Communication Tools: Zoom

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PKD FOUNDATION
Polycystic Kidney Disease

Zoom for peer mentors

Office 365

- Outlook
- OneDrive

Zoom

- Desktop function
- Moble 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

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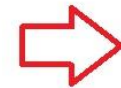
In case of emergency when using your zoom account, add your home address. The default address is set to the PKDF office address.

Set your business hours

- 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*

Click audio library.

Let's record!

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

Click on Add Audio

Audio Library
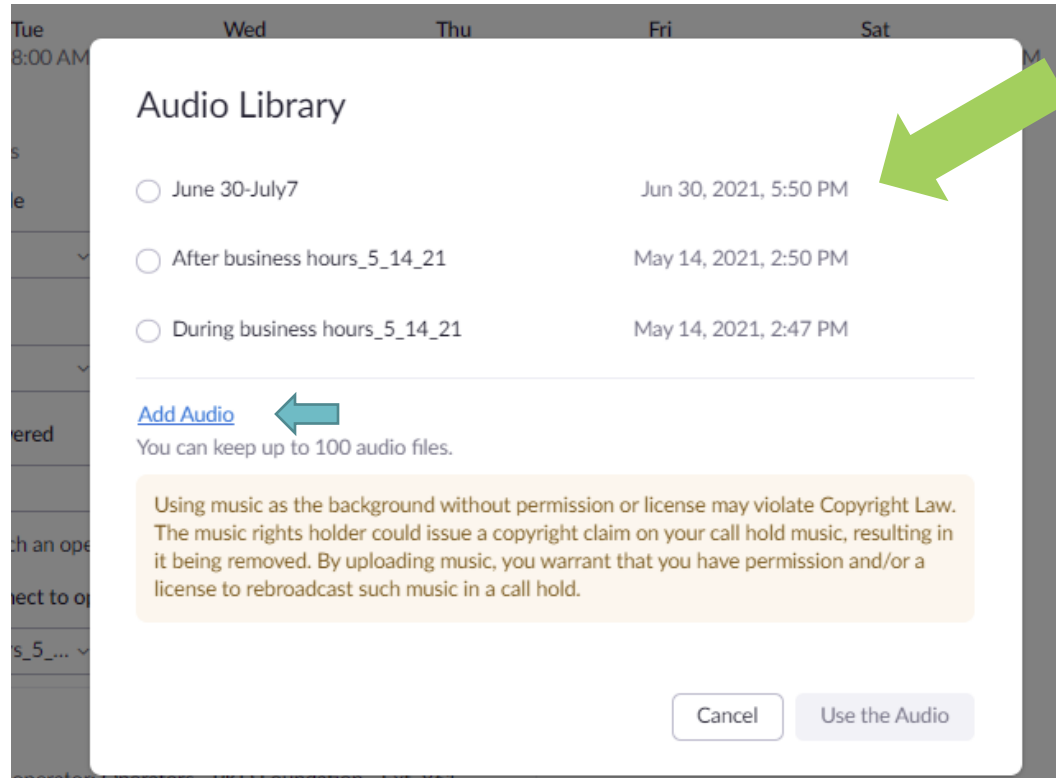
○ June 30-July7   Jun 30, 2021, 5:50 PM

○ After business hours_5_14_21   May 14, 2021, 2:50 PM

○ During business hours_5_14_21   May 14, 2021, 2:47 PM

Add Audio
You can keep up to 100 audio files.

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.

Cancel   Use the Audio

Finish your recording...

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...

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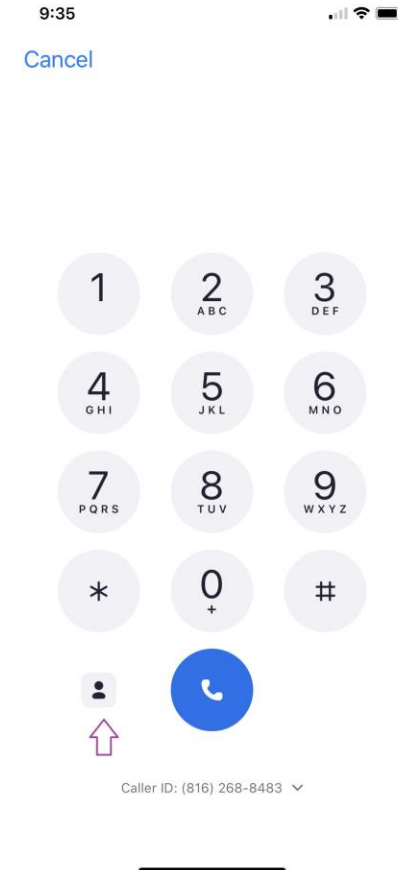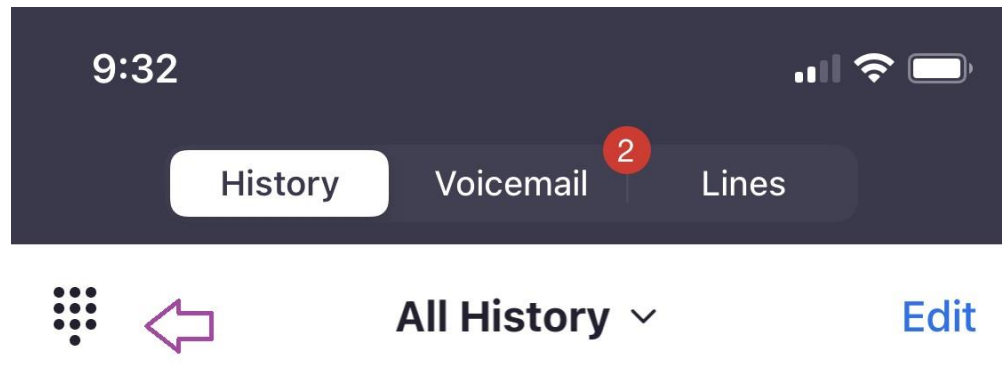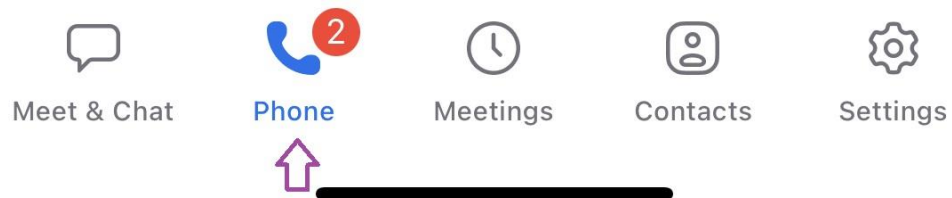
You can dial a mentee's number directly or if you have added your mentees to your contacts, you can click the contact icon and choose the mentee you are calling from your saved contacts.

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

Mute	Keypad	Audio
Add Call	Hold	Transfer
Record	Meet	More
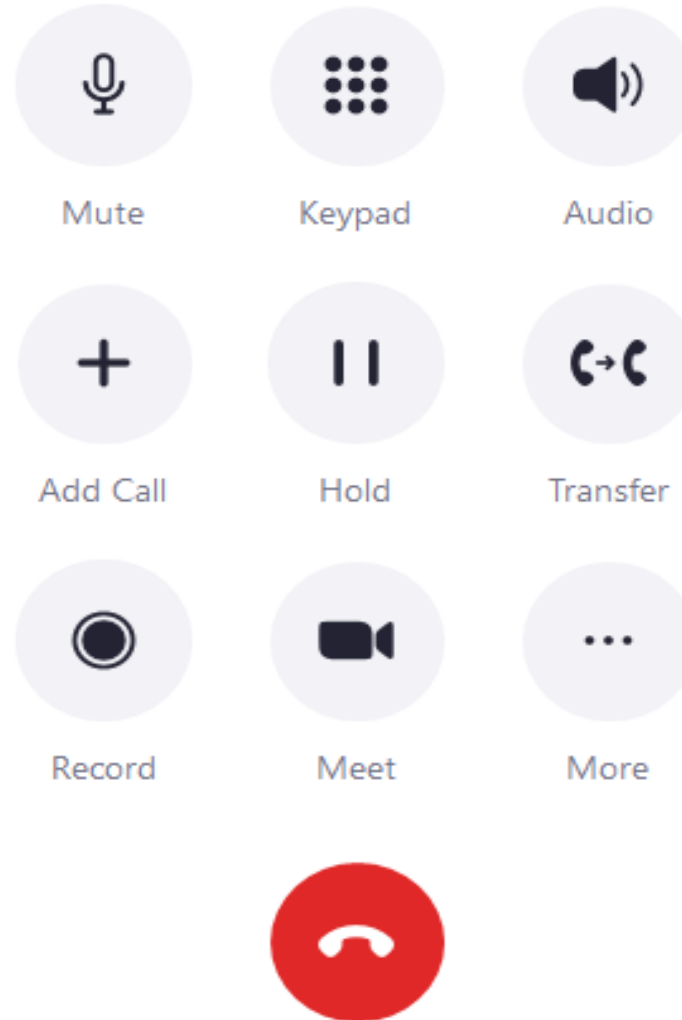
- You can transfer a mentee to Nicole for additional assistance if needed.
- Choose "warm" transfer so that you can talk to Nicole before transferring the call. For example you might say: "Hi Nicole, I have Jane on the phone and she has questions about the upcoming webinar, can you chat with her?" Nicole 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

Choose contacts

Meet & Chat   Phone   Meetings   **Contacts**   Settings

Click + to add a contact

9:41

Contacts   Channels   +

Search contacts
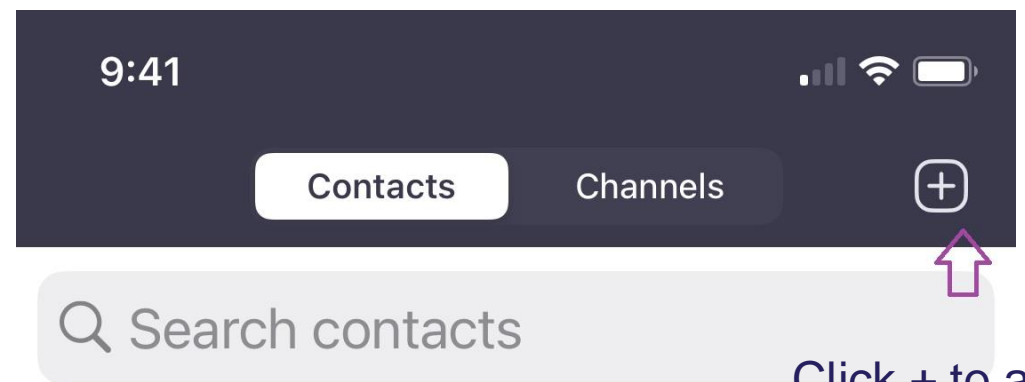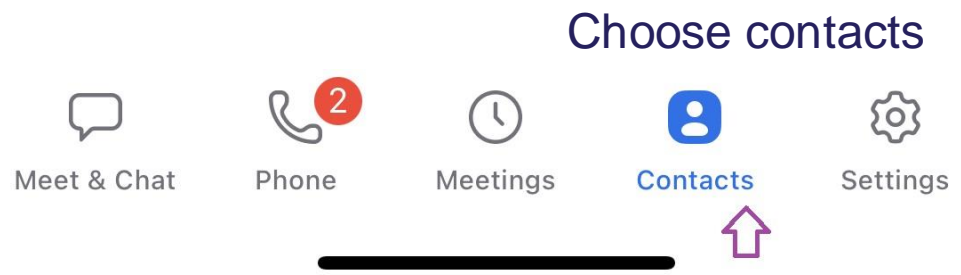
My Contacts

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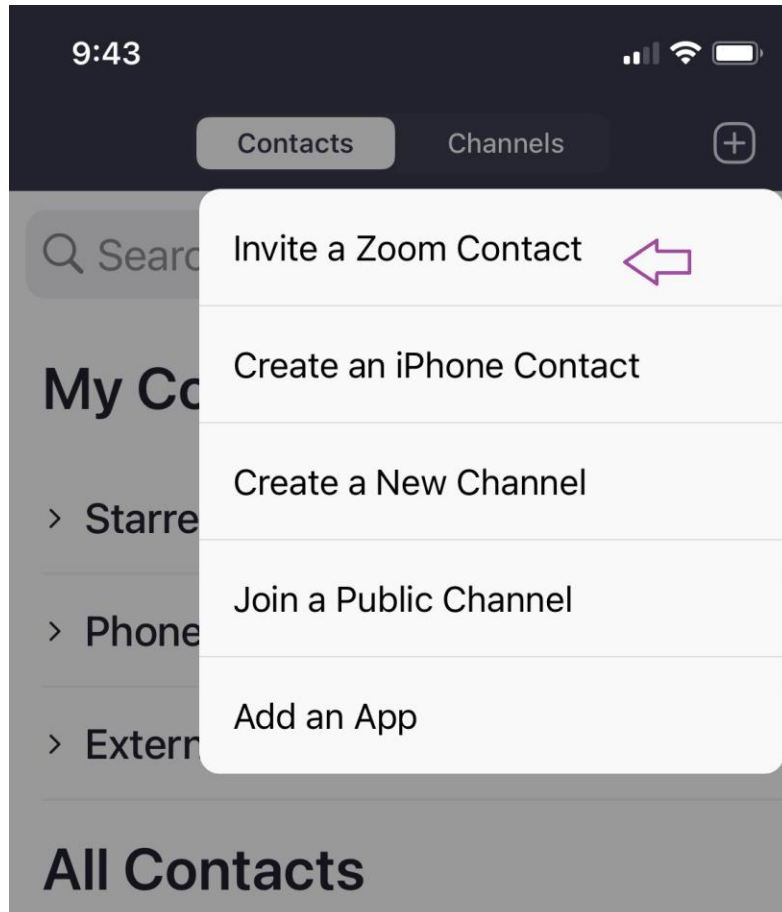
- By clicking "Invite a Zoom Contact" you are inviting your mentee to join you on zoom.
- Your mentee will receive an invitation from you.
- Once your mentee accepts, you will be able to access your mentee contact information in your Zoom contacts.
- And, you will be able to use the chat function within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

How does this work for your mentee?

If your mentee has a Zoom account
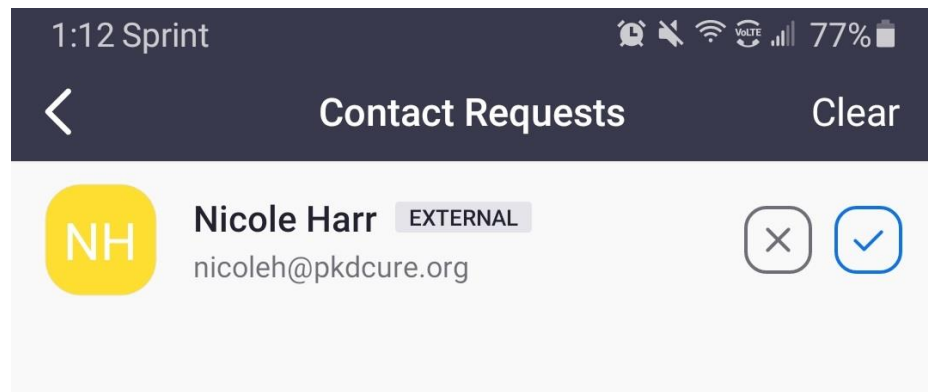
Mentee does not have a Zoom account

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
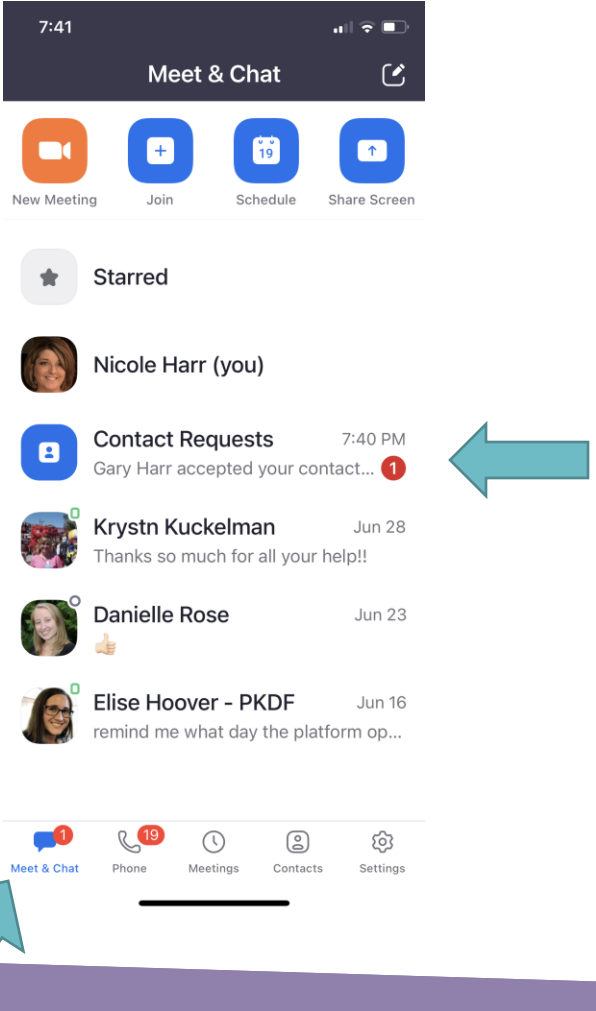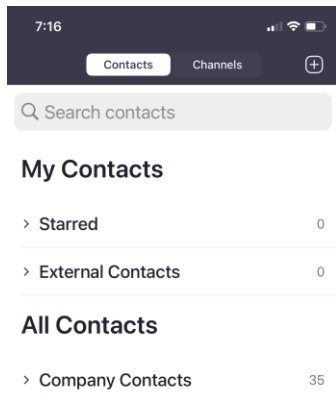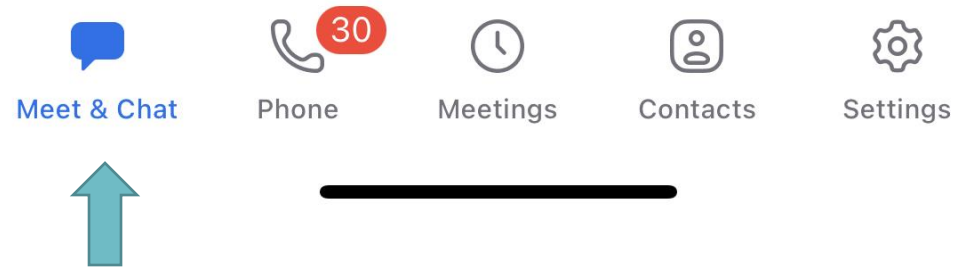

- Navigate to Contacts at the bottom of your screen.
- Expand External Contacts
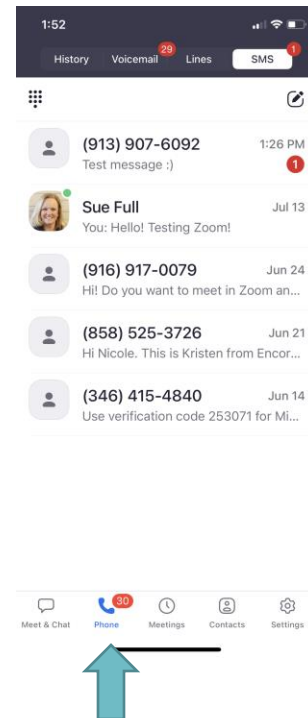- All mentees that have accepted your join Zoom request will be listed here.

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

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peermentors@pkdcure.org

816-268-8483