

TIP SHEET: Zoom

Zoom Instructions for your Q-PASS Virtual Review

Making sure you are set up for your Transforming Virtual Review.



BEFORE YOUR FIRST VIRTUAL REVIEW...

Sign up for a free Zoom account

- ✓ To sign up for your free account, visit zoom.us/signup and enter your email address. You will receive an email from Zoom (no-reply@zoom.us). In this email, click Activate Account.
- ✓ A Zoom account is required. Signing up for a free Zoom account prior to your next scheduled virtual review will save you time.

JOINING THE VIRTUAL REVIEW FROM Q-PASS

Sign into Q-PASS using your user details

1. From the home screen, locate the virtual review port link as picture below

NCQA Q-PASS [Home](#) Welcome, UAT Customer

You have upcoming virtual reviews.

2:30 pm - 4:30 pm on Friday, October 9th with Customer Name at Zoom VR [[Test]] Organization

[Click here to visit the virtual review portal](#)

On your Q-PASS home screen, 15 minutes before your scheduled start time, click here to access the link for your virtual review hosted in Zoom.

2. Next, on the Virtual Review Portal screen the link to the meeting will be accessible 15 minutes before the scheduled start time

NCQA Q-PASS [Home](#) Welcome, Production Customer

Thursday, October 15th

12:45 pm - 2:45 pm

with your evaluator **Production Evaluator**

The following programs will be included in this review:

Program	Practice site
PCMH	V2.4 Best [[Test]] Org 2 Site 4

[Click here to join the meeting](#)

To join the virtual review using [Zoom Web Client](#) click this link.

To join the virtual review using [Zoom Desktop Client](#) click this link.

Note: If you're having problems joining in the web browser or prefer to use the zoom client, [click here](#)

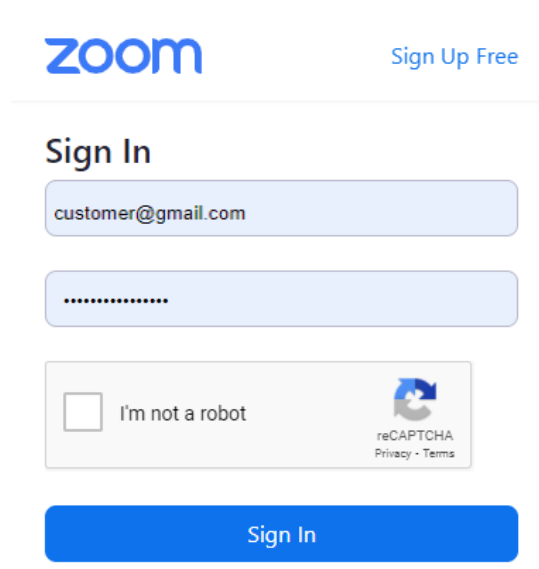
3. When prompted, sign into your Zoom account
 - a. If you do not have a Zoom account yet please select the link Sign Up Free below the sign in field.
 - b. If you have already signed up for a Zoom account, select Sign in Zoom

Sign in

A rectangular button with a blue Zoom logo icon on the left and the text "Sign in Zoom" in the center.

No Zoom account ? [Sign Up Free](#)

- c. A new window will open for you to enter your username (email address) and password. Once filled in, check the CAPTCHA box *I'm not a robot*. Select Sign In.

A screenshot of the Zoom sign-in page. At the top left is the Zoom logo, and at the top right is a link for "Sign Up Free". Below the logo is the heading "Sign In". There are two input fields: the first contains the email address "customer@gmail.com" and the second contains a series of dots representing a password. Below the password field is a reCAPTCHA box with an unchecked checkbox and the text "I'm not a robot". To the right of the checkbox is the reCAPTCHA logo and the text "reCAPTCHA Privacy - Terms". At the bottom of the form is a large blue button with the text "Sign In".

Zoom Web Client vs. Zoom Desktop Client

The Zoom **Web Client** allows joining a Zoom meeting or webinar without downloading any plugins or software. However, the **Web Client** has limited features and functions best on Google Chrome, Mozilla Firefox, and Chromium Edge.

NCQA recommends using Google Chrome as both Zoom and Q-PASS can function at maximum capacity.

If you experience audio or screen sharing issues when using Mozilla Firefox, Chromium Edge or are using any other browser than those recommended above, Zoom recommends installing and launching the **Desktop Client**. You can continue to use the **Web Client** if you can switch your browser and utilize it.

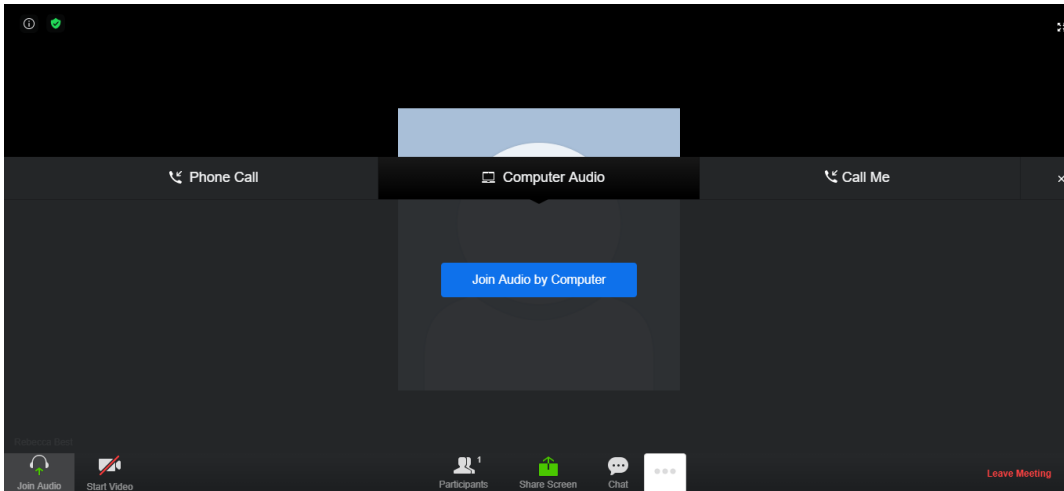
If using the Zoom Web Client continue with step #4. If you are using the Zoom Desktop Client skip to step #12 on page six.

Using Zoom Web Client

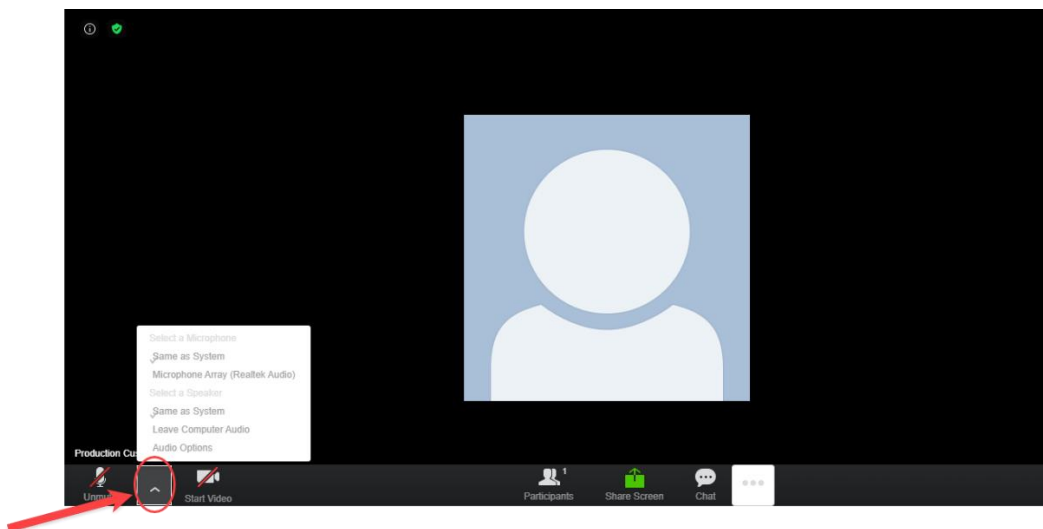
4. Once signed into your Zoom account, you will be able to access the Zoom meeting for your Virtual Review.
 - a. The meeting will open in a new tab within your browser

AUDIO OPTIONS

5. You will be prompted to select the audio you will be utilizing (see screen shot below)



- a. Select your preferred audio option. You can join the audio by computer, dial in by telephone, or choose call me.
 - i. Phone Call: Follow the instructions on the screen for dialing in by phone.
 - ii. Computer Audio: Click Join Audio By Computer. After joining computer audio, you can Mute/Unmute at the lower left corner or click on the ^ to select a different microphone and/or speaker.
 - iii. Call Me: Choose the country of the phone you are calling from the drop down. Enter the phone number. Check Remember the number on this computer if you would like this number stored for future meetings. Click Call Me.



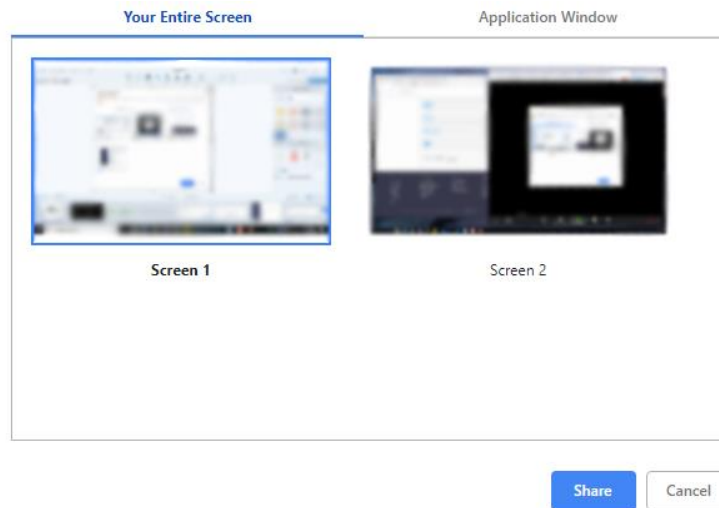
- b. Once selected, if you need to change your audio option, select the arrow beside the Mute/Unmute button located at the bottom left hand side of the screen.

INVITING OTHERS

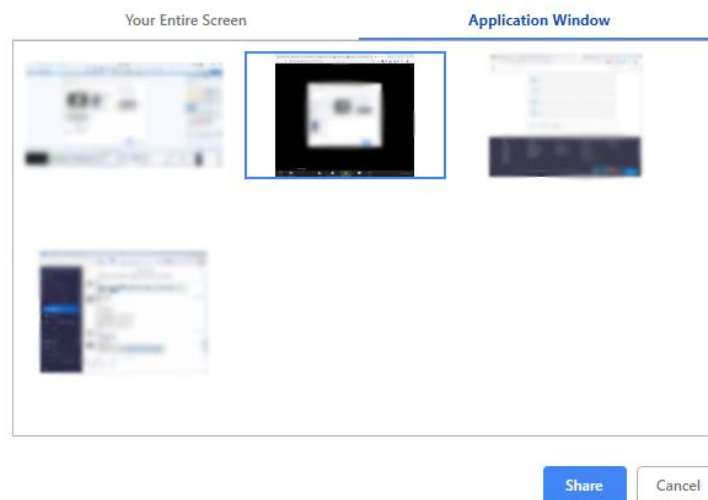
6. Although, the Web Client has an option to invite others to the meeting, this function is not available when using the Web Client. **All attendees must access the link through Q-PASS.**

SHARING YOUR SCREEN

7. Click Share Screen located in your meeting tool bar.
8. Select the screen you want to share then click Share. If you are using multiple monitors, you will see each screen.



- a. To share a specific application window, click the Application Window tab, select an application, then click Share.
 - i. When sharing an application, live changes made to a document may not appear for others. If you experience this issue, please stop sharing and restart the share or share your entire screen to avoid this issue.
 - ii. For Windows 10 users, if several applications are open, a limited number will be listed as an option to share. If the application you want to share is not listed, close unnecessary applications and try again.



9. While screen sharing, you will have access to the following controls:

- a. A notification at the top of your Zoom meeting window shows a preview of your shared screen. Click Pause Share to pause screen sharing.



- b. Click Resume Share to start screen sharing again. You can also click Stop Share to stop sharing your screen.

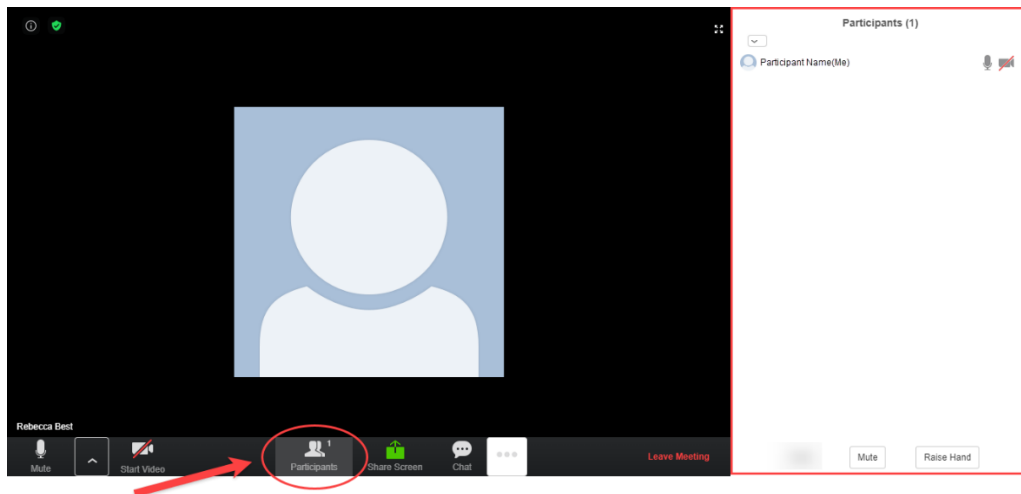


- c. A floating notification bar appears on top of your browser. Click Stop sharing to stop sharing your screen. Click Hide to remove the floating notification bar.

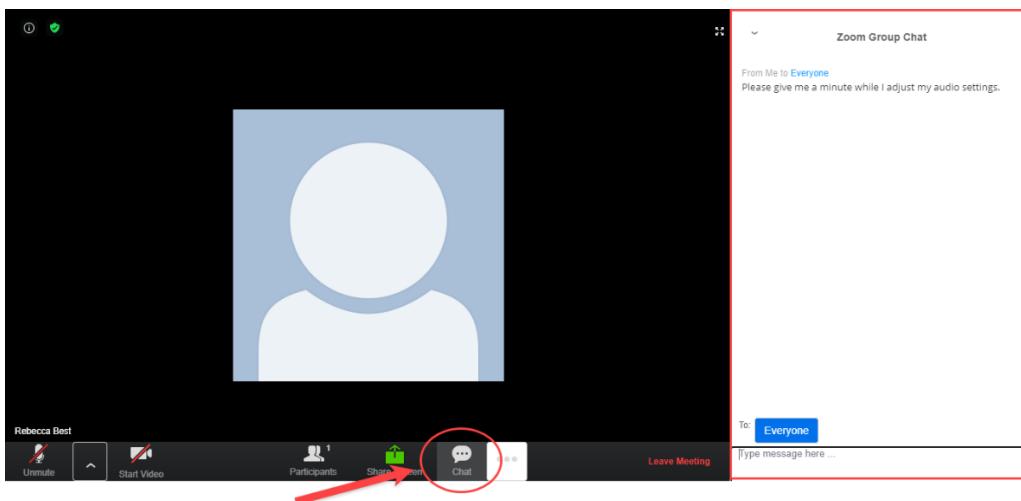


OTHER FEATURES

- 10. To view the participants attending the Zoom meeting for your virtual review, select Participants located in your meeting tool bar and the Participants bar will open on the right of the screen.

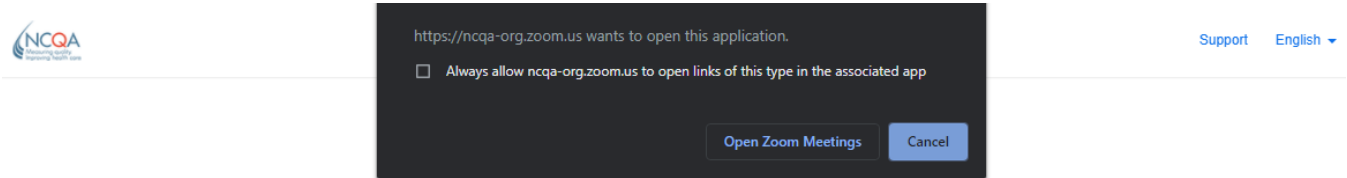


- 11. To utilize the Chat feature, select Chat located in your meeting tool bar and the Chat bar will open on the right of the screen.



Using Zoom Desktop Client

12. Once signed into your Zoom account, you will be able to access the Zoom meeting for your Virtual Review.
 - a. In your browser, you will be prompted to [Open Zoom Meetings](#).
 - b. Once selected, the meeting will launch in the Zoom application if installed.
 - i. If you haven't installed the Zoom Client, the option to do so is located on the screen. Simply select [download and run Zoom](#).

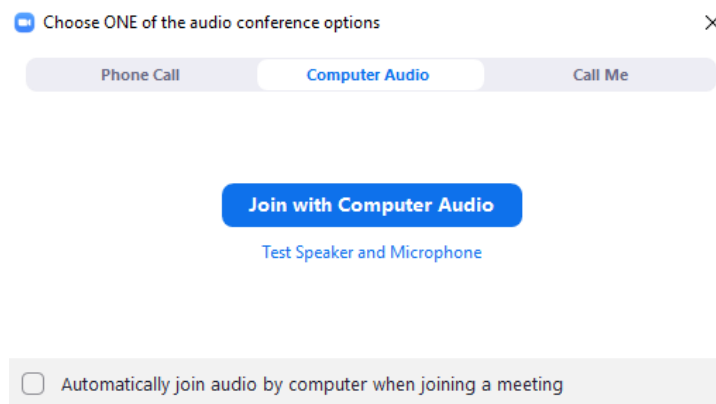


When system dialog prompts, click **Open Zoom Meetings**.

If you have Zoom Client installed, [launch meeting](#). Otherwise, [download and run Zoom](#).

AUDIO OPTIONS

13. When the Zoom window opens, you will be prompted to select the audio you will be utilizing (see screen shot below)

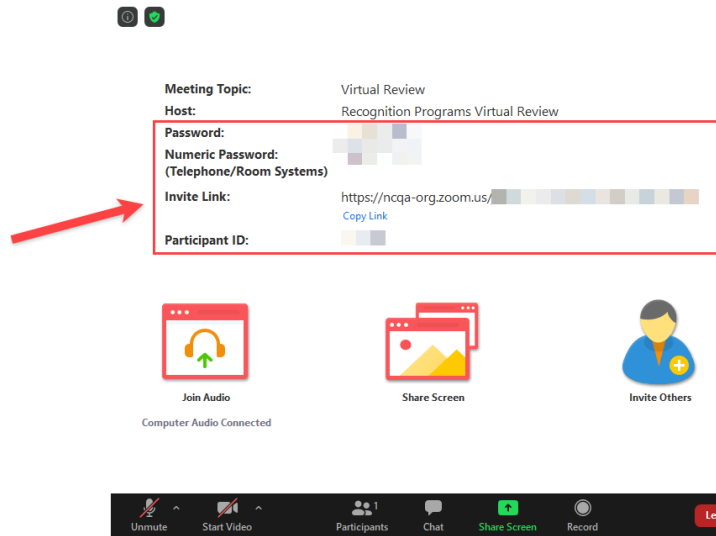


- a. Select your preferred audio option. You can join the audio by computer, dial in by telephone, or choose call me.
 - i. Phone Call: Follow the instructions on the screen for dialing in by phone.
 - ii. Computer Audio: Click Join Audio By Computer. After joining computer audio, you can Mute/Unmute at the lower left corner or click on the ^ to select a different microphone and/or speaker.

- iii. Call Me: Choose the country of the phone you are calling from the drop down. Enter the phone number. Check Remember the number on this computer if you would like this number stored for future meetings. Click Call Me.

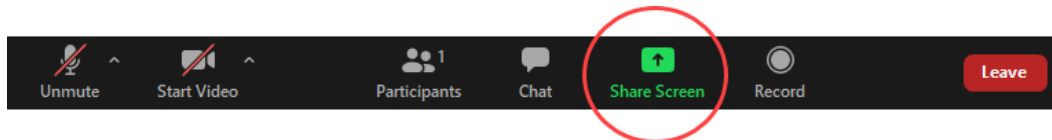
INVITING OTHERS

- 14. Once you join the meeting, the Zoom window will display the meeting information.
 - a. Copy the link and share it with individuals who you want to participate in the virtual review.
 - b. The password and participant ID is also displayed.
 - c. Anyone joining the Zoom virtual review using the Zoom Desktop Client will also need to have registered for a free Zoom account in order to join the meeting.

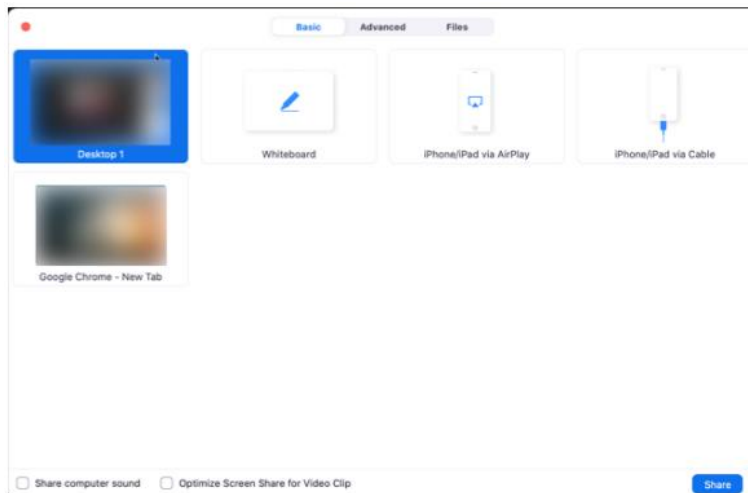


SHARING YOUR SCREEN

- 15. Click the Share Screen button located in your meeting controls.



- a. Select to share your entire desktop, a specific application window or whiteboard.



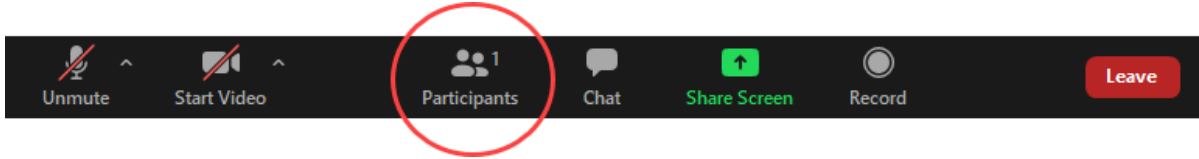
- b. Files: Share a file from a third-party sharing service like Google Drive or Microsoft OneDrive. Follow the on-screen prompts to sign into the third-party service and grant Zoom access.
 - i. Note: Alternatively, you can open the file in a web browser then share the browser window. For example, to share a Google doc, open the doc in Chrome, then share the Chrome window. The result is the same as using the sharing options in the Files tab.

16. Click Share.

- a. Zoom will automatically switch to full screen to optimize the shared screen view. To exit full-screen, click Exit Full Screen in the top-right corner or press the Esc key.

OTHER FEATURES

17. To view the participants attending the Zoom meeting for your virtual review, select Participants located in your meeting tool bar and the Participants bar will open on the right of the screen.



18. To utilize the Chat feature, select Chat located in your meeting tool bar and the Chat bar will open on the right of the screen.

