



Checklist

BEFORE STARTING A SESSION

1. **Let others in your office space know you are entering a Zoom session.**
 - a. Have a specific person in your office identified to contact you via phone or by knocking on your door if an emergency occurs and you need assistance

2. **Place a sign on your door stating, "Do not disturb in a Zoom session".**

3. **Silence your phone and turn off e-mail.**

4. **Make sure you are able to see a clock.**

5. **If you are going to share your screen or share from the EHR, open and make sure only your client's information is visible (minimize on screen).**

6. **Log onto the Zoom.**
 - a. Click onto Start with Video (upper right corner – orange).

7. **Invite the client to the session**
 - a. Hover at the bottom of the screen and click on "INVITE".
 - b. Choose to invite by default email or by *providing the client the 9-digit meeting number located at the top of the main screen.*

8. **Adjust your camera to a position which is appealing.**
 - a. Make sure lighting is good.
 - b. Test your microphone and sound.

9. **When the client logs on a bell will sound.**
 - a. Make sure your client can hear you and you can hear your client.
 - b. Problem solve and make any needed adjustments.

CONDUCTING THE SESSION

1. Where are you today (address/location)? If we should get disconnected, what number should I use to reach you?

2. Is anyone else there with you?
 - a. If no, begin **session**.
 - b. If yes, who is there with you today?

3. Do you want to continue the session with _____ there with you?
 - a. If no, end session.
 - b. If yes, can we identify a word you can say to me that means to end the conversation "safe word"?

ENDING THE SESSION

1. If the session is complete, hover at the bottom of the screen and click on "END MEETING" (lower right of the screen in **red**).

2. New box appears
 - a. Click on "END MEETING FOR ALL" (lower left in **blue**).

3. Last box appears
 - a. Click on down arrow next to name, and click "EXIT".

4. Take off and unplug headset.

5. Remove "Do not disturb" sign from your door.

6. Let others in your office space know you are off Zoom.