## **Best Practices – Remote Examiners and Zoom Outbound Calls**

### **Overview**

This document is for psych examiners who schedule Zoom remote exams. Included in the document are specific recommendations for the Zoom account settings, scheduling the meeting, and during the meeting.

### **Zoom Account Settings**

#### Waiting Room

Go to **Settings** > **Security** in your Zoom account and turn on the **Waiting Room** by clicking on the toggle to turn it on (blue). This will allow the host to admit each person in the examination and prevents any uninvited participants.

| Profile           | Q. Search Settinge  |  |
|-------------------|---|--|
| Meetings          |   |  |
| Webmare           | General Meeting Recording Calendar Audio Conferencing Collaboration Devices Whiteboard  |  |
| Personal Contacts |   |  |
| Whiteboards       | Security Security   |  |
| Surveys (         | Schedule Meeting  |  |
|                   | In Mosting (Basio) Require that all meetings are secured with one acountry option   |  |
| Recordinge        | Require that all meetings are secured with one of the following security options: a passoode, Waiting<br>In Meeting (Advanced) Room, or 'Only authenticated users can join meetings', if no security option is enabled. Zoom will |  |
|                   | Ernel Noticerion  |  |
| Reports           | One   |  |
| Account Prefile   | Uner Walting Room   |  |
|                   | When participants join a meeting, place them in a waiting room and require the heat to admit them<br>Individually. Enabling the waiting room externatically disables the wetting for allowing participants to<br>pin before heat. |  |
| Video Tutoriala   | Waiting Room Options  |  |
|                   | The options you select here apply to meetings hosted by users who turned 'Waiting Room' on  |  |
| Knowledge Base    | <ul> <li>Everyone will go in the weiting room</li> </ul>  |  |
|                   | <ul> <li>People in the weiting room are sorted by join order</li> </ul>   |  |
|                   | Edit Options: Customize Weiting Room  |  |

#### Do Not Allow live streaming of Meetings

Go to **Settings** > **In Meeting (Advanced)** in your Zoom account and **Do Not Allow live streaming of meetings** by clicking on the toggle and turning it off (gray). The participants will not be able to stream video over the internet.



Disable remote control and remote support for guests in a meeting

Go to Settings > In Meeting (Basic) and enable Disable remote control and remote support for guests in a meeting by clicking on the toggle to turn it on (blue). When this is turned on, users will not be able to give remote control to any external participant.

| Profile           |                       | Disable screen sharing when guests are in the meeting  |   |
|-------------------|-----------------------|--|---|
| Meetings          | Security              | Guests include users who are not signed in or not in the same account. Participants who dial-in via<br>phone or join with SIP/H.323 devices will still be able to screen share.                              |   |
| Webinare          | Schedule Meeting      | Only IT admin can make changes for this setting ×  |   |
| Personal Contacts | In Meeting (Basic)    |  |   |
| Whiteboards       | In Meeting (Advanced) |  |   |
|                   | Email Notification    | Disable remote control and remote support for guests in a meeting  | - |
| Surveye NEW       | Other                 | Guests include users who are not signed in or not in the same account. When this setting is on, users<br>will not be able to give remote control to an external participant and external participants cannot |   |

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#### Disable the Send files via meeting chat

Go to **Settings** > **In Meeting (Basic)** and **Disable Send files via meeting chat** by clicking on the toggle to turn it off. This will not allow participants to share files in chat during the meeting.

| MINNESOTA<br>JEDREML BRANCH  |   |  |
|--|---|--|
| Profile<br>Meetings  | C, Send files via chest   |  |
| Webinare<br>Personal Contacts<br>Whiteboards<br>Surveys (CC)<br>Recordings<br>Settings | Meeting - In Meeting (Basic)<br>Sand Haa via maating okat<br>Hoate and participante can eard files through the in-meeting chat. |  |

Require a passcode when scheduling a new meeting

Go to **Settings** > **Security** in your Zoom account and turn on **Require a passcode when scheduling a new meeting** by clicking on the toggle to turn it on (blue). This will allow only the persons with full meeting information, the meeting ID and passcode into the examination and prevent uninvited participants.

| MINESTA AND       |                       | The options you asked have apply to making a leasted by users who turned. Waiting fearer an   | 8 |
|-------------------|-----------------------|---|---|
| Profile           |                       | <ul> <li>People in the waiting room are sorted by join order</li> </ul>   |   |
| Meetings          | Security              | Edit Optione Customize Waiting Room   |   |
| Webinara          | Schedule Meeting      |   |   |
| Personal Contacte | In Meeting (Basic)    | Require a passcode when scheduling new meetings   |   |
| Whiteboards       | In Meeting (Advanced) | A pasecode will be generated when scheduling a meeting and participante require the pasecode to<br>join the meeting. The Personal Meeting ID (PMI) meetings are not included. | • |
| Surveya (NEW)     | Email Notification    |   |   |
|                   | Other                 |   | _ |
| Recordinge        |                       | Require a passcode for instant meetings   |   |
| Settinge          |                       | A random passcode will be generated when starting an instant meeting  |   |
| Reports           |                       |   |   |
| Annual Parkin     |                       | Require a pasacode for Personal Meeting ID (PMI)  |   |

### Do not Allow participants to rejoin

Go to **Settings** > **In Meeting (Basic)** and disable **Allow removed participants to rejoin** by clicking on the toggle to turn it off (gray). This will not allow participants to rejoin the meeting after they have been removed.



### Disable Far end camera control

Go to **Settings** > **In Meeting (Advanced)** in your Zoom account and disable **Far end camera control** by clicking on the toggle and turning it off (gray). Participants will not be able to take control of your camera during a meeting.

| Profile           |                       |   |   |
|-------------------|-----------------------|---|---|
| Meetings          | Security              | Sign Language interpretation view   |   |
| Webinare          | Schedule Meeting      | Allow host to assign participants as sign language interpreters who can interpret one language into | 9 |
| Personal Contacts | In Meeting (Basic)    | aign language in real-time. Host can assign interpreters when scheduling or during the meeting. 🕑   |   |
| Whiteboarde       | In Meeting (Advanced) | Far end camera control  |   |
| Surveys NEW       | Email Notification    | Allow another user to take control of your camera during a meeting. Both users (the one requesting  |   |
|                   | Other                 | control and the one giving control) must have this option turned on.                                |   |

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#### Identify guest participants in the meeting /webinar

Go to Settings > In Meeting (Advanced) in your Zoom account and enable Identify guest participants in a meeting by clicking on the toggle and turning it on (blue). 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.

| MINNENTA<br>JUDKAM BEANCH |                       | Fecure Mode<br>A mode that advance antic hearts and non-hearth visions and profile motions advanted a modeling. Fecure Mode                             |  |
|---------------------------|-----------------------|---|--|
| Profile                   |                       | can be found in the "More" menu in the in-meeting toolbar.  |  |
| Meetings                  | Security              |   |  |
| Webinara                  | Schedule Meeting      | Identify guest participants in the meeting/webinar<br>Participants who belong to your account can see that a guest (someone who does not belong to your |  |
| Personal Contacta         | In Meeting (Basic)    | account) is participating in the meeting/webinar. The Participants list indicates which attendees are   |  |
| Whiteboarde               | In Meeting (Advanced) | guests. The guests themselves do not see that they are listed as guests.  |  |
| Surveys (NEW)             | Email Notification    | Auto-answer group in chat   |  |
| Recordinge                | Other                 | Allow user to add others to an 'Auto Answer Group'. Calle from members of a user's 'Auto Answer<br>Group' will be automatically answered for that user. |  |
| Settinge                  |                       |   |  |
| Reports                   |                       | Only show default email when sending email invites  |  |

### **Scheduling a Meeting**

### Do not use the Recurring option or Personal Meetings ID

When scheduling a meeting **Do Not** use the **Recurring option** and **Do Not** use your **Personal Meetings ID**. This will allow the meeting to be more secure and the participants will not be able to join future meetings.

| Profile           | < Back to Meetings |  |
|-------------------|--------------------|--|
| Meetings          |                    |  |
| Webinare          | Schedule Me        | eting  |
| Personal Contacte | Schedule For       | Myself v   |
| Whiteboards       | Topic              | My Meeting   |
| Surveys NEW       |                    |  |
| Recordinge        |                    | + Add Description  |
| Settings          | When               | (☐ 12/11/2023 (12:00 ∨) (PM ∨)                               |
| Reports           | Duration           |  |
| Account Profile   | bulcton            |  |
|                   | Time Zone          | (GMT-6:00) Central Time (US and Canada)                      |
|                   |                    | Recurring meeting  |
| Video Tutorials   |                    |  |
| Knowledge Base    | Registration       | Required   |
|                   | Meeting ID         | • Generate Automatically O Personal Meeting ID 161 9738 4251 |
|                   |                    |  |

### Waiting Room

When scheduling a meeting make sure the Waiting Room box is checked.

| MUNESCIA MANCH    | Time Zone    | (GMT-8:00) Central Time (US and Cenada)                              |
|-------------------|--------------|--|
| Webinare          |              | Recurring meeting  |
| Personal Contacts | Registration | C Required   |
| Whiteboards       | Meeting ID   | Generate Automatically     Personal Meeting ID 161 9738 4251         |
| Surveys (NEW)     | in octing to |  |
| Recordings        | Template     | Select a template  |
| Settings          | Security     | Passcode 723982  |
| Reports           |              | Only users who have the invite link or passcode can join the meeting |
| Account Profile   |              | Waiting Room   |
|                   |              | Only users admitted by the host can join the meeting                 |
|                   |              | Require authentication to join                                       |

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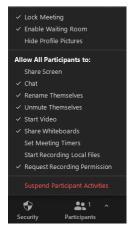
### Do not Allow participants to join

When scheduling a meeting Do Not Allow participants to join anytime by unchecking the box.

| Options | Hide  |
|---------|---|
|         | Allow participants to join anytime                                  |
|         | G8A   |
|         | Mute participants upon entry  |
|         | Breakout Room pre-assign  |
|         | Request permission to unmute participants                           |
|         | Automatically record meeting O On the local computer O In the cloud |
|         | Approve or block entry to users from specific regions/countries     |

### **During the meeting**

After all participants have joined the meeting go to **Security** and check the box next to **Lock Meeting**. This will prevent anyone else from joining the meeting.



### End the meeting

Click End then End Meeting for All. This will securely end the meeting for all.

