

Sample Plan

Hardware & Device Controls

One of the easiest ways to teach someone about the physical aspects of their device (especially if it is not the same as yours) is by searching for an image of their device brand and model. Yes, this takes some multitasking on your part. Perhaps, if you know the type of device and brand, consider searching for it before you make the call, so it is ready on your screen for reference.

Power/Sleep Button

Learners may be starting with a device already powered on, so this may not be relevant right away. However, if unexplained errors occur, you may have to ask the Learner to power the device down and power it back on.

For phones and tablets

Identify the difference between one firm push versus a long push and hold. Sleep versus powered off. Learners may think because the screen is off, it is powered off.

Some devices require an additional button to the power button to be pushed and held to power on/off.

For computers

the power button should be pushed once to power on, and powering off should be done through an onscreen process, such as navigating to the Start/Windows menu or Apple menu.

Home Button

For phones and tablets

Home buttons may be a physical button or a touch gesture, such as a swipe motion on the screen. Advise them how to appropriately interact with the home button/gesture as it will be commonly used. For example, is it a single quick firm or light push? Maybe learners occasionally use this button wrong, such as pushing and holding and activating something they did not want.

Camera, Speakers & Microphone

Attempt to locate these on their device and caution them not to have anything covering them or hold the device so they are not blocked, as it will affect the Zoom video call. Possibly their devices they have a protective case that does not fit their device or tape covering a camera.

Volume Control

Have them find the volume control and turn the volume up to a medium or loud level. Depending on the device, they may have physical buttons on the outside, one for volume up and one for volume down, or one long button, and by pressing the different sides, they can achieve the same thing. Or maybe there is a key on their keyboard. If not, help them find the volume control button, typically the symbol of a speaker. Also, keep in mind, how will they know when they have turned the volume up? Does a visual appear onscreen to indicate the increase?

Orientation

Phone and tablet

Users may have a different onscreen option if they hold their device horizontally/landscape versus vertically/portrait.

If they describe the screen orientation to keep flipping on them, support them to lock the direction that best suits them.

Tip: Viewing email apps in landscape allow for more screen options and more straightforward navigation. The landscape will also increase keyboard size.

Multi-touch gestures

Without being in the same space as the learner, it isn't easy to know if they are physically interacting with their device correctly and efficiently. For example, they could be initiating something to appear onscreen that could cause confusion or lead them to something unexpected. When you ask them to engage with something on their screen, consider using the language below and describe how they should be doing it.

Phone and tablet

Have users "tap" on what you need them to select with one finger or a stylus pen (a pen with a soft rubber tip on the end, *not an eraser*), have users "tap" on what you need them to select. Stick with the term "tap" throughout your tutoring sessions with them.

- "Tap" is to select- touch one finger lightly on the screen and release quickly
- "Tap/Touch and hold" - touch and hold something on the screen to perform other actions with it
- "Swipe" - move a finger across a screen quickly

Computers

With computers, it is always best to ask the Learner to "Click" or select something. Or stick with one term they are familiar with and continue with it while you tutor them.

Mouse

- "Click" is to select – most times

Trackpad

- "Push or press" is to select – most times, a firm push near the bottom left corner of the trackpad will work. There are many variations on how a trackpad can operate. As a Tech Tutor, you may need familiarity with the device or conduct a Google Search to learn how it works
- Using one finger, moving it around the trackpad will move your cursor (arrow) onscreen

Wi-Fi & Settings

The device needs to have access to the Internet. You may need to confirm this with the Learner as they may not be familiar with Wi-Fi and how it works. Think, they could use their device every once in a while and use the Internet, but someone else connected it for them, and if you asked them, they might say no. What questions can you ask to confirm if their device is connected to the Internet? Is there something from their screen that will identify connection? Do they use it for anything Internet-based? You may have to provide some internet-based examples. You may have to help them navigate the settings to reconnect to their home Wi-Fi. As you are helping them, there may be a few other settings you can help them change, so they have the best experience interacting with their device. Perhaps, increasing brightness or increasing text and display size.

Phone and tablet

Status bars can display a Wi-Fi symbol to indicate the device is connected to the internet. Most devices' status bars run along the top of the screen.

Accessing the devices Control Centre can provide quick access to commonly used settings, such as display brightness. In most cases, users can swipe downward on their screen from the top centre or top corner to display the Control Centre.

Computers

Computers will have a taskbar running along one of the sides of the screen that most commonly displays the device's status symbols. In one of the corners, users may locate a Wi-Fi symbol and other valuable controls such as display brightness and volume control.

Email

Email accounts can be accessed in several ways. If they are experienced with navigating to their email, have them do so as they usually would. If they are unfamiliar with email, start by building on what they might have done in the past to access it. Next, have them describe what they are selecting to get to it. You may have to be very strong with your descriptive language at this stage. Perhaps their email account is already signed into a program/app that is the native email software on their device, or maybe they use the brand of an email-specific app such as GMAIL, Yahoo, or Outlook. You may have to conduct a process of elimination to help them find access to it, best to start by knowing their email provider. How would you describe the app icon and where to find it if it is not on the home screen or desktop/taskbar? Most email apps have a symbol of an envelope.

Once they have access to their email account, if they are unfamiliar with the interface and common emailing tasks, go through some of the basics such as:

- Viewing the inbox, is it running along the left side of the screen or new the middle? How will you describe what it looks like?
- Selecting a message and viewing the full message. Does it take over the screen, or does the message that has been selected share the screen with the inbox?
- Replying to an email
- Deleting an email
- Navigating to the different mailboxes, such as 'Junk' or 'Spam' in case important messages are being sent there. You may have to help them identify the sender as 'Not junk/spam'
- Receiving an email with a hyperlink. What visually sets the hyperlink aside from regular text. How do they know what to select?

Install Zoom via email Hyperlink

Upon sending the Zoom invitation link to the Learner, if The Zoom app has not been previously installed on the device (this is expected), you need to take the Learner through the one-time install process. To review these steps and how to navigate through them on different types of devices find the downloadable PDFs included at [Phase 7 of the Tech Tutor Process](#) of the techtutorhanbook.ca website.

Reminder, it is crucial for Learners to know how to join a Zoom meeting via a hyperlink, rather than opening the Zoom app and manually entering the Meeting ID and Passcode. Sending a link is how the Organizations will be asking their clients to join virtual programs.

Zoom Meeting

First Zoom Meeting

The first time a device connects to a Zoom meeting, a few prompts may appear on the screen. For example, the Zoom program may need permission to connect to the microphone and camera of the device. Anticipate these to help the Learner select the appropriate option, and inform them why they are choosing "Allow," "OK/Yes,"

or "Permit." If they dismiss these prompts or "Deny" them, you will need to assist the Learner in accessing the device's settings after learning it was not connected properly.

Zoom Controls

During the first Zoom meeting, Learners should learn how to use the basic Zoom features and become comfortable with them. Anticipate giving a tour of the zoom controls that they see onscreen. Be cautious that the controls are not in the same place on your screen as they are for the learner, depending on what device they are using. Also, be aware that if they are on a phone/tablet, the controls may disappear from the screen when the screen is not touched. Advise those Learners to tap on the screen to bring them back up, and expect they will disappear once again if nothing is selected.

Some of the Zoom features, such as Reactions/ Chat, may be a little challenging for some Learners, gauge the strength of the learner and their interest in learning these features. It may be too much for some.

Mute/unmute

Start/stop video

Reactions

Chat

Views (Speaker/Gallery)

Leave Meeting

Practice Zoom Call

Starting from sending an email with a Zoom invitation, begin the process of having the Learner join a Zoom meeting over again. This second call will resemble a typical virtual program in the future. This allows the Learners to increase their confidence as they encounter similarities, and it will become familiar to them. On this second call, perhaps run through the Zoom controls once more.