



New England (HHS Region 1)

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Addiction Technology Transfer Center Network
Funded by Substance Abuse and Mental Health Services Administration

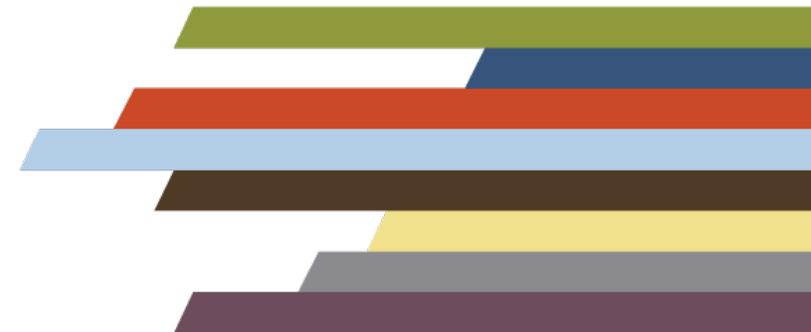
Transitioning to Effective Online Training (TEOT): Advanced Zoom Functions & Best Practices

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Mika Salas



Co-Occurring Collaborative Serving Maine

ccsme



Disclosures



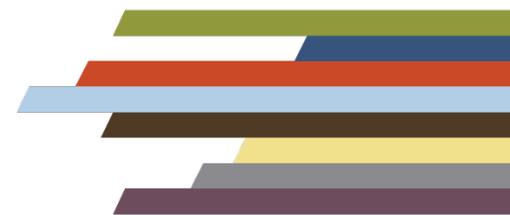
- The development of these training materials were supported by grant H79 TI080209 (PI: S. Becker) from the Center for Substance Abuse Treatment, Substance Abuse and Mental Health Services Administration, United States Department of Health and Human Services. The views and opinions contained within this document do not necessarily reflect those of the US Department of Health and Human Services, and should not be construed as such.



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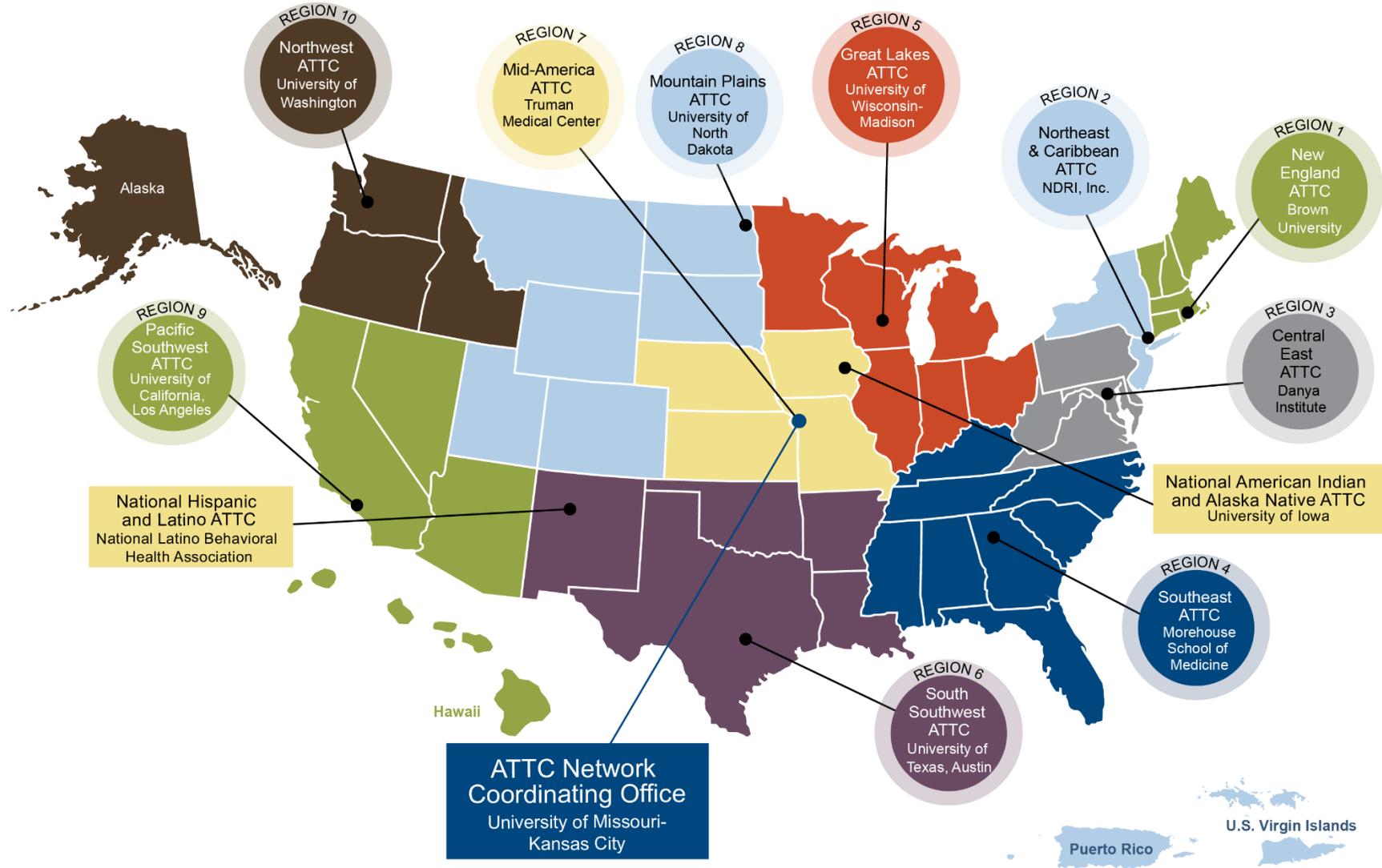




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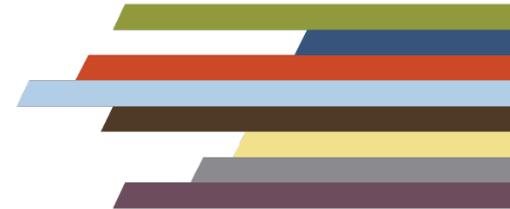
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U.S.-based ATTC Network

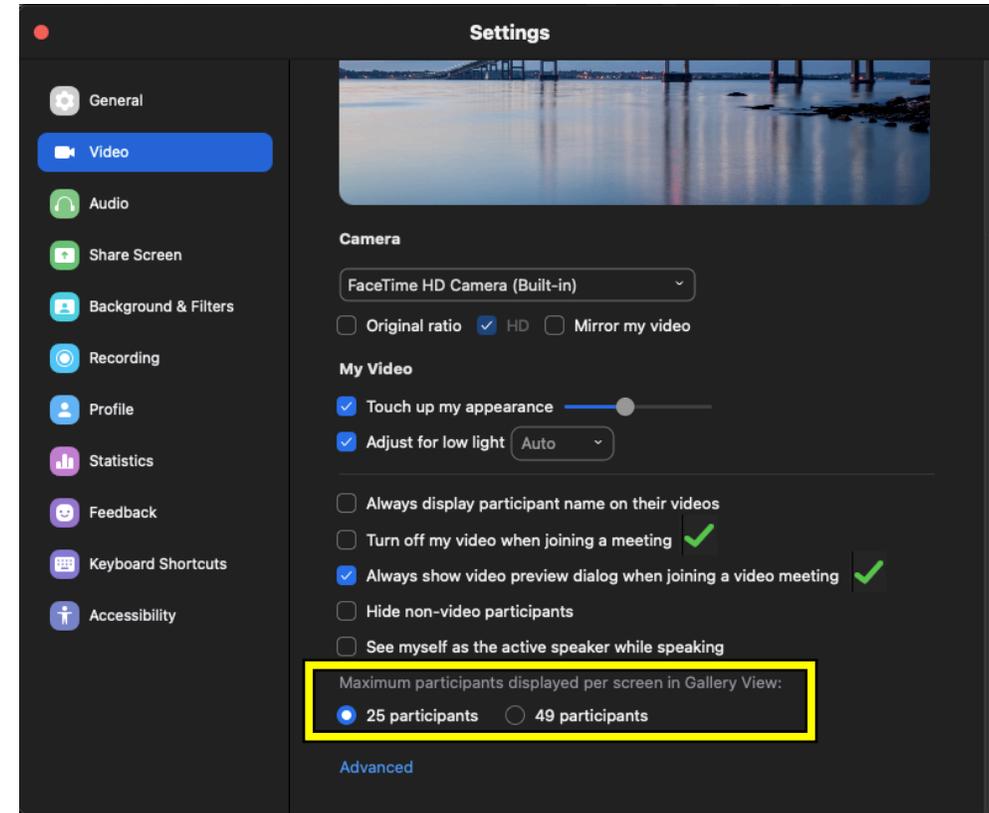
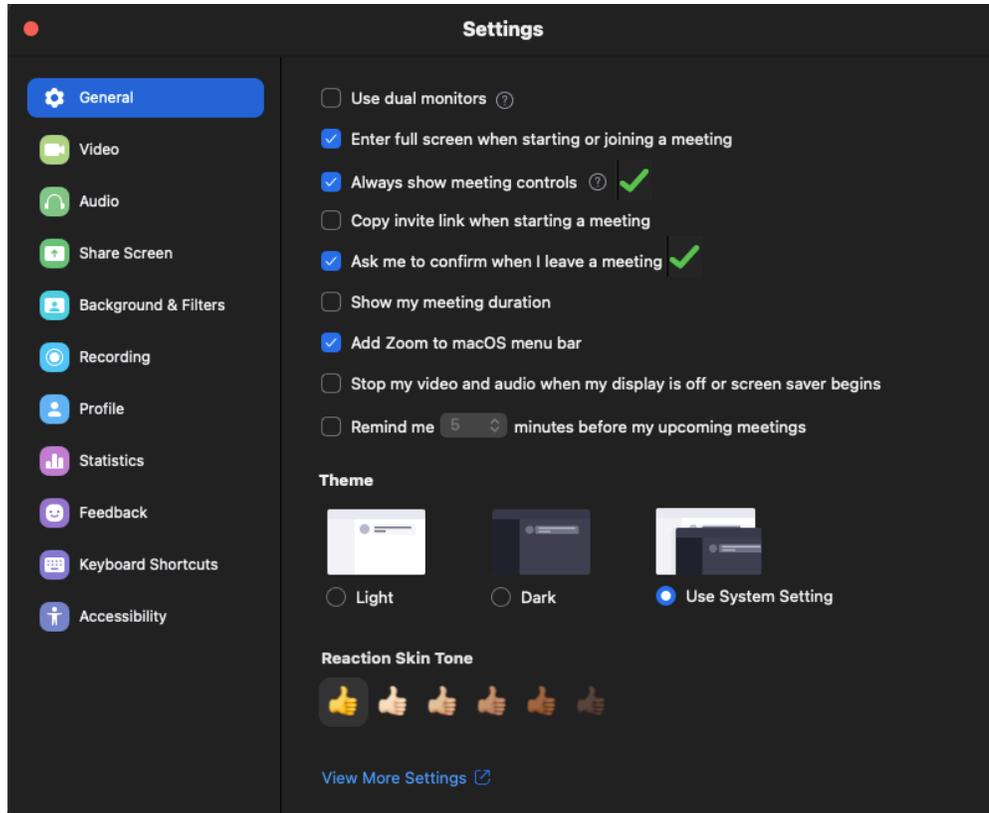


Description

- This training will introduce participants to **intermediate and advanced Zoom functions** in order to build upon the foundational skills necessary to host and facilitate any virtual meeting, training, and/or conference. Participants will explore **techniques and best practices to manage and engage participants** in their virtual training sessions using both internal and external resources, as well as practice how to implement these changes into their current curriculum. Moreover, the training will dive deep into implementation strategies **for translating their previously in-person curriculum** to a virtual platform. The trainers will facilitate **open discussion** and answer questions to promote skill acquisition.



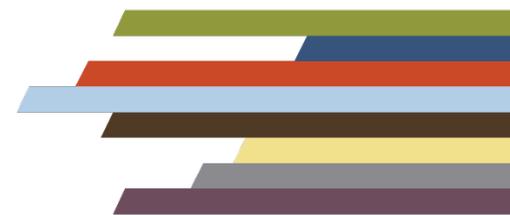
In Zoom App Advanced Settings (General/Video)



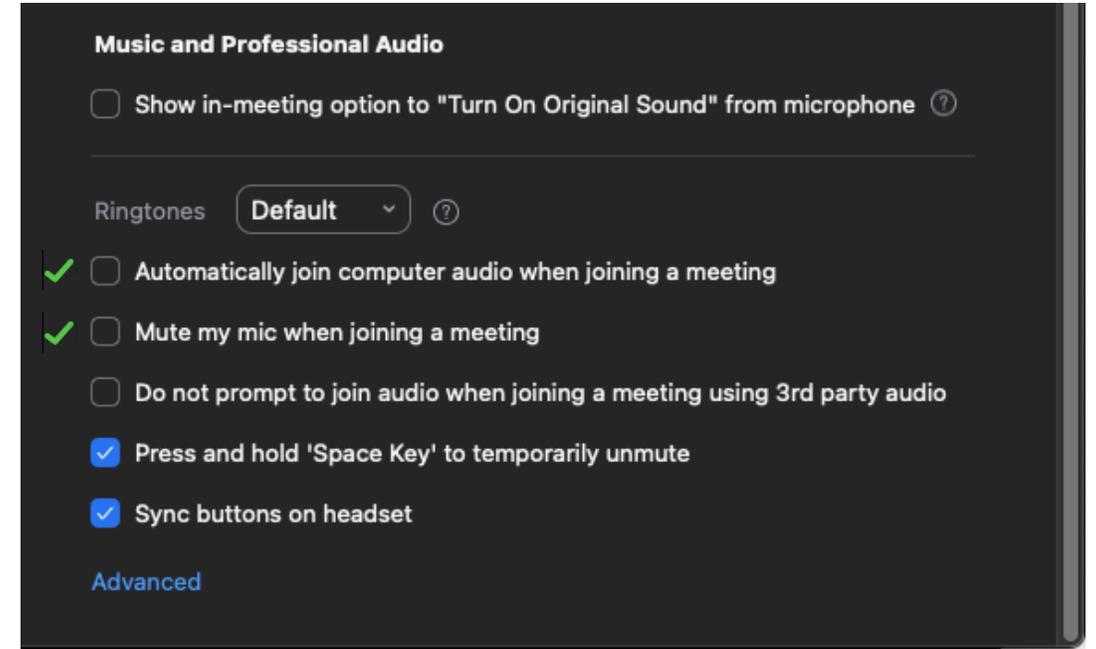
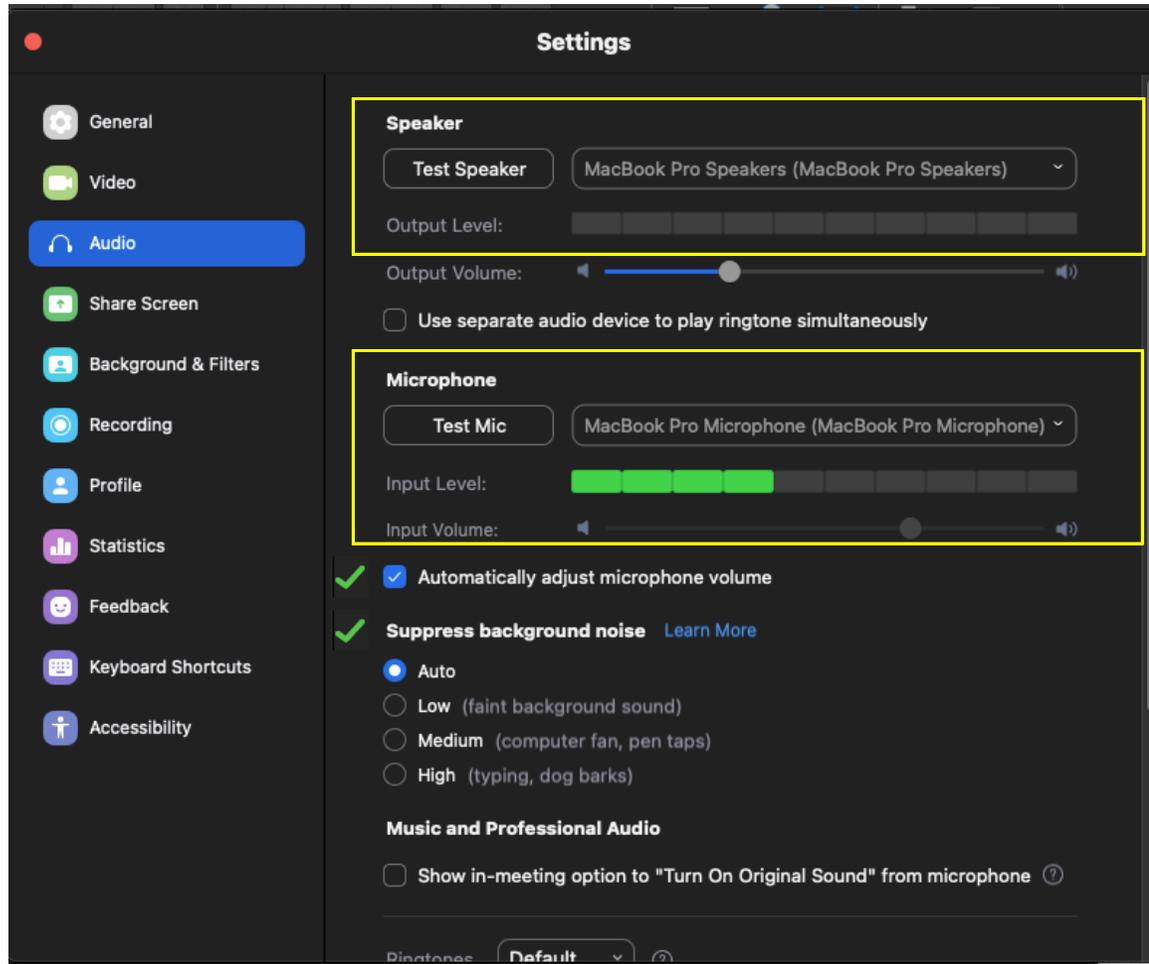
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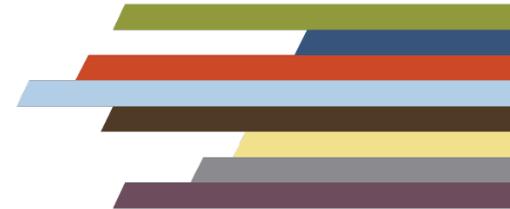
In Zoom App Advanced Settings (Audio)



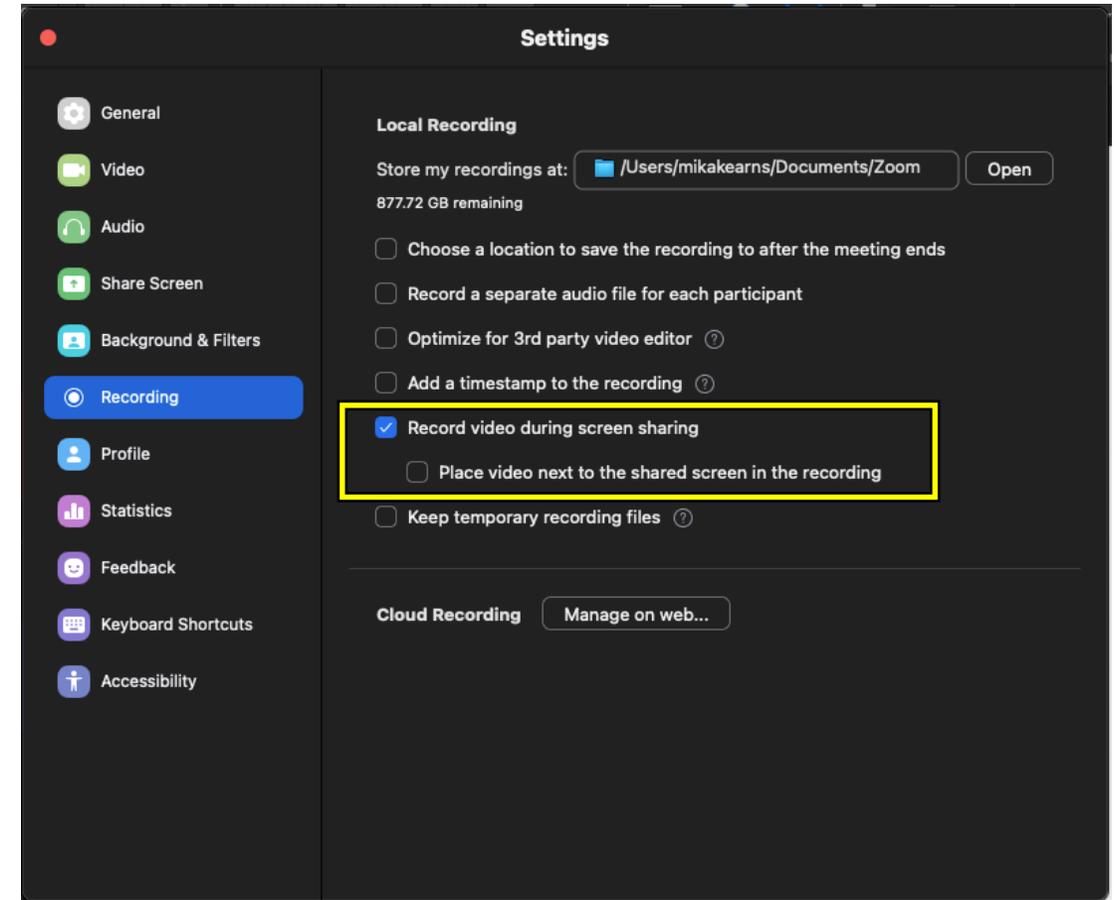
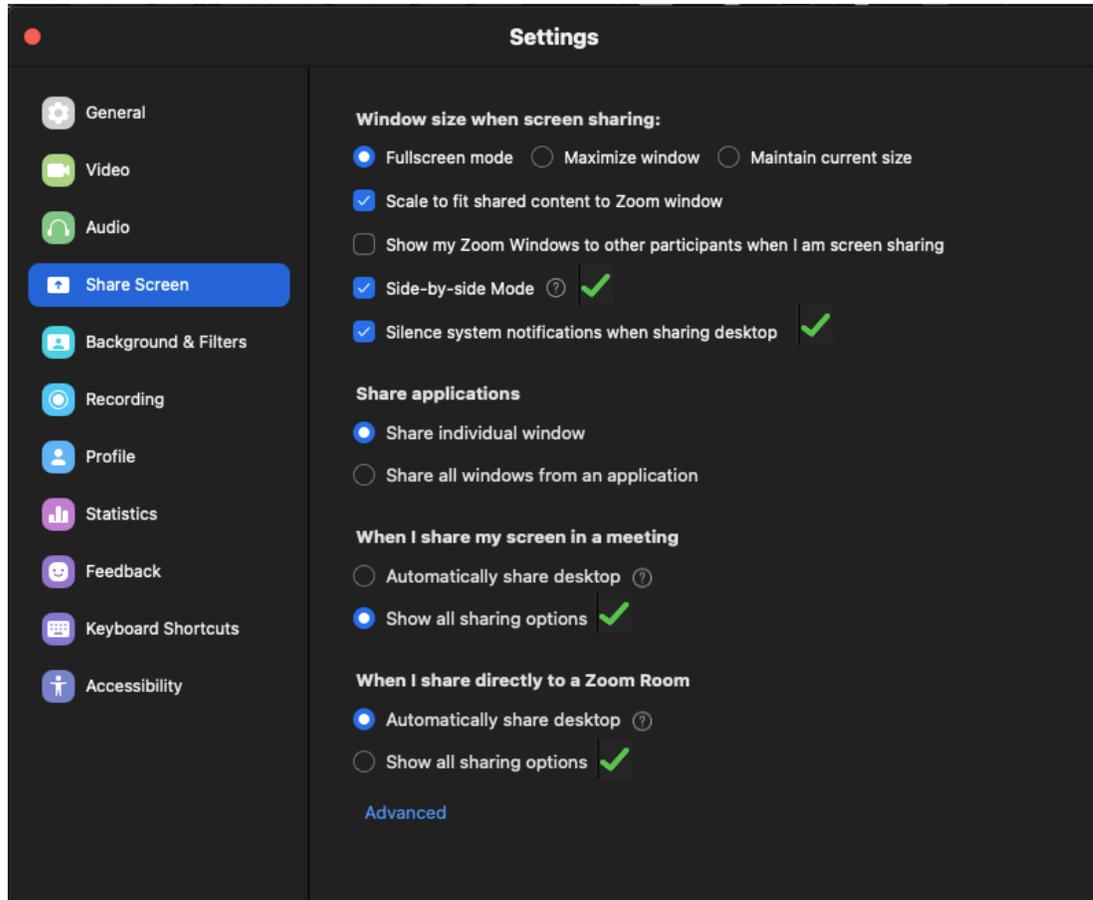
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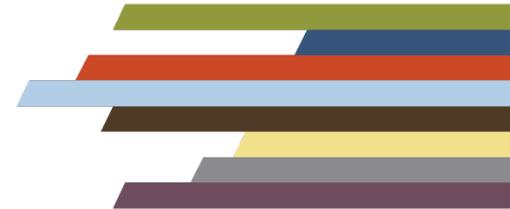
In Zoom App Advanced Settings (Share Screen/Recording)



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Backend Setup (Security)

Meeting

Recording

Telephone

Security

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Require that all meetings are secured with one security option

Require that all meetings are secured with one of the following security options: a passcode, Waiting Room, or "Only authenticated users can join meetings". If no security option is enabled, Zoom will secure all meetings with Waiting Room. [Learn more](#) ⓘ



Require a passcode for Personal Meeting ID (PMI)



Require a passcode for Personal Audio Conference



Waiting Room

When participants 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 participants to join before host.



Require passcode for participants joining by phone

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



Waiting Room Options

The options you select here apply to meetings hosted by users who turned 'Waiting Room' on

✓ Everyone will go in the waiting room

[Edit Options](#) [Customize Waiting Room](#)

Embed passcode in invite link for one-click join

Meeting passcode will be encrypted and included in the invite link to allow participants to join with just one click without having to enter the passcode.



Require a passcode when scheduling new meetings

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



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. [Learn more](#)



Require a passcode for instant meetings

A random passcode will be generated when starting an instant meeting



Meeting Authentication Options:

Brown Users only (Default) [Edit](#) Hide in the Selection

If Waiting Room is enabled, phone-only users will be placed in the Waiting Room.

If Waiting Room is not enabled, phone dial-in only users will:

Be allowed to join the meeting

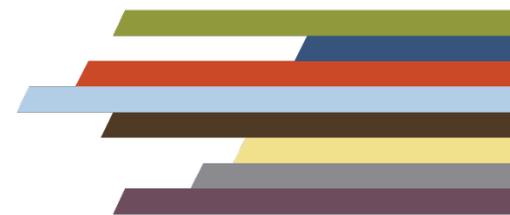
Be blocked from joining the meeting



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Backend Setup (Meeting Settings Basic)

Security	In Meeting (Basic)	
Schedule Meeting	Require encryption for 3rd party endpoints (SIP/H.323) 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.	<input checked="" type="checkbox"/>
In Meeting (Basic)		
In Meeting (Advanced)	<input checked="" type="checkbox"/> Chat Allow meeting participants to send a message visible to all participants	<input checked="" type="checkbox"/>
Email Notification	<input type="checkbox"/> Prevent participants from saving chat ?	
Other		
	<input checked="" type="checkbox"/> Private chat Allow meeting participants to send a private 1:1 message to another participant.	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Auto saving chats Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.	<input checked="" type="checkbox"/>
	Sound notification when someone joins or leaves	<input type="checkbox"/>
	<input checked="" type="checkbox"/> File transfer Hosts and participants can send files through the in-meeting chat. ?	<input type="checkbox"/>
	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	<input checked="" type="checkbox"/>
	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. ?	<input type="checkbox"/>
	<input checked="" type="checkbox"/> Co-host Allow the host to add co-hosts. Co-hosts have the same in-meeting controls as the host.	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Meeting Polls Allow host to use 'Polls' in meetings. Hosts can add polls before or during a meeting. ?	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Always show meeting control toolbar Always show meeting controls during a meeting ?	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Show Zoom windows during screen share ?	<input checked="" type="checkbox"/>
	<input checked="" type="checkbox"/> Screen sharing Allow host and participants to share their screen or content during meetings	<input checked="" type="checkbox"/>

Backend Setup (Meeting Settings Advanced)

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

In Meeting (Advanced)

✓ **Report to Zoom**
Allow users to report meeting participants for inappropriate behavior to Zoom's Trust and Safety team for review. This setting can be found on the meeting information panel. You can find the historic reports [here](#). ⓘ

✓ **Breakout room**
Allow host to split meeting participants into separate, smaller rooms
 Allow host to assign participants to breakout rooms when scheduling ⓘ

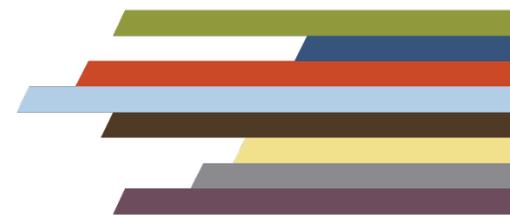
Remote support
Allow meeting host to provide 1:1 remote support to another participant

✓ **Closed captioning**
Allow host to type closed captions or assign a participant/third party device to add closed captions
 Enable live transcription service to show transcript on the side panel in-meeting

Save Captions
Allow participants to save fully closed captions or transcripts

Language Interpretation
Allow host to assign participants as interpreters who can interpret one language into another in real-time. Host can assign interpreters when scheduling or during the meeting.

Far end camera control
Allow another user to take control of your camera during a meeting. Both users (the one requesting control and the one giving control) must have this option turned on.



Backend Setup (Meeting Settings cont.)

Security **Virtual background** Customize your background to keep your environment private from others in a meeting. This can be used with or without a green screen.

Schedule Meeting

In Meeting (Basic) **Allow use of videos for virtual backgrounds**

In Meeting (Advanced) **Manage virtual background** ⓘ

Email Notification

Other



Video filters Turn this option on to allow users to apply filters to their videos ⓘ

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 Allow user to add others to an 'Auto Answer Group'. Calls from members of a user's 'Auto Answer Group' will be automatically answered for that user.

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

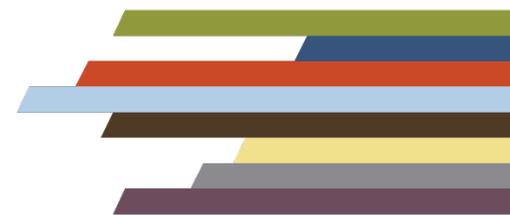
Allow users to select stereo audio in their client settings Allow users to select stereo audio during a meeting



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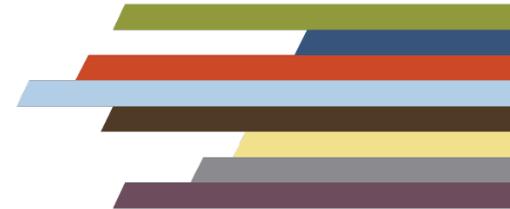
Backend Setup (Meeting Settings cont.)

Security	Allow users to select stereo audio in their client settings Allow users to select stereo audio during a meeting	<input checked="" type="checkbox"/>
Schedule Meeting		
In Meeting (Basic)		
In Meeting (Advanced)	Allow users to select original sound in their client settings Allow users to select original sound during a meeting	<input type="checkbox"/>
Email Notification		
Other	<input checked="" type="checkbox"/> 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	<input checked="" type="checkbox"/>
	Allow livestreaming of meetings	<input type="checkbox"/>
	Show a custom disclaimer when starting or joining a meeting Create your own disclaimer that will be shown at the start of all meetings hosted by your account	<input type="checkbox"/>
	Request permission to unmute Select this option in the scheduler to request permission to unmute meeting participants and webinar panelists. Permissions, once given, will apply in all meetings scheduled by the same person. <input checked="" type="checkbox"/>	<input type="checkbox"/>



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Backend Setup (Scheduling a Meeting)

My Meetings > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

When

Duration hr min

Time Zone

Recurring meeting

Registration

Required

Meeting ID

Generate Automatically Personal Meeting ID 857 037 6202

Template

Security

Passcode

Only users who have the invite link or passcode can join the meeting

Waiting Room

Only users admitted by the host can join the meeting

Require authentication to join

Video

Host on off

Participant on off

Audio

Telephone Computer Audio Telephone and Computer Audio 3rd Party Audio

Dial from United States of America [Edit](#)

Meeting Options

Allow participants to join anytime

Mute participants upon entry

Breakout Room pre-assign

Automatically record meeting

Approve or block entry for users from specific countries/regions

panopto_folder_context

Alternative Hosts

Save

Cancel

After you save and access the meeting again, these settings are at the bottom of the details:

Start Edit Delete Save as Template

Registration Email Settings **Branding** Poll

Banner Your banner is displayed at the top of your invitation page.

Upload

Image requirements:

- GIF/JPG/JPEG or 24-bit PNG
- The suggested dimensions: 640px by 200px
- The maximum dimensions: 1280px by 400px

Logo Your logo is displayed on the right side of the meeting topic on your invitation page, registration page, and in the email invitation to the meeting.

Upload

Image requirements:

- JPG/JPEG or 24-bit PNG
- The suggested dimensions: 200px by 200px
- The maximum dimensions: 400px by 400px



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Backend Setup (Registration)

Start Edit Delete Save as Template

Registration Email Settings Branding Poll

Manage Registrants Registrants: 0
Registration Options Automatically Approved
✗ Send an email to host
✗ Close registration after meeting date
✓ Allow registrants to join from multiple devices
✓ Show social share buttons on registration page

View Edit

Registration

Registration Questions **Custom Questions**

Create Your Own Question
You are prohibited from soliciting confidential personal information (such as credit card information or social security numbers) in your registration questions.

New Question

Save All Cancel

Registration

Registration Questions Custom Questions

Approval

Automatically Approve
Registrants will automatically receive information on how to join the meeting.

Manually Approve
The organizer must approve registrants before they receive information on how to join the meeting.

Notification

Send an email to host when someone registers

Other options

Close registration after event date
 Allow attendees to join from multiple devices
 Show social share buttons on registration page

Save All Cancel

Registration

Registration **Questions** Custom Questions

Add Registration Fields
First Name and Email Address required.

Field	Required
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/>
<input type="checkbox"/> Address	<input type="checkbox"/>
<input type="checkbox"/> City	<input type="checkbox"/>
<input type="checkbox"/> Country/Region	<input type="checkbox"/>
<input type="checkbox"/> Zip/Postal Code	<input type="checkbox"/>
<input type="checkbox"/> State/Province	<input type="checkbox"/>
<input type="checkbox"/> Phone	<input type="checkbox"/>
<input type="checkbox"/> Industry	<input type="checkbox"/>
<input type="checkbox"/> Organization	<input type="checkbox"/>
<input type="checkbox"/> Job Title	<input type="checkbox"/>
<input type="checkbox"/> Purchasing Time Frame	<input type="checkbox"/>
<input type="checkbox"/> Role in Purchase Process	<input type="checkbox"/>
<input type="checkbox"/> Number of Employees	<input type="checkbox"/>
<input type="checkbox"/> Questions & Comments	<input type="checkbox"/>

Save All Cancel

Registration

Registration Questions **Custom Questions**

Create Your Own Question
You are prohibited from soliciting confidential personal information (such as credit card information or social security numbers) in your registration questions.

Type Short Answer Single answer

Required

Question

Answer

Add another answer

Create Cancel

Save All Cancel

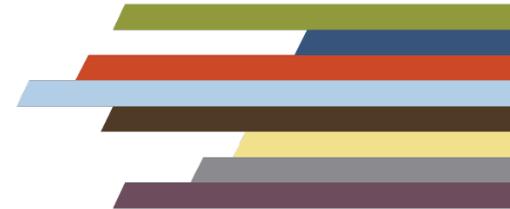
Internal Engagement Tools

Integrated in Zoom:

- Polling
- Breakout Rooms
- Reactions
- Chat

Getting Creative:

- Stop share, have everyone turn off their video, turn video on if you XYZ
- “Telephone?”: participant responds to prompt/question, then picks the next person who will respond



External Engagement Tools

** denotes that there is a free version, but has limitations

Product Name	Live Editing	Presentation Tools	Document Sharing	Survey/Quiz Tool	Document Storage	Free (\$\$)
Google Suite	X	X	X	X	X	X
Google Classroom			X	X	X	X
Mentimeter		X		X		X**
Kahoot		X		X		X**
Microsoft Suite		X	X		X	
Prezi		X				X**

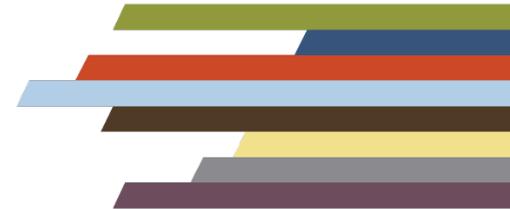
Any others you love? Throw them in the chat!



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Differentiating Training Levels

Level 1

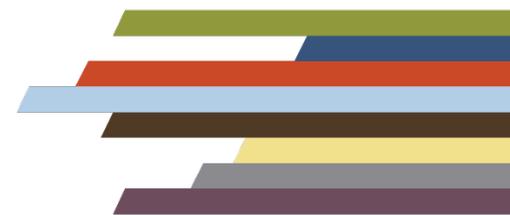
- Low level of engagement
- Typically 1 – 2 hour training
- Large participant numbers (50+)
- No Breaks
- No Breakout Rooms
- Minimal to no time for Q&A
- PowerPoint heavy

Level 2

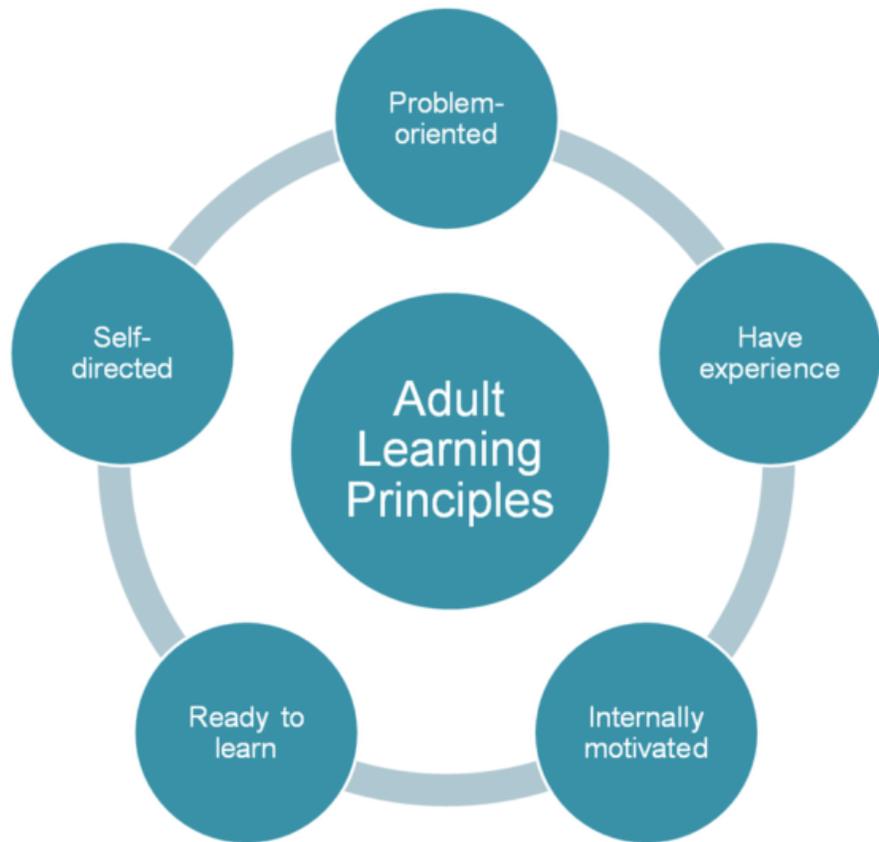
- Mid level engagement
- Typically 1.5 – 4 hour training
- Smaller participant numbers (<100)
- 1 – 2 Scheduled breaks
- Use of breakout rooms and/or group discussions
- Use of PowerPoint, but not the entirety of the training

Level 3

- High level engagement
- Typically 4+ and/or multiday training
- Small participant numbers (<40)
- Scheduled breaks/lunch
- Frequent interaction
- Use of breakout rooms, group discussions, polling, etc.
- Minimal PowerPoint time (frequently stopping share to facilitate discussion)



Adult Learning Model and Bloom's Taxonomy



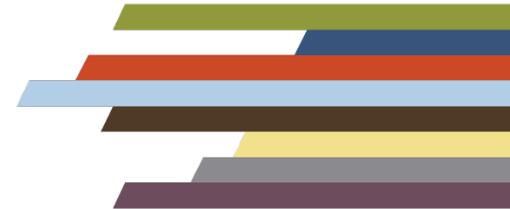
BLOOM'S TAXONOMY DIGITAL PLANNING VERBS					
REMEMBERING	UNDERSTANDING	APPLYING	ANALYZING	EVALUATING	CREATING
Copying Defining Finding Locating Quoting Listening Googling Repeating Retrieving Outlining Highlighting Memorizing Networking Searching Identifying Selecting Tabulating Duplicating Matching Bookmarking Bullet-pointing	Annotating Tweeting Associating Tagging Summarizing Relating Categorizing Paraphrasing Predicting Comparing Contrasting Commenting Journaling Interpreting Grouping Inferring Estimating Extending Gathering Exemplifying Expressing	Acting out Articulate Reenact Loading Choosing Determining Displaying Judging Executing Examining Implementing Sketching Experimenting Hacking Interviewing Painting Preparing Playing Integrating Presenting Charting	Calculating Categorizing Breaking Down Correlating Deconstructing Linking Mashing Mind-Mapping Organizing Appraising Advertising Dividing Deducing Distinguishing Illustrating Questioning Structuring Integrating Attributing Estimating Explaining	Arguing Validating Testing Scoring Assessing Criticizing Commenting Debating Defending Detecting Experimenting Grading Hypothesizing Measuring Moderating Posting Predicting Rating Reflecting Reviewing Editorializing	Blogging Building Animating Adapting Collaborating Composing Directing Devising Podcasting Wiki Building Writing Filming Programming Simulating Role Playing Solving Mixing Facilitating Managing Negotiating Leading

Best Practices



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- Update Zoom, browsers, any additional applications and perform any system updates at least a day BEFORE your training.
- Log in ~30 min prior to your event/training to check your connectivity, audio/visual, and screen share.
- Remember that participant settings (e.g., side-by-side view) and your own settings (e.g., record active speaker with shared screen) play a role in the layout/view of your presentation.
- Share your slides ahead of time (if possible)
- Manageable class sizes for solo trainers
- DRY RUNS PREVENT SURPRISES
- Your **audience** will play a large role in how long your training takes
- Share your wealth of knowledge, preparedness with colleagues/co-presenters
- Feedback is important to help guide your training, both during and in the future
- Welcome and closing messages are great ways to share info on FAQs



Best Practices Cont.

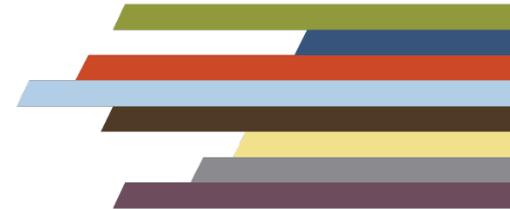
(or what I like to call, "Things to Consider") Most of this is guided by anecdotal experience

- Most people start to burnout after a 4 hour session
- If it's more than 2 hours, you really need to throw a break in there OR let people take 'bio' breaks as needed
- Best times of day to train?
- If you don't want to cut on content, try making it a multi-day training OR assign pre-work!
- If you have an external tool you plan to use, make sure you test it first!



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General Steps to Transition In-Person to Online Training

1. Create a detailed, daily agenda of your in-person curriculum
 - a. See sample agenda for what the goal is
2. If you have a full-day (6+ hrs) or multi-day training, see how you can spread this out to avoid Zoom fatigue/burnout
3. Identify readings, tasks, general work that can be assigned as pre-work to adjust your time
 - a. There are multiple ways you can have participants submit work to account for CEUs (if that is a concern)
4. Identify areas that are intended for group/partner/interactive work
 - a. Try to find the best engagement tool that can mimic the in-person activity

