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| Overview | This resource is intended to inform State Health Insurance Assistance Programs (SHIP), Medicare Improvements for Patients and Providers Act (MIPPA), and Senior Medicare Patrol (SMP) grantees on how to help prepare for and present virtual events hosted by (name of agency).Prior to using it, review and revise text in yellow highlights to meet the needs of your program.  |  |

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| Event Host Contact Information | The host/facilitator is (name, email address, phone number).  |

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| Questions to Consider | 1. Do we have permission to record and post the event?
2. Do we have permission to record the presentation only, or also the Q&A?
3. Which documents will be shared during the event: PPT, handouts, etc.?
4. Do we have your permission to post/share these documents, (e.g. on our website / to our email list), and if so, in what format: PPT file or PDF file?
5. Have all documents been cleared for copyright and licensing considerations?
6. What kind of technology will be needed during the event? *Examples: sharing desktop to demonstrate a website, playing audio or video clips, asking review questions, using video cameras, etc.*
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| Preparing for the Event | * Work with (event coordinator/hosting agency) to schedule the event name, agenda, and date and time. Please plan to join the event at least 15-20 minutes early.
* Work with (event coordinator/hosting agency) to schedule a practice walkthrough, described below. A walkthrough is typically held 1 day to 1 week prior to the event.
* Prior to the walkthrough, provide (event coordinator/hosting agency) with any PowerPoint (PPT) presentation(s), handout(s), and/or other files.
* When developing PPTs, consider the “5 by 5” rule: maximum of 5 bullets per slide, 5 words per bullet. ***Tip: Add interaction to make your presentation more engaging.*** *(Update to explain interaction options for your software program, e.g.: allows for yes/no questions, polling questions, and typed responses to open-ended questions.)*
* Provide a brief, 3 – 5 sentence biography so that the host can introduce each presenter at the beginning of the event.
* Attend the walkthrough, described below.
* Attend the event, as described on page 2.
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| The Walkthrough | * Review the questions listed above and finalize materials as needed.
* Practice the technology that will be used for the event using the same phone and computer setup that will be used during the actual event. For example, the presenter typically advances their own PPT slides.
* Review and confirm the Q&A session procedures outlined on page 2.
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| Joining the Event | * Please join the event 15-20 minutes early.
* If using a camera, ensure your environment and background is presentable and free of distractions (see etiquette checklist).
* Connect to the web session using a high-speed network connection.
	+ - (Use the panelist link provided by the meeting host, in your Outlook calendar or by email.
		- Follow the prompts that appear on your screen to join the web conference first, then the audio conference.
		- If you encounter technical issues when joining, dial in directly to the audio conference using the information provided in the email or meeting request, OR call for assistance at: ###-###-####.)
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| Audio Tips | * Connect from a quiet area with little or no background noise.
* When dialing in to the conference call, use a land line, if possible, not a cell phone. Mute other nearby phones to avoid background noise.
* If using a conference phone, be aware that all noises in the room carry over the phone line.
* Avoid rustling papers, side conversations and movement in the room, and avoid moving the phone during the call.
* Mute your line when you are not talking, or if you must cough or sneeze.
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| Presentation Tips | * When speaking, speak slowly. Avoid “um” and other filler words. Also avoid silence (if waiting for a shared website to load, or during Q&A).
* Use the arrows to advance the PPT or go directly to a specific slide.
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| Desktop Sharing Tips | * Avoid desktop clutter and inappropriate background pictures and email pop-up messages. ***Tip: Close out of your email program prior to sharing.***
* Explain each click before making it, so participants can follow along.
* When demonstrating a website or computer system, provide a brief overview of each page before explaining details in any one area.
* Avoid any unnecessary mouse movements.
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| Q&A Session Procedures |  * (Questions are typically held until the end of the event, to ensure that all material is presented in the timeframe allowed.
* All participants’ lines are muted until the Q&A session. During Q&A, participants use the “raise hand” feature to ask a question; then the host un-mutes their line.
* Participants are encouraged to ask questions over the phone instead of using the chat feature.)
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| Post-Conference | Immediately following the event, the host may hold a post-conference with presenters to discuss the event and wrap up final details. Wait for the prompt by the host that the post-conference conversation can begin.  |

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