

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. This document will explain important privacy considerations and meeting settings for a group virtual visit.

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 participants know their name and/or email might be visible to other participants during the meeting if they have joined using a Microsoft account. A patient's email will not be visible when joining as a guest.

Per PHSA privacy, 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.

PHSA virtual group participation notice

All programs performing group visits should be sending the PHSA Virtual Group Participation Notice or a program equivalent in the **body of the email** to patients along with the meeting link. This should also be **reiterated at the start of the group meeting to all participants**.

- Please note sharing in a group session about your health or condition may reveal personal information to others in the group.
- For your privacy and confidentiality, avoid including personal health information, sensitive information (e.g. personal medical information), or any identifying details that you do not want to disclose about yourself in the chat.
- By joining us online at the meeting link emailed for this session, you are agreeing to participate in a virtual group meeting knowing that by nature this group meeting is not an entirely anonymous session.
- Unless the clinic/program requires otherwise, you may use your first name or join anonymously.
- Please log in from a quiet, private location.
- No recordings are permitted.

Using webinars

Webinars are approved for use during a virtual visit. Please see the PHSA [Microsoft Teams Playbook](#) for specific information.

Using polls and forms

MS Teams Polls and Forms can only be used for communication that does not include personal information or personal health information. Polls and Forms store their data in the United States. This means personal health information (PHI) could be kept outside of Canada. When deciding to use these tools, keep in mind that data from Teams Polls and Forms is stored in the U.S. If Polls or Forms are required (e.g. for engagement), avoid questions that could reveal personal information or personal health information. Consult with the privacy office if you have any questions.

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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.

Teams Basic for group 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'
- Who can present > set to 'organizers and co-organizers'