

Zoom Tip Sheet

Visit support.zoom.us to find popular topics about Zoom features, training, and support, including [great training videos](#).

We've also created a page for HL7-specific Frequently Asked Questions: [HL7/Zoom FAQs](#)

Install and Download

Get started

You can use Zoom via your web browser or with a desktop client. Using the desktop client is recommended, however, if you are unable to download and install on your computer, you may need to use the Web Client. There are also Mobile apps for use on IOS and Android devices.

Before you can use Zoom with the desktop client, you must install the Zoom software for your device. Start by going to <https://zoom.us/> and on the upper righthand corner of the webpage, click "Sign Up, It's Free". and click DOWNLOAD. Download the Zoom Client for Meetings.

You may be prompted to download and install the desktop client if you try to join a meeting and do not have the client installed.

Get Started For Meeting Hosts

Log in

Zoom Client

1. Once the Zoom Client for Meetings is installed, click the SIGN IN button using the log in ID and password you have been provided.

Web Client

1. Go to <https://zoom.us/signin> and click the SIGN in button on the top right hand of the web page using the log in ID and password you have been provided.

NOTE: [the web client has limited features and functions best on Google Chrome](#).

Schedule a Meeting

Zoom Client

1. Launch the Zoom client application
2. Log in with the assigned user name and password
3. Click on Schedule a Meeting
 - a. Options to consider for your meeting to increase the security
 - i. Require meeting password - the default is No, but you can change to require participants to enter a password before they can join the meeting
 - ii. Enable Waiting Room (under Advanced Options) - if you enable the waiting room, all participants must be admitted by the host
 - iii. Disable "Enable join before host" (under Advanced Options) - to restrict participants from joining the meeting before the host arrives
 - You can identify alternative co-hosts to start the meeting in case you may be late
 - iv. Enable "Only authenticated users can join" (under Advanced Options) - requires users to sign in to Zoom before they can join and can not join as a Guest
 - v. Limit screen sharing to the host

Web Client

1. Go to <https://zoom.us/signin>
2. Log in with the assigned user name and password
3. Click on Schedule a Meeting
4. Add the relevant meeting details and click on SAVE
5. Click on ADD TO CALENDAR or copy the JOIN URL or click on COPY THE INVITATION and send it to attendees through your calendar application

Start or Join a Meeting as a Host

Useful Links for more information

- [Getting started on Windows and Mac](#)
- [System Requirements](#)
- [Download Zoom](#)

Useful Links for more information

- [Zoom Web Client](#)
- [Using Zoom with different browsers](#)
- [Sign in](#)
- [Scheduling a Meeting](#)
- [Start or join a meeting as a Host](#)
- [Join from my browser](#)

Zoom Client

1. Launch the Zoom client
2. Log in with the assigned user name and password
3. If you are hosting a meeting, click MEETINGS
 - a. Under the upcoming tab, select the meeting you want to start.
 - b. Click START
4. If you are joining a meeting, click JOIN
 - a. Enter the meeting ID

Web Client

1. Go to <https://zoom.us/signin>
2. Log in with the assigned user name and password
3. If you are hosting a meeting, click Meetings
 - a. Select the meeting you want to start
 - b. Click START
4. If you are joining a meeting, click JOIN A MEETING
 - a. Enter your meeting ID

NOTE: An option **Join** from your **Browser** may appear automatically. If it does not, select download & run Zoom and it will appear.

Start or Join a Meeting

Zoom Client

1. Launch the Zoom client
2. To host a meeting, click MEETINGS and select the meeting you want to start. Click START.
3. To join a meeting, enter the meeting ID and your display name
4. Select if you want to connect to audio and/or video and click JOIN.

Web Client

1. Go to <https://zoom.us/signin> in your web browser
2. Sign
3. Enter the meeting ID and click JOIN.

Quick Tips

Meeting Controls

Note: not all functions are available on all web browsers, therefore it is recommended that you use the desktop client

Audio

- After joining or starting a meeting, you can choose to join audio by phone or computer.
- To access Mute **or unmute Audio Controls** click the ^ arrow next to **Mute / Unmute**: Allows you to change the microphone and speaker that Zoom is currently using on your computer, leave computer audio, and access the full audio settings.

Video

- You can start your video before or during a meeting by clicking SETTINGS in the Zoom app menu.
- To access Video Controls (click the ^ arrow next to **Start Video / Stop Video**):

Invite and Manage Participants

- During a meeting, click INVITE to send the meeting information to more participants either via email, Zoom Chat, or phone.
- Hosts and co-hosts can control the following features:
 - Mute participants
 - Request that a participant unmutes
 - Stop a participant's video
 - Request that a participant starts their video
 - Prevent participants from screen sharing
 - Rename a participant
 - Put a participant on hold if enabled
 - Choose to play an enter or exit chime
 - Lock the meeting to prevent anyone new from joining -
 - Place participants in waiting room or admit/remove participants from the waiting room (waiting room can only be enabled by the host)

Useful Links for more information

- [Join a Meeting as an Attendee](#)

Useful Links for more information

- [Features available on different web browsers](#)

Useful Links for more information

- [Changing Audio Settings](#)
- [Testing audio](#)

Useful Links for more information

- [Video Settings](#)

Useful Links for more information

- [Managing Participants in a Meeting](#)
- [Host Controls](#)
- [Mute or Unmute All Participants](#)

- Only hosts have access to these features:
 - Give a participant the ability to record locally
 - Make a participant host or co-host
 - Enable waiting room
- Attendees can only view other participants.

Share Screen

- After selecting Share Screen located in your meeting toolbar, you can choose to share your desktop, an individual application/window, or start a whiteboard.
- During your screen share, you can select ANNOTATE to use screen share tools for drawing, pointing, etc.
- Any attendee in the meeting can start annotating on a shared screen.
- If you have limited screen sharing to the host (recommended), you can give a participant the ability to share their screen during the meeting.

Chat

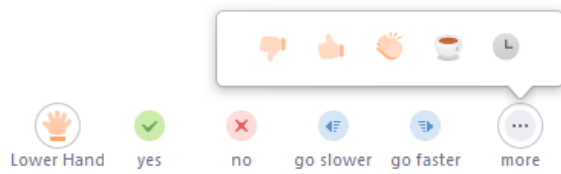
- Click Chat to instant message with other participants while in the meeting.
- In the Chat panel, click the dropdown to select if you want the message to go to everyone in the meeting or a single participant.
- **Chat:** Access the chat window to chat with the participants. Learn more.

Record Meeting

- If you're a host, you can record the meeting
 - Click RECORD in the meeting toolbar.
 - Click the arrow on the Record icon to choose to save the recording to the cloud or to your computer.
- **Note:** The host will need to allow local recordings in their account settings, then give you permission to record. If you don't have permission to record, use the in-meeting chat or audio to ask the host for permission.

Participants List

- The Participants list also gives you access to these options:
 - **Rename:** Hover over your name and click **Rename** to change your screen name displayed to other participants.
 - **Non-verbal feedback icons:** Places an icon beside your name to quickly notify the host.



- **Raise Hand** - When you are using Zoom to participate in a remote meeting, using the "Raise Hand" function is the best way to ensure you have your say without having to interrupt the meeting mid-flow.

Waiting Room

- The Waiting Room feature allows the host to control when a participant joins the meeting.
- As a Host you can enable waiting room and then you can admit attendees one by one or hold all attendees in the waiting room and admit them all at once.
 - You can send all participants to the waiting room when joining your meeting or only guests, participants who are not on your Zoom account or are not signed in.
- For participants joining a meeting, will not be able to join until admitted by the host.
- See next section for removing imposters.

Remove a Participant (aka an Imposter)

- As a host, you can expel a participant (for example, if you get "imposters" logging in" from the participants menu
 - Mouse over a participant's name, and several options will appear, including *Remove*.
 - Click that to kick a participant out of the meeting. They can't rejoin using the same email address.

Locking a meeting

Useful Links for more information

- [Share Screen](#)

Useful Links for more information

- [Chat](#)

Useful Links for more information

- [Local Recordings](#)
- [Finding and Viewing Recordings](#)

Useful Links for more information

- [Nonverbal Feedback During Meetings](#)
- [Providing and Managing Nonverbal Feedback During Meetings](#)

Useful Links for more information

- [Waiting Room](#)

Useful Links for more information

- [Managing Participants](#)

Useful Links for more information

- [Managing Participants](#)

- To lock a meeting (hosts only) once all of your attendees have joined, click on *Participants* at the bottom of your Zoom window.
- Add the other WG co-chairs (suggest at least 2 co-hosts) on the call as co-hosts to help manage situations where someone joins the meeting unexpectedly.
 - To add your co-hosts, go to the same **Settings** icon, then to the **Meetings** tab. Scroll down to **Co-host** and make sure it is enabled. If Zoom asks you for verification, click **Turn On**.
- In the participants pop-up box, you will see a button that says *Lock Meeting*.
- When you lock the meeting, no new participants can join, even if they have the meeting ID and password.
- If you are having issues with "imposters" joining, it is a good idea to lock the meeting after you remove the imposter so no others can join.
- NOTE: When a meeting is locked, no one can join, and you (the host or co-host) will NOT be alerted if anyone tries to join

Other Useful Zoom Features

Polling

- The polling feature for meetings allows you to create single choice or multiple choice polling questions for your meetings.
- You will be able to launch the poll during your meeting and gather the responses from your attendees.
- You also have the ability to download a report of polling after the meeting.
- Polls can also be conducted anonymously, if you do not wish to collect participant information with the poll results.
- You can download the results of a poll after the meeting - assuming that registration was turned on and the poll was not anonymous, it will list participants' names and email addresses.
 - if registration was not turned on, it will show the results, but list the users as "Guest"

Useful Links for more information

- [Polling for Meetings](#)

Meeting Reports

Zoom provides Usage Reports which may be useful to record participants in your meeting minutes:

- Log into Zoom via a browser.
- At the bottom of the left menu, select Reports > Usage
 - Select the date or date range for your meeting and then find the meeting you want participants for
 - Scroll to the right and click on the Participant number - brings up a report that can be viewed or downloaded to Excel:
 - Meeting info, participants and meeting minutes within a specified time range

Useful Links for more information

- [Zoom Reports](#)

Additional Resources and Support

- For more about Zoom features, training, and support, visit support.zoom.us
- Search by your specific need or view popular topics and one-minute video introductions