

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.

Note: this QRG refers to scheduling in Outlook. If you are scheduling using the Teams app please refrain from using the virtual appointment template for virtual visits with patients.

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

Scheduling group virtual visits

For specific guidance on how to schedule a group visit with patients click [here](#) to review virtual visits with multiple participants.

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.

Microsoft Teams Meeting

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

Dial in by phone

Meeting options window

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

Meeting Options

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

Announce when people dialing in join or leave

Require unverified participants to verify their info before joining
When this is on, unverified participants will need to sign in or verify their emails with a code before joining the meeting. Your license and admin policy also determine how they'll join.

Save

You can quick jump to different sections by selecting the tabs on the left hand side.

Privacy recommendations

Privacy has recommended meeting options that need to be configured for all meetings. We will discuss every setting that needs to be configured on the **next page** 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.

Other than the above recommendations from Privacy, 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.
2. **Who can present** select **“Only organizers and co-organizers”**.
 - This will disable screen sharing for participants.

Participation

It is recommended by Privacy 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

Privacy recommends that **‘Allow Copilot’** be set to **“Off”**. Once this is done, **“Who can record and transcribe”** will also be set to **‘No one’** automatically.

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

The screenshot shows the 'Meeting options' settings page in Microsoft Teams. The 'Meeting access' section is highlighted with a red box, showing the 'Meeting access' dropdown set to 'Only organizers and co-organizers'. Below it, the 'Who can bypass the lobby?' dropdown is also set to 'Only organizers and co-organizers'. The 'Who can admit from the lobby?' dropdown is set to 'Organizers and co-organizers'. The 'Roles' section is highlighted with a red box, showing the 'Choose co-organizers' dropdown set to 'Search for participants'. The 'Participation' section is highlighted with a red box, showing the 'Allow mic for attendees' and 'Allow camera for attendees' toggles turned on. The 'Meeting chat' dropdown is set to 'Off'. The 'Who can record and transcribe' dropdown is set to 'No one'. The 'Copilot and other AI' section is highlighted with a red box, showing the 'Allow Copilot' dropdown set to 'Off'. A 'Save' button is visible at the bottom right of the settings page.