

Virtual visit cheat sheet (Microsoft Outlook)

Clinician resource

This document is intended to give a high level overview of what is needed to conduct a virtual visit start-to-finish.

Microsoft Outlook and Microsoft Teams are integrated with one another. Outlook will be used to schedule virtual visits and Teams will be used to conduct the visit.

Installing and logging in (Microsoft Teams):

1. The Microsoft Teams app will automatically be installed on corporate devices.
2. Open the MS Teams App and **log-in via SSO**. Allow the pop-up on your Microsoft Authenticator app (if required).

Assign a delegate:

1. Go to Microsoft Outlook and log in.
2. Select the calendar and choose **Share Calendar** from the toolbar at the top.
3. In the **Permissions** tab click **“Add”** and search for the person you would like to share with.
4. Click **“Add”** and then **“Ok”**.
5. The person will now appear in the **‘Currently sharing with’** window.
6. Select the person from the window and choose **‘Delegate’** from the permission options.
7. Click **“Apply”** to save the changes.

Schedule a virtual visit:

1. Go to Microsoft Outlook and log in.
2. Go to the **Calendar** tab.
3. Click on a time slot and choose **Teams Meeting** from the toolbar at the top.
4. Add the patient’s name, email, and any notes in the email section. 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.
5. Click **Send** to book the meeting.

Please Note: if you don’t see Teams Meeting in your toolbar during step three, go to: **Options > Add-ins > Go** and make sure **‘Microsoft Teams Meeting Add-in for Microsoft Office’** is checked.

Joining the virtual visit:

- Locate the virtual visit appointment in your Microsoft Outlook calendar:
 - Once you’ve located the meeting click the **Join the meeting now** button.
- Microsoft Teams will open and you can check your audio and video settings.
 - **Select your camera and audio** source
 - **Blur or change your background** (optional)
- Click **Join Now** to begin the meeting.

Please note: you also have the option to join the meeting by calling the dial-in meeting ID provided in your meeting invite and enter the phone conference ID

