

Microsoft Teams: Scheduling meetings

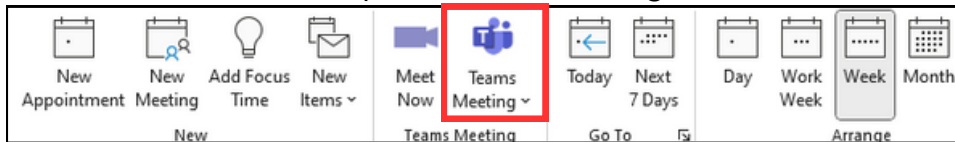
Microsoft Outlook will allow you to schedule Teams meetings. All scheduled meetings will appear on your calendar in both applications and can be edited or deleted from either application.

Before we begin

When scheduling a virtual visit, refrain from putting any clinically-relevant information in the title. Meeting titles should be generic to ensure sensitive information remains private.

Scheduling a meeting in Outlook

1. Navigate to the **calendar** tab in the Outlook app.
2. From the toolbar at the top select **Teams meeting**.



3. A window will pop-up where you can input the details of your meeting. In the window a Teams link will automatically be populated.

When scheduling a new meeting you will need to enter the meeting details and adjust the meeting options for **each virtual visit** appointment. The next pages in this document will walk you through each of the meeting options that need to be configured.

After scheduling; notifying the patient

1. Once you have configured your meeting options, **copy the meeting information (details, link, and dial in information)** before you click send.
2. Paste the copied meeting information **in a separate email or an Outlook calendar invitation and send to the patient** so the health care provider's contact information remains private.

Microsoft Teams [Need help?](#)

[Join the meeting now](#)

Meeting ID: 214 744 388 344 5
Passcode: 9Zo6Et7c

Dial in by phone

[+1 604-900-0985, 595868036#](#) Canada, Vancouver
[+1 778-436-2665, 595868036#](#) Canada, Kelowna
[+1 778-764-0241, 595868036#](#) Canada, Prince George
[+1 778-401-6203, 595868036#](#) Canada, Victoria
[+1 778-725-4963, 595868036#](#) Canada, Vancouver
[Find a local number](#)

Phone conference ID: 595 868 036#

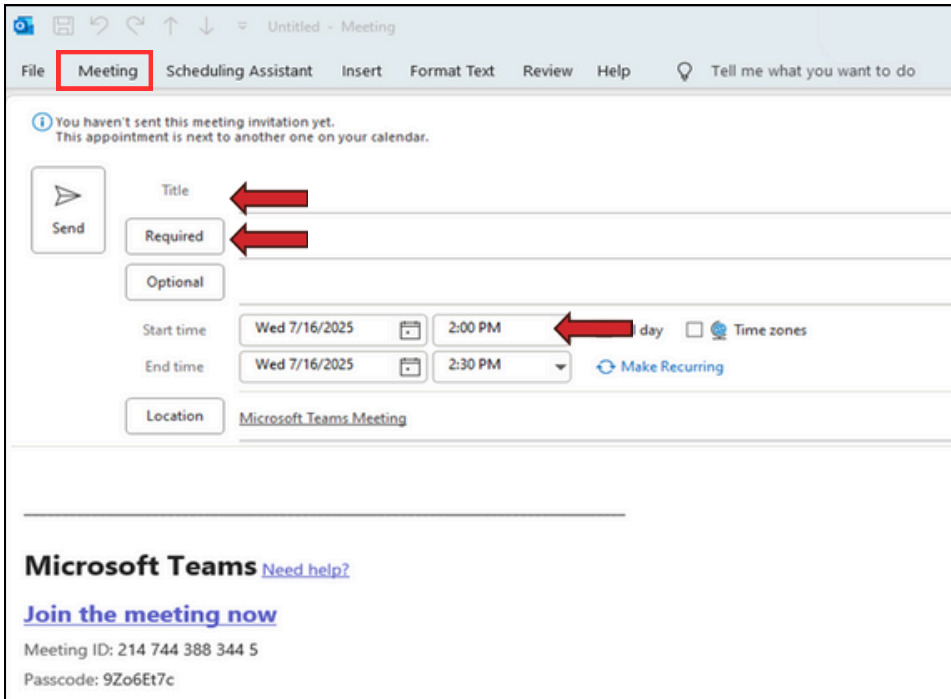
Join on a video conferencing device

Tenant key: 160689734@t.plcm.vc
Video ID: 112 075 882 4
[More info](#)

Microsoft Teams: Meeting options - part 1

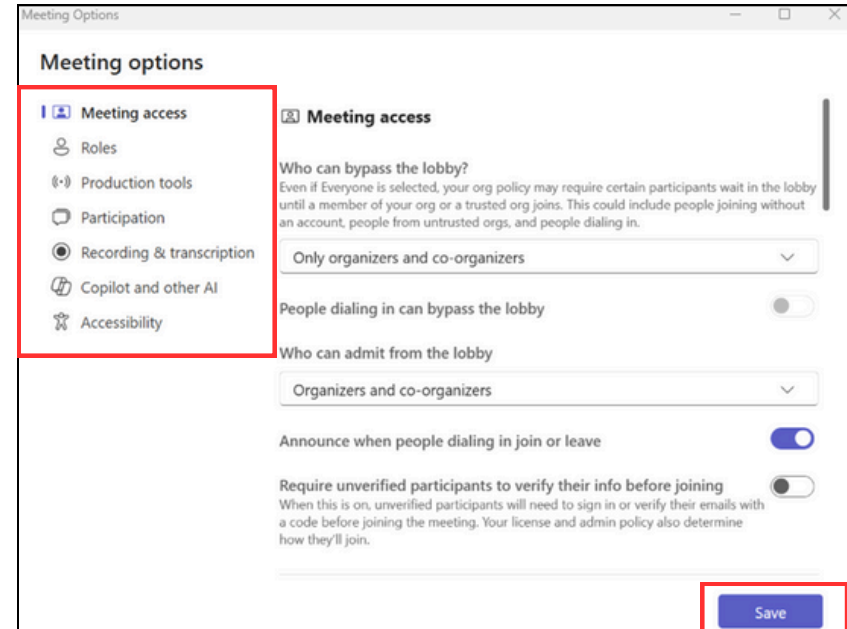
Configuring a new meeting

1. Navigate to the **calendar** tab in Outlook and create a new meeting.
2. Enter meeting **title** (input a generic title **without specific patient identifiers**).
3. In the **required** field input the health care providers that need to be included in the virtual visit (**do not add patients at this time**).
4. Adjust the virtual visit date and time.
5. In the top ribbon click **meeting**, then **meeting options** to make changes.



Meeting options window

Each time you set up a meeting you will need to configure the meeting options to the appropriate settings.



You can scroll down in the meeting options window or you can quick jump to different sections by selecting the tabs on the left hand side.

We will discuss every setting that needs to be configured on the next pages of this reference guide.

Microsoft Teams: Meeting options - part 2

Meeting access

1. **Who can bypass the lobby** select **“Only organizers and co-organizers”**.
 - This will enable a virtual lobby and ensure clinicians have control over who enters the virtual visit session.
2. **Who can admit from the lobby** select **“Organizers and co-organizers”**.
 - This will prevent anyone other than organizer and co-organizer to admit from the virtual lobby.

The other options in meeting access can be left to default

Roles

1. **Choose co-organizer** of the meeting
 - Only clinicians that were entered into the **“required field”** in **step 3** when **configuring a new meeting** will show up as options to be Co-Organizers.
 - Include at least one member of the care team as a co-organizer so they are able to admit participants from the lobby.

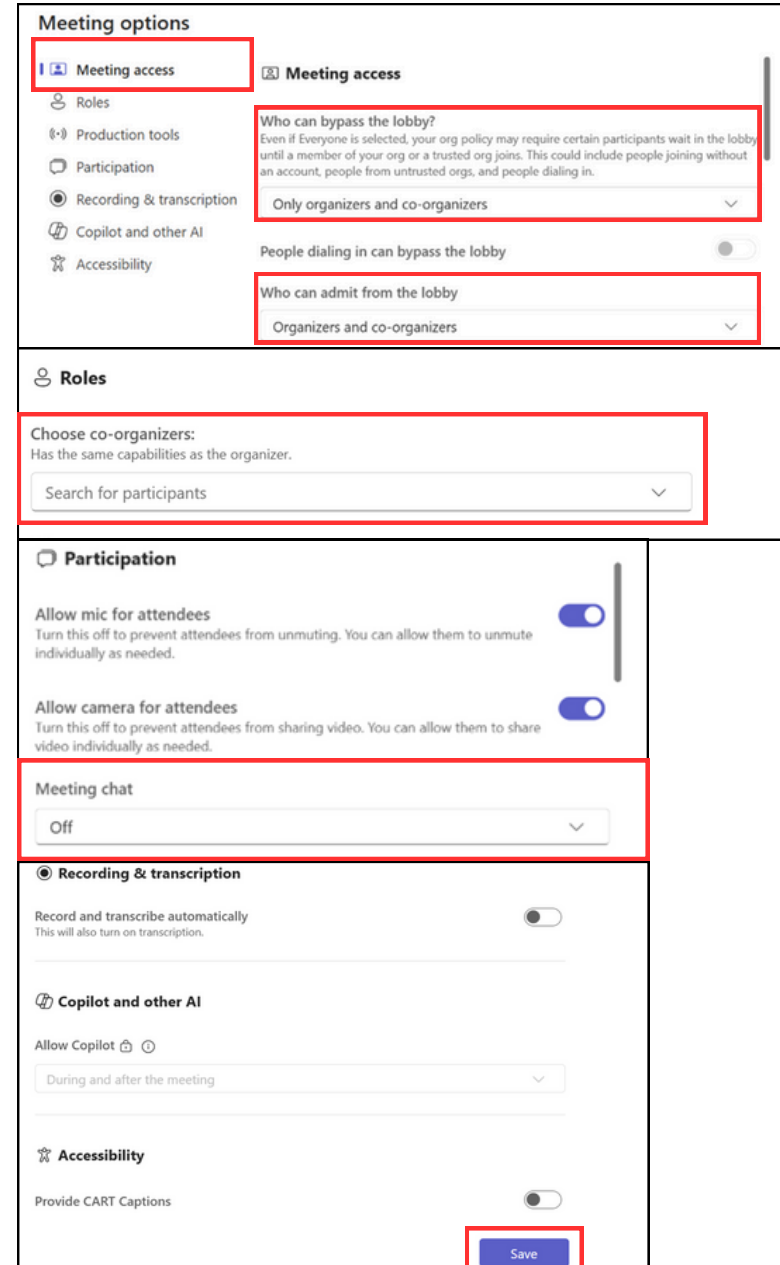
Participation

1. It is recommended that **Chat** be turned **“Off”** unless required to support clinical care.
 - If chat is required to support patient engagement it may be set to **“In-meeting only”** – See privacy recommendations when chat is enabled.
 - **Please note:** chat is not considered part of a patient's health record and should not be used to discuss clinical care; if any clinically-relevant information is posted in the meeting chat, clinicians must ensure this is captured while documenting in the patient's health record and deleted from the MS Teams chat.

Recording, transcription and Copilot

Options under recording and transcription, Copilot and other AI and Accessibility can be left disabled as default.

Click **“save”** which applied the configurations to the meeting.



The screenshot shows the 'Meeting options' panel in Microsoft Teams. The 'Meeting access' section is highlighted with a red box. It includes a 'Meeting access' toggle, a 'Roles' section, and two dropdown menus: 'Who can bypass the lobby?' (set to 'Only organizers and co-organizers') and 'Who can admit from the lobby?' (set to 'Organizers and co-organizers'). The 'Roles' section is also highlighted with a red box, showing a 'Choose co-organizers' dropdown. The 'Participation' section is highlighted with a red box, showing 'Allow mic for attendees' and 'Allow camera for attendees' toggles, and a 'Meeting chat' dropdown set to 'Off'. The 'Recording & transcription' section is highlighted with a red box, showing a 'Record and transcribe automatically' toggle. The 'Copilot and other AI' section is highlighted with a red box, showing an 'Allow Copilot' dropdown set to 'During and after the meeting'. The 'Accessibility' section is highlighted with a red box, showing a 'Provide CART Captions' toggle. A red box highlights the 'Save' button at the bottom right.

Meeting options

Meeting access

Roles

Production tools

Participation

Recording & transcription

Copilot and other AI

Accessibility

Who can bypass the lobby?
Even if Everyone is selected, your org policy may require certain participants wait in the lobby until a member of your org or a trusted org joins. This could include people joining without an account, people from untrusted orgs, and people dialing in.

Only organizers and co-organizers

People dialing in can bypass the lobby

Who can admit from the lobby

Organizers and co-organizers

Roles

Choose co-organizers:
Has the same capabilities as the organizer.

Search for participants

Participation

Allow mic for attendees
Turn this off to prevent attendees from unmuting. You can allow them to unmute individually as needed.

Allow camera for attendees
Turn this off to prevent attendees from sharing video. You can allow them to share video individually as needed.

Meeting chat

Off

Recording & transcription

Record and transcribe automatically
This will also turn on transcription.

Copilot and other AI

Allow Copilot

During and after the meeting

Accessibility

Provide CART Captions

Save