

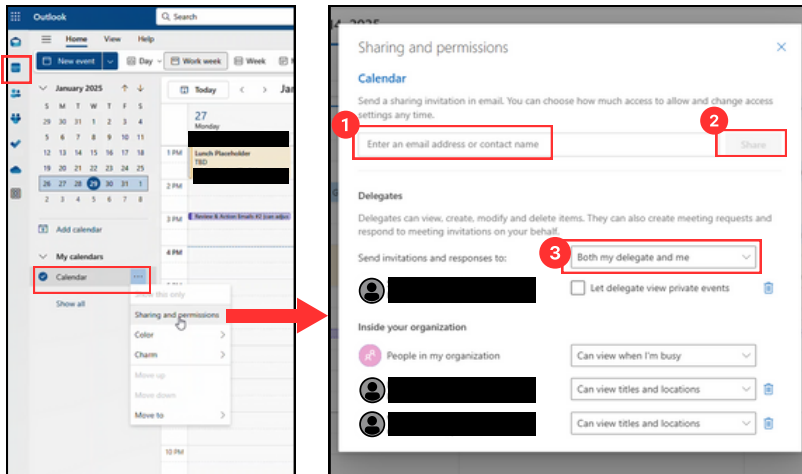


Microsoft Outlook: Calendar scheduling options

Virtual visit meetings can be scheduled one of two ways, and each option comes with different benefits and challenges. You can choose to schedule a meeting via a delegate or you can set up a scheduler-owned shared calendar in Outlook.

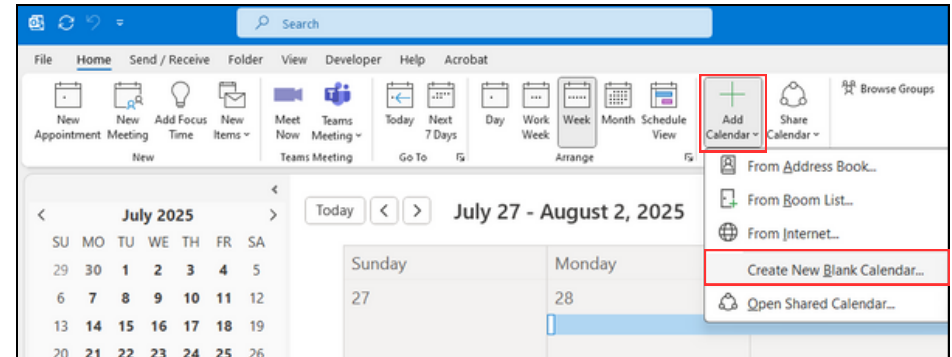
Outlook delegate scheduling

1. Access Outlook on your computers **web browser**
2. Click on the three dots (more options) next to "Calendar" under "My Calendars"
3. Click on **sharing and permissions**
4. Enter the **name or email** of the person you would like to provide delegate access to
5. Select the **drop-down list** next to their name and **choose the level of access - Delegate**
6. Click **share**
7. In the new drop-down next to your delegate's name select **both my delegate and me**



Scheduler-owned shared calendar

1. Open the **Outlook app** and click on the Calendar icon in the left menu
2. At the top click on **Home > Add Calendar > New Blank Calendar**
3. Name the calendar and click **OK**



Assign users to the new calendar

1. At the top click on **Share Calendar > Permissions > Add**
2. Search for a user, **double click on their name** to add and click **OK**
3. Give the user **edit** permissions and click **Share**
4. The user will receive an email inviting them to access the calendar

Schedule from the shared calendar

1. Open the shared calendar and select a time slot
2. Add attendees
3. Go to **Meeting Options > Roles** and set any hosts or co-hosts as co-organizers in the **Choose co-organizers** section
4. Adjust other meeting settings as needed

The table below outlines the **pros and cons** of using delegate scheduling versus a shared Outlook calendar. Use this comparison to determine which option best suits your workflow, technical comfort level, and the needs of your team. This will help ensure your calendar setup is both efficient and aligned with PHSA practices.

OPTION	PROS	CONS
<p>Delegate scheduling</p>	<ol style="list-style-type: none"> 1. Already a common method, so less training is needed. 2. The main calendar owner (principal) can start meetings with full control—no need to add them as co-organizer. 3. Avoids using a shared calendar, which might show sensitive info to too many people. 4. One clerk can manage calendars for multiple clinicians. 5. One clinician can assign more than one delegate. 	<ol style="list-style-type: none"> 1. Sometimes doesn't work well on the desktop app and may need to be set up more than once. Tip: Use Outlook on the web instead. 2. If not set up right, the main calendar owner might miss meeting invites or replies. Tip: Make sure the setting to send copies of meeting messages to the delegate is turned on. 3. Delegates may get overwhelmed by too many invites and replies. Tip: Use Outlook rules to reduce notifications, but be careful not to miss important ones. 4. No reminders to review or remove delegate access when it's no longer needed.
<p>Scheduler-owned shared calendar</p>	<ol style="list-style-type: none"> 1. No need to pay for an extra Microsoft 365 license. 2. No need to move old mailboxes to the cloud if not needed. 3. No need to connect the calendar to a group in Active Directory or Entra. 4. Uses the same audio meeting license as the main account, so Teams meetings work as expected. 5. People you invite can book meetings and add others as co-organizers. 6. Co-organizers (like healthcare staff) can start the meeting themselves. 	<ol style="list-style-type: none"> 1. If the calendar owner leaves the organization, the calendar and meetings might be deleted. 2. Delegates can't add or change other delegates. If the owner is away, permissions can't be updated.