



Zoom Account Transition Guide

Transitioning to an Independent Zoom Account

Updated March 26, 2026

Phase 1: Transitioning to an Independent Account

Step-by-Step Instructions

UUA Admin	Account Owner	← <i>Responsible party</i>
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1	<p>Invite the Account Owner (if not already a user)</p> <p>If the intended account owner is not yet a user on the account, the UUA Admin sends an invitation. They will receive an activation email from Zoom and appear as pending until they complete it. Promotion to owner cannot proceed until activation is complete.</p>	<div style="background-color: #1a2b4d; color: white; padding: 5px; display: inline-block;">UUA Admin</div>
2	<p>Complete Account Activation</p> <p>Follow the link in the Zoom activation email to complete account setup. If the user is already a member of the account, this step is not required.</p>	<div style="background-color: #800000; color: white; padding: 5px; display: inline-block;">Account Owner</div>
3	<p>Promote User to Account Owner</p> <p>Once activated, the UUA Admin promotes the user to account owner, transferring full ownership and control to the congregation.</p>	<div style="background-color: #1a2b4d; color: white; padding: 5px; display: inline-block;">UUA Admin</div>
4	<p>Release the Account</p> <p>The UUA removes all licenses and releases the account, making it fully independent. The UUA will no longer have access once this step is complete.</p>	<div style="background-color: #1a2b4d; color: white; padding: 5px; display: inline-block;">UUA Admin</div>

Cloud Recordings & Clips

While the account has no licenses, the congregation will lose the ability to manage cloud recordings and Clips — however, the files are not deleted and existing links will continue to work. Full administrative access is restored once new licenses are added.

Phase 2: Setting Up Your Independent Account

Items 1-3 can be done in any order.

<input type="checkbox"/>	<p>Upgrade to a Paid Plan Upgrade to a Pro or Business annual plan through Zoom. Payment details are collected during the upgrade. If you have a Zoom Cares coupon code, apply it at checkout — see Step 3. Manage your Zoom subscription</p>	<p>Account Owner</p>
<input type="checkbox"/>	<p>Submit Sales Tax Exemption If exempt from sales tax, submit documentation directly to Zoom. The Zoom Cares discount does not cover sales tax — this must be filed separately. Manage billing & tax exemption</p>	<p>Account Owner</p>
<input type="checkbox"/>	<p>Apply for the Zoom Cares Discount Apply via the Zoom Cares page — verification is handled by GoodStack. A 501(c)(3) determination letter will qualify; some congregations have also been approved on state tax exemption status. Upon approval, GoodStack issues a coupon code for 50% off an annual plan. How to apply a coupon code — Zoom Support</p>	<p>Any congregation member</p>
<input type="checkbox"/>	<p>Reassign Licenses as Needed After you upgrade to a pro or business plan you may need to reassign the licenses you purchased to the users in your account. How to assign Zoom Licenses</p>	<p>Account Owner</p>