

Formalizing Agreements in a Zoom Mediation

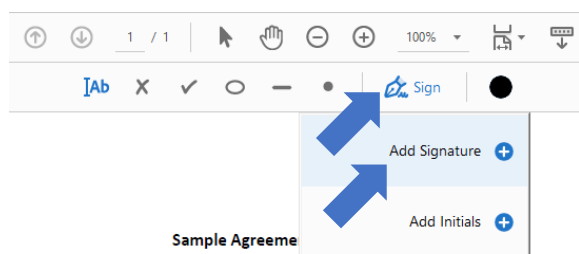
In a face-to-face mediation, agreements to mediate are the first order of business, and often that preliminary agreement is formalized by signing a paper form. Similarly, many face-to-face mediations that produce an agreement conclude with the signing of a written contract. But in online mediation, how can these agreements be formalized? There are a couple options.

Option 1: Formalize Agreement Via Email

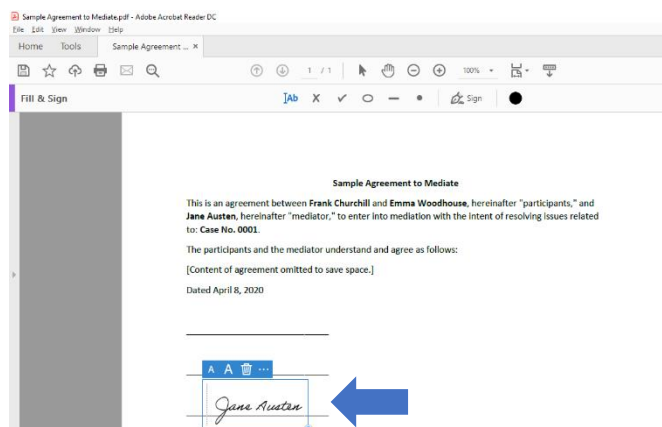
If you choose to formalize agreements via email, ensure all participants are familiar with the technology to be used. Many participants are likely familiar with software that attaches digital signatures to PDFs, such as Adobe Acrobat, PDF Buddy, and others. Digital signatures take a variety of forms. It may be an image that mimics a handwritten signature, or it may be a digital signature certificate encoding the signature's attachment to the file. Alternatively, participants may prefer to print the agreement, sign a hard copy, and return the signed copy. All these options can be effective, provided the participants (and the mediator) know how to use the technology involved. This info sheet demonstrates how to sign and share an agreement to mediate using Adobe Acrobat Reader's signature function.

1. After preparing the text of the Agreement to Mediate. Save it as a PDF and open the PDF in Adobe Acrobat Reader.

2. Select Acrobat Reader's "Sign document" function on the right side of the upper toolbar. This opens the "Fill & Sign" toolbar.



Sample Agreement to Mediate
This is an agreement between Frank Churchill and Emma Woodhouse, hereinafter "participants," and Jane Austen, hereinafter "mediator," to enter into mediation with the intent of resolving issues related to Case No. 0001.



3. On the "Fill & Sign" toolbar, click "Sign," then click, "Add Signature." This opens a window that enables you to create a signature by typing, drawing, or uploading an image. A typed signature is used for this demonstration.

4. Type your name next to the red arrow and click "Apply."

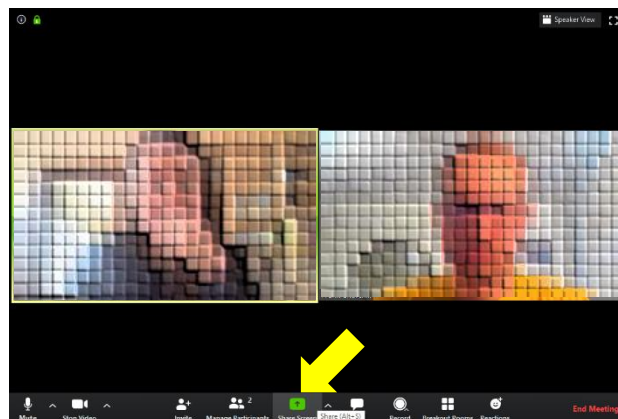
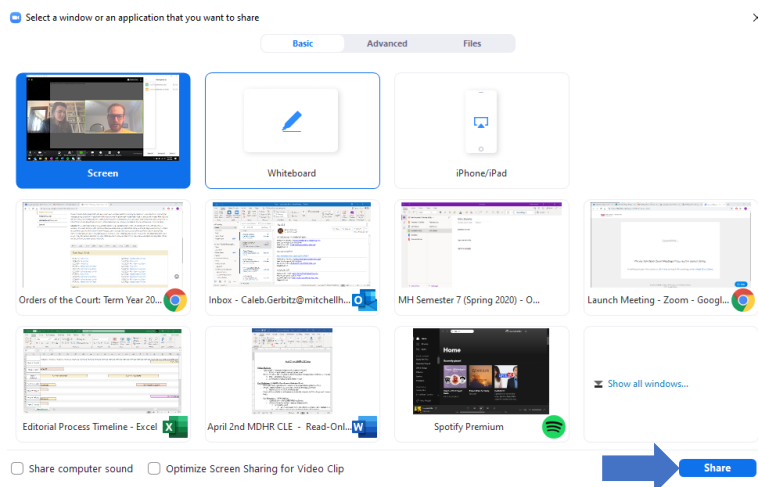


5. The window will close, returning you to the document to be signed. Your typed signature will attach wherever you click next, so navigate your cursor to the location you want to sign and click once. Your signature is attached.

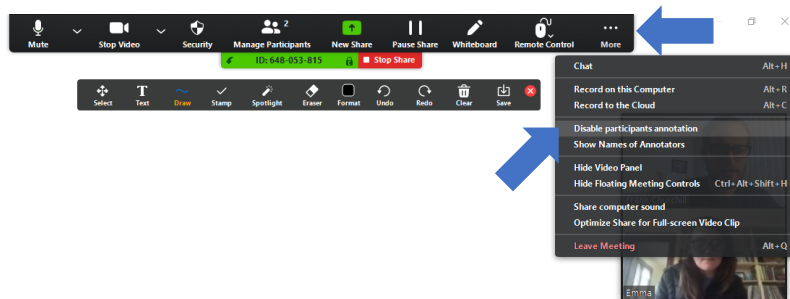
6. To save the signed document, click "Next." This will give you the option to save the signed document as a new file. The new file can then be emailed to the next participant to sign. Once all participants sign the agreement, distribute copies to the appropriate individuals.

Option 2: Formalize Agreement Within Zoom

1. Zoom's "Share Screen" function enables participants to view and annotate an agreement on a shared screen. To share a screen with all participants, click the "Share Screen" function on the lower toolbar.



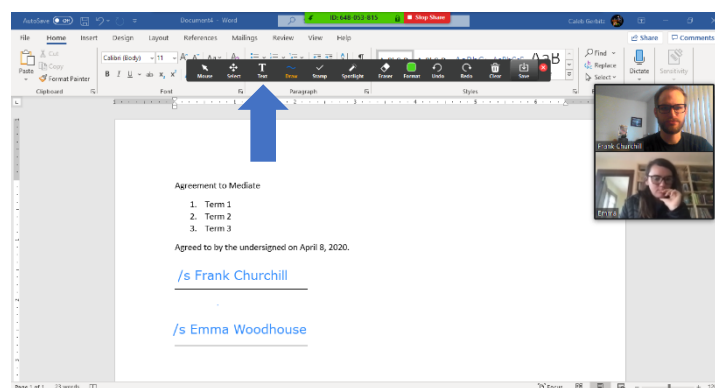
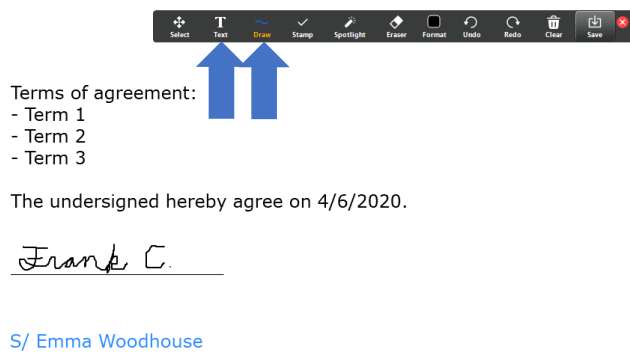
2. This launches a window asking what screen you would like to share. You have several options. One option is to use Zoom's "Whiteboard" feature, which provides a blank space where all participants can contribute, either by drawing or typing. Another option is to share a Word document or PDF that contains the agreement. Click the desired option, then click "Share."



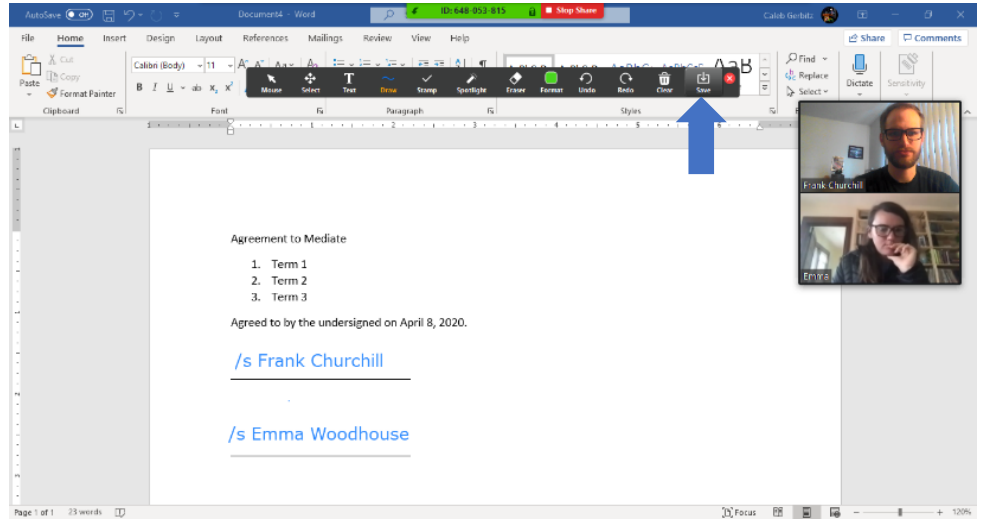
3. After Zoom begins sharing your selected screen, select the "More" function on the upper toolbar. (If the upper toolbar is not visible, hover your mouse over the top center of the screen, and the toolbar will appear.) On the dropdown menu, ensure participant annotations are enabled. Participants will use the annotation functions, to sign the agreement.

4. Display the terms of the agreement. If you are using the whiteboard function, select the "Text" function on the floating toolbar, click where you would like to begin typing, and type the desired terms. If you are sharing a document, use that program's typing functions. Indicate where participants should sign the agreement.

5. Direct participants to sign the agreement either by using the "Text" function or the "Draw function." Displayed below are agreements displayed in the whiteboard feature (left) and a shared Word document (right).

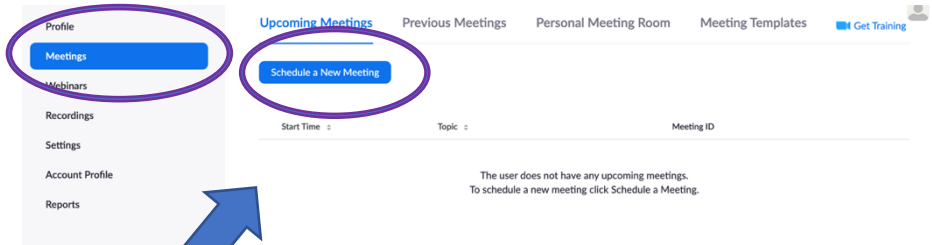


6. Save the signed agreement by selecting “Save” on the floating toolbar. By default, Zoom creates a folder titled “Zoom” in your “Documents” folder. Saved copies of signed agreement will be saved to that folder. Ensure that participants who should receive copies of the agreement do so.



How to Set-Up a Zoom Mediation Meeting:

1. When logged into Zoom, you will see a screen like this. Click on the “Meetings” button on the left side of your screen.



2. Then click “Schedule a New Meeting.”
3. Give your meeting a Topic.
Set the Time, Duration & Time Zone.

Notes:

- (A) As the host, you can open the meeting before your scheduled time. Only after you are logged-in can participants join.
- (B) If you are using the same Zoom account across your organization, you can only have one meeting running at a time.

This scheduling function is an internal function—it’s not going to prevent someone from starting a new meeting, even if another one is running; it will instead just end the meeting that is in progress. So, the entire organization should be aware of this usurping function and be cognizant of when they log-in.

Also, whoever is scheduling the mediation should include an adequate buffer time between uses.

My Meetings > Schedule a Meeting

Schedule a Meeting

Topic

Description (Optional)

When

Duration hr min

Time Zone

☐ Recurring meeting

4. Consider the Different Meeting Options.
We suggest:

- a. Keep Meeting ID as “Generate Automatically.”
- b. Click “Require Meeting Password.”
- c. Click Video “On” for both Host and Participant.
- d. Click “Both” for audio access.

Registration ☐ Required

Meeting ID ☒ Generate Automatically ☐ Personal Meeting ID 664-854-4499

Meeting Password ☒ Require meeting password

Video

Host	<input checked="" type="radio"/> on <input type="radio"/> off
Participant	<input checked="" type="radio"/> on <input type="radio"/> off

Audio ☐ Telephone ☐ Computer Audio ☒ Both


Dial from United States of America [Edit](#)

5. Recommendations:

- a. Enable waiting room.
 - i. This allows participants to wait separately, rather than awkwardly waiting with you for everyone to log-in.
 - ii. Process is streamlined.

Meeting Options

☐ Enable join before host

☐ Mute participants upon entry 

☒ Enable waiting room

☐ Only authenticated users can join

☐ Record the meeting automatically

6. Considerations:

- a. Mute participants upon entry.
 - i. Best if you expect a bigger group, or if you expect a lot of background noise.

Alternative Hosts

7. Do not recommend:

- a. Enable join before host.
 - i. This allows participants to join beforehand. It is best if you arrive first.
- b. Record the meeting automatically.
- c. Only authenticated users can join.
 - i. Participants have to enter in extra information to join; this step adds more work and is not necessary.

8. If you are co-mediating, consider adding your co-mediator to be an alternative host.

9. Click Save.



10. To invite participants, there are three main options:

(A) Click “Copy Invitation.” [Recommended]

i. Pros:

1. Technological back-up is ready. (Meeting ID available to dial in via phone.)
2. Once you copy the invitation and paste it into an e-mail, you can edit it to make it more personal and/or add more specific information.

ii. Cons:

1. Takes a couple of extra steps. See Step 11.

(B) Simply copy the URL link and send it out.

i. Pros:

1. Simple and easy.
2. If you know the person has used Zoom before and you know they will be joining via computer, then you can just send the URL link.

ii. Con:

1. If there are technological difficulties, there is no safety net.

Q: Why is the Meeting ID important?

A: It's helpful to include in case someone prefers to call-in, or if their technology isn't working. A person dialing by phone would simply call the listed number and join the Zoom call by entering the Meeting ID number.

(C) Set-up through your Outlook or Yahoo calendar.

i. Pros:




1. Outlook adjusts to the time zones for people accordingly.

ii. Cons:

1. Not everyone uses Outlook or Yahoo calendars.

My Meetings > Manage "Mediation"

Start this Meeting

Topic	Mediation
Description	How to set-up a Zoom Mediation
Time	Apr 3, 2020 09:00 AM Central Time (US and Canada) Add to   C
Meeting ID	599-816-758
Meeting Password	× Requires meeting password B
Invite Attendees	Join URL: https://mitchellhamline.zoom.us/j/599816758  A

11. The “Copy Meeting Invitation” includes more information than needed. Here are some recommendations:
- After you’ve pasted the invitation into an e-mail, click “enter” after the URL link so that it becomes a hyperlink.
 - Delete Meeting ID number below the “Join Zoom Meeting.” Instead, keep the Meeting ID number listed below the phone numbers. (No need to list the Meeting ID number twice.)
 - Delete One Tap Mobile numbers. (They’re unnecessary.)
 - Leave all other phone numbers.

Copy Meeting Invitation

Meeting Invitation

Topic: Mediation

Time: Apr 3, 2020 09:00 AM Central Time (US and Canada)

Join Zoom Meeting

<https://mitchellhamline.zoom.us/j/599816758>

Press “enter” after link

Meeting ID: 599 816 758

One tap mobile

+13126266799,,599816758# US (Chicago)

+16465588656,,599816758# US (New York)

Delete

Dial by your location

+1 312 626 6799 US (Chicago)

+1 646 558 8656 US (New York)

+1 346 248 7799 US (Houston)

+1 669 900 6833 US (San Jose)

+1 253 215 8782 US

+1 301 715 8592 US

Meeting ID: 599 816 758

Keep this Meeting ID #

Copy Meeting Invitation

Cancel

Zoom Mediation Security Recommendations

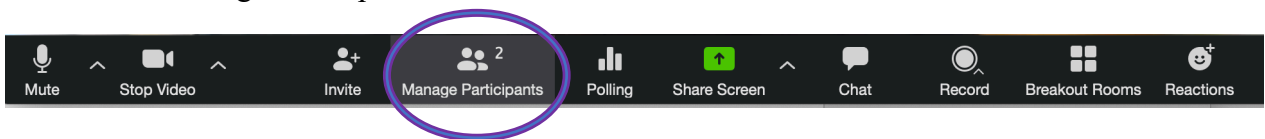
- (A) Use a password to join meeting. (See Step 4.)
- (B) Lock meeting after all participants have joined.

Q: Why Lock the Meeting?

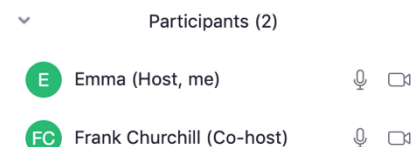
A: There has been news that people have been joining Zoom meetings without permission (sometimes sharing illicit material). Locking the meeting ensures that no one else who has the link can join your meeting.

How to Lock a Meeting:

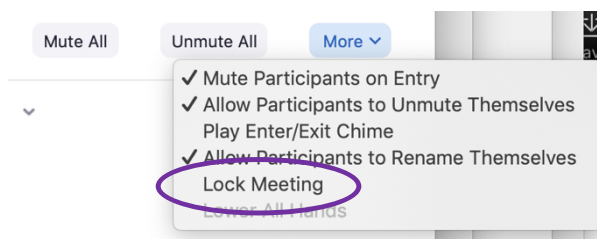
1. Go to Manage Participants and click on the icon.



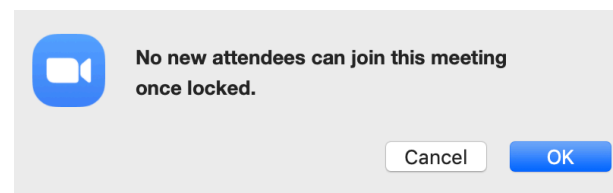
2. On the right side of your screen, you will see all participant names pop-up. In the middle of that window you will see a “More” button. Click on that.



3. The drop-down window will then give you an option to “Lock Meeting.” Click on that.

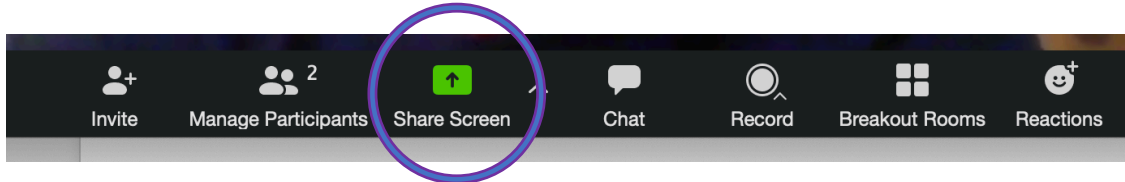


4. Click “Okay.” The meeting is then locked. To unlock, simply go back to the “More” drop down window and click “Unlock Meeting.”



How to Share Your Screen in Zoom

1. Once you're logged in, you'll see a tool bar at the bottom of your Zoom screen. If one isn't there, hover your mouse over the bottom of your Zoom screen. You should see something like this:



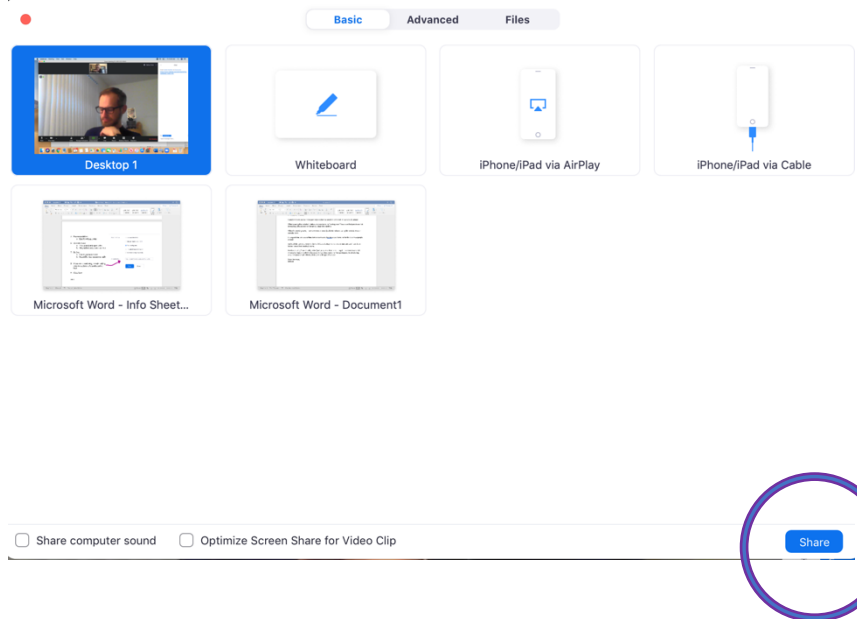
2. Be sure to have the documents that you want to share already open. Click on "Share Screen."

3. You'll see that there are options to share documents you already have open.

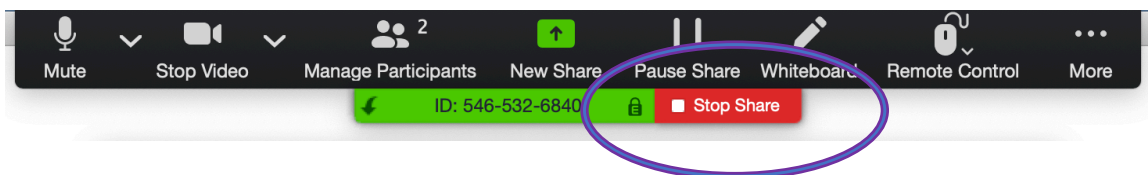
Or, you can use Zoom's Whiteboard function.

Select whichever option you prefer, and then click the "Share" button located on the bottom right hand corner of your screen.

The content on your screen will then be shared with the other participants in the Zoom call.

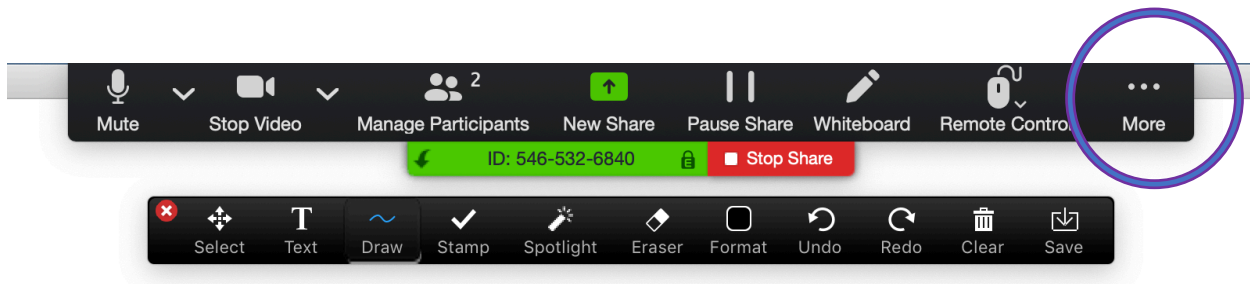


4. To stop sharing content, simply click "Stop Share." If the toolbar isn't there, hover your mouse over the bottom or top of your Zoom screen.

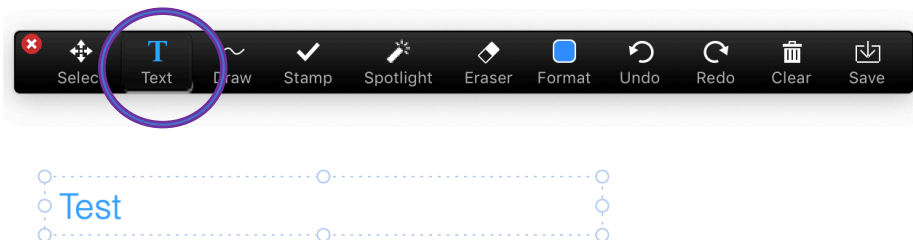


How to Share Your Screen & Use the Whiteboard

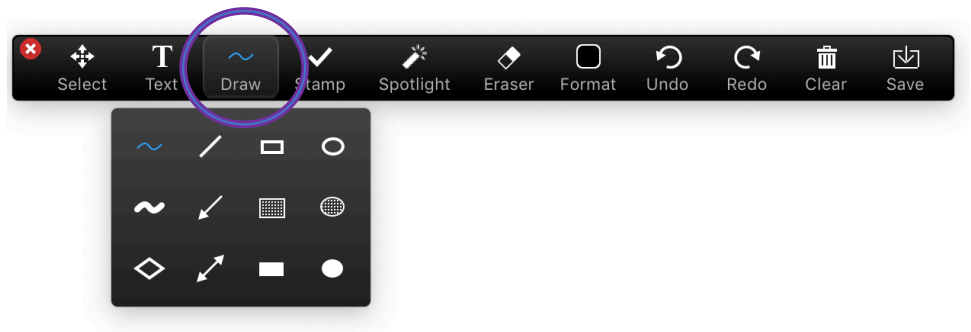
5. After you clicked “Share Screen,” choose the Whiteboard function [steps 1- 3 above].
6. You’ll see a shared whiteboard appear on your screen. You and the other participants will be able to both see and annotate it.
7. This taskbar will show up at the top of your screen. Click the “More” icon with three dots, and an option to annotate will appear.



8. To type with text on the Whiteboard, select the “Text” icon.

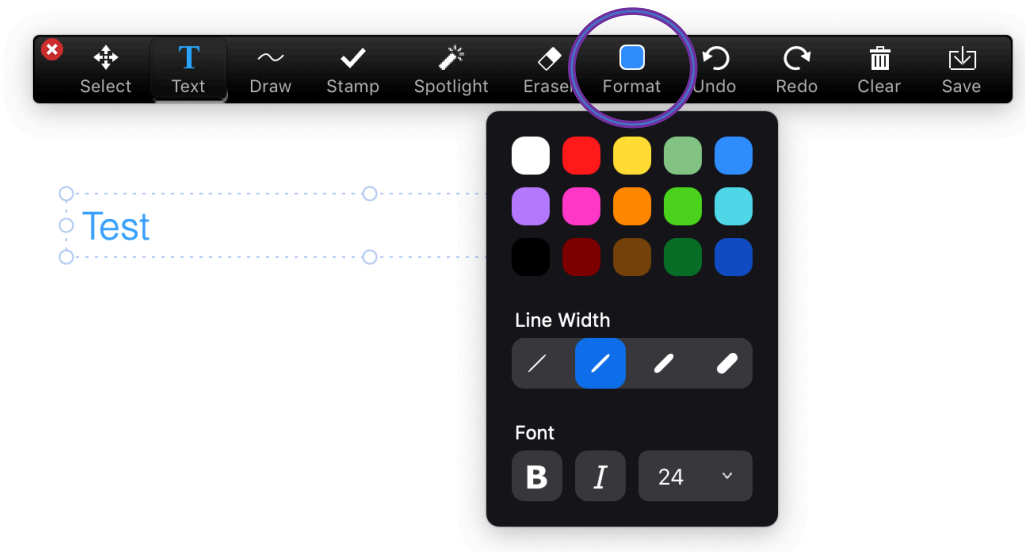


9. To draw with your cursor on the Whiteboard, select the “Draw” icon.



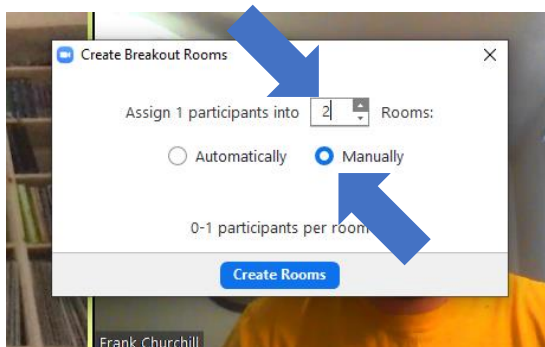
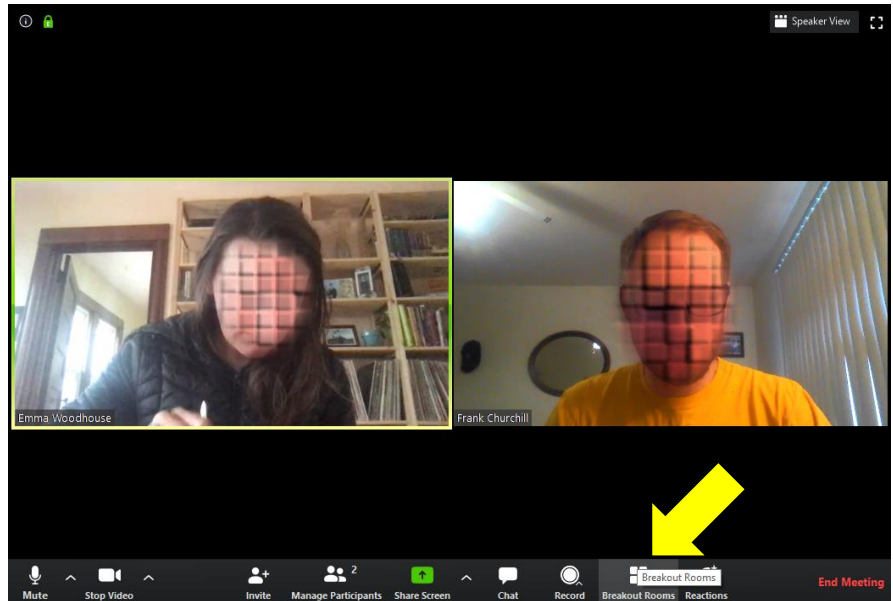
Test

10. To select the color, font size, and other tools select the “Format” icon.

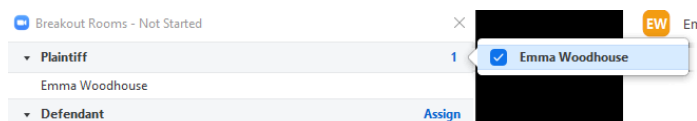
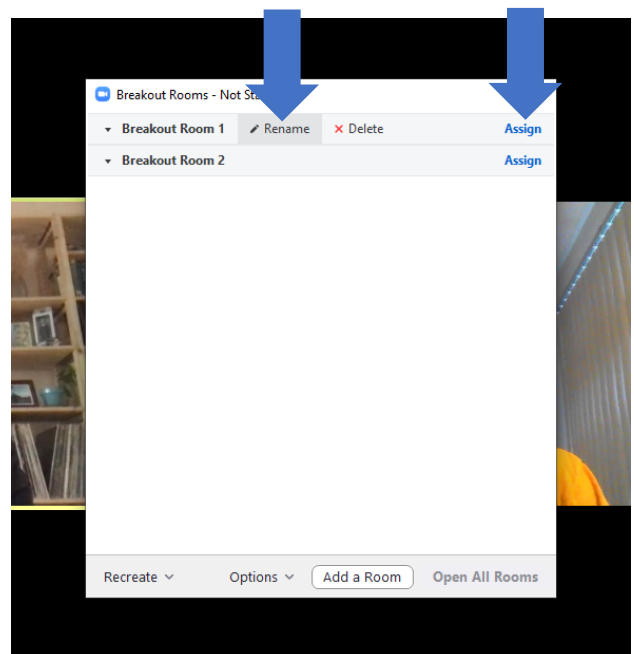


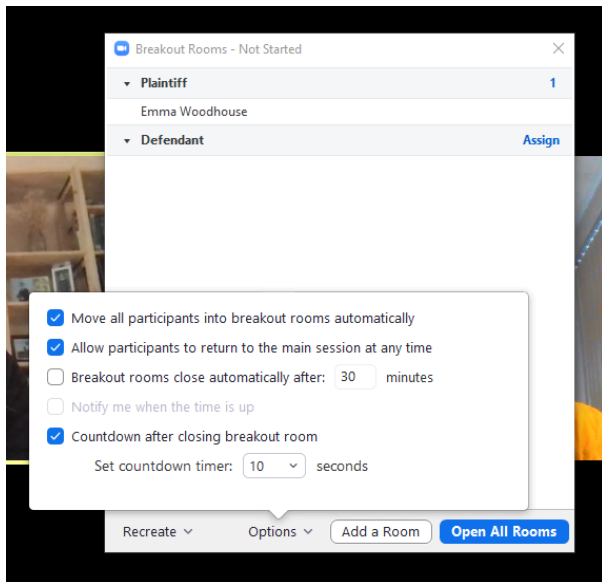
Using Breakout Sessions for Caucuses and Breaks

1. If you are setting up the meeting, ensure Zoom's breakout session feature is enabled (see corresponding info sheet for setting up a meeting).
2. When you want to begin a breakout session, navigate to the "Breakout Session" tool on Zoom's lower toolbar and click that option. A window titled "Create Breakout Rooms" will appear.



3. The pop-up window presents two options. Adjust the number of breakout rooms to number of rooms desired, likely equal to the number of parties in interest.
4. Select the option to create breakout sessions "Manually." This enables you to choose which breakout room each participant is assigned to.
5. Click "Create Rooms" to open the "Breakout Rooms" pop-up window.
6. The "Breakout Rooms" window includes several important features.
 - a. By default, breakout rooms are titled "Breakout Room 1" and "Breakout Room 2." You can rename them to a more useful indicator, such as the name of participants assigned to that room.
 - b. Use the "Assign" function in this window to assign participants to the proper breakout room. Click "Assign," then check the names of participants assigned to that room. Note that the mediator can only assign participants to rooms after they join the meeting.



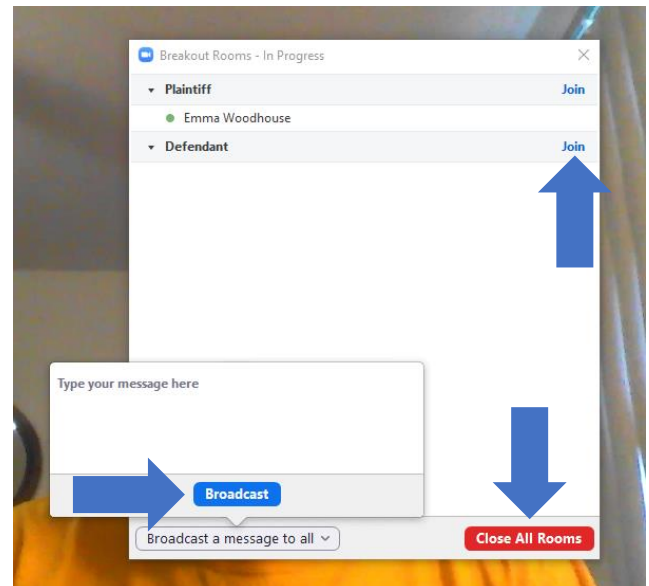


7. There are several additional settings located in the “Options” menu at the bottom of the window.
 - a. Select “Move all participants into breakout rooms automatically.” This will enable you to send participants to their breakout rooms.
 - b. Check the second box if you would like to permit participants to leave the breakout session on their own.
 - c. Set the “countdown timer” for ending a breakout session to the desired length. Note that you cannot change this setting after a breakout session has begun, so a shorter timer is recommended.

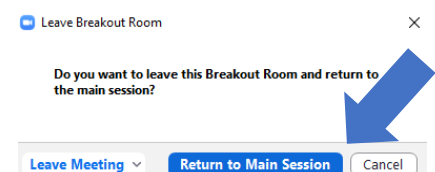
8. Click “Open All Rooms” to begin breakout sessions.

9. A mediator has several options during breakout sessions.

- a. If the session is a break, she may remain in the main room for the duration of the break. During this time, she may use the “Broadcast” function to communicate with both rooms simultaneously. Click “Close All Rooms” to end all breakout sessions.
- b. If the session is a caucus, she may join one of the breakout rooms, by using the “Join” function that corresponds to the room the mediator wants to join. After clicking “Join,” Zoom will ask whether you want to join. Click, “Yes.”



10. Breakout rooms look and function like the primary session. However, because the meeting host decides who may enter each breakout room, it creates a secure space for confidential communications.
11. To leave a breakout room, click “Leave Breakout Room.” Then click, “Return to Main Session.”



Zoom iPhone Basics

1. To log-into Zoom using your iPhone, click on the URL link that was sent. If a password was provided for the meeting, follow the prompt and enter it.

2. Once you're logged in, you should see a Zoom screen that looks something like this:

3. If you do not see the tool bar at the bottom of the screen, simply tap the bottom of the screen for it to appear.

4. The icons are similar to what you will find on Zoom on your computer display. Some icons are in similar places while others are located elsewhere.

5. To unmute yourself, simply tap "Unmute."

- To mute yourself, click the icon again.
- You are muted if the icon is red, and there is a line through the microphone symbol.

6. To have your video on, tap "Start Video."

- To stop video, click the icon again.
- Your video is stopped if the icon is red, and there is a line through the video camera symbol.

Why use your iPhone to Zoom?

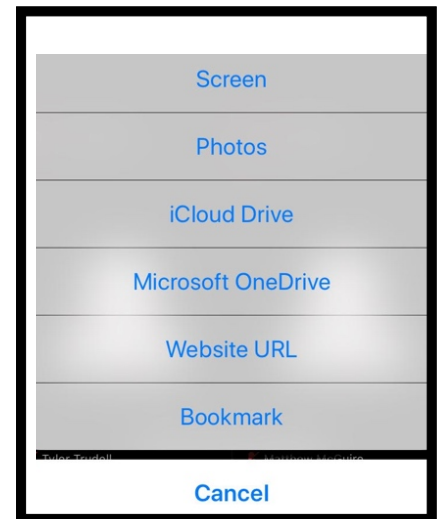
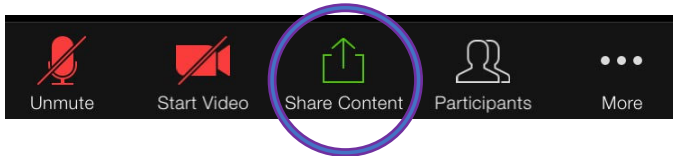
There are many reasons!

Here are a few:

1. You're on the move.
2. You don't have a good internet connection, so you rely on your iPhone to use high speed data.
3. You're using another device your computer for notes, and want to only listen-in on the Zoom call.
4. The speaker on another device does not work well.
5. It's your only option.

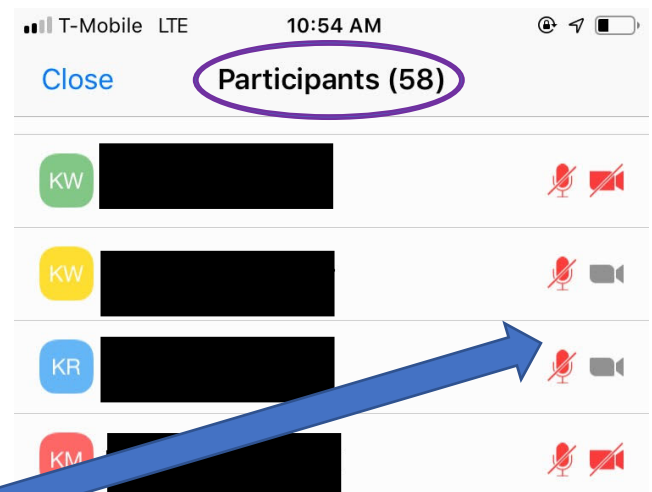


7. To share something from your iPhone, click the “Share Content” icon on your toolbar. It will then show you a list of places to select your content from. See here:

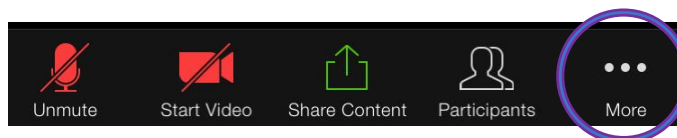


8. If you tap the “Participants” icon you will see a screen like this:

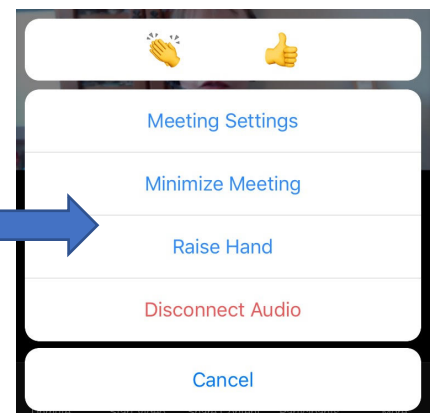
- The number of the participants will be displayed in parenthesis at the top of the screen.
- Participants initials and full name will show in list form. You can scroll down to see the full list of people present. (For privacy purposes, names are blacked out here.)
- In this window, you can see who is muted and who has their video display on or off. From here you can also unmute or mute yourself—or turn your video on or off.



9. If you click on the icon with three dots, you’ll see a screen that looks something like this:

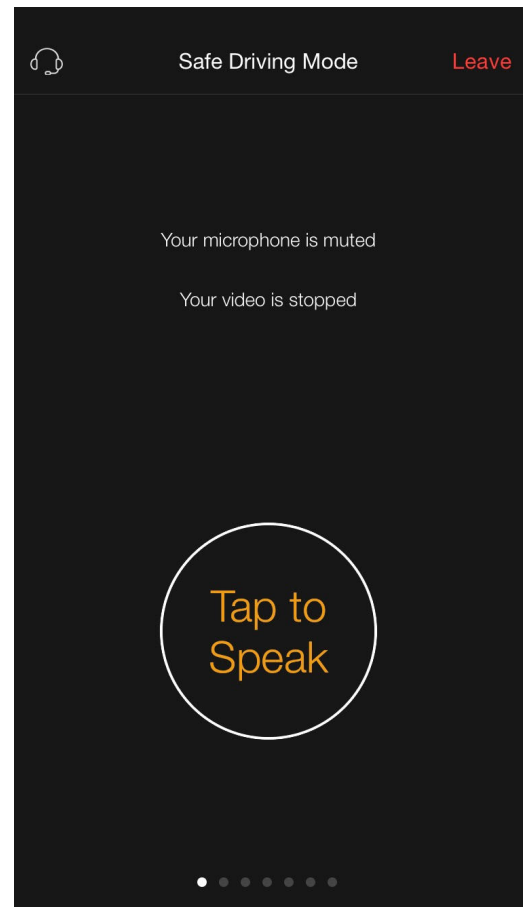


- The top emojis are “Reactions” that other participants can then see.
- Pressing “Raise Hand” creates a virtual icon that will show next to your name in the “Participants” window.
→ *This indicates that you have something to say without needing to verbally interrupt whoever is talking.*



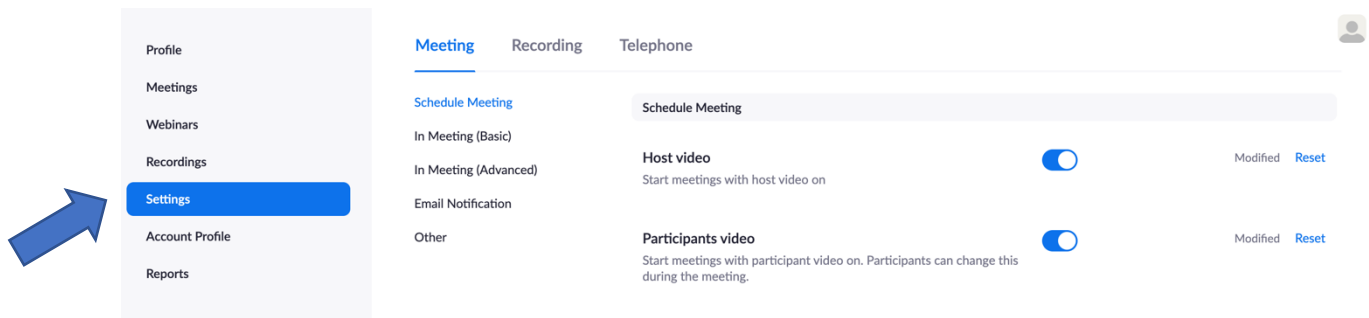
10. If you swipe right until you can no longer swipe, you will see a screen like this:

- a. This is yet another way to unmute yourself.
- b. If you swipe left once from this screen, you will see the “Speaker” featured as the largest thumbnail.
- c. If you continue to swipe right, you will see all of the participants present.



Zoom Mediation: Mediator Suggested Settings

1. Go to the “Settings” section on your Zoom page:



2. Note that the list of Zoom setting options is long. Comprised here is a number of functions relevant to online Mediation. Below are some recommendations.

DO:

- a. Turn on “Host video.”
- b. Turn on “Participant video.”
- c. Turn on “Telephone and Computer Audio.”
 - i. *It’s best practice to start with the video feature on for both the mediator and participants.*
 - ii. *It streamlines the process.*

DO NOT

- d. Allow participants to join the meeting before the host arrives.
 - i. *As the mediator and tone-setter, it is important for you to be there before anyone else arrives.*

Host video
Start meetings with host video on ☒

Participants video
Start meetings with participant video on. Participants can change this during the meeting. ☒

Audio Type
Determine how participants can join the audio portion of the meeting. When joining audio, you can let them choose to use their computer microphone/speaker or use a telephone. You can also limit them to just one of those audio types. If you have 3rd party audio enabled, you can require that all participants follow the instructions you provide for using non-Zoom audio.

- ☒ Telephone and Computer Audio
☐ Telephone
☐ Computer Audio

Join before host
Allow participants to join the meeting before the host arrives ☐

Chat Function

3. Recommend enabling Chat function.

a. *For privacy purposes, ALWAYS ENABLE: "Prevent participants from saving chat."*

b. *Note: you may need to adjust your Recording Settings to prevent this. See here.*

Chat

Allow meeting participants to send a message visible to all participants



☒ Prevent participants from saving chat

You have enabled "Save chat messages from the meeting / webinar" in cloud recording. You can go to [Recording Settings](#) to turn it off and not share the chat along with the recording.

Private chat

Allow meeting participants to send a private 1:1 message to another participant.



4. Consider if you would like to enable Private Chat.

a. **Pros:**

- i. It may be helpful for a participant to have private correspondence with their attorney, or you as the mediator.

b. **Cons:**

- i. A participant may chat with another participant without your knowledge. Or, a private message could be sent to the whole group.

5. **NEVER** allow "Auto Saving Chats."

- a. This function is akin to shredding mediation notes.

Auto saving chats

Automatically save all in-meeting chats so that hosts do not need to manually save the text of the chat after the meeting starts.



6. **DO ENABLE:** "Play Sound When Participant Joins or Leaves."

- a. *This serves as a courtesy announcement that someone new has entered the room.*
- b. *This is particularly helpful for the breakout room function.*

Play sound when participants join or leave

Play sound when participants join or leave



☒ Heard by host and all attendees

☐ Heard by host only

When each participant joins by telephone

☐ Record and play their own voice

Why Chat?

Simple and quick way to communicate or update status. Ex: poor internet connection.

Avoid interrupting to ask questions.

Participant can privately tell the mediator that she wants to caucus.

Share access to information, like webpage links.

Screen Share Function

1. Turn on “Always Show Meeting Control Toolbar.”

- a. *If someone’s toolbar does not show up, encourage them to move their mouse over the bottom of their screen.*

Always show meeting control toolbar

Always show meeting controls during a meeting 



Show Zoom windows during screen share 



2. Allow “All Participants” the screen sharing capability.

- a. *This is helpful if participants want to share anything related to the mediation so that all can see.*

Screen sharing

Allow host and participants to share their screen or content during meetings



Who can share?

☐ Host Only ☒ All Participants 

Who can start sharing when someone else is sharing?

☒ Host Only ☐ All Participants 

Save

Cancel

3. Maintain “Host Only” for the prompt “Who Can Start Sharing When Someone Else is Sharing.”

- a. *As the mediator, it is best to maintain this sole capability.*

An Online Mediator’s Dream: The Breakout Room Function

1. **DEFINITELY DO** set up the “Breakout Room” capabilities.

- a. This feature allows you as the mediator to caucus with each of the participants, while still having the opportunity to participate in a joint session.
- b. This feature also allows participants the opportunity and privacy to meet with their own attorney in a separate room.
- c. *Note: This is why the “Play Sound When Participant Joins or Leaves” function is particularly important to turn on. (See No. 7 on Page 2).*

Breakout room

Allow host to split meeting participants into separate, smaller rooms



☒ Allow host to assign participants to breakout rooms when scheduling



Zoom: Make Access Easy

1. One way to create easy Zoom access is to turn on the “Show ‘Join From Your Browser’ link.”
 - a. This means that participants can join the meeting, even if they have not downloaded Zoom.

Show a "Join from your browser" link



Allow participants to bypass the Zoom application download process, and join a meeting directly from their browser. This is a workaround for participants who are unable to download, install, or run applications. Note that the meeting experience from the browser is limited