

Best Practices for Hosting Successful Webex Meetings

Create a Good Setting for Your Meeting

- **Find a Quiet Space:** Like any meeting, extraneous noises can be distracting and create an unproductive environment. Choose a location where there is no foot traffic, coworkers talking, or other distracting noises. A conference room or office where you can close the door is your best option.
 - **Tip: Don't eat food during your meeting. The sound of your food and all the wrappings will be heard by and distracting to everyone.**
- **Choose a Well-Lit Area:** As with audio, what people see can be helpful or distracting. Choose an area that is well lit so others attending can see you clearly.
- **Choose a Suitable Background:** Look at your camera image and pay attention to what you see in the background behind you. If you are able, sit in front of something decorative, like a bookcase or plants or a colorful wall. Place your web camera at eye level, or adjust your laptop camera, so that the ceiling is not your background. Looking straight ahead will feel more natural to your viewers than looking down the whole time.
- **Use a Good Headset or Echo Canceling Speakerphone:** Using a headset with a built-in microphone will help with you hearing and being heard clearly. If you prefer a desktop microphone, an echo canceling speakerphone will prevent feedback when multiple people are talking.
 - **Tip: Always keep your mic muted when you aren't speaking to reduce random background noises.**

Before Starting Your Meeting

- **Test Your Audio:** After selecting your audio, take time to test your audio before you join the meeting and make any needed adjustments. Most software solutions make it easy for you to make sure you are both sending and receiving audio at proper levels.
- **Turn Your Camera On:** At least half of all communication is nonverbal. Our supported technology includes a robust video connection that will add considerable value to your participation in the meeting. You will have a greater presence and your contributions will be better understood by the other participants.

- **If You're Joining Someone Else's Meeting, Use the Webex App to Join:** Although most meetings include a call-in option, using the conferencing app will help you get the most out of the meeting you are joining. Webex provides a download app for whatever device with which you are joining, even your mobile devices. This will allow you to turn on your camera, see the other participants and shared screen, and provide better audio quality as well.
- **Become Familiar with the System:** The best way to understand a technology is to use it. You can find lots of how-to resources on our website at help.med.unc.edu/webex. It's also a good idea to schedule test calls to try out the key features of the product. Don't forget to sign up for one of the Webex clinics that ATS will host throughout the year.

Meeting Etiquette

- **If You Can't Understand Someone, Tell Them:** If someone is speaking and they are unintelligible or simply too quiet, let them know. They are likely unaware of how they sound and may be able to easily adjust their audio to a proper level or engage tech support.
- **Limit the Number of Conversations at One Time:** When multiple conversations happen during a meeting, it's hard to decipher anything being said, and the meeting becomes unproductive. This is especially true if the multiple conversations are happening locally, and the remote participants can't understand a word. Be mindful of the fact that these participants are physically removed from the conversation and take extra steps to make sure they can understand and participate.
- **Wait an Extra Second to Allow Remote Participants More Time to Speak:** There is a natural delay between local and remote sites, and it is often difficult to know when someone has finished a thought. This is exacerbated when there are no visual cues to pick up on. It helps to be aware of this common issue and give your remote participants an extra moment to make sure they have finished their thought.

When Recording

- **Let Everyone Know You're Recording:** This is not only a courtesy, but it also makes everyone aware, so that no one will say something they would not want recorded. This will also reduce the risk of someone sharing potential sensitive information, including patient information, that should not be recorded and shared.
- **You're in Control of Your Recording:** You can Start, Pause, and Stop your recording when you choose. After processing, your recording is stored in your Webex account for you to control. You can share the link with whomever you choose and require a password if desired.
 - **Tip: Recordings cannot be downloaded, but they can be transferred to another Webex user's account if needed.**

When Including Protected Health Information (PHI) in a Conference

Patient protected health information (PHI) can be included in School of Medicine Webex conferences. However, HIPAA guidelines and federal law still apply. The following are general best practices to consider. Please refer to our [Conferencing Policies](#) page for more information.

- **Share Only with People Who Have Permission:** Make sure all meeting attendees with whom you are sharing have permission to view the patient information.
- **Consent Forms:** Make sure you have a signed patient consent allowing you to share their information. Also, be aware of any limitations of their consent.
- **Limit Your Data:** This is for the patient's, and your own, protection. Only include the specific patient information necessary for your meeting.
- **Identifier Awareness:** Be aware of any identifying images or information you are sharing in your meetings.
 - **Tip: If you use a generic image you found on the internet (e.g. a person's face), be sure to cite the source in your presentation.**
- **Video Recording and Sharing:** Make sure you have patient permission to record and share the recording with others.
 - **Tip: Require a password for viewing. This will also help prevent the recording from being available publicly if the link is forwarded.**

Need More Help?

- Whether you are in a meeting, having technical issues, or just want more training, we are here to help. Please contact us at conferencing@med.unc.edu, and we'll make sure to answer all of your questions and help in any way.