



Initial Tech Call Protocol

Purpose

The goal of this call is to make sure the resident you are matched with feels comfortable and confident using Zoom to chat with you weekly! Technology can often be frustrating for older adults - so your job is to be patient and a problem solver every step of the way! It is a great way to bond with your match from the start. **If your initial tech call only runs 10-30 minutes, you can do your first meeting materials directly after!** This means you can get to know your match, ask questions, go through the activity catalog together, and start your bonding as a Perfect Pair! If it lasts the full hour, you can go through these materials at your second meeting. Please email your executive board with any questions you may have!

Protocol

1. At 9AM the morning of your first meeting with your match, you will send them an email using the following template/something similar (on your email, bcc: your executive board email):

Good morning *insert Resident name*,

My name is *insert your name*, I am your match through the Perfect Pair program, and I can't wait to talk with you every week!

For our first meeting, you indicated you wanted an initial technology call where I will walk us through using Zoom and getting set up from a technology standpoint. I will call you at ***insert time in bold*** to your cell phone number indicated on your application.

Can't wait to talk to you then!

Insert Your Name



2. At the time of your scheduled meeting, call your match at their phone number using Google Voice
 - a. Download the Google Voice app to your phone



- b. You may need a personal Google account to utilize this service, your school email might not work
 - c. Visit <https://www.youtube.com/watch?v=5mFGhHEhY6I> for a tutorial on creating a Google Voice phone number
 - d. You can use this number to call your resident and text them information, but they will see it as a different number and not be able to contact you directly!
3. When they answer the phone, introduce yourself! Express how excited you are to get to know them through this program, and tell them a brief intro (maybe your name, where you go to school, etc.)
4. Assess their technology needs:
 - a. What kind of device are they working with?
 - i. Apple, Android, Other
 - ii. Tablet, Laptop, Computer, Other
 - b. What do they already have/know?
 - i. Do they have Zoom downloaded?
 - ii. Do they know what Zoom is?

Zoom Protocol

Downloading Zoom By Device

- For tablets and smartphones, you will need to walk them through how to download the “Zoom Cloud Meetings” app on their device from their app stores
- It is usually easier to send them a link that takes them directly to the download page than directing them to the app store. Here are the links that you can send directly to their device through Google Voice messaging
 - **Zoom App Download Link for Apple devices app store:**
<https://apps.apple.com/us/app/zoom-cloud-meetings/id546505307>
 - **Zoom App Download Link for Android devices app store:**
https://play.google.com/store/apps/details?id=us.zoom.videomeetings&hl=en_US
- **Laptop/Computer for Windows and Mac** are a little more complicated, read the instructions here on the Zoom support website
<https://support.zoom.us/hc/en-us/articles/201362033-Getting-Started-on-Windows-and-Mac>

Practicing Zoom Calls with Your Match

- You will need to practice with your match as many times as they need for them to feel comfortable! Additionally, it may be helpful to let them know that taking notes will help them remember later, and that you are there for as long as they need to feel comfortable.
- Make sure you have Zoom downloaded and are signed into your school account



- Schedule a new meeting through your account (using the Zoom protocol located [here](#))
 - **IF THEY ARE USING THE PHONE YOU ARE CALLING ON TO RUN THEIR ZOOM, YOU MUST HANG UP THE PHONE IN ORDER FOR THE AUDIO TO WORK!**
- Walk them through connecting video and audio, and you may need to help them get to their settings on their phone in order to “give permission” to the Zoom app

Overall Important Notes

- **THIS IS NOT A COOKIE-CUTTER EXACT PROTOCOL!** *A lot of this you will have to be flexible, and problem-solve!!* Not being with someone and trying to set up technology can be very difficult, but we know you can do it :)
- Ask them “what do you see exactly” often! It can help you get a sense of where they are and how they may be lost
- Make sure to use very explicit language; they may not understand “Open the app”, but they might understand “Lightly tap on the light blue square on your screen”
- Be patient! Walking through technology may be extremely scary and frustrating for your match, and patience is super important in having a productive initial tech call.