

Supplemental digital content for Rose CC, Haas MRC, Yilmaz Y, et al. ALiEM Connect: Large-scale, interactive virtual residency programming in response to COVID-19. Acad Med.

Supplemental Digital Appendix 3

Technical Tips and Best Practices for a Large-Scale, Interactive Virtual Conference

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Technical tips and best practices for a large-scale, interactive virtual conference

Backchannel Communications Platform (e.g. Slack®)

General Recommendations

- Create a Slack workspace via [Slack.com](https://slack.com) with a title related to the event.
- Provide detailed instructions to users with regard to signing up for an account, accessing Slack via the web URL, and downloading the desktop and mobile applications.
- Create separate channels for different purposes, while avoiding overwhelming those new to the Slack platform.
 - #announcements: include professionalism “ground rules” within this channel and use this space for announcements to the group.
 - #handouts-resources: upload files and paste links to supplementary educational resources related to the content covered.
- Provide users with general tips for Slack use including how to respond to messages within a channel, direct messaging (DM), emoji use, threads, sharing outside content, and suggested decorum/professionalism.
 - Post these “rules of engagement” in the #announcements channel.
- Allow unique programs or groups to create their own channels for internal communication.
- Create a “private” channel for event organizers to communicate with each other in real-time in order to coordinate the event behind the scenes and troubleshoot any issues that arise.
- Create a channel for each event speaker with the title #event-chat-(Speaker Name or Topic).
- If hosting multiple events within the same workspace, “archive” completed event channels prior to the start of the new event.

For Event Moderators

- Monitor the above Slack channels.
- Engage with residents to keep the conversation flowing. It may be helpful to send questions ahead of time to faculty in each institution.
- Share relevant applicable links to supplement discussions.
 - Use emojis and “likes” (e.g. thumbs up emoji, follow up questions, etc.) to promote discussions. Highlight this in the main room to further engage the audience and allow for immediate feedback from speakers.
 - Monitor for questions with many “likes” so that they may be raised to the speaker.
- In the case of a lull, consider sharing a thought, question, and/or pearl to “break the ice” and spark conversation.
- Remind participants to move to the appropriate speaker channel when applicable.
 - Monitor content in all channels, with specific attention to questions or comments about technical issues.
 - Provide clear rules with regards to “contests,” such as where to send answers (e.g. DM to speaker, directly on channel, etc.)
- Consider having a frequently asked questions (FAQ) channel for new Slack users.
- Provide speakers with access to their particular Slack channels to allow them to answer lingering questions following the live presentation.

Video Conferencing Platform (e.g. Zoom™)

General Recommendations

- Provide communication regarding best practices to all hosts, moderators and speakers:
 - Download and use the Zoom App instead of the web browser version.
 - Ensure strong internet connection.
 - Optimize video communication.
 - Ensure adequate front-lighting.
 - Avoid placing the camera in spots with glare or back lighting.
 - Keep the camera above or near eye level.
 - Use headphones and a microphone instead of the computer or external speakers in order to prevent reverb and other sound issues.
 - Close all other applications on the computer to minimize slowing of processor, crashing or sharing of the wrong window.
 - Turn off alerts to prevent pop-ups during the conference.
 - Mute your microphone when not speaking.

For Event Hosts

Prevent unwanted, interruptive guests (e.g. “zoom-bombing”) by following these suggestions:

- Consider requiring conference registration.
- Set all participants to audio mute upon entry.
- Enable the Waiting Room for your meeting.
- Do not use a personal meeting ID.
- Manage who can share screens with permissions.
- Enable password protection for users.
- Avoid allowing “Join Before Host”

Set all participants to audio mute upon entry.

For Event Hosts on Streaming the Conference:

Check Zoom settings to enable Live Stream:

- Select your preferred livestream service (YouTube, Facebook, etc.).
- Choose appropriate streaming settings.
 - If you would like the audience to view in near real-time, choose the lowest latency setting for your stream.
 - If you would like to prevent live commentary on the streaming service, disable comments as necessary.

Provide relevant permissions to hosts, speakers and moderators:

- Select “Manage Participants.”
- Hover over the participant’s name and select “Make Co-Host.”
- Switch from *Active Speaker* mode to *Gallery* mode when you would like to view all participants.
- Hide participants who do NOT have video enabled to save screen space.
- To play music or audio from your computer during a presentation, select “share computer sound” when sharing your screen
- Create a document for logistics, including speaker credentials in order to facilitate smooth transitions and personalized introductions for invited guests.

Stay on time:

- Use the chat function or a parallel communication pathway to remind speakers of time limits.
- Consider setting a timer or assigning a dedicated timekeeper to notify speakers of their limits.

Video Conferencing Platform (Continued)

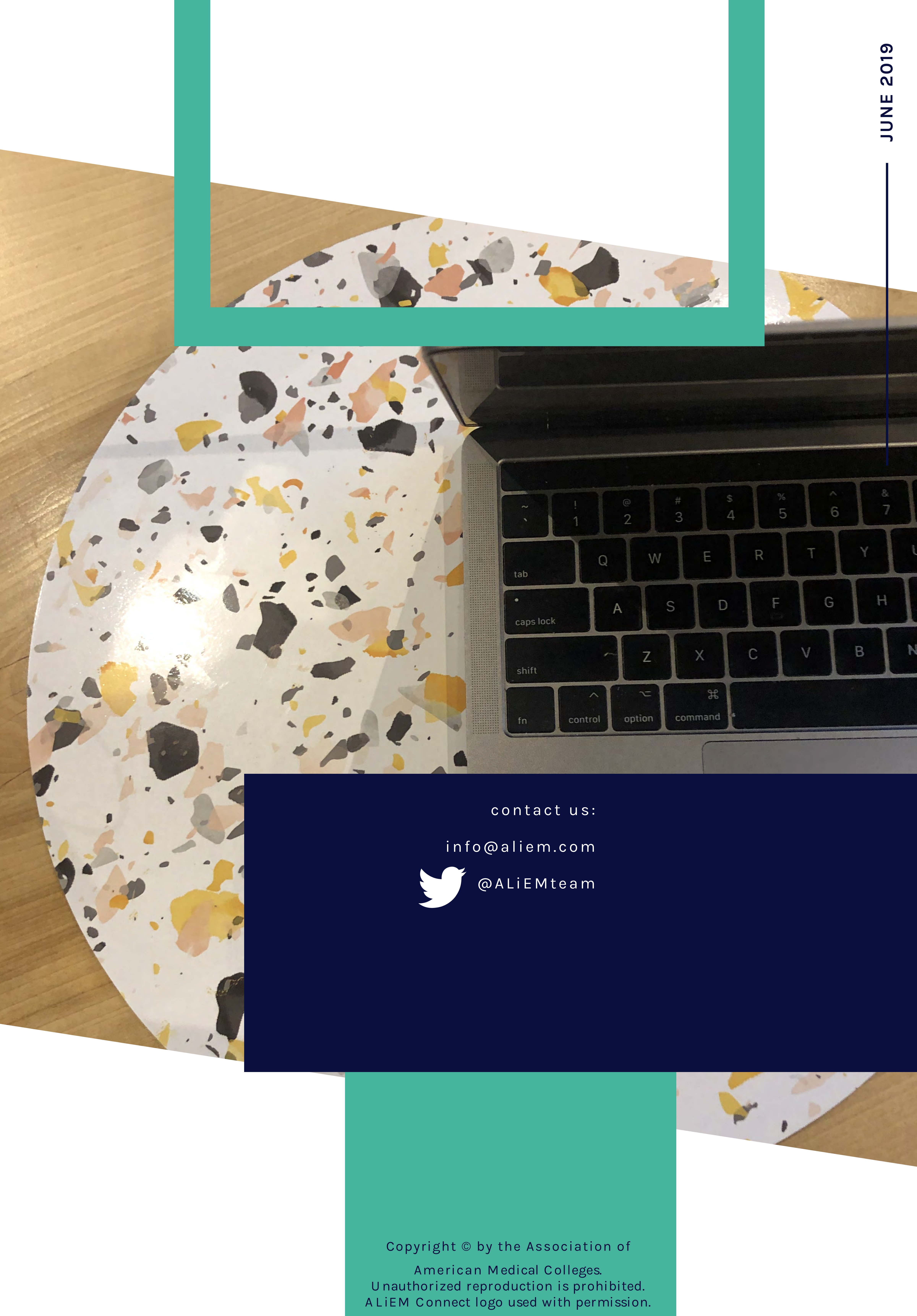
Recommendations for event moderators:

- Make sure to have “Host” capability enabled in order to take over control if a speaker has technical issues and assign the next speaker.
 - This also allows event moderators to quickly eject disruptive participants if the above precautions fail.
- Mute all Zoom participants other than the speaker during their session. This means you have to actively monitor the participant list and look for people who might have unmuted themselves.
- Consider renaming or adding special characters to distinguish participants, speakers and moderators for ease of identification in large conferences.
- Maintain a running list of questions to ask in the Zoom Chat for future reference.
 - The chat does NOT show up on the live stream.
- Present audience questions to the host in Zoom in a systematic fashion:
 - Add an asterisk or some other symbol to highlight popular questions.
 - Highlight questions coming from Slack within the rest of the Zoom chat by starting with a particular key, like “Q:...”
 - Develop a set of stock questions in advance for filler if no questions generated on Slack channel.



Recommendations for speakers:

- If planning to share slides, make sure you have “Host” ability.
- Save a readily-accessible backup PDF copy of slides in case Powerpoint/Keynote or browser application crashes.
 - Consider using Google Slides for ease of transfer to another host to minimize disruptions.
- Confirm who will alert you to questions raised by participants to avoid having to read through comments and questions while speaking.
- Clarify at the beginning your preference to answer questions in the midst of the talk or immediately after.



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