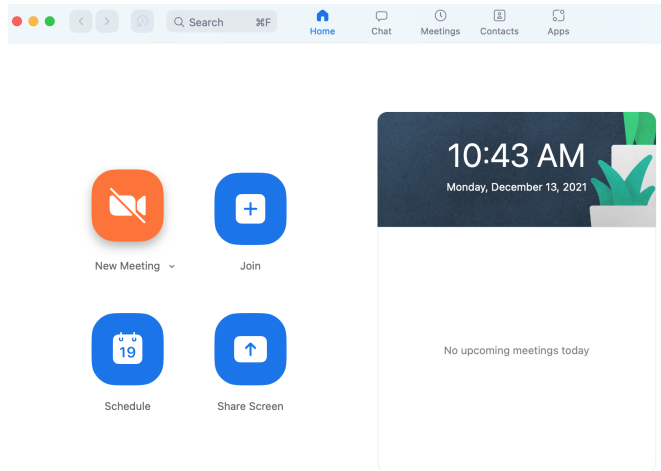# 1-1 Scenarios - Common Topics, Challenging Situations, Tips, and Terminology

<u>Common topics</u>
Zoom basics

these instructions/diagrams vary depending on device and software

1. Briefly explain what the four boxes mean
   a. New meeting: you (the host) is creating a meeting which others can join. (i.e. they can create a new meeting and invite friends to join it so they can chat together while seeing and hearing one another)
   b. Join: somebody else has already created a meeting and you are joining it. (i.e. a friend has started a meeting and is asking you to join). You will need a meeting ID and sometimes a password to join their meeting. A meeting ID is a unique number someone gets when starting a meeting (it can be random and change each time, or may remain the same so it's their own personal meeting ID, similar to a phone number. This depends on which option they choose, and people usually choose one or the other based on their privacy.
   c. Schedule: when you want to create a meeting ahead of time. (i.e. if you make plans with friends to do a zoom meeting at 2 oclock on Friday, you can schedule it for then, so that at that time you just have to press "start meeting" which will appear under the date/time on the right hand side of the screen).
   d. Share screen: typically done during a meeting, allows others to see your screen or vice versa, but you still control/move things around, they just see what you're seeing.

Join Meeting

Meeting ID or Personal Link Name

Your Name
Your Name

☐ Don't connect to audio

☐ Turn off my video

Cancel   Join

2. Guide them through joining a meeting.

    a. Instruct them to enter a meeting ID (can provide yours) and let them know they always need to have this when joining a meeting, it's the same as how if you call someone you need to have their phone number.

    b. Instruct them to enter their name- they can enter just their first name, first and last name, or initials, depending on what they're comfortable with others seeing- let them know this can always be changed.

    c. Then, the check boxes may or may not be checked off. Let them know that if they don't want audio or video on right from the start (i.e. if they want to turn it on later), they have to click both these boxes

3. The next step is to have them actually join a meeting

    a. Typically a box will pop up right away with a message about joining audio, instruct them to click the "join with…" button- this will say something like join audio, join with computer audio, join with wi-fi or cellular data (slightly different on different devices).

4. Once they are in the meeting, go over the various functions. First, cover the basics of how the audio/video buttons work (when the red line is through the buttons, it is off, otherwise it's on). Then, go over the additional functions such as the chat, share screen, and raise hand/reaction features. Show them where each of the buttons are and how to use them and make sure they have sufficient practice using each.

Unmute   Start Video

Participants 1   Chat   Share Screen

👏 👍 ❤️ 😂 😮 🎉 •••

✋ **Raise Hand**

^   Record   Reactions   Apps
en
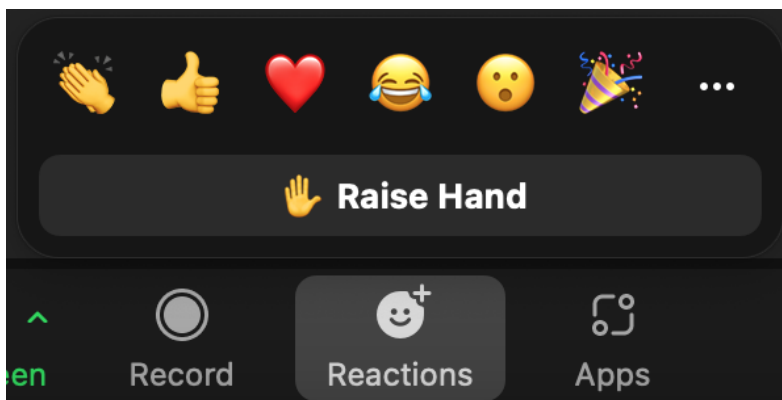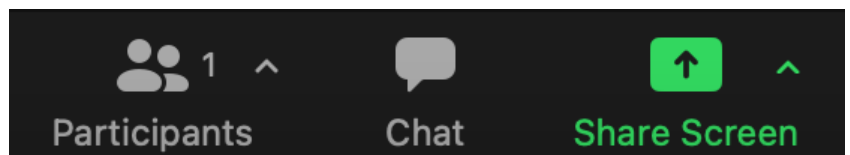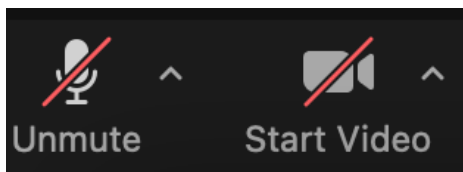
How to create a zoom account

First, find out what the senior intends to use zoom for. If they only need to join meetings, advise them they do not need to create an account (it will save them more time and energy trying to create an account if it's not necessary). However, if they want to create meetings of their own, then they need to create an account. To do this they will need an email address, so confirm they have one that they're able to access. Then, you can go through the steps of creating an account either online on the zoom website or through the zoom app.

Use screen share to show senior/have them show you things

- Before you instruct them on sharing their screen, you need to go into the participants menu and make the senior the host
- To use screen share they need to first locate the button, you can help them find it by pointing out the green button on the bottom of the screen that says "share" (either just share, or share screen, or share content). If they can't find it, have them tap on the screen (this can be anywhere) and this will make the buttons come up from where they're hidden out of view at the bottom.
- Once they press the share button a myriad of options will come up but these vary depending on the device they're using. They will want to select the option that either says screen or desktop/window, or they may just need to press share. Once they've made their selection (unless their device doesn't prompt them to), there is typically either a blue or green share/ start broadcasting button that pops up, and you should instruct them to press that. On most devices, it will automatically start sharing at this point. On android devices they will usually have to go to their home screen and then it begins sharing.
- Once they are sharing you will be able to see everything on their screen but they will still have control, so you'll still have to instruct them what/where to press.
- If screen sharing doesn't work there are some things you can try. First, go to the app store/play store/other app store, and double check if zoom needs to be updated, this is the most common problem with not being able to screen share.

How to teach the basics without using terminology

Think about how you view technology and how you might explain it to someone who's never seen a cellphone before. How would you explain to them how to search for something on the internet? Some of the seniors who reach out to us for help do face this challenge of being "technology illiterate" because they don't know the language. For example, if you said to press the home button to open the phone, swipe to the right screen, click on the google app, and type your question into the search bar, they will likely have no clue what you're saying- it might as well be another language! This type of talk/explanation is normal to us and we could follow these directions easily, but for seniors who have maybe never used devices it's far more difficult.

For the same example, try breaking each step down into baby steps, and use descriptive language that can help them to follow your directions. For example, if they're seeking help for an iphone, you can tell them to orient the phone so the circle button is on the bottom. Then, tell them to feel along the top edge of the phone for the small rectangular button. Once they've found that they can press it which will illuminate the screen. Once the screen is on, they can press the circle button on the bottom and it will open the phone. (they may need all of this instruction, just to figure out how to turn on the phone!). Try to keep this in mind when working with someone who is learning the basics and try to remember to go slow and be patient. I've included some alternate phrasing for some common terminology that you can use for those if they don't know the terms. However, don't completely avoid teaching them these terms, as they're also important to know. So you can say, press the circle button at the bottom of the screen, this is the home button and they can begin to associate the function with the term.

- Home button: circle button along the bottom
- Swipe: gently but swiftly slide your index finger one direction to another (i.e. left to right or up and down, depending on what they're trying to do)
- Type: scan the screen for the letters you need and press each one to write out a word/phrase
- Google/search it: on the screen look for the app (either safari or google, or another browser), press it. Once the screen opens, look for the search bar, it will be a long, empty, rectangular box either along the top, or in the middle of the screen. Once you find that you can type in what it is you're looking for, and if needed be specific
- Email: a service on the internet that you can send messages to others. It's similar to sending a paper letter, but electronically.

Challenging situations

Senior is having a medical situation

In some rare, but challenging circumstances, a situation may arise where a senior has a medical emergency while on the phone. If this ever happens, be calm and try to help in whatever way is comfortable. If the senior is seeking assistance and is ok, you can end the call and let them seek help for whatever is going on. Please email scheduling@cyberseniors.org <u>IMMEDIATELY</u> if this happens.

Sometimes, seniors may also mention they have a disability or they can't make their scheduled appointment due to illness. In these cases, you can respond with compassion, and usually they just want someone to listen because it's often a heavy weight to bear. You can also ask them if they're still feeling up for the session or if it would be best to reschedule. Sometimes, they're ok to continue with the session, others it may need to be a shorter call, and at times the senior may choose to reschedule. If that is the case, please go through the calendly form with them to reschedule their appointment for another time. It's also a very kind, polite gesture if you end the call with best wishes (i.e. "I hope you feel better!").

Senior mentions a loved one has passed away

Sometimes, when we call a senior they may comment that there's been a death in their family so they will need to reschedule. In this situation, it's best to keep the call short, because they're likely grieving and under a lot of stress. Offer your sympathies (i.e. "I'm sorry for your loss"), and to reschedule the session for another time. If they'd like you can complete the calendly form to reschedule them, or just offer our contact information (scheduling@cyberseniors.org or 844-217-3057) for them to get in touch with us once things have settled.

Tips

➔ **Impatient senior**

Scenario:
The senior feels the conversation is not going anywhere, and the pace is not what they had in mind.

Tips:
- Apologize for not being able to help more or meet their expectations at the moment.
- Changing the dynamic of the situation like saying, "it seems like the device is not cooperating with us today,"
- You could also ask the seniors if they will feel more comfortable having the conversation later on whether they would like to be assisted by somebody else in the future or get in touch with you again if you both agree on it.

➔ **Indecisive/Quiet Customer**
Scenario:
A senior is unsure if teaching them over the phone will help their case or doesn't seem engaged.

Tips:
- Try to get them to verbalize their concerns. For example, what are their thoughts on the topic?
- Once you get them talking, you can understand which options will work best for the session.

➔ **You Don't Have An Answer**
Scenario:
A unique or unusual circumstance has arisen, and you do not have an immediate answer for the senior about how to proceed. Saying that you don't know won't always be the best approach to the situation.
Tips:
- A positive way to handle it is to let the senior know that you will research available and alternative options to troubleshoot the issue.
- It is essential to make sure they are still with you while you seek answers. Timely feedback.
- If the case needs to be escalated has passed, and you still don't have an answer yet, you can let them know that it will be necessary to hang the call and get back to them as soon as possible.

➔ You Made A Mistake

Scenario:
It happens sometimes. Everyone makes mistakes, but it can feel embarrassing during a 1-1.

Tips:
- Evaluate the situation with honesty and as objectively as possible. Then, apologize, and let them know that you acknowledge the mistake made.
- Being truthful is important in a case like this.
- Show empathy to the senior, and let them know that you would be disappointed if you were in their place.

➔ Demanding

Scenario:
Occasionally, you may encounter seniors who feel they know what they want so well. As a result, they refuse to listen carefully or follow instructions. They appear to be set in their ways.

Tips:
- Be respectful of their wishes, and appreciate the fact that they've put some time into thinking things over. Then, politely let them know the importance of agreeing on the subject to be taught to accomplish the 1-1 purpose.
- The essential thing in a situation like this is to be an available source of information.
- We can inquire if they would like to try their ideas on their own and contact us if something didn't go as planned, trying to be a source of helpful tips or if they are willing to move forward with the guidance you can provide in the call based on your knowledge.

Helpful ideas you can teach seniors in the digital age

➔ Define the Value

For instance, telling the senior that learning how to use a video chat will allow talking with a friend they haven't seen in years on a Zoom call or seeing photos of their grandchildren when their family shares their screen.

➔ Address Security Concerns

Seniors worry about security and keeping their private information safe whenever using the internet. If possible, provide understandable tips on setting secure passwords such as combinations of numbers, letters and characters that they can relate to—mentioning the importance of having passwords written securely and at a place that is accessible enough for them but not evident for other eyes.

- Most internet security issues occur due to online scammers and not internet security breaches. Familiarize seniors with issues like accepting connection requests from people they don't know on social media, the risk of sending their personal information such as credit card or social security numbers via email or chat, and being cautious with clicking on suspicious links.

➜ **Take It Slow**

It is good to gather their experience with technology before. Starting with simple things and recommending more sessions if they are grasping concepts and terms slowly.

When providing tech help for seniors, what seems to work better is not giving them too much to do at once, or they might feel overwhelmed.

It is also essential to understand the emotions that may arise as time passes in a call and be able to take slight pauses or ask them if they wish to continue.

➜ **Show Patience — Even When Teaching Gets Repetitive**

The more engaged they are, the more they will absorb. You may need to repeat concepts or steps multiple times until the senior gets the hang of using the tools you are training them on.

- Reassure them and tell them that's okay.
- Help them think of the times they acted as a teacher and had to give their pupils various tries to get something right — whether coaching one of their family members on doing something or self-teaching a new skill such as knitting.
  - ➜ Write It Down

As you walk through the different tasks seniors require to complete their 1-1, encourage them to write it down. The use of a notebook where they can log passwords and usernames if they are unfamiliar with password managers, the URLs of their most useful websites, and specifications on how to use their apps.

If they get lost or forget how to do something, they can run over their memory by reading from their handwriting.
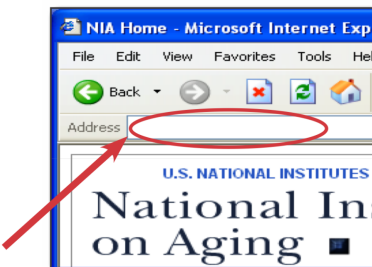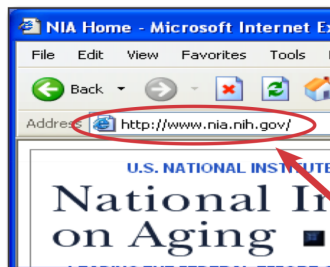
Terminology

- ## Search bar - aka address box

Address Box

A narrow, rectangular box in the browser window where you can type in a web address. Typing in the web address in the address box and hitting Enter on the keyboard will take you to a website.

Address Box

Web Address (URL)

- ## Back and forward/next arrow
    - May also be another arrow (not necessarily green) in one of the top corners of the screen/box. It typically points to the left (back) or right (forward/next)

Back Arrow

This arrow, often green, is found at the top of most browsers. When you click on the back arrow, it takes you back – in order – through all of the web pages you've seen. (Sometimes called the back button.)
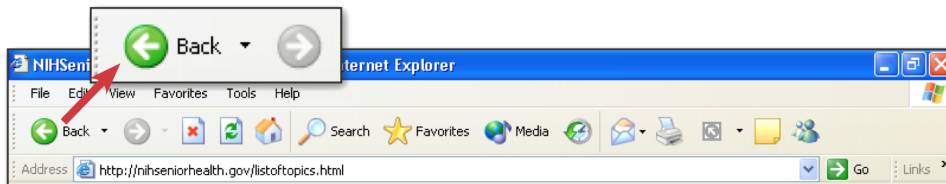
Forward Arrow

This arrow is present at the top of most browsers. When you click on the forward arrow, it takes you forward to a page you just left and is opposite in direction from pages the back arrow takes you through. When the arrow is gray, the forward function is inactive.
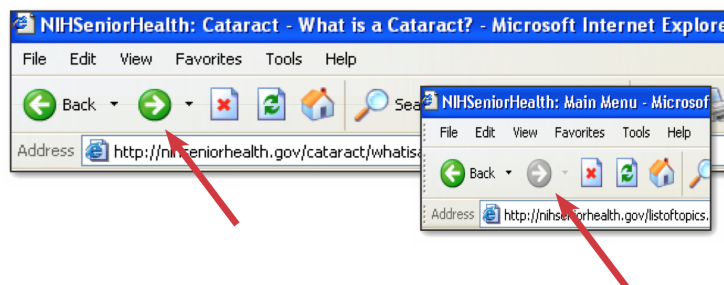
- Make sure you're careful about describing buttons as some may be on the physical device (i.e. the button to turn on a phone) or on the screen (i.e. clicking the next button), this can be very confusing to seniors and may take them some time to wrap their head around it.

Button

Small box that looks like it's being depressed when you select it. Buttons can turn on (and turn off) many types of functions on the Internet.

Click for answer

Drop Down List

A list of items from which you can make selections.

A. When you first see a box containing a drop down list, the box will be empty or may display only a single item.

B. To see a list of choices, left click on the arrow in the box and hold. The list of choices will display above or below the box.

C. Keeping your left index finger pressed on the mouse, move the cursor to the desired choice (In this case, a quantity of 3 booklets).

D. Release your left index finger from the mouse, and your selection will appear in the box. The full list of choices will disappear.
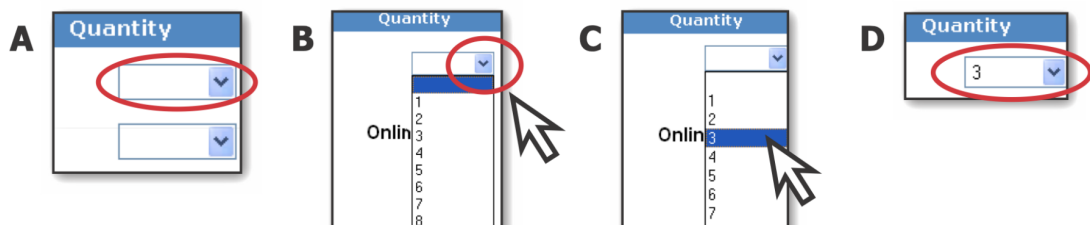
- <mark>Home page</mark>

Home Page

The first thing you see when you come to a website, or the opening page of a website. It provides information about the site and directs you to other pages on the site.

- <mark>Icon</mark>
  - This can also be called an app, button, picture, etc. but the broadest term that applies to all devices is icon.

Icon

A small picture or image representing a command (such as print), a file, or a program. When you click on an icon, you start a command, open a file, or launch a program.
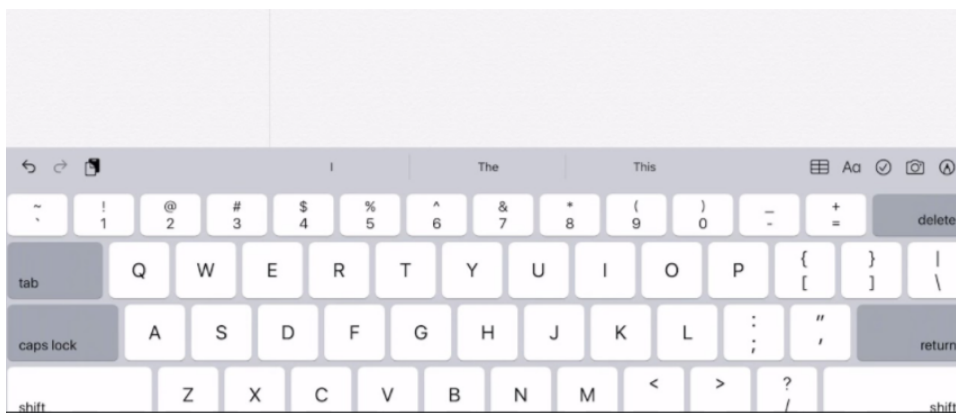

- <mark>Keyboard</mark>
  - Will typically look something like the image below (for on-screen devices such as cellphones, tablets) and pop up at the bottom of the screen when indicating (by tapping in a text space) that you want to type something.

Keyboard

The keys that operate the computer, very much like a typewriter, with extra keys for special functions.

- <mark>Link</mark>
  - Aka hyperlink. Also common for tablets- long lines of a mix of text/numbers in blue and underlined.

Link (or hyperlink)

A highlighted or underlined feature on a web page that, when clicked, will take you to another web page. A link most often appears as underlined words or an image.

One sure way to tell if something is a link or not: Whenever your cursor turns into a pointing hand, the image or word you are pointing to is a link.
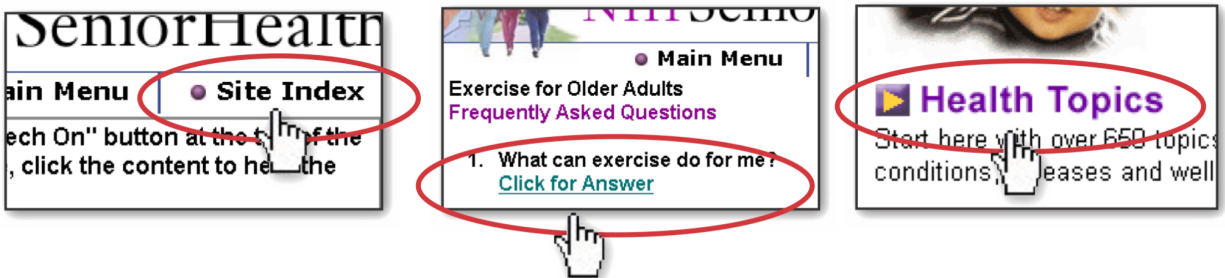
- <mark>Log on/ log in</mark>

Log On

To gain access to a computer system or to a page on a website by entering a password or user ID.

- **Email/ username**
  - When signing into a site it may require an email or username to sign in (these are usually provided or created when an account is made). An email usually consists of a name and sometimes numbers with the email provider at the end (i.e. cyber1234@gmail.com) while a username usually does not have the ending (i.e. cyber1234) .

- **Scroll/scroll bar**
  - Can scroll using your finger to move the page in the direction you want (typically for touch screen devices like phones/tablets) or by using a scroll bar, typically found along the right hand side and/or bottom of the screen and moving it up or down/left or right.

Scroll

To move text or other information on a computer screen up, down, or sideways, with new information appearing as the old disappears.

Scroll Bar

A narrow, rectangular bar on the right edge and bottom edge of a web page that lets you move the page to see more of the information it contains. The scroll bar on the right moves the web page up and down, and the scroll bar on the bottom moves the web page right and left.

Scroll Bar

Scroll Bar