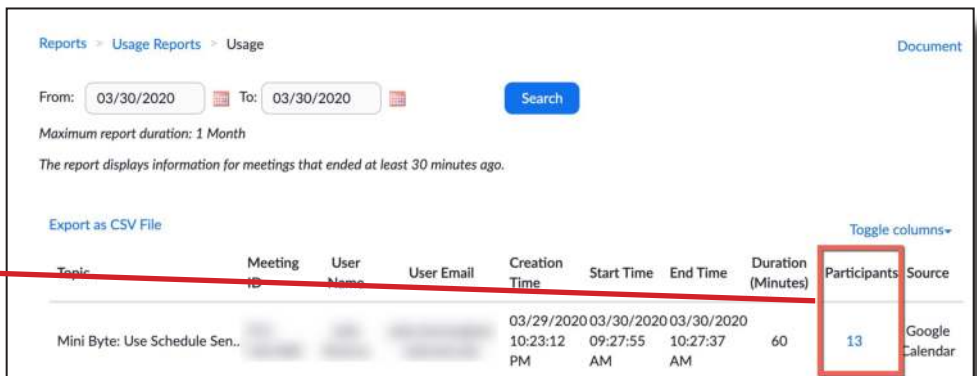
Creating Zoom Reports

Below are the instructions to create reports for a meeting. These can be helpful in determining if all registered participants were able to attend, and whether they were able to participate in all aspects of the session.

Sign into your Zoom web portal account.

Click on **Reports** on the left; you'll see Usage and Meeting. Click **Usage** (for attendance) or **Meeting** (for registration or polling reports) depending on the type of report you want; then, follow the steps below.

Reports for Attendance: Click Usage

❑ From the Usage Reports option, click **Usage**

❑ At the top, adjust the From and To date range to include that meeting/event/class you want to find and click **Search**

❑ For the event you want a report for, click the number of **Participants** in blue, e.g., 13 in this image:

❑ In the window that opens, look over the attendees there or click **Export** to download a .csv file of participants

Reports for Registration and Polling: Click Meeting

- ❑ From the Usage Reports option, click **Meeting**
- ❑ Select **Report Type** (Registration Report OR Poll Report)
- ❑ Adjust the From and To dates as necessary and click **Search**
- ❑ To the right of the event you want the report for, click **Generate**
- ❑ The Report Queue will display (or click **Report Queue** to open it)
- ❑ To the right of the report you want to see, click **Download** to download a .csv file of the report

Let the Learning Begin!

This is a general guide to facilitating an Instructor-led virtual certification/continuing education program utilizing the Zoom platform. Please reach out to your facilitator or the HealthCare Partnership if you need more information or assistance!

For more tutorials and features for Zoom meetings and webinars, visit the Zoom Support page at:

https://support.zoom.us/hc/en-us/articles/206618765-Zoom-video-tutorials