

Microsoft Teams: Virtual visits with multiple participants



In addition to one-to-one virtual visits, there may be times when a meeting with multiple participants (a group virtual visit) is needed.

Before the meeting

Clinicians will need to **Bcc each patient when sending a meeting invitation to not expose their email to other participants**, and include Health Organization relevant collection notice in the meeting invitation. They will also need to let patients know their name and/or email might be visible to other participants during the meeting.

Formal patient identification is required when the patient is being documented on in their patient health record and when individualized treatment or care is discussed or provided. Identification requirements may also vary based on specific program requirements. If there is any uncertainty, please consult your Privacy Office.

Please note: that webinars have not been approved to be used when scheduling a group virtual visit.

Working with multiple clinicians

If multiple clinicians need to communicate with each other during a group visit, they must use a **separate chat within Teams instead of the meeting chat**. In the case of functions that are required for a clinical purpose, the relevant information needs to be **copied into a patient's chart and promptly deleted from MS Teams**. In the case of files shared in MS Teams, those files must also be deleted from the user's OneDrive.

Document sharing should be disabled as recommended by Privacy. If clinicians need to share clinical documents, they must use the Health Organization's email or another approved method of sharing.

Regarding the use of Polls and Forms

The Polls and Forms function of Teams should be disabled automatically. Polls and Forms store data in the United States which may result in identifiable Personal Health Information being stored outside of Canada. Because of this, **It's very important not to use polls and forms**. Clinicians should check their professional obligations with their practice team and regulatory College.

Teams Premium for Group Health Visits

MS Teams Premium lets you set up meeting templates ahead of time. This means your preferred settings are applied automatically, so you don't have to make as many changes each time. This creates less need for admin controls or extra training for clinicians to follow Group Health Visit recommendations.

Teams Basic for Group Health Visits

If MS Teams Premium is not available for group virtual visits, Privacy recommends you configure these meeting options using MS Teams Basic to help protect patient privacy and meet professional standards.

Turn off these features:

- Meeting Chat > set to 'Off'
- Allow Copilot > set to 'Off'
- Who can record and transcribe > set to 'No one'

Turn on these features:

- Who can bypass the lobby? > set to 'Only organizers and co-organizers'
- Who can admit from the lobby? > set to 'organizers and co-organizers'

For questions or needs specific to your use case, please contact your Privacy Office.