Guidance for CJA Panel Attorneys using Video Conference Technology for Client Meetings

5/12/2020

1. **Introduction**

    Due to COVID-19, CJA panel attorneys are frequently unable to meet with their clients in person. Telephone calls are a good way to communicate, but there are times when you will want to see and hear your client or to share or review documents together. Video conference technology is a great way to communicate with your clients in those instances.

    This memo provides guidance and recommendations for conducting client meetings using two common video conference technologies, WebEx and Zoom. Section two (2) covers WebEx and Section three (3) covers Zoom. To make it easier to read, each section is written as a stand-alone piece. There will be some repetitive language as both tools work in similar ways.

2. **WebEx**
    2.1. **Getting started with WebEx**
        2.1.1. **Sign up for WebEx and install the application**

    If you are considering using WebEx, sign up for a free account. Though you do not need your own account to attend a meeting someone else has scheduled, you will need it to schedule your own meetings. For meetings with clients you will want to schedule the meeting as it gives you control over security and privacy settings.

    [NOTE: With jail facilities, they will likely schedule the meeting and you will not have that option.]

    WebEx meetings can be viewed through a browser, but with limited functionality. Install and use the application instead.

    WebEx works with either Windows or Mac machines.
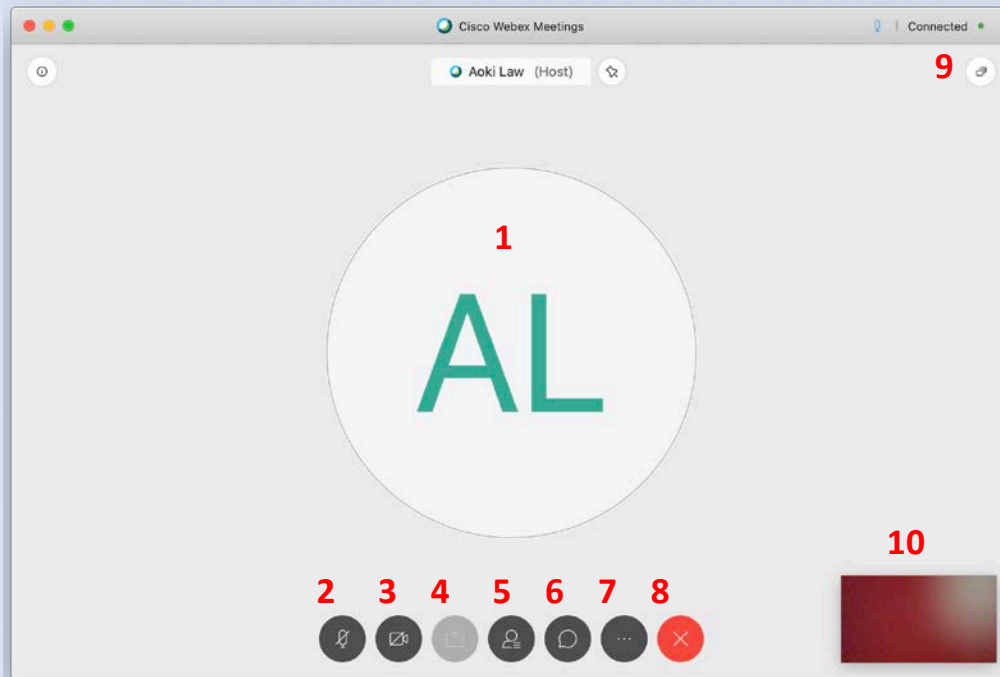
    > Links to free account sign-up:
    > https://cart.webex.com/sign-up-webex
    > Download the application:
    > https://www.webex.com/downloads.html/

    After you download the installer, open it and install the program like you would any other application on your computer.

2.2.   WebEx Meeting controls

WebEx meeting controls

1. Picture of current speaker (initials if no video)
2. Mute/unmute
3. Turn video on/off
4. Share computer screen
5. View list of participants
6. Send message to other participants
7. Other options
8. Exit meeting
9. View list of meeting participants
10. Your picture (if sharing video)

2.3.   Scheduling a WebEx meeting

WebEx gives you two options for scheduling a meeting: starting an impromptu meeting in your account's "room" or scheduling individual meetings separately. The URL linking to your WebEx room remains the same whenever you use it. Individually scheduled meetings will have separate URLs to join each time.

Although the static room URL may be convenient, for security, schedule a new meeting for each client conference.

On WebEx's screen for scheduling a meeting, you can set the start time and duration of your meeting, give it a title, and enter the email addresses of the people you want to invite.

The "Start a Meeting" button will take you to a meeting in your account's room. Use the **Schedule** button instead.
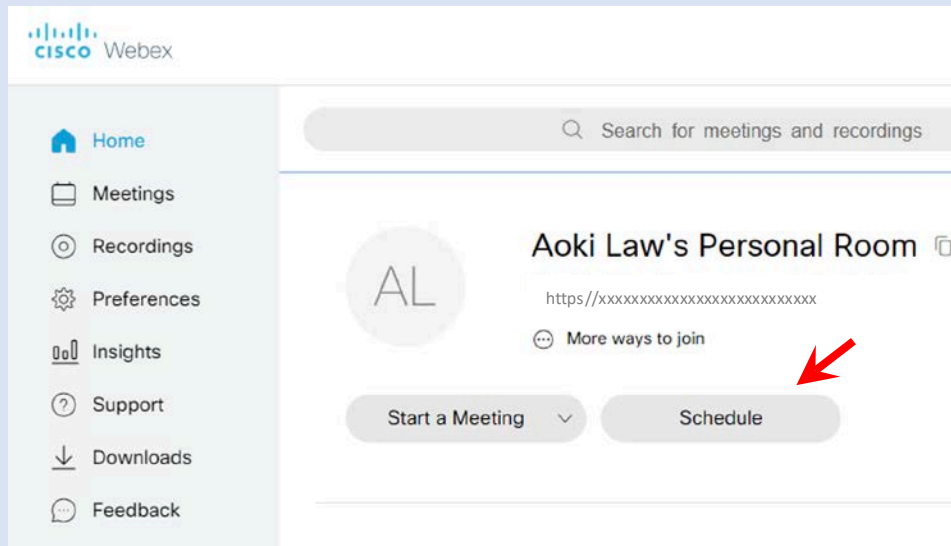

Enter your client's email address (or the addresses of others you want to invite) in the **Attendees** space, then click **Schedule**.
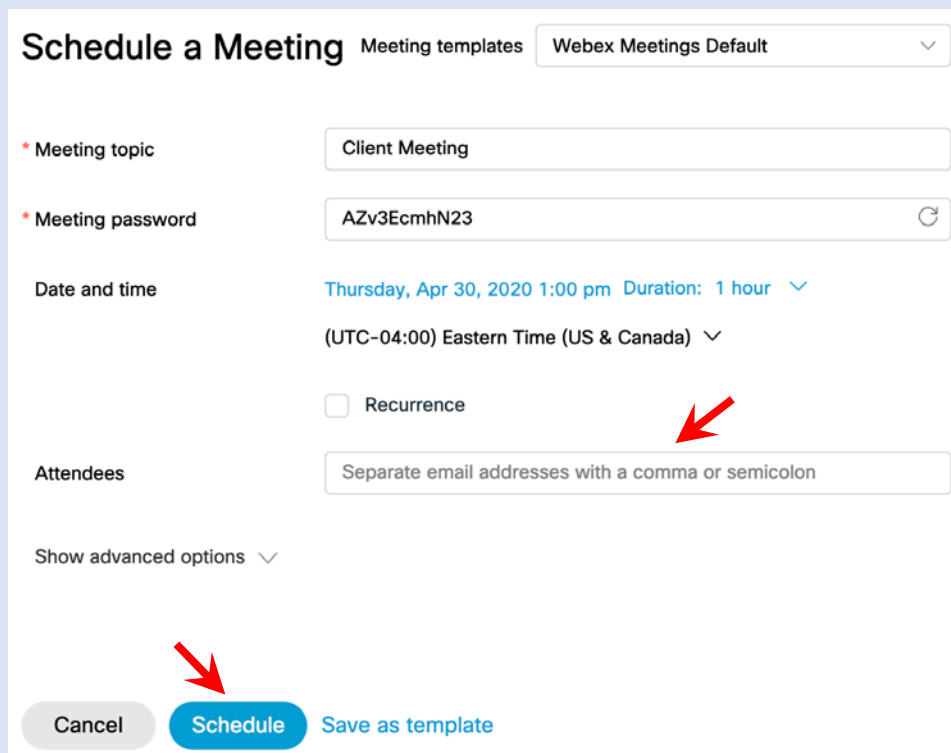
2.4.   Starting a WebEx meeting

When the meeting's scheduled time arrives, log into WebEx and start the meeting. WebEx's default security setting is to allow only participants to join a meeting after the host, so start the meeting 10–15 minutes early.

> The Home tab of your WebEx account shows the meetings you have scheduled. Click the **Start** button of the meeting you want to start.
>
>
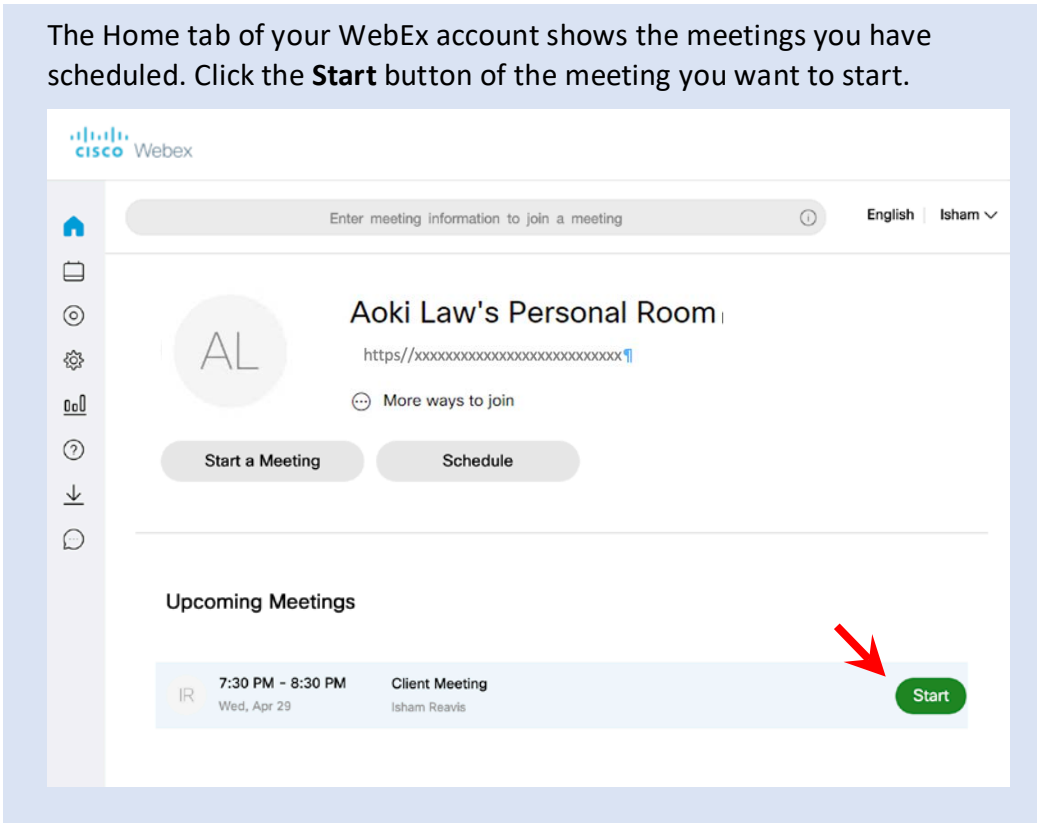
When you start a meeting, you may get an alert window asking you to allow your browser to launch Cisco WebEx Start. Click "allow." The meeting will start in a few moments.

2.5.   Joining a WebEx meeting

If you start a meeting from your computer, you will join automatically. But you may find yourself needing to join a meeting scheduled and started by a colleague or need to walk a client through the process.

2.5.1.   Joining by clicking an email link

You may receive an email invitation from the host of a WebEx or Zoom meeting. From the email, once the meeting has started you can join

directly by clicking a link in the email.

Example email invitation, with **link** to join:

2.5.2. Joining through the desktop application

You can also join a meeting by opening the WebEx application and entering the meeting number and password (if a password has been set).

Joining a meeting from your desktop application. Enter the **meeting number** (WebEx) to join:
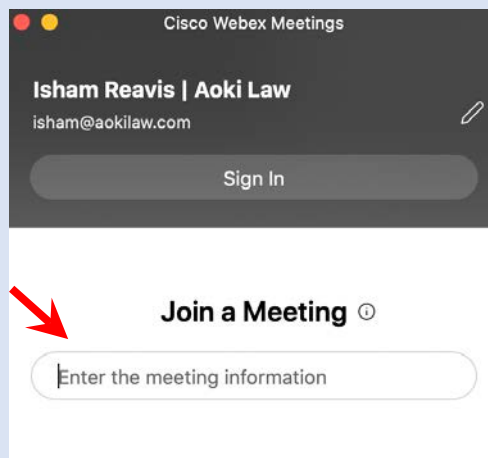
2.5.3. Join a meeting by phone

WebEx allows you to call into a meeting by phone. You can do this to participate by voice only, or you can join by computer and call in separately with your phone for audio. Dial the phone number in the meeting invitation. When prompted, enter the nine-digit meeting number then press the # key.

Use either the telephone or your computer for audio, not both. Otherwise you and others in the meeting will hear an echo or get feedback noise.

2.6. Security and privacy

WebEx offers several security and privacy options. Most of the recommended options are enabled by default. You can set security options by clicking the *Advanced options* tab when scheduling a meeting.

Enter your client's email address (or the addresses of others you want to invite) in the **Attendees** space, then click **Schedule**.

Show advanced options ∨

Cancel   Schedule   Save as template
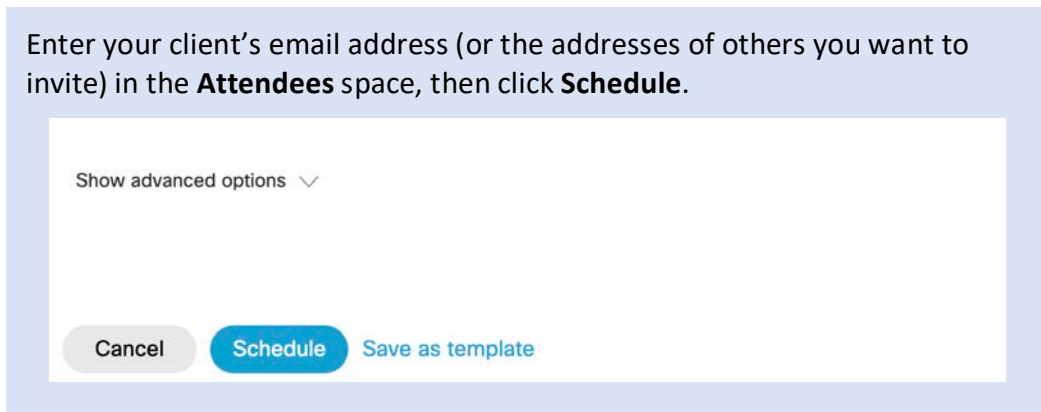
The following security settings are recommended:

- Set **entry and exit tone** to **Beep**, so you can tell when someone has joined the meeting. If the entry tone is set to Announce Name, an attendee who neglected to state their name might join the meeting without you noticing.
- Check the box to **Exclude password from email invitation**. This means you will have to send a separate email to your invitees to provide them the password. But including the password with the invitation (which will also have the link to join the meeting) means that anyone who is forwarded the invitation email can join.
- **Disable** the ability of invitees to **Join before host**. Combined with the entry tone, this will allow you to keep track of all attendees.

Additionally, WebEx has a feature that allows you to record your meetings. Whether or not you make use of this feature, be aware that if you select the option to record to the cloud, a copy of your meeting will be stored remotely on WebEx's servers.

**3.	Zoom**
**3.1.	Getting started with Zoom**
**3.1.1.	Sign up for Zoom and install the application**

Like WebEx, if you are considering using Zoom, sign up for a free account. Though you do not need your own account to attend a meeting someone else has scheduled, you will need it to schedule your own meetings. For meetings with clients you will want to schedule the meeting as it gives you control over security and privacy settings.

[NOTE: With jail facilities, they will likely schedule the meeting and you will not have that option.]

Zoom offers free account sign-up, though the free account only allows you to schedule meetings up to 40 minutes long.

Also, like WebEx, Zoom meetings can be viewed through a browser, but with limited functionality. Install and use the application instead.
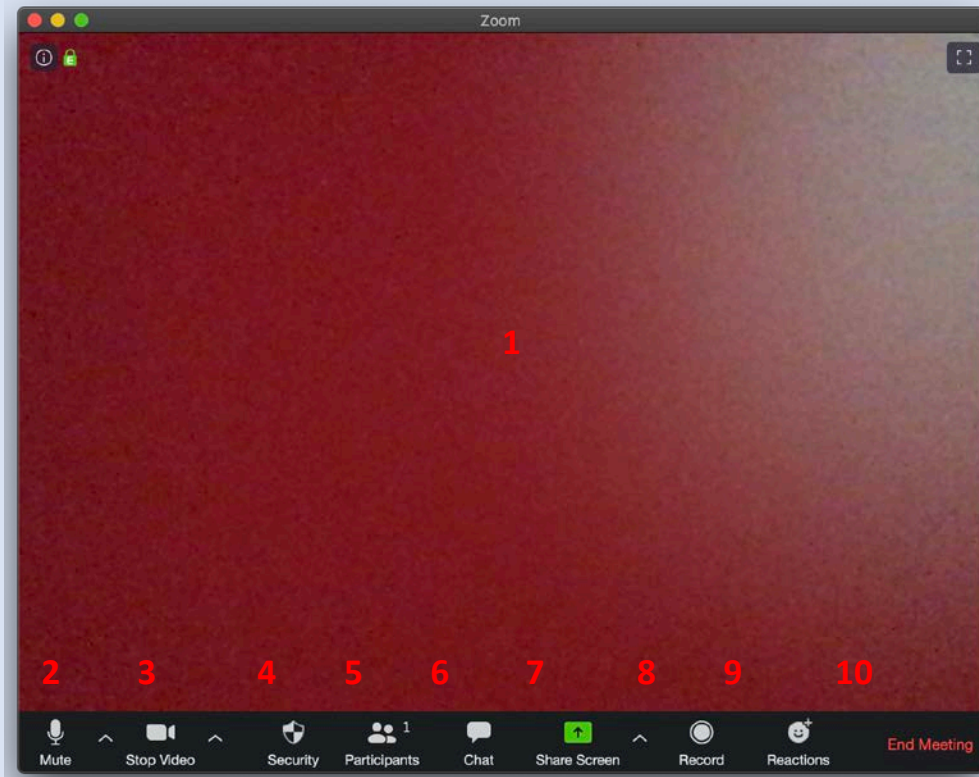
Zoom works with either Windows or Mac machines.

Links to free account sign-up:https://zoom.us/freesignup

Download the application: https://zoom.us/support/download

After you download the installer, open it and install the program like you would any other application on your computer.

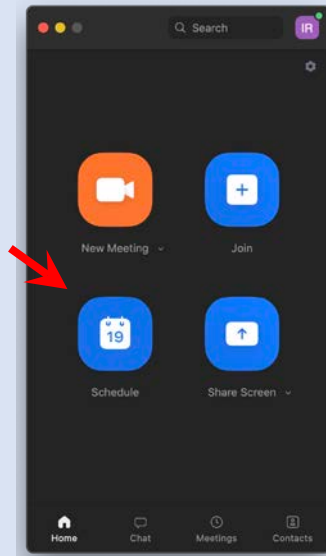### 3.2. Zoom meeting controls

Zoom meeting controls

1. Picture of current speaker
2. Mute/unmute
3. Turn video on/off
4. Security options
5. View list of participants
6. Send message/files to other participants
7. Share computer screen
8. Record meeting
9. Post reactions (clap; thumbs up)
10. Exit meeting

3.3. Scheduling a Zoom meeting

Zoom has recently increased the privacy and security features on its platform to address concerns about unwanted participants intruding into meetings. As with WebEx, Zoom offers a standing meeting with a fixed link (Zoom calls this a Personal Meeting ID instead of a room), which you should avoid for security purposes. Instead, schedule each client meeting individually.

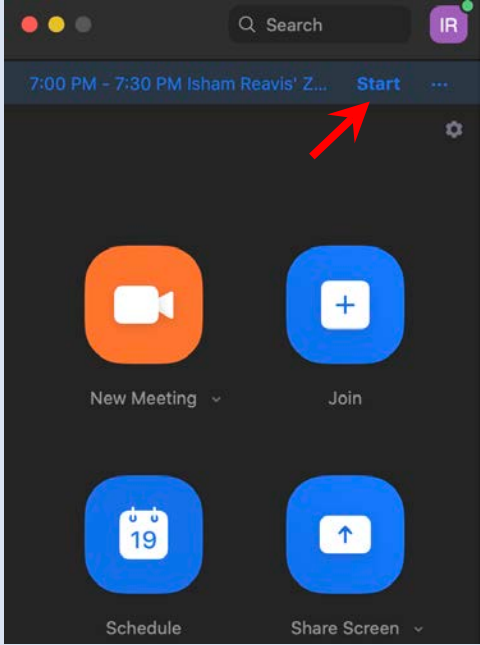Schedule a meeting in the Zoom application using the **Schedule** option:

Generate a new **Meeting ID** and require a **password**, then click **schedule:**

3.4.   Starting a Zoom meeting

When the meeting's scheduled time arrives, log into Zoom and start the meeting.

Your upcoming meetings are displayed at the top of the Zoom application's home tab. Click the **Start** button of the meeting you want to start.
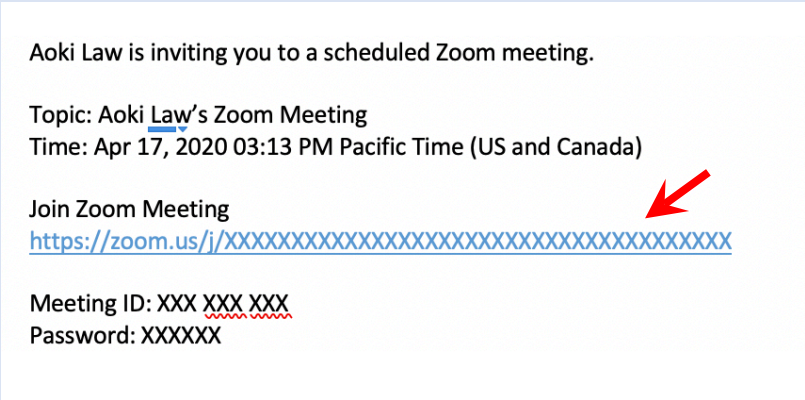

3.5.   Joining a Zoom meeting

You will automatically join a meeting you start. But you may find yourself needing to join a meeting scheduled and started by a colleague or need to walk a client through the process.

3.5.1. Joining by clicking an email link

Zoom meetings may be joined by clicking a link and entering a password.

Example Zoom email invitations, with a **link** to join:

Aoki Law is inviting you to a scheduled Zoom meeting.

Topic: Aoki Law's Zoom Meeting
Time: Apr 17, 2020 03:13 PM Pacific Time (US and Canada)

Join Zoom Meeting
https://zoom.us/j/XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Meeting ID: XXX XXX XXX
Password: XXXXXX

3.5.2. Joining through the desktop application

You can also join a meeting by opening the Zoom application and entering the meeting number and password (if the host has set a password).

Joining a meeting from your desktop application. Enter the **meeting ID** to join:
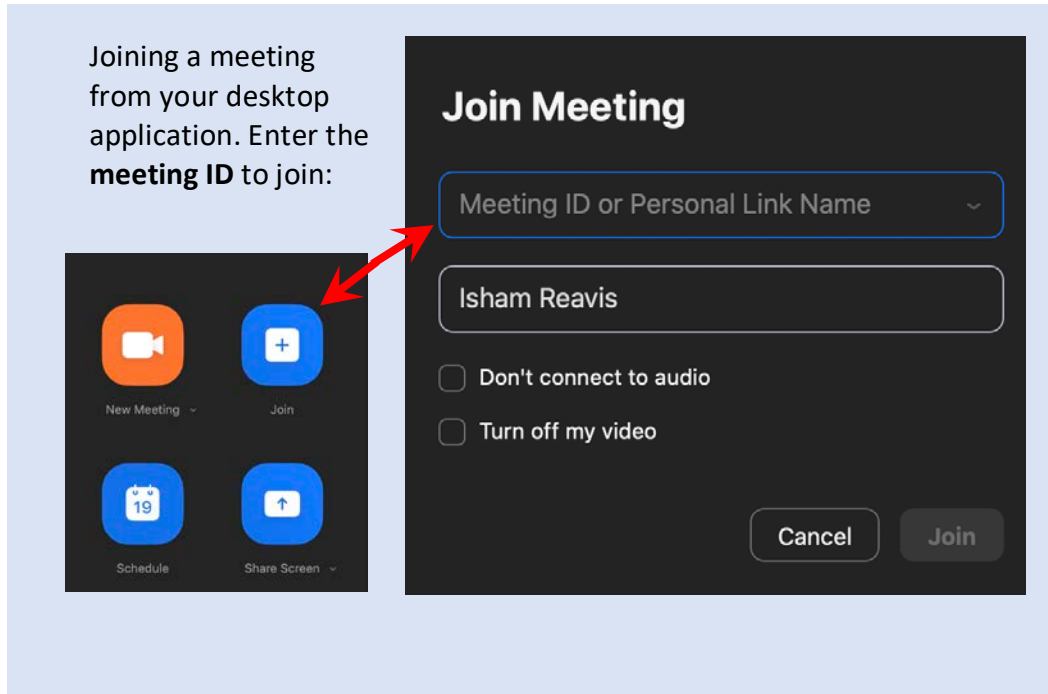

3.5.3. Join a meeting by phone

Zoom allows you to call into a meeting by phone. You can do this to participate by voice only, or you can join by computer and call in separately with your phone for audio. Dial the phone number in the meeting invitation. When prompted, enter the nine-digit meeting number then press the # key.

Use either the telephone or your computer for audio, not both. Otherwise you and others in the meeting will hear an echo or get feedback noise.

3.6.   Security and privacy

Zoom has recently made changes to its application in response to security concerns about unauthorized participants joining meetings. Now, many security settings are enabled by default, including requiring a password. Zoom's *Settings* menu gives you access to

Zoom's **Settings** menu is accessed through the gear icon on the home screen:

other security settings. You can use these to set your default meeting settings, and to enable/disable other features.
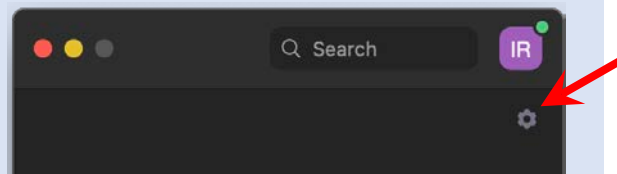
The following security options are recommended from the *Settings* menu:

- **Disable** the option for **Join before host**.
- **Enable** the setting to **Require a password when starting a new meeting**.
- **Enable** the setting to **Require encryption for 3rd party endpoints**.
- **Disable Auto-save chats**.
- Enable **Play sound when participants join or leave**. As with WebEx, in conjunction with disabling Join before host, this allows you to keep track of the participants in your meeting.

And as with WebEx, Zoom has a feature that allows you to record your meetings. Whether or not you make use of this feature, be aware that if you select the option to record to the cloud, a copy of your meeting will be stored remotely on Zoom's servers. Other Zoom features such as captions and transcription may also store data regarding your client meeting on Zoom's server.

Further training and instruction:

- WebEx:
  https://help.webex.com/en-us/
- Zoom:
  https://support.zoom.us/hc/en-us

This document was prepared by Aoki Law PLLC and the National Litigation Support Team (DSO-TD). Technology is frequently updated, so go to each company's website for the most current information about their products.