Zoom Hearing Account Setup Instructions

1. Open the Invitation from Zoom in your email account.
2. Click the button labeled "Activate Your Zoom Account."
3. The system will take you to a website that allows you to "Sign in with Google," "Sign in with Facebook," or "Sign up with a Password." **OCA recommends that you click "Sign up with a Password."**
4. If you "Sign up with a Password," the system will ask you for your name and a password that meets the listed criteria. Once you enter the password and confirm the password, click "Continue."
5. The system will provide a "Personal Meeting URL." Please take note of this web address.
6. Click "Go to My Account."
7. On the Profile tab, you can review the settings for your account. Unless you are in the Mountain Time Zone, you likely need to make no changes. If you are in the Mountain Time Zone, you may need to edit the time zone on this page by clicking "Edit" and making the change.

Zoom Scheduled Hearings Instructions (Recommended)

1. To use Zoom for scheduled hearings:
   a. Click the "Meetings" button on the left panel. (This may or may not be necessary – you may just need to skip to step 2).
   b. Click the "Schedule a New Meeting" button near the top.
   c. Fill in the information on the Schedule a Meeting page, as appropriate.
      i. Topic – OCA recommends listing some identifier for the hearing, such as the case number, docket type, etc.
      ii. Description – This is optional but can be used to enter additional information about the proceeding.
      iii. When – Enter the date and time of the proceeding. Zoom only allows scheduling on the half hour. If the hearing is set to start at a time that is not on the half hour, set the start time to the half hour preceding the time of your hearing.
      iv. Duration – Enter an estimated length of the proceeding.
      v. **Meeting ID: Generate Automatically**. *Never use your personal Meeting ID.*
      vi. Video – Recommended Defaults: Host to **On** and Participant to **On**
      vii. Recommended Meeting Options:
         1. Default Setting: "Mute Participants upon Entry" – this will keep everyone muted until they are unmuted by you.
         2. Default Setting: "Enable Waiting Room" – This will hold everyone in the meeting in a waiting room until you invite them in. This will be particularly helpful with dockets of people.
         3. (Optional) Click "Breakout Room pre-assign" – this will allow you to preassign parties/lawyers to specific breakout rooms for private consultation. A breakout room allows the parties/lawyers to move to the room for a conversation and to re-enter the room when they are done. This feature allows you to preassign those rooms. Please note that you can move them to breakout rooms spontaneously during the meeting, which will permit the same feature.

4. (Optional) Click "Record the meeting automatically" – this will produce a recording of the meeting that can be played later.
   a. **Recommended –** you will be given an option to record "On the local computer" or "In the cloud." We recommend in the cloud, as the recordings may fill up your hard drive quickly. By recording in the cloud, the space will be elsewhere and still accessible by you.
5. (Optional) Interpretation – Click "Enable language interpretation" if you expect a need for an interpreter during the hearing.
   a. The system will prompt you for an email address and language choices (from – to) for the interpreter. The system will send an invitation to the interpreter to join as an interpreter.
      i. Read more about and schedule OCA's Spanish interpreters who can join via Zoom at https://www.txcourts.gov/tcris/.
   b. Once in the hearing, you'll be able to assign an interpreter at the bottom of the page and choose the language for that interpreter. When you click "start," the system will switch the interpreter to that language channel. Individuals in the hearing can choose the language in which they want to hear the proceeding. The interpreter is allowed to switch between the languages for interpreting between languages.
d. Click the "Save" button at the bottom of the page.
e. On the Manage page that pops up next, you should consider additional information:
   i. (Optional) - You can add the hearing meeting to a Google Calendar, Outlook Calendar, or Yahoo Calendar by clicking the appropriate button.
   ii. (Mandatory) – You should click "Copy the invitation" from the right side of the screen to share with participants in the hearing.
      1. After clicking the "copy the invitation" link, it will bring up a pop-up screen that allows you to "Copy Meeting Invitation". After clicking that button, the text will be saved to your clipboard, and you will be able to paste the invitation into an email for sending to participants by pressing Ctrl+V or Command+V. You can click cancel afterward.
      2. You should paste the text into an email to the participants,
   iii. (Optional) - After you get the settings on your hearing meeting correct, you should consider saving the meeting template settings for future hearings by clicking "Save as a Meeting Template."
   iv. When you are ready to start the meeting, click "Start this Meeting." If the hearing is for a future date, you do not need to click this. Rather the meeting will show up in your [scheduled meetings](#).
2. When you start your first meeting, the system will install the Zoom application. It will then ask whether you want to "Join with Computer Audio" or by clicking at the top via "Phone Call." OCA recommends joining with computer audio, but you may choose a phone call by clicking "Phone

Call" at the top of the screen and calling one of the numbers listed and entering the meeting ID and participant number.

3. Once you join the meeting, other participants who join will be placed into a waiting room. If you click "Manage Participant" at the bottom of the screen, you can see the list of individuals wanting to enter the meeting. You can choose to admit certain persons or admit all. All individuals will enter the meeting with their audio muted, so you will need to unmute them by clicking Unmute on the individual or unmute all.
    a. Recommended: OCA recommends that you admit on those parties that are necessary for the hearing in progress.
    b. You may move participants back into the waiting room by clicking on More near their name and moving them to waiting room.

4. To initiate live streaming that provides the public with access to your hearings (to comply with the constitutional Open Courts provision), click on the "...More" at the bottom of the page and click "Live on Facebook" or "Live on Youtube." **Recommended: OCA recommends that you stream "Live on Youtube." See separate instructions for establishing a YouTube channel for your court.**
    a. LIVE ON YOUTUBE - After clicking "Live on Youtube", you may be asked to log in to the correct account with the court Youtube Channel. If you are already logged in to the appropriate Google account on the computer it is using, it will default to that Youtube channel.
        i. The popup will ask for the Zoom Meeting Title on Youtube, which you can modify as appropriate. Then you can choose the privacy of the video. For purposes of making the video available to the public, choose public.
        ii. Then click "Go Live." The system will begin the process of making the video and audio in the meeting live on the Youtube Channel. The video/audio is delayed about 20-30 seconds.
            1. One the proceeding is Live on Youtube, a notation will appear in the upper left of the Zoom meeting screen. A down arrow at that area will allow you to Stop the Livestream, View the Livestream, or Copy the Livestream Link.
            2. If you stop the livestream, you will need to repeat the steps to restart the livestream.

Zoom Host a Meeting Instructions to Start Hearing Now (Less Recommended)

1. To start a hearing now without scheduling (the scheduling function will allow you to start a hearing now even with scheduling and applies default settings):
    a. Click "Host a Meeting" at the top of the screen. A drop down menu will allow you to choose "With Video On" or "With Video Off." OCA recommends "With Video On."
2. When you start your first meeting, the system will install the Zoom application. It will then ask whether you want to "Join with Computer Audio" or by clicking at the top via "Phone Call." OCA recommends joining with computer audio, but you may choose a phone call by clicking "Phone

Call" at the top of the screen and calling one of the numbers listed and entering the meeting ID and participant number.

3. Invite participants by clicking "Invite" at the bottom of the screen. You should click the Email tab at the top of the pop-up that appears. You can choose to sent the invitation by an email application or click "Copy URL" or "Copy Invitation" at the bottom of the pop-up to paste into another email application.

4. Once participants receive the invitation, they will be able to automatically join the proceeding.

5. **To initiate live streaming that provides the public with access to your hearings (to comply with** the constitutional Open Courts provision), click on the "…More" at the bottom of the page and click "Live on Facebook" or "Live on Youtube." **Recommended: OCA recommends that you stream "Live on Youtube." See separate instructions for establishing a YouTube channel for your court.**

   a. LIVE ON YOUTUBE - After clicking "Live on Youtube", you may be asked to log in to the correct account with the court Youtube Channel. If you are already logged in to the appropriate Google account on the computer it is using, it will default to that Youtube channel.

      i. The popup will ask for the Zoom Meeting Title on Youtube, which you can modify as appropriate. Then you can choose the privacy of the video. For purposes of making the video available to the public, choose public.

      ii. Then click "Go Live." The system will begin the process of making the video and audio in the meeting live on the Youtube Channel. The video/audio is delayed about 20-30 seconds.

         1. One the proceeding is Live on Youtube, a notation will appear in the upper left of the Zoom meeting screen. A down arrow at that area will allow you to Stop the Livestream, View the Livestream, or Copy the Livestream Link.

         2. If you stop the livestream, you will need to repeat the steps to restart the livestream.

Utilizing the Breakout Rooms

There may be times where parties wish to confer outside of the "online courtroom." Examples might include attorney-client communications or probation-defendant communications after a plea. The Zoom breakout function is good for this purpose. You can find the Breakout Rooms button at the bottom of the screen or by clicking on the More button. The system will allow you to establish the number of breakout rooms. For more information on breakout room functionality, visit https://support.zoom.us/hc/en-us/articles/206476313-Managing-Breakout-Rooms.