

New Phone for a Parent

START HERE

- 1 Power on the new phone and connect it to the home Wi-Fi.
- 2 If prompted, sign in to the carrier account or scan the activation code they provided.
- 3 Watch the top of the screen for signal bars and the carrier name.
- 4 Make one test call to your own phone to confirm the line is live before moving on.

Stuck? Call or text Bill — real help, no rushing.

Call or text: (330) 200-8042

Book a visit: billshometech.com/book · \$99 flat first visit



Setting Up a New Phone for a Parent — Activation Day Checklist

Activate the line, move the data, set text size, write a cheat sheet — a calm walk-through for setting up Mom or Dad's new phone.

————— **An Extended Guide · No. 1713 · SETUP** —————

Tech Made Simple. Service Made Personal.

Bill Davis — Bill's Home Tech

(330) 200-8042 · bill@billshometech.com · Atwater, Ohio

Book a visit — billshometech.com/book

What's Inside

Everything in this guide, with page numbers. Skip to whichever chapter answers your question right now.

1. What This Day Is Really About	5
2. Before You Start — What to Have Ready	5
3. Getting the Line Working	6
4. Moving Everything From an iPhone (Quick Start)	7
5. Moving Everything From an Android	8
6. Signing In to the Account That Ties It Together	9
7. Making the Text Big Enough to Read	10
8. A Few More Vision Settings Worth Turning On	11
9. Sound, Hearing, and Live Captions	11
10. Tidying the Home Screen	12
11. The Apps That Actually Matter	13
12. Contacts — Moving Them and Tidying Them	14
13. Setting Up Medical ID and Emergency Contacts	15
14. Emergency SOS and Fall Detection	16
15. Ringers, Spam Calls, and Peace and Quiet	16
16. A Gentle Word on Passwords and Security	17
17. Writing the Cheat Sheet	18
18. Common Mistakes People Make	19
19. Questions Families Ask	20
20. Working With Bill — Your Support Plan	21
21. Your Notes	21

A Picture to Follow Along 23

A Second Look 24

A Note From Bill 24

Your Visit — and My Promise 25

1. What This Day Is Really About

A calm plan beats a fast one.

If you're reading this, you've probably just handed your parent a box with a new phone in it, or you're about to. Maybe the old one finally quit, maybe the carrier pushed an upgrade, maybe you decided it was time. Either way, you're the one setting it up, and that's the right instinct. A new phone handed over half-finished is a week of frustrated phone calls. A new phone set up thoughtfully, with the big stuff moved over and the text made readable, is a phone your parent will actually enjoy.

Here's the honest truth about activation day: the technology is the easy part. The phone wants to help you. It will walk you through most of this on its own screen. The hard part is slowing down enough to do it right, resisting the urge to rush through settings your parent will never find again, and remembering that what's obvious to you is brand new to them.

So this guide is built around a calm order of operations. First we get the phone working as a phone — the line, the number, a dial tone. Then we move the photos, contacts, and apps from the old phone. Then we sign in to the accounts that tie it all together. Then, and this is the part most people skip, we make the phone easy for your parent specifically — bigger text, simpler screens, a Medical ID, and a written cheat sheet they can keep in a drawer.

WATCH OUT

Don't erase or trade in the old phone today. Keep it powered on and nearby through the whole setup, and hang on to it for at least a week. It's your safety net if a photo, a text thread, or a login didn't come across.

2. Before You Start — What to Have Ready

Ten minutes of gathering saves an hour of hunting.

The setups that go sideways almost always go sideways because something wasn't ready when the phone asked for it. The phone will stop and wait for a password, and nobody in the room knows it, and now you're resetting an account at the worst possible moment. A little gathering up front prevents all of that.

Sit down somewhere with strong Wi-Fi — the kitchen table near the router is perfect. Plug both phones into chargers so neither dies partway through a transfer. Have the old phone

unlocked and working. Everything you need is usually already on it.

- The old phone, charged, unlocked, and the passcode written down.
- The Wi-Fi name and password for the house.
- Your parent's Apple ID email and password (iPhone) or their Google account email and password (Android). This is the one people get stuck on — find it before you start.
- The carrier account details, or the activation card or email the carrier sent with the phone.
- A couple of hours with no hard stop. Don't start this twenty minutes before you have to leave.

If your parent doesn't know their Apple ID or Google password, that's normal and it's fixable, but it's much easier to reset it calmly before you begin than to hit a wall in the middle. Both Apple and Google let you reset a forgotten password from the old, still-working phone. Do that first if you need to.

WATCH OUT

If the new phone came from the carrier already activated, great. If it came in a plain box from the manufacturer, the line may need activating separately. Know which situation you're in before you power it on, so you're not surprised by a 'no service' message.

3. Getting the Line Working

Dial tone first. Everything else can wait.

The first real job is making the phone work as a phone — a number, a dial tone, the ability to call and be called. On most new phones bought through a carrier, this is already done before the box reaches you. You power it on, it finds the network, and the bars fill in. If that's your situation, you can skip ahead to moving the data.

If the line isn't active yet, you'll usually activate it one of three ways: the carrier's own app, a short phone call to the carrier, or a web page the carrier gives you. The phone will often walk you through it during the first-time setup, asking you to scan a code or sign in to your carrier account.

One thing has changed in recent years that trips people up. Newer iPhones sold in the United States — the iPhone 14 and everything after it — have no little SIM tray at all. They use what's called an eSIM, a SIM card built right into the phone. There's nothing physical to slide in. The number is transferred over the air, usually by scanning a QR code the carrier

gives you or tapping a button in the carrier's app. Many newer Android phones work the same way. So if someone tells you to 'put the SIM card in' and there's no slot, don't worry — nothing is broken, the phone just does it digitally now.

- 1 Power on the new phone and connect it to the home Wi-Fi.
- 2 If prompted, sign in to the carrier account or scan the activation code they provided.
- 3 Watch the top of the screen for signal bars and the carrier name.
- 4 Make one test call to your own phone to confirm the line is live before moving on.

GOOD TO KNOW

If you're keeping the same phone number, the carrier handles moving it to the new phone. You don't cancel anything. Once the new phone rings, the old number has moved and the old phone simply stops getting calls.

4. Moving Everything From an iPhone (Quick Start)

The easiest transfer Apple has ever made.

If your parent is going from an old iPhone to a new iPhone, Apple built a tool called Quick Start that does almost all the work. It copies photos, contacts, messages, apps, and settings from the old phone to the new one, and it's genuinely the smoothest part of the whole day.

Here's what you'll see on screen. Turn on the new iPhone and set it right next to the old one. A card slides up on the old phone that says 'Set Up New iPhone.' Tap Continue. The new phone shows a swirling blue cloud of dots, and the old phone's camera opens — you hold the old phone over the new one so the camera frames those dots, like scanning a code. That's the two phones introducing themselves to each other.

From there it asks you to enter the old phone's passcode on the new phone, and then it offers to transfer your data. You'll usually get a choice: download everything fresh from Apple's cloud, or transfer directly from the old phone to the new one. Direct transfer keeps both phones tied up until it's done but doesn't depend on your internet speed; the cloud option lets you start using the phone sooner. Either is fine for most families.

- 1 Turn on the new iPhone and set it beside the old one, both on Wi-Fi and plugged in.
- 2 When 'Set Up New iPhone' appears on the old phone, tap Continue.
- 3 Hold the old phone's camera over the pattern on the new screen.

- 4 Enter the old phone's passcode on the new phone when asked.
- 5 Choose to transfer your data, then leave both phones alone until it finishes.

WATCH OUT

The transfer can take anywhere from fifteen minutes to over an hour depending on how many photos there are. Don't pick the phones up, don't close the gap between them, and don't let either one die. Go make coffee.

5. Moving Everything From an Android

Google and Samsung each have a copy tool.

Android has its own version of Quick Start, and the exact name depends on the brand. Most Android phones use Google's built-in transfer, which runs during first-time setup. Samsung phones also include a tool called Smart Switch, which is especially good at moving the Samsung-specific things. Pixel phones use Google's transfer directly. The screens vary a little by model, but the idea is identical: connect the two phones and let the new one pull everything over.

When you first power on a new Android phone, it asks if you want to copy apps and data from another device. Say yes. It will usually have you connect the two phones with a cable (one often comes in the box, sometimes with a little adapter), or connect them wirelessly. You sign in to the same Google account your parent used on the old phone, and it begins pulling over contacts, photos, calendar, and apps.

A lot of the important things on Android live in the Google account rather than on the phone itself, which actually makes this easier. Contacts and calendar are usually synced to Google already, so once you sign in with the right account, they simply appear. Photos, if your parent used Google Photos, are already backed up and come right back.

- 1 Power on the new Android phone and connect to Wi-Fi.
- 2 When it offers to copy from another device, choose yes.
- 3 Connect the two phones by cable or wirelessly as the screen directs.
- 4 Sign in to your parent's Google account — the same one from the old phone.
- 5 Pick what to copy (everything is fine) and let it run.

GOOD TO KNOW

If your parent is switching between brands — say, an old Samsung to a new Pixel, or an iPhone to an Android — the basic transfer still works for contacts, photos, and calendar, but some text message history and app data may not come across. Keep the old phone handy for a couple of weeks in those cases.

6. Signing In to the Account That Ties It Together

Apple ID on iPhone, Google account on Android.

Every modern phone is built around one master account. On an iPhone it's the Apple ID. On an Android it's the Google account. This single login is what holds your parent's photos, contacts, app purchases, and backups together. Getting signed in to the right one — and writing the password down somewhere safe — is one of the most important things you'll do all day.

If the transfer went smoothly, the phone may already be signed in, because the account came over with everything else. But double-check. On an iPhone, open Settings and look at the very top — your parent's name should be there. On an Android, open Settings, then the section for Google or Accounts, and confirm their email is listed.

This is also the moment to gently sort out the password situation. A great many older folks have an Apple ID or Google account they set up years ago and haven't thought about since. If nobody knows the password, reset it now while you have the time and the old phone to help verify it's really them. Then write it down. Not in a note on the phone — on paper, in the cheat sheet we'll build later, kept somewhere your parent knows.

WATCH OUT

Do not create a brand-new Apple ID or Google account just because the old password is forgotten. That orphans all their old photos and purchases. Always reset the existing account instead. If you're stuck, this is a good moment to call for help rather than start fresh.

- iPhone: Settings, top of the screen shows the Apple ID name.
- Android: Settings, then Google or Accounts, shows the signed-in email.
- Reset a forgotten password from the old working phone — don't start a new account.
- Write the password on paper and store it somewhere safe and known.

7. Making the Text Big Enough to Read

The single change your parent will thank you for most.

If you do one thing beyond the basics, make the text bigger. Phones ship with text sized for twenty-year-olds with perfect eyes. A few taps turns that into something comfortable, and it's the change parents mention most often as the thing that made the phone feel usable.

On an iPhone, open Settings, tap Accessibility, then Display and Text Size, then Larger Text. You'll see a slider at the bottom — drag it to the right to grow the text. If that isn't big enough, turn on the switch for Larger Accessibility Sizes and the slider will reach much bigger steps. On the same screen you can turn on Bold Text, which thickens the letters and helps a lot of people more than size alone.

On Android, the path varies a little by brand but it's reliably under Settings, then Accessibility, then a section usually called Display size and text (or Visibility enhancements on Samsung). There are typically two separate sliders worth knowing about: Font size makes the words bigger, and Display size makes everything — icons, buttons, menus — bigger. Nudging both up a notch or two makes a Pixel or Samsung dramatically easier to use.

- 1 iPhone: Settings, Accessibility, Display and Text Size, Larger Text — drag the slider.
- 2 iPhone: turn on Bold Text on that same screen if the letters still look thin.
- 3 Android: Settings, Accessibility, Display size and text (Samsung: Visibility enhancements).
- 4 Android: raise both Font size and Display size a notch or two.
- 5 Hand the phone to your parent and let them tell you when it feels right.

WATCH OUT

Don't guess at the size. Pull up a text message or a news page, hand the phone over, and adjust while they're looking at it. The right size is the one they can read leaning back in their chair, not the one that looks fine to you holding it close.

8. A Few More Vision Settings Worth Turning On

Small changes that reduce squinting and frustration.

Beyond text size, a handful of display settings make a real difference for older eyes. You don't need all of them — pick what fits your parent — but they're worth knowing about.

- **Brightness and auto-brightness.** A screen that dims itself in a dim room can look 'broken' to someone who doesn't know why. Set brightness to a comfortable level and leave auto-brightness on so it adapts outdoors.
- **Bold text.** Covered on the last page, but worth repeating — thicker letters help contrast more than size for many people.
- **Zoom or Magnifier.** Both iPhone and Android have a magnifier that turns the camera into a reading glass for pill bottles and menus. On iPhone it's in Accessibility; on Android it's usually there too, sometimes as a separate Magnifier app.
- **Increase contrast / reduce transparency.** On iPhone, under Accessibility, Display and Text Size, these sharpen the edges of buttons and text against their background.
- **Larger app icons.** Raising Display size on Android, or using fewer, bigger icons on the home screen, cuts down on mis-taps.

The goal isn't to turn on every feature. It's to remove the specific frustrations your parent actually has. If they squint at the screen, grow the text and brightness. If they poke the wrong icon, make the icons bigger and the home screen simpler. If they can't read a pill bottle, show them the magnifier. Watch what gives them trouble, and fix that.

GOOD TO KNOW

Every one of these settings can be turned back down or off just as easily. Nothing here is permanent, and none of it can harm the phone. Experiment freely — you can always walk it back.

9. Sound, Hearing, and Live Captions

Helping the phone be heard, and seen when it can't be heard.

Hearing changes with age for most of us, and a phone set up without thinking about that can feel useless — ringing too quietly to notice, callers who sound muddy. A few settings help, and they pair nicely with the hearing-focused guide we keep on this subject.

Start with the obvious: turn the ringer volume up, and pick a ringtone that's lower-pitched rather than a high chirp, since higher pitches are the first to fade for many people. Turn on

vibration so the phone can be felt as well as heard. If your parent wears a hearing aid, there are deeper settings for that, and we cover them thoroughly in our hearing aid guide — but at minimum, make sure the ringer is loud and the phone buzzes.

One feature worth knowing about is Live Captions. On a newer iPhone, the phone can show you a running written transcript of what the caller is saying, right on the screen during a call, generated privately on the phone itself. Android has a similar Live Caption feature. For someone who misses words on the phone, reading along can be the difference between a frustrating call and an easy one. It isn't perfect and shouldn't be relied on for anything critical, but it helps a great deal in everyday conversation.

- Turn the ringer volume up and choose a lower-pitched ringtone.
- Turn on vibration so calls can be felt.
- If they miss words on calls, look into Live Captions (iPhone) or Live Caption (Android).
- Mono audio, in Accessibility, sends all sound to both ears equally — a help if one ear hears better.

TIP

If your parent wears hearing aids, it's worth a separate sit-down just for that. Our guide on hearing aid compatibility walks through pairing aids to the phone, streaming calls straight into them, and the accessibility settings that help most.

10. Tidying the Home Screen

Fewer things, bigger, where they expect them.

A new phone arrives cluttered with apps your parent will never open — stock tickers, game trials, shopping apps, whatever the maker bundled in. All that clutter does is make it harder to find the five things they actually use. One of the kindest things you can do is clear the decks.

Think about what your parent really does with the phone: call people, text, take pictures, maybe check the weather, maybe a video chat with the grandkids. Those should be front and center on the first screen, big and obvious. Everything else can be tucked away or removed. You're not deleting the phone's abilities — you're removing the visual noise so the important buttons stand out.

- 1 Put Phone, Messages, and Camera on the first home screen, in the same spots every time.
- 2 Add the two or three apps they truly use — weather, a video-call app, the pharmacy — right beside those.
- 3 Move or remove the rest so the first screen isn't crowded.
- 4 Keep it to one screen if you can. A second screen is a place things go to get lost.
- 5 Set a clear, simple wallpaper so the icons stand out against it.

On both iPhone and Android you can press and hold an app icon to move it, and the same long-press usually offers to remove it. If you're nervous about deleting something, you don't have to — just moving the clutter off the first screen is enough. The goal is that when your parent picks up the phone, the thing they want is right there, in the same place it was yesterday.

WATCH OUT

Resist reorganizing the phone to match how you'd want it. Set it up the way your parent thinks, and once it's set, don't keep moving things around. Consistency is what makes a phone learnable.

11. The Apps That Actually Matter

A short, honest list — not an app store spree.

Phones can do a thousand things, but your parent needs maybe eight. Loading up a phone with apps 'just in case' is how you end up with a confusing screen and a parent who gives up. Install what serves a real, named purpose, and skip the rest.

- Phone, Messages, and Camera — already there, just make them easy to find.
- Weather — one your parent likes, set to their town.
- Maps — Apple Maps or Google Maps, for directions and for 'find my phone' peace of mind.
- A video-call app the family already uses — FaceTime on iPhone, or whatever the grandkids use.
- The pharmacy app, if they fill prescriptions somewhere with one, for refills and reminders.
- The bank's app, only if they want it and you set up the login together carefully.
- The carrier's app, so you can both see the bill and get support.
- A photos app they understand, so they can show off pictures.

For anything that needs a login — the bank, the pharmacy, the carrier — set it up together, right now, while you're sitting there, and write the login into the cheat sheet. The single most common reason an app goes unused is that your parent got locked out and never asked for help. Logging in once, together, and recording the password prevents that.

TIP

Leave room to add apps later rather than front-loading everything. It's far better to add the one app your parent asks for next month than to bury the phone in apps they didn't request and won't trust.

12. Contacts — Moving Them and Tidying Them

The address book is the heart of the phone.

For most parents, the contacts list is the whole point of the phone. If the names and numbers came over cleanly in the transfer, wonderful — but take a few minutes to check, because a messy or missing contacts list is a daily frustration.

Open the Contacts or Phone app and scroll through. On an iPhone, contacts live with the Apple ID; on Android they live with the Google account, which is why signing in to the right account matters so much. If a lot of contacts are missing, that's usually a sign the phone is signed in to the wrong account or the old contacts were saved only on an old SIM card. Don't start adding them by hand until you've confirmed the account is right — otherwise you'll do the work twice.

Once the list looks complete, tidy it. Delete the obvious junk — old businesses, duplicate entries, numbers nobody recognizes. Then set up Favorites: the handful of people your parent calls most, pinned where they're one tap away. On both iPhone and Android you can mark favorites that show up at the top of the calling screen. For a parent, three or four favorites — a couple of kids, the doctor, a close friend — is often the most-used feature on the whole phone.

- 1 Open Contacts and scroll through to confirm the important people are there.
- 2 If many are missing, check that the phone is signed in to the right account before adding anything.
- 3 Delete duplicates and contacts nobody recognizes.
- 4 Add any missing important numbers by hand — and double-check the spelling.

5 Set three to five Favorites for the people they call most.

GOOD TO KNOW

Adding a photo to the contacts your parent calls most makes the phone friendlier and easier to use — a face is quicker to spot than a name in a list. The grandkids' pictures on the contacts are a small touch that gets a big smile.

13. Setting Up Medical ID and Emergency Contacts

The quiet setup that matters most in a bad moment.

This is the part nobody thinks to do and everyone is grateful for later. Both iPhone and Android can store a Medical ID — a page a paramedic or a stranger can see without unlocking the phone, listing who to call and what they need to know. It takes five minutes and it can matter enormously in an emergency.

On an iPhone, open the Health app, tap the profile picture in the corner, and choose Medical ID, then Edit. Fill in the basics — name, date of birth, any conditions, allergies, and the medications they take. Add emergency contacts right there in the editor. Then, crucially, turn on 'Show When Locked' so the information is visible from the locked screen, and 'Share During Emergency Call' so it's passed along automatically when 911 is dialed. Without 'Show When Locked,' a responder can't see any of it.

On Android, the path varies by brand but it's reliably under Settings, in a section called Safety and emergency (Samsung and Pixel both have one). You can fill in medical information and emergency contacts there, and it becomes reachable from the lock screen's emergency button. Take the time to enter real, current information — the conditions, the allergies, the medication list — because the whole point is that it speaks for your parent when they can't.

WATCH OUT

Medical ID is informational, not medical advice, and it doesn't replace a conversation with your parent's doctor about their health. Keep the medication and allergy list accurate and update it when things change. When in doubt about what to list, ask their doctor's office.

14. Emergency SOS and Fall Detection

What the phone can do if something goes wrong.

Modern phones have genuine safety features built in, and they're worth understanding and setting up — calmly, so your parent knows what they do and doesn't trigger them by accident.

Emergency SOS lets your parent call for help fast. On most phones, pressing and holding the side button together with a volume button starts a countdown and then dials emergency services and alerts the emergency contacts you listed in the Medical ID. It's worth showing your parent how it works once, gently, so they know it's there — and worth knowing how to stop it, so a pocket-press doesn't dial 911 by mistake.

Some newer iPhones and smartwatches also offer fall detection: if the phone or watch senses a hard fall and the person doesn't move for about a minute, it can automatically call for help and notify contacts. On Apple Watch this is turned on automatically for users over a certain age. If your parent is unsteady on their feet, a watch with fall detection can be real peace of mind — but it belongs in a conversation with them, not a surprise.

- Emergency SOS: a hard press of the side and volume buttons dials for help and alerts contacts.
- Show your parent how to start it — and how to cancel it if pressed by accident.
- Fall detection, on some phones and most newer watches, calls help after an unresponded fall.
- These work best when the Medical ID emergency contacts are filled in, so do that first.

GOOD TO KNOW

For a parent who lives alone and worries about falls, a dedicated medical-alert service or a watch with fall detection is worth a real look. The phone's built-in features are a fine start, but a device that's always on the wrist catches falls a phone in another room can't.

15. Ringers, Spam Calls, and Peace and Quiet

Loud enough to hear, quiet enough to rest.

A phone is only useful if your parent notices it ringing and isn't driven crazy by junk calls. A few settings strike that balance.

First, the ringer. Set the volume high, pick a tone they can hear, and turn on vibration. Check that the physical ring/silent switch (on an iPhone) isn't flipped to silent — a surprising number of 'my phone stopped ringing' calls come down to that little switch. On Android, make sure the phone isn't stuck in vibrate or silent mode.

Next, the junk calls, which plague older folks especially. Every carrier has a free spam-blocking tool, and the names differ by carrier — AT&T's is called ActiveArmor, T-Mobile's is Scam Shield, Verizon's is Call Filter. Turn it on. On top of that, the phone itself can help: iPhone has a 'Silence Unknown Callers' setting that sends calls from numbers not in the contacts straight to voicemail, and Android has a 'Caller ID and spam' filter. These cut down the robocalls dramatically, though they mean a legitimate call from a new number may go to voicemail, so your parent should check voicemail now and then.

Finally, rest. If your parent doesn't want to be woken at 2 a.m., set a Do Not Disturb or sleep schedule for overnight — but allow calls from Favorites to ring through, so family can always reach them in a real emergency.

WATCH OUT

Teach your parent one phrase: 'If I don't know the number, I let it go to voicemail.' Between that habit and the carrier's spam filter, most scam calls simply stop being a problem.

16. A Gentle Word on Passwords and Security

Safe, but not so locked-down they can't get in.

Security for a parent's phone is a balancing act. You want it protected if it's lost, but you don't want it so fortified that your parent locks themselves out every other day. The sweet spot is simpler than people think.

Set a screen lock — a passcode they can remember, and turn on Face ID or a fingerprint so day to day they rarely have to type it. The face or fingerprint unlock is wonderful for older folks: they just look at the phone or touch the button and it opens, no squinting at a keypad. But still set a passcode behind it, because that's the backup, and write it down in the cheat sheet.

For the accounts — the Apple ID or Google account, the bank, the email — the honest best practice is a password manager, but that's often a bridge too far for a parent, and that's

okay. At minimum, write the important passwords on paper, kept somewhere safe at home. A written list in a drawer is far better than passwords your parent can't remember and resets every month. If they're comfortable with more, that's a conversation for another day.

WATCH OUT

Never let your parent give a passcode, a verification code, or a password to anyone who calls them — no bank, no 'Apple support,' no 'grandchild in trouble' ever needs it. Scammers target older folks with exactly these calls. Teach the rule plainly: codes and passwords are never read aloud to a caller, full stop.

17. Writing the Cheat Sheet

The most valuable thing you'll leave behind.

You can do a perfect setup, and a month later your parent is stuck because they forgot how to do the one thing they needed. The fix is a cheat sheet — a single sheet of paper, in plain language and big print, that lives in a known drawer. This is, honestly, more useful than any setting you'll change.

Keep it short and concrete. Write it in your parent's words, not the phone's jargon. 'To call Susan, tap the green phone, then tap her picture at the top.' Draw little arrows if it helps. The test of a good cheat sheet is whether your parent can follow it without you in the room.

- Their phone number, written at the top (you'd be amazed how often it's needed and forgotten).
- The passcode to unlock the phone.
- The Apple ID or Google account email and password.
- The Wi-Fi name and password for the house.
- How to make a call, send a text, and take a photo — step by step, in plain words.
- How to answer and hang up a call.
- Who to call for help — your name and number, and Bill's number for the technical stuff.

Print it big, or write it by hand in large, clear letters. Put a copy in the drawer where the phone chargers live, and keep a photo of it on your own phone so you can talk your parent through things over the phone later. This one sheet of paper will save you both more aggravation than anything else in this guide.

TIP

Write the account passwords on the cheat sheet, but keep that sheet at home in a safe spot — not in a purse or wallet that could be lost with the phone. Security and simplicity can live together with a little thought about where the paper lives.

18. Common Mistakes People Make

The traps I see on setup calls, all avoidable.

After enough of these setups, the same handful of mistakes show up again and again. None are disasters if you know to avoid them.

- Erasing or trading in the old phone the same day. Keep it a week or two. It's your only safety net if something didn't transfer.
- Creating a new Apple ID or Google account because the old password was forgotten. This strands all their old photos and purchases. Always reset the existing account instead.
- Skipping the text size. A phone with tiny text is a phone that goes back in the drawer. This is the first thing to change, not the last.
- Loading up dozens of apps. Clutter confuses. Install the handful they'll actually use and nothing more.
- Not writing anything down. Passwords in your head do your parent no good next week. The cheat sheet is not optional.
- Reorganizing the phone to suit yourself. Set it up the way your parent thinks, then stop moving things.
- Rushing. Starting this twenty minutes before you have to leave is how a transfer gets interrupted and a login gets skipped. Give it an afternoon.

The thread running through all of these is patience. A phone set up in a hurry, to suit the setter-upper instead of the parent, with nothing written down, is a phone that generates frustrated calls for months. An hour of care up front buys a year of quiet.

GOOD TO KNOW

If you hit any of these walls — a forgotten Apple ID, a transfer that won't finish, contacts that won't appear — it's a quick fix for someone who's seen it before, and almost always fixable without starting over. Don't guess and don't panic.

19. Questions Families Ask

Straight answers to the ones that come up most.

Q: Do I have to set this up the day the phone arrives? No. There's no clock ticking. Pick an unhurried afternoon. The only thing worth doing promptly is making sure the line works so your parent isn't without a phone.

Q: Will my parent lose their phone number? No. If you're keeping the same number, the carrier moves it to the new phone. You don't cancel anything — the old phone simply stops ringing once the new one takes over.

Q: The old phone is broken. Can I still transfer everything? Often yes, if your parent was backing up to iCloud or Google. During setup, instead of a phone-to-phone transfer, you restore from the cloud backup. If there was no backup, you may be rebuilding by hand, which is a good argument for turning backups on going forward.

Q: My parent had an iPhone and the new one is an Android (or the reverse). Does everything move? The basics — contacts, photos, calendar — move. Some text message history and certain app data may not come across cleanly between the two systems. Keep the old phone around longer in this case.

Q: Should I put parental-style controls or location sharing on it? Location sharing, with your parent's knowledge and agreement, is lovely peace of mind — you can see they got home safe, they can find a lost phone. Do it openly, together, not secretly. It's their phone.

Q: What if I get partway through and get stuck? Stop, don't erase anything, and call for help. A stuck setup is almost always a five-minute fix for someone who's done hundreds of them.

20. Working With Bill — Your Support Plan

A real person, down the road, when you need one.

Setting up a parent's phone is exactly the kind of afternoon I've spent countless times at kitchen tables across Portage County. I've been doing this work for more than thirty years, and I've learned that the technology is rarely the hard part — it's doing it patiently, in the right order, so it actually sticks. If you'd rather not do it alone, or you've hit a wall, I'm glad to sit down with you and your parent and get it done together.

My house call is a flat ninety-nine dollars — \$99, no matter how long it takes or how many little things we sort out while I'm there. And it comes with a thirty-day come-back-free guarantee: if something we set up isn't working right, I come back within thirty days at no charge. I'd rather you call me back than struggle.

You can reach me at (330) 200-8042. If you call after hours and I can't pick up, you won't get a dead end — you'll reach Sophie, my AI helper who answers the phone, takes down what you need, and texts the details straight to me so I can get back to you. She's friendly and she makes sure nothing falls through the cracks.

GOOD TO KNOW

If I've helped you and your parent and it went well, I'd be grateful if you'd leave a quick review at g.page/r/CSFv0jbCfFINEAE/review. Word of mouth from families around the county is how folks find me, and it means a great deal.

21. Your Notes

Where we write down the details for this phone.

Every phone setup has its own particulars, and this is the page where we keep them. Fill it in as you go, and keep it somewhere safe at home — not in the bag with the phone. If I set the phone up with you, I'll fill this in before I leave.

- Phone number: _____
- Carrier and plan: _____
- Passcode to unlock the phone: _____
- Apple ID or Google account email: _____

- Account password (kept safe at home):

- Home Wi-Fi name: _____
- Home Wi-Fi password: _____
- Emergency contacts entered in Medical ID:

- Old phone kept until (date): _____
- Apps we set up a login for: _____
- Things to revisit next time: _____

Bill Davis — Owner, Bill's Home Tech — Atwater, Ohio. (330) 200-8042 —
bill@billshometech.com. Serving all of Portage County. If anything on this phone ever
stops making sense, that's what the number is for.

AT A GLANCE

A Picture to Follow Along

Activation Day

Four calm stages, in order

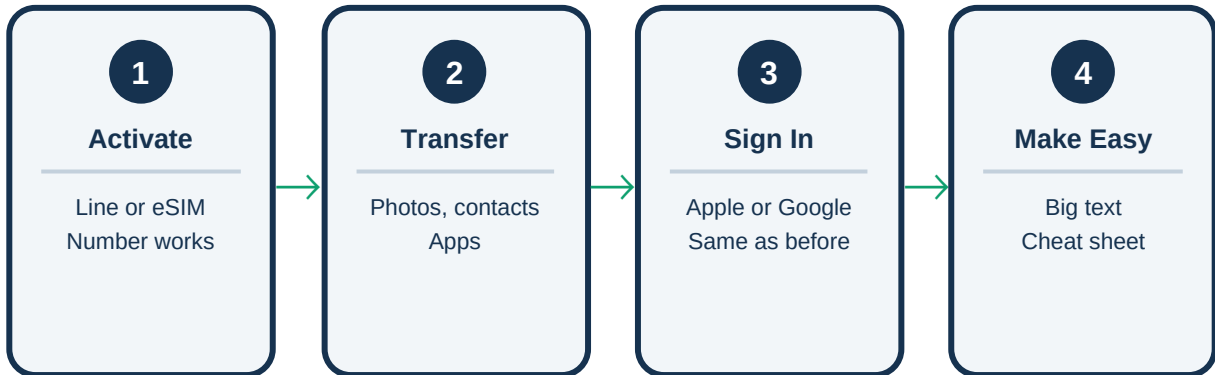
**One stage at a time — no rushing.**

Illustration — layout and details vary by model. Check your own device.

AT A GLANCE

A Second Look

Moves On Its Own vs By Hand

What transfer handles for you

**Set the by-hand items yourself before you leave.**

Illustration — layout and details vary by model. Check your own device.

BEFORE YOU GO

A Note From Bill

A quick note from Bill. I write these guides to make home tech a little less frustrating, and I do my best to keep every step accurate and up to date. Still, every home, device, and setup is a bit different, so I can't promise a guide will match yours exactly or fix your particular problem. These guides are for general information only — they're not professional, legal, or financial advice, and they don't replace your device's own manual or the manufacturer's instructions. Please go slow, use your own good judgment, and use everything here at your own risk. If a step involves electrical wiring, a gas appliance, a water heater, plumbing, or climbing a ladder — or if anything just doesn't feel safe — please stop and call a licensed professional (or give me a call at 330-200-8042). Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results.



HOW I CAN HELP

Your Visit — and My Promise

In-home visit — \$99 flat for your first visit. No contracts and no surprise charges, and a 30-day follow-up is included.

Remote Support — \$49 for a screen-share session. I only connect with your permission, you watch the whole time, and you can end anytime. If I can't fix it over the screen-share, I refund the \$49 — and if it turns out you need me in person, that \$49 goes toward your visit. It's included free for Support Plan members (\$39/mo).

GOOD TO KNOW

My promise — If you're not 100% satisfied with your visit, I'll come back at no charge, or refund the full \$99. No questions, no awkwardness. That's how I'd want to be treated.

Call or text **(330) 200-8042** · Book a visit: billshometech.com/book · bill@billshometech.com

This free guide is for general information only — not professional advice, and no substitute for your device's own manual. Any prices or outside products mentioned can change; please confirm current details before you buy. Please use your own good judgment and follow it at your own risk — for anything involving electricity, gas, water, or heights, stop and call a licensed professional. Bill's Home Tech and Bill Davis can't be responsible for any damage, data loss, or injury that results. © 2026 Bill's Home Tech, LLC.