

Microsoft Teams: Scheduling meetings

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

The chat function in Teams is not considered part of a patient's health record. Chat 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.

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**.

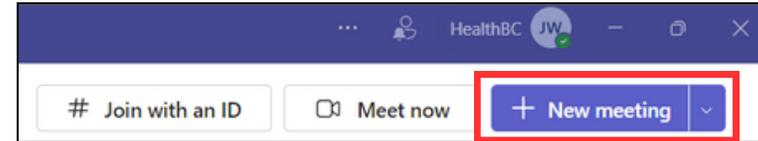


3. A window will pop-up where you can input the details of your meeting. In the window a Teams link will automatically be populated.

4. Once you have entered your meeting details copy the meeting link and click **send**. Once the meeting is scheduled **send the meeting link to the client via a separate email** so the clinician's contact information remains private.

Scheduling a meeting in Teams

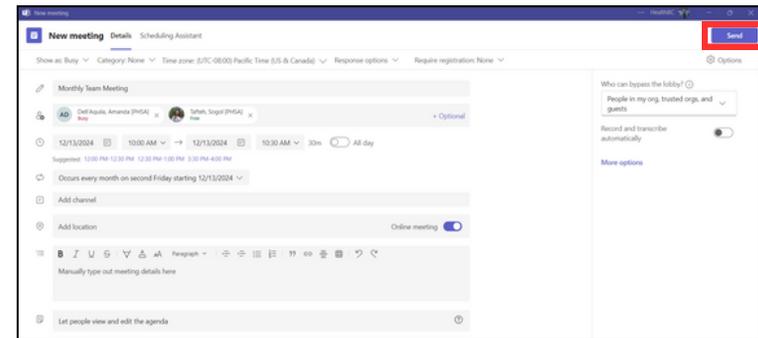
1. Navigate to the **calendar** tab in the Teams app.
2. From the toolbar along the top select **new meeting**.



3. A window will pop-up where you can input the details of your meeting:

- Add a **title** for your meeting
- Add the **required attendees** for the meeting (aside from the patient)
- Set the **date and time** for the meeting
- Set how frequently the **meeting repeats**
- Set the **location** (on-site location or online meeting)
- Add an **agenda** or **details** for the meeting

You can also toggle to the scheduling assistant tab located at the top of the window to find a meeting time that works best for all attendees.



4. Click **send** in the top right corner to deliver the invite to the meeting attendees. Once the meeting is scheduled **send the meeting link to the client via a separate email** so the clinician's contact information remains private.