VIRTUAL COMMUNICATIONS GUIDE
For Service Providers and Volunteers

The purpose of this guide is to help service providers and volunteers determine which virtual communication channels are best for them and their clients. Use the introduction pages to learn about the options and select the best one. Then, navigate to the guide for that channel in order to enable it for yourself. Finally, share the how-to guide with your client and interpreters.

Virtual Communication Options

Below are a set of options for virtual communication that take into consideration varying levels of technology access and digital literacy. *If you are already using virtual options that are not on this list but are working for you, please keep using them!*

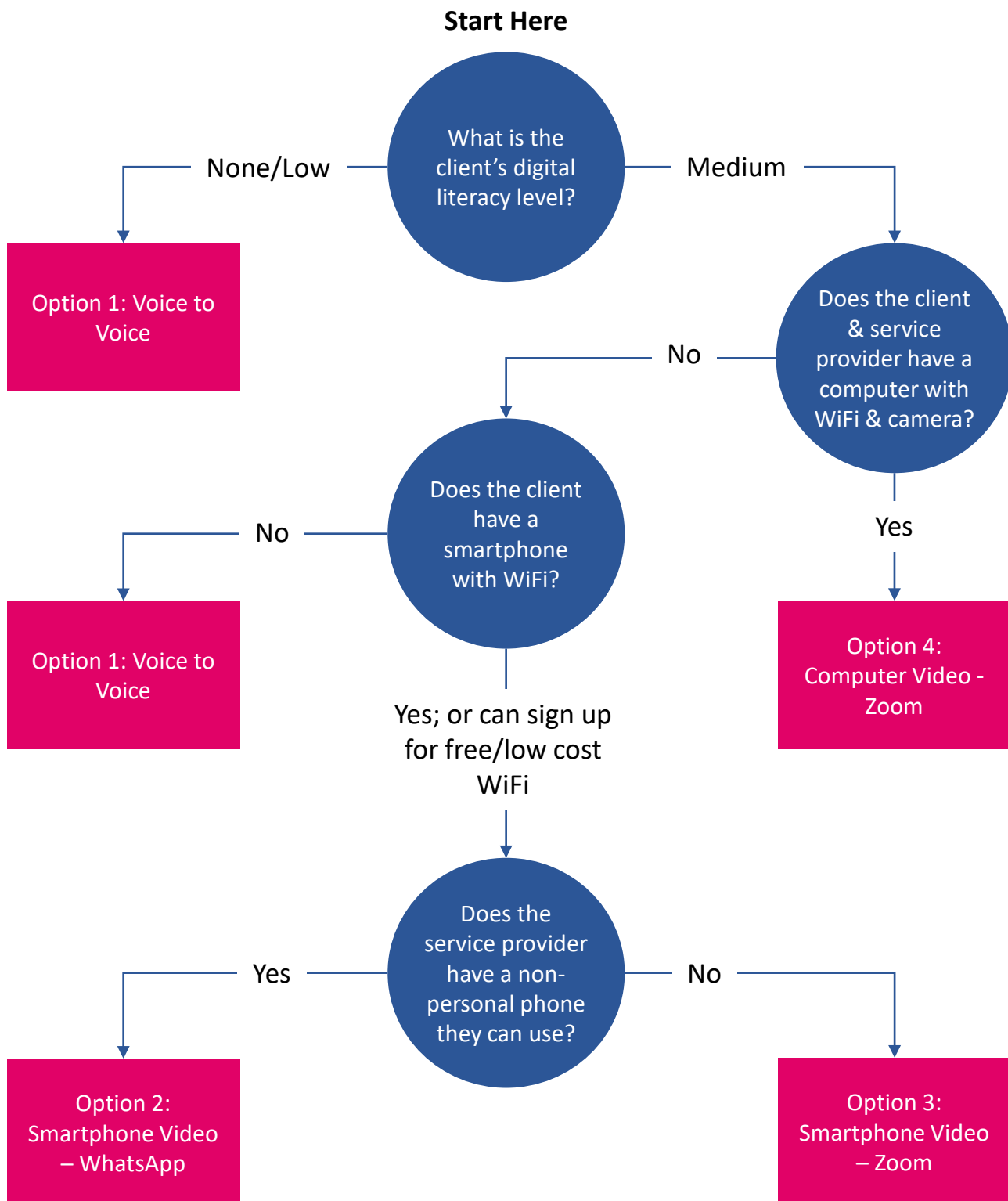|	Voice to Voice	Smartphone Video - WhatsApp	Smartphone Video - ZOOM	Computer Video - ZOOM
Description	Clients use any cellphone or landline to connect with service providers and volunteers through a phone call	Clients use WhatsApp on their smartphone to message, voice and video chat with service providers and volunteers	Clients use Zoom on their phone to video chat and share screen with service providers and volunteers who use their computer	Clients use Zoom on their computer to video chat and share screen with service providers and volunteers
Best Use	For clients without broadband or cellular access, or who are uncomfortable using technology	WhatsApp lets you text, video chat and send audio recordings at any time, but it shares the phone number you use to register	Zoom lets you schedule meetings to video chat, share your screen, and doesn't share your phone number	For clients with reliable broadband or cellular access; Zoom video and screen share are easier to use on a computer
Device	Any cell or landline	Smartphone with WiFi	Smartphone with WiFi	Computer with WiFi and camera
App Required	N/A	WhatsApp (Free)	Zoom (Free)	Zoom (Free)
Digital Literacy Required	Any	Medium	Medium	Medium

Note: if your client has data but no WiFi, you might find the video does not work as well and might be frustrating.

Note: if your client is going to use Zoom on their smartphone, you as the service provider or volunteer can use Zoom on either your smartphone or computer.

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Determining the Best Option

Use the questions below to determine which option is best for you and your client. Be sure to consider needs of other participants, like interpreters.

Start Here

What is the client's digital literacy level?

None/Low → **Option 1: Voice to Voice**

Medium → Does the client & service provider have a computer with WiFi & camera?

No → Does the client have a smartphone with WiFi?

Yes → **Option 4: Computer Video - Zoom**

Does the client have a smartphone with WiFi?

No → **Option 1: Voice to Voice**

Yes; or can sign up for free/low cost WiFi → Does the service provider have a non-personal phone they can use?

Yes → **Option 2: Smartphone Video – WhatsApp**

No → **Option 3: Smartphone Video – Zoom**

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Virtual Communication Etiquette and Best Practices

For service providers, volunteers and interpreters:

- Like all of us, clients might be stuck inside with many other people and may be distracted during a voice call. Help them find a quiet place to talk, and keep the content engaging

- Find a quiet space for yourself as well, or let roommates/family members know you are on a call with a client

- With the absence of physical co-location, use conversation to get to know each other and establish a personal connection

- With virtual channels you'll have less physical cues – check for understanding often

- If sharing video, avoid eating or drinking in front of client

- Be conscious of maintaining confidentiality – if you or the client are taking the call in a crowded space, use chat to share more private topics

- Consider using passwords for Zoom meetings to increase security

- We are all learning through this time together – ask your client what worked well, and what you both can improve for next time in terms of setting up and having virtual communication

For clients:

- Do your best to be on time

- Find a quiet space for yourself to take a call, or let roommates/family members know you are on a call

INTRODUCTION

Using the How To Guide

Now that you have determined the best option for you and your client, navigate to the proper how to guide based on the type of phone or computer you have. Provide your client with a copy of the client guide for your chosen option.

Table of Contents

VOICE TO VOICE

Making a 3 Way Call on an Android
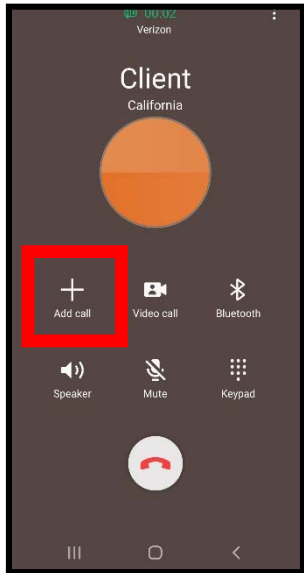
1. Dial the first person. When they have answered, tap **Add Call.**
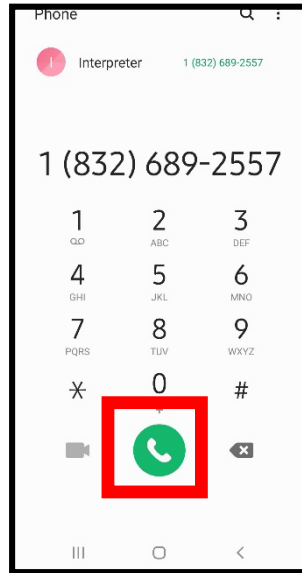
2. Find the second person you want to call in your contacts list**.** Tap the **Dial** icon.
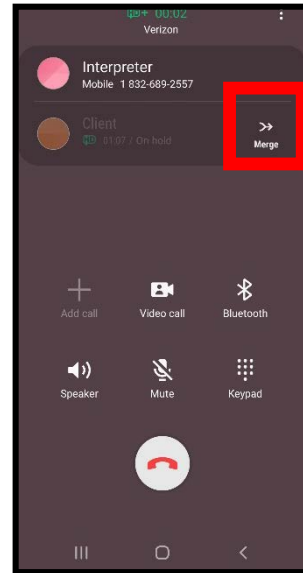
3. Tap the **Merge** icon.
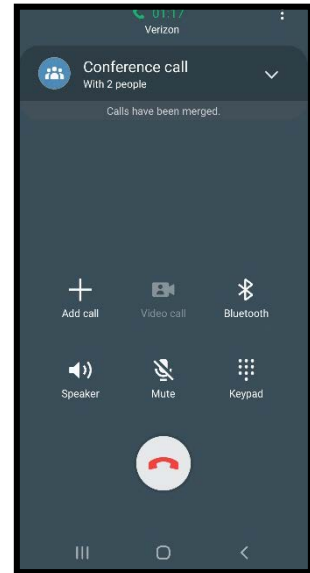
4. You are connected.

Making a 3 Way Call on an iPhone
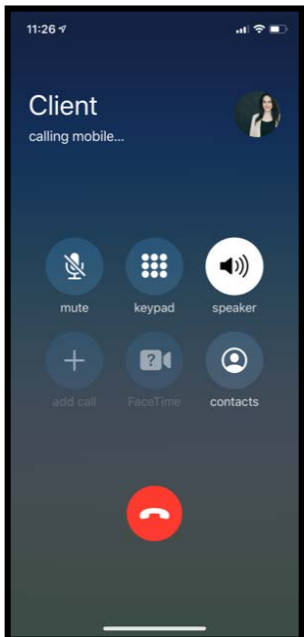
1. Dial the first person. When they have answered, tap **Add Call.**
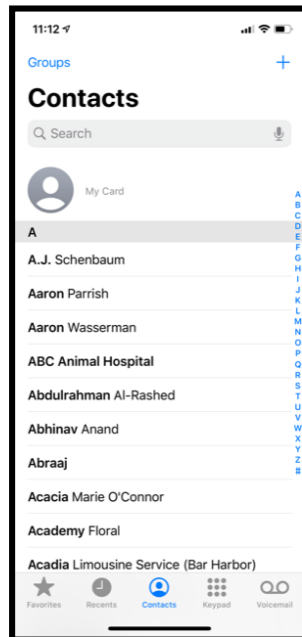
2. Select the second person you want to call in your contacts list.
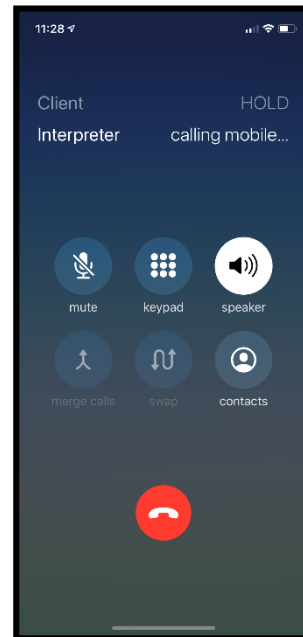
3. Tap the **Merge** icon.
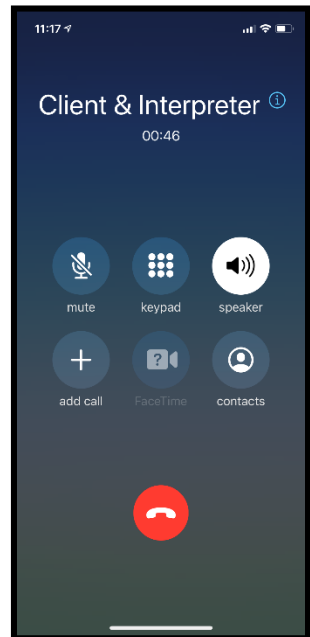
4. You are connected.

Step 1: Download WhatsApp
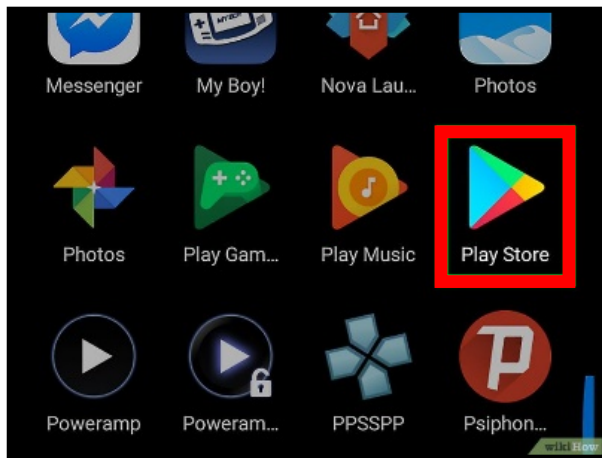
1. Open the Android App Store.
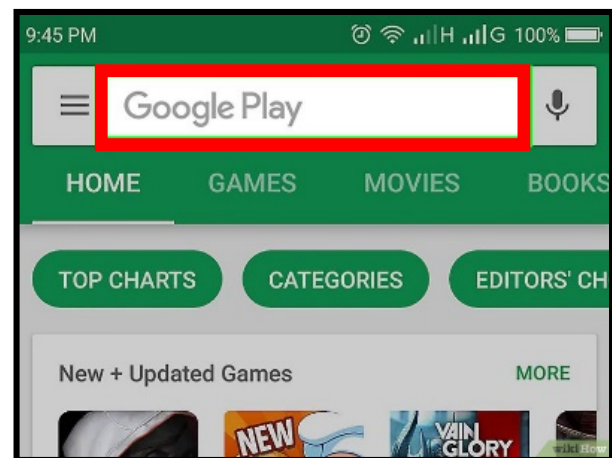
2. Tap the **Search Box**.
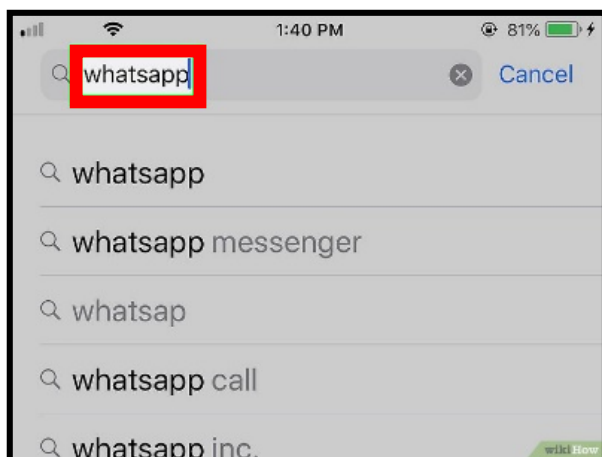
3. Type **Whatsapp.**
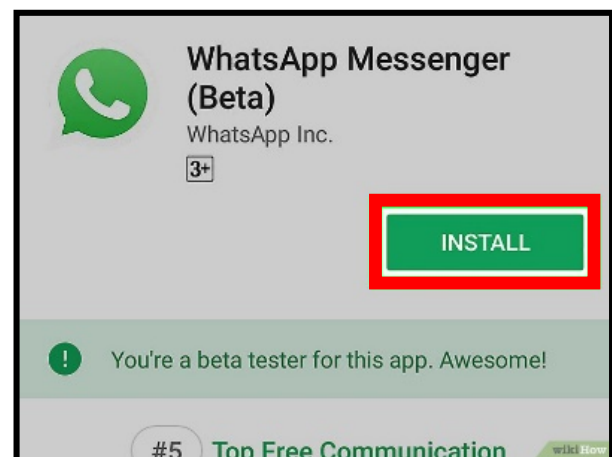
4. Tap **Install**. When app has downloaded, tap **Open**.

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Step 2: Set Up WhatsApp

When you open the app for the first time, you will need to set it up. You will only need to do this upon your first use.
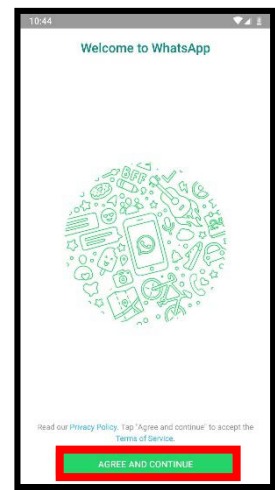
1. Tap **Agree and Continue.**
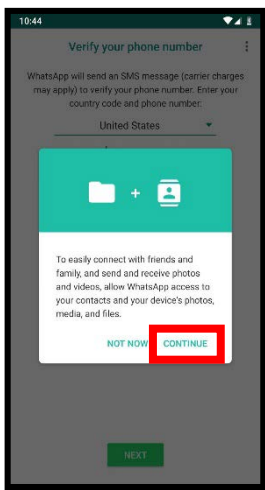
2. Tap **Continue.**
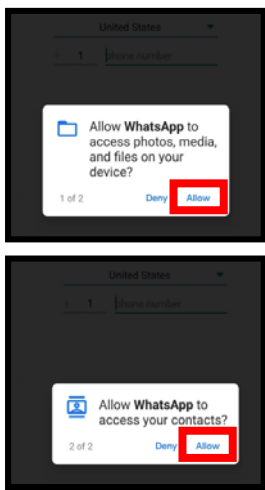
3. Tap **Allow** to give WhatsApp access to photos and contacts**.**
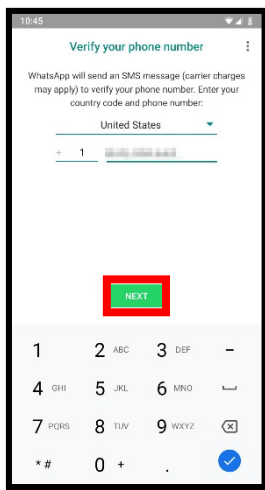
4. Enter your phone number and tap **Next.**
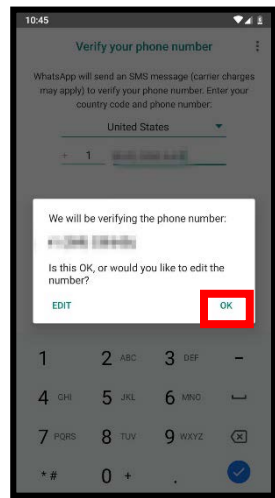
5. Tap **Ok.**
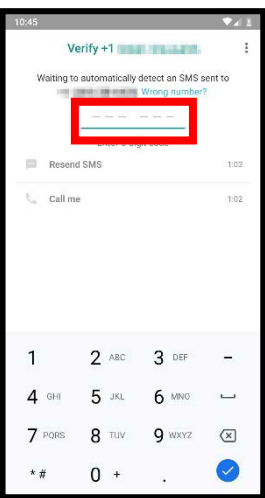
6. You will receive a text message with a code. Enter the code here.
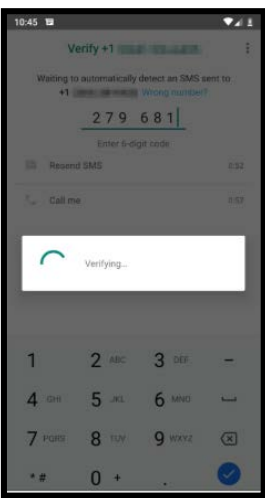
7. The app will verify your code.

8. Type your name and tap **Next.**

Step 3: Adding Contacts

WhatsApp adds the contacts on your phone to the app. To add a contact to your phone, follow these steps. Otherwise, skip to the next section.
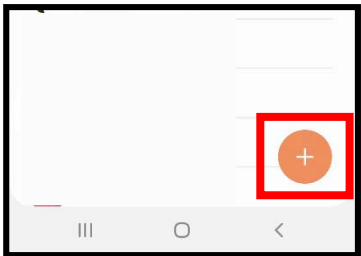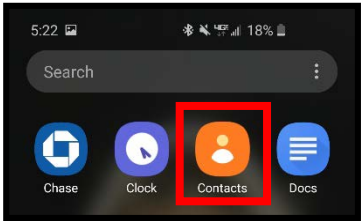
1. Open the **Contacts** app on your phone**.** Then tap the **+** icon to add a contact.
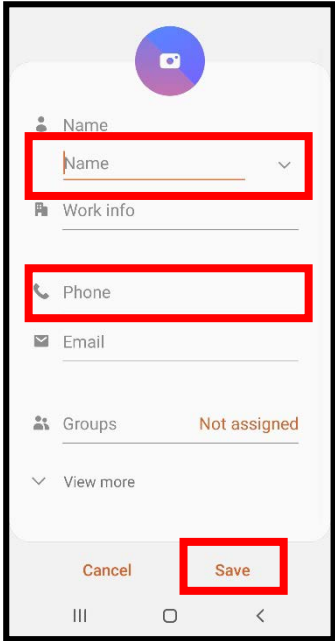
2. Enter the contact's name and phone number, then tap **Save.**

Step 4: Communicating in WhatsApp

Within WhatsApp there are four methods of communication: text chat, voice calls, video calls, and audio recordings. You may choose any of the four you are comfortable with to communicate with your contacts.
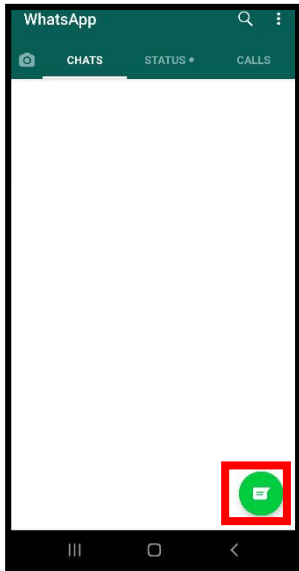
1. Open WhatsApp and tap the new message icon.

2. Scroll to find your contact and tap. Now you are ready to chat.
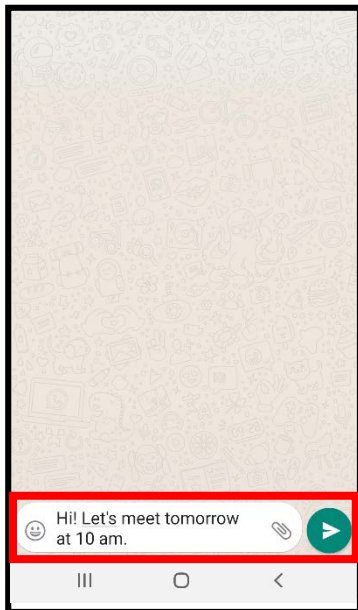
Text Chat	**Voice Call**	**Video Call**	**Voice Recording**

In the chat window, type your message at the bottom of the screen, then tap the arrow to send.
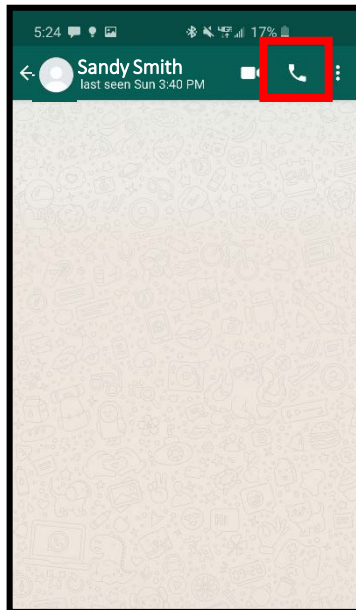
To start a voice call, click on the phone icon.
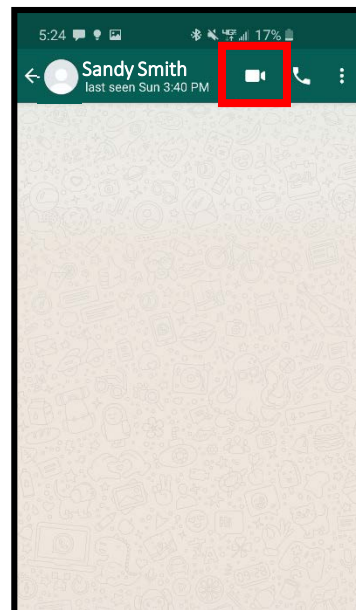
To start a video call, click on the camera icon.
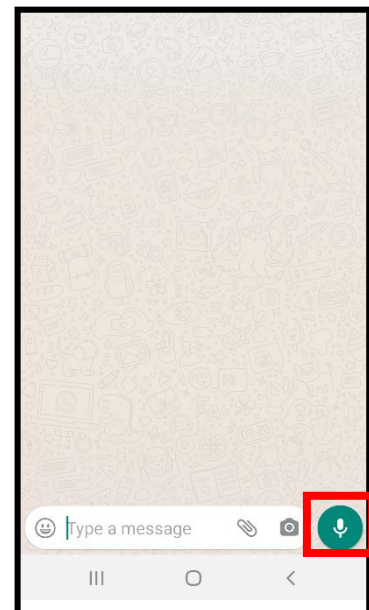
To make an audio recording, hold down the microphone button and speak. Let go when finished.

Step 5: Creating a Conversation with 3 or More Participants

Use this section to start a conversation with multiple parties, such as a client and interpreter. Make sure both have been added as contacts in your phone first.
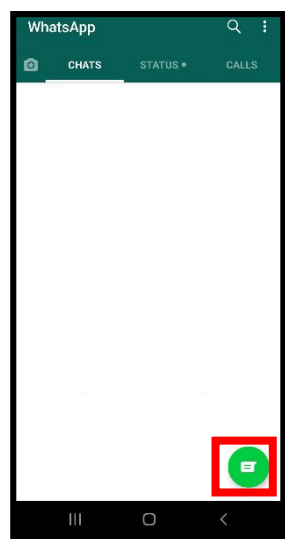
1. Open WhatsApp and tap the new message icon.
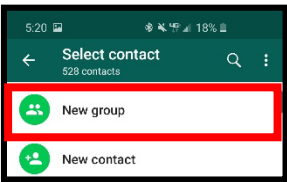
2. Tap **New Group.**
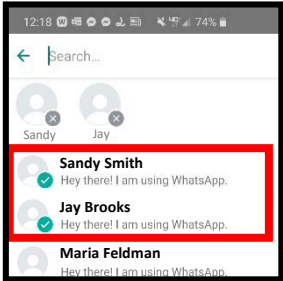
3. Scroll to find the contacts you want to add and tap each one.
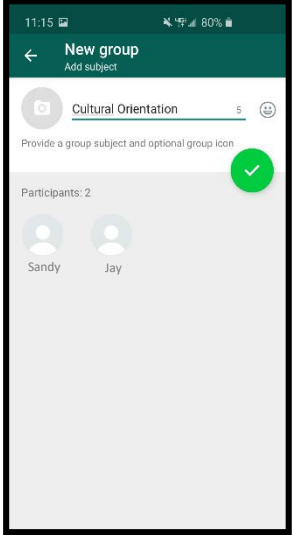
4. Name your group and tap the **green check**.
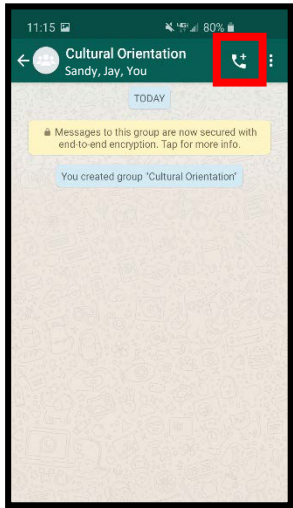
5. Click the **phone icon** to begin a call with the group.
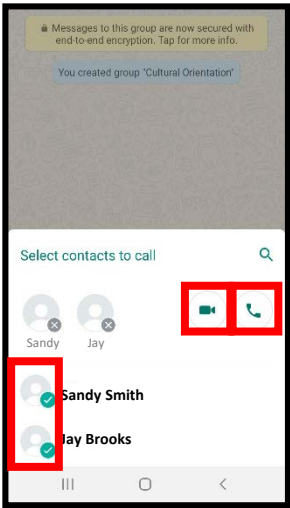
6. Select the participants you want to call. Click the **video icon** for a video call, or the **phone icon** for a voice call.

Changing the Language

WhatsApp will usually follow the language of your phone. To change the language of your phone, follow these steps:
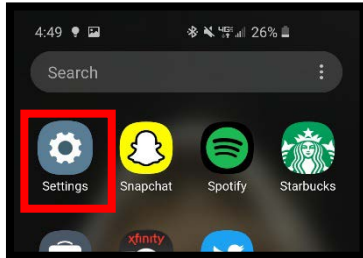
1. Open **Settings.**
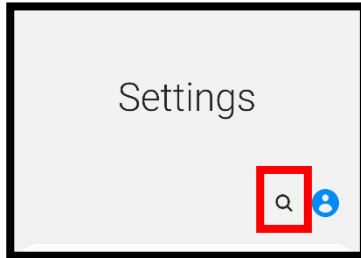
2. Tap the search icon.
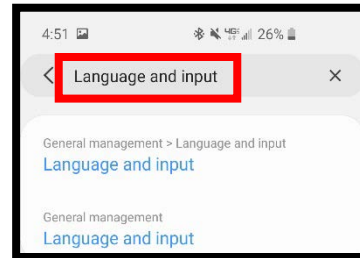
3. Type in **Language and input.**
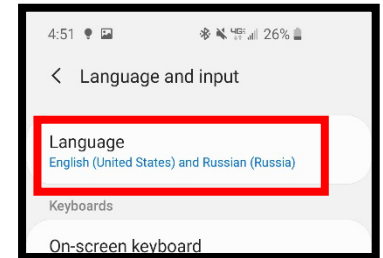
4. Tap on **Language.**
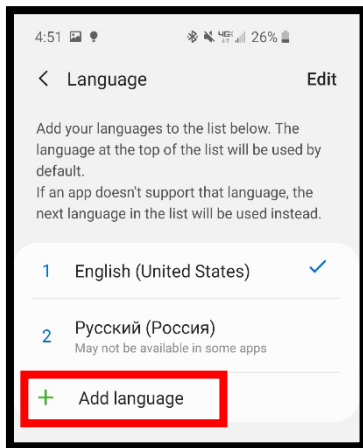
5. Tap **Add language.**
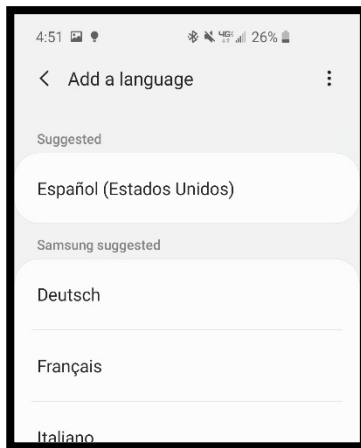
6. Scroll to find desired language and tap on it.
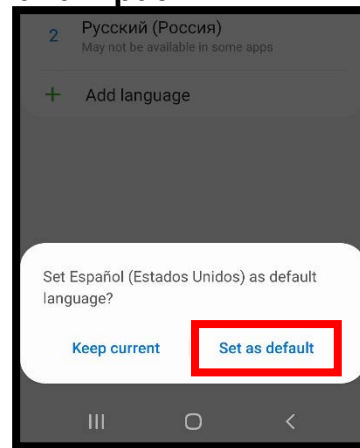
7. Tap **Set as default.**

Additional Resources

How To Videos:
https://www.youtube.com/watch?v=TblDK2VETLk – English
https://www.youtube.com/watch?v=izmMKrzQoZ4 – Spanish
https://www.youtube.com/watch?v=UM1QCwdpT2Q – French
https://www.youtube.com/watch?v=IWNRsqm1jDM – Swahili

WHATSAPP for iPhone Users

Step 1: Download WhatsApp
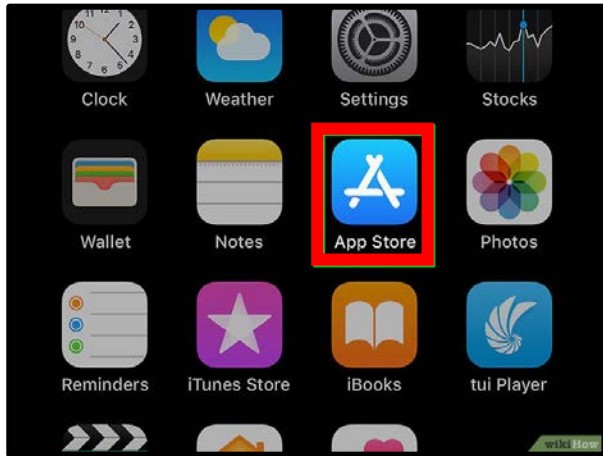
1. Open iPhone App Store.
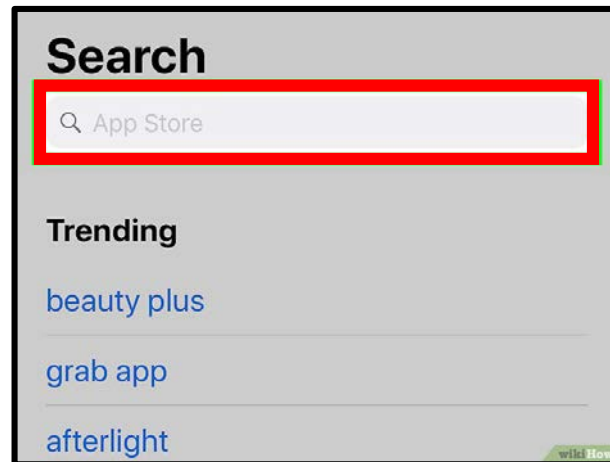
2. Tap **Search**.

3. Type **Whatsapp.**

4. Tap **Install**. When app has downloaded, tap **Open**.

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Step 2: Set Up WhatsApp

When you open the app for the first time, you will need to set it up. You will only need to do this upon your first use.
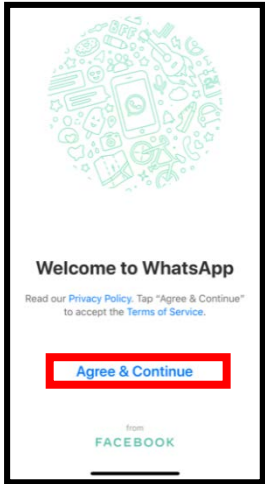
1. Tap **Agree and Continue.**
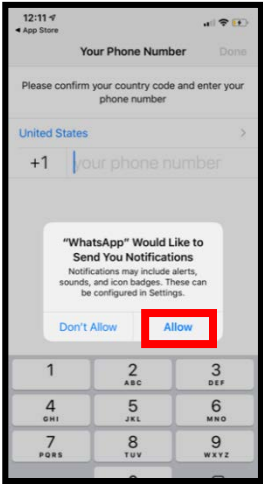
2. Tap **Allow.**
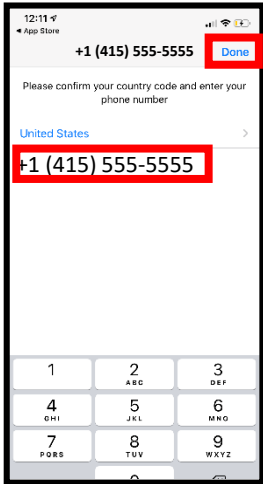
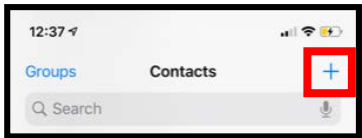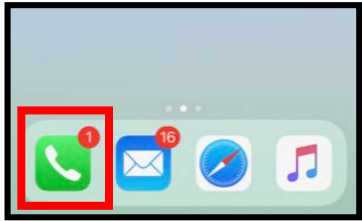3. Enter your phone number and tap **Done**.
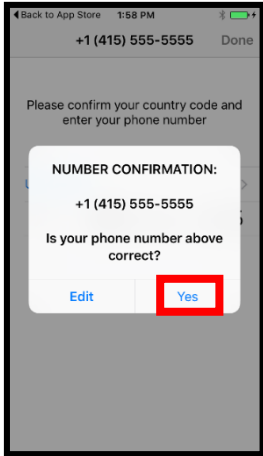
4. Tap **Yes.**
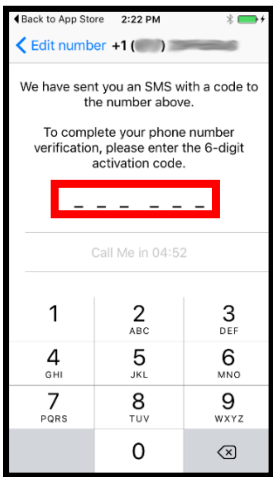
5. You will receive a text message with a code. Enter the code here. The app will verify your code.
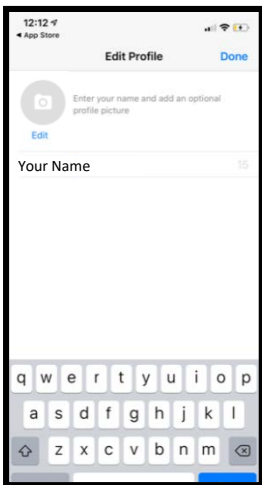
6. Type your name and tap **Done.**

Step 3: Adding Contacts

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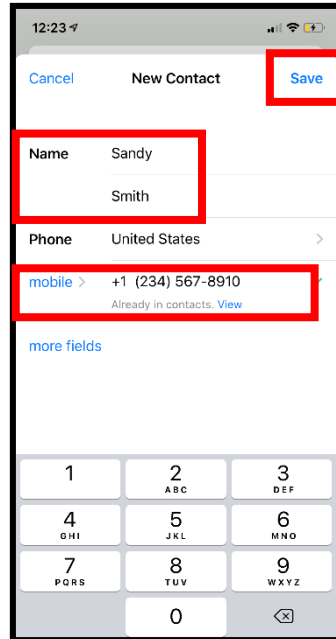
1. Open the **Phone** icon on your phone**.** Then tap the **+** icon to add a contact.

2. Enter the contact's name and phone number, then tap **Save.**

Step 4: Communicating in WhatsApp

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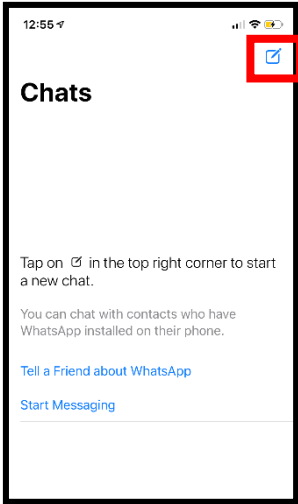
1. Open WhatsApp and tap the new message icon.

2. Scroll to find your contact and tap. Now you are ready to chat.

Text Chat	**Voice Call**	**Video Call**	**Voice Recording**

In the chat window, type your message at the bottom of the screen, then tap the arrow to send.

To start a voice call, click on the phone icon.

To start a video call, click on the camera icon.

To make an audio recording, hold down the microphone button and speak. Let go when finished.

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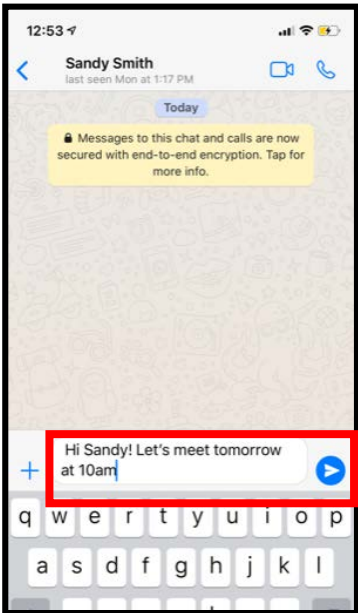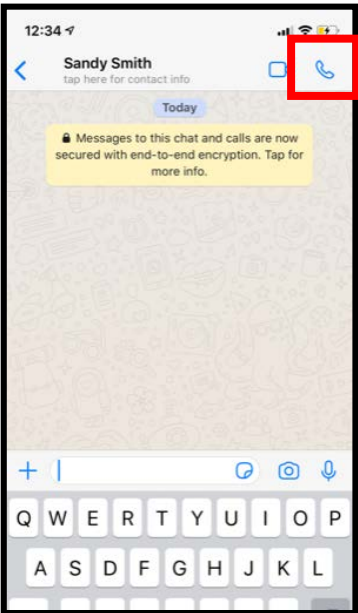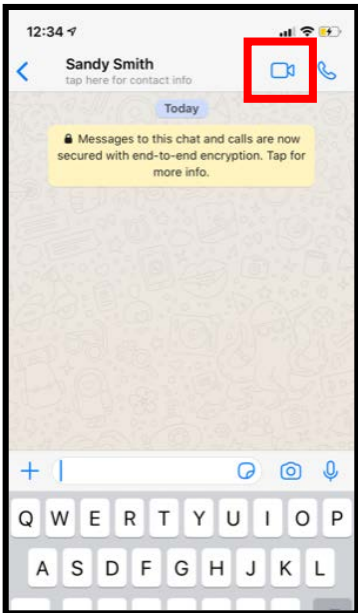
Step 5: Creating a Conversation with 3 or More Participants
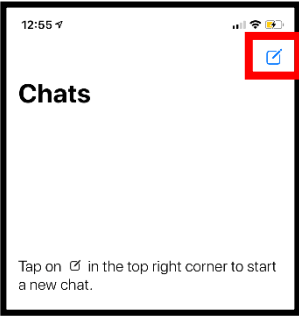
1. Open WhatsApp and tap the **New Message** icon to start a chat.
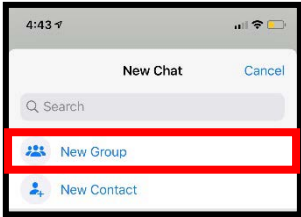
2. Tap **New Group**.
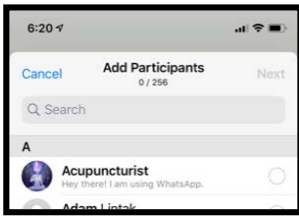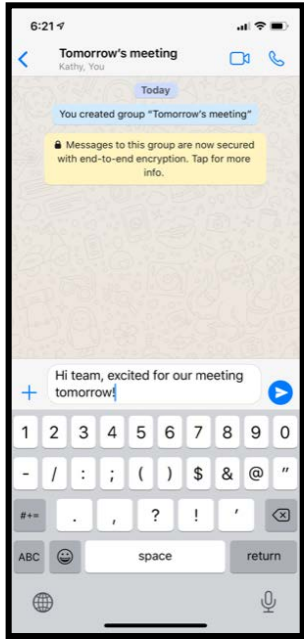
3. Select contacts to add.
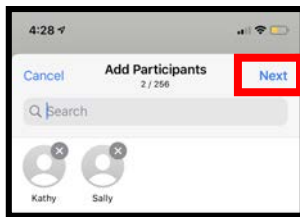
4. Tap **Next**.
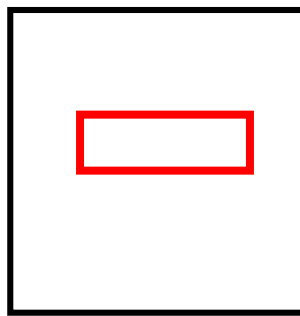
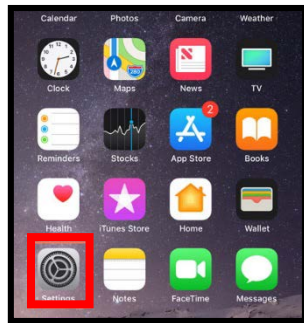5. Type subject for the group.
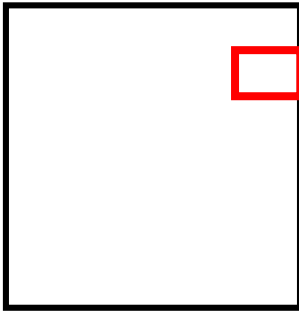
6. Tap **Create**.
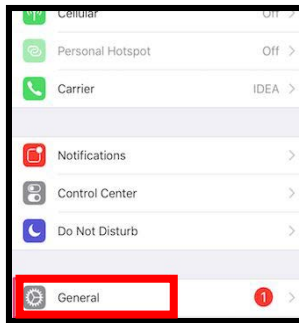
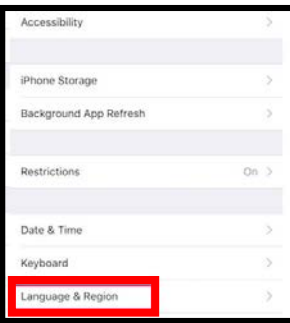7. Type your message and tap the **Send** icon.

Changing the Language

WhatsApp will usually follow the language of your phone. To change the language of your phone, follow these steps:
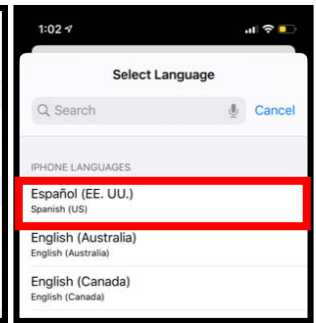

1. Open **Settings.**

2. Tap on **General**.

3. Tap **Language & Region.**

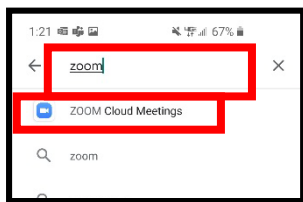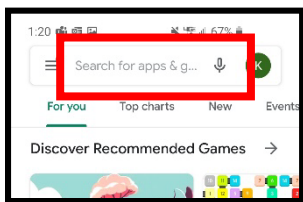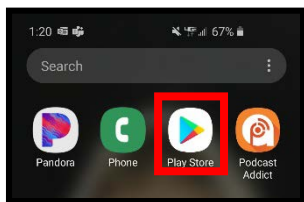4. Tap **Other languages.**

5. Select the desired language.

6. Tap **Change to [your language].**

ZOOM for Android Users

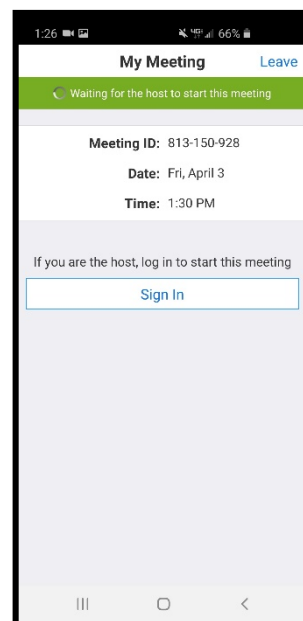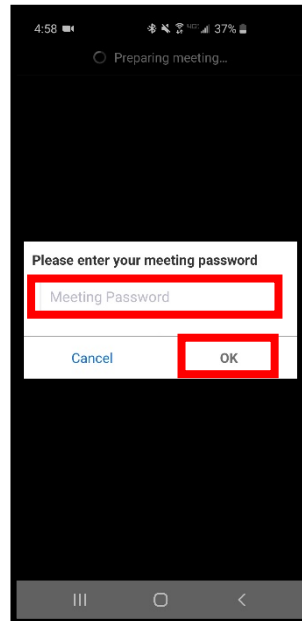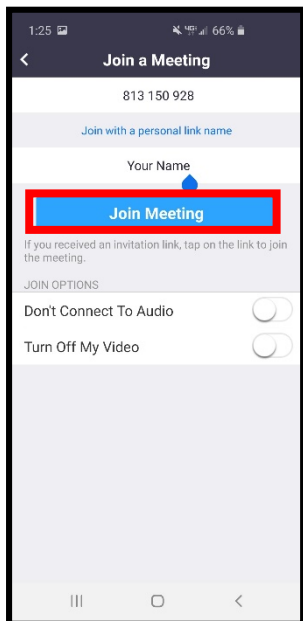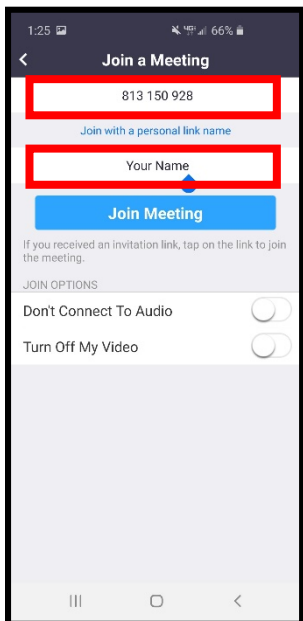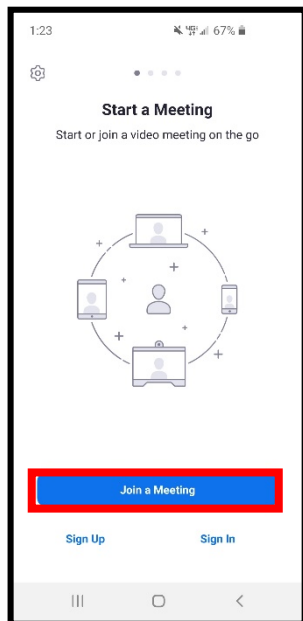This Zoom guide is meant to guide clients in downloading Zoom and joining a meeting. Service providers and volunteers should use the Zoom guide for their computer to create an account and set up meetings.

Step 1: Download Zoom

1. Open the **Play Store.**

2. Select the **search bar.**

3. Type in **Zoom** and tap **Zoom Cloud Meetings.**

4. Tap **Install.**

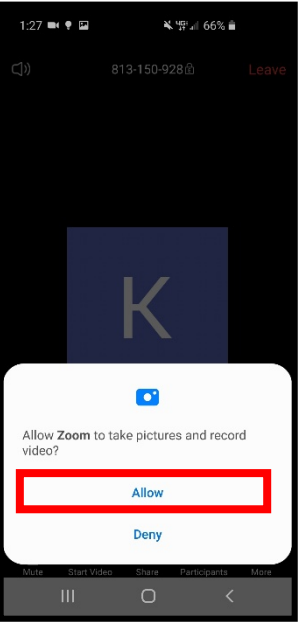5. Once install is complete, tap **Open.**

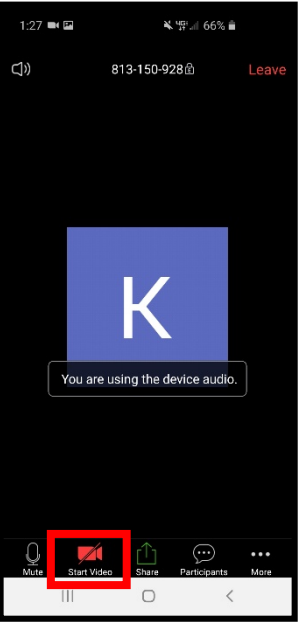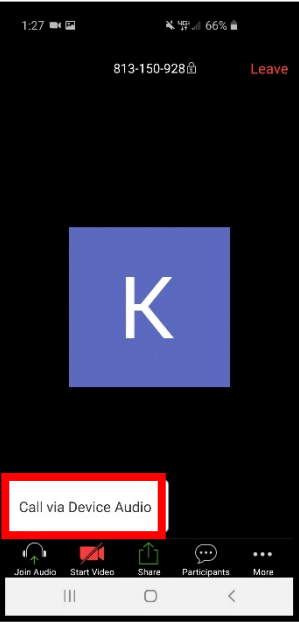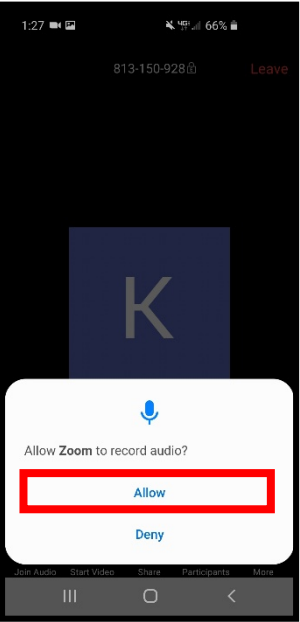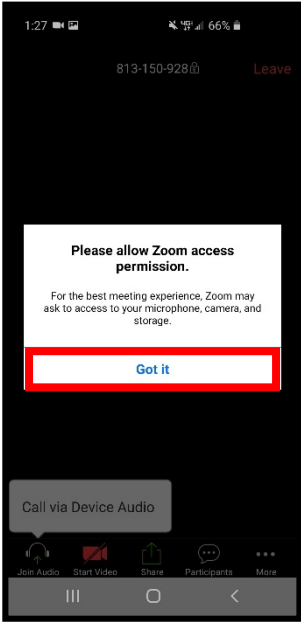## Step 2: Join a Zoom Meeting

1. Open Zoom and tap **Join a Meeting.**

2. Type in the **Meeting ID** and **your name.**

3. Tap **Join Meeting.**

4. If the meeting has a password, enter it and tap **Ok.**

5. If the host has not joined yet, you will see this screen.
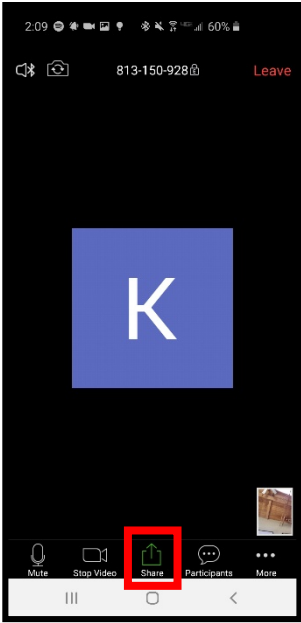
Step 2: Join a Zoom Meeting (Continued)

5. Once the host joins, you will see this screen the first time you join a meeting.
Tap **Got it.**

6. The first time you join a meeting, you will see this screen. Tap **Allow.**

7. Tap **Call via Device Audio.**

8. To start video, tap the **Start Video** icon.

9. The first time you share video, you will see this screen. Tap **Allow.**
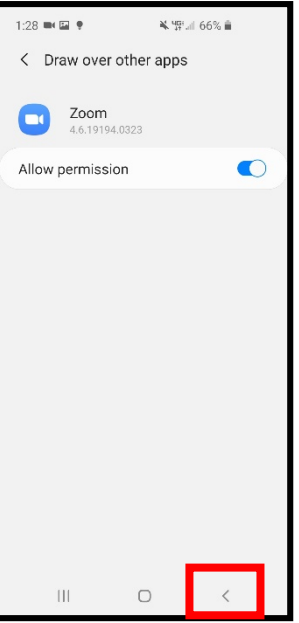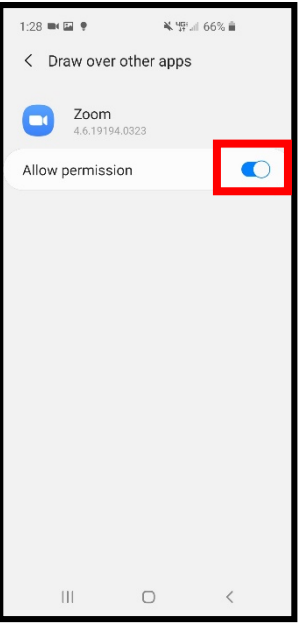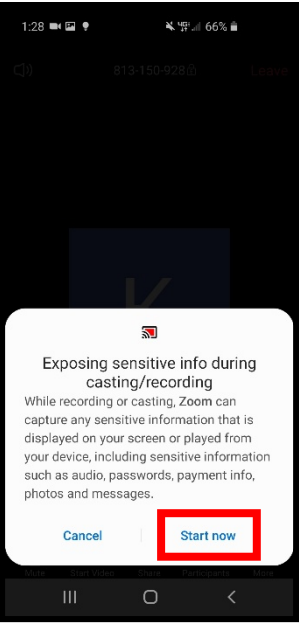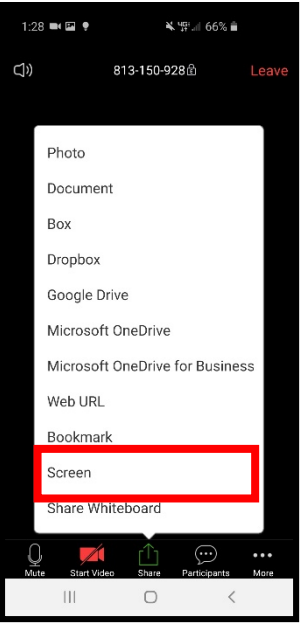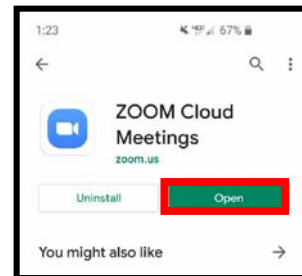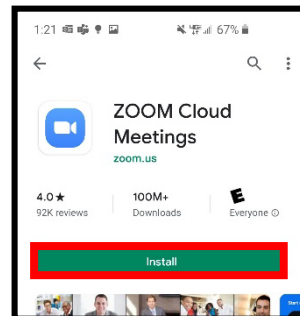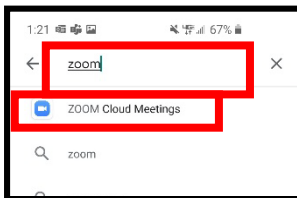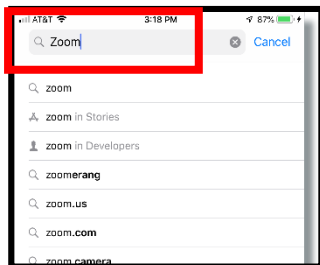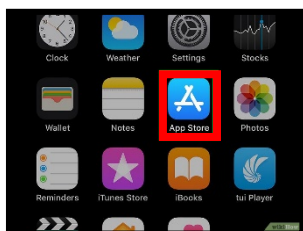
10. To share your screen, tap the **Share** icon.

11. Tap **Screen.**

12. The first time you share screen, you will see this screen. Tap **Start now.**

13. Tap the toggle to allow Zoom to view your screen.

14. Tap the **back** button. You are now ready to share.

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ZOOM for Android Users

This Zoom guide is meant to guide clients in downloading Zoom and joining a meeting. Service providers and volunteers should use the Zoom guide for their computer to create an account and set up meetings.
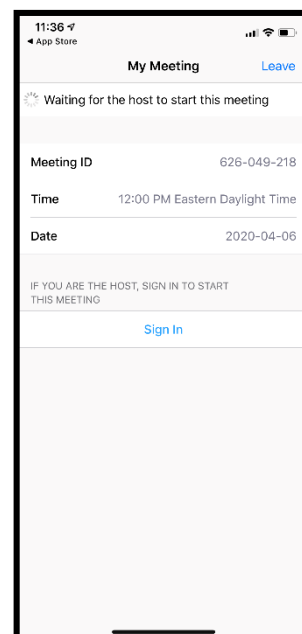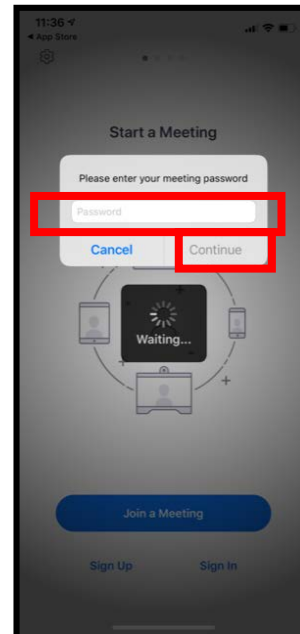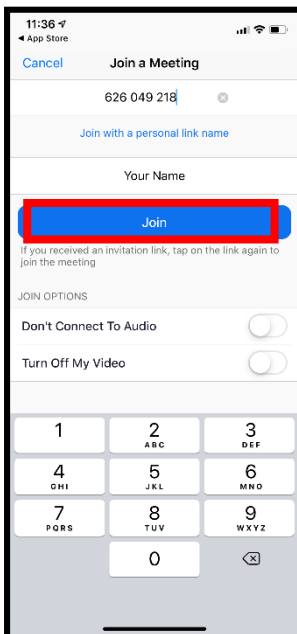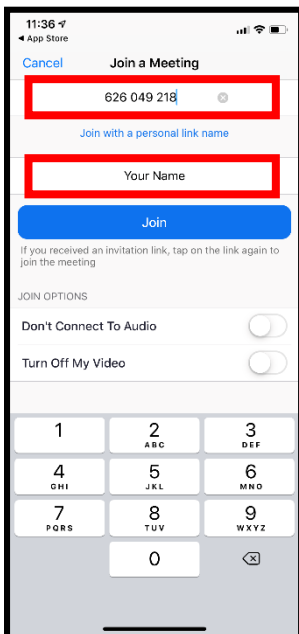
Step 1: Download Zoom

1. Open the **Play Store.**

2. Select the **search bar.**

3. Type in **Zoom** and tap **Zoom Cloud Meetings.**

4. Tap **Install.**

5. Once install is complete, tap **Open.**

Step 2: Join a Zoom Meeting

1. Open Zoom and tap **Join a Meeting.**

2. Type in the **Meeting ID** and **your name.**
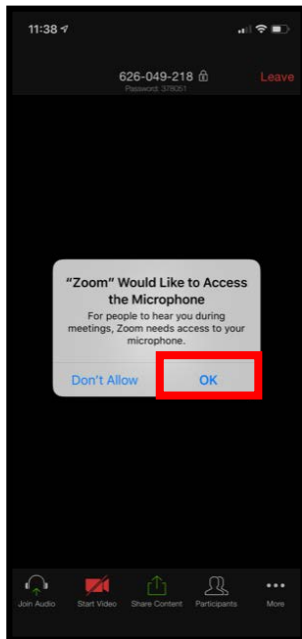
3. Tap **Join Meeting.**

4. If the meeting has a password, enter it and tap **ok.**

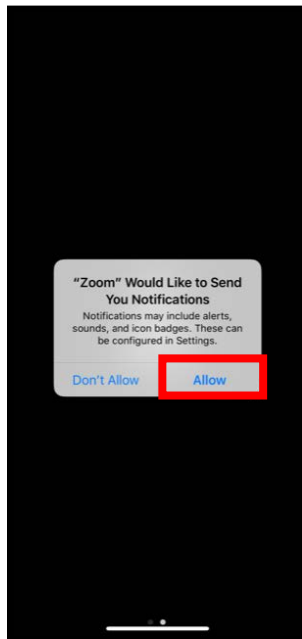5. If the host has not joined yet, you will see this screen.
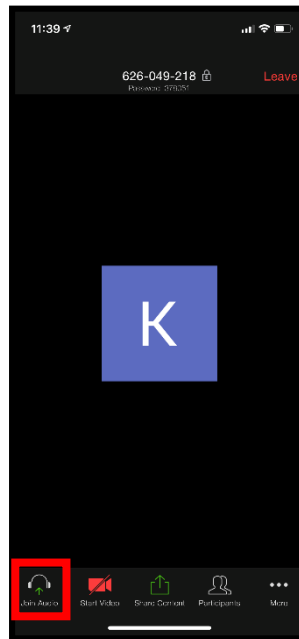
accenture
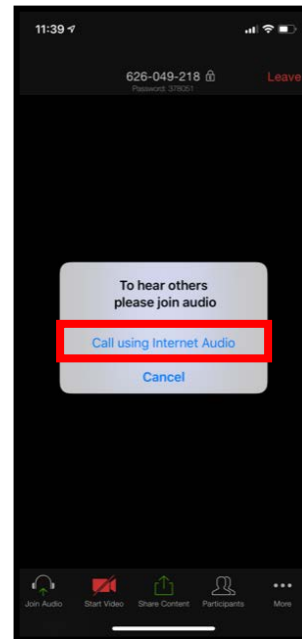
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Step 2: Join a Zoom Meeting (Continued)

5. Once the host joins, you will see this screen the first time you join a meeting. Tap **Ok.**
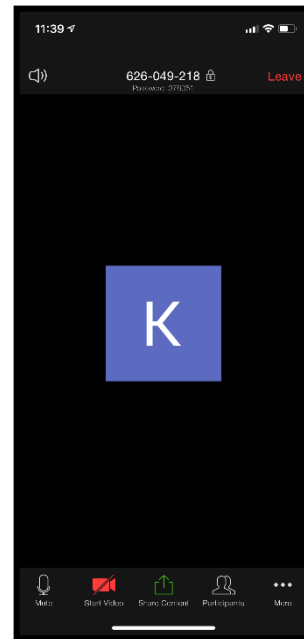
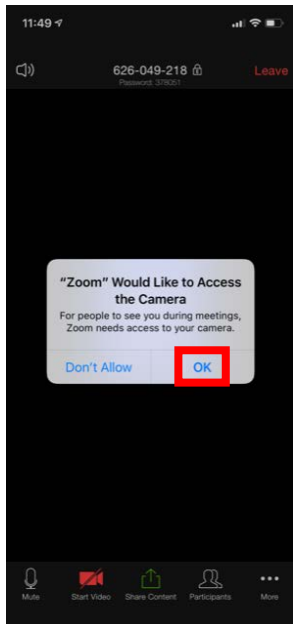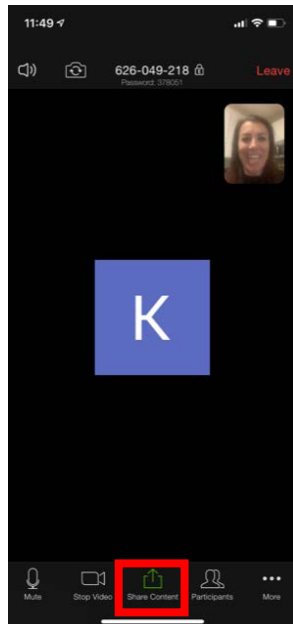6. Tap **Allow.**

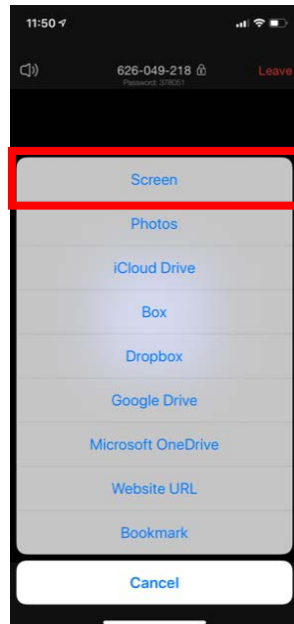7. Tap **Join Audio.**

8. Tap **Call using Internet Audio.**

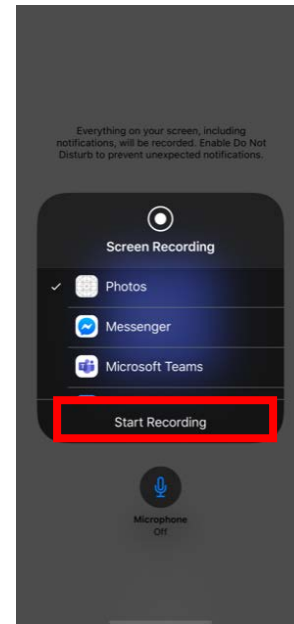9. You can now hear and speak in the call. To enable video, tap **Start Video.**

10. Tap **Ok.**

11. To share your screen, tap **Share Content.**

12. Tap **Screen.**

13. Select the application you want to share and tap **Start Recording**.
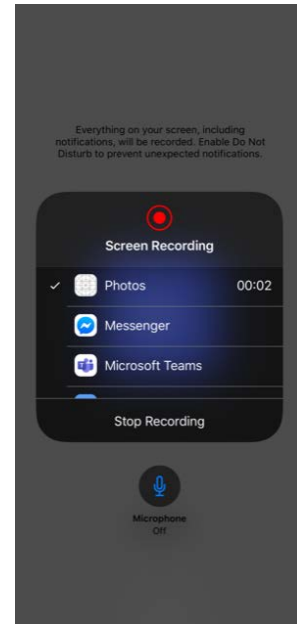
14. Go to the app you want to share. Tap **Stop Recording** when done.

Step 1: Download Zoom

1. Type or paste the following **link** in your web browser**:**
https://www.zoom.us/download
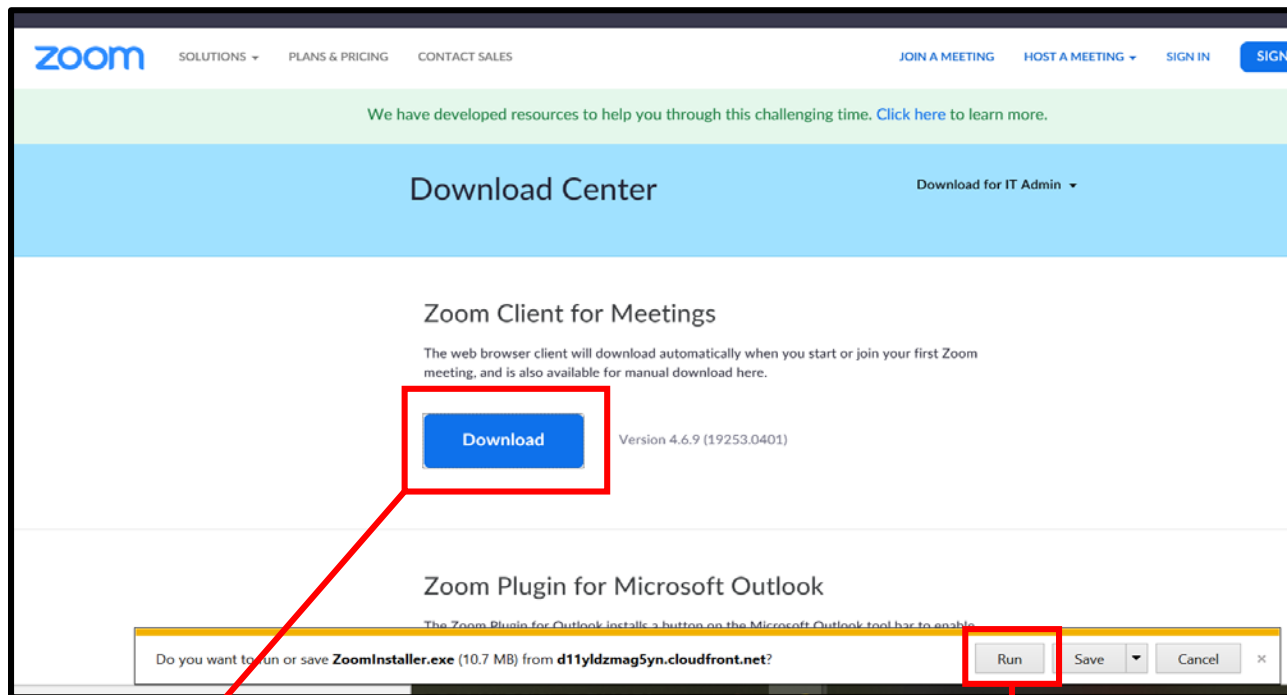
2. Click **Download.**

3a. Click the **Run** button on the bottom of the page.
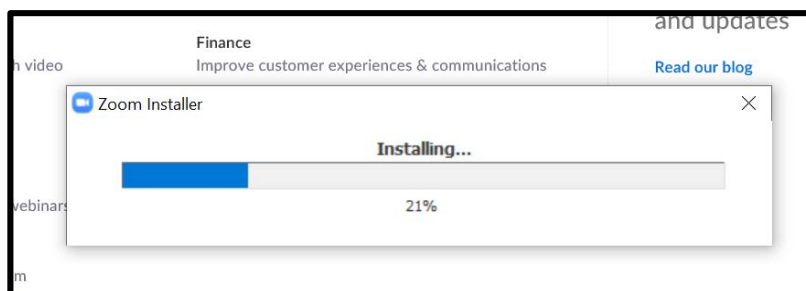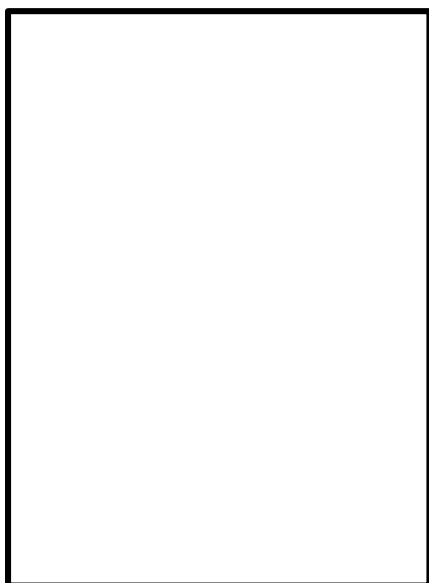
4. You will see the above page show up on your screen as Zoom finishes installing on your Windows PC.

3b. You might see this on your screen instead, if so click on **ZoomInstaller.exe.**

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Step 2: Set Up Zoom

When you open Zoom for the first time, you will need to set it up. You will only need to do this upon your first use.
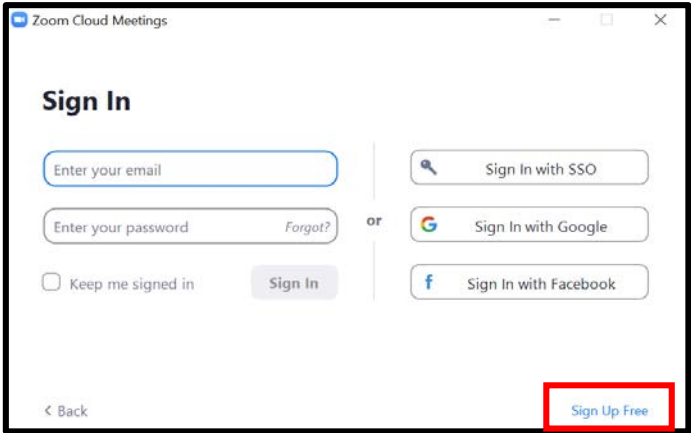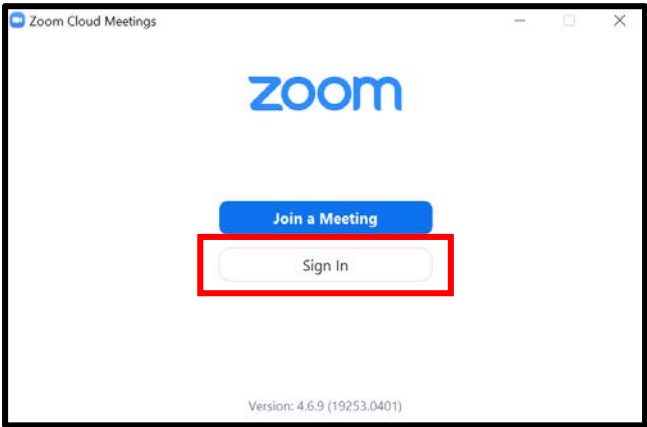
1. The following window will pop up on your computer once Zoom has been installed on your machine. Click the **Sign in** button.

2. Navigate to the bottom right of the page and select **Sign Up Free**. A browser window will open.
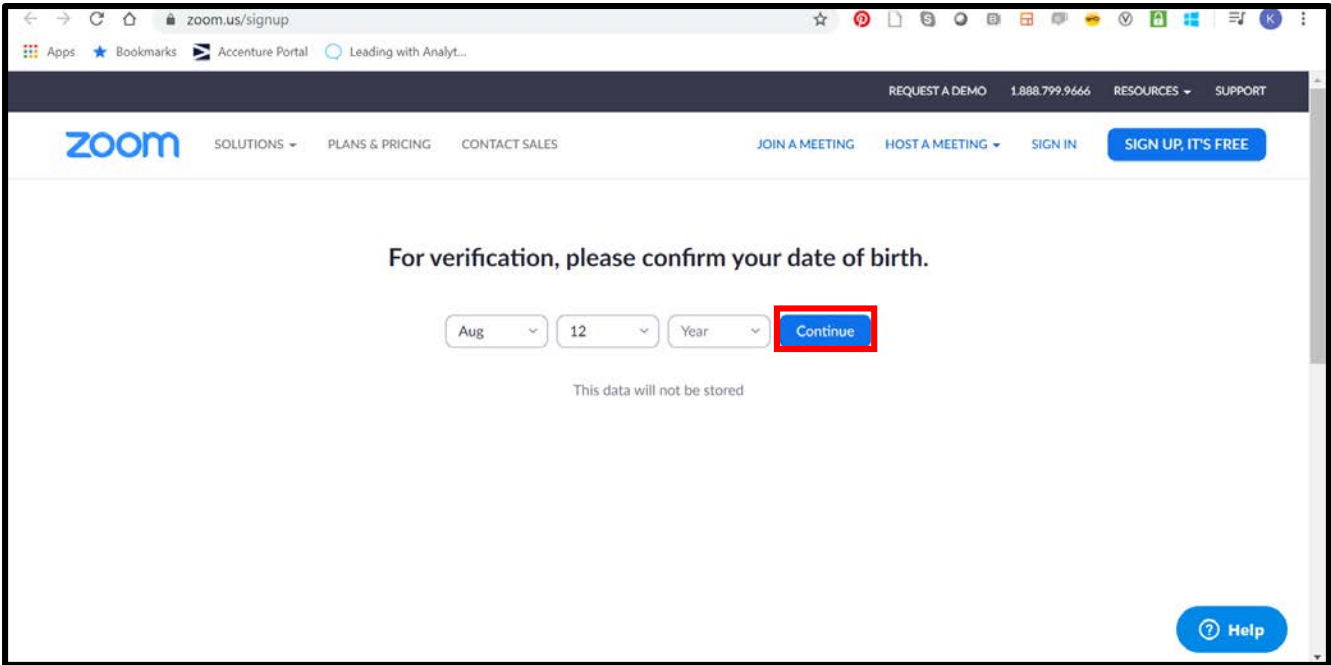
2. Enter in the month, day and year of your birth. Click **Continue.**

Step 2: Set Up Zoom (Continued)

3. Enter your email address and click **Sign Up.**

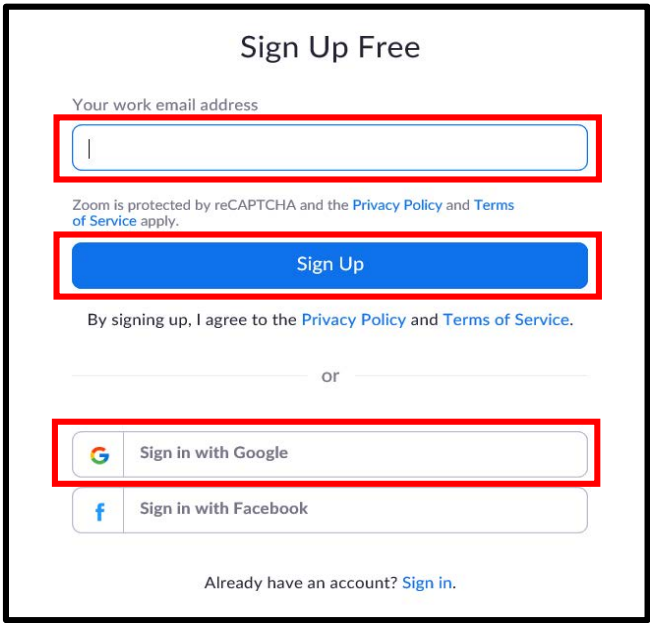If you have a Google account, you can scroll down and **Sign in with Google.** Skip to step 7 if you want to sign in with Google.

4. The following window will appear. Log in to your email account and open the Zoom email.

5. Select **Activate Account** found in the Zoom email sent to your provided email.

6. Enter in your name and a new password. Select **Continue.**

Step 2: Set Up Zoom (Continued)

5. Select **Activate Account** found in the Zoom email sent to your provided email.

6. Enter in your name and a new password. Select **Continue.**

Continue here if using your Google account:

7. Enter your **Gmail** account information and select **Next** to enter password.

8. Select **Create Account**.

Step 3: Sign Into Zoom

After initial set up, you will be asked to sign into Zoom when you open it.
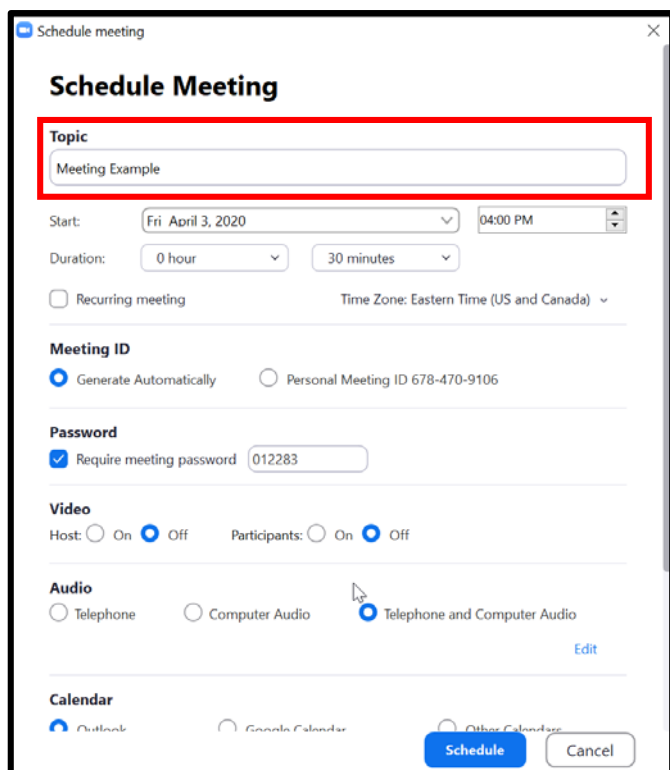
5a. Enter your email and password then press the **Sign In** button.

5b. If you signed in with your Google account, select **Sign In with Google.**

Step 4: Create a Zoom Meeting
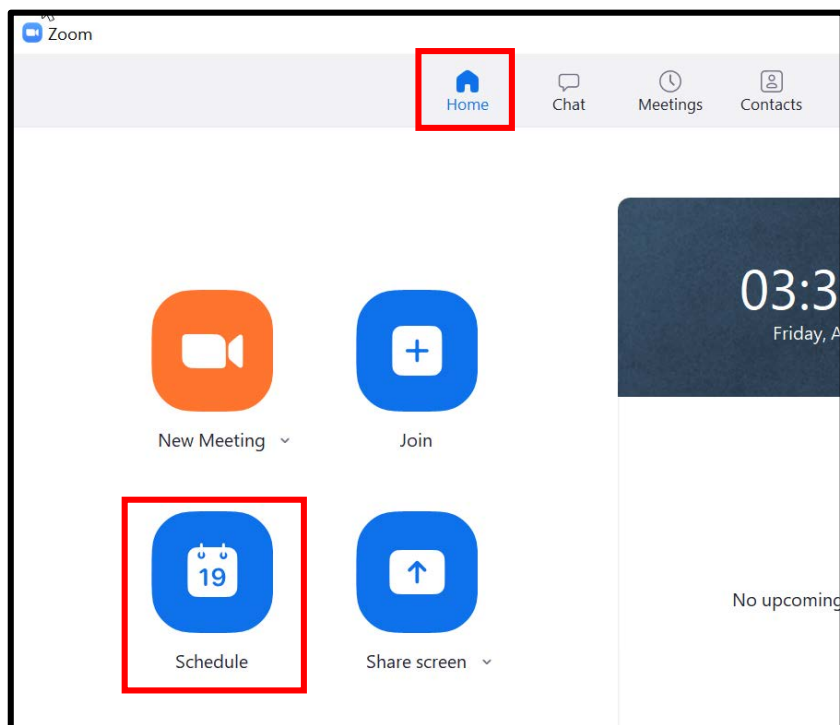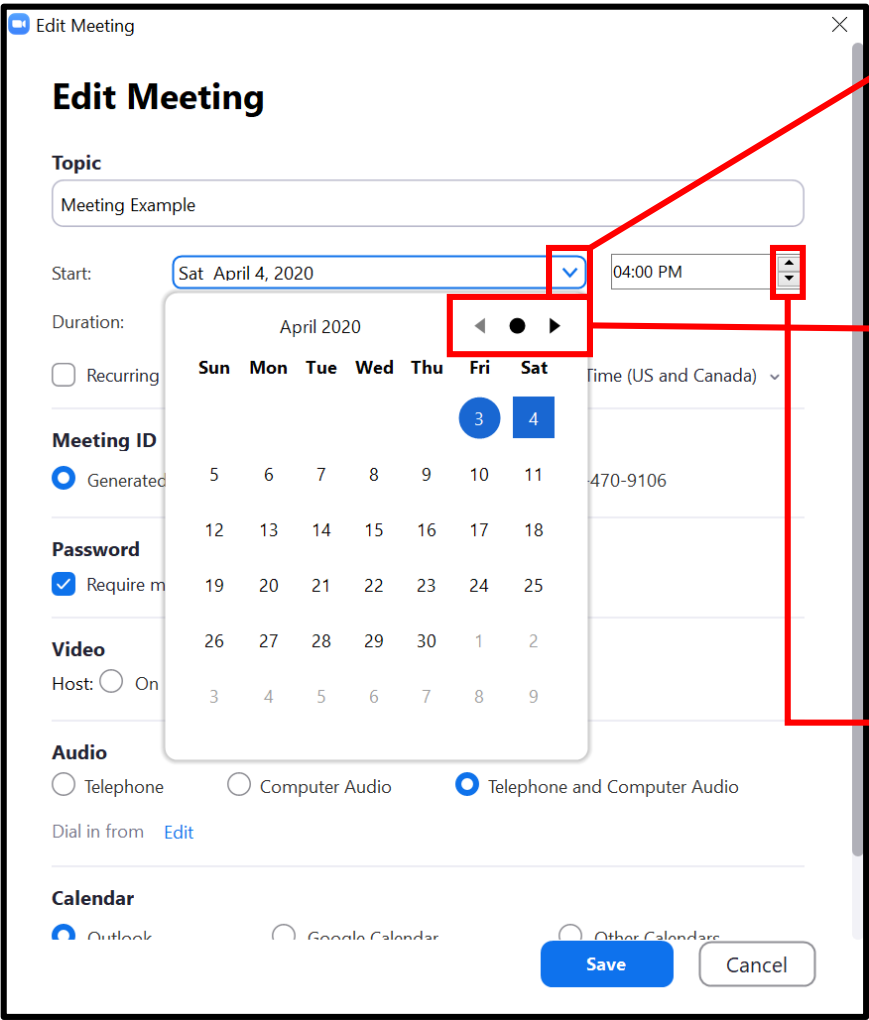
1. Select **Home** from the menu at the top of the page and select **Schedule.**

2. Enter the meeting title in the **Topic** Section.

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Step 4: Create a Zoom Meeting (Continued)
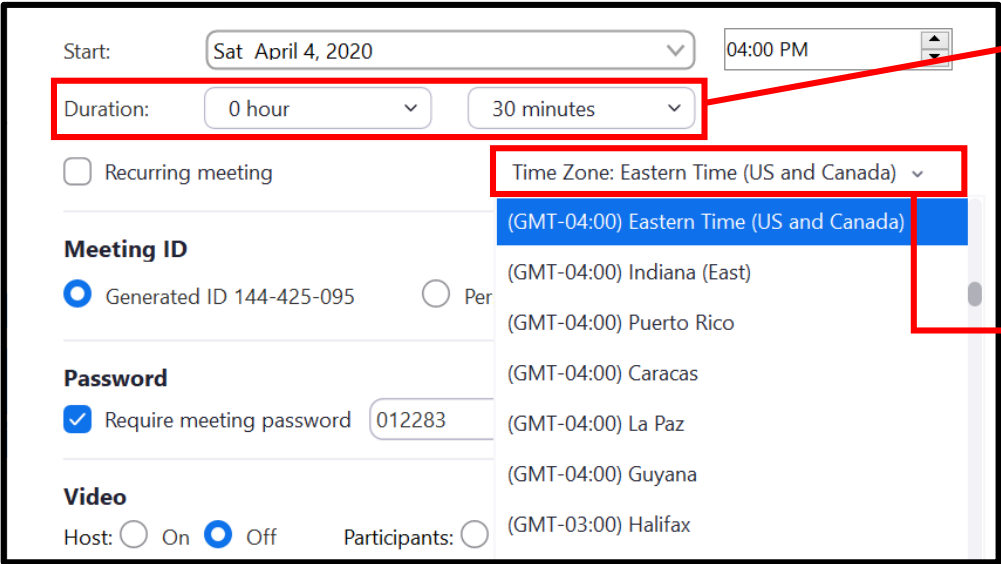
1. To change the meeting date and time, click on drop down arrow to show the calendar.

2. Use the left and right arrows to change the month/year.

3. To select the meeting day, click on the desired date on the calendar below.

4. Use the up and down arrows to change the time.
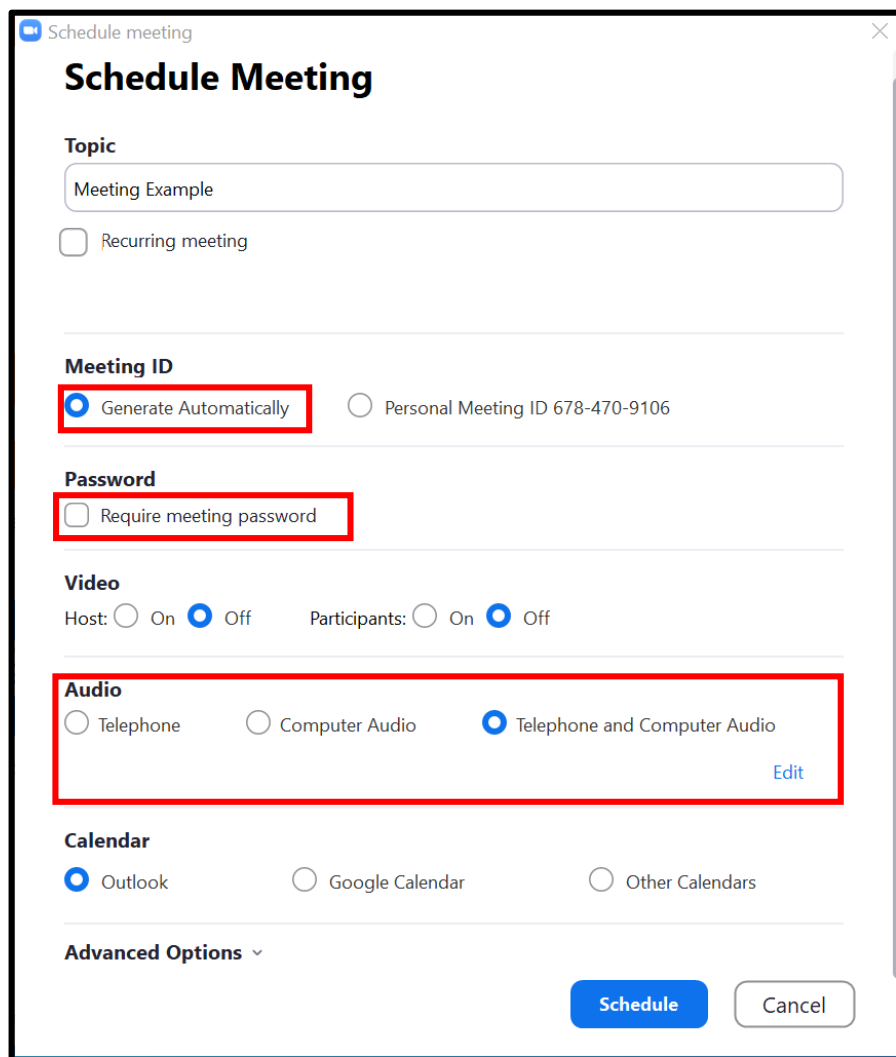
5. Use the drop-down menus to change the **Duration.**
NOTE: *Zoom Basic Plans only allow for maximum duration of 40 minutes if a meeting has more than 2 participants*

6. Use the drop-down menu to change the **Time Zone.**
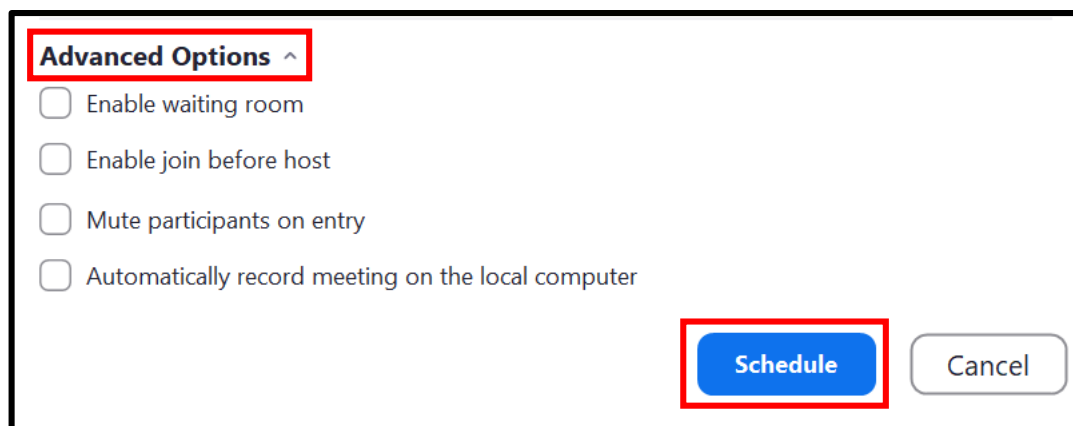
Step 4: Create a Zoom Meeting (Continued)

7. Select **Generate Automatically** for Meeting ID.

8. Check **Require meeting password** box for added security.

9. Select **Both** for Audio to allow participants to use phone or computer audio.

10. Select the drop icon for **Advance Options** and Check the box on any of the meeting options above as needed.

11. Click **Schedule**.

Step 5: Invite Others to a Zoom Meeting
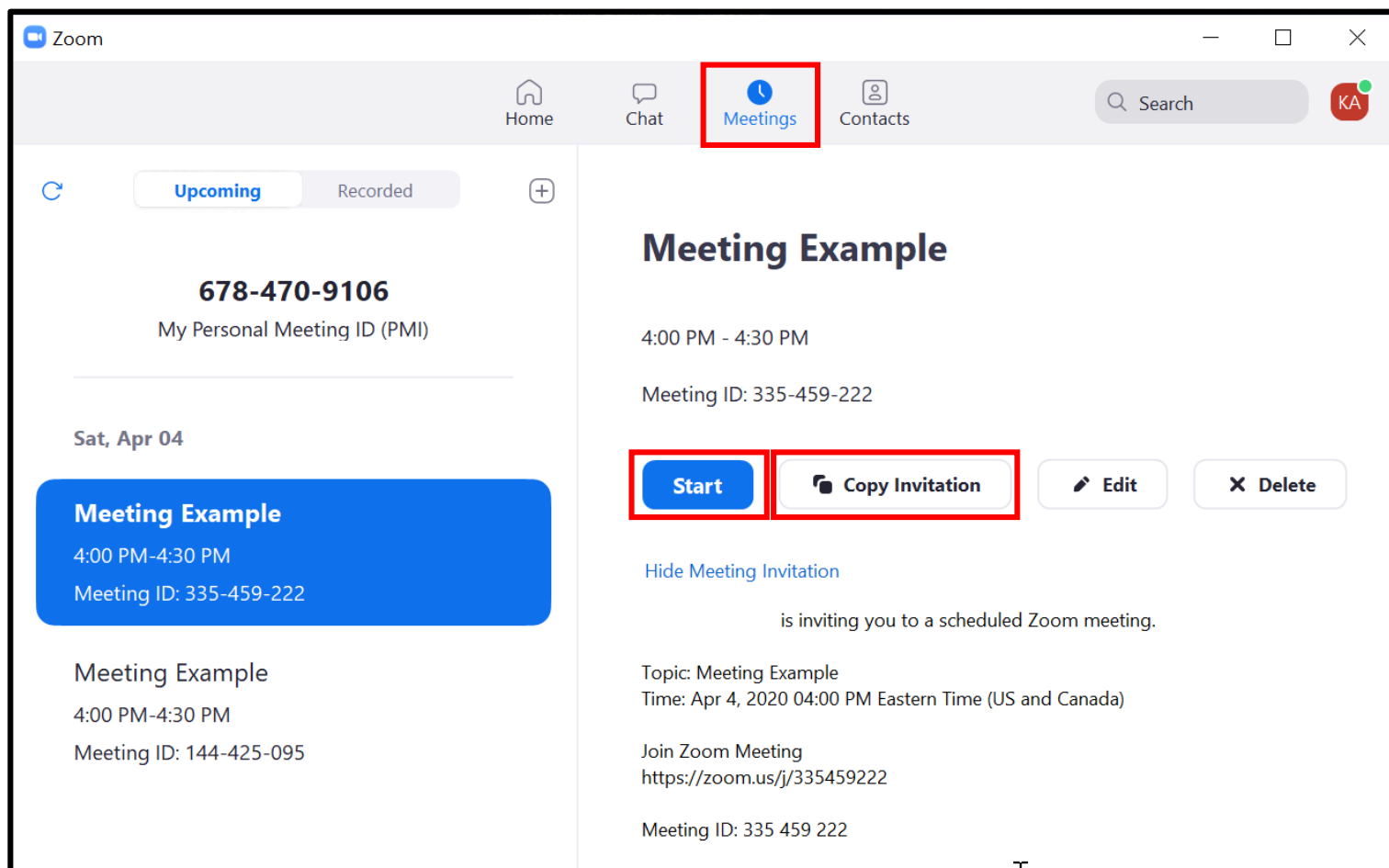
1. Once you have saved your meeting, navigate to the Meetings page using the menu at the top.

2. To invite others to the meeting, select the meeting and select **Copy Invitation**, which includes **Meeting ID, a link to join and the password (if applicable).** Paste into an email or text to send to attendees.

3. When you are ready to start the meeting, click the **Start** button beneath the meeting details.

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Step 6: Join a Zoom Meeting
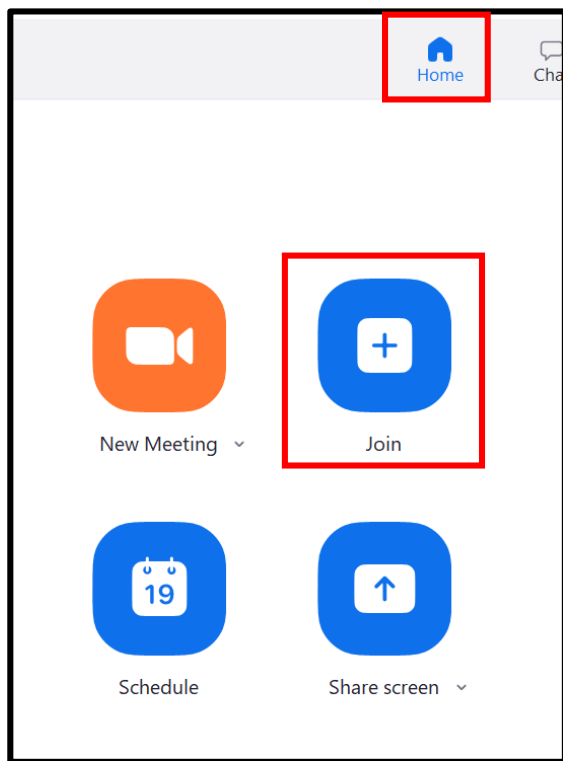
1. Navigate to the Home screen from the menu at the top of the page. Click **Join.**
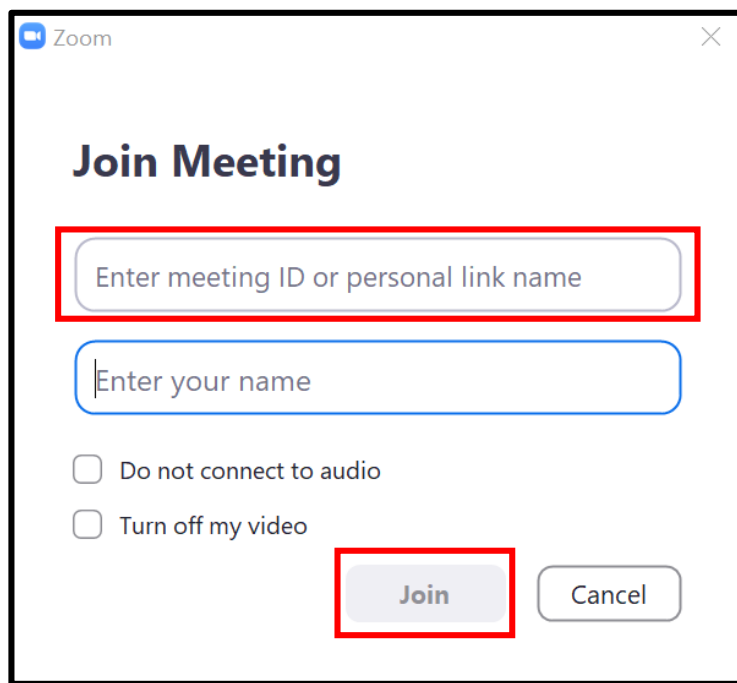
2. Enter the 6 digit **Meeting ID** or **Personal Link Name** given to you by the meeting organizer. Click **Join.**
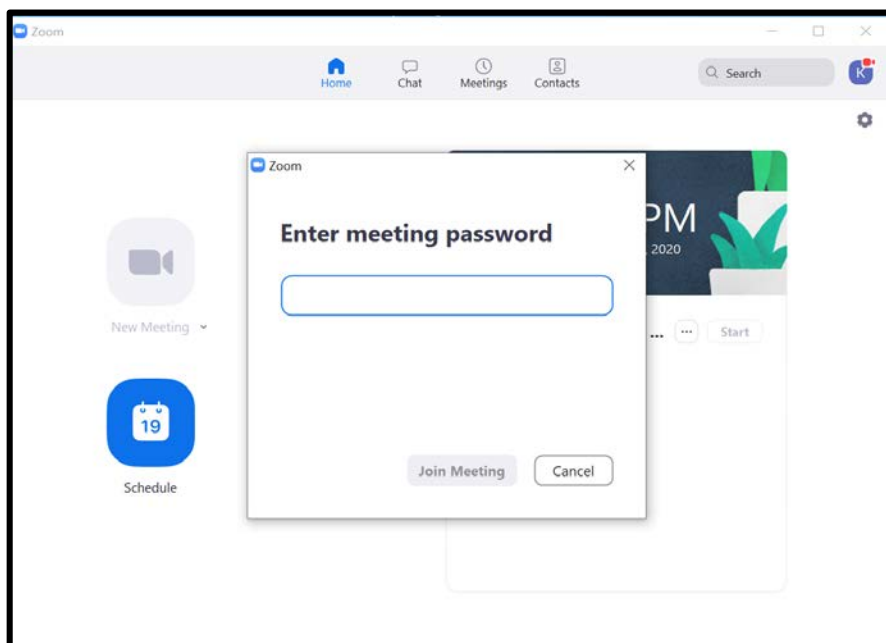
3. Enter the meeting password if asked.

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Step 6: Join a Zoom Meeting (Continued)
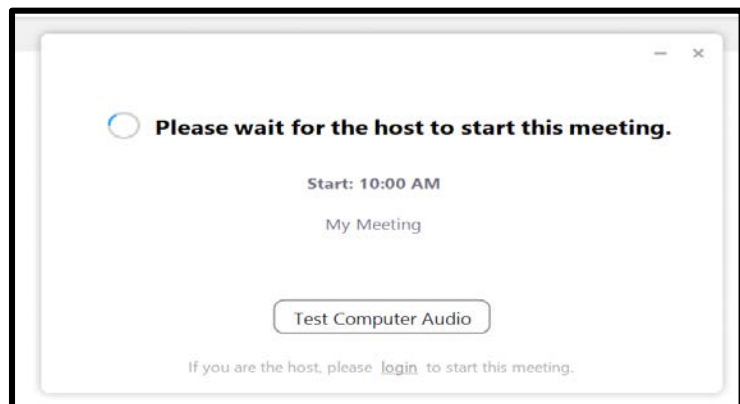
4. You may see this screen if the host has not yet joined the meeting.
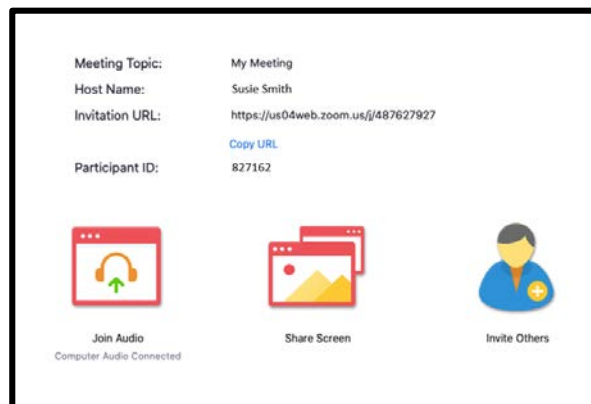
5. The above screen will appear once the host has joined the meeting.
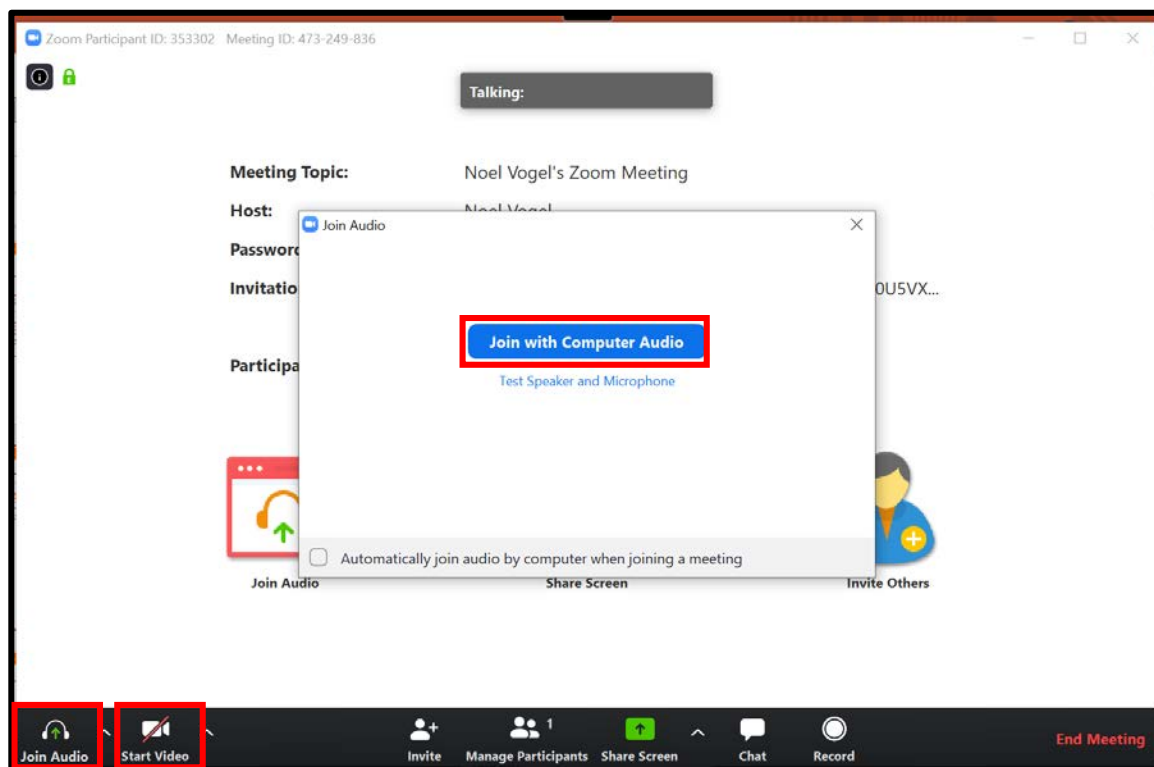
6. Select **Join Audio** to enable sound.

7. Click **Join with Computer Audio** to join through your computer microphone and speakers.

8. Click **Start Video** to enable video

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Step 7: Share Screen in a Zoom Meeting
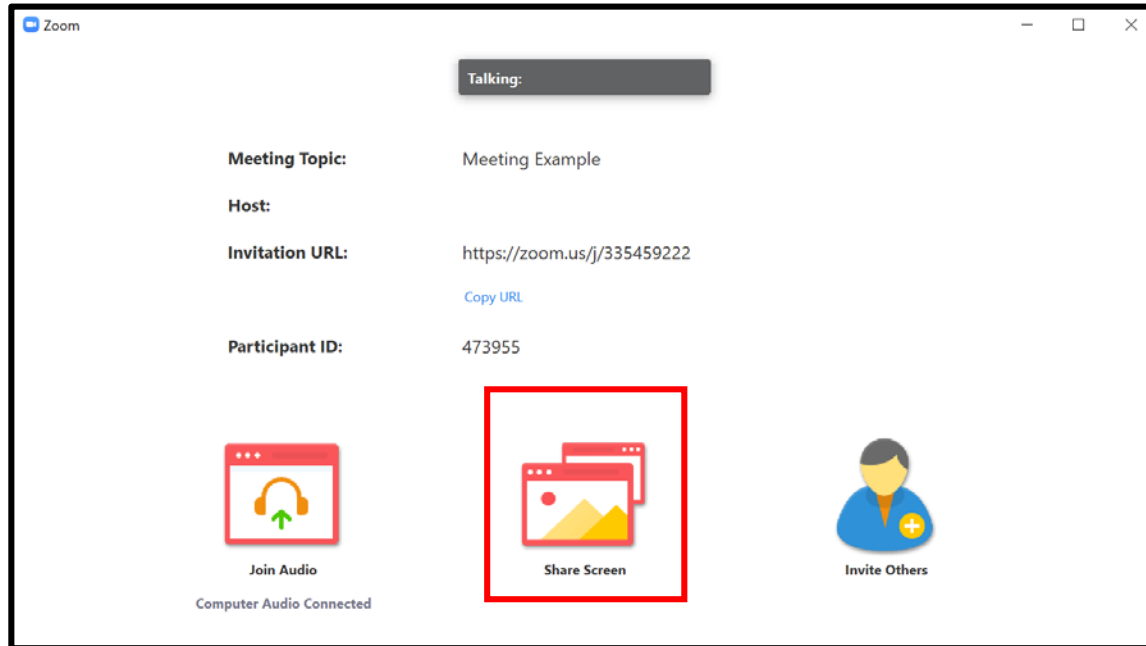
1. In the meeting, select **Share Screen.**
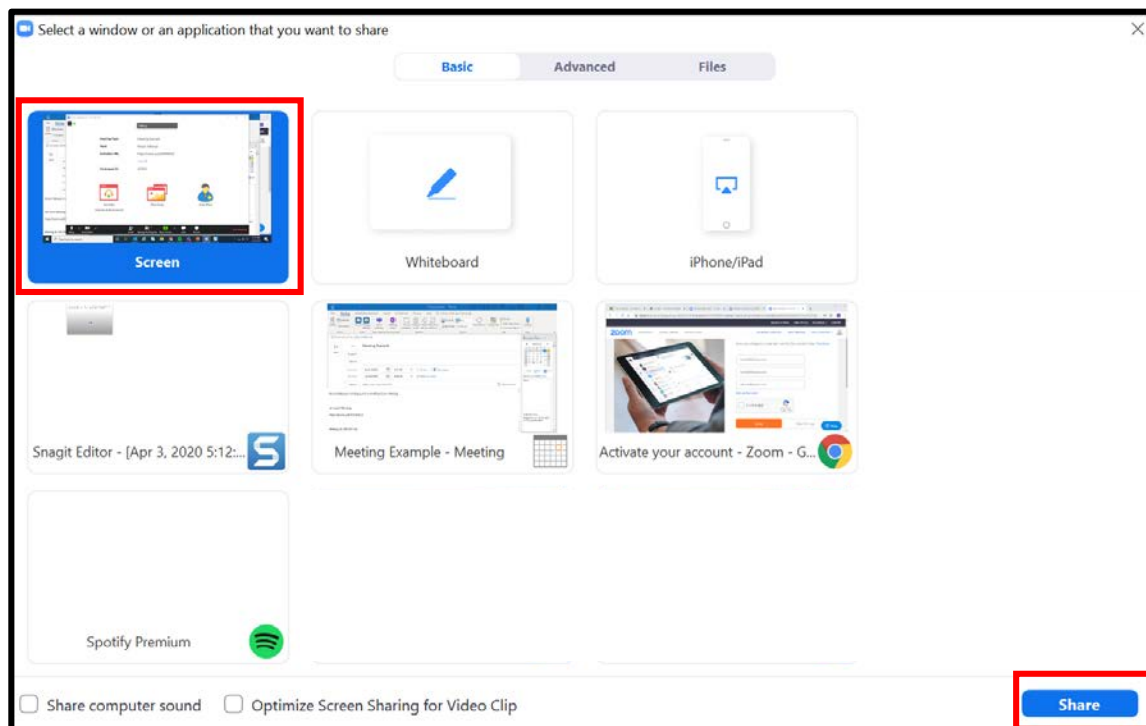
2. Select **Screen** to share your whole desktop screen. Then click **Share.**

ZOOM for Apple Mac Users

Step 1: Download Zoom

1. Type or paste the following **link** on your web browser**:**
https://www.zoom.us/download
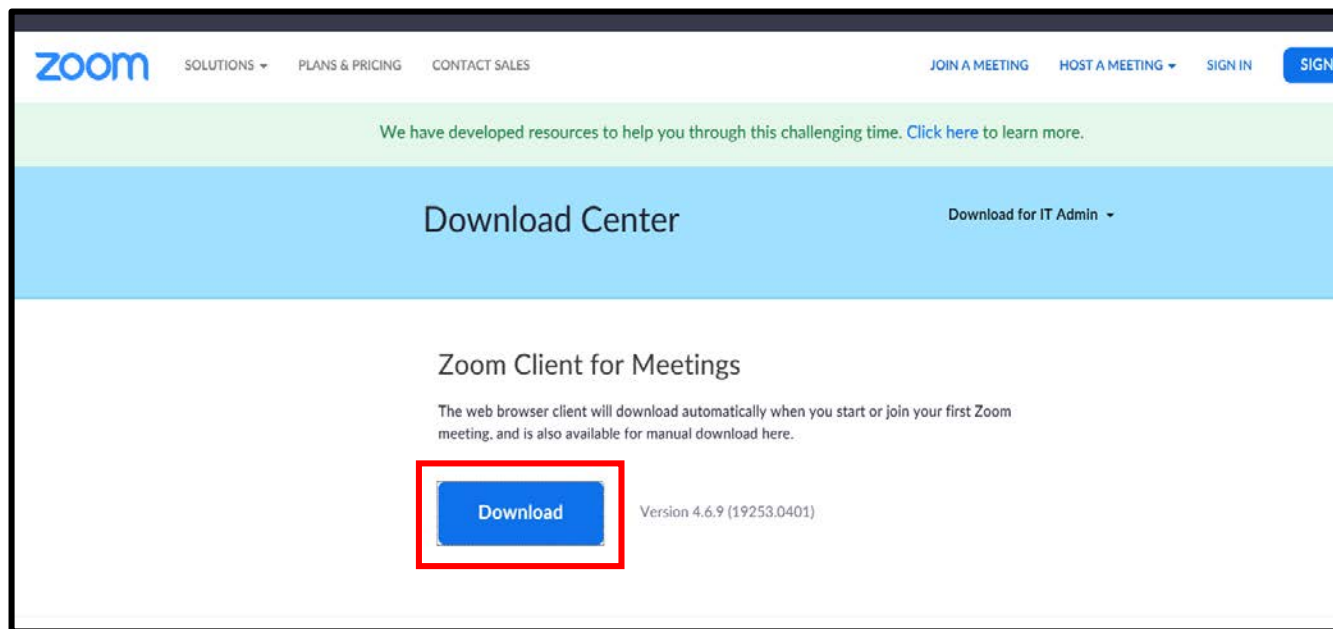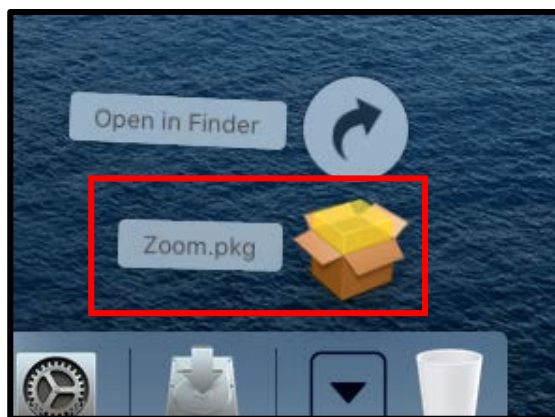
2. Click **Download.**

3. Click the **download icon** on your home screen and open **Zoom.pkg.**

Step 1: Download Zoom (Continued)
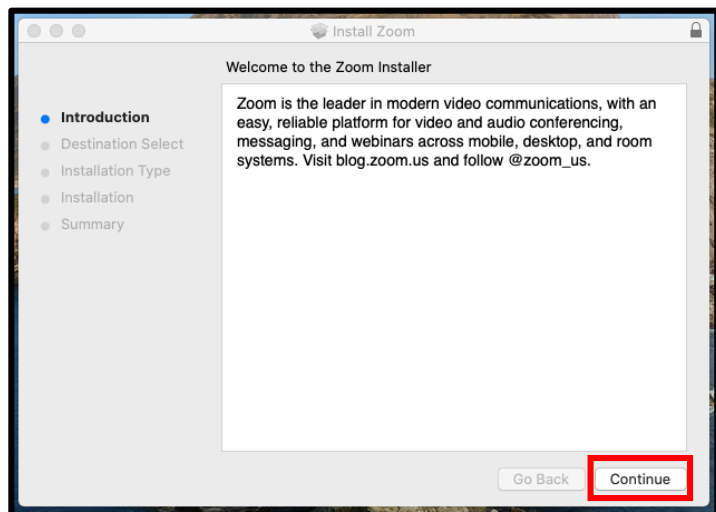
4. Click **Continue** to proceed.
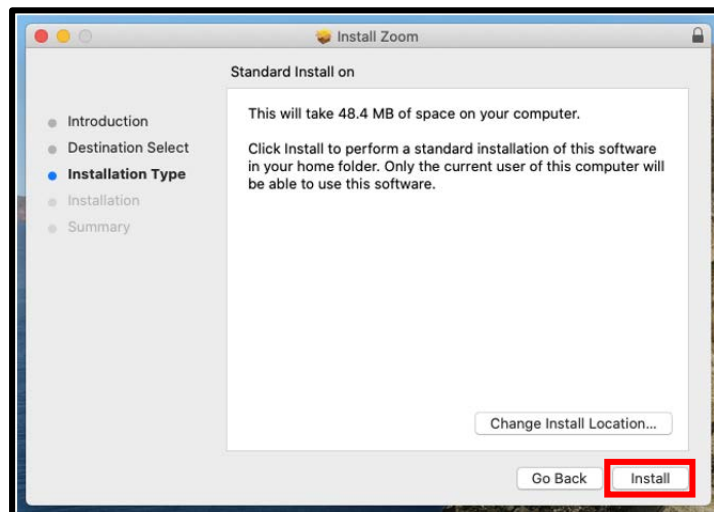
5. Click **Install**.
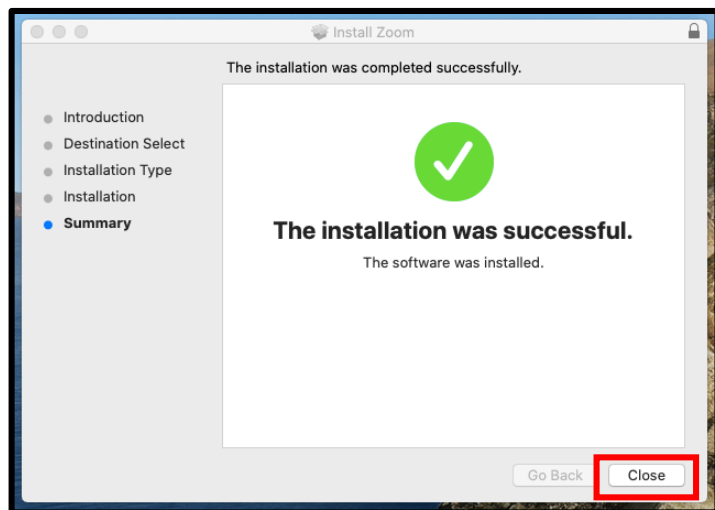
6. When the software is finished installing, the above message should appear on your screen. Click **Close.**

Step 2: Set Up Zoom

When you open Zoom for the first time, you will need to set it up. You will only need to do this upon your first use.
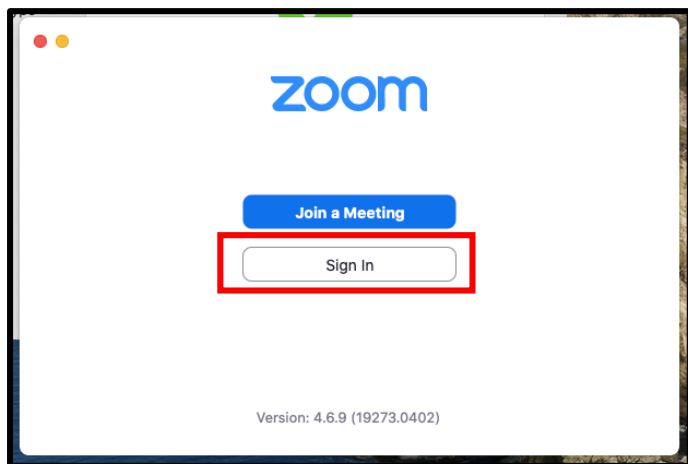
1. After installing, the Zoom window, shown above, should have popped up on your screen. Click **Sign In.**
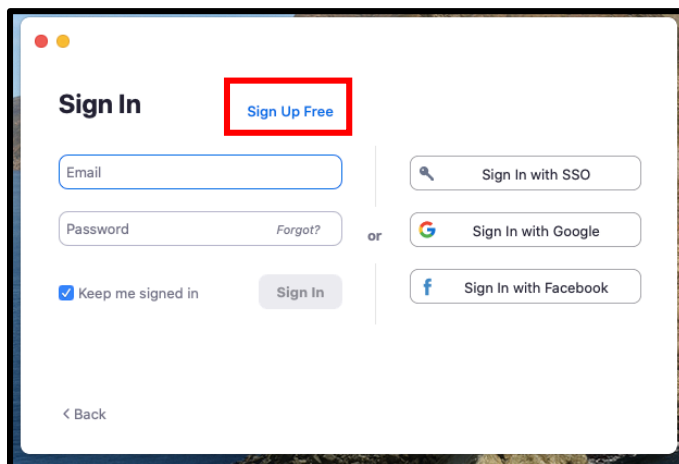
2. Select **Sign Up Free**.

3. Enter your email address and click **Sign Up.**

If you have a Google account, you can scroll down and **Sign in with Google.** Skip to step 7 if you want to sign in with Google.

Step 2: Set Up Zoom (Continued)

We've sent an email to YourEmail@gmail.com
Click the confirmation link in that email to begin using Zoom.

if you did not receive the email,

Resend another email

4. The following window will appear. Log in to your email account and open the Zoom email.

Welcome to Zoom!
To activate your account please click the button below to verify your email address:

Activate Account

By clicking this button, you confirm that you are at least 16 years of age.

5. Select **Activate Account** found in the Zoom email sent to your provided email.

Welcome to Zoom

Hi, **youremail@gmail.com**   Your account has been successfully created. Please list your name and create a password to continue.

First Name

Last Name

Password

Confirm Password

By signing up, I agree to the Privacy Policy and Terms of Service.

Continue

6. Enter in your name and a new password. Select **Continue.**

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Step 2: Set Up Zoom (Continued)

Continue here if using your Google account:

7. Enter your **Gmail** account information and password. Click **Next.**

8. Select **Create Account**.

Step 3: Sign Into Zoom

After initial set up, you will be asked to sign into Zoom when you open it.

JOIN A MEETING   HOST A MEETING ▾   **SIGN IN**   **SIGN UP, IT'S FREE**

1. Navigate to the menu on the top righthand side of the screen. Select **Sign In.**

Sign In

Email address

Email address

Password

Password

Sign In

Forgot password?   ☑ Stay signed in

or

G Sign in with Google

f Sign in with Facebook

New to Zoom? Sign Up Free

G Sign in with Google

Choose an account

to continue to **Zoom**

R Rob Smith
rob.smith@gmail.com

👤 Use another account

To continue, Google will share your name, email address, language preference, and profile picture with Zoom. Before using this app, you can review Zoom's **privacy policy** and **terms of service.**
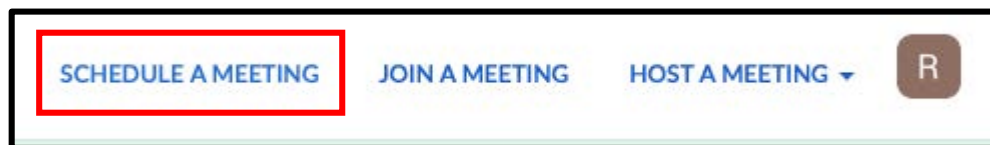
2. Enter your email address and password and click **Sign In.** Or, to sign in with your Google account, select **Sign in with Google.**
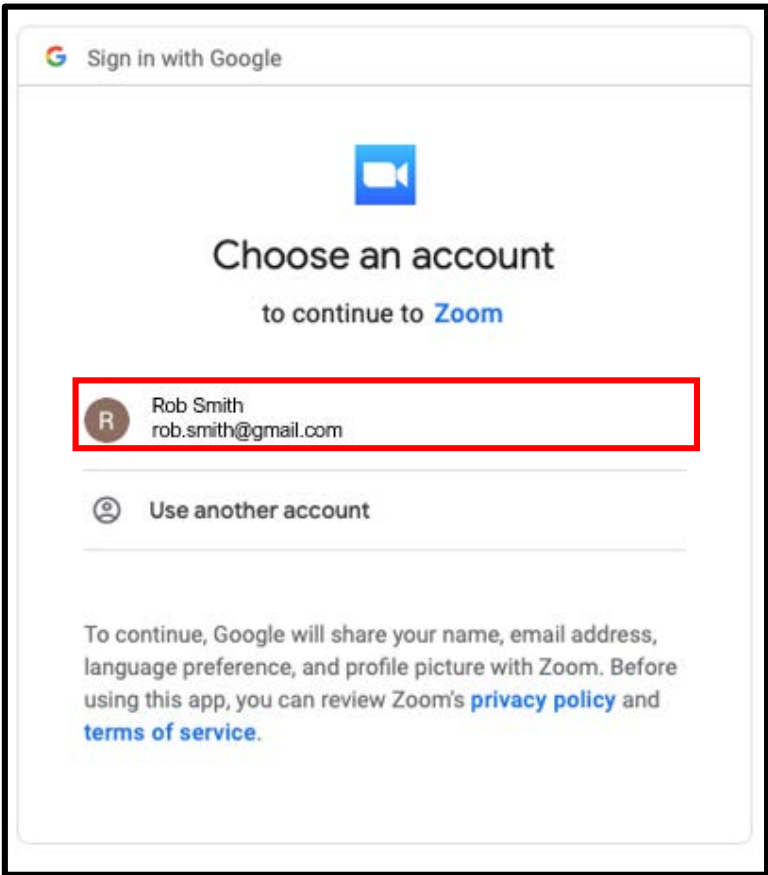
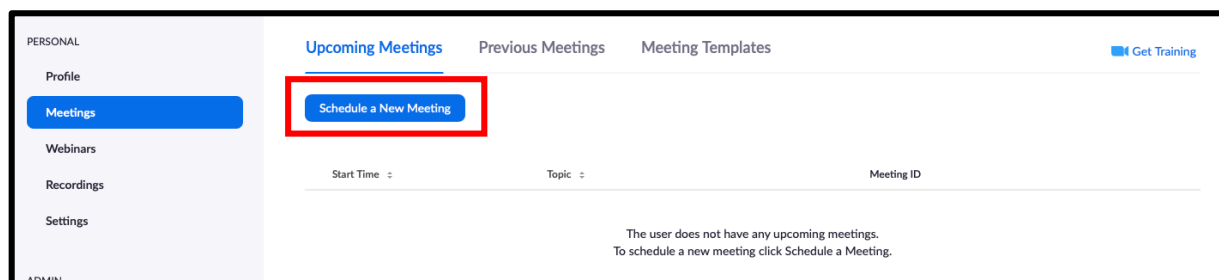3. If signing in with your Google account, select the account you wish to log in with.
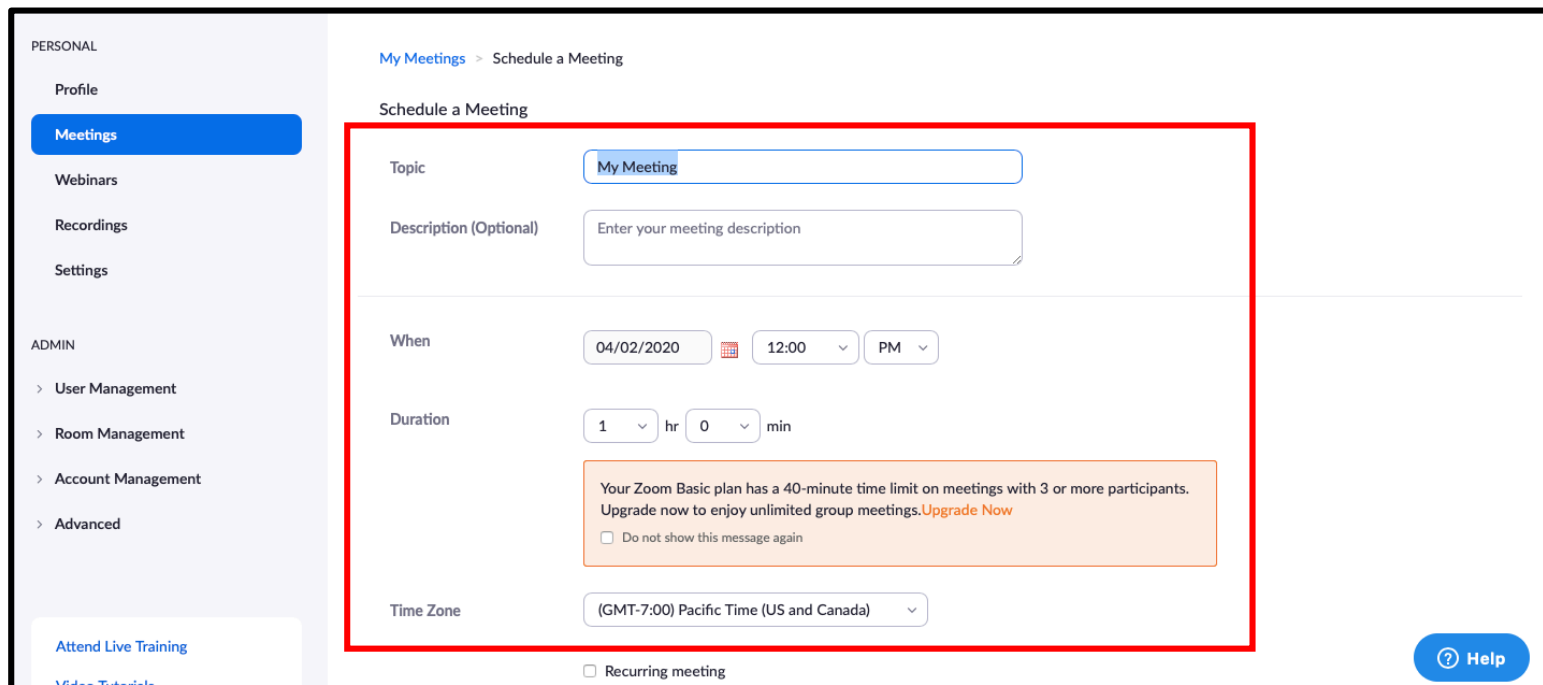
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Step 4: Create a Zoom Meeting

1. Navigate to the menu on the top right of the screen. Select **Schedule a Meeting.**
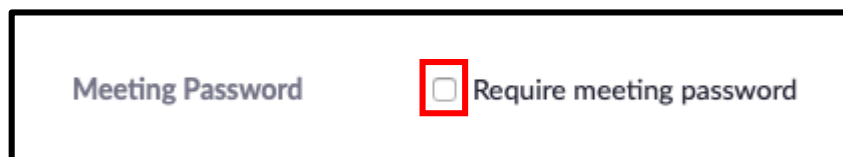

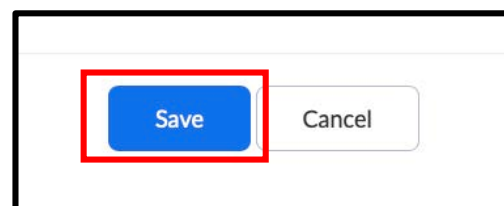2. Under the **Meetings** tab, select **Schedule a New Meeting.**

3. Enter a name, date and time, and duration for your meeting.
NOTE: *Zoom Basic Plans only allow for maximum duration of 40 minutes if a meeting has more than 2 participants*
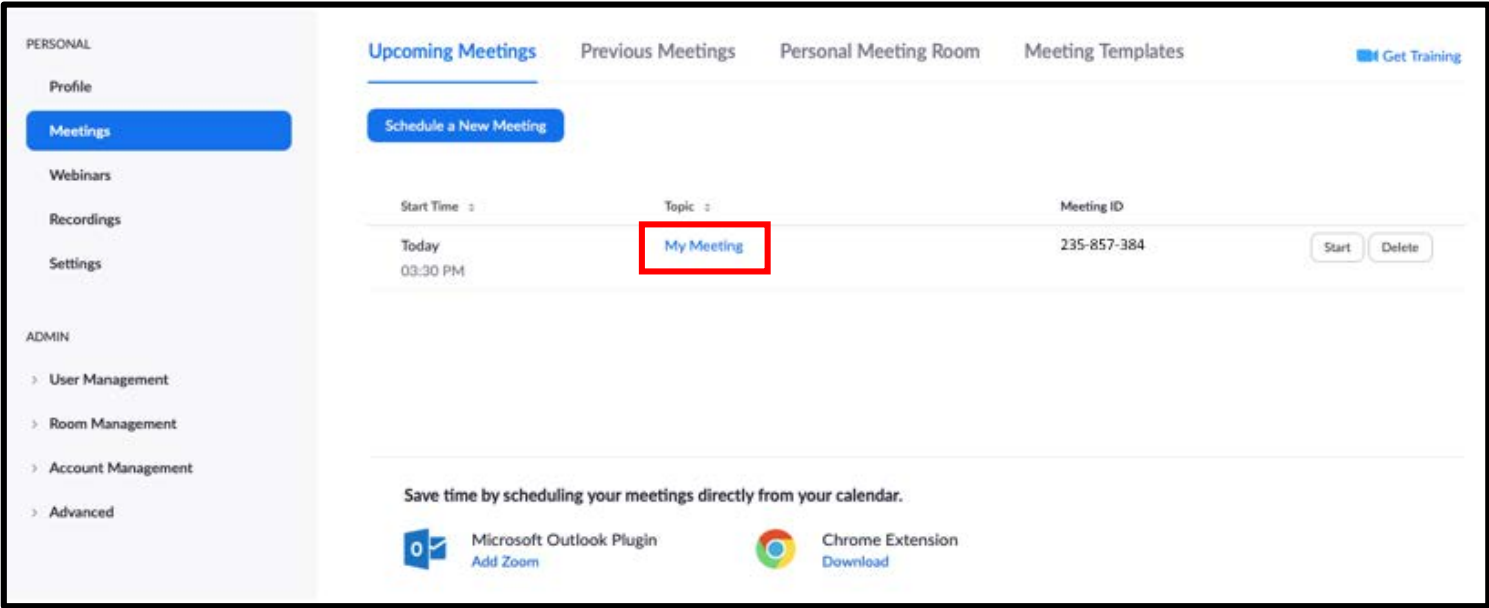

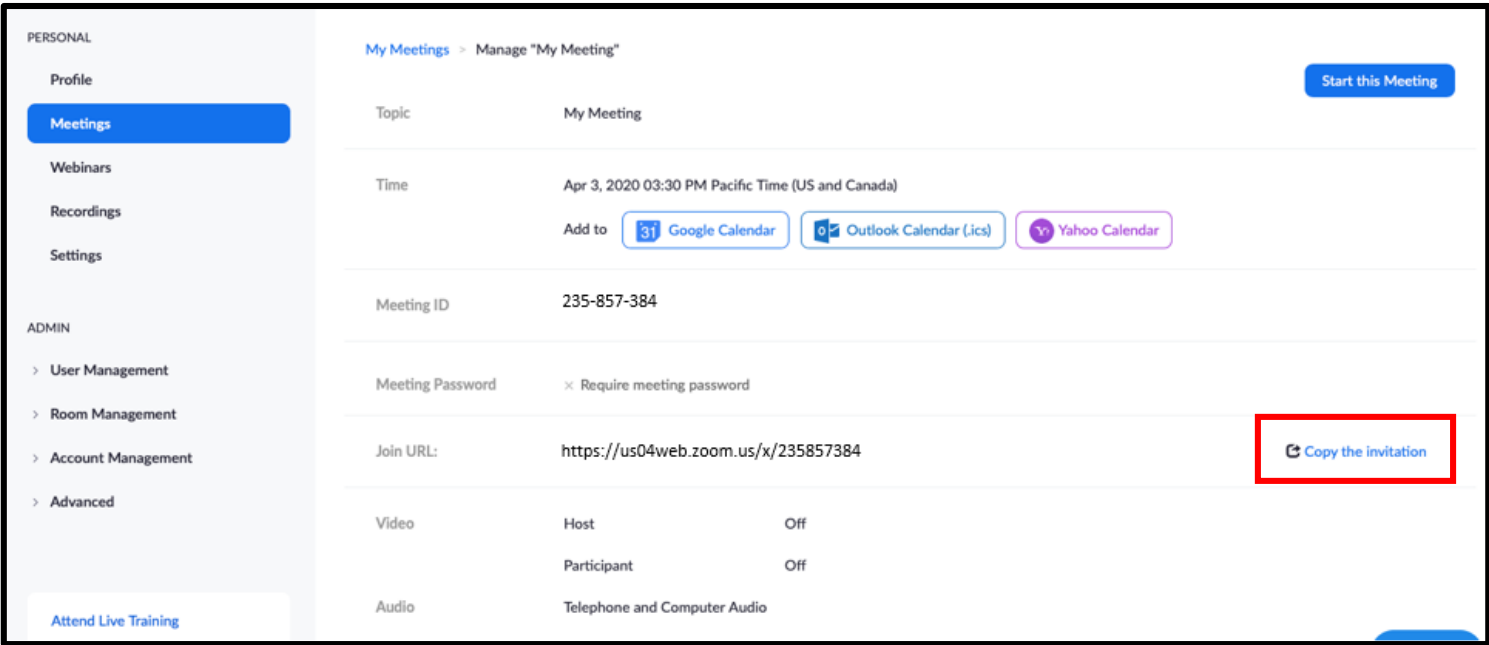4. Check **Require meeting password** box for added security.

5. Scroll down and click **Save** to schedule your meeting.

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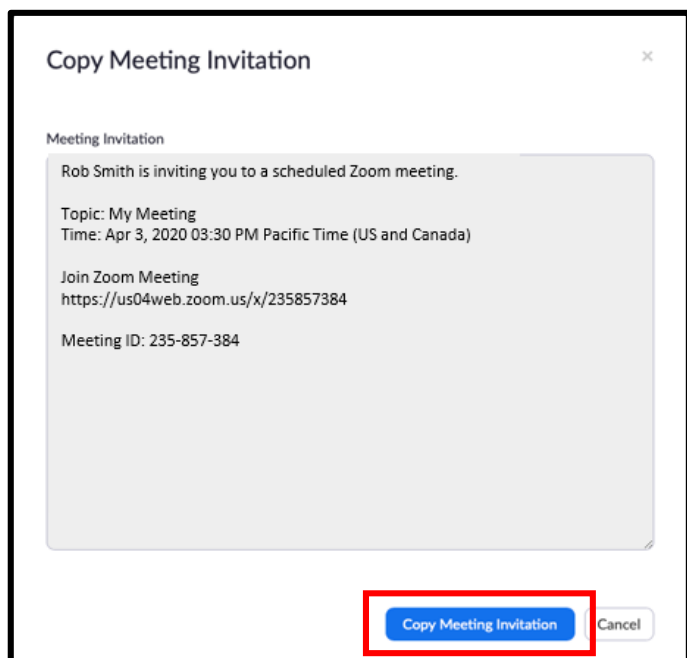## Step 5: Invite Others to a Zoom Meeting

1. Under the **Meetings** tab, select the meeting you want to invite others to.
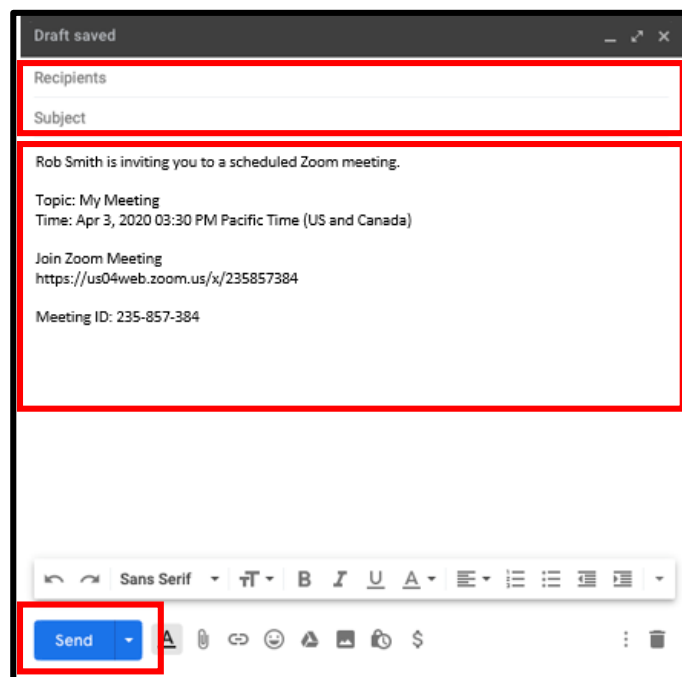

2. Select **Copy the invitation.**

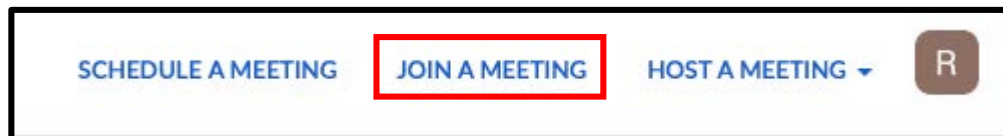## Step 5: Invite Others to a Zoom Meeting (Continued)
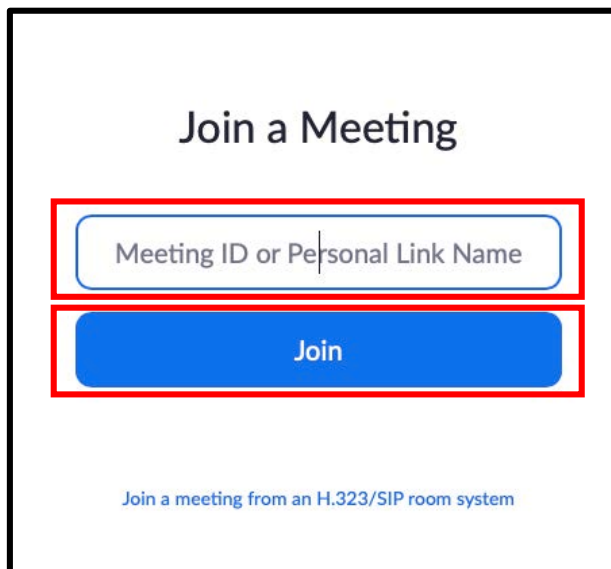

3. Click **Copy Meeting Invitation.**

4. Open your email account and start a new message. **Right Click and Paste** the text into the email. Don't forget to add recipients and a subject. Click **Send** to send the meeting invite**.**

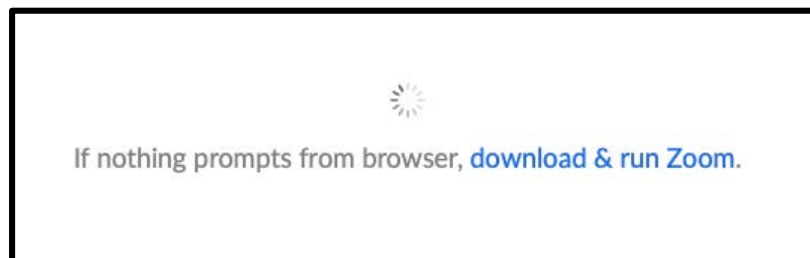You can also text this information to participants.
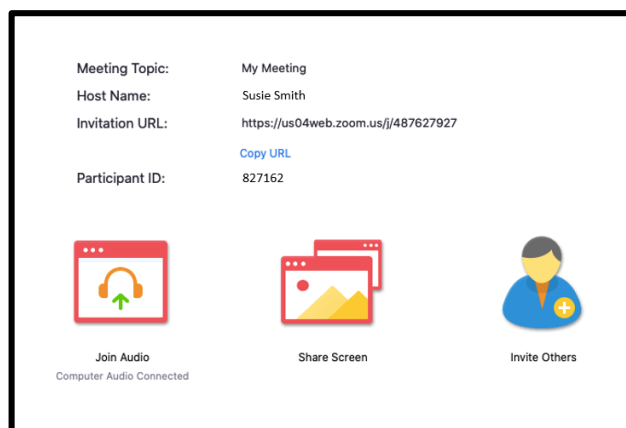
Step 6: Join a Zoom Meeting

1. Navigate to the menu on the top right of the screen. Click **Join a Meeting.**

3. The message above will appear as the meeting is loading.

2. Enter the 6 digit **Meeting ID** or **Personal Link Name** given to you by the meeting organizer. Click **Join.** Put in the password if prompted.
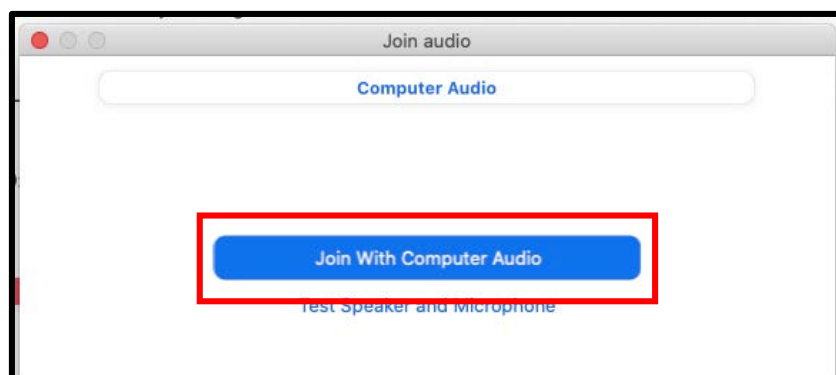

4. If the host has not joined the meeting yet, you will be asked to wait. The above screen will appear once the meeting has opened.
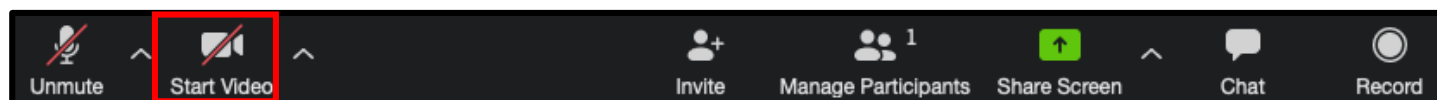
Step 6: Join a Zoom Meeting (Continued)

5. To join audio navigate to the menu on the bottom of the meeting screen. Select **Join Audio.** You can also join by selecting the icon for **Join Audio** in the middle of the screen.

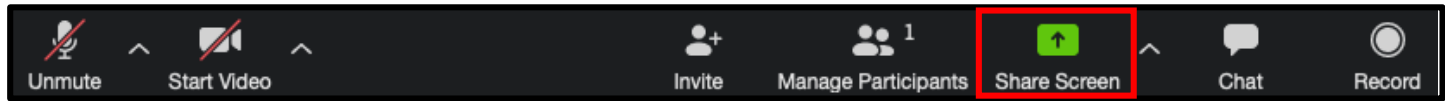6. Select **Join With Computer Audio** from the pop up that appears on the screen.

7. To enable video, navigate to the menu on the bottom of the meeting screen. Select the icon for **Start Video.**
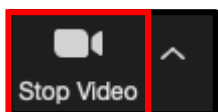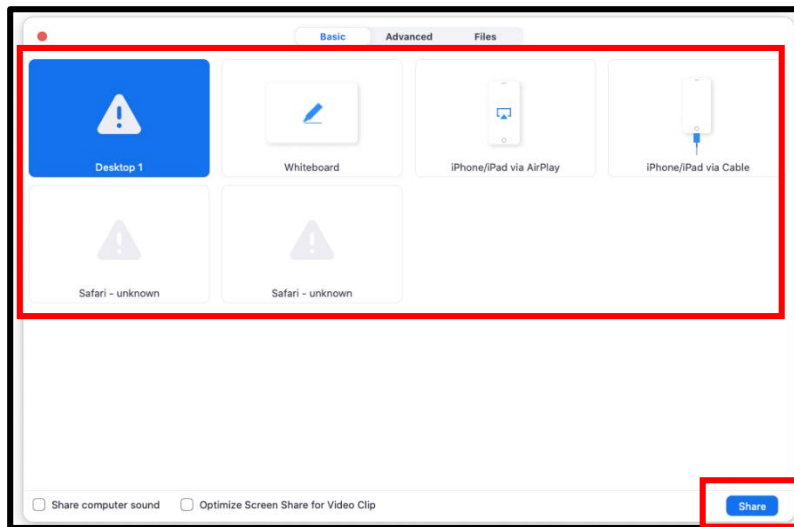

8. To stop the video, select the same icon, which should now say **Stop Video.**
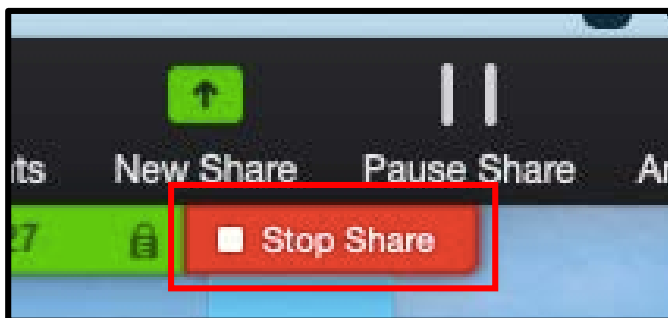
Step 7: Share Screen in a Zoom Meeting

1. Navigate to the menu at the bottom of the meeting screen. Select the icon for **Share Screen.**

2. Select the screen you wish to share. Click **Share** to begin sharing with other participants.

3. To stop sharing your screen, navigate to the menu at the top of the screen. Select **Stop Share.**