



Appendix 5.10 - Electronic Meeting Procedures Approved - August 30, 2021

The CSBA approves the Electronic Meeting System (EMS) for conducting Electronic (E-meetings/Virtual) meetings. This document provides basic guidance on how to use the approved platform to improve the experience for all.

Meeting Set-Up

- The CSBA Executive Director (Host) will manage the invitations and parameters for all meetings/events.
- The host will establish default settings to indicate that the meeting/event is private.
- The host will set up, if possible, the Waiting Room feature in order to control who can join the meeting. It is recommended that all participants be placed into a Waiting Room prior to the host allowing entrance into the meeting/event.
- The host can also allow screen sharing by participants. Options are available by clicking on the up arrow by the Share Screen icon. The host can select the “host only” setting to prevent others from sharing their screens. If the host determines that screen sharing by participants is needed, sharing by “one participant at a time” should be selected. The host should remind participants not to share other sensitive information during the meeting inadvertently.
- The hosts should always inform attendees at the start of the meeting or in advance of the meeting if they are going to record a meeting. Generally, you should not record a meeting if the same meeting would not be recorded if it occurred in person.
- If a meeting/event is to be recorded, participants should be told in advance and they can choose whether to attend or to attend without speaking or video.
- Other steps may be taken as described below in **Managing Participants**.

Prior to Starting an Electronic Meeting:

- 5 to 10 minutes before the scheduled time (before Attendees join), the host should check the event's security settings and make sure the Attendees' settings are set how the host wants. The host can change the settings at any time during the event, but it is best to confirm your settings before Attendees join.

Managing Participants

- In order to prevent unwanted participants, the host may wish to follow these basic tips:
 - Don't post meeting IDs in public forums.

- o Don't reuse meeting access codes. You should generate a new access code for each meeting.
- o Monitor participant list for unwanted attendees.
- o The meeting host should, if platform allows:
 - Limit attendance to invitees using the email listed in the meeting invite.
 - Set up a secure entry through a Waiting Room.
 - Protect meeting access by having a meeting password.
 - Lock the meeting once the meeting begins.
 - Mute participants who are not presenting.
 - Disable private chat, if desired.