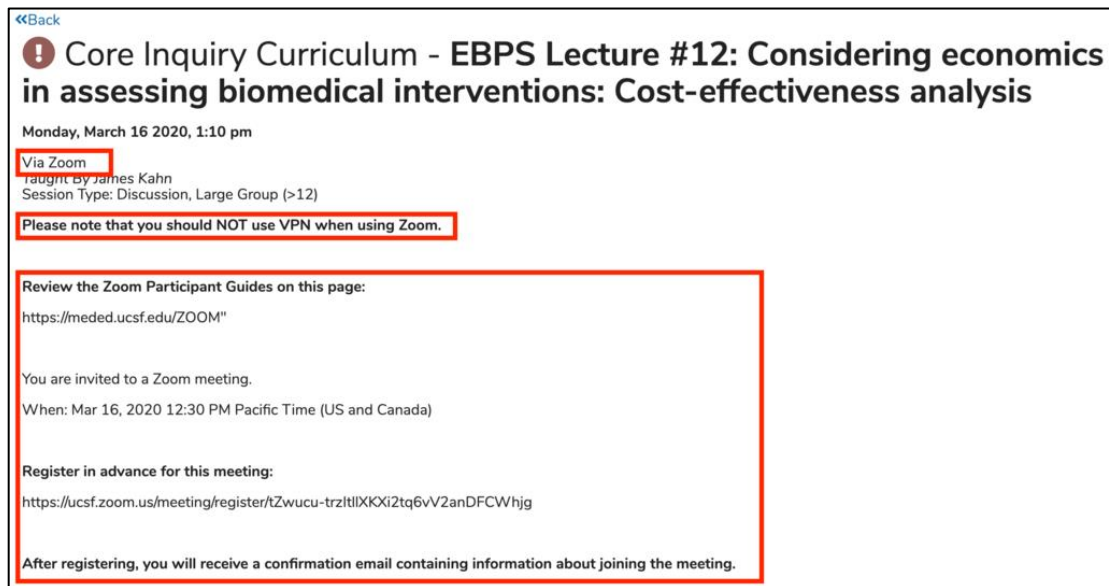


# Pre-Session Checklist for Conducting Live Lectures Using Zoom

## CHECK ZOOM MEETING SETTINGS & INFO

- Check your [Zoom meeting settings](#) and revise them as needed
- Correctly add Zoom meeting information to the Ilios session page (see example below). Include all Zoom invitation details (e.g., Zoom call-in phone, etc.):



The screenshot shows a Zoom meeting invitation page. At the top, there is a back arrow and the text 'Core Inquiry Curriculum - EBPS Lecture #12: Considering economics in assessing biomedical interventions: Cost-effectiveness analysis'. Below this, the date and time are listed as 'Monday, March 16 2020, 1:10 pm'. A red box highlights the 'Via Zoom' text. Below that, it says 'taught by James Kahn' and 'Session Type: Discussion, Large Group (>12)'. Another red box highlights a note: 'Please note that you should NOT use VPN when using Zoom.' Below this, there is a section titled 'Review the Zoom Participant Guides on this page:' with a link to 'https://meded.ucsf.edu/ZOOM/'. Further down, it says 'You are invited to a Zoom meeting.' and 'When: Mar 16, 2020 12:30 PM Pacific Time (US and Canada)'. There is a section for 'Register in advance for this meeting:' with a link to 'https://ucsf.zoom.us/meeting/register/tZwucu-trztlIXKXi2tq6vV2anDFCW/hjg'. At the bottom, it says 'After registering, you will receive a confirmation email containing information about joining the meeting.'

## ESTABLISH FACILITATOR ROLES & PREPARE MEETING

- Start the Zoom meeting at least 30 minutes early
- Once your hosts, co-hosts, and speaking participants have joined the meeting, on the bottom-right corner, click **More**, then click **Lock Meeting** (to prevent students from entering early) so you can check your meeting settings and rehearse. Consider making speaking participants co-hosts so they can unmute themselves.
- Make sure the host and co-host roles are correct (a host can assign/remove co-host roles)
- Decide who will record (the host and all co-hosts can record, so have at least two people record just in case). Recordings are saved to a host's or co-host's computer after the meeting ends (they require a few minutes to process).
- Set up a private communication channel for facilitator coordination (e.g., Slack, email, Zoom private messages, phone text messages) and plan how to handle student questions
- Confirm that the presenter can share their screen and any presentation tools (i.e. PowerPoint). If the presenter is sharing audio from a video or other item, the "Share computer audio" box must be checked.
- Click **Mute All** before the meeting begins and un-check **Allow participants to unmute themselves** (hosts and co-hosts can unmute any meeting participant during the meeting)

- If any of your speakers are presenting from a Zoom-enabled room on campus, make sure the room's built-in audio and video are not muted, and make sure they're unmuted in Zoom
- Unlock the meeting (click **More** on the bottom-right corner when all facilitators are ready, then click **Unlock Meeting**), then click **Record** as soon as the meeting starts

## ADDRESS STUDENT QUESTIONS

- Decide when student questions and comments will be addressed (e.g., at pre-designated intervals, at the mid-way point and end of the lecture, or as needed throughout the lecture)
- Decide whether students can share their audio and video to ask questions and make comments, or if they can only use chat
- Communicate the question moderation process to students clearly (e.g., make a verbal announcement, post a message in chat, add a PowerPoint slide with house-keeping info)  
Example you can copy-paste into chat or put in a PowerPoint slide:
  - Please do not be on VPN while on Zoom
  - I (ZOOM FACILITATOR NAME) will be managing Chat, so feel free to post your questions to "Everyone" or to me privately. I will interrupt the speakers intermittently to ask your questions.
  - Please add a question mark in front of your questions: Example: "? What time is it?"
  - Any questions that we don't have time to answer during this session, we will answer as a forum post afterwards.
  - Please feel free to email (FACULTY PRESENTER NAME AND EMAIL) any questions you have about the lecture material.
- Participants don't see any chat messages that were posted before they joined, so it is helpful to re-post house-keeping messages periodically, especially when you see more students join (keep your eye on the number at the top of the participant list)
- In consideration of FERPA, do not use personal student information during a recorded session. (Small Groups generally will not be recorded.)

## FOR INFORMATION AND SUPPORT

For 24-hour technical support, contact Information Technology (IT) Service Desk [online](#) or by phone at 415-514-4100.

To learn more about ZOOM, contact Educational Technology Services (ETS) at [edtech@ucsf.edu](mailto:edtech@ucsf.edu) or 415-476-4310.

For consultations on using ZOOM in educational projects and for complex meetings, contact iROCKET at [iROCKET@ucsf.edu](mailto:iROCKET@ucsf.edu) or 415-502-2800 to learn more.