Provincial Health Services Authority

Microsoft Teams for virtual visits manual

Welcome

Welcome to our guide to using Microsoft Teams (subsequently MS Teams, or Teams) for virtual visits. The purpose of this playbook is to provide an overview of the essential functions and features of MS Teams, specifically tailored for conducting remote health care consultations. Whether you're a healthcare provider or scheduler, this guide will help you navigate the platform effectively to ensure a smooth and efficient virtual visit experience.

Intended audience

All Provincial Health Service Authority (PHSA) staff using MS Teams to conduct or support virtual visits. These may include the following user roles:

- Virtual visits scheduler: administrative staff, clinician, care provider, clinician delegate
- Virtual visit host: clinician, care provider clinical care team
- External virtual visit participant: interpreter, captioner
- Virtual visits room administrator

How to use this playbook

In the Table of Contents, the **Section** column on the left, and the **Topic** column on the right represent different parts of the playbook. Click on any hyperlinked title to navigate to the corresponding page.

Additionally, you can press (ctrl + F) to open the navigation side bar and search for specific words to navigate throughout the playbook.

Recording teams meetings: Throughout this playbook there are several mentions to recording meetings and webinars. For now, recording in MS Teams is only permitted for educational sessions, vendor demonstrations, or if approved in writing by PHSA Privacy. Unless approved by PHSA privacy, permitted recordings may only to be shared internally.

Effective date: July 9, 2025

Table of Contents

The table of contents organizes the playbook into 2 columns - **Sections** and **Topics**.

1. Getting Started

This chapter provides an overview of how to locate and (if not previously done) install Teams for your virtual visits.

Note: *For clinical virtual visits, you must sign in with your corporate MS Teams account and use a corporate device for security and compliance.*

Locating the MS Teams App

On desktop / laptop computers

1. **Click on the Search Icon** on the windows bottom ribbon.
2. **Type "Teams"** or **"Microsoft Teams"** in the search bar.
3. **Right-click on Microsoft Teams** from the search results.
4. **Select "Pin to Start"** if you would like to add it to your Start menu for future use.

On mobile devices (iOS & Android)

1. **Search for "Teams"** or **"Microsoft Teams"** in the search bar.
2. Locate Teams in your app library.

In Teams-enabled rooms

1. **Locate the touch panel** in the room.
2. **Touch the screen** to wake up the system.
3. **Navigate to the Teams app** on the touch panel to begin.

On Teams phone

1. Open the MS Teams app.
2. On the left-hand panel, you should see a phone symbol.

Installing the MS Teams app

Note: *this topic only applies if the Microsoft Teams app is not currently installed on your device.*

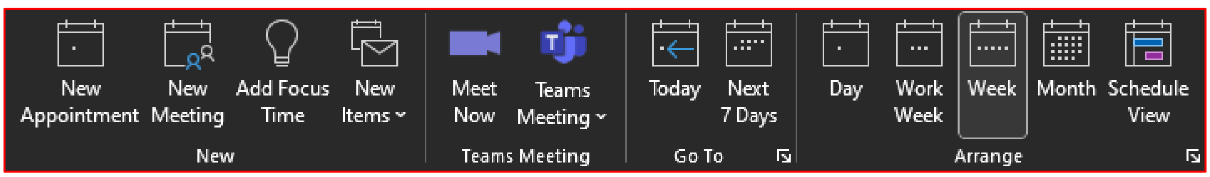
If you don't already have the Microsoft Teams app download on your corporate device, contact the PHSA service desk. This includes if you require access to Teams Phone.

Note: *Teams Phone is a separate add-on license that is free, but extended features require a Teams Phone Premium license at an additional cost. Please discuss with your team to confirm license cost coverage. Click here to open a ticket with the Service Desk.*

Locating the MS Teams Outlook Plug-in

MS Teams meeting plug-in/Instant meeting plug-in.

1. Open **Outlook.**
2. Navigate to your **calendar.**
3. Look for the **MS Teams Meeting plug-in** and **Instant Meeting plug-in ("Meet Now")** in the top ribbon.



Installing the MS Teams Outlook plug-in

Note: *this topic only applies if the Microsoft Teams app is not currently installed on your device.*

1. **Open Outlook** and go to **File** > **Options** > **Add-ins.**
2. Under **Manage**, select **COM Add-ins,** and click **Go**.
3. Ensure **Microsoft Teams Meeting Add-in** is checked.

If you do not see the plug-in, please **contact the service desk**.

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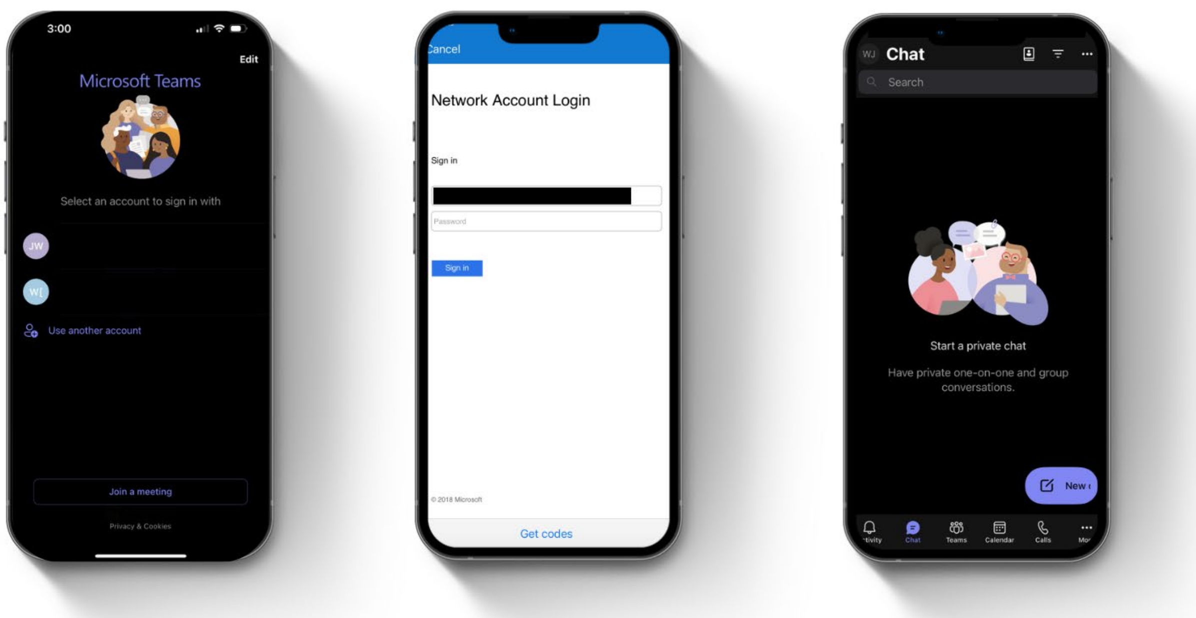
Logging into the MS Teams app

Desktop, laptops & mobile devices

1. **Open MS Teams App**
2. Click on **Log-in/Create or use another account.**
3. **Sign in via Single Sign On (SSO)** (using same credential as you would to log-in to your laptop)
4. **Allow the pop-up** on your Authenticator app and approve the prompt, if required.

Once you log in to your corporate laptop or desktop, you should not need to sign in to the Teams app separately on the same device.



For more information about information security, please see [IMITS Policy 130](#).

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2. Delegate Access

Delegate Access and Shared Calendars

Delegate access provides another Microsoft user with access to your calendar and additional permissions, such as responding to meeting requests on your behalf. As the person granting permission, you determine the level of access that the delegate has to your calendar or mail folders

We recommend setting up a delegate in Outlook via the web browser as it's easier than using the desktop app.

Assign an Outlook delegate via web browser (Recommended)

1. **Go to Outlook (via your computer's web browser)** and click on the **Calendar icon** on the left.
2. Click on the **three dots (more options)** next to "Calendar" under "My Calendars."
3. Click on **Sharing and Permissions.**
4. Type the **name or email address** of the person you want to share your calendar with and assign delegate access.
5. Select the drop-down list next to their name and choose the **'delegate'** level of access.
6. Click on **Share**.
7. After sharing, a new drop-down list will appear. In the new **drop-down list** next to your delegate's name and choose **'both my delegate and me'** as the level of access

Assign an Outlook delegate via desktop app

1. **Open the Outlook app** and click on the **Calendar icon** in the left menu.
2. Click **Share Calendar** from the toolbar at the top.
3. In the permissions tab click '**Add**' and search for the person to share your calendar with.
4. Click '**Add'** then click '**Ok'**.
5. In the '**Currently sharing with**' window select the person and choose '**Delegate'**.
6. Click '**Apply'**.

***Note:** After providing delegate access, you might need to reopen Outlook for the permissions to activate.*

Accessing a shared calendar

1. **Open the Outlook app** and click on the **Calendar icon** in the left menu.
2. **Right-click on "My Calendar"**.
3. Click on **Add Calendar** and then **Open Shared Calendar**.
4. Enter the **clinician's name** and click **OK**.

3. Scheduling

Because Microsoft products are integrated with each other, there are a variety of ways meetings can be scheduled (e.g., through Teams, Outlook or Bookings). In this document we will discuss how to schedule meetings using Outlook and Teams. If your organization uses Microsoft Bookings, you can click here to learn more.

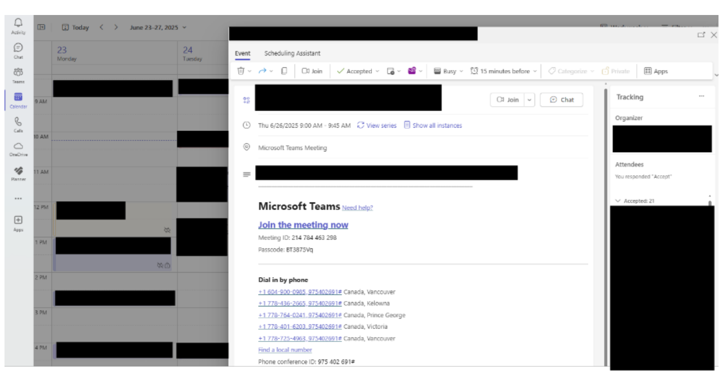
Scheduling meetings via MS Teams app

1. **Open the MS Teams app** and click on the **Calendar icon** in the left menu.
2. **Select New Event** or select a calendar block to open the meeting dialogue box.
3. Add a **title**, **clinician email address or addresses** (required/optional), **date**, **time**, and a **message**.
4. To make the meeting recurrent, click on the dropdown under the date that says **Make Recurring**. Choose the recurrence pattern, start date, repetition frequency, and end date, then click **Save**.
5. Click on **Meeting Options** and change the following:
   - **Who can bypass the lobby**: Only Organizers and Co-organizers
   - **Who can admit from lobby**: Organizers and Co-Organizers
   - Use the dropdown under **"Choose Co-organizers"** to add yourself and applicable clinicians.
   - **Who can Present**: Only Organizers and Co-organizers
   - **Meeting Chat**: Set to "In-meeting only" to enable or "Off" to disable chat
   - **Save:** Click on Save
6. Click on **Send**.

Please note: to maintain the privacy of clinicians' email addresses, share the meeting link with Clients separately by copying the link and sending it in a separate email. 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.

To see the participants invited and their responses to the meetings:

1. Go to the **Teams calendar**.
2. Double-click on the appropriate meeting.
3. Tracking should appear in a panel on the right.



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Scheduling Meetings (via delegate)

Note: *that delegation is <u>not</u> possible through the Teams app. If a delegate is required to schedule a meeting, please schedule via Outlook or Bookings.*

Scheduling a meeting as a delegate (Outlook)

1. **Open the Outlook app** and click on the **Calendar icon** in the left menu.
2. Select the **delegator's calendar** and double-click on it to schedule from that calendar.
3. In the new window, click on the **MS Teams Outlook Plug-in**.
4. Add a **title**, **clinicians' email** (required/optional), **date**, **time**, and a **message**.

Please note: to make the meeting recurrent, click on **Make Recurring**. Select the **start date**, **end date**, and **recurrence pattern**, then click **Save**. Recurring meetings are not recommended for clinical use and intended for **business use only**.

5. Click on **Meeting Options** and change the following:
    - 5.1. **Who can bypass the lobby**: Only Organizers and Co-organizers
    - 5.2. **Who can admit from lobby**: Organizers and Co-Organizers
    - 5.3. Use the dropdown under **Choose Co-organizers** to add yourself and the clinicians.
    - 5.4. **Who can present**: Only Organizers and Co-organizers
    - 5.5. **Meeting chat**: Set to "In-meeting only" to enable or "Off" to disable chat.
    - 5.6. **Save**: Click on "Save"
6. Click **Send.**

Please note: to maintain the privacy of clinicians' email addresses, share the meeting link with Clients separately by copying the link and sending it in a separate email.

View meeting responses

To see the participants invited and their responses to a scheduled meeting, navigate to the **Outlook calendar** and double-click the meeting. Then, select the **Tracking** tab to view their responses

Please note: *some participants may not respond to the meeting invite but still attend the meeting.*

Scheduling webinars

The use of webinars to conduct a virtual visit is currently under review for the time being. There will be communications and future updates to this document. If you would like to learn more about joining webinars or conducting webinars for business use, please click here.

4. Rescheduling/Cancelling

Rescheduling/Cancelling a Meeting (via Desktop)

Rescheduling a meeting or rescheduling a recurring series:

1. **Open the calendar** in MS Teams or Outlook.
2. Double-click on the meeting and choose **Edit Occurrence** or **Edit Series**.
3. Update the **date, time, or details** as needed.
4. Click **Send Update** to notify attendees.

Cancelling a meeting or cancelling a recurring series:

1. **Open the calendar** in MS Teams or Outlook.
2. Double-click on the meeting and choose **Edit Occurrence** or **Edit Series**.
3. Click **Cancel Meeting** in the menu.
4. Add a **cancellation message** (optional).
5. Click **Send Cancellation** to notify attendees.

Note- *As a delegate or scheduler, you'll need to reschedule or cancel a meeting directly in the delegator's calendar via* ***Outlook****.*

Rescheduling/Cancelling a Webinar (via Desktop)

Rescheduling a webinar (via MS Teams app)

1. In Teams, click on the **Calendar icon** on the left sidebar.
2. Locate the webinar in your calendar and click on it to open.
3. Click on the **pencil/edit icon** at the top of the meeting details page.
4. Adjust the **Start and End date and time** to the new schedule.
5. Adjust any other webinar details as needed.
6. Go to **Meeting Options** to adjust settings like registration requirements, roles, and Q&A settings.
7. Click **Save**, then select **Send update** when prompted, to notify attendees of the new schedule.

Cancelling a webinar (via MS Teams app)

1. Open Teams and click the Calendar icon on the left sidebar.
2. Locate the webinar in your calendar and click to open it.
3. Click Cancel Event at the top of the meeting details page.
4. In the pop-up, click **Cancel Event** again to confirm.

5. Joining Meetings and Webinars

Joining Scheduled Meetings

Joining scheduled meetings - internal user (logged-in)

1. Ensure you are logged into your Microsoft Teams account.
2. Confirm that the scheduled meeting is visible in your Teams/Outlook calendar.
3. Double click the meeting to open meeting dialogue box and select the **“Join the meeting now”** hyperlink
4. Review and adjust your audio/video settings, and background filters in the preview screen.
5. Click **“Join Now”** to enter the meeting.

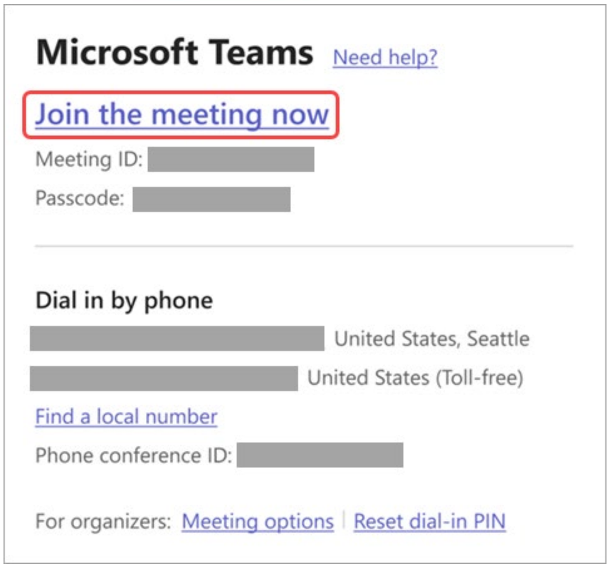
Joining scheduled meetings - external user (guest/not logged-in)

1. Click on **"Join the meeting now"** in your appointment email.
2. In your MS Teams app, type in an anonymous name (or any name of your choice) when prompted.
3. Click Join, then review and adjust your audio/video settings, and background filters in the preview screen.
4. Click **Join Now** to enter the meeting.

Joining via dial-in (audio only)

1. Call the dial-in number provided in the invite.
2. When prompted, add the phone conference ID, and provide your name.

Note- Phone conference id is different than the meeting ID.



Starting an Instant Meeting

Via MS Teams app on desktop

1. Open the Teams app and go to the **Calendar** tab.
2. Click **Meet Now** and invite participants as needed.

Via the MS Teams app on mobile device

1. Open the Teams app and tap the **Calendar** tab.
2. Click on the icon in the top right, then tap **Meet Now**
3. Once you have joined the meeting you can invite participants.

Via Outlook desktop

1. Open Outlook and go to the **Calendar** tab.
2. Click on **"Meet Now"** as an MS Teams plug-in.
3. Once you have joined the meeting you can invite participants.

Joining instant meetings

Via the MS Teams app (desktop/iOS/Android)

1. Open the meeting invite from your email or calendar.
2. Click on the **meeting link**.
3. Adjust your **audio/video settings** and click **Join Now**.

Joining a Webinar

Via the MS Teams app on desktop

1. On the day of the webinar, go to the **Calendar** in Microsoft Teams.
2. Find your scheduled webinar and double-click on it to open the event.
3. At the designated start time, click **Join** to enter the meeting.
4. As the organizer, you can control who speaks, manage attendees, and share content. Co-presenters can also join and present.

Via Outlook on desktop

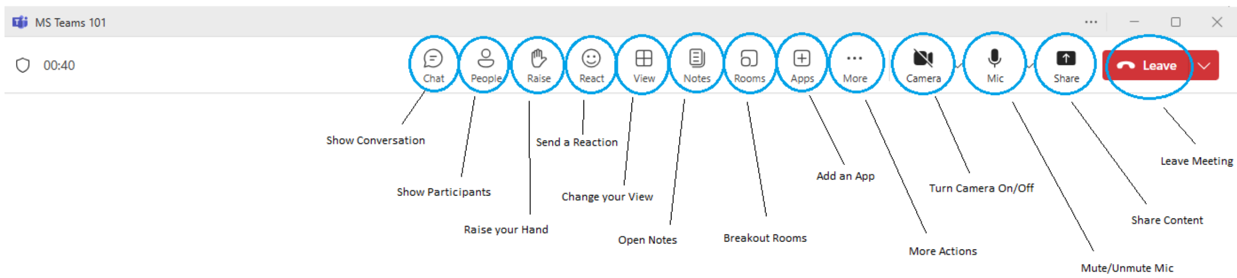
On the day of the webinar, open Outlook and navigate to your **Calendar.**

1. Double-click to open the webinar event and click **Join** when it's time to start.
2. Once you join, you'll be the organizer and able to manage the event (mute/unmute attendees, present content, monitor the chat, etc.).

6. In-Meeting Features

Meeting features via MS Teams desktop

While hosting a meeting there are a variety of features and settings available to use. Below is a screenshot of all the features, along with descriptions of the most commonly used ones when conducting a MS Teams meeting from your desktop.



Using chat

Chat

1. **Send Messages:** Click the Chat icon to send messages during the meeting.
   Note- You can hover over an internal participant's name, and send a message privately in Teams as in-meeting private messaging is not available in MS Teams.

Admitting participants

People

1. Click on the **People icon** in the meeting toolbar.
2. Check the lobby for participants waiting to join and click **Admit** (check mark) next to their name.

Using interaction buttons

Raise React

1. **Raise Hand or React:** Use the "Raise" button to raise your hand or the "React" button to use emojis.

Configuring video settings

Camera

1. Click the **downward arrow** next to the Camera icon in the toolbar.
2. Select your desired camera or toggle the camera on/off.
3. To change your background, click on **Video Effects and Settings**, choose the desired background, and click **Apply**.

Configuring audio settings

Mic

1. Click the **More** (three-dot) menu in the toolbar.
2. Select **Audio Settings** and choose your preferred microphone and speaker.

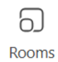
Sharing your screen

1. **Share Your Screen:** Click the Share Screen icon in the toolbar.
2. **Select What to Share:** Choose a specific window, application, or your entire screen.
3. **Share Audio:** Toggle the Include Computer Sound option to share audio from your system.

Customizing meeting options

1. **Access Meeting Options:** Click the **More** (...) menu, then select Settings and Meeting Options.
2. **Adjust Settings:** Modify options such as:
    - Who can be the co-organizer.
    - Who can bypass the lobby.
    - Who can present.
    - Allow reactions.

Managing breakout rooms



1. **Create breakout rooms:**
    - Click the **Rooms** icon.
    - Choose the number of rooms and click Create Rooms.
2. **Assign participants:**
    - Click Assign Participants to choose between automatically assigning people to a room, manually assigning them, or letting them choose their room.
3. **Start rooms:**
    - Click Start Rooms to send participants into their assigned rooms.
4. **Send announcements:**
    - Click Make an Announcement to send a message to all rooms.
5. **Rename rooms:**
    - Use the Room Settings (...) menu to rename rooms.
6. **Adjust breakout room settings:**
    - Click the Settings (gear) icon to manage:
        - Set timer for rooms to close
        - Automatic movement of participants to rooms.
        - Allow return to main meeting.
7. **Join breakout rooms:**
    1. As an organizer or co-organizer, click Join Room to enter any breakout room.
8. **Close rooms:**
    1. Click **Close Rooms** to end sessions and return all participants to the main meeting.

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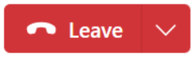
Ending meetings



1. **Leave the meeting:** Click the **Leave** button in the toolbar.
2. **End for everyone:** Select End Meeting to close the meeting for all participants.

Additional in-meeting features (desktop):

In addition to the commonly used features mentioned on the previous page, MS Teams also has some less common features to help conduct a successful meeting available on the desktop.

Prioritize video:

1. Click View, then select Prioritize Video to mainly see the video tiles of participants with their cameras on.

Lock meeting:

1. Click the **People** icon, then the three dots next to "Participants," and choose Lock Meeting to prevent additional participants from joining.

Record/transcribe meeting (use only if education or vendor demo or approved in writing by PHSA Privacy):

1. Click the More (…) menu and select Start Recording/Transcription to capture the session.

Pinning:

1. Right-click on a participant's video and select Pin to keep their video visible to you.

Spotlighting:

1. Right-click on a participant's video and select Spotlight to make their video visible to everyone in the meeting.

Remove from meeting:

1. Click **People** at the top, then in the right panel, click the three dots next to the person's name, and select Remove.

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In-meeting features via MS Teams mobile app

Below are the different features/options available when conducting a MS Teams meeting from your mobile device.

Using chat

1. **Send Messages:** Tap the **Chat** icon at the top right to send messages during the meeting.

Admitting participants

1. Tap the **Participants** icon in the meeting toolbar at the top right or select **View Lobby**.
2. Check the lobby for participants waiting to join, tap their name, and select **Admit**.

Reactions

1. **Raise hand or react:** Tap the **More (…) menu** at the bottom of the screen, then select the **hand emoji** to raise your hand or choose other reactions as needed.

Configuring video settings

1. To change your background, click on **(…)** at the bottom of your screen, and choose Background effects
2. Select your desired background and click on Done.

Configuring audio settings

1. Long hold the **speaker** icon at the bottom of your screen
2. Choose your preferred **speaker**

Screen sharing

1. **Share your screen:** Tap the **More (…)** menu at the bottom, then select **Share.**
2. **Select what to share:** Choose a specific **PowerPoint, photo, video**, or **your entire screen.**
3. **Share audio:** Toggle the **"Audio"** option while sharing to share sound from your mobile

Customizing meeting options

1. **Access meeting options:** Tap the **People** icon at the top right, then select **Meeting Options**.
2. **Adjust settings:** Modify options such as:

    Who can be the co-organizer.
    Who can bypass the lobby.
    Who can present.
    Allow reactions.
    Click on Save

Managing breakout rooms

Note: You cannot create breakout rooms on a mobile device; you can only join a breakout room.

Ending meetings

1. **Leave the meeting:** Tap the **Leave** button at the bottom right to exit the call.
2. **End for everyone:** tap the **upward arrow** next to the **Leave** button, then select **End Meeting for All** to close the meeting for all participants.

Additional in-meeting features (mobile):

In addition to the commonly used features mentioned on the previous page, MS Teams also has some less common features to help conduct a successful meeting available on the mobile app.

Lock meeting:

1. Tap the **More (…)** menu at the bottom of your screen, scroll down, and select **Lock Meeting** to prevent additional participants from joining.

Record/transcribe meeting (use only for education or vendor demo or if approved in writing by PHSA Privacy):

1. Tap the **More (three-dot)** menu at the bottom, scroll down to **Group Settings**, and select **Start Recording/Transcription** to capture the session.

Pinning/spotlighting/removing from meeting:

1. Set the size of the participant's **video tile** and tap **Pin** to keep their video visible to you, tap **Spotlight** to make their video visible to everyone in the meeting, or select **Remove from Meeting** to remove them.

In-meeting features quick guide

1. Chat Shows or hides the meeting chat, allowing you to communicate with other participants. Chat	**2. People** Displays a list of all meeting participants. People	**3. Raise** Allows you to signal that you have a question or want to speak. Raise
4. React Allows you to react to content using emojis. React	**5. View** Allow you to adjust the view of the meeting, including spotlighting a specific video. View	**6. Rooms** Creates breakout rooms for smaller group discussions within the meeting. Rooms
7. Apps You can use apps to enhance your meeting experience, such as adding a Poll or Survey. Apps	**8. More** Provides access to a dropdown menu with additional features such as Video effects, Audio settings, and Record and transcribe. More	**9. Camera** Turns your video on or off. You can access video settings via the dropdown arrow. Camera
10. Mic Mute or unmute your microphone. You can adjust sound settings via the dropdown arrow. Mic	**11. Share** Enables you to share your desktop, a specific window, or a PowerPoint presentation. Share	**12. Leave** Allows you to disconnect yourself from a meeting without ending the meeting for everyone else. Leave

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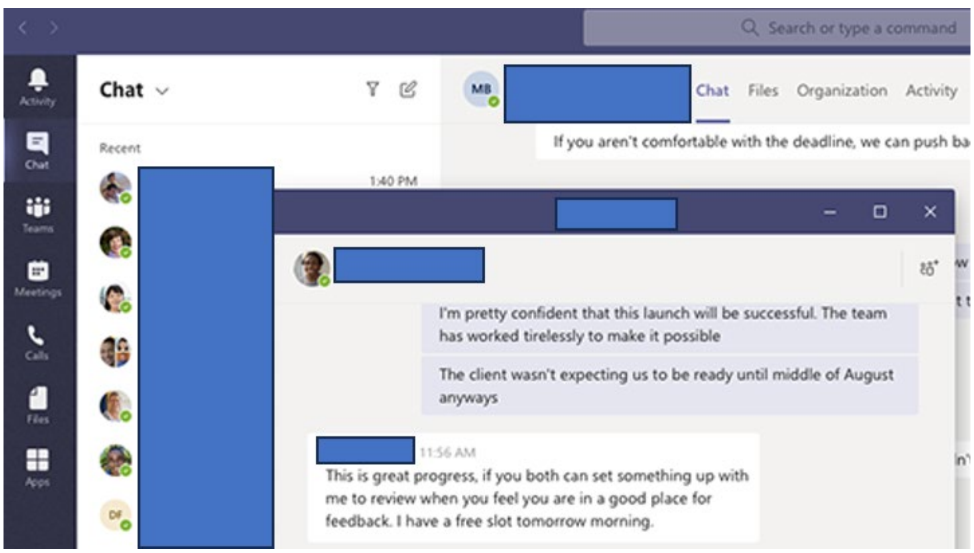
7. Chat settings

Teams Chat Overview

The MS Teams chat is turned on by default, but can be adjusted in meeting options – it will show in both the meeting window, and in the Teams app (for health authority accounts) where it will remain available outside of the meeting.

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.

- If chat is not required, it may be disabled at the time of scheduling



You cannot chat with a particular meeting guest *within* the meeting window, but you can chat with an individual *outside* the meeting window in the Teams app if you both have health authority accounts

Hover over their username in the meeting, click the chat balloon to open a separate chat using the Teams app or send a quick message.

Meeting attendees who can't access chat after a meeting include:

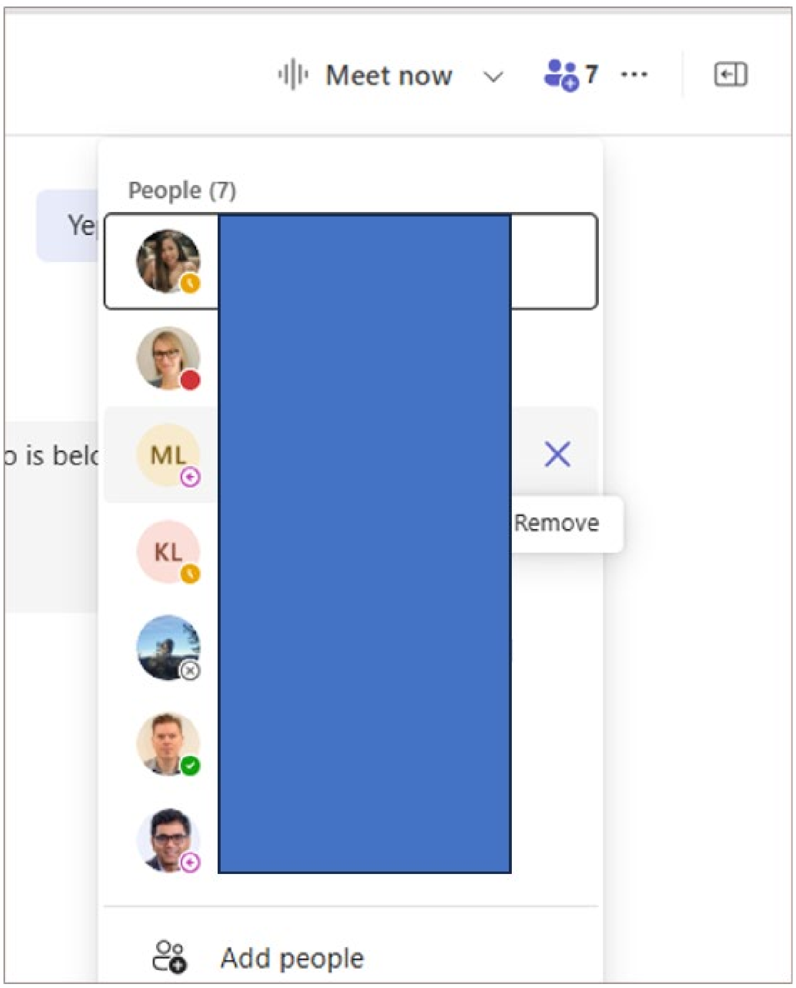
1. External or anonymous attendees not managed by a health organization.
2. Attendees who were invited to join the meeting but not by the organizer.
3. Attendees who were manually removed from the meeting chat or chose to leave.

People removed from a chat:

1. Can view previous chat history (whatever they had access to)
2. Can't send new messages, react to messages, or be able to view new conversations or files shared by the group

Remove participants from chat:

To remove people from a chat, go to the Teams app, open the chat, and in the top right, click the member icon, then the X beside the member you want to remove. (Use this process to prevent post meeting access to chat by the removed individual)



8. Accessibility

Virtual visits that require a single spoken language interpreter or Communication Access Realtime Translation (CART) will use Microsoft Teams to conduct the virtual visit.

Virtual visits that require multiple interpreters for spoken languages or American Sign Language (ASL) will remain on Zoom for the time being instead of migrating to Microsoft Teams. There will be communications and future updates to this document once PLS services are expected to migrate to Teams.

Please refer to PLS workflows found here to determine the best solution.

Request Provincial Language Services

To request interpreter services, you need a Provincial Language Services (PLS) account. If you don't have a PLS account, **contact PLS at 604-297-8400 or toll-free at 1-877-BC TALKS (1-877-228-2557)**. Providers and support staff should request an interpreter as early as possible, but services can be requested up to 15 minutes before a virtual visit. To avoid late cancellation fees, update or cancel requests at least 48 hours in advance when possible.

9. Breakout rooms

Breakout rooms

A breakout room in Microsoft Teams is a feature that allows meeting organizers to split a large meeting into smaller, separate sessions. This is useful for group discussions, brainstorming sessions, or any activity that benefits from smaller, focused groups. Participants can be assigned to breakout rooms manually, automatically, or allowed to choose their own rooms. Organizers can move between rooms to facilitate discussions. Once the breakout sessions are over, everyone can be brought back to the main meeting.

Pre-assigning breakout rooms

Note: *pre-assigning participants to breakout rooms is only available on the MS Teams desktop app. You also cannot pre-assign external participants (internal only). Additionally, pre-assigned rooms will only work if participants join from the same account that was assigned.*

1. **Open the Microsoft Teams desktop app**.
2. Navigate to the **Calendar** and locate the scheduled meeting.
3. Open the **meeting details**.
4. Select the **Breakout Rooms** tab.
5. Click **Add rooms** and specify the number of breakout rooms needed.
6. Click **Assign participants**.
7. Choose to assign participants **Automatically** (Teams will distribute them evenly) or **Manually** (you select which participants go into which rooms).
8. Enable "Let people choose their breakout room" if you want participants to self-select a room.
9. Click the **gear icon** to adjust breakout room settings, such as setting timers or allowing participants to return to the main meeting at any time.
10. After assigning participants and configuring settings, click **Save** to confirm the pre-assigned breakout rooms.

Managing breakout rooms

Here are some actions you can perform to manage breakout rooms **during the meeting**:

1. **Create breakout rooms:**
   - Click the Breakout Rooms icon.
   - Choose the number of rooms and click Create Rooms.
2. **Assign participants:**
   - Click **Assign Participants** to assign participants to rooms **manually** or **automatically** or enable **"Let people choose their breakout room"** to allow participants to select a room themselves.
3. **Start rooms:**
   - Click Start Rooms to send participants into their assigned rooms.

4. **Send announcements:**
   Click Make an Announcement to send a message to all rooms.
5. **Rename rooms:**
   Use the Room Settings (three-dot menu) to rename rooms.
6. **Adjust breakout room settings:**
   Click the Settings (gear) icon to manage:
   - Automatic movement of participants to rooms.
   - Allow return to main meeting.
   - Set timer for rooms to close.
7. **Join breakout rooms:**
   As an organizer or co-organizer, click Join Room to enter any breakout room.
8. **Close rooms:**
   Click **Close Rooms** to end sessions and return all participants to the main meeting.
   Breakout room chat history remains accessible after rooms close unless chat is disabled.

Note- Breakout rooms can be reopened if needed

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10. Conducting webinars

Webinar settings via desktop

Start the webinar

1. Double-click on the webinar in Calendar and select Join.
2. Perform any testing with co-facilitators or presenters as required.
3. Click Start Meeting (If green room is enabled) to formally start the webinar and let in attendees.

Configuring audio settings

1. If attendees' microphones were disabled during the webinar setup, you can invite them to unmute individually:
2. Hover over the screen tile of the person to be unmuted and click the ellipses.
3. Select **Enable Microphone**. This will notify the person that they can unmute to speak.

Configuring visual settings

1. If attendee cameras were disabled during the webinar setup, you can invite them to turn on their cameras individually:
2. Hover over the screen tile of the person and click the ellipses.
3. Select Enable Camera. This will notify the person that they can turn on their camera when speaking.

Record the webinar

1. If the webinar is not set to record/transcribe automatically:
2. Click the three ellipses and select Record and Transcribe.
3. Select Start/Stop Recording as needed. Note that starting a recording automatically enables transcription, but you can choose to have transcription without recording.

Note: *For now, recording is only permitted for educational sessions or vendor demonstrations.*

Engage your audience

1. Use Chat and Q&A for questions and discussions.
2. Encourage attendees to use the Raise Hand feature.
3. Launch Q&A for interaction within the audience via Meeting Options, Engagement settings.

Share your screen

1. Click Share (top-right) and select the window or screen to present content.

Using breakout rooms during webinars

Create breakout rooms:

1. Click the Breakout Rooms icon in the top menu bar.
2. Select the number of breakout rooms you need (up to 50).

Assign participants:

1. **Automatically:** Teams will evenly distribute attendees.
2. **Manually:** You can assign participants to specific rooms.
3. **Let Participants Choose:** Attendees can select their own breakout rooms.

Customize room settings:

1. Click the Settings icon and choose options like:
   Allow participants to return to the main webinar anytime.
   Set a timer for breakout sessions.

Open the rooms:

1. Click Start Rooms to send attendees to their assigned breakout sessions.
   Alternatively, attendees can join any breakout room by choosing the room and selecting Join Room.

Close breakout rooms:

1. Click Close Rooms to bring everyone back to the main webinar.

Ending the webinar

You have the option to stop the webinar for yourself or for all participants.

1. **Leave the webinar:** Click the Leave button in the toolbar.
2. **End for everyone:** Click End Meeting for All to close the session.

View the recording and materials

Access the recording:

1. If recorded, licensed users can view the recording and transcript within the meeting chat after the webinar.
2. To access/download the recording, click on the file within the chat.
3. A browser window to the host's OneDrive account will open.
4. Within OneDrive, download the recording and transcript by clicking on Download.

Manage recording in onedrive:

1. You can rename, share, or delete the recording and transcript by clicking on the three ellipses and selecting the desired option.

11. Inviting participants during an active meeting/webinar

Inviting participants to active meetings (via desktop app)

Via email

1. Click the **People** icon.
2. Select **Share invite**.
3. Click Share via default email or Copy meeting link.
4. Send the meeting link to the desired email address.

Invite someone directly.

1. Click the **People** icon.
2. In the search bar under the Participants tab, type an internal team member's name (internal being anyone within HAs) or dial a number directly to add participants.

Via meeting ID and passcode/dial-in

1. Click the **More** icon, then select **Meeting info**.
2. Click **Copy join info**.
3. Paste the join info, which includes the meeting ID, passcode, and dial-in info, and send it to the desired people.

Inviting participants to active meetings (via mobile app)

Via email

1. Tap the **People** icon at the top right.
2. Select **Share Invite** using the upward arrow button next to the search bar.
3. Choose the desired app to share the meeting link from.

Invite someone directly.

1. Tap the **People** icon at the top right.
2. Tap **Add People**.
3. Type an internal team member's name (internal meaning anyone within Health Authorities) or dial a number directly to add participants.

Via meeting ID and passcode/dial-in

Note- Sharing meeting ID, passcode, and dial-in details is not possible to do so in the mobile app

Inviting participants to active webinars

Through Teams desktop app/Outlook:

1. **Access the webinar:**
    1.1. Go to the webinar in the Teams or Outlook calendar.
    1.2. Open the meeting details by double-clicking on the webinar.

2. **Copy the webinar link:**
    2.1. Select Copy event link or directly copy the Teams meeting link from Teams or Outlook.

3. **Send the webinar link:**
    3.1. Once you have the link, send it to new attendees via email, message, or any other communication platform.

4. **Registration requirement:**
    4.1. If the webinar requires registration, attendees will be directed to register first through the copied link to receive the webinar link.

5. **Lobby enabled:**
    5.1. If the webinar has the lobby enabled, new attendees will be placed in the lobby when they try to join. The organizer can then manually admit or deny entry into the webinar.

12. Managing Teams phone

While most Teams phone management can only be done at the admin level, there are certain functionalities however that can be managed at a user level. To locate these settings:

1. **Open Teams on the web.**
2. Click the **three dots** next to your profile picture in the top right corner.
3. Select **"Settings."**
4. Click **"Calls."**

Teams phone user-level features

Call handling and forwarding:

1. **Enable call forwarding:**
   1. Toggle the switch to "On" to forward all calls.
   2. Note: Call forwarding is enabled if the toggle is purple and disabled if it is white.
2. **Choose forwarding format:**
   1. Click the drop-down menu.
   2. Select "Forward to Voicemail."
3. **Disable call forwarding:**
   1. Toggle the switch to "Off."
4. **Additional call handling features:**
   1. Under the drop-down menu for each feature (e.g., "When you receive a call," "When you can't answer a call," "Ring for this many seconds before redirecting," "Choose a ringtone"), select the desired settings.

Managing voicemail:

1. **Record a custom greeting:**
   1. Select "Record a Greeting."
2. **Choose default greeting language:**
   1. Click the drop-down menu.
   2. Select the preferred language.
3. **Set voicemail handling:**
   1. Select the drop-down menu.
   2. Choose the preferred setting.
4. **Set up text-to-speech customized greeting:**
   1. Type in your custom greeting message.

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Managing out-of-office voicemails:

1. **Select greeting playback time:**
    1. Click on the appropriate checkboxes to choose when your greeting will be played.
2. **Set a custom greeting:**
    1. Type your greeting message into the text box.

Managing call groups:

1. **Add a call group:**
    1. Click "Add a Call Group."
    2. Type the user's name into the text box.
    3. Call group members can receive calls on your behalf. Select members to be in your call group and forward calls to them as needed.

Managing delegates:

1. **Add a delegate:**
    1. Click "Add a Delegate."
    2. Type the delegate's name into the text box.
    3. Delegates can make and receive calls on your behalf. They will be notified when you change call settings to send your calls to them.
2. **Configure delegate permissions:**
    1. Go through the list and check/uncheck the settings that you want/do not want your delegate to be able to manage.

Adding a participant to the call

1. Open the Microsoft Teams Desktop App or the Web-based version.
2. Click on "Calls."
3. Enter the phone number of the participant you wish to add on the dial pad.
4. Press "Call."

Transferring a call

1. Click the transfer icon or "Consult then Transfer" on the screen.
2. Enter the phone number or name of the individual you wish to transfer the call to.

    Note: *The individual is only searchable by name if they are an internal PHSA user in our contact directory.*
3. Press "Transfer" or "Chat" (if using "Consult then Transfer").
    1. **Consult then Transfer:** This feature allows a user who has received an incoming call to chat with another individual before transferring the caller.
    2. Note: "Consult then Transfer" is not available in Teams for the web.

Putting a user on hold

1. Click the "Hold" button on the screen.
2. Click the "Resume" button to pick up the call again.

Merging calls

1. When the second call connects, click on the three ellipses (more options) on the screen.
2. Click "Call Merge."

Note: *When merging calls, the first call will automatically be put on hold when you make another call. Alternatively, during the first call, you can click on the hold button before making another call. Call merger is not available for shared line calls and is only supported on the Teams Desktop client.*

Parking calls

1. During the existing call, click the three ellipses (more options) on the screen.
2. Choose "Call Park."

Note: *After parking the call, Teams will provide you with a unique code to retrieve the call. If someone else is retrieving the call, copy the code and share it with them.*

Resuming a parked call:

1. Navigate back to the Microsoft Teams App.
2. Click the "Calls" symbol.
3. Select "Parked Calls" (located below the dial pad on the screen).
4. Enter the park code and select "Pick Up."

13. Room-based videoconferencing

If your video conferencing room is teams enabled, here are the steps for connecting the room to your MS teams meeting.

How to connect the room to your MS Teams meeting

Tap the touch panel to wake up the system. Allow it time to warm up and turn on.

Connect the room to your MS Teams meeting:

Option 1: send a Teams meeting invitation to the room mailbox

1. Include the room mailbox address as an attendee in your Teams meeting invitation from Outlook.
2. Scheduled meetings for today will appear on the display and touchpad. Click the **Join** button next to your meeting to connect the room.

Option 2: invite the room to an in-progress Teams meeting

1. From within the Teams meeting on your device, click on **People**.
2. Type in the room name and click **Request to Join** to ring the room.
3. A participant in the room will need to accept the incoming call on the touchpad.

Option 3: join using the meeting ID and passcode

1. Click **Teams Call** on the touchpad.
2. Enter the Video Conference ID found in your Teams meeting invite.
3. Press **Call**.
4. The room will be placed in the Teams Meeting lobby until a participant in the meeting admits the room.

Option 4: Start an ad-hoc Teams meeting

1. Press the **Meet now** button on the touchpad to start a Teams meeting.
2. Once in the meeting, use the search bar on the touchpad to search for participants to invite. As you type, suggestions from the Global Address Book will appear. Click on the person you wish to dial, and it will ring on their Teams app, asking them to join.

14. Resources

General guidelines

Video visit guidelines can be found here- (*Link to be added).*

***Note-** Additional resources to come.*

Troubleshooting

What should I do if I encounter issues with computer audio in MS Teams?

1. Ensure your microphone and speakers are properly selected in Teams' Audio and Video settings.
2. Restart your device or MS Teams if the issue persists.
3. Switch to phone audio using the dial-in information in the meeting invite as a fallback option.
4. If problems continue, submit a ticket to the Service Desk.

How do I troubleshoot MS Teams calendar sync issues?

1. Ensure you're signed into both MS Teams and Outlook with the same account.
2. Restart both applications to trigger a calendar resync.
3. If the issue continues, try accessing Outlook through a web browser.
4. If the problem persists, contact the service desk for further assistance.

Can I schedule a meeting on behalf of a shared mailbox in MS Teams?

Yes, you can schedule a meeting on behalf of a shared mailbox, but you need to have full access and send as/send on behalf of permissions for the shared mailbox.

1. Use the Teams plug-in in Outlook to create the meeting.
2. Select the clinicians as the co-organizers.

Frequently asked questions (FAQs)

How can I make MS Teams more stable?

Use the desktop app: The desktop version is more stable and performs better than the web version.
Update Teams regularly: Ensure you're using the latest version for bug fixes and performance improvements.
Optimize your internet connection: A wired connection is preferred, but if using Wi-Fi, ensure a strong signal.
Limit background apps: Close unnecessary applications running in the background to free up system resources.
Turn off video if necessary: Disabling video can improve call stability during poor network conditions.
Use a wired internet connection if possible: This can help provide a more stable and faster connection.
Avoid using Chrome simultaneously if possible: Running multiple applications can slow down your system.
Reduce the number of open tabs: Too many browser tabs or apps open can reduce system performance.
Disable VPN if not required: A VPN can slow down your connection; disable it if it's not necessary for your work.

Can I record meetings and have transcripts in MS Teams?

MS Teams can record meetings and provide transcripts, but this is not approved for most use cases within PHSA except for educational sessions and vendor demonstrations.

Note: *For questions specific to your use case, please contact your privacy office.*

Can I download only audio from my Teams recordings?

No, Teams recordings are available as video files, and there's no option to download only the audio.

Are closed captions available in MS Teams?

Yes, closed captions can be enabled in meetings, but they are not recommended by Provincial Language Services (PLS).

What's the difference between resource calendars and shared calendars?

Resource Calendars: Used for booking shared resources like meeting rooms or equipment.
Shared Calendars: Designed for collaboration, allowing multiple users to view and manage events collectively.

What should I consider while pre-assigning breakout rooms?

Participant Changes: Update assignments if the participant list changes after pre-assignment.
Account Consistency: Participants must join using the account associated with their invitation for accurate placement.
Organizer-Only Feature: Only the meeting organizer can pre-assign breakout rooms; co-organizers currently cannot.
Internal Users Only- You will only be able to assign internal users to breakout rooms prior to the meeting.

Can I use private chat in MS Teams meetings or webinars?

Direct private chats within the meeting interface are not available.

Workarounds:

1. **Switch to Teams:** Send a private message through the Teams app.
2. **Hover over the participant's video tile:** Select the chat icon to send a message, but this will open a separate chat outside the meeting.

How do I set up authenticator?

1. Install Microsoft Authenticator from the App Store or Google Play.
2. Open the app → Tap **"+" (Add account)** → Select **"Work account"** → Choose **"Scan QR code"**.
3. On your computer, go to https://aka.ms/mfasetup and sign in.
4. Select **"Authenticator App"** → Click **Next** → Scan the QR code with the app.
5. Approve the test notification to complete setup.

After assigning a delegate, we do not receive our meeting invitations. What's the fix?

1. Click on https://outlook.office.com/calendar/view/workweek and log-in to your Outlook Web (if prompted)
2. In the left panel, under "My Calendars," click the three dots (More Options) next to "Calendar."
3. Select "Sharing and Permissions"
4. Under "Delegates", find your delegate's name, and make sure the dropdown next to it is set to "Both my delegate and me." This ensures both you and your delegate will receive meeting invitations.

Can I edit the automated registration emails in Teams basic webinars?

No, automated emails cannot be modified in Teams basic.

Can I let people choose their own breakout rooms?

Yes, when you create breakout rooms, you'll see three options: assign rooms automatically, manually, or allow people to choose their own rooms. Select the third option to let participants choose.

Can I share a presentation to all breakout rooms?

No, Teams doesn't currently support sharing a presentation to all breakout rooms simultaneously.

How can I get access to Polls?

As long as you do not collect any Personal Health Numbers (PHN) or Personal Health Information (PHI), you can submit a request for the Polls add-on app at this link.

Is it possible to move Clients/participants in and out of the lobby from the main call?

No. (Breakout rooms can be a suboptimal workaround.)

Is it possible to message to the lobby?

No, you cannot send messages to the lobby in Microsoft Teams.

Can an audio call be transitioned to a video call?

> Internally, **yes.** (In the chat window, click the dropdown in the top right (video icon), start an audio call, then turn on your camera.)
>
> For guests/Clients, **no.**

Can meeting invites be sent to Clients/participants via email and SMS text from within the application?

Via email, **yes.**
Via SMS, you will need to use **Teams Premium** and **Virtual Appointment appointment type** (Delegation is not possible with this type).

Are recordings and transcriptions enabled on MS Teams? If not, how can I turn them on?

Recordings and transcriptions are not permitted in MS Teams, except for educational sessions that cannot be attended by all.

To enable them for educational sessions, click on the three dots ("More") and select **Start recording** or **Start transcription** as required.

How do I set up meeting lobbies in meetings so that I can admit participants one by one?

While scheduling meetings, click on **"More Options"** or **"Meeting Options"**, and under **Who can bypass the lobby**, select **Only organizers and co-organizers**. Click **Save** before sending the invite.

Can I share the Teams recordings (for educational sessions) externally?

No! You can only share Teams recordings internally (within Health Authorities).

Can I set up and customize automated reminders in Microsoft Teams?

For internal users, reminders can be set via Outlook with customizable reminder times. However, automatic reminders are not available for guests.

For more FAQs you can visit the following web link: **CTIS Digital Hub**

Related documents

- Additional resources to be customized for PHSA- https://shop.healthcarebc.ca/vch/VCHDSTs/D-00-07-30315.pdf

Glossary

- **Virtual Visit:** A technology-enabled remote interaction between providers, provider(s) and patient(s), and patients and families to address the patients' health.
- **Corporate Desktop:** A desktop computer provided by PHSA for work-related tasks, typically configured with necessary software and security settings.
- **Corporate Laptop:** A portable laptop issued by PHSA, equipped with work-related software and security protocols for remote or on-site work.
- **Corporate Mobile Devices:** Mobile phones or tablets provided by the company for employees to use for work purposes, typically secured for business communications and tasks.
- **MS Teams Rooms:** A dedicated meeting space equipped with Microsoft Teams software and hardware, designed for seamless virtual meetings and collaboration.
- **Non-MS Teams Rooms:** Meeting rooms or spaces that are not equipped with Microsoft Teams but may use other video conferencing software or tools.
- **Webinars:** Online seminars or presentations typically hosted for a larger audience, where presenters share ideas or providing training to the audience. Attendees may be required to pre-register and audience interaction may be limited to Q&A or chat.
- **Instant Meetings:** Ad-hoc, spontaneous meetings initiated immediately without pre-scheduling, typically through MS Teams or similar platforms.
- **CART (Communication Access Realtime Translation):** A service that provides real-time transcription of spoken words, often used to assist people who are Deaf or hard of hearing.
- **Internal Participants:** Individuals from all Health Authorities (HAs) who have access to Microsoft Teams within the organization.
- **External Participants:** Individuals who have Teams accounts outside of the Health Authorities (HAs).
- **Guests (also referred to as Clients):** Individuals without Teams accounts, typically invited to meetings as external users.