



## CASE MANAGEMENT SOCIETY OF AMERICA

### Items to Consider When Shifting Your Chapter Meeting Virtual

**Mission:** In the event of a virtual meeting, the Chapter President and Officers are responsible for determining the format of the Chapter meetings. Shifting meetings from in-person or via telephone to a virtual format with video brings new challenges to planning a meeting. Luckily these challenges can all be prepared for in advance. This guide will help you shift your chapter meeting to a virtual platform like Zoom and avoid common problems in that process.

**Operations and Considerations:** The Chapter President and Officers must make the following considerations, with help from the Executive Office.

- **Dates:** Will the dates remain the same as the original in-person conference, or will the dates shift to accommodate weekends and holidays?
- **Time Zones:** The time zone during which live content will run should be considered in the planning process. This is especially true for events expected to draw large numbers of persons from other chapters, national CMSA or outside the United States.
- **Timing:** Discussion will be needed in advance about the speaking times for any potential speakers and the meeting agenda. The start and end time for the meeting should be clearly communicated to all involved. It is helpful to allot time on the agenda for each discussion item. This helps hold those discussing to an efficient and designed meeting structure.
- **Networking Opportunities:** Even virtual meetings can have networking opportunities! The majority of these fun networking sessions will benefit from having a designated moderator identified in advance; the moderator should make sure that conversation occurs and that questions are answered, particularly when large numbers of persons participate. This is critical for making the networking event a smooth success. For broad topics or session Q&A with several presenters, consider novel networking set-ups such as topical breakout rooms within a single networking session. This method may provide opportunity for small group conversations that model in-person networking. Consider not recording networking sessions to promote open conversations. Examples of networking opportunities include:
  - Gamification, including virtual scavenger hunts designed to promote attendance in live or recorded sessions
  - Raffles or other giveaways
  - Virtual Networking Hours
  - Exhibitor Hours
  - Q&A Sessions with Presenters
- **Building Breaks into the Meeting:** Organizers should take care to build opportunities for attendees to shift between programs or have short breaks. Consider building 5 min periods between topics or meetings to enable transitions between meeting rooms and longer 30- min breaks after a block of 2-3 hours of continuous discussion or content. Networking periods can be added to these breaks to provide opportunity for continuous

engagement that fluctuates between highly and less structured programming. This may help attendees to remain engaged throughout the day. Networking can include scheduled Q&A with recent presenters or novel topics. Take care to schedule breaks in a way that works for persons across time zones (e.g., lunch for east coast and west coast times).

- **Distribution of Live Content Links:** Links for live virtual meetings should generally be individual Zoom (or other) links that are embedded into the agenda and also emailed prior to the day of the meeting. Closed meeting components (such as the business meeting or CMSA Chapter Officer Meeting) should be password-protected and distributed to qualified members. If there is interest in retaining attendees between specific sessions, consider using the same Zoom room for those sessions such that all attendees will immediately role over into the next session. Otherwise links should be independent to prevent conversations that run long from disrupting the subsequent session.
- **Promoting Attendance:** Consider creative strategies to encourage attendance. It may be valuable to provide members opportunities to familiarize themselves with viewing content virtually in advance of the meeting and prior to closure of early bird registration. This may include taping and distributing short “teasers” from high profile speakers or impactful sessions to increase enthusiasm for attending the meeting. Also consider providing a live session available outside of registration (with RSVP) to provide members who are ambivalent about registering an opportunity to sample the virtual meeting content and encourage registration and attendance.

**Virtual Meeting Supplements:** The CMSA National Executive Office has developed virtual meeting guides to assist attendees and presenters\speakers in accessing the virtual meeting platform.

- Virtual Meeting Presenter Guides
- Virtual Meeting Attendee Guides



# VIRTUAL PRESENTER GUIDE



## 2020 VIRTUAL MEETING PRESENTER OR MODERATOR GUIDE

This guide contains two helpful sections for those moderating/hosting a Zoom virtual CMSA Chapter meeting or simply presenting during the meeting.

### As a host/moderator, you will be required to:

- 1) Arrive in your virtual meeting room at least **10 minutes** prior to the start of the session to:
  - a. Meet with any presenters to articulate the discussion format and the meeting expectations.
  - b. Verify with the presenters that the Zoom room is working properly.
  - c. Confirm that all speakers have their presentations ready for screen sharing during the session. Test the sharing system for any speakers that are unsure or new to Zoom.
  - d. Explain to the speakers how you may use the chat box to communicate with them during the meeting.
- 2) Please be sure your computer is muted until it is your time to speak.
- 3) **Introduce the speakers and begin the meeting.**
- 4) **Keep track of the time.**
- 5) **Facilitate the meeting agenda. Should the meeting require the use of Zoom's Q and A feature, [click here](#) for information on enabling and using the feature.**
- 6) Thank all the presenters at the end of the session.

### As a presenter, you will be required to:

1. Arrive early to test any slides or video you may be sharing, your camera, speakers, and microphone. Should you have technical difficulties during the live session, contact the host or moderator.
2. The moderator will ensure you have appropriate permissions during the meeting. Please be sure your computer microphone is **muted until it is your time to present**.
3. The moderator will welcome all the attendees, provide session housekeeping details, and introduce the speakers at the appropriate time, or proceed with the meeting agenda.
4. **When it is your time to present:**
  - a. The moderator will provide you access to share your screen. Please be sure your slides are open on your computer and ready to present when the meeting starts, and presenter view is turned off.
  - b. **Unmute yourself** and turn your **video on during presentation**.
  - c. During your portion of the presentation, meeting attendees will see your slides and hear your audio.
  - d. We encourage you to place a photo of yourself and your contact information as the first slide so attendees can know who is talking.
  - e. You will have control to advance your slides as needed.
5. Once your presentation is complete, click "**Stop Share**" to give control back to the Host/Moderator.
6. **Questions & Answers (if applicable):**
  - a. Attendees will be able to ask questions via a Q&A button at the bottom of their screen.
  - b. Moderators will monitor the questions and hold all questions until the Q&A portion of the session.
  - c. At the beginning of the Q&A portion, the moderators will ask presenters to turn their video on.
  - d. Video capabilities will be turned on during Q&A periods so attendees can see who is answering the question.

**7. Additional helpful tips:**

- a. It is best to not include videos in your presentation. Videos depend on internet bandwidth to view and may cause lag in the attendees' experiences. If you have a video you would like to share, it is best to share your video link with the attendees or email the attendees after the session.
- b. If you are unable to share your screen during your presentation, please advise the room host at the beginning of the session. Room host will share your presentation and give you access to advance the slides from the moderator's screen.
- c. Please be sure you are in full presentation mode of Power Point and you are not sharing the presenter screen with your notes and view of the next slide.



# ZOOM USER GUIDE & FAQs



## CMSA 2020 VIRTUAL CHAPTER MEETINGS

*Zoom Meeting Links should be Sent the Week of the conference.*

1. Click on the meeting link to open Zoom and enter the meeting.
2. Enter your name and email address so others in the room will know who you are.
3. Click 'full screen' to make the meeting screen cover the entirety of your display.
4. To submit a question – point mouse to the bottom of the screen and a Q&A button will pop up.
5. Once the Q&A button has been clicked, a dialogue box pops up.
6. Enter your question and select if you would like it sent to all panelists or a specific panelist.  
Questions will be answered at the end of each session.

## GETTING STARTED WITH ZOOM

1. **Where do I download the latest version of Zoom?**  
You can download the latest version of Zoom from our Download Center. [Learn more about downloading Zoom.](#)
2. **How to I use Zoom on my PC or Mac?**  
[After downloading Zoom, learn how to use the Zoom Desktop Client.](#)
3. **How do I sign up for Zoom?**  
You can sign up for a free Zoom account at [zoom.us/signup](https://zoom.us/signup).

## JOINING A MEETING

1. **How do I join a Zoom meeting?**  
You can join a meeting by clicking the meeting link or going to [join.zoom.us](https://join.zoom.us) and entering in the meeting ID. [Learn more about joining a meeting.](#)
2. **How do I use my computer/device's audio instead of using a phone?**  
On most devices, you can join computer/device audio by clicking Join Audio, Join with Computer Audio, or Audio to access the audio settings. [Learn more about connecting your audio.](#)
3. **Can I Use Bluetooth Headset?**  
Yes, as long as the Bluetooth device is compatible with the computer or mobile device that you are using.

#### 4. **Do I have to have a webcam to join on Zoom?**

While you are not required to have a webcam to join a Zoom Meeting or Webinar, you will not be able to transmit video of yourself unless you do. Without a webcam, you will be able to listen and speak during the meeting, share your screen, and view the webcam video of other participants.

### **TIPS**

1. You can enter and exit the meeting as often as you need. To exit the meeting, click the red “exit meeting” on the bottom right-hand of your screen.

### **TROUBLESHOOTING LINKS**

- **My video/camera isn't working.**  
[Read tips on troubleshooting a camera that won't start or show video.](#)
- **There is echo in my meeting.**  
Echo can be caused by many things, such as a participant connected to the meeting audio on multiple devices or two participants joined in from the same room. If a speaker has an open mic and is using speakers while talking the feedback loop between their speakers and microphone will cause echo and a high-pitched noise.  
[Learn about common causes of audio echo.](#)
- **My audio isn't working on my mobile device.**  
[Read tips on troubleshooting audio that isn't working on your iOS or Android device.](#)