

CIBC ZOOM GUIDE



The CIBC Zoom Guide is intended to help consultants arrange, secure, and offer technical support when providing virtual technical assistance using the Zoom platform. The links in this guide are housed on the WestEd Intranet. Staff will need to login to their WestEd account via OneLogin.

SET-UP & SECURITY



Getting Started with Zoom

Zoom is an easy, reliable cloud-based platform for video and audio conferencing, chat, and webinars. All WestEd staff automatically get a Zoom account. The link will guide consultants through the steps to schedule Zoom meetings.

https://links.simpplr.com/?u=https%3A%2F%2Fwestedintranet--simpplr.na129.visual.force.com%2Fapex%2Fsimpplr_app%3Fu%3D%2Fsite%2Fa076100003hT41AAE%2Fpage%2Fa01610000FRfnRAAT

Zoom for Mobile

Zoom for mobile devices is discussed in the Getting Started article and is a good resource to be familiar with since some of your consultations may be provided over a mobile device rather than a laptop or desktop computer. For more information about Advanced Setting for Zoom Mobile please use the following link:

https://links.simpplr.com/?u=https%3A%2F%2Fwestedintranet--simpplr.na129.visual.force.com%2Fapex%2Fsimpplr_app%3Fu%3D%2Fsite%2Fa076100003hT41AAE%2Fpage%2Fa01610000HW5XjAAL

Helping Program Staff/Providers Set-Up a Zoom Account for Their Personal Use:

Download the Zoom app from the App Store or Play Store, tap to open it. Tap "Sign Up" on the welcome page. The other options will be "Sign In" (if you already have an account) or "Join a Meeting" (if you were sent a meeting ID via email or text).

All Zoom meetings should be set up by consultants using their WestEd Zoom account. The Meeting ID and Password should be provided to the program prior to the consultation session.

Maintaining Zoom Security

Zoom is continually releasing updates to address ongoing security concerns. *Updating your Zoom client frequently is important for ensuring that you have the latest security features.* For more information regarding Zoom security features please use the link below:

https://links.simpplr.com/?u=https%3A%2F%2Fwestedintranet--simpplr.na129.visual.force.com%2Fapex%2Fsimpplr_app%3Fu%3D%2Fsite%2Fa076100003hT41AAE%2Fpage%2Fa014M00000QldOXQAZ

CIBC Security Settings:

CIBC does not record virtual consultation visits.

Please either enable the Waiting Room in your Zoom settings or a Passcode. Passcodes are embedded in the Zoom meeting link once enabled in settings.

For all meetings use random meeting ID.

TROUBLE SHOOTING

Providing a phone number for tech support can often help program staff/providers that are unable to connect to the Zoom meeting and/or use the chat or audio features.

Chat privately if needed with any participants having a hard time connecting.

IN SESSION INFORMATION

Offer both video and audio options allow participants to choose.

Google docs can be shared with staff/providers in live time and be used for reflections, notetaking, and action planning during the consultation sessions.

If you will be playing a video in the Zoom meeting please make sure that you are not using headset. If you are using a headset the participants will not be able to hear the audio when the video is played.

Screen sharing is available for the meeting host. There will be a green box around the area that is being shared. This option can be used for sharing documents and resources during the virtual consultation.

Language Interpretation in Zoom

If you will be working with a program that has a translator available, you may wish to use the Language Interpretation feature. Please use the following Box link for more information on the language interpretation feature in Zoom.

https://links.simpplr.com/?u=https%3A%2F%2Fwestedintranet--simpplr.na129.visual.force.com%2Fapex%2Fsimpplr__app%3Fu%3D%2Fsite%2Fa0761000003hT41AAE%2Fpage%2Fa014M00000RF73GQAT

Additional Resources

Please use the following Box folder link for additional resources:

<https://wested.box.com/s/9xezfguw7fsbsqmv3q9yoj14ub6gh6td>