

**Remote hearings and COVID-19**  
**Response to paragraph 8.3 – APPENDIX 1**  
**30 March 2020**

**FLBA**

**Video Conferencing / Remote Hearings**

**Instructions for use of Video Conferencing Platforms**

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**Instructions for use of Skype for Business**

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**Introduction**

1. Skype for Business (‘SfB’) is an online video conferencing platform that can be used to hold conferences, meetings, and remote court hearings. It is produced by Microsoft and was formerly known as ‘Lync’.
2. Microsoft has been phasing out SfB since 2017, replacing it with Microsoft Teams<sup>1</sup>. Thankfully, there is some cross-compatibility between the two platforms.
3. SfB is available on all computers and mobile devices operating on Apple, Windows, or Android operating systems. There is a significant difference between the appearance and functionality of SfB between devices and operating systems to a far greater extent than is the case in Teams.

**Installation**

4. As Microsoft are seeking to replace SfB with Teams, attempts to download the app via the Microsoft website are likely to be met with information regarding Teams as a replacement for SfB and persistence may be required.
5. SfB can currently be downloaded at: <https://products.office.com/en-gb/skype-for-business/download-app>
6. If you have an existing 365 account, SfB can be downloaded from the ‘Apps and devices’ tab under ‘My account’.
7. SfB is available on iOS and Android as downloadable apps.

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<sup>1</sup> If you have not upgraded your software since circa January 2018, you may be able to activate a hitherto dormant account for Skype for Business you did not know you had. Otherwise, Microsoft won’t let you open a new account for Skype for Business (even if you ask nicely).

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8. It is highly recommended that you have SfB installed on a desktop or laptop.  
Using SfB on your mobile phone:
  - a. Makes it more difficult to use some of the features available on SfB (such as only being able to see one screen at a time); and
  - b. Is not appropriate for a professional in a remote court hearing, particularly if you are walking/moving around, because of the user experience for everyone else.
9. If you must use your phone, it is highly recommended you have it resting on a table in a stable manner. It is advised to use a phone mount.
10. Whilst an iPad provides for a reasonable viewing screen the functionality is, as set out below, limited to that of a mobile phone (this is not the case in Teams).

#### **Guidance from Microsoft**

11. This document aims to provide all the necessary skills to be able to use SfB for remote working for legal professionals. However, Microsoft provides help/guidance in the following ways:
  - a. SfB help and learning can be accessed at <https://support.office.com/en-gb/skype-for-business>;
  - b. On a Mac with Skype for Business open, select 'Help' from the top menu bar and then 'Skype for Business Help' to be directed to the Microsoft support pages; and
  - c. On a windows device, select help within the SfB app press the down arrow next to the 'cog' icon in the top right corner, select 'Help' and then 'Skype for Business Help'.

#### **Setting up a Meeting**

12. The functions for planning advanced meetings from within SfB appear to be phased out on many devices. An ad hoc meeting can be arranged via the SfB app using the 'meet now' feature.

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13. A scheduled meeting can be set up in the following way using the ‘Calendar’ within ‘Outlook’. To set up a meeting:
- a. Select ‘Calendar’;
  - b. Select ‘New event’;
  - c. In the box entitled ‘Add title’, give a name to the meeting;
  - d. In ‘Add required attendees’ enter the email addresses of those you wish to invite;
  - e. Check to ensure the date and time of the meeting is accurate;
  - f. Select ‘Add Online meeting’ and select ‘Skype meeting’;
  - g. (If you want) you can put in any further details for this meeting; and
  - h. Click ‘Send’ (until email addresses are added this option shows as ‘save’).
14. The invite will go to the invitees via email. If they accept, you will get confirmation they have accepted in your email. The meeting will appear in your calendar and device calendar (if your device calendar is linked to your Microsoft account). If an invitee accepts the invitation, it will also appear in their Teams/SfB calendar (if they have either) and their device calendar (whether or not they have Teams or SfB).
15. Additionally, you can invite participants to a meeting in the following ways:
- a. During a meeting, can access the ‘show participants’ option during in-meeting options<sup>2</sup> and either:
    - i. Type the name of the participant in the ‘invite someone’ and select their name (this may only work within your contacts or organisation); or
    - ii. You can forward the email inviting you to a meeting or the join meeting link in the calendar so that they can join via the link.

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<sup>2</sup> Please see below

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#### **Joining a meeting**

16. Once you accept an invite received in your email, the email will go straight to your trash/deleted mailbox and the meeting will be scheduled into your calendar.
  
17. To join a meeting:
  - i. Open your device calendar;
  - ii. Find the meeting and look at the notes for that meeting; and
  - iii. Click on the link entitled ‘Join meeting’;
  - iv. Select your audio and video settings (i.e. video/microphone on or off), click ‘Join now’.
  
18. If you have been sent a ‘join now’ link forwarded by another participant, you can join by selecting the link.

#### **In-Meeting Functions**

19. As the in-meeting functionality varies considerably from device to device, the following section attempts to describe only the central functions. More detailed assistance on individual devices can be found via the support pages set out above.
  
20. If you touch the middle of the screen (if on a tablet) or if you click on the middle of the screen (if on a laptop/computer), an options bar will appear that gives you the following options:
  - a. Video on/off;
  - b. Microphone on/off;
  - c. ‘Share’<sup>3</sup>; and
  - d. Hang up.

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<sup>3</sup> Dealt with separately

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21. On Macs the ‘More options’ tab (marked by ‘...’) also appears in the centre row. On Windows devices the same symbol appears in the bottom right of the screen. On windows devices this accesses the record function. That function is not available on Macs and, it is understood, is only available to those who are in the same organisation as the meeting organiser. Attention is drawn to the Remote Access Family Court paper regarding the restrictions on recording hearings. No recording should be made other than as directed by the Court

22. On Macs there are a further series of 4 icons at the top right of the screen during a call. The most relevant of these are:

- i. Device settings (a ‘cog’ icon) which brings up audio and video settings;
- ii. Show Conversation: This provides a ‘chat’ facility during a meeting. Again, participants should be aware that this can be viewed by all participants to a meeting, and
- iii. participant’s tab which lists all parties to the meeting, shows their microphone status. The organiser has the option to:
  - a. Remove people from the meeting;
  - b. Mute everyone in the meeting<sup>4</sup>;
  - c. Invite others into the meeting<sup>5</sup>.

23. On windows devices:

- a. The participants button is in the top left;
- b. The chat facility is in the bottom left;
- c. The audio settings can be accessed via the ‘devices’ button which is accessed via the call settings (a telephone with a cog) in the bottom right of the screen.

24. On a windows device you will see the live video feeds as a band across the middle of the page with the other participant icons below. On a windows device

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<sup>4</sup> This feature is available to everyone who is in the same organisation as the organiser.

<sup>5</sup> This appears to be limited to people in your organisation.

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(but not Mac or mobile device) you can ‘pin’ a feed to keep that video feed live on the screen. If your camera is on you will also see your own video feed.

25. If you are on a Mac, the last four people who have spoken will remain visible showing in quarters on the screen. At the bottom of the screen, you will see initials or profile photos (if they have one), showing you who else is in the meeting.

26. If you are using your phone or an iPad, you can only see the participant who is speaking (and yourself if you have your video on).

### **Multiple Rooms**

27. Rather than having one meeting to be used for pre-hearing conferences, advocates meetings as well as the hearing itself, it is preferable to set up multiple meetings that can run simultaneously. Follow the steps for ‘Setting up a Meeting’ and set up as many meetings as you need. Consider a setup as follows:

- a. Meeting for conference with client(s);
- b. Meeting for advocates;
- c. Hearing.

28. This ensures that only those people invited/intended for a particular meeting are able join and it avoids confusion if the meetings are clearly labelled (Hearing, advocates meeting, conference, etc.).

29. You cannot be in more than one meeting at any one time and if you join one of the other meetings whilst still in another meeting you will be shown as ‘on hold’ in the first meeting.

### **Sharing in a meeting**

30. There are a number of features through which you can share information.

31. If you wish to share a document with everyone at the meeting so they can download it:

- a. On a Mac:



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- i. Select the ‘more options’ feature in the meeting;
    - ii. In the ‘chat box’, select ‘add attachments’; and
    - iii. Select the document you wish to share<sup>6</sup>.
  - b. On a Windows device:
    - i. Select the ‘share’ button; and
    - ii. Select add attachment.
32. Alternatively, if you wanted to share something on your screen:
  - a. Select the ‘Share’ Feature in the in-meeting options;
  - b. Select the application you wish to share, for example:
    - i. PDF application you are using for your bundle;
    - ii. Video/Audio file that you want the meeting to see/hear; or
    - iii. Word Document such as position statement/skeleton.
  - c. If you are running a second screen you can choose to share that screen with the meeting.
  - d. To stop sharing, select ‘stop presentation’ at the top of the screen.
33. Whilst practice is recommended with all the functions it is particularly encouraged with this function to avoid the risk that you inadvertently share sensitive material with the meeting.

### **Guests – Litigants in person / Lay parties**

34. People who do not have Skype for Business can still accept meeting invitations when they receive an email.
35. They can join the meeting via their calendar.

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<sup>6</sup> There are additional apps such as Share Point that allow you to see and edit a document together, which might be useful for drafting orders or terms of agreement/disagreement for professionals. However, this falls outside the remit of this guide.

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36. When they try to join the meeting, they will be given two options:
- a. Join via the web; or
  - b. Download Microsoft SfB.
37. If they wish to join via the web, they will need a web browser other than Safari. Firefox or Chrome are recommended.
38. If they download the app they will not need to set up an account and can join as guests.
39. Please make sure litigants in person / Lay parties are online through Wi-Fi. Using video for lengthy meetings/hearings will use up a lot of mobile data.

**Additional note for Judges**

40. It is understood that SfB is currently available on the judicial laptops and can be accessed via the eJudiciary home page using the Outlook calendar.
41. Further guidance and support is available via the eJudiciary website including guidance on obtaining a dedicated SfB judicial email address.

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In behalf of FLBA Paperless Working and Technology Sub-Committee  
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**Video Conferencing / Remote Hearings by Zoom**

**Instructions for use of Zoom**

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Introduction

1. Zoom is an online video conferencing platform used already used by many at the Family Bar. It is an alternative to Skype for Business [SFB], Microsoft Teams and Lifesize. It has many more features than SFB but is simple and cheap to use. It is suitable for use when moving to a remote video platform for client conferences, advocates meetings and remote court hearings. It is authorised for use under the terms of the Remote Family Court Protocol but may not be accessible to Judges uses DOM1 MoJ laptops. It is secure and GDPR compliant.
2. Zoom can be used on Windows and Mac computers and on Apple, Windows and Android tablets and smart mobile phones.

How to Access Zoom

3. On your Apple phone or iPad go to the app store and search for ‘Zoom Cloud Meetings’. Download the app.
4. For your Android device go to google play app store and search for ‘Zoom cloud meetings’.
5. For all other devices, go to [www.zoom.us](http://www.zoom.us) or use your browser to search for ‘Zoom cloud meetings’ or ‘Zoom video conferencing’ and follow links to the Zoom.us website.

Cost

6. It costs nothing to join a Zoom meeting that has been organised by another person, but you do need to have the app downloaded if using the service on a tablet or mobile. There is also no limit on how long you can stay in a meeting organised by another person.
7. If using the cheapest version of the software, the ‘Basic’ version, you are limited to 40 mins participation in a multi-party meeting you have set-up and you can only yourself arrange 1 to 1 meetings - so using that version is likely to be inadequate for business purposes unless it is your intention not to arrange any meetings of your own. But if all you want is to join meetings set up by others, then the ‘Basic’ version will be fine.

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8. If you wish to purchase, we recommend that you purchase the ‘Pro’ version. If paid monthly, this costs £11.99 per month. That reduces to the equivalent of £9.99 a month if paid annually.
9. There are other more expensive versions (business and enterprise) but these are unlikely to be necessary for barristers. These more expensive versions are those likely to be necessary if purchased by chambers (rather than individual barristers) or by solicitors’ firms. We recommend that you purchase your own ‘Pro’ version so you have total flexibility and access. It is a small monthly cost that is a tax deductible business expense.

#### Setting-Up a Video Meeting / Hearing

10. You can arrange a video meeting / video hearing via the Zoom app or the Zoom website.

Zoom website

11. On the website, having joined and paid your fee, log-in to your account. You can fix an immediate meeting or you can schedule a meeting for a specific time and date.

(a) To fix an immediate meeting on the website, once on the Zoom home page:

- Hover over ‘HOST A MEETING’.
- Click on ‘with video on’.
- Click allow when asked “do you want this page to open Zoom.us”.
- Click “join with Computer Audio”.
- The video page with open and you will see your face (or whatever your webcam is pointing at).
- Click on ‘INVITE’ in the tool bar that appears under the video window.
- Click on contacts or email in the top of the menu box that appears
- [Contacts are your contacts that are recognised by Zoom.]
- Click on ‘email’ at the top of the menu window.
- Click on ‘default email’.
- A draft email will appear that you can then send to anyone you want to join your meeting.

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- Click on ‘COPY INVITATION’ at the bottom of the menu window. A link to your video meeting is then copy into your clipboard and you can paste it into emails, texts, social media messaging etc.
- (b) To schedule a meeting for a later time from the Zoom homepage:
- Click on ‘MY ACCOUNT’.
  - Click on ‘SCHEDULE A MEETING’.
  - In the ‘TOPIC’ text box insert name for your meeting.
  - In the ‘WHEN’ text boxes insert time and date.
  - Untick ‘recurring meeting’ and ‘registration required’ unless these apply.
  - Tick ‘generate automatically’ under ‘meeting ID’.
  - In the ‘MEETING PASSWORD’ section click require meeting password.
  - Under ‘VIDEO’, click on for both ‘host’ and ‘participant’.
  - Under ‘AUDIO’, click ‘TELEPHONE AND COMPUTER AUDIO’.
  - In ‘MEETING OPTIONS’ click those that apply. We suggest enabling ‘join before host’ or ‘waiting room’ (if waiting room is enabled, join before host will not work).
  - If the meeting is to be recorded (a remote court hearing), click on ‘RECORD THE MEETING’ and select ‘in the cloud’. Alternatively, you can start recording the meeting
  - If you want to nominate an additional host, insert email address in the ‘ALTERNATIVE HOST’ text box.
  - Click ‘SAVE’.
  - A summary of the meeting details with then appear
  - Click on ‘COPY THE INVITATION’ and send to all those to be invited.
  - HOWEVER, if you are concerned about the security of your meeting, you might want to delete the password information from the email and send it to the invitees in an alternative email or by a different method.
  - At the time for the meeting, click on the link to the meeting and insert the password.

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Zoom mobile App

12. On the mobile App, you can fix an immediate meeting or schedule a meeting for a specific time and date.

(a) To fix an immediate meeting in the app:

- Click on 'NEW MEETING'
- Click on 'START MEETING'.
- Click on 'USE INTERNET AUDIO'.
- To invite participants, click on 'PARTICIPANTS' in the menu below the video window.
- Click on 'INVITE' and select the invitation method you wish to use.
- You can click on 'MORE' to select additional meeting settings.

(b) To schedule a meeting for a later date and time:

- Click on 'SCHEDULE'.
- Insert date and time in relevant text boxes.
- Select 'REQUIRED MEETING PASSWORD'.
- Select 'HOST VIDEO ON'
- Select 'PARTICIPANT VIDEO ON'.
- Select 'ENABLE WAITING ROOM'.
- Click on 'ADVANCE OPTION'
- Select 'ALLOW JOIN BEFORE HOST' (if waiting room is enabled, join before host will not work).
- Select 'AUTOMATICALLY RECORD MEETING' if that is what is required. Recording can be activated once the meeting has commenced.
- Click 'DONE'.
- A meeting summary page will then appear.
- Click on 'INVITEES' and add the details of those invited to the meeting
- Click 'ADD' and the meeting will be added to your calendar

13. On the Macbook App, you can fix an immediate meeting or schedule a meeting for a specific time and date.

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(a) To fix and immediate meeting in the Macbook App:

- Click on 'NEW MEETING'.
- CLICK 'JOIN WITH COMPUTER AUDIO'.
- The video page will then appear
- Follow the steps set out in 11(a) above.

(b) To schedule a meeting for a later date and time:

- Click 'SCHEDULE'.
- Click on 'TOPIC' text box and insert name of meeting.
- Enter date and time of the meeting.
- Untick 'RECURRING MEETING'.
- Click 'GENERATE AUTOMATICALLY' in 'MEETING ID'
- Click 'REQUIRE MEETING PASSWORD'
- In 'VIDEO' Click 'HOST ON' and 'PARTICIPANTS ON'.
- in 'AUDIO' Click 'TELEPHONE AND COMPUTER AUDIO'
- Select the calendar in which you are saving you meeting.
- Click 'ADVANCED OPTIONS'.
- Click 'ENABLE WAITING ROOM'.
- Click 'ENABLE JOIN BEFORE HOST' (if waiting room is enabled, join before host will not work).
- Click 'MUTE PARTICIPANTS ON ENTRY' if this is to apply.
- Click on 'AUTOMATICALLY RECORD MEETING ON THE LOCAL COMPUTER' if you need to record the meeting BUT it is better to access Zoom via the website so the meeting is recorded to the cloud
- Click 'SCHEDULE'.
- The App home screen will then appear.
- Click on 'MORE' [the 3 dots icon] and select 'COPY INVITATION'.
- The link to the meeting will then copy to clip board to be pasted into email.



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#### Joining a Video Meeting / Hearing

14. If you have saved the meeting into your calendar, you will receive an alert to join the meeting.
15. On the Zoom home page:
  - Click on 'MY ACCOUNT'.
  - Click 'MEETINGS' in the 'PERSONAL' menu on the left side of the page.
  - Your meeting schedule will appear.
  - Click 'START' on the meeting you want to enter.
16. In the Zoom App on smart phones:
  - Click on 'MEETINGS' at the bottom of the page.
  - Your meeting schedule will appear.
  - Click 'START' on the meeting you want to enter.
17. In the Zoom App on Macbook:
  - On the home screen, your meetings schedule appears on the right side of the screen.
  - Click 'START' on the meeting you want to enter.
18. If you have received an email/text/Whatsapp link to a meeting, simply click on the link and you will be joined to your meeting.

#### In-Meeting Functions

19. The functions available to you within a meeting depend on whether you are the host of the meeting or a participant in the meeting.

#### Waiting Room

20. Waiting room is a feature that allows the Host to hold participants in a waiting area before bringing them into a meeting AND also allows the host to push participants out into the waiting during the meeting.
21. It may be that the Judge will want to speak to 'advocates only' so this feature can be used to move other participants into the waiting room.
22. It may be that a party is being disruptive. If so, the Host can move a disruptive party to the waiting room, a discussion on how to proceed can take place with

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the Judge and the advocate and client can then be moved by the host into a ‘breakout room’ [see below] before the main hearing recommences.

23. As is set out above, the ‘Waiting Room’ feature can be set in the ‘ADVANCE SETTINGS’ when scheduling a meeting.
24. Also, in your own account settings (if you have an account and will be hosting meetings) you should change your settings so they are ‘waiting room’ ready:
  - Click on ‘MY ACCOUNT’
  - In vertical menu on the left under ‘PERSONAL’ click on ‘SETTINGS’
  - Scroll down to ‘WAITING ROOM’
  - Click to enable
  - Click select ‘ALL PARTICIPANTS’
25. If you have more than one user on your account, take the following steps:
  - Click on ‘MY ACCOUNT’.
  - Click on ‘ACCOUNT SETTINGS’.
  - Scroll down to ‘WAITING ROOM’
  - Click to enable
  - Click to select ‘ALL PARTICIPANTS’
26. Also, in MY ACCOUNT, follow the steps set out in 23 above and enable “ALLOW HOST TO PUT ATTENDEE ON HOLD”.
27. If using the App for Macbook:
  - Click on your account ID at the top right corner.
  - Click on ‘SETTINGS’.
  - Click on ‘VIEW MORE SETTINGS’ as the bottom of the menu window.
  - You will be taken to the Zoom website.
  - Follow the steps set out at 22 and 23 above.
28. To admit participants to a meeting:
  - Enter the meeting room as the host.
  - Click on ‘MANAGE PARTICIPANTS’ in the menu at the bottom of the screen.

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- Click on ‘ADMIT ALL’ or click on ‘ADMIT’ for those you wish to allow entry,
29. To remove participants from a meeting and place them in the waiting room:
- Click on ‘MANAGE PARTICIPANTS’.
  - Click on ‘MORE’ next to the name of the participant.
  - Click on ‘PUT IN WAITING ROOM’.
30. To readmit a participant from the waiting room, follow steps at 26 above.

#### Breakout Rooms

31. Breakout rooms can be used to allow the Host to move advocates and clients/solicitors to a video conference separate from the main video hearing to enable instructions to be taken.
32. A period of time can be set prescribing how long that breakout room will be open or the Host can close the breakout room, giving those using it a timed count-down before the room closes and they are returned to the main hearing room.
33. Breakout rooms can also be used to allow advocates to speak with each other on issues that arise during the course of a hearing, allowing discussion and negotiation without the need for a separate video conference to be established and avoiding the need for advocates to use other resources such a mobile phone/Facetime/Whatsapp calls.
34. To establish a breakout room, the host must have her/his account settings to activate this feature:
- Click on ‘MY ACCOUNT’.
  - In the vertical menu on the left, under ‘PERSONAL’ click ‘SETTINGS’.
  - Scroll down to ‘IN MEETING (ADVANCED)’.
  - Find ‘BREAKOUT ROOM’ and click to enable.
  - Also select “Allow host to assign participants to breakout rooms when scheduling”.
  - Click ‘SAVE’

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35. If you have other users on your account, follow the steps set out in 34 above after:

- Click 'ADMIN'.
- Click 'ACCOUNT MANAGEMENT'.
- Click 'ACCOUNT SETTINGS'.

36. Only the Host can control access to breakout rooms during a meeting/hearing, or a co-host if a co-host has been assigned for the meeting. If you are the Host, you can access breakout rooms during a video meeting / remote hearing:

- Click on the 'BREAKOUT ROOMS' icon in the horizontal menu at the bottom of the screen.
- A pop-up window will appear.
- Select the number of break out rooms to be created.
- Click on 'AUTOMATICALLY' or 'MANUALLY' – the manual selection feature likely to be most appropriate so specific participants (advocate, legal rep, client) can be assigned to their own breakout rooms.
- If 'AUTOMATICALLY' is used, a further pop-up window will appear that allows the host to change the participants allocated to each breakout room.
- Click 'OPEN ALL ROOMS'
- A message is then sent to each participant allowing them to enter their allocated breakout room.

37. Once the breakout rooms are created and populated with their allocated participants, only the Host or co-host can hop between breakout rooms:

- In the pop-up window identifying the participants in each breakout room, click 'JOIN' in the room you wish to enter.
- To enter another room, Click 'JOIN' where indicated above that room.

38. To terminate breakout rooms:

- Click 'BROADCAST A MESSAGE TO ALL'.
- In text box type in message such as 'adjournment is over in 1 minute'.
- Click 'BROADCAST'.
- Click 'CLOSE ROOMS'.

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- The rooms will then close after the time prescribed in the settings.
39. The same breakout rooms can be re-opened:
- Open the BREAKOUT ROOMS pop-up window.
  - Click on ‘OPEN ALL ROOMS’ and the rooms will re-open.
40. To change the time settings for the breakout rooms:
- Open the BREAKOUT rooms pop-up window.
  - Click ‘OPTIONS’.
  - You can set a period of time when the breakout room will automatically close.
  - You can set the countdown for the period of time when the breakout room will close after the Host has clicked ‘CLOSE ROOMS’ [see 38 above].
41. To pre-assign participants into breakout rooms:
- Click ‘MY ACCOUNT’.
  - Click on ‘MEETINGS’ in the vertical menu on the left of the screen.
  - Click on the meeting to which you wish to allocate breakout rooms.
  - Click on ‘EDIT MEETING’.
  - Scroll down and click on ‘BREAK OUT ROOM PRE-ASSIGN’.
  - Click on ‘CREATE ROOMS’.
  - Add the details of the participants to the breakout rooms to be created.

#### Adding a Co-Host

42. It can be useful for the host to authorise a co-host for an open meeting, so the meeting can be managed even when the Host might have left. To add a co-host:
- Click on ‘MANAGE PARTICIPANTS’.
  - Hover over name of the participant who is going to be the co-host and click ‘MORE’.
  - Click ‘MAKE CO-HOST’.
  - The co-host will now have access to co-host controls.

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#### Sharing Screen Content with the Judge/Witness/Parties

43. In an advocates meeting, conference or remote court hearing, it is useful/essential to be able to share the content of your screen. A clear example is showing a page of the bundle to a witness or 2 the Judge.
44. With Zoom you can share a specific page from a selected file with other participants without sharing the whole image of your desktop – important as during an advocates meeting or remote hearing you are likely to have multiple windows open on your computer.
45. To share screen content:
  - Click on ‘SHARE SCREEN’.
  - Different options will appear in the pop-up window.
  - Select the individual application that is open on your computer that you wish to share, for example Adobe Acrobat Pro DC to share a page from the Court bundle (or whatever PDF software you are using to manage the ebundle).
  - Click on the application and that application (as it appears on your screen) is shared with all participants.
  - Click on ‘SHARE’.
46. You can use ‘SHARE SCREEN’ to play video and audio to the Judge/Witness/Parties but ensure that you have activated audio share:
  - Click ‘SHARE SCREEN’
  - Click on the application screen to be shared.
  - Click on ‘SHARE COMPUTER SOUND’ in the bottom right hand corner.
  - Click on ‘SHARE’.
47. To stop the share or pause the share or share some different:
  - In the horizontal menu, click ‘STOP SHARE’.
  - In the horizontal menu, click ‘PAUSE SHARE’.
  - In the horizontal menu, click, ‘NEW SHARE’

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#### Sending Private Text Messages

48. During the meeting you can send private messages to everyone or to selected other participants by using the ‘CHAT’ feature:

- Click on ‘CHAT’ in the horizontal menu.
- A ‘CHAT’ column will appear.
- Select the participant you wish to chat with and type message and the bottom of the column, or
- Select ‘EVERYONE’ and send your message.

#### Recording the Audio and/or Video of the Meeting / Hearing.

49. Zoom records both the audio and the video of the meeting / hearing but only the host can make a recording.

50. To make a recording:

- Once a meeting is open, click on the ‘RECORD’ icon in the horizontal menu.
- Select ‘RECORD ON THIS COMPUTER’ or ‘RECORD TO THE CLOUD’.
- To stop the recording, simply click on the square stop icon that appears in the top left of the screen.

51. If recording the meeting to the cloud, Zoom will then send you a link to the recording so it can be accessed by you or shared with the other participants or the court.

52. The audio and video files are stored separately so the audio recording can easily be shared with the Court or a court appointed transcriber for the purposes of obtaining a transcript.

53. The host can delete the recording and, when the recording has been copied by the Court, delete the recording from the cloud.

#### Interpreter / Intermediary Channels

54. Zoom has a feature that allows the Host to designate participants and interpreters. The Host, at the start of a meeting, can activate the interpretation feature that then provides the interpreter with a separate audio channel that other

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participants can select and listen to if they require interpretation. The original language conversation can be played in the interpretation channel but at lower volume.

55. Use of the interpreter channel would not be appropriate when a witness is giving oral evidence as the recording facility of Zoom will only centrally record the main speak channel and not the separate interpreter channel (although that can be recorded on the device of the person listening to the interpretation should the Host grant permission). With simultaneous translation in a fact-to-face court hearing, the court system would not normally record the translation being provided as it is too quiet to be heard, so we do not see the inability to centrally record the interpreter channel as a difficulty for remote hearings by Zoom. However, when a witness is giving oral evidence, the interpreter can speak and interpret through the main audio channel so questions, interpretation and answers are all fully recorded.
56. To activate the interpreter channels the Host must hold a business or enterprise level Zoom licence. However, the interpreter channel is also available if the host purchases a webinar bolt-on (the bolts-on can be purchased on a case by case basis and are paid monthly). To activate the interpreter channel:
  - Sign into ‘MY ACCOUNT’ on the Zoom website.
  - Click ‘SETTINGS’.
  - Scroll to ‘MEETINGS (ADVANCED)’.
  - Click to enable ‘LANGUAGE INTERPRETATION’.
57. When scheduling a meeting / hearing that requires an interpreter:
  - Click ‘SCHEDULE A NEW MEETING’.
  - Click to ‘GENERATE AUTOMATICALLY’ a meeting ID (required for this feature).
  - Click ‘ENABLE LANGUAGE INTERPRETATION’.
  - In the text box type the email address of the interpreter and select the language from the drop down menu (click ‘ADD INTERPRETER’ if more than one interpreter is required).
  - Click ‘SAVE’.
58. To open the interpreter channel once the meeting has started:



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- Click ‘INTERPRETATION’ in the tool bar.
  - Select interpreter from the drop down menu and click ‘START’.
59. To listen to interpretation:
- Any participant can click on ‘INTERPRETATION’.
  - Click on the language required.
60. The interpreter will hear the audio from the main meeting and the participant will hear the interpretation with the original audio at a lower volume. To end interpretation, the Host:
- Click on ‘INTERPRETATION’.
  - Click ‘MANAGE LANGUAGE INTERPRETATION’.
  - In the pop-up that appears click ‘END’.
61. The interpreter feature can be also be used by an intermediary in exactly the same way. A fictitious language will need to be chosen for the channel to be opened but once opened, the channel will work as set about above for the above for the intermediary.
62. An alternative way to facilitate the involvement of the intermediary is simply for the intermediary and the client to have a pre-assigned break-out room that they can adjourn to at any time, and for the intermediary to join the meeting / hearing as an additional participant. Pre-hearing / pre-meeting discussions and assessment can take place in the breakout room but during the meeting or hearing, the intermediary checks the understanding and welfare of the vulnerable witness in full hearing of all participants and then adjourn to the breakout room whenever required.

#### How to Facilitate Access to a Zoom from Skype for Business and an HMCTS DOM1 Laptop

63. There is one ‘once only’ step that the ‘Host’ of a Zoom meeting must take to enable Skype users to join zoom meetings:
- Log into the [Zoom.us](https://zoom.us) account, sign in and to this page:
    - [https://zoom.us/account/setting#advanced\\_meeting\\_options](https://zoom.us/account/setting#advanced_meeting_options)

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- About 80% of the way down the page is a toggle to...
  - Switch on "Allow Skype for Business (Lync) client to join a Zoom meeting"

64. That is a step that does not need to be repeated.

#### Judges – How to Access a Zoom meeting from Skype for Business and an HMCTS DOM1 Laptop

65. We have undertaken a number of tests with different Judges at different locations and have discovered that Zoom is accessible via a DOM1 laptop if used by the Judge at their home, and we presume on any wifi or internet connection outside of the Court. Numerous tests have identified that the DOM1 laptop within the court on a direct cable internet connection or on wifi will not work.

66. A judge using a DOM1 laptop cannot connect to Zoom by using the link in the invitation email.

67. To connect to a zoom meeting, for each meeting, the Judge using a DOM1 laptop must do the following:

- Each meeting has a meeting ID. It is shown in the title bar of most browsers and appears within the body of a Zoom meeting invitation email. For example: Meeting ID: 123 456 789
- The DOM1 user:
  - Opens Skype for Business
  - Clicks on Contacts
  - In the Search box, enter [meeting ID with no spaces]@lync.zoom.us – for example- 123456789@lync.zoom.us
  - One of the results that will then appear in the contacts list will be that same entry, for example- 123456789@lync.zoom.us
  - Click on that result
  - Then click on the video button in the meeting window

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- The Zoom meeting will then open.

#### Additional Features

68. There are many more advanced features available within the Zoom platform but , as with the training provided by the FLBA for Adobe Acrobat Pro DC and PDF Expert, we have identified those features we believe are those required for the effective management of advocates meetings, client conferences and remote court hearings.
69. Zoom works extremely well on Windows computers and Macbooks, with no loss of functionality between the different operating systems.

Darren Howe QC

On behalf of FLBA Paperless Working and Technology Sub-Committee

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**FLBA**

**Video Conferencing / Remote Hearings**

**Instructions for use of Microsoft Teams**

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Introduction

1. Microsoft Teams is an online video conferencing platform that can be used to hold conferences, meetings, and remote court hearings. It is part of the package that Microsoft offers through its Office 365 for business plans. It is secure and GDPR compliant.
2. Microsoft has been phasing out Skype for Business since 2017, replacing it with Microsoft Teams<sup>7</sup>. Thankfully, there is some cross-compatibility between the two platforms<sup>8</sup>.
3. Microsoft Teams is available on all computers and mobile operating on Apple, Windows, or Android operating systems.

Cost

4. There are two plans that Microsoft offer:
  - b. Office 365 Business Essentials (£3.80 plus VAT per month per user);  
and
  - c. Business Premium (£9.40 plus VAT per month per user).

There is no difference in the Microsoft Teams software between Business Essentials and Business Premium. If you already have all the Microsoft software you need (such as Word or Excel), there is no need to get Office 365 Business Premium.

5. Further information about Office 365 Business and to purchase a plan, please visit: <https://products.office.com/en-gb/compare-all-microsoft-office-products?&activetab=tab:primaryr2>

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<sup>7</sup> If you have not upgraded your software since circa January 2018, you may be able to activate a hitherto dormant account for Skype for Business you did not know you had. Otherwise, Microsoft won't let you open a new account for Skype for Business (even if you ask nicely).

<sup>8</sup> Set out below under the heading 'Skype for Business'

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6. If you have multiple users within your organisation, you can set up one Microsoft Business account. You will be able to add as many users as you like.
7. One user can operate the same username to have Microsoft Teams on different devices, i.e. on iPad, Computer and on phone.
8. Before purchasing a plan, please speak to your email/website provider. If you are already using a Microsoft product for your email, you may be able to add-on Microsoft Teams as part of your existing package.
9. If you are setting up multiple users within the organisation, please ensure that each user has reset their password to ensure you are compliant with GDPR.

#### Installation

10. Microsoft Teams is available on iOS and Android. It is available to download on Mac, Windows and Linux. You can download it from the App Store or Google play, alternatively, please visit:  
<https://teams.microsoft.com/downloads#allDevicesSection>
11. It is highly recommended that you have Microsoft Teams installed on a tablet, desktop or laptop. Using Microsoft Teams on your mobile phone:
  - a. Makes it more difficult to use some of the features available on Microsoft Teams (such as only being able to see one screen at a time); and
  - b. Is not appropriate for a professional in a remote court hearing, particularly if you are walking/moving around, because of the user experience for everyone else.
12. If you must use your phone, it is highly recommended you have it resting on a table in a stable manner. It is advised to use a phone mount.

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Guidance from Microsoft

13. This document aims to provide all the necessary skills to be able to use Microsoft Teams for remote working for legal professionals. However, Microsoft provides help/guidance in the following ways:

- a. On a Desktop or laptop, when you are in Microsoft Teams, at the bottom left corner you will see Help icon. This opens up a menu that shows, inter alia, ‘Topics’ and ‘Training’:
  - i. Topics – provides useful guides and a search facility to provide reading material on tasks, such as setting up meetings, sharing files, etc; and
  - ii. Training – gives 1 or 2 minute videos showing you how to carry out tasks, such as setting up meetings, sharing files, etc. [this material is not as detailed as ‘Topics’ but is more than sufficient to train you in all essential skills]

If you are using Microsoft Teams on a tablet, you do not have the help/guidance in the same manner but you can access the website set out below on your tablet in the following way:

- i. Select the four lines on the top left;
  - ii. Select ‘Settings’;
  - iii. Select ‘Help and feedback’; and
  - iv. Select ‘Help’
- b. Microsoft Teams help & learning webpage is an extremely helpful resource that includes tips and live online classes:  
<https://support.office.com/en-gb/teams>
- c. The administrator of your Microsoft Teams account can contact a support agent through their admin centre (available at: <https://portal.office.com> ). This support includes them calling them back and guiding them through anything they are struggling with (including by remotely accessing their device and helping them set up

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Microsoft Teams for the entire organisation). This support comes at no extra cost and I think is 24 hours (although it may take a few hours before they call you back).

14. Whether you choose option a. or b. (above), the skills and methods shown are exactly the same, just in a (slightly) different format.

#### Setting up a Meeting

15. To set up a meeting:

- a. Select 'Calendar';
- b. Select 'New meeting' on the top right;
- c. In the box entitled 'Add title', give a name to the meeting;
- d. In 'Add required attendees', put in:
  - i. People in your organisation by searching their names or usernames;
  - ii. For people outside of your organisation:
    1. If they have Microsoft Teams and/or Skype for Business:
      - a. Search their email address/usernames;
      - b. After typing their email address/username, an option to 'explore [email address]' will appear';
      - c. Select this option; and
    2. If they do not have Microsoft Teams or Skype for Business:
      - a. Search their email address;
      - b. After typing their email address, an option to 'invite [email address]' will appear below;
      - c. Select this option.
- e. Check to ensure the date and time of the meeting is accurate;
- f. You can leave channel and location blank;
- g. (If you want) you can put in any further details for this meeting; and
- h. Click 'Save'.



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16. The invite will go to the invitees via email. If they accept, you will get confirmation they have accepted in your email. The meeting will appear in your calendar on Microsoft Teams and on your device calendar (if your device calendar is linked to your Microsoft Teams account). If an invitee accepts the invitation, it will also appear in their Microsoft Teams/Skype for Business calendar (if they have either) and their device calendar (whether or not they have Microsoft Teams or Skype for Business).

17. Additionally, you can invite participants to a meeting in the following ways:

- a. During a meeting, access the ‘show participants’ option during in-meeting options<sup>9</sup> and either:
  - i. Type the name of the participant in the ‘invite someone’ and select their name; or
  - ii. To the right of the ‘invite someone’ box, click on the icon to copy the link to meeting. You can then send that link to someone via email.
- b. You can forward the email inviting you to a meeting so that they can copy the link.
- c. You can set up a meeting as described above using calendar in outlook, selecting the ‘new event’ button and selecting the add online meeting option.

#### Joining a meeting

18. Once you accept an invite received in your email, the email will go straight to your trash/deleted mailbox and the meeting will be scheduled into your calendar.

19. To join a meeting:

- a. If you are in Microsoft Teams<sup>10</sup>:
  - i. Select ‘Calendar’;

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<sup>9</sup> Please see below

<sup>10</sup> If someone has joined your meeting before you, a purple banner will appear at the top of the screen informing you the meeting has started with a button to ‘Join’.

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- ii. Select ‘Join’; and
  - iii. Select your audio and video settings (i.e. video/microphone on or off), click ‘Join now’.
- b. If you do not have Microsoft Teams open:
- i. Open your device calendar;
  - ii. Find the meeting and look at the notes for that meeting; and
  - iii. Click on the link entitled ‘Join Microsoft Teams meeting’;
  - iv. Select your audio and video settings (i.e. video/microphone on or off), click ‘Join now’.

#### In-Meeting Functions

20. If you touch the middle of the screen (if on a tablet) or if you click on the middle of the screen (if on a laptop/computer), an options bar will appear that gives you the following options:

- a. Video on/off;
- b. Microphone on/off;
- c. ‘Share’<sup>11</sup>;
- d. More options (marked by ‘...’). The most useful for our purposes are:
  - i. Device settings (advanced audio and video settings);
  - ii. Show Meeting notes. These notes are shared by everyone who is invited to the meeting, this will include any lay parties joined to the meeting. For advocates’ meetings and/or professionals’ meetings, this might be a good place for agendas, noting areas of agreement/disagreement;
  - iii. Blur background. Not available on some devices, including iPads. Recommended if the option is available;
  - iv. Live captions. This provides live subtitles. I’m not sure whether or not this serves a purpose, but it might avoid the need to ask someone to repeat themselves;
  - v. Recording<sup>12</sup>.

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<sup>11</sup> Dealt with separately

<sup>12</sup> Again, dealt with separately

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- e. Show Conversation. This provides a ‘chat’ facility during a meeting. Again, participants should be aware that this can be viewed by all participants to a meeting.
- f. Show Participants. This tells everyone in the meeting who is attending the meeting and who has been invited. The organiser has the option to:
  - i. Remove people from the meeting;
  - ii. Mute everyone in the meeting<sup>13</sup>;
  - iii. Invite others into the meeting<sup>14</sup>.

21. If you are on a desktop/laptop/tablet, the last four people who have spoken will remain visible. At the bottom of the screen, you will see initials or profile photos (if they have one), showing you who else is in the meeting. If you are using your phone, you can only see the participant who is speaking.

22. However, if you want one or more participants (up to a maximum of four) to remain visible (perhaps the judge, or an advocate who is in the middle of submissions), you can ‘pin’ them so they remain visible even if others speak.

To do this:

- a. On a desktop/laptop, right click or double click on their video (if they are visible) or their initials/profile picture, and select ‘pin’;
- b. On a tablet/phone, press and hold on their video (if they are visible) or their initials/profile picture, and select ‘pin’.

### Multiple Rooms

23. Rather than having one meeting to be used for pre-hearing conferences, advocates meetings as well as the hearing itself, it is preferable to set up multiple meetings that can run simultaneously. Follow the steps for ‘Setting up a Meeting’ and set up as many meetings as you need. Consider a setup as follows:

- a. Meeting for conference with client(s);
- b. Meeting for advocates;

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<sup>13</sup> This feature is available to everyone who is in the same organisation as the organiser.

<sup>14</sup> This appears to be limited to people in your organisation.

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c. Hearing.

24. This ensures that only those people invited/intended for a particular meeting are able join and it avoids confusion if the meetings are clearly labelled (Hearing, advocates meeting, conference, etc.).
25. You cannot be in more than one meeting at any one time and if you join one of the other meetings whilst still in another meeting you will be shown as ‘on hold’ in the first meeting.

#### Sharing in a meeting

26. There are a number of features through which you can share information.
27. If you wish to share a document with everyone at the meeting so they can download it:
  - a. Select the ‘Show Conversation’ feature in the meeting;
  - b. In the ‘chat box’, select the paperclip icon below; and
  - c. Select the document you wish to share<sup>15</sup>.
28. Alternatively, if you wanted to share something on your screen:
  - a. Select the ‘Share’ Feature in the in-meeting options;
  - b. Select the application you wish to share, for example:
    - i. PDF application you are using for your bundle;
    - ii. Video/Audio file that you want the meeting to see/hear; or
    - iii. Word Document such as position statement/skeleton.
  - c. If you are running a second screen you can choose to share that screen with the meeting.
  - d. To stop sharing, select ‘stop presentation’ at the top of the screen.
  - e. This option also features a virtual ‘whiteboard’ that you could draw on, should you wish to illustrate something to others in the meeting.

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<sup>15</sup> There are additional apps such as Share Point that allow you to see and edit a document together, which might be useful for drafting orders or terms of agreement/disagreement for professionals. However, this falls outside the remit of this guide.

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29. Whilst practice is recommended with all the functions it is particularly encouraged with this function to avoid the risk that you inadvertently share sensitive material with the meeting.

#### Recording

30. This section details how a recording can be made using Teams. Attention is drawn to the Remote Access Family Court paper regarding the restrictions on recording hearings. No recording should be made other than as directed by the Court.
31. The recording feature is available under ‘more options’ whilst in a meeting. It records audio and video and stores it on a cloud system called ‘Stream’. All attendees will get a notification that meeting is being recorded and when the recording has stopped.
32. Only the organiser or another attendee from your organisation can record using the application. Anyone outside the organisation or a guest is unable to record. This means that litigants in person and/or lay parties will not be able to record<sup>16</sup>.
33. After the meeting ends, you will get an email from Microsoft Teams with a link to the recording. You can then download the file (to then be emailed/shared to the court) and delete it from the cloud.

#### Skype for Business

34. There is cross-compatibility between Skype for Business and Microsoft Teams. If you create a meeting on Microsoft Teams and invite someone who has Skype for Business, they will still be able to join the meeting.
35. If someone invites you to a meeting through Skype for Business, you can still join the meeting. To do this:
- a. Download Skype for Business from the following:

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<sup>16</sup> That does not prevent them from recording the audio on their phone without attendees knowing (as they could in a hearing they attend in person) or lying to the court about others being in the room, who could be taking pictures or video from the side (which is a risk regardless of what software is used for remote hearings).

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Windows Computers:

<https://products.office.com/en-gb/skype-for-business/download-app?SilentAuth=1>

Mac Computers:

<https://www.microsoft.com/en-us/download/details.aspx?id=54108>

Mobile Devices:

<https://support.microsoft.com/en-us/office/install-skype-for-business-on-a-mobile-device-3239c8a3-cf55-4ff0-a967-5de51911c049?ui=en-us&rs=en-us&ad=us>

- b. Install Skype for Business;
- c. Log in to Skype for Business using your Microsoft Teams username and password.
- d. Select 'join' when the meeting is due to start.

### Zoom

36. You can download the Zoom app onto Microsoft Teams. To do this:
  - a. Select 'Apps' at the bottom left hand;
  - b. Search 'Zoom';
  - c. Select 'install';
  - d. Log in using your Zoom username and password (or create an account if you do not already have one).
37. This has the benefit of having all your Zoom meetings in the same calendar as your Microsoft Teams calendar.
38. You can also launch a Zoom meeting whilst you're using Microsoft (including whilst you're in a meeting on Microsoft Teams).

### Guests – Litigants in person / Lay parties

39. People who do not have either Microsoft Teams or Skype for Business can still accept meeting invitations when they receive an email.

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40. They can join the meeting via their calendar.
41. When they try to join the meeting, they will be given two options:
  - a. Join via the web; or
  - b. Download Microsoft Teams.
42. If they wish to join via the web, they will need a web browser other than Safari. Firefox or Chrome are recommended.
43. Please make sure litigants in person / Lay parties are online through Wi-Fi. Using video for lengthy meetings/hearings will use up a lot of mobile data.

A Guide for Judges

44. You can access Microsoft Teams either via the ejudiciary home page or by downloading the desktop version to your laptop. It is strongly recommended to use Firefox as your browser.
45. To access Microsoft Teams via the ejudiciary home page:
  - a. Go to the ejudiciary home page;
  - b. Click on app launcher (nine dots on the top left);
  - c. Select 'Office 365';
  - d. Click Teams online app. This opens in a web browser which you can then use.
46. The desktop app for Microsoft Teams is much more robust and effective. To download:
  - a. Select the 'Download desktop app' icon (bottom left hand corner);
  - b. Save file;
  - c. In the 'Downloads' folder, double-click 'teams\_windows\_x64.exe';
  - d. Follow instructions from there to complete installation; and
  - e. Login with ejudiciary email and password.

Danish Ameen

On behalf of FLBA Paperless Working and Technology Committee

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**FLBA**

**Video Conferencing/ Remote Hearings**

**Instructions for Use of Lifesize**

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Introduction

1. Lifesize is an online high definition video conferencing platform. It is authorised for use under the terms of the Remote Family Court Protocol and is encrypted by default to the highest standards to ensure communications are safe and secure. Whilst it is an alternative platform to Skype for Business ('SFB') and Microsoft Teams ('Teams'), those systems are automatically integrated, so meetings through Lifesize can be accessed by any person who uses the SFB or Teams software. No additional software is required, and any person using SFB or Teams can access a meeting on the Lifesize platform simply by clicking on a designated link they will have been sent in advance.
2. The benefit of the above is that judges with restricted 'DOM1' MoJ laptops can take part in hearings set up to take place on Lifesize, but through the SFB or Teams which has been installed on their judicial laptop. They can also access a Lifesize meeting simply through an internet browser which may be installed on the judicial laptop, such as 'Edge' (if the latest version), or an internet browser on any personal (ie: non-judicial) computer, tablet or smartphone.
3. A number of experiments were conducted in the week of 23-27 March 2020, using judicial DOM1 laptops. Many thanks to the various Circuit Judges who assisted. It has been confirmed that a professional judge with a DOM1 laptop can simply 'click on a link' and access (via SFB or Teams) a Lifesize meeting that has been set up.
4. Currently a judge who is within a Court building (and thus using the court's internet/Wifi) will encounter difficulty due to firewall/security restrictions that may feature in the internet provided within court buildings. This has been affecting many of the video conferring platforms (eg: Zoom and Lifesize) and it is understood that HMCTS are looking into it.

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5. In a number of respects, Lifesize operates in a very similar way to ‘Zoom’, and works on Macs and PCs, as well as Apple, Windows and Android tablets and smart phones.

#### How to Access Lifesize

6. You do not need to download the Lifesize app in order to access a Lifesize meeting to which you have been invited. A Lifesize subscription (and downloading the app) are only required to create a meeting. As explained below, you can simply ‘click on a link’ that the person who organised the meeting will have emailed to you in advance, and that link will take you straight into the meeting through your web browser.

#### Downloading the App onto a PC or laptop computer

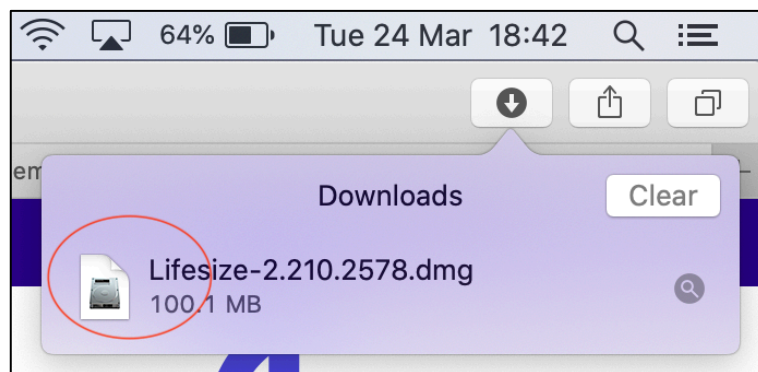
7. You will need to Register with Lifesize before you download the Lifesize App. Before you register, please note:
  - a. If your Chambers has taken out a business subscription to Lifesize then your chambers email address will be part of a “Lifesize Account Group”. Your Chambers administrator will need ‘invite’ you to Register with Lifesize. You will be sent a link. Do it through this link, not of your own volition online.
  - b. If you have (or want to have) an independent subscription, the above does not apply so you can register independently. As discussed below in ‘Pricing’, there is a subscription option which is free of charge for 6 months.
8. Whichever way you register you should then receive an email to the email address you provided during registration which directs you to download the Lifesize App and provides a link. Click that link.

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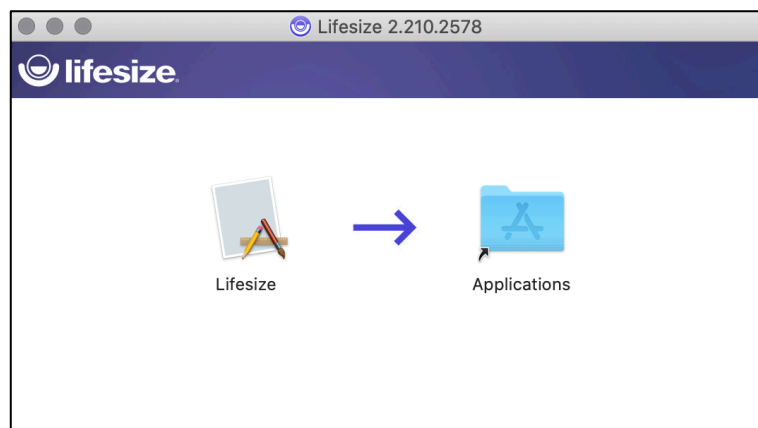
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9. Your internet browser will launch and you will be asked if you want to download the Lifesize App. Click on the appropriate one (i.e. for Mac, or PC). You may be asked to allow permissions etc. Click “Allow”.
10. If you are using a PC: Go to your downloads folder in ‘File Explorer’. Double click on what you have just downloaded, it will have a file name like “Lifesize-2.210.2578.dmg”. Follow the step-by-step instructions to install the app.
11. If you are using a Mac:
  - a. Go to the top right of your screen and click on the icon which is a small down-facing arrow, then double-click the icon which is circled in red in the picture below:



- b. If you are asked again whether to allow permissions, click ‘allow’.
  - c. This will very quickly bring up this box:



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- d. Click once, hold and drag the icon labelled 'Lifesize' and drop it over the top of the folder labelled 'Applications'. It is now installed.
- e. Now, once more: click, hold and drag the icon labelled 'Lifesize' into your 'toolbar' at the bottom/side of your computer screen, where it will sit alongside your other apps. Lifesize is the purple circle below:



12. If you have followed the steps above correctly, you now should have Lifesize installed on your computer.
13. Now open up the application by clicking on it. You may be asked if you are “sure you want to open it”. Click “Open”.
14. You may be asked to log in again. If so, you use your the email and the password you set up during the Registration process.
15. Follow the steps above for any computer on which you want to install Lifesize. The webpage to go to in order to download any Lifesize app is: <https://call.lifesizecloud.com/download> but you can just do a Google search for ‘Lifesize app download’.

#### Downloading the App on your Phone or Tablet

16. Depending on whether you own an Apple product or an Android device, go to the relevant App Store and search for ‘Lifesize Video Conferencing’. It will have the same purple circle icon as seen above.

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17. Click “Download”. Once downloaded you will need to log in with your email address and password, which you will have set up under the registration process.

#### Cost

18. It costs nothing to join a Lifesize meeting that has been organised by another person and you do not need to have downloaded the Lifesize App. There is no limit on how long you can stay in a meeting which has been organised by another person.
19. Lifesize are currently offering a free subscription for 6 months. This allows you, as a host, to have a maximum of 25 participants for an unlimited duration. However, this free subscription does not include conference recording.
20. The pricing for Lifesize depends on how many members of a Chambers need to be signed up. The US prices are as follows: The standard package is between 1-15 hosts and is priced at \$16.95 a month per host. This package is the same as the 6 month free package, but in addition it allows for 100 participants.
21. If between 15-50 members of Chambers agree to join, the package is \$14.95 a month per host. You then qualify for the ‘plus’ package which allows you to host up to 300 participants, 4k resolution and one hour of recording storage per host.
22. If a minimum of 50 members of Chambers agree to join, the package is \$12.95 per host, per month. This package is then upgraded to the ‘enterprise’ package, allowing unlimited meeting recording.
23. If you are signing up as an individual barrister, unless you are likely to need over 25 participants or need to record the meeting, it is advised to use the free 6 month package, which Lifesize call a ‘Freemium’ account. This was previously limited to a 90 minute call duration, but during the Covid-19 crisis, Lifesize have increased this to a 24 hour call duration.

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24. Lifesize also sells meeting room system packages which include microphones and video cameras. This is not necessary for individual barristers to purchase.

#### Setting up a Meeting Room / Hearing

25. If you have a subscription to Lifesize (either independently or through an organisation such as a barristers' chambers), you will be able to create meetings yourself and invite people to them. Some chambers may decide that it is preferable for the clerks to be tasked with arranging the more formal Meetings (such as court hearings, arbitrations and private FDRs), rather than the individual barristers.

26. But how does one CREATE a virtual meeting room, in order to then invite someone to participate in it? From within the App on your computer:

- From the 'Home' screen click on the 'Meetings' tab on the left;
- In the top right corner of the screen click 'Create Meeting';
- For a short meeting/hearing, select 'one-time meeting'. This create a meeting room that will exist for 24 hours after the first participant joins it, and will then be automatically deleted;
- For a multi-day hearing, select 'permanent meeting', which will create a meeting room which will not be deleted until you delete it yourself;
- Give the meeting room a name;
- You can name yourself or someone else as Moderator;
- For added security you can also insert a numeric passcode that invitees will have to use to access the meeting;
- Creating a meeting will generate this screen:

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**Create a Meeting**  
Create a new place to meet and collaborate.

Meeting Type  One-time Meeting  
 Permanent Meeting

Name\*  
Conference - 2pm Wed 25.3.20

Moderator\*  
Thomas Dance

Set a numeric passcode  
(recommended)

Other Options

Add a description

Cancel Save

- Click 'Save'. That will generate a virtual 'Meeting room' to which you can invite people. If you click on the 'meetings' tab on the left of the screen you will see your meeting next to any others you have arranged. Your new meeting named 'Conference – 2pm Wed 25.3.20' will be there.
- Note that this meeting is only visible to you and not to other members of your chambers.
- NB: Any meeting that you create is not scheduled for a specific 'time'. The meeting room is ready to go from the moment you create it. If you wish, you could enter the meeting room (say) two hours before the time agreed with all other parties, but you will be told 'you are the only participant in this meeting' until the other participants arrive. If it is a 'one-time meeting' this will start the clock on 24 hours until the meeting is automatically deleted
- NB: You can use the smartphone app to create a meeting, but it can only be an immediate meeting (ie: that starts instantly):
  - Click the video camera blue button on the bottom right of the screen
  - Click make a new call.
  - Type in the email address or phone number of the person you want to call.



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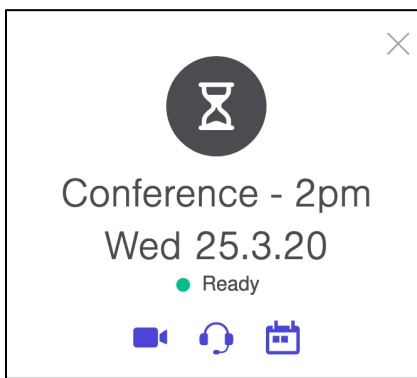
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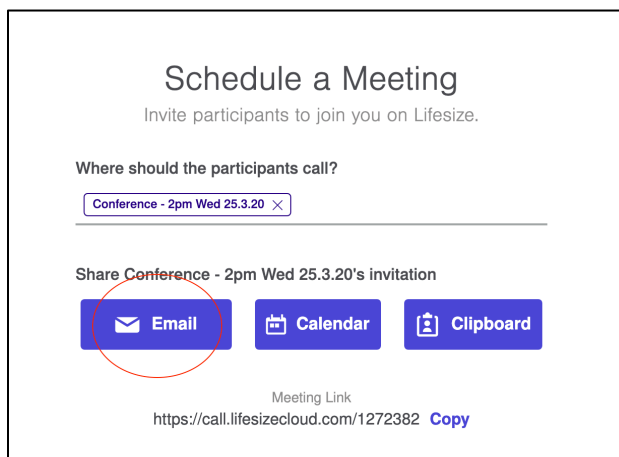
- Click the video icon for a video call or the headphone icon for an audio call.

#### Inviting other people to a meeting / hearing

27. So how do you INVITE someone to the meeting? There are two options: email or calendar. This document will only cover inviting people by email as it is by far the easiest option. In the “Meetings” tab within the App you will see all of the meetings that you have created. Click on the meeting to which you wish to invite participants. You will be faced with this:



28. To join the meeting immediately you can click the purple camera icon or the purple headset icon. To invite people to the meeting you click the calendar icon, in purple at the bottom right. This will produce this screen:

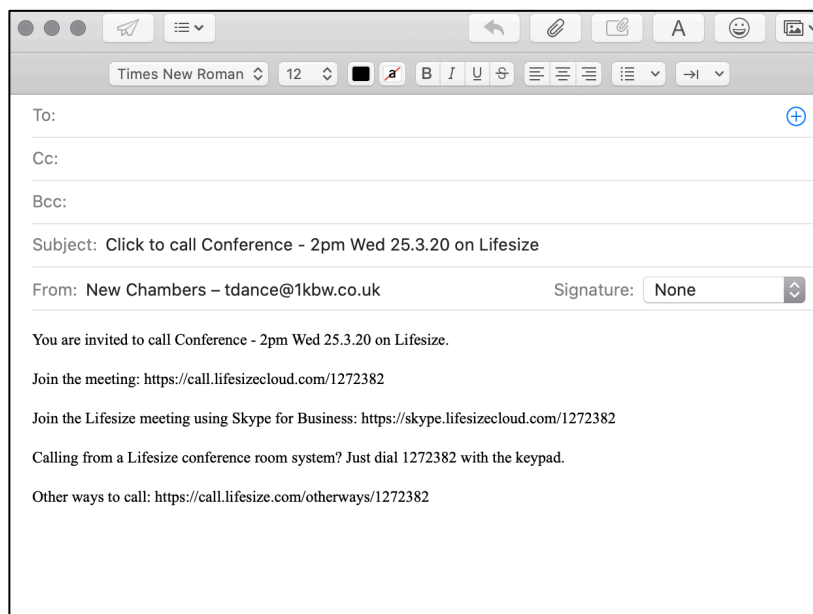


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29. Click on “email” which is circled in red above. This will generate a draft email from the default email address on your device (likely to be your professional email address). The automatically-generated email will have links in it that anyone attending the meeting (i.e.: the judge, client, solicitor etc) can click on. When they click on it, they will instantly join the meeting whether or not they have downloaded the Lifesize app and whether or not they are a Lifesize registered user (see above under “How to Join a Meeting”).



30. At the time of the meeting you, as the ‘Moderator’ (ie: creator) of the meeting can attend through the app (as above) because the meeting will be in your list of ‘meetings’ (as you were the one who created it).
31. Please note that the named Moderator of the meeting can control the recording, mute and unmute the participants, lock the meeting (so no one else can join) and end the meeting entirely (everyone else simply ‘leaves’).

#### Setting up multiple meeting rooms

32. In many cases you will want to set up multiple meeting rooms, so that there are private areas for taking instructions from clients or negotiating with other

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counsel. This will require the creation of numerous meeting rooms, using the method outlined above. Each meeting room you create will generate an ‘invitation link’ that can be emailed to invitees and clicked on to gain access to that meeting room. You (or your clerks) can then send each participant an email with all of the relevant links that they may need during the hearing.

33. For example, in a financial remedies hearing / private FDR, you will probably want to create four separate meeting rooms:

Meeting Room	Who gets the invitation link?
Hearing room	Everyone (including the judge)
Wife’s conference room	Wife, solicitor, wife’s counsel
Husband’s conference room	Husband, solicitor, husband’s counsel
Counsel’s negotiation room	Both counsel only

Top Tip: If a hearing has been set up by the court itself (eg: a Skype hearing), the court will probably not have created any ‘breakout’ rooms. You may therefore wish to create some separate ‘Lifesize’ meeting rooms to run alongside the court hearing, so that you and your client have somewhere private to ‘go’ in order to take instructions and so that you and your opponent(s) have a private space to discuss the case.

#### How to join a Lifesize Meeting to Which You Have Been Invited

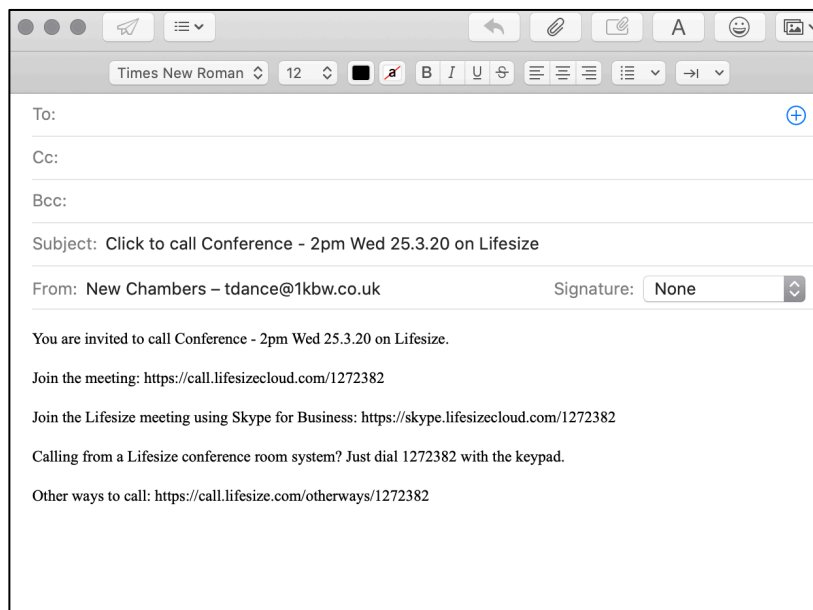
34. It may be that some judges, lawyers or lay parties will not have the Lifesize App installed on their devices. This does not matter at all. Downloading the app is only necessary if you wish to create a meeting.
35. To access a meeting to which you have been invited, the process is the same – you simply click on the link in the email you will have been sent in order to join the meeting:

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- a. If you do not have the Lifesize app, clicking on the link will open a window in your internet browser and you will join the meeting;
  - b. If you do have the Lifesize app, clicking on the link will simply start the app and you will join the meeting through the app.
36. A ‘Moderator’ (i.e.: the person who set up the hearing or meeting) will have arranged the Meeting in advance. Lifesize will have automatically generated an internet link which will grant access to the Meeting to whomever has that link. Clicking on that link allows access to a meeting (with a passcode if that option has been selected when creating the meeting).
37. All the participants (including judges) will therefore be sent an email with a clearly demarcated link to click to access the Meeting Room. The email might also include links to access any additional rooms which are particular to that recipient (such as ‘wife’s conference room’ or ‘counsel’s negotiation room’ in the example above). The email automatically generated by Lifesize looks a bit like this (but can be amended in any way you wish):



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38. Anyone using a device with an internet browser can simply click on the first link in the list (the “Join the meeting” link). However, judges using ‘Skype for Business’ will need to click on a different link (as explained below).
39. A word of practical advice: Keep the ‘invitational email’ flagged up in your inbox so that you can easily go back to it and find the links to any room to which you have been invited. This will make it easy to move quickly from one room (eg: ‘hearing room’) to another (eg: ‘wife’s conference room’)

#### IF YOU ARE A JUDGE (and wish to join a meeting through ‘Skype For Business / Teams’)

40. If you are obliged to use Skype for Business (or Teams) because you are a judge using a judicial laptop or e-judiciary account, then the process is just as simple.
41. Looking again to the example email in the box as set out above, you will see that Lifesize automatically generates a separate link for ‘Skype for Business’ users to click on in order to enter the Meeting. If you click that link, it will open up Skype for Business and you will join the meeting.
42. This has now been tested using judicial DOM1 laptops and e-judiciary accounts. For the avoidance of any doubt, you do not need to change any settings, the integration between Skype for Business and Lifesize all happens automatically.
43. One caveat: As with the Zoom platform (and others), any judge using the internet or WiFi within the confines of an actual court building will encounter problems, due (it is believed) to firewall/security restrictions in the court’s internet provision. HMCTS is working to remedy this.

#### OTHER FUNCTIONS

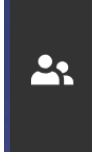
##### Seeing who else is in the meeting

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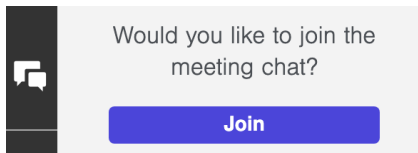
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44. If you want to see who else is on the call, click on the icon on the right hand side with little people in it and that will bring up a ‘list of participants’:



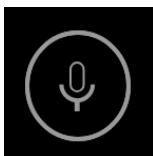
#### Messaging each other during a meeting

45. If you want to message each other during the meeting, you can join the meeting ‘chat’ by clicking on the icon on the right:

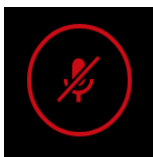


#### Muting your microphone during a meeting

46. It is probably good practice for all ‘non-speakers’ in a meeting (lay clients or solicitors for example) to keep their microphones muted unless and until they are called upon to speak. This reduces unnecessary background noises.
47. If you want to turn on or turn off your microphone, click the microphone icon at the bottom of the screen:



= Microphone is ON



= Microphone is OFF

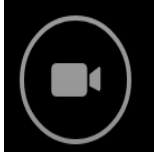
#### Turning off your camera during a meeting

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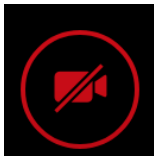
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48. Turning off the camera does not also mute the microphone. If you want to turn on/off your camera, click the camera icon at the bottom of the screen:



= Camera ON



= Camera OFF

#### Sharing your screen with others during the meeting

49. You can ‘share your screen’ (e.g. if you are talking through a document and want others in the meeting to see what is on your computer screen). If you are using a Mac, you will need to enable ‘screen recording’ in the Apple privacy settings. You share your screen by means of this icon at the bottom of the screen.



#### Recording a meeting

50. In some meetings you will be able to record the meeting (video and audio). Most if not all chambers with a Lifesize subscription will have one that enables recordings so that the platform can be used for court hearings. Any participant can record a meeting, so if a meeting is to be recorded it is advisable to agree who will be responsible for doing it. Only one participant at any given time can record the meeting. The icon is at the bottom of the screen:

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= Recording OFF



= Recording On and click to STOP

51. A note on recordings: You have to be a Lifesize Registered user (which in practical terms probably means you have downloaded the Lifesize app) in order to record. They are saved online to the cloud. In the home screen of the Lifesize App you can click “View Recordings” which takes you to the online cloud storage, from where you can share the recordings with, for example, the other parties and/or send a link to the recording to the judge (see the latest Guidance from MacDonald J v.2). The recording can also be sent externally, in the form of a link that can be clicked on to play the recording. This link can be disabled at any time to prevent the recording being viewed. Recordings are stored securely in a GDPR-compliant cloud and encrypted.

(a) To view recordings:

- From the Lifesize app home page, select View Recordings.
- Your Recordings Feed displays recordings you own or that have been shared with you. Sort recordings by date or views and by timeframe.
- My Recordings displays the recordings you own.
- After you choose a recording to view, you can click the plus icon to add the recording to your Watch List
- To view: select a recording and click play. After playback begins, you can adjust the speed and quality from settings.

(b) To share recordings:



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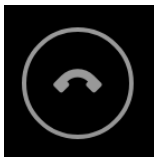
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- In the Lifesize app, select View Recordings, or navigate to Recordings in the admin console.
- Navigate to any Recordings page.
- In the search bar, enter the name of the meeting and click the share icon
- From Share Properties: Meeting Series, you can
  - Select who can view the recording
  - Get a shareable link for your Lifesize account that provides access to the meeting series.

#### Leaving a meeting

52. To leave the meeting by clicking on the telephone icon at the bottom right hand of the screen and click “leave meeting”. If you leave, you can re-enter at any time by clicking on the link in the invitational email, as before.



James Roberts QC

Peter Newman

Tom Dance

Gemma Carr

On behalf of FLBA Paperless Working and Technology Committee

30 March 2020