Bingocize Setup Call Instructions

<u>Before making the call</u>

- On the call: Facilitator
    - Ask the moderator to block this time on their calendar to receive technical support calls if needed
- On standby: Moderator
    - If at any point the facilitator gets stuck with the technology, they can call the moderator to step in. (i.e. "I'm stumped on this one. I'm going to bring in our workshop moderator, Ean to join us. He's pretty handy with technology, so he should be able to help us finish setting this up for you. Hang on for just a moment while I call him.")
        - Using "Add call" from your cell phone, call your moderator. Then when they're on the line, merge the calls. This will put you into a conference call with all 3 of you
- Make sure you have this person's unique Bingocize ==username== and ==password== (get this info from the Registration excel sheet or from Allison if it's not in that sheet).
- Open a Bingocize session on your browser.
- If using the CW Zoom account: block off the time you plan to spend on this call on the calendar and inviting cwzoom@picf.org.
    - If you have your own Zoom account – use your own account instead of the CW account.
- Log into the Zoom account you plan to use for the workshop and start a meeting with your video on. You will use this later to make sure the person you're calling can connect to the meeting.
    - It's very important that you use the same account that the workshop will be held on since you'll want the ==Meeting ID== and ==Password== to be the same.

<u>Introductions</u>

- Introduce yourself as the workshop facilitator, reminding the person that you spoke last week to complete the pre-workshop survey together.
- Remind the participant of the workshop they signed up for (start date, time, schedule)
- Ask the participant if now is a good time to get everything set up for their workshop. This call should take about 15-30 minutes of their time. (if not – when is a better time to call back?)

<u>Accessing the workshop</u>
- Confirm the device that the person will be using to connect (i.e. laptop, tablet, etc)
    - Confirm that they have internet that connects to this device
    - Ask them if they still have the login information from last week's call – it was on the last page of the survey they completed. If not, ask them to get a piece of paper and pen to write down the information.
    - Explain that you are walking them through the process now so that they can log in on their own for each session.
- Connecting to Zoom
    - Desktop or laptop
        - Ask the person to open their browser (i.e. Safari, Firefox, Google Chrome, etc.)
        - Tell the person to go to the website zoom.us (you may need to spell it and tell them to click "go" or "enter")

- They should see a screen that says "zoom" in big blue letters on the left. If they look on that same line toward the right side of the screen they'll see "Join a Meeting" in blue letters. Ask them to click "Join a Meeting."
- They will now see a screen asking for a Meeting ID. Ask them to write down the Meeting ID if needed before typing it in. Give them the Meeting ID and have them click the blue button below that.
    - ==Meeting ID==
- They will need the password to join the meeting. Ask them to write down the password if needed before typing it in. Give them the password and have them click to join.
    - ==Password==
- If this is their first time using Zoom their browser may ask them to download the application or allow the platform to access their camera and microphone.
- At this point you should see them show up on your Zoom meeting. If they are prompted, ask them to click to show their video and use their computer audio.
- Once you can see and hear them on the screen, confirm that they can see and hear you. Hang up the phone call at this point and talk to them via Zoom.
- Now ask them to minimize the Zoom window. They should still see the host video (small) on the right side of their screen. Confirm that they can still see your video to the side of their screen.
- *Jump down to "Connect to Bingocize online" below*

  o Tablet or smartphone
  - If the participant is using a tablet or smartphone to connect to the workshop, direct them to use their phone. If using a smartphone to connect to the workshop, ask them if they know how to put their phone on speaker (this is important because they'll need to view their screen).
      - Ask them to write down if needed, since they'll be using them for every session
          o Zoom telephone number: 669-900-9128
          o ==Zoom meeting ID==
          o ==Zoom password==
      - Ask if the person has another phone they can use to call into the Zoom meeting (for example, if you are talking to them on their landline they may have a cell phone they can use).
      - If the person does not have another phone to use, hang up with them so they can test calling in, and tell them that if you don't hear from them in a minute or so that you'll call them back.
      - Make sure you're monitoring the Zoom meeting and can hear them call in.
      - Continue the conversation with them via Zoom.
  - Explain that some people may be joining via video, but everything will be explained verbally as well so if you can't see you won't be missing anything.
  - If using a smartphone, ask them to put their phone on speaker and go back to the home page (they can click the button in the bottom middle of their phone).

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Connect to Bingocize online

- Ask them to open a browser on whatever device they intend to use for the regular workshop (i.e. Safari, Google Chrome, Internet Explorer, Mozilla Firefox, etc.)
- Type in the URL: play.bingocize.com (spell it out and tell them to press "go" or "enter" if needed)
- Tell the person their <mark>username</mark> and <mark>password</mark> to log in
    - Ask them to write it down if needed so they have it for next time
    - Make sure they are aware of any capitalization their device may automatically apply (i.e. some tablets capitalize the first letter automatically)
    - Make sure their login information works
    - If there is an issue with their login information (including misspelled names or multiple failed login attempts), get the correct information from them (correctly spelled first and last name) and let Allison know so that the login information can be fixed.
- Ask the person what they see on their screen (they should see the Bingocize logo at the top left and a "Logout" button on the top right)
- They should see a bar underneath that has a "Play" button on the right. Click the Play button, then ask if they see a Bingo card.
- Tell them that we will use this exact process to log in to play for the real workshop.
- Remind the participant of the workshop time and start date, and that they will be logging in on their own.
- Remind the participant what steps they will need to take to join the session:
- Join the Zoom meeting online OR call in by phone (whatever you just did with them)
- Log into play.bingocize.com with their username and password
- Make sure they wrote down all the URLs and passwords needed, and explain that the information is going to be exactly the same for every session:
    - Zoom website (if using video): zoom.us
    - Zoom telephone number: 669-900-9128
    - <mark>Zoom meeting ID</mark>
    - <mark>Zoom password</mark>
    - Bingocize website: play.bingocize.com
    - <mark>Bingocize Username</mark>
    - <mark>Bingocize Password</mark>
- Ask the participant if they have any questions
- Ask the participant to join 10 minutes before the start of the workshop so that we can make sure everyone is able to join the call before we begin.
- Tell them you're looking forward to speaking to them again during the first session.