GETTING PREPARED

Get Started

1. Visit ucsf.zoom.us
2. Select "sign-in"
3. For first-time users, select "Login with SSO," enter "ucsf" as domain, and enter your MyAccess username and password. After logging in, an account is created automatically. You will see your name at the top of the webpage: ucsf.zoom.us/profile
4. For returning users, enter your MyAccess username and password and access your account
5. The ZOOM Client is downloaded automatically
6. Now you are signed in to your ZOOM account
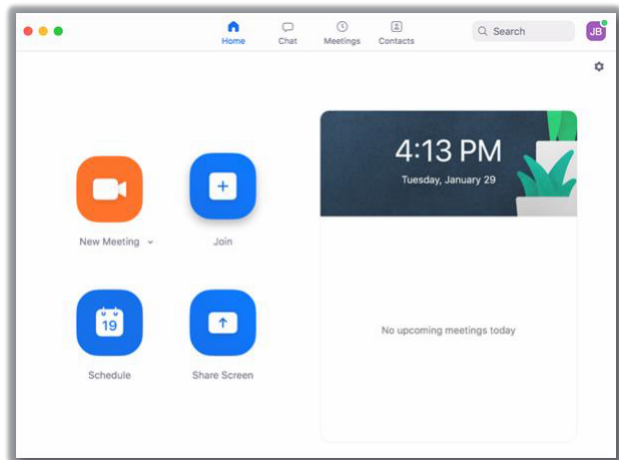
Zoom Client. If yours looks different than this, check for updates.

Schedule a Meeting from Your Browser

1. From your ucsf.zoom.us/profile page, select "Schedule a Meeting"
2. Enter meeting details
3. Under "Meeting Options," select "Enable join before host"
4. Select "Save" at the bottom
5. Select "Copy the invitation"
6. A window will open; select "Copy Meeting Invitation" button at the bottom and close the window using the X in the upper right
7. Open your Outlook account and create a new meeting invitation
8. Paste it into the Outlook calendar invitation and invite participants to your meeting
9. Consider simplifying the lengthy ZOOM invitation using only this key information:
   o Videoconferencing: Click https://ucsf.zoom.us/j/000000000
   o Phone conferencing: Dial (000) 000-0000 and enter meeting ID: 000 000 000
   o iPhone single-tap: Dial +10000000000, 00000000#
10. Encourage ZOOM participants to review the ZOOM Guide for Participants – Basic or Advanced by including this link in the invitation: https://meded.ucsf.edu/ZOOM

Pre-meeting (Initial setup and 8:30-9am prep)
- Organizer (Jonathon) will Create Zoom event
- When creating the Zoom event, Organizer will select:
  - Participant video OFF
  - Meeting Options
    - Enable join before host
    - Mute participants upon entry
   - Do not add alternative hosts here. (Unless plan to add Adrian/host?)
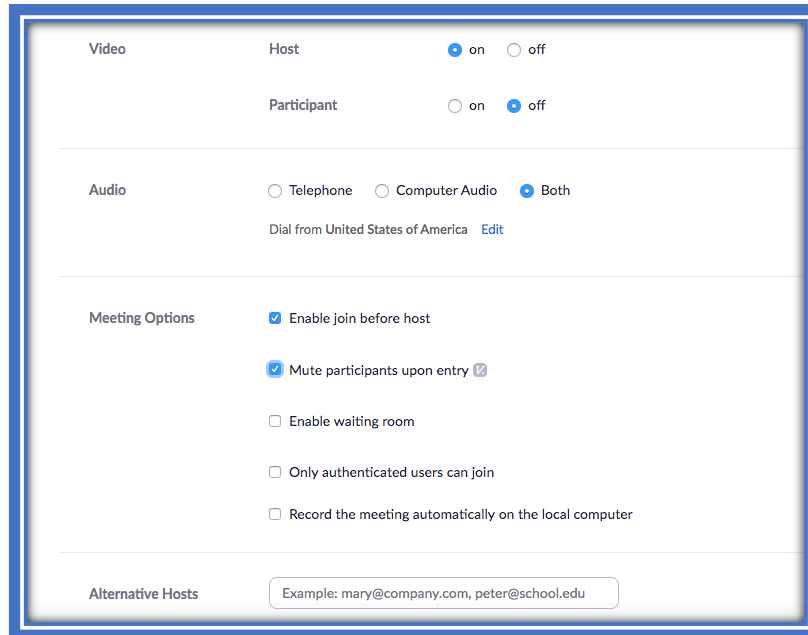
- Organizer will designate Moderator (Adrian/Host) and presenters as Co-Hosts
  - NOTE: ALTERNATIVE HOST IS NOT THE SAME THING AS CO-HOST. To assign Co-Hosts, the meeting must be started and co-hosts manually assigned *in meeting*.
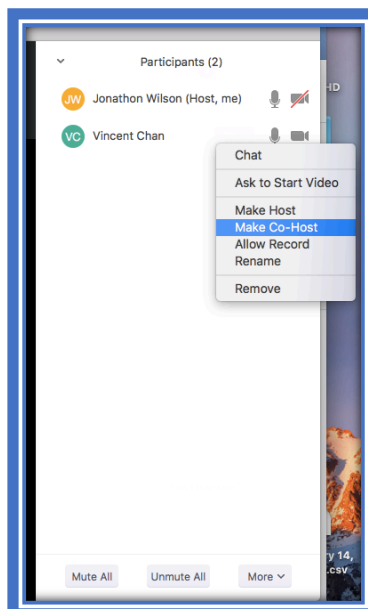
- Set mute settings
  - Under Manage Participants, click More and ensure:
    - "Mute Participants On Entry" is ON
    - "Allow participants to unmute themselves" is OFF
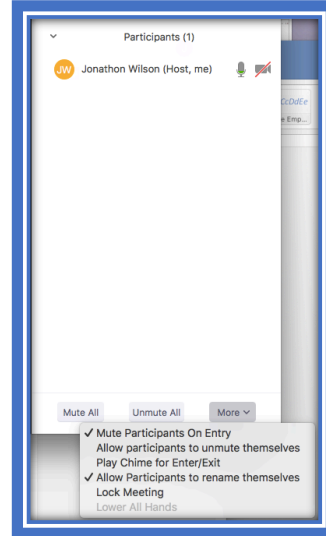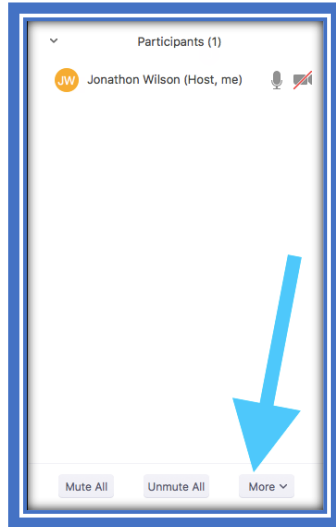
- Adjust share settings
  - Click the arrow next to Share, bringing up Advanced Sharing Options.
  - From there, switch "Who can share" to Only Host
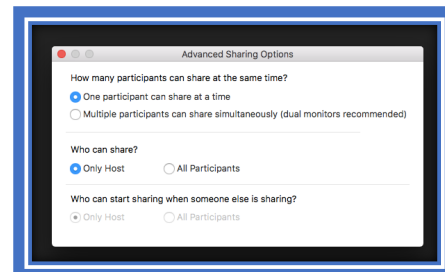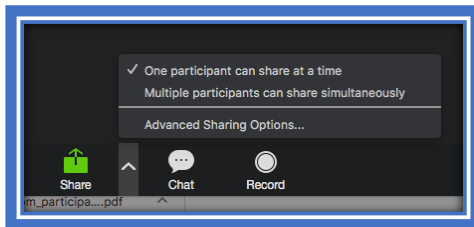
- There is the ability to set up Polls in zoom if there are prepared questions the hosts would like to ask beforehand. Creating these on the fly is clunky, so best to input them *before* the start of the actual event.

Actual meeting (9-10)
- Moderator will briefly go over etiquette
  - When members of the crowd would like to ask a question, they will digitally "raise their hand". Note, as long as the participant list is set to "mute all" by the host, participants with their hands raised should jump to the top of the host participant management list.
  - Moderator will then unmute them, allowing the participant to ask their question. The moderator will remute the question asker at the appropriate point.
  - If someone is asking a question, it would be ideal for them to reactivate for video feed, though this is not a requirement. It would also be ideal if they kept their video off if not asking a question.