Best Practices for Chat in Zoom

Use this guide to help you determine how to use Zoom Chat effectively in your session. This guide is focused mainly on large group sessions.

Before the session

1. Review TEE's Zoom guides if needed (https://meded.ucsf.edu/ZOOM) to learn how to facilitate Zoom meetings
2. Determine Session Norms/Expectations/Etiquette among key faculty in advance:
   a. Designate a Chat Moderator, preferably with content expertise
   b. Decide how participants will interact with faculty:
      i. Plan for the host to adjust chat settings at the beginning of the meeting to allow participants to chat with the host (and cohosts) only. See Controlling and disabling in-meeting chat to learn more. Have a plan for communicating how Chat will work with participants.
      ii. Other options that can be used alone or in combination:
         1. Ask questions where participants can respond using "reaction" emojis
         2. Use the "raise hand" feature where the Chat Moderator chooses who to call on (and lowers hands once done)
         3. Utilize Zoom Polls or Poll Everywhere
      iii. Note: It is rare that students will unmute their audio and talk in large group sessions (more likely in small group sessions)
   c. Determine how chat moderation will work in advance:
      i. Decide whether presenting faculty will:
         1. Build pauses into the session to ask if there are any questions/comments from Chat Moderator; and/or
         2. Allow for the Chat Moderator to verbally interject as major themes arise in the questions/comments
      ii. Consider posting key content questions not addressed from Chat in MS Teams after the session and share this info with students.
      iii. All meeting participants, including students, are able to save the Chat in the lectures in the Bridges Curriculum.
         1. This feature allows participants to manually save a chat txt file locally to their computer. It captures the chats that are visible to the person saving the file. Therefore, we suggest that the Chat Moderator saves the file.
3. Add a Session Norms/Expectations/Etiquette PowerPoint slide to the beginning of the presentation and the course/block's first lecture (example slides):
   a. Add pre-determined (or collaboratively-determined) session norms for how students can/should interact with the presenter(s), the Chat Moderator, and other students
   b. To keep the session focused, consider adding: "Please use Chat only for content clarification during the lecture. For other issues and concerns, please email the course directors directly."

During the session

1. Configure chat at the start so that <u>all chat posts go directly to the Chat Moderator</u> to avoid student and moderator overload:
   a. To change this functionality so students can only send a chat message to the Chat Moderator, the meeting host (or a cohost) needs to change the chat setting at the start of each session to "Host only" (click the ellipses in the Chat window)
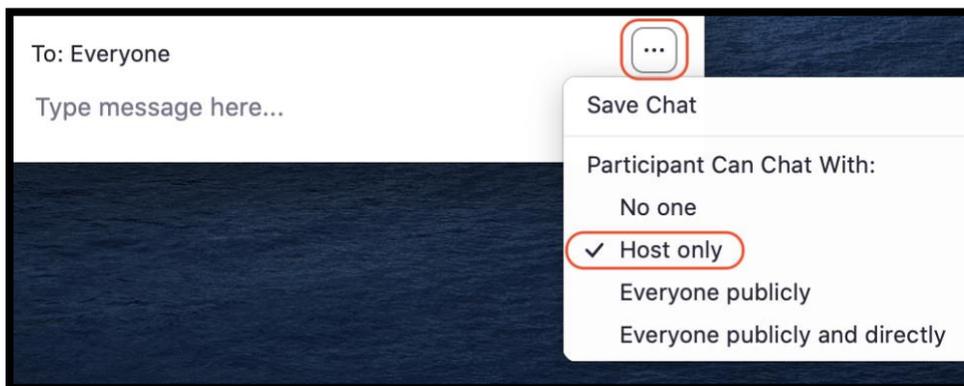
   b. Grant the Chat Moderator the "Host" or "Co-host" role so the questions and comments from students will only be visible to the Chat Moderator. Participants can send a Direct Message to any Host or Co-host (and that message will only be visible to that particular Host or Co-ho
   c. Rename the individual in the chat moderator role by appending "Chat Moderator" to their display name
   d. Encourage participants to add a "?" in front of questions in chat so the Chat Moderator (host/cohost) can easily identify questions
2. Post Session Norms/Expectations/Etiquette into the Chat to start the session, along with the Chat Moderator's self-intro and welcome message to participants
   a. This message may need to be posted several times during the meeting in Chat because latecomers cannot see chat messages posted before they joined the meeting
3. Briefly cover key points in Session Norms/Expectations/Etiquette PowerPoint slide before starting lecture
4. If you plan to reference a Chat file afterward, click on Chat while still in the meeting. At the bottom of the chat window, click the ellipses (…), then **Save Chat**. This will save your chat to your local recording location.

After the session

1. Consider posting key content questions not addressed in the course channel on MS Teams after the session.
2. Learn more about <u>how to save Chat</u> for later reference.
   a. Find your chat text file by searching for the Zoom recording folder on your computer (Macs: Use Finder, PCs: Use Search tool).
   b. Do not share out any private information, including names, related to the chat content.

Support

Please contact TEE for a consultation for complex lectures: iROCKET@ucsf.edu

Resources

https://meded.ucsf.edu/remote_learning