

Communication Tools: Zoom

Nicole Harr

Director of Community Engagement



PKD FOUNDATION
Polycystic Kidney Disease

Zoom for peer mentors

Office 365

- Outlook
- OneDrive



Zoom

- Desktop function
- Mobile app function



Zoom app vs. Zoom web portal

Web Portal

The Zoom web portal is primarily used for changing your profile, meeting or phone settings.

Think of the web portal as your “central hub” to review and update your profile and settings.

Zoom app

Zoom desktop and mobile apps allow you to schedule meetings, make calls, chat, etc.

Think of the app as an extension of the web portal. You will have access to some of the portal settings, but will mostly use the app to join meetings and make calls.



Web portal

Access the Zoom web portal to update your profile, change meeting settings or phone settings, record voice mail, etc.

[Zoom.us > sign in](#)



Download Zoom

Using Zoom on your mobile phone

- Go to your app store
- Download Zoom app



Using Zoom on your computer, laptop or tablet

Download the Desktop app to easily start video meetings or schedule a video meeting. You can also access your contacts, chats, make a phone call from your computer or tablet.

<https://zoom.us/download>




Using the web portal to set up your Zoom account



Setting up your Zoom profile

Update your profile picture

- Go to zoom.us to access your profile settings
- Click on My Account
- Choose profile

zoom SOLUTIONS ▾ PLANS & PRICING CONTACT SALES SCHEDULE A MEETING JOIN A MEETING HOST A MEETING ▾ 

Profile

Meetings

Webinars


Phone

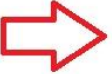
Recordings

Settings

Analytics

When you join meetings and webinars hosted on Zoom, your profile information, including your name and profile picture, may be visible to other participants. Your name and email address will also be visible to the [account owner](#) and host when you join meetings or webinars on their account while you're signed in. The account owner and others in the meeting can share this information with apps and others.

 **Nicole Harr**
Nicole Harr

 Edit





Profile

Meetings

Webinars

Phone

Recordings

Settings

Analytics

Account Profile

Reports

Attend Live Training

Video Tutorials

Knowledge Base



When you join meetings and webinars hosted on Zoom, your profile information, including your name and profile picture, may be visible to other participants. Your name and email address will also be visible to the [account owner](#) and host when you join meetings or webinars on their account while you're signed in. The account owner and others in the meeting can share this information with apps and others.



Nicole Harr

Nicole Harr

Edit

Personal

Phone Not set

Add Phone Number

Zoom Phone Extension Number 143
Direct Number +1 816-268-8483

Language English

Time Zone (GMT-5:00) Central Time (US and Canada)

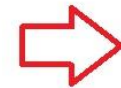
Date Format mm/dd/yyyy Example: 05/28/2021

Edit

Edit

Edit

Double check your time zone!



Profile

Meetings

Webinars

Phone

Recordings

Settings

Analytics



History Voicemail Recording Settings

Package Zoom United with US/CA Unlimited ⓘ

Number(s) (816) 268-8483 (United States)

Extension Number 143

Emergency Address ⓘ Default: 1001 E 101ST TER, STE 220, KANSAS CITY, Missouri 64131, United States (Company Address) Edit

Personal Emergency Address



In case of emergency when using your zoom account, add your home address. The default address is set to the PKDF office address.



Set your business hours

Business Hours

Mon	Tue	Wed	Thu	Fri	Edit
8:00 AM – 5:00 PM	8:00 AM – 5:00 PM	8:00 AM – 5:00 PM	8:00 AM – 5:00 PM	8:00 AM – 5:00 PM	

Call Handling Edit

- Zoom Applications

Call Handling Ring Mode

Simultaneous

Max Wait Time

30 seconds

When a call is not answered

Forward to voicemail

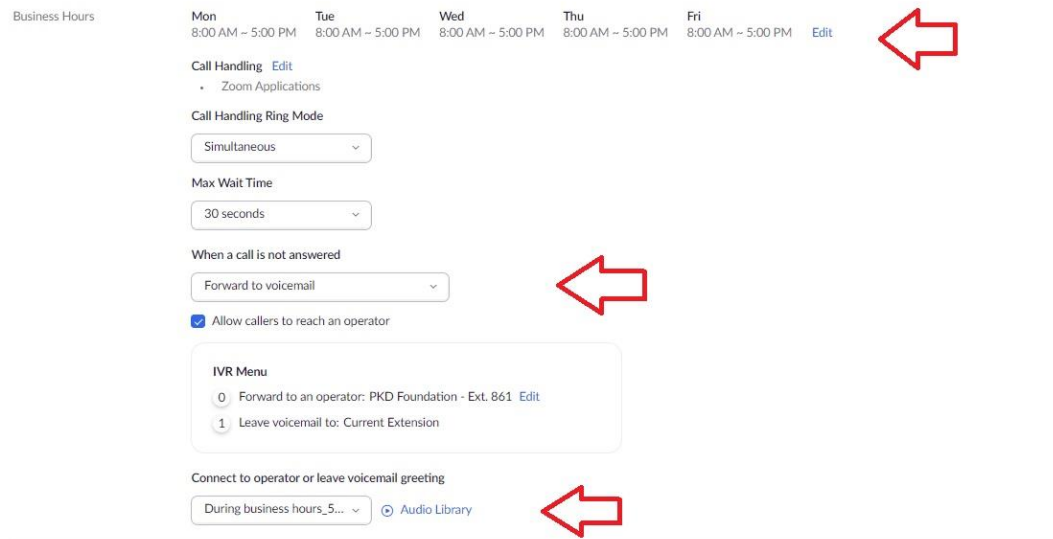
Allow callers to reach an operator

IVR Menu

- 0 Forward to an operator: PKD Foundation - Ext. 861 Edit
- 1 Leave voicemail to: Current Extension

Connect to operator or leave voicemail greeting

During business hours_5... Audio Library



- Click edit to set your business hours.
- These are the hours you expect to be scheduling mentee calls.
- Incoming calls should forward to voicemail if you are not available.
- By allowing callers to reach an operator, if you cannot answer, callers can be redirected to PKDF.
- You can customize your voice mail greeting if you like.



During Business Hours – *Customize your voicemail greeting*

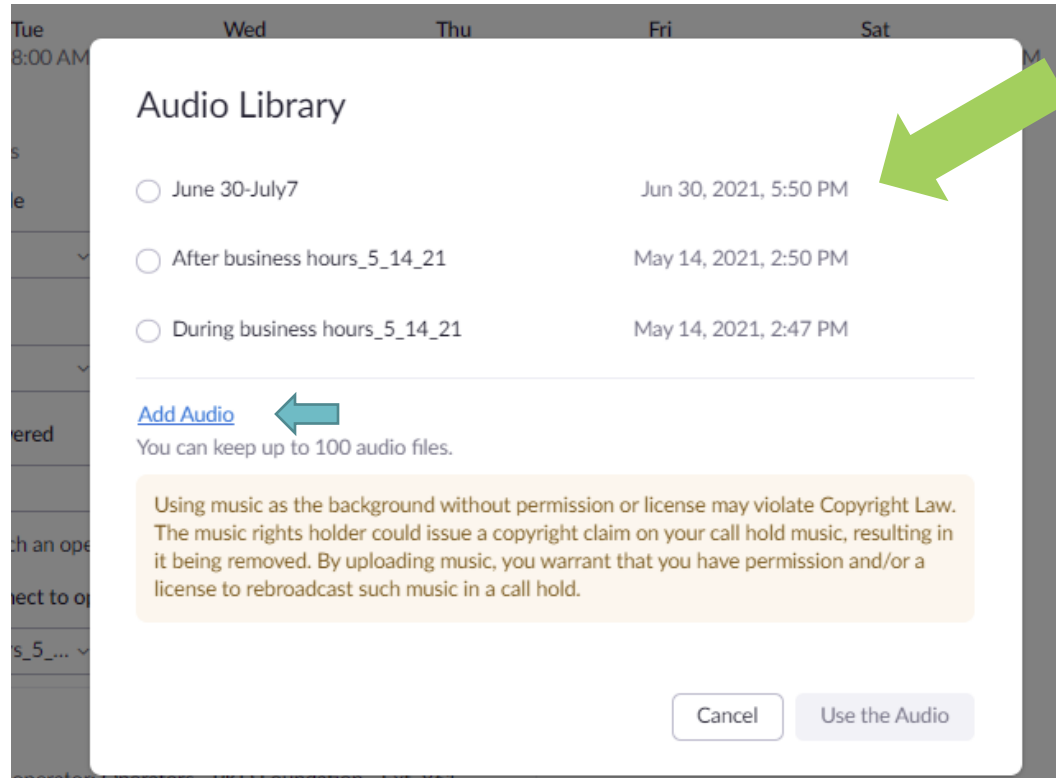
The screenshot shows the Zoom Phone settings interface. On the left is a navigation menu with 'Phone' highlighted. The main area is titled 'Business Hours' and shows settings for Monday through Friday, each with a time range of 8:00 AM to 5:00 PM. Below this are sections for 'Call Handling' (Zoom Applications), 'Call Handling Ring Mode' (Simultaneous), and 'Max Wait Time' (30 seconds). The 'When a call is not answered' section has 'Forward to voicemail' selected and 'Allow callers to reach an operator' checked. An 'IVR Menu' section contains two options: '0 Forward to an operator: PKD Foundation - Ext. 861' and '1 Leave voicemail to: Current Extension'. At the bottom, the 'Connect to operator or leave voicemail greeting' dropdown is set to 'During business hours_5...', with an 'Audio Library' link next to it. Red arrows point to the 'Settings' menu item, the 'Forward to voicemail' dropdown, the 'Audio Library' link, and the 'Edit' link in the top right. Green checkmarks are placed over the 'Zoom Applications', 'Simultaneous', 'Forward to voicemail', and the 'Edit' link.

Click audio library.



Let's record!

Click the pencil icon to name your recording! All recordings will be listed here.



The screenshot shows a mobile application interface for an 'Audio Library'. At the top, there are days of the week: Tue, Wed, Thu, Fri, Sat. Below this, the title 'Audio Library' is displayed. There are three radio button options, each with a date and time: 'June 30-July7' (Jun 30, 2021, 5:50 PM), 'After business hours_5_14_21' (May 14, 2021, 2:50 PM), and 'During business hours_5_14_21' (May 14, 2021, 2:47 PM). A green arrow points to the pencil icon next to the first option. Below the options is a blue link labeled 'Add Audio' with a teal arrow pointing to it. Underneath the link, it says 'You can keep up to 100 audio files.' A yellow warning box contains the text: 'Using music as the background without permission or license may violate Copyright Law. The music rights holder could issue a copyright claim on your call hold music, resulting in it being removed. By uploading music, you warrant that you have permission and/or a license to rebroadcast such music in a call hold.' At the bottom, there are two buttons: 'Cancel' and 'Use the Audio'.

Click on Add Audio



Finish your recording...

Add Audio

[Text to Speech](#) [Record by Computer](#) [Upload](#)

Audio Name

Voice

Message to play

0/3000

Add Audio

[Text to Speech](#) [Record by Computer](#) [Upload](#)

Adjust Volume

Speak to your computer microphone. If the input level does not turn green, adjust the volume slider.

Input Level ■■■■■■■■■■

Input Volume

[Next](#) [Cancel](#)

Add Audio

[Text to Speech](#) [Record by Computer](#) [Upload](#)

[Cancel](#)



Sample Voicemail Script

During business hours

Hello, this is Name, PKD Connect Mentor for the PKD Foundation. I am currently away from my desk, but I look forward to connecting with you soon. Please leave a detailed message and I will return your call as soon as possible. If you need immediate assistance, press 0 to be directed to the PKD Foundation operator. Thank you!



Add your new voice mail recording

Business Hours

Mon	Tue	Wed	Thu	Fri	Sat
8:00 AM ~ 5:00 PM	8:00 AM ~ 5:00 PM	8:00 AM ~ 5:00 PM	8:00 AM ~ 5:00 PM	8:00 AM ~ 5:00 PM	8:00 AM ~ 8:00 PM

[Edit](#)

Call Handling [Edit](#)

- Zoom Applications

Call Handling Ring Mode

Simultaneous

Max Wait Time

30 seconds


When a call is not answered

Forward to voicemail

Allow callers to reach an operator

Greeting & Menu: Connect to operator or leave voicemail

During business hours_5_... [Audio Library](#)



Click Audio Library and choose your new recording. Remember, you can click the pencil icon to name your recordings.



When you are not available...

The screenshot displays the Zoom Phone settings interface. On the left, a navigation menu includes Profile, Meetings, Webinars, Phone (highlighted), Recordings, Settings, Analytics, Account Profile, and Reports. A red arrow points to the 'Settings' option. The main content area is titled 'Call Handling' and includes a warning: 'You have not enabled any items for Call Handling.' Below this, the 'When a call is not answered' section has a dropdown menu set to 'Forward to voicemail' and a checked checkbox for 'Allow callers to reach an operator'. The 'IVR Menu' section lists two options: '0 Forward to an operator: PKD Foundation - Ext. 861' and '1 Leave voicemail to: Current Extension'. The 'Connect to operator or leave voicemail greeting' section has a dropdown menu set to 'After business hours_5_1...' and an 'Audio Library' link. Red arrows point to the 'Forward to voicemail' dropdown, the 'Allow callers to reach an operator' checkbox, and the 'After business hours_5_1...' dropdown.

- Update your phone settings when you are not available to accept calls – “Closed hours”
- Incoming calls will forward to voicemail.
- By allowing callers to reach an operator when you are unavailable, callers can be redirected to PKDF.
- You can customize your voice mail greeting if you like.



Sample voice mail script

During “closed hours”

Hello, this is Name, Title of the PKD Foundation. I am currently unavailable to take calls. Please leave a detailed message and I will return your call as soon as possible. If you need immediate assistance, press 0 to be directed to the PKD Foundation operator. Thank you!



Zoom phone application

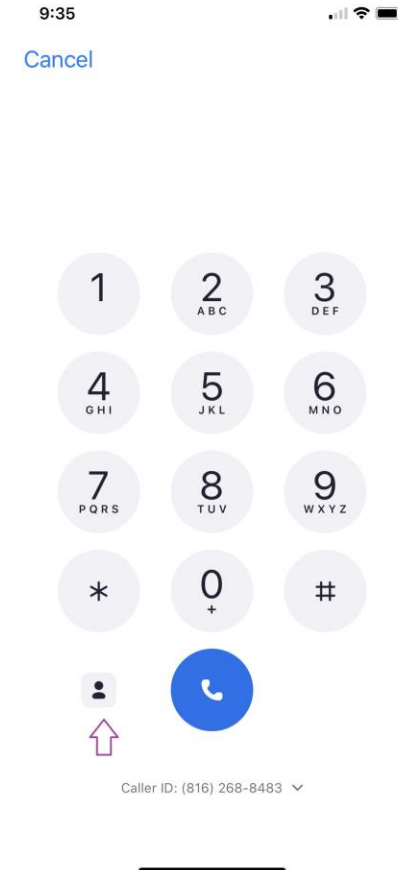
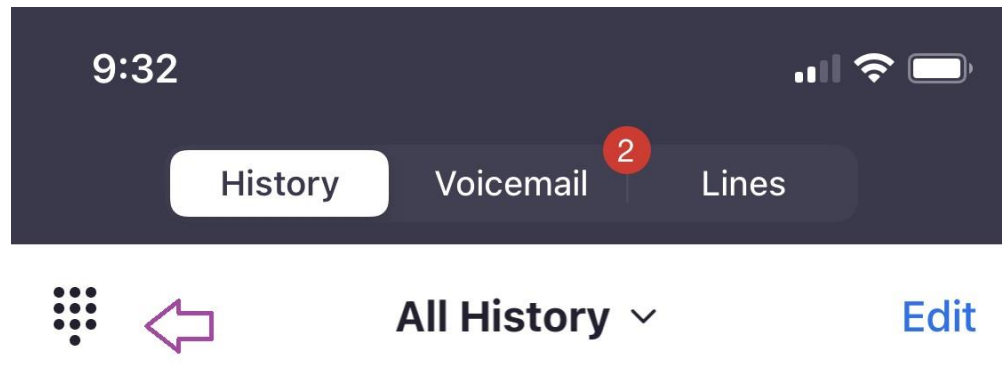
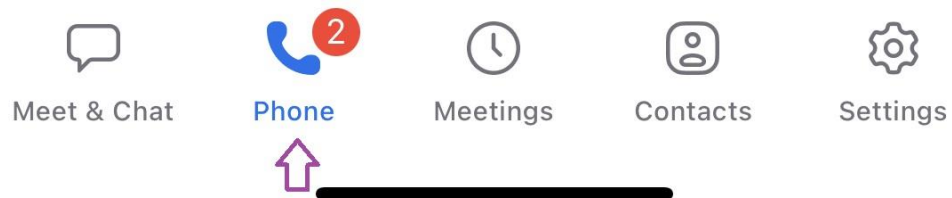
To use the phone application, you will need to download Zoom to your mobile device and sign into your account using your mentor email address and the password provided to you by PKDF.



Download the Zoom app to your mobile device



Mobile application – making a call



You can dial a mentee's number directly or if you have added your mentees to your contacts, you can click the contact icon and choose the mentee you are calling from your saved contacts.



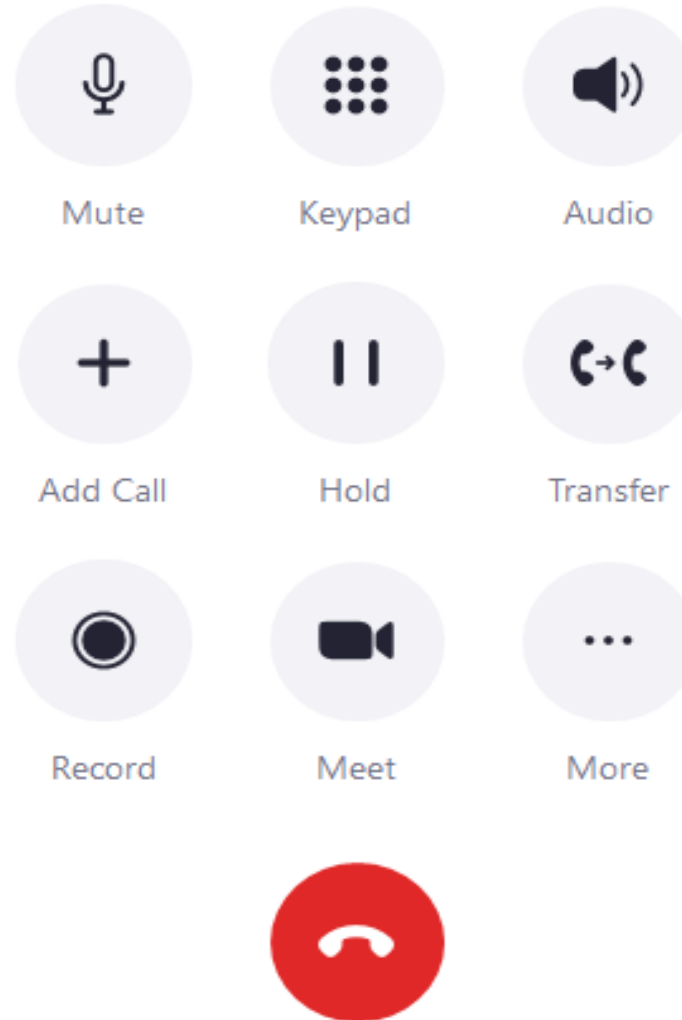
Zoom interface

Add a call

- Up to 3 contacts
- Switch to Meet if more contacts need to be added to the call

Meet

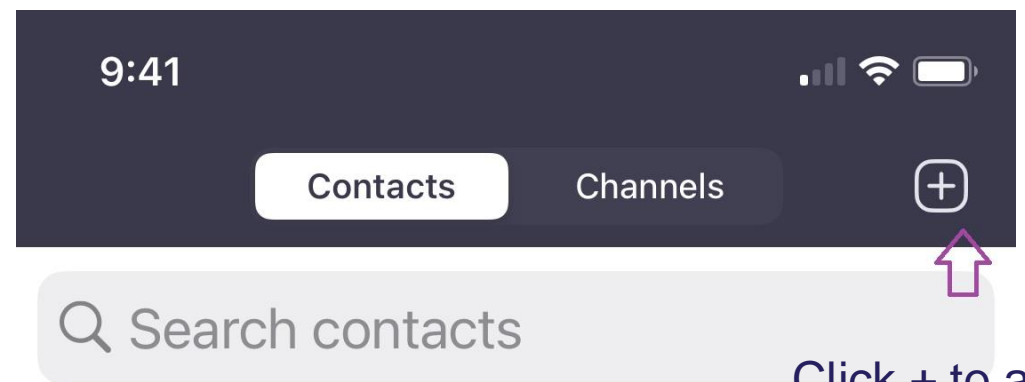
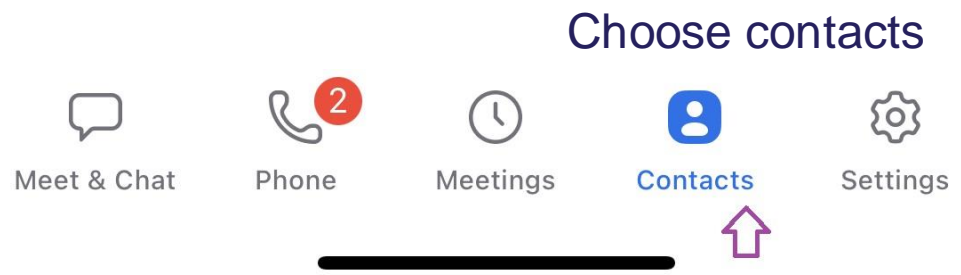
- Switch call to meeting.
Audio will stay connected



- You can transfer a mentee to Nicole for additional assistance if needed.
- Choose “warm” transfer so that you can talk to Nicole before transferring the call. For example you might say: “Hi Nicole, I have Jane on the phone and she has questions about the upcoming webinar, can you chat with her?” Nicole will say yes, and you can transfer Jane to Nicole.
- If Nicole is not available, you can transfer mentee to Nicole’s voice mail.



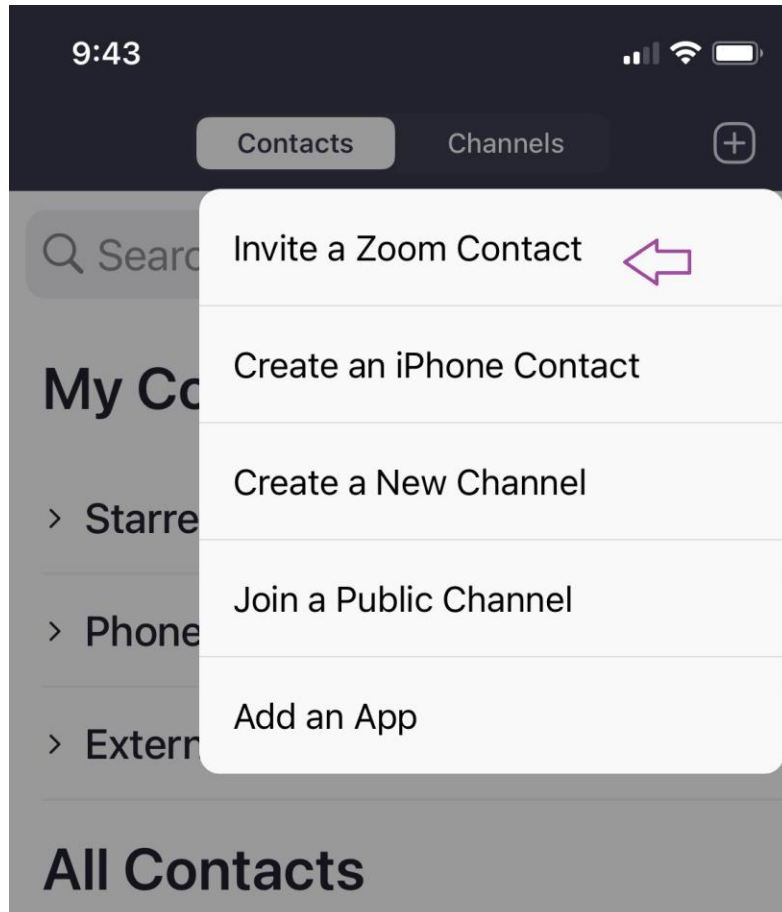
Adding contacts in mobile application



My Contacts



Invite a Zoom contact

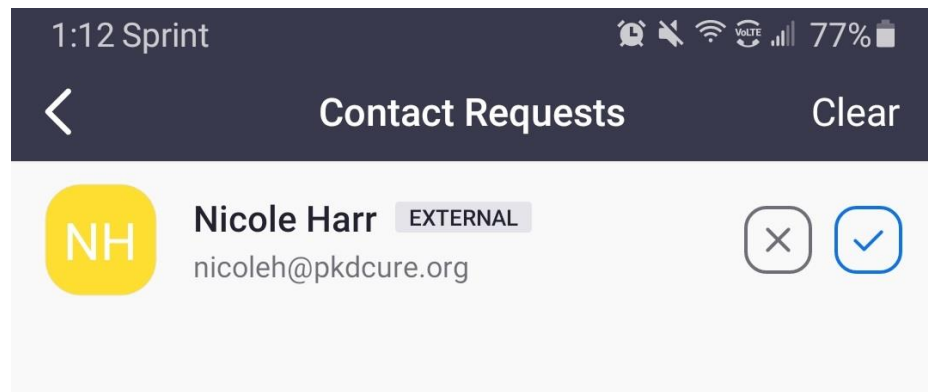


- By clicking “Invite a Zoom Contact” you are inviting your mentee to join you on zoom.
- Your mentee will receive an invitation from you.
- Once your mentee accepts, you will be able to access your mentee contact information in your Zoom contacts.
- And, you will be able to use the chat function within Zoom.



How does this work for your mentee?

If your mentee has a Zoom account



Mentee does not have a Zoom account

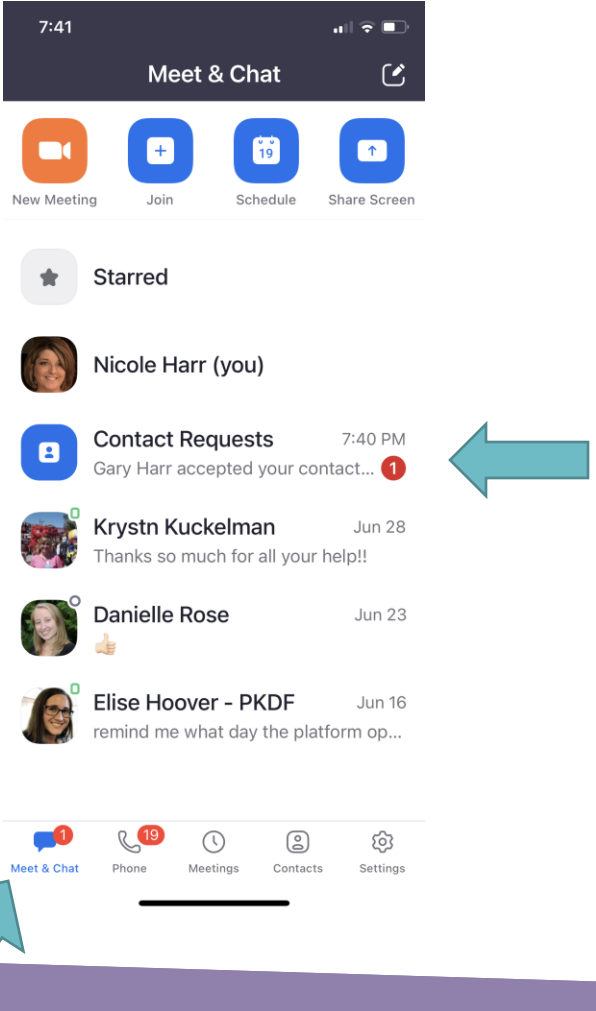
Mentee will receive an email:

From: Zoom

Subject: Zoom Invitation from <mentor name>



Accept Contact Request

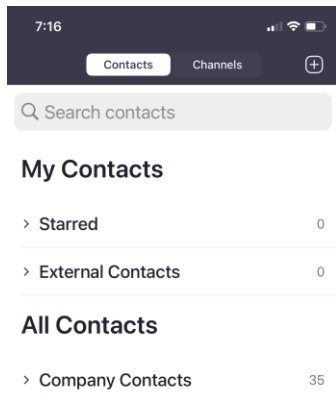


You will receive a notification when your mentee accepts your contact request



Calling your contacts

Navigate to My Contacts

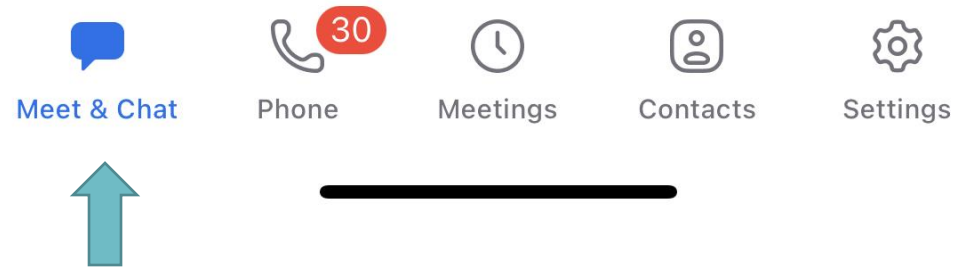


- Navigate to Contacts at the bottom of your screen.
- Expand External Contacts
- All mentees that have accepted your join Zoom request will be listed here.

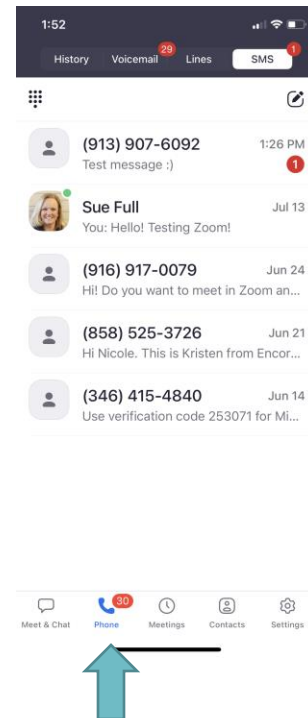


Texting your contacts

Internal Contacts



External Contacts



You can send and receive a text message via SMS with mentees that are not saved in your contacts.



How do I communicate Zoom options to my new mentee?

- PKDF will take the first step by letting new mentees know that we use Zoom to communicate.
 - When PKDF staff sends the initial email introduction to your new mentee, a link to download Zoom will be included.
- Respond to the introduction email.
 - Welcome your new mentee and request a date / time for your first call.
- Invite your new mentee to join you on Zoom.
 - As you are wrapping up the first call with your new mentee, ask your mentee to join you on Zoom. Let your mentee know to expect a request via email.
- It is convenient if your mentee is on Zoom but it is not required.
 - You can still call and text if your mentees if they are not on Zoom.



Summary

- PKD Connect Mentors will use Zoom to connect with mentees. Your Zoom account offers the ability to call, text and video conference.
- You will need to download the Zoom app and sign in using the email and Zoom password provided. Please do not change your password.
- **Next step – meet with Nicole to set up your Zoom account!**



Questions

Contact Nicole Harr

nicoleh@pkdcure.org

peermentors@pkdcure.org

816-268-8483

