Administration for Community Living Office of Healthcare Information and Counseling

Managing Through COVID-19 Work grouP - September 2020

Technologies for Counseling Virtually

Preparing for Remote Medicare Open Enrollment Toolkit

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## Introduction

The U.S. Administration for Community Living (ACL) Office of Healthcare and Information Counseling (OHIC) programs serving Medicare beneficiaries are available to help with Medicare and health plan questions during the COVID-19 pandemic. Despite complications caused by the coronavirus health emergency, these programs continue to find creative, socially distant solutions to providing local, in-depth, and objective insurance counseling and assistance to Medicare-eligible individuals, their families, and caregivers. This document is meant to provide some best practices to help you prepare. The resources shared are not all-inclusive, but they are reliable options that are common and low-cost or free to use. The purpose of this document is to give you some options for virtual counseling.

# Webex

According to the Webex website, Webex[[1]](#footnote-2) is an online platform for hosting virtual meetings. Webex can also be utilized to host virtual counseling sessions.

Why would I want to use Webex?For most of us, face-to-face counseling is the preferred option. If you are unable to physically meet, a virtual counseling session may be the next best choice. A virtual meeting allows you and the participant to see each other, replicating a face-to-face meeting. You can also share your screen with the participant. For example, if you are running a Part D plan comparison, they would be able to see the costs and options in real time.

What equipment do I need to HOST a Webex session?You just need a computer, tablet, or smartphone. The same is true for the attendee.

Do those I invite to a meeting need a Webex account?The person “hosting” the meeting needs to have an account. Those joining the meeting do not need an account. They simply need to be invited to the meeting and will join using a link or meeting information.

How much does Webex cost?You can sign up for a free Webex account. Free accounts allow you to host meetings but have a time limit for each session. There are also paid options. The paid plans come with additional features that are not necessary for hosting counseling sessions.

## For a demonstration on how to use Webex check out the links below:

* How to use Cisco Webex for Video Conferencing and Online Meetings  
  <https://www.youtube.com/watch?v=5WywiTZEIS8>
* How to Use Webex Meetings + Best Practices  
  <https://www.youtube.com/watch?v=M0soUKfB9xA>
* Webex Meetings: How to Mute, Kick, Expel Participants  
  <https://www.youtube.com/watch?v=pQo7a_EoID0>

# Microsoft Skype

The information in this section is from the Skype**[[2]](#footnote-3)** website.

Skype is software that enables the world's conversations. Millions of individuals and businesses use Skype to make free video and voice one-on-one and group calls, send instant messages, and share files with other people on Skype. You can use Skype on whatever works best for you – on your mobile device, computer, or tablet.

Why use Skype?Skype is an application for instant messaging, voice calls, and video chats. It allows users from any region or part of the world to connect and communicate with one another.

What equipment do I need to host a Skype session?You will need a computer with a web camera and/or built in microphone for the full audio and video experience. Skype meetings can just be audio if preferred. Use the Meet Now feature in Skype to set up a meeting right away without using Outlook to schedule a meeting in advance.

Do those I invite to a meeting need a Skype account?Meet Now in Skype allows you to easily set up a collaboration space and invite participants. Participants can easily join meetings whether they have an account or not.

How much does Skype cost?Skype to Skype calls are free – but to call a mobile or landline from Skype, you need Skype Credit or a subscription. The price you pay depends on the country you are calling to, not the country you are calling from.

* [Subscriptions](http://www.skype.com/go/subscriptions/) are monthly calling plans that let you make unlimited or fixed-minute calls to landlines (and mobiles, where applicable). A subscription is helpful if you make a lot of calls.
* [Skype Credit](http://www.skype.com/go/skypecredit) is a pay-as-you-go option. Skype Credit is a good option if you need to make a few calls and only want to pay for what you use.
* A [Skype Number](http://www.skype.com/go/onlinenumber) is a phone number you pay for monthly. People can call you from their mobile or landline, and you answer the call in Skype.
* [Skype to Go](http://www.skype.com/go/skypetogo) is a pay-as-you-go option that allows you to call people all over the world for the price of a local call by giving you a local number on which to call them.

## For a demonstration on how to use Skype check out the links below:

* How to use Skype – Beginners Guide  
  <https://www.youtube.com/watch?v=NRcb3uB3Jac>
* Skype for Beginners – Getting started  
  <https://www.youtube.com/watch?v=Bhwens7f_tg>
* How to Use Skype   
  <https://www.youtube.com/watch?v=S38e-t6rhKA>

# Zoom

The information in this section is from the Zoom[[3]](#footnote-4) website.

Zoom offers video and audio conferencing, chat, and webinars. It uses a cloud-based peer-to-peer software platform.

## Why use Zoom?

Zoom is easy to set up, use, and manage. Zoom provides straightforward purchasing and deployment with no hidden fees. It takes one click to start or join any meeting, and Zoom provides easy collaboration and participant controls.

## What equipment do I need to HOST a Zoom session?

* Internet Connection
* Microphone
  + Built-in, USB plug-in headset, or wireless Bluetooth
  + USB headset with microphone and earphones is recommended
    - Use Logitech, Jabra, or Plantronics
* Webcam
  + Built-in or USB connected
* Compatible operating system
  + Zoom supports Windows, Mac, and Linux

## Do those I invite to a meeting need a Zoom account?

You don't need a Zoom account to join a meeting — but you will need one to do just about everything else. If someone else has scheduled a meeting, you can join the link or dial-in without making an account — as long as you were sent an invitation.

## How much does Zoom cost?

You can obtain Zoom free. With a free account, you can host up to 100 participants, you can have unlimited one-on-one meetings, and you can host group meetings with a 40-minute limit. With a paid Zoom account, you can host more than 100 participants, and you can host a meeting beyond 40 minutes (up to 24 hours).

## Zoom Security:

Zoom appears to have overcome earlier security issues. [Click here to learn more about Zoom security](https://blog.zoom.us/its-here-5-things-to-know-about-zoom-5-0/?zcid=3753&creative=430738469005&keyword=+zoom%20+security&matchtype=b&network=g&device=c&gclid=EAIaIQobChMIrr2XqJHz6gIVRT2tBh22GAFnEAAYASABEgLWBPD_BwE), Zoom offers the following security to protect meetings:

**Available to the meeting host:**

* Secure a meeting with encryption
* Create Waiting Rooms for attendees
* Require host to be present before meeting starts
* Expel a participant or all participants
* Lock a meeting
* Screen share watermarks
* Audio signatures
* Enable/disable a participant or all participants to record
* Temporary pause screen-sharing when a new window is opened
* Use a passcode to protect a meeting
* Only allow individuals with a given e-mail domain to join

**Can be switched or toggled:**

* Join before host, or not
* Use personal meeting ID when scheduling a meeting or when starting an instant meeting
* Require password for personal meetings if attendees are allowed to join before host
* Generate and require password for participants joining by telephone

## For a demonstration on how to use Zoom check out the links below:

* Using Zoom for Meetings:

<https://www.youtube.com/watch?v=fMUxzrgZvZQ>

* Using Zoom for Counseling:

<https://support.zoom.us/hc/en-us/articles/115005759423-Managing-participants-in-a-meeting>

* Using Zoom for Presentations:

<https://www.youtube.com/watch?v=Zf4C2fJYqHk>

* How to join Zoom as a participant:

<https://www.youtube.com/watch?v=fGbpwZNW3oI>

# Google Duo

The information here about Google Duo is taken from the Google Duo[[4]](#footnote-5) website.

Google Duo is a video and audio calling app. It works across Android and iOS phones and tablets, smart devices, and on the web.

## Why use Google Duo?

Duo is a simple video-calling service that's available for Android and iOS. In addition to video calls, you can also make regular audio-only calls on Duo, send a note and leave a message.

## What equipment do I need to HOST a Google Duo session?

Google Duo is a free service. Before you set up and use Google Duo you need a phone number and access to a phone that can receive SMS messages.

## How much does Duo cost?

Duo is free to use.

## Does it use my minutes?

Duo works over Wi-Fi and cellular data so you can make calls anywhere you have internet access. Make sure you are connected to Wi-Fi, otherwise, you will be charged. If you're running out of monthly data on your mobile plan, you can lower how much data you're using while making calls with Google Duo. Keep in mind, Duo works over Wi-Fi and cellular data so you can make calls anywhere you have Internet access.

Note: When your device is connected to Wi-Fi, Duo still uses a small amount of mobile data. This keeps your conversation going if the Wi-Fi drops. To stop using mobile data as a backup, follow the instructions in "Turn mobile data off."

## How to use Duo:

1. Click the Duo app (on Android devices this app is pre-installed)
2. A list of your contacts who are connected to Duo will populate on the screen
3. If your contact is listed, choose their name and either start a voice call or video call
4. If a contact is not listed, click invite friends
5. Find the person you would like to add or dial the number you want to invite
6. Once you find the person you would like to invite, click invite
7. You will be prompted to compose an invite which sends a link to your contact who will be responsible for adding you on the video chat
8. Once the person has downloaded the app, you will be able to communicate

## For a demonstration on how to use Google Duo, check out the link below:

* <https://www.youtube.com/watch?v=c-EMHbvsV7Y>

# FaceTime

The information in this section about FaceTime[[5]](#footnote-6) is from the company website.

FaceTime is Apple's video and audio calling service. You can use it from any iPhone, iPad, iPod touch or Mac, to call anyone else using any one of those devices.

Why use FaceTime?FaceTime requires Wi-Fi or any other form of internet connection to operate properly. The application is familiar to many Apple users and may be easier for some navigate as a result.

What equipment do I need to HOST a FaceTime session?  
You need a supported Apple device — an iPhone, iPad, iPod touch or Mac laptop — and the person you're talking with needs one of those, too. You can use FaceTime between these devices as well, so an iPhone can use FaceTime with a Mac, and a Mac can use FaceTime with an iPad, and so on.

Do those I invite to a meeting need a FaceTime account?  
It is restricted to the community of iOS users. There is no FaceTime app for Android devices, and there is no way to FaceTime with an Android user.

How much does FaceTime cost?Facetime is not like a standard call as you are not billing for the time that the call lasts instead you are charged for the amount of data that you use during the call. Facetime is free when using Wi-Fi; however, it will use your data allowance using a GPRS, EDGE or 3G connection.

## Turn on FaceTime:

On your Apple device, Go to Settings > FaceTime. If you're using an iPhone, FaceTime automatically registers your phone number. To also register your email address on your iPhone, go to Settings > FaceTime > Use your Apple ID for FaceTime, and sign in with your Apple ID.

If you're using an iPad or iPod touch, register your email address by tapping Settings > FaceTime > Use your Apple ID for FaceTime, and sign in with your Apple ID.

## Initiating a FaceTime call:

* In the FaceTime app (which is a green video icon), tap the plus button  and type the person's phone number or email address. Tap the number or address, then tap Audio  or Video .
* If you have the person's phone number or email address saved in your Contacts[3](https://support.apple.com/en-us/HT204380#notes), you can start typing their name and tap the name when it appears. Then tap Audio  or Video .
* You can also start a FaceTime video call from your iPhone during a phone call. Tap the FaceTime icon in the Phone app to switch to FaceTime.[[6]](#footnote-7)

## Initiating a Group FaceTime call:

**Click on the green icon, FaceTime**

1. From the call, tap the Add button on the top right
2. Add **the person**
3. Enter the contact's name, phone number or email address
4. Click the Add button to enter other people onto the call
5. Click on Video
6. All the people invited to the call will be present on the group FaceTime call[[7]](#footnote-8)

## For a demonstration on how to use FaceTime check out the links below:

* FaceTime the Ultimate Guide:

<https://www.imore.com/facetime>

* How to make a FaceTime call on your iPad

<https://www.businessinsider.com/how-to-facetime-on-ipad>

* FaceTime Tutorial

<https://www.youtube.com/watch?v=MYTmluTcD6I>

# Things to know for a successful virtual counseling session:

* **Be familiar with application you are using.** Know the ins and outs of setting up and facilitating a meeting using the program, and be ready to help troubleshoot issues the participants may have.
* **Check your internet connection**. Test the connection beforehand by running a quick practice call with a few coworkers or friends.
* **Don’t stray from the purpose of the call.** The face-to-face connection that comes with a video call can help the conversation flow more easily than it does in an audio call; however, remember to focus on the counseling purpose of the call.
* **Be a few minutes early**. Login early and be ready to start a few minutes ahead of time, observe proper professional meeting behavior throughout the meeting.
* **Mute yourself when you’re not talking.** Muting yourself every time someone else is speaking prevents others from hearing any background noises around you.
* **Use headphones.** Wearing headphones helps you hear everyone more clearly and vice versa.
* **Dress for the occasion.** Be presentable (if using video).
* **Be aware of your surroundings.** Adjust your work setup so that you face a window or are exposed to plenty of light. And make sure your background is professional and work appropriate. Additionally, ensure you have a private place for a confidential counseling session.
* **Stay seated and stay present.** Put the camera down, do not walk around with your camera or computer. When you do this, turn off the camera, otherwise, everyone is going to get very dizzy.
* **Be considerate**. Let other people speak, then when they are done, chime in, and when finished, mute your microphone.
* **Close other desktop applications.** Be conscious of what you have open on your computer when you share screens during these virtual meetings. Close things you don’t want to be seen and make sure that you are sharing only things that need to be shared and not your personal information.

1. https://help.webex.com/en-us/ [↑](#footnote-ref-2)
2. https://support.skype.com/en/faq/FA6/what-is-skype [↑](#footnote-ref-3)
3. https://support.zoom.us/hc/en-us/articles/206175806-Frequently-asked-questions [↑](#footnote-ref-4)
4. https://support.google.com/duo/?hl=en#topic=6376099 [↑](#footnote-ref-5)
5. <http://www.aliencodec.com/benefits-of-using-facetime/> [↑](#footnote-ref-6)
6. Content from: <https://support.apple.com/en-us/HT204380> [↑](#footnote-ref-7)
7. Content from: <https://support.apple.com/en-us/HT209022> [↑](#footnote-ref-8)