



# Instructions on Using Third-Party Conferencing Applications for Remote Proctoring

August 18, 2022 – September 7, 2022

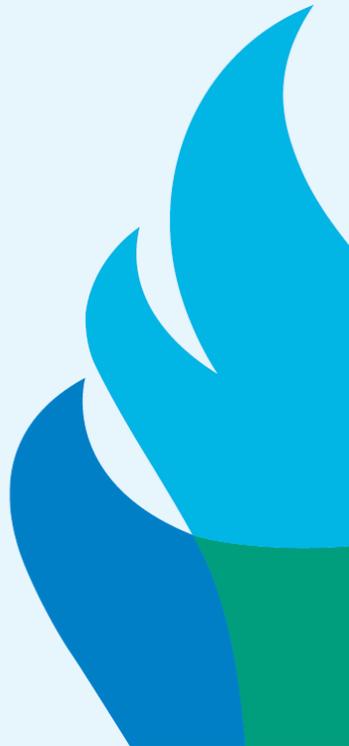
## What's inside

- ▶ Includes guidelines and explanations of third-party web conferencing software
- ▶ Provides information about using Zoom, Webex, Microsoft Teams

## Resources

- ▶ E-mail questions concerning the administration of the exam to [nbmewebtest@nbme.org](mailto:nbmewebtest@nbme.org)

*This document contains proprietary information that must remain confidential.*



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## Overview

### *Introduction*

The COVID-19 pandemic has created a situation where the practice of social distancing is required at test centers across the globe. To help address the immediate need to deliver web-based exams remotely, NBME has modified its standard test administration conditions to allow the use of third-party conferencing software to monitor examinees while we continue to explore a more robust and long-term option for remote proctoring.

At this time, this new mode for delivery and implementation will not involve high-security remote proctoring tools. Given this modification, caution is advised when interpreting individual student performance as well as when comparing scores to scores from previous administrations, and when making inferences based on the national comparative data provided on score reports and norm tables. The integrity of these administrations will rely on the honor system and codes of conduct of the educational institution and examination sponsor.

The permitted web conferencing applications are Zoom, Webex and Microsoft Teams. These third-party applications will allow a proctor to establish a visual connection to examinees via their computer camera during the test session. While this is not an ideal substitute for in-person proctoring and the social norms it facilitates, in this way proctors may remotely observe students during test administration.

### *Proctor to Examinee Ratio*

Because of the challenge inherent in closely monitoring multiple video feeds via web-conference, proctors should remotely observe no more than 25 examinees testing at a time. We recognize that these are extraordinary circumstances. It will be up to individual institutions to manage proctoring to the best of their ability.

### **Third-Party Web Conferencing Software**

Please contact your institution's technical support for additional information regarding the appropriate permissions and access to these applications and use password protected meetings when possible. Below is a brief overview of each application.

#### **Zoom**

Zoom offers video, audio, and a wireless screen-sharing performance across Windows, Mac, iOS, and Android. As of this document, Zoom's base offering supports up to 100 simultaneous connections in a meeting. The top tier version supports 500.

Zoom offers a full-featured Basic Plan for free with unlimited meetings. You can try Zoom for free - there is no trial period. Your Basic plan has a 40-minute time limit on meetings with three or more total participants. A Pro Account is required for meetings lasting longer than 40 minutes.

**You can observe up to 49 simultaneous video feeds at a time during a Zoom conference session.**

#### **Cisco Webex**

Cisco Webex is a cloud-based collaboration suite comprised of Webex Meetings, Webex Teams, and Webex Devices. Webex Meetings is Cisco's cloud-based web and video conferencing service that enables global and virtual teams to collaborate on mobile devices and standards-based video systems in real time. Webex Meetings includes features such as screen sharing, meeting recording, customizable layouts, and meeting broadcasting. As of this document, Webex Meetings supports up to 1000.

Webex has recently expanded their free plan to include:

- Unlimited usage (no meeting time restrictions)
- Support for up to 100 participants (up from 50)
- Toll dial-in (in addition to existing VoIP capabilities)

This is a limited time offer and is subject to change by Cisco.

**You can observe up to 25 simultaneous video feeds at a time during a Webex conference session.**

Webex is not recommended if monitoring more than 25 examinees in a session.

#### **Microsoft Teams**

Microsoft Teams is a unified communication and collaboration platform that combines persistent workplace chat, video meetings, file storage (including collaboration on files), and application integration.

**You can observe up to 49 simultaneous video feeds at a time during a Microsoft Teams conference session.** See **page 13** for additional information on how to enable this view.

## Zoom

### Prior to Test Day – Configure Meeting Settings

Prior to Test Day, adjust your meeting settings in Zoom as follows:

1. Go to the **Zoom Web Portal**
2. Click on **Settings** on the left navigation panel
  - In the **Schedule Meeting** settings
    - i. Enable **Mute participants upon entry**
    - ii. This setting mutes all participants when they join the meeting. The host or proctor controls whether examinees can unmute themselves on test day.
  - Adjust settings for **In Meeting (Basic)**
    - i. Disable **Private Chat**
    - ii. This setting will prevent examinees from sending a private 1:1 message to other examinees during the test session.
  - Adjust **Screen sharing** settings
    - i. Select “Host Only” under “Who can share?”
    - ii. Select “Host Only” for “Who can start sharing when someone else is sharing?”
  - Adjust settings for **In Meeting (Advanced)**
    - i. Disable **Virtual background**
    - ii. This setting will prevent examinees from replacing their background with any selected image.

### Prior to Test Day – Schedule Zoom Video Conference Session

1. Go to the **Zoom Web Portal** (or launch the Zoom desktop app).
2. From the **Meetings** tab, click **Schedule a New Meeting** (or click on **Schedule** in the desktop app).
3. Enter the meeting **Topic, Date, Time, Duration** and select your **Time Zone** from the dropdown menu. Set additional meeting settings:
  - In the **Video** settings, set **Host** and **Participant** to **on**.
  - Set **Audio** to **Both** (or **Telephone and Computer Audio** in the desktop app).
  - **Enable waiting room** and **Mute participants on entry** in the **Meeting Options** (or **Advanced Options** in the desktop app).
  - Click **Save** (or click **Schedule** in the desktop app) and add the meeting appointment to your calendar.
4. Click on the link to **Copy the invitation** (or click on **Copy Invitation** in the desktop app) and email the invitation to examinees.
5. Email Pre-Test Day Instructions to Examinees (Examine Instructions with Web Conferencing).
6. Email Examinee Instruction Sheet to Examinees.
7. A few things to note:
  - Remind examinees to download the Zoom app when clicking on the link on test day. Examinees can join via the app (recommended) or the web browser option on test day.
  - Remind examinees to enable video when they join the conference session.
  - Mute audio or mute audio on entry to minimize noise and vocal disruptions while examinees are testing.
  - Use chat to communicate with examinees in conjunction with a cell phone
    - i. The chat feature is available when examinees are not in the Secure Browser
    - ii. Once examinees launch the Secure Browser, the chat feature is unavailable
    - iii. Use a cell phone to communicate with examinees when chat is unavailable
  - Note that screen sharing was disabled in Settings and only the host/proctor should be able to share the screen during the test session (see meeting configuration settings on page 5).
  - By default, Zoom does not allow participants to record. They must request permission from the meeting organizer.
  - Instruct examinees on what to expect when the Secure browser is launched
    - i. All applications will be hidden, including Zoom. Only the test will be displayed.
    - ii. You will still be able to see the examinee.
    - iii. You will still be able to hear the examinee (if the examinee audio is still enabled).
  - Refer to the Quick Guide for Administration of Assessments for Remote Proctoring to review additional pre-test day procedures.

You can observe up to 49 simultaneous video feeds at a time during a Zoom conference session.

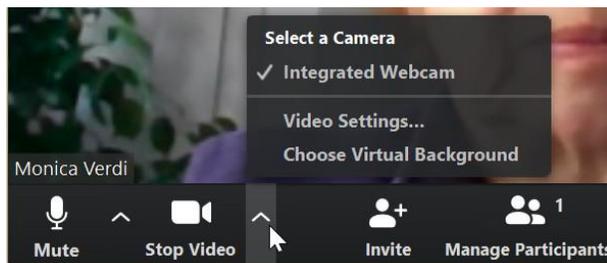
1. Start the Conference Session
  - From the **Upcoming Meetings** tab on the Zoom Web Portal, click **Start** (or click on **Meetings** and **Start** from the desktop app).
  - Click **Join with Computer Audio** when prompted.
2. Provide the following reminder instructions to examinees
  - Remind examinees to download the Zoom app. Examinees can join via the app (recommended) or the web browser option on test day.
  - Remind examinees to enable video when they join the conference session
3. Admit Examinees to the Conference Session
  - If **Enable Waiting Room** was turned on when scheduling the meeting, examinees will be placed on hold until the proctor admits examinees to the conference session.
  - Click **Admit** or **Admit All** to allow examinees to join the conference session.
  - If an examinee joins after the meeting session has started, they are automatically placed in the waiting room. The proctor/meeting host will be notified with options to **Deny** or **Admit** entry to the conference session.
  - Click **Admit** or **Admit All** to allow examinees to join the conference session late.
4. Communicating with examinees
  - Mute audio or mute audio on entry to minimize noise and vocal disruptions while examinees are testing.
  - Use chat to communicate with examinees in conjunction with a cell phone
    - i. The chat feature is available when examinees are not in the Secure Browser
    - ii. Once examinees launch the Secure Browser, the chat feature is unavailable
    - iii. Use a cell phone to communicate with examinees when chat is unavailable
5. Starting the exam session and test day procedures
  - Refer to the Quick Guide for Administration of Assessments for Remote Proctoring to review additional test day procedures.
6. Once all examinees have left the session, end the Conference Session
  - Click on **End Meeting**.

**Note:** Once examinees have launched the Secure Browser you will be able to see and hear examinees (if their microphones are unmuted). All conferencing features will be unavailable to examinees, including chat. The Secure Browser will also prevent any screen sharing from starting. If you need examinees to perform any troubleshooting actions on their device, they must first exit the Secure Browser by holding down CTR+Shift+Q on their keyboard. Using this key sequence will prevent examinees from losing testing time while you engage in troubleshooting problems.

### Viewing Video Layout in Zoom

On test day, select the gallery view to see thumbnail display of all participants in a grid pattern. The pattern will expand and contract as participants join and leave the meeting.

1. On the Zoom toolbar, click on the arrow for video to view the Video Setting options.
2. Click on **Video Settings** to open video options.
3. Under the **Meetings** section, click on “Display up to 49 participants per screen in Gallery View.”



## Webex

There are multiple ways to schedule and start a Webex session, below are the steps to use the web version.

### *Prior to Test Day – Schedule Webex Video Conference Session*

1. Go to the **Webex Web Portal**.
2. From the **Meetings** tab, click **Schedule**.
3. Enter the meeting **Topic, Date, Time, Duration** and select your **Time Zone** from the dropdown menu. Expand **Show Advanced Options** and set the following:
  - In the **Audio** settings, select **Webex Audio** as connection type and select checkboxes to display toll free and global call-in numbers.
  - In **Scheduling Options > Attendee Privileges**, click **Edit attendee privileges** and uncheck **Control application, web browser or desktop remotely** and **Participate in private chat**. with **Other participants** and click **Ok**.
  - Click **Schedule**.
4. Click on the **Copy icon** to copy and paste the meeting invitation to email your students or copy and paste your student's email addresses in the "Attendees" or "Who is invited" email field.
5. Email Pre-Test Day Instructions to Examinees (Examine Instructions with Web Conferencing).
6. Email Examinee Instruction Sheet to Examinees.
7. A few things to note:
  - Remind examinees to join the meeting via the link you have provided.
  - If the examinee does not already have Webex Meetings installed, they will be prompted to download an application launcher. The examinee will then be asked to provide a name and email address.
  - Remind examinees to enable video when they join the conference session.
  - Mute audio or mute audio on entry to minimize noise and vocal disruptions while examinees are testing.
  - Use chat to communicate with examinees in conjunction with a cell phone
    - i. The chat feature is available when examinees are not in the Secure Browser.
    - ii. Once examinees launch the Secure Browser, the chat feature is unavailable.
    - iii. Use a cell phone to communicate with examinees when chat is unavailable.
  - Note the following about screen sharing and instruct examinees to not share their screen.
    - i. Only one person can share the screen, and it is visible to the whole meeting room.
    - ii. The mouse will become unusable on Windows devices once the Secure Browser is launched if screen recording is engaged.
    - iii. Screen sharing cannot be started once inside the Secure Browser.
  - Note that recording the meeting is only available to the proctor or meeting organizer.
  - Instruct examinees on what to expect when the Secure browser is launched
    - i. All applications will be hidden, including the Webex menu. Only the test will be displayed.
    - ii. You will still be able to see the examinee.
    - iii. You will still be able to hear the examinee (if audio is enabled).
  - Refer to the Quick Guide for Administration of Assessments for Remote Proctoring to review additional pre-test day procedures.

## On Test Day – Start Webex Video Conference Session

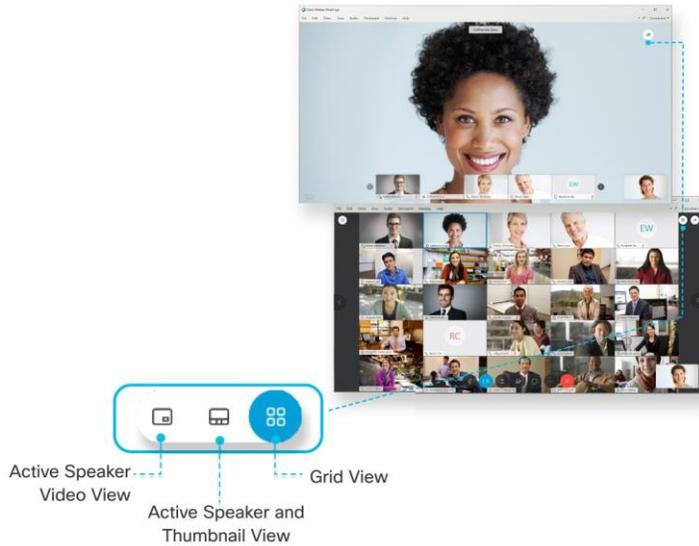
You can observe up to 25 simultaneous video feeds at a time during a Webex conference session.

1. Start the Conference Session
  - From the **Meetings** tab on the Webex Web Portal, click **Start**.
  - Enter your Audio and Video Connection when prompted.
    - i. Select **Call Me** and enter your telephone number.
    - ii. Select **Integrated Webcam** (or your camera device if not using integrated webcam).
    - iii. Click **Connect Audio and Video**.
2. Provide the following reminder instructions to examinees
  - Remind examinees to join the meeting via the link you have provided.
  - If the examinee does not already have Webex Meetings installed, they will be prompted to download an application launcher. The examinee will then be asked to provide a name and email address.
  - Remind examinees to enable video when they join the conference session.
3. Communicating with examinees
  - Mute audio or mute video on entry to minimize noise and vocal disruptions while examinees are testing.
    - i. From the **Participants** Menu, select **Mute on Entry** or **Mute All** (if examinees have joined the session).
  - Use chat to communicate with examinees in conjunction with a cell phone
    - i. The chat feature is available when examinees are not in the Secure Browser.
    - ii. Once examinees launch the Secure Browser, the chat feature is unavailable.
    - iii. Use a cell phone to communicate with examinees when chat is unavailable.
4. Starting the exam session and test day procedures
  - Refer to the Quick Guide for Administration of Assessments for Remote Proctoring to review additional test day procedures.
5. Once all examinees have left the session, end the Conference Session
  - Click on **File > End Meeting**.

**Note:** Once examinees have launched the Secure Browser you will be able to see and hear examinees (if their microphones are unmuted). All conferencing features will be unavailable to examinees, including chat. The Secure Browser will also prevent any screen sharing from starting. If you need examinees to perform any troubleshooting actions on their device, they must first exit the Secure Browser by holding down CTR+Shift+Q on their keyboard. Using this key sequence will prevent examinees from losing testing time while you engage in troubleshooting problems.

### Switching between Video Layouts in Webex

In a meeting or event, there are three different video-only layouts: Active Speaker and Thumbnail View, Active Speaker View, and Grid View. The default layout is the Active Speaker and Thumbnail View. To change the view, select the Active Speaker and Thumbnail View or the Floating View icon at the top right corner of your screen.



To use the Active Speaker View, select



To use the Active Speaker and Thumbnail View, select



To view a video feed of all students in the conference session, select the Grid View



## Microsoft Teams

There are multiple ways to schedule and start a Microsoft Teams session, below is one of them.

### *Prior to Test Day – Schedule Microsoft Teams Video Conference Session*

1. Open the **Microsoft Teams** desktop app.
2. Click the calendar icon on the left-hand side of the menu
3. Click **New Meeting / Schedule Meeting**.
4. Select your **Time Zone** from the dropdown and enter the meeting **Title, Date and Time**.
  - Enter or copy and paste your student's email addresses in the **Add required attendees field**.
5. Click **Send** to send the invitation to your students.
6. Email Pre-Test Day Instructions to Examinees (Examine Instructions with Web Conferencing).
7. Email Examinee Instruction Sheet to Examinees.
8. A few things to note:
  - Remind examinees to join the meeting via the link you have provided. Examinees can join via the Microsoft Teams app or the web browser.
  - Remind examinees to enable video when they join the conference session.
  - Instruct examinees not to blur their background or use a virtual background on test day.
  - Mute audio or mute audio on entry to minimize noise and vocal disruptions while examinees are testing.
  - Use chat to communicate with examinees in conjunction with a cell phone
    - i. The chat feature is available when examinees are not in the Secure Browser.
    - ii. Once examinees launch the Secure Browser, the chat feature is unavailable.
    - iii. Use a cell phone to communicate with examinees when chat is unavailable.
    - iv. Prior to test day instruct your institution's IT staff to disable the private chat feature or instruct examinees not to chat privately with each other on test day.
  - Note the following about screen sharing and instruct examinees to not share their screen.
    - i. Note, only one person can share the screen, and it is visible to the whole meeting room.
    - ii. Screen sharing cannot be started once inside the Secure Browser.
  - Note, the following about screen recordings:
    - i. Only one recording can be done at a time.
    - ii. If an examinee does attempt to record, only what is visible in the meeting can be recorded.
    - iii. The mouse will become unusable on Windows devices once the Secure Browser is launched if screen recording is engaged.
    - iv. The whole room is notified that the recording has started.
    - v. The recording is provided to the whole room at the end of the meeting.
  - Instruct examinees on what to expect when the Secure browser is launched
    - i. All applications will be hidden, including the Teams menu. Only the test will be displayed.
    - ii. You will still be able to see the examinee.
    - iii. You will still be able to hear the examinee (if audio is enabled).
  - Refer to the Quick Guide for Administration of Assessments for Remote Proctoring to review additional pre-test day procedures.

## On Test Day – Start Microsoft Teams Video Conference Session

Microsoft Teams allows you to view up to 49 simultaneous video feeds in a conference session. Select **More options** in the meeting controls and select **Large Gallery View**. At least 10 examinees must have their cameras turned on and select the option for Large Gallery View. If no one is sharing video, Large Gallery will not be selectable in the menu.

**Note:** To provide the best possible audio and video quality, Microsoft might decrease the number of videos you are able to see at once if you're running a little low on bandwidth or computer memory.

Commented [VH1]: Added update from MSS instructions

1. Start the Conference Session
  - Open the **Microsoft Teams** desktop app.
  - Click the calendar icon on the left-hand side of the menu.
  - Find your meeting and select **Join**. If you don't see the **Join** button, open the meeting.
2. Provide the following reminder instructions to examinees
  - Remind examinees to join the meeting via the link you have provided. Examinees can join via the Microsoft Teams app or the web browser.
  - Remind examinees to enable video when they join the conference session.
  - Instruct examinees not to blur their background or use a virtual background.
  - Examinees should not admit other examinees to the conference session.
3. Communicating with examinees
  - Mute audio or mute audio on entry to minimize noise and vocal disruptions while examinees are testing.
  - Remind examinees not to chat privately with each other (if private chat was not disabled prior to test day).
  - Use chat to communicate with examinees in conjunction with a cell phone
    - i. The chat feature is available when examinees are not in the Secure Browser
    - ii. Once examinees launch the Secure Browser, the chat feature is unavailable
    - iii. Use a cell phone to communicate with examinees when chat is unavailable
4. Starting the exam session and test day procedures
  - Refer to the Quick Guide for Administration of Assessments for Remote Proctoring to review additional test day procedures.
5. End the Conference Session
  - Once all examinees have left the session, Click on **End Meeting**.

**Note:** Once examinees have launched the Secure Browser you will be able to see and hear examinees (if their microphones are unmuted). All conferencing features will be unavailable to examinees, including chat. The Secure Browser will also prevent any screen sharing from starting. If you need examinees to perform any troubleshooting actions on their device, they must first exit the Secure Browser by holding down CTR+Shift+Q on their keyboard. Using this key sequence will prevent examinees from losing testing time while you engage in troubleshooting problems.