MEDIATOR'S GUIDE TO USING ZOOM

A. SCHEDULING THE MEDIATION

1) Conduct Pre-mediation Zoom conference with counsel to explain Zoom Controls, and Security Features, exchange cell phones numbers for counsel and Mediator in case technology fails.

2) Schedule Meeting /Go to Zoom/ My Account/Schedule Meeting/ Select Options
    - Require meeting id and a password to enter the mediation (**Security Measure!**)
    - Enable waiting room and mute participants upon entry to mediation (**Security Measure!**)

3) Suggested Zoom Settings for Mediation: Go to Zoom Profile/Settings/Meeting Tab
    - **Host and Participants Video**: Enable (allows Parties to see and hear all participants)
    - **Join Before Host:** Disable (keeps Parties from being in a room together and no one can join without the Mediator there to start the Mediation) (**Security Measure**!)
    - **Use Personal Meeting ID (PMI) when starting**: Disable
    - **Required a password when scheduling new meetings**: Enable (only persons with password can join the Mediation) (**Security Measure!**)
    - **Mute participants upon entry**: Enable
    - **Chat**: Enable and check box to prevent participants from saving chat
    - **Private Chat**: Disable (may be risky for Parties to send private messages)
    - **Co-host**: Enable (May want assistant to participate in setting up mediation)
    - **Screen sharing:** Enable for all participants (Shared Documents and Settlement Agreement)
    - **Annotation:** Enable (edit information on shared documents/sign Settlement Agreement)
    - **Whiteboard**: Enable (allows parties to share white board during mediation)
    - **Breakout Room**: Enable (allows Mediator to split Parties into private rooms)
    - **Waiting Room;** Enable for all parties/customize the title and description of mediation
    - **Virtual background**: enable (allows Parties to replace background with professional image)
    - **Local Recording**: Disable in the Settings/Recording Tab (Don't want Parties to record the Meditation)
    - **Cloud recording**: Disable in the Settings/Recording Tab

B. PREPARATION PRIOR TO STARTING MEDIATION

1) Test audio and video on computer to ensure computer is fully charged and/or connected to a charger; also make sure cell phone is charged.

2) Start meeting 5 minutes early to check connection.

3) Choose professional background whether virtual or in your home office.

4) Silence other devices (cell phone).

5) Inform any persons in vicinity that you will be unavailable and in private mediation.

6) Check settings desired for Mediation. (Chat disable so parties can't send private messages, recording)

C. MEDIATION SESSION

1) Introduce parties/ welcome them/make sure they all can hear and see each other.

2) Lock the meeting /Explain if locked out need to contact Mediator on cell phone to get back in.

3) Remind parties to provide cell phone/email contacts in case of technology malfunction.

4) Explain security safeguards (password protected, lock meeting, meeting id).

5) Confirm parties agreed that there is no recording of this Session on Zoom or cell phones/Host disabled recording.

6) Confirm parties agreed that only parties/Counsel are in the room and no other persons may be in the room or within listening distance.

7) Confirm parties/Counsel did not share Zoom invite, password, or meeting ID with anyone else

8) Go Over Zoom controls (view, mute, video, chat, participants, share screen and waiting room)

9) Explain Mediator Disabled chat/ counsel may want to enable.

10) Explain Break out Rooms are separate private virtual rooms, there is a delay in returning to joint session, they can communicate with Mediator by using "Ask for Help" control, and Mediator can broadcast messages to parties/Counsel.

11) Explain Mediator has separate Break out room for private caucus with counsel.

D. ZOOM CONTROLS

1) **Waiting Room**

   - Upon arrival to waiting room parties are greeted with the Mediator's customized message.

   - Waiting room guests are muted from communicating with each other.

   - Guests cannot see who else is in the waiting room.

   - Host determines whether to let in or remove a participant from the waiting room.

2) **Breakout Rooms**

   - Mediator clicks on "Breakout Rooms" in control.

   - Manually select the number of rooms you would like to assign parties in.

   - Set up a room for Mediator to enable private caucus with counsel.

   - Mediator names rooms for easy identification (Plaintiff's room, Defendant's room and Mediator room)

   - Click create rooms.

   - Mediator invites parties/counsel to join the Breakout room.

   - Parties will click Join Breakout room when invite arrives.

   - If Parties need help or want Mediator to come to their room, they can click on "Ask for Help" in Meeting Controls.

3) **In-Meeting Chat Messages**

   The in-meeting chat allows the Mediator to send messages to other people in the meeting, privately or to the entire group. Mediator can also disable chat entirely.

   - While in the meeting, click CHAT in the meeting controls.

- This will open the chat on the right. You can type a message into the chat box or click on the drop down next to: if you want to send a message to a specific person.

- When a new chat message is sent to you or everyone, a preview of the message will appear, and Chat will flash orange in your host controls.

Mediator controls and changing the settings in Chat

- While in a meeting, click Chat in the meeting controls.

- Click More to display in-meeting chat settings.

- You can access the following options:

  - Save chat: Save all chat messages in a TXT file.
  - Share file in meeting: Send a file in the chat.
  - Allow attendees to chat with: Control who participants can chat with.
  - No one: Disables in-meeting chat.
  - Host only: Only the host can send messages to everyone. Parties can still send private messages to the host.
  - Everyone publicly: Participants can only send public messages. Public messages are visible to all participants. Participants can still send private messages to the host.
  - Everyone publicly and privately: Participants can send public or private messages. Public messages are visible to all participants. Private messages are sent to a specific participant.

Replying to a message

- Hover over the message you want to reply to.

- Click the chat bubble icon.

- Type your reply, then press Enter.

*You can react to messages by adding an emoticon.
- Hover over the message you want to react to.

- Click the smiley icon.

- Select an icon. You can select from the same emoticons available when composing a chat message.

4) **Document Sharing**

There are three main ways to share documents during a Zoom mediation:

A. **Screen Share**

- The Mediator and the Parties can share their screen during the mediation.

- Click on the Share Screen button located in your meeting controls.

- Select the screen you want to share and click share.

- Once the screen is opened and shared during the mediation, anyone can use the "annotate" tool (located at the top of the screen) to call attention to a particular part of the shared document by using the pen tool to "draw" on the document (Parties can sign the Memorandum of Understanding or Settlement Agreement at end of mediation)

- To exit the screen, click on Exit Full Screen in the upper top-right corner.

TIP: For ease of access, participants are encouraged to open/load any documents they might wish to share or reference during a mediation on their computer desktop before the Zoom mediation begins.

TIP: If sharing your desktop, it's best to make sure any unnecessary or private windows are closed before sharing your desktop.

TIP: If the document you are sharing is a video or has sound, you should click the "share computer sound" and "video optimize" buttons at the bottom of the screen.

TIP: If someone is having difficulty with the Share Screen feature, they can simply email the document to another participant (e.g. the Mediator) and ask that person to share the document with everyone using Share Screen.

B. **Chat**

Chat is especially useful for sharing links to websites, and also for sharing documents to be downloaded by the other participants.

- Click on **Chat** control.

- Select More and choose the option to **Share file**.

- Participants will see a notice when a file is sent and will be given an option to download the file.

C. **Simply hold the document up to your web cam.**

For additional support on Zoom go to https://support.zoom.us/

ZOOM SETTINGS

Host video   **ON**
Start meetings with host video on

Participants video   **ON**
Start meetings with participant video on. Participants can change this during the meeting.

Audio Type **ON**
Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all participants follow the instructions you provide for using non-Zoom audio.

◉ Telephone and Computer Audio ◯ Telephone ◯ Computer Audio

Join before host   **OFF**
Allow participants to join the meeting before the host arrives

Enable Personal Meeting ID   **ON**
A Personal Meeting ID (PMI) is a 9 to 11 digit number that is assigned to your account.

Use Personal Meeting ID (PMI) when scheduling a meeting   **OFF**
You can visit [Personal Meeting Room](#) to change your Personal Meeting settings.

Use Personal Meeting ID (PMI) when starting an instant meeting

Require a password for Personal Meeting ID (PMI)   **OFF**

Only authenticated users can join meetings
The participants need to authenticate prior to joining the meetings, hosts can choose one of the authentication methods when scheduling a meeting.

Only authenticated users can join meetings from Web client
The participants need to authenticate prior to joining meetings from web client

Require a password when scheduling new meetings **ON**
A password will be generated when scheduling a meeting and participants require the password to join the meeting. The Personal Meeting ID (PMI) meetings are not included.

Require a password for instant meetings **ON**
A random password will be generated when starting an instant meeting

Embed password in meeting link for one-click join **ON**
Meeting password will be encrypted and included in the join meeting link to allow participants to join with just one click without having to enter the password.

Require password for participants joining by phone ON

A numeric password will be required for participants joining by phone if your meeting has a password. For meeting with an alphanumeric password, a numeric version will be generated.

Mute participants upon entry   ON

Automatically mute all participants when they join the meeting. The host controls whether participants can unmute themselves.

Upcoming meeting reminder

Receive desktop notification for upcoming meetings. Reminder time can be configured in the Zoom Desktop Client.

IN MEETING (BASIC)

Require encryption for 3rd party endpoints (SIP/H.323) ON

By default, Zoom requires encryption for all data transferred between the Zoom cloud, Zoom client, and Zoom Room. Turn on this setting to require encryption for 3rd party endpoints (SIP/H.323) as well.

Chat ON

Allow meeting participants to send a message visible to all participants

☑   Prevent participants from saving chat

Private chat OFF

Allow meeting participants to send a private 1:1 message to another participant.

☐

Auto saving chats OFF

Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.

☐

Play sound when participants join or leave ON

Play sound when participants join or leave

☐   ○ Heard by host and all attendees ◉ Heard by host only

When each participant joins by telephone

☐   Record and play their own voice

File transfer ON

Hosts and participants can send files through the in-meeting chat.

☐

Feedback to Zoom

Add a Feedback tab to the Windows Settings or Mac Preferences dialog, and also enable users to provide feedback to Zoom at the end of the meeting

☐

Display end-of-meeting experience feedback survey

Display a thumbs up/down survey at the end of each meeting. If participants respond with thumbs down, they can provide additional information about what went wrong.

☐

Co-host ON

Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.

☐

Polling

Add 'Polls' to the meeting controls. This allows the host to survey the attendees.

☐

Always show meeting control toolbar ON

Always show meeting controls during a meeting

☐

Show Zoom windows during screen share

☐

Screen sharing ON

Allow host and participants to share their screen or content during meetings

☐

Who can share?

○ Host Only ⊙ All Participants

Who can start sharing when someone else is sharing?

○ Host Only ⊙ All Participants

Disable desktop/screen share for users

Disable desktop or screen share in a meeting and only allow sharing of selected applications.

☐

Annotation ON

Allow participants to use annotation tools to add information to shared screens

☐

Whiteboard ON

Allow participants to share whiteboard during a meeting

☐

☐   Auto save whiteboard content when sharing is stopped

Remote control

During screen sharing, the person who is sharing can allow others to control the shared content

☐

Nonverbal feedback

Participants in a meeting can provide nonverbal feedback and express opinions by clicking on icons in the Participants panel.

☐

Allow removed participants to rejoin

Allows previously removed meeting participants and webinar panelists to rejoin

☐

Allow participants to rename themselves

Allow meeting participants and webinar panelists to rename themselves.

☐

Hide participant profile pictures in a meeting

All participant profile pictures will be hidden and only the names of participants will be displayed on the video screen. Participants will not be able to update their profile pictures in the meeting.

☐

IN MEETING (ADVANCED)

Report participants to Zoom ON

Hosts can report meeting participants for inappropriate behavior to Zoom's Trust and Safety team for review. This setting can be found on the Security icon on the meeting controls toolbar.

☐

Breakout room ON

Allow host to split meeting participants into separate, smaller rooms

☐

☐ Allow host to assign participants to breakout rooms when scheduling

Remote support

Allow meeting host to provide 1:1 remote support to another participant

☐

Closed captioning

Allow host to type closed captions or assign a participant/third party device to add closed captions

☐

Save Captions

Allow participants to save fully closed captions or transcripts

☐

Far end camera control

Allow another user to take control of your camera during a meeting

☐

Group HD video

Activate higher quality video for host and participants. (This will use more bandwidth.)

☐

Virtual background ON

Allow users to replace their background with any selected image. Choose or upload an image in the Zoom Desktop application settings.

☐

Identify guest participants in the meeting/webinar

Participants who belong to your account can see that a guest (someone who does not belong to your account) is participating in the meeting/webinar. The Participants list indicates which attendees are guests. The guests themselves do not see that they are listed as guests.

☐

Auto-answer group in chat

Enable users to see and add contacts to 'auto-answer group' in the contact list on chat. Any call from members of this group will be automatically answered.

☐

Only show default email when sending email invites

Allow users to invite participants by email only by using the default email program selected on their computer

☐

Use HTML format email for Outlook plugin

Use HTML formatting instead of plain text for meeting invitations scheduled with the Outlook plugin

☐

Allow users to select stereo audio in their client settings

Allow users to select stereo audio during a meeting

☐

Allow users to select original sound in their client settings

Allow users to select original sound during a meeting

☐

Select data center regions for meetings/webinars hosted by your account

Include all data center regions to provide the best experience for participants joining from all regions. Opting out of data center regions may limit CRC, Dial-in, Call Me, and Invite by Phone options for participants joining from those regions.

☐

Waiting room ON

When attendees join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing attendees to join before host.

☐

Choose which participants to place in the waiting room:

◉ All participants ○ Guest participants only

Customize the title, logo, and description ON

Show a "Join from your browser" link

Allow participants to bypass the Zoom application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited

☐

Allow live streaming meetings

☐

When a cloud recording is available

Notify host when cloud recording is available

☐

☐   Send a copy to the person who scheduled the meeting/webinar for the host

When attendees join meeting before host

Notify host when participants join the meeting before them

☐

When a meeting is cancelled

Notify host and participants when the meeting is cancelled

☐

When an alternative host is set or removed from a meeting

Notify the alternative host who is set or removed

☐

When someone scheduled a meeting for a host

Notify the host there is a meeting is scheduled, rescheduled, or cancelled

☐

When the cloud recording is going to be permanently deleted from trash

Notify the host 7 days before the cloud recording is permanently deleted from trash

☐

OTHER

Blur snapshot on iOS task switcher

Enable this option to hide potentially sensitive information from the snapshot of the Zoom main window. This snapshot display as the preview screen in the iOS tasks switcher when multiple apps are open.

☐

Invitation Email

Your meeting attendees will receive emails in language based upon their browser/profile settings. Choose languages which your expected attendees will receive content in to edit.

Choose email in language to edit

[   ]

Send me a preview email

Schedule Privilege

You can assign users in your account to schedule meetings on your behalf. You can also schedule meetings on behalf of someone that has assigned you scheduling privilege. You and the assigned scheduler must be on a Paid plan within the same account.

ZOOM Scheduling A Meeting

Topic

My Meeting

Description (Optional)

Select a template

When

start time

Duration

hr

min

Time Zone

☐   Recurring meeting

Registration

☐   Required

Meeting ID

◉ Generate Automatically ○ Personal Meeting ID 216-235-3284

Meeting Password

☐ Require meeting password

Require meeting password [   ]

Video
Host

◉ on ○ off

Participant

◉ on ○ off

Audio

○ Telephone ○ Computer Audio ◉ Both
Dial from **United States of America** [Edit](#)

Meeting Options

☐ Enable join before host

☐ Mute participants upon entry

☐ Enable waiting room

☐ Only authenticated users can join

☐ Breakout Room pre-assign

☐ Record the meeting automatically

Alternative Hosts