

# Training on the use of Microsoft Teams



## Table of contents

Section 1 - Clinical .....	3
Section 2 - Technological.....	5
Section 3 – Safety and confidentiality.....	12
Section 4 – Other.....	14

## Section 1 - Clinical

1. **Could you revisit completing notes in patient files? Will each establishment have its own procedure?**

Microsoft Teams is a tool for communication and collaboration between the professional and the patient. It does not replace the clinical information system.

The rules for completing notes in patient files remain the same as those determined by your professional order. In the case in which a professional does not have access to their usual tool for patient files (Electronic Medical Record, computerized clinical file, paper file or other) to complete his/her note in the file, the procedures to be followed should be verified with the competent authority until access to the tool is regained.

2. **What's the difference between a Teams consultation and a telephone consultation, if the patient does not see me?**

“When telephone consultation is not a sufficient measure, virtual care via telehealth can be an effective alternative solution for interactions with patients during the COVID-19 pandemic.” – Telehealth section of Quebec Health and Social Services Network (RSSS) website (<https://telesantechum.ca/Reseauquebecoisdelatelesante/bonnepratique.html>)

3. **Is the exchange of documents (e.g. photo of a patient's wound) during a Teams conversation between two intervention workers considered safe?**

Yes, because from a safety standpoint, the information technology department of the Ministry of Health and Social Services recommends use of the three teleconsultation tools (Zoom, Reacts, Microsoft Teams) that meet the safety criteria required for clinical use after performing all necessary analyses. These tools are intended to be complementary to other already existing telehealth in the Quebec Health and Social Services Network (RSSS).

However, the clinical note must be found in the patient file and the photo must be included. Teams does not act as a patient file. It is important to include the following in the note:

- Confirmation that the sharing of visual information was made between professionals or during a follow-up meeting with the patient;
- Ensure that the screenshot does not allow for the identification of the patient;
- Confirmation that the patient consents to and accepts the sharing of this photo during a discussion with another healthcare professional.

- 4. If I need to provide group education, which requires inviting multiple patients, do I have to invite each patient individually or can I invite them as a group while ensuring their confidentiality?**

Multiple patients can be invited to the same meeting. Their names will be displayed according to what they entered in the window to join the meeting. For example, if the patient entered « Michel Bouchard » to identify themselves, the other participants will see this name in the list of participants.

- 5. If the meeting facilitator removes a patient from the waiting room accidentally, can the patient reconnect to the meeting?**

Yes. To do this, the patient must return to the appointment invitation email or to the invitation in their calendar and click on « Join the Teams meeting » to reconnect and join the meeting again.

## Section 2 - Technological

1. **If a meeting exceeds the planned duration, will it end automatically?**

No, there are no restrictions. There is no time limit for the meeting; it will not end automatically.

However, if the meeting exceeds the planned duration, the intervention worker can pause the first meeting to mention to the next patient that their meeting will take place in a few minutes and return to the first meeting to complete it.

Please note that you can only join one meeting at a time.

2. **Why is it necessary to enter Teams as well as Outlook?**

The Teams tool is one of the collaborative tools of the Office suite, along with Outlook and many others. Teams and Outlook are therefore accessible by the same Office portal, with the same email address.

Teams and Outlook have different functions. Outlook is ideal for managing the invitation, while the managing of the meeting itself takes place in Teams.

3. **Do we have to add the Teams calendar to our Outlook calendar?**

The Teams calendar is synchronised with that of Outlook. because both are part of the tools of the Office suite. The adding, updating or deleting of an event in one of the two calendars will automatically be reproduced in the second. In other words, these are the same calendars.

4. **Is it possible to join the meeting using a cellphone?**

Yes, the intervention worker or user who wishes to join a meeting must download the Microsoft Teams app on their cellphone. It is impossible to access the Web version of Microsoft Teams on a cellphone.

Please note that Microsoft is currently looking into the possibility of sending invitations either by email or by phone.

5. **Does the patient need to create a Microsoft account to use Teams?**

No. If a patient is using a computer, they do not need to create a Microsoft Teams account to connect to a meeting. All they have to do is click on the link in the invitation.

If a patient is using a mobile device, they must download the Teams app, but still do not need to create an account. Once the app is downloaded, all they have to do is return to the invitation email to click on the link that allows them to join the meeting.

6. **Is it possible to use an Apple-type personal computer for the teleconsultation?**

Yes, a Teams app is available for Mac users.

We invite you to consult your institution's policies to find out the rules for using your personal computer in the context of your work.

7. **Is it possible to use an account shared with different professionals if we are following the patient together?**

Yes, it is possible to schedule meetings with an Office 365 account, whether it is an individual or shared account.

However, it is strongly recommended to use an individual Office account to join meetings.

In the coming weeks, all employees of the Health network will receive an individual professional Office account.

8. **Does the assistant need to have an Outlook account?**

Yes, the administrative assistant must have an Outlook mailbox to be able to manage the invitations of the intervention workers. They must also have the required authorizations to modify the intervention worker's calendar.

In the coming weeks, all employees of the Health network will receive an individual professional Office account.

Please note that the assistant or the person who scheduled the meeting is not required to activate the waiting room or to start the meeting. The intervention worker can do so even if they did not send the invitation.

9. **In a training context, is it possible to share files with a group or to administer a quiz and to see the participants' results (in the form of a graph or percentage)?**

Microsoft Teams lets you share files and make them visible in your team's channels using the Files **tab**.

However, the rules on use of this tab will be updated and extensions will be available in Teams, such as the Forms extension which allows you to create surveys. The Ministry of Health and Social Services is currently reviewing certain details concerning these rules.

10. **Do we need to install Teams in our Outlook, or will it be installed automatically after this meeting?**

No installation is required. Outlook and Teams are tools of the Office 365 suite and can be accessed on the Web. To access Outlook: <https://outlook.office.com/>. To access Teams: <https://teams.microsoft.com/>.

In the coming weeks, all employees of the Health network will receive an individual professional Office account.

11. **I have not installed Office 365 on my computer. How can I access Outlook?**

You can access Office 365 using the following link: <https://products.office.com/en-ca/home>.

Please note that some Web browsers have limitations for accessing Office 365; Chrome is the best web browsers to support Office 365.

12. **Is there a maximum number of participants for a Teams meeting?**

Yes, 250.

13. **Is it possible to use a virtual waiting room to make invited participants wait before a meeting?**

A waiting room is available on Teams. However, please note that its management is slightly different depending on the platform that you are using (Web version of Outlook or desktop app). In the Web version, you must record the meeting before having access to the options that allow you to manage the waiting room, while you have access to these options directly when you create the meeting on the desktop app.

14. **We don't have a single administrative agent, but several clerks who handle appointments. Can we share our full calendar at the appointment office?**

Yes, this is possible. Information can be found in the webinar presentation (in video or PDF format), available in French on the Quebec telehealth network website:

<https://telesante.quebec/guideteams/professionals-training-fr.html>.

**15. Is it possible to connect before a meeting or to extend it after the scheduled end?**

Yes, the meeting is always accessible. Teams does not end a meeting and does not prevent access to it before the scheduled start of the meeting.

**16. What is the name of the app the client has to download?**

If they are using a computer, the patient does not have to download an app because they will be using the Chrome or Edge browser. If they are using a mobile device, they will be asked to download Microsoft Teams. The following link will appear when they click the invitation to join the meeting: <https://www.microsoft.com/fr-ca/microsoft-365/microsoft-teams/download-app>.

**17. Is it possible to record a meeting?**

Yes, it is possible to record a meeting. The right to record is determined according to the type of user (organiser, member of the organization, invited or anonymous participant). Please note that anonymous participants cannot start recording a meeting. For more information about the recording feature in Teams, please visit the following Microsoft website: <https://support.microsoft.com/en-us/office/record-a-meeting-in-teams-34dfbe7f-b07d-4a27-b4c6-de62f1348c24?ui=en-us&rs=en-us&ad=us>

**18. How can we delete a conversation?**

Conversations in Teams cannot be deleted. However, conversations can be hidden so that they no longer appear in your conversations. For more information, please visit the following Microsoft website: <https://support.microsoft.com/fr-fr/office/masquer-%C3%A9pingler-une-conversation-ou-en-d%C3%A9sactiver-le-son-dans-teams-9aee02ef-713d-495b-8a73-9762d8e4b066>.

**19. Is it possible to use Teams to share documents with someone from the outside, like a patient who wants to send us a video?**

During a virtual meeting with a patient, the only file that can be shared is a photo. However, the patient could present a live video. They could, for example, be filmed performing a physiotherapy exercise during a meeting.

**20. Is it possible to add someone to a team who has a Teams account but is not part of the Quebec Health and Social Services Network (RSSS)?**

Yes, it is possible to invite someone outside the organization, therefore outside the RSSS. This request should be addressed to the Teams administrator of your institution. However, the actions of an invited Teams participant are restricted. For more information about these restrictions, please visit the following page: <https://support.microsoft.com/en-us/office/team-owner-member-and-guest-capabilities-in-teams-d03fdf5b-1a6e-48e4-8e07-b13e1350ec7b?ui=en-US&rs=en-CA&ad=CA>

**21. Is it possible to upload training videos to Teams?**

Videos can be uploaded in a Teams channel or conversation. However, the use of Microsoft Stream is better suited to uploading and viewing video content. For more information, please visit the following Microsoft website: <https://www.microsoft.com/fr-ca/microsoft-365/microsoft-stream>.

**22. Is it possible to set backgrounds when using the camera?**

Yes, it is possible to change your background when your camera is activated. This option is currently only available for the desktop Teams app. For more information, please visit the following Microsoft website: <https://support.microsoft.com/en-us/office/change-your-background-for-a-teams-meeting-f77a2381-443a-499d-825e-509a140f4780?ui=en-US&rs=en-CA&ad=CA>

**23. When recording a Teams meeting, is there a function to transcribe the content of a video?**

There is no tool allowing the direct transcription of the content of a recorded video to a clinical tool, nor a tool allowing for the verbatim transcription of a meeting. A closed captioning feature is available for live conversations (only available in English).

**24. Do I need to buy Office 365 to use Teams on my Mac?**

No. You can use Teams on Mac by downloading the app for free or by using the Chrome browser. You simply have to use the Office 365 account created for you by your institution to connect.

**25. In the context of telework. Can I access the Microsoft suite of the CHU from my Mac desktop computer at home?**

We invite you to consult your institution's policies to find out the rules for using your personal computer in the context of your work. On a technical level, Teams can be used on a Mac by downloading the app for free or by using the Web version on the Chrome browser.

**26. Can we invite a participant with their cellphone number (instead of an email address)?**

This option is not currently included in the Office 365 contract with the Ministry of Health and Social Services.

**27. Do the institutional Teams administrators need to validate the email addresses of the patients before the professional can organise a virtual meeting?**

No, patients' email addresses do not need to be validated in order to organise virtual meetings.

**28. Does the waiting room always have a time limit of 15 minutes?**

No. Since May 2020, the time limit of the waiting room is 30 minutes.

**29. Does a Teams meeting use mobile data if the user participates on their cellphone?**

If the user participates in a Teams meeting on their cellphone and does not have access to a wireless network (wifi), then yes, this will use the mobile data from their cellphone plan. It is good practice to inform participants of this before a meeting.

**30. I have two Outlook email addresses: one with the university and the other with my healthcare institution. Could I use both of these simultaneously?**

On the Teams mobile app, it is possible to use two accounts without having to authenticate them each time. However, they cannot be used simultaneously; you must select the account you wish to access from the list of accounts. On a computer, it is possible to connect to one account on the desktop app and to another on the web browser (Chrome or Edge).

**31. Is a specific web browser (ex. Google Chrome) preferred for use with Teams?**

Chrome and Edge are the preferred browsers to allow for optimal use of Teams.

**32. The Teams app does not seem to be available on Mac. Is this correct?**

The Teams app for Mac can be downloaded by following the guidelines for Apple products at the following website: <https://www.microsoft.com/fr-ca/microsoft-365/microsoft-teams/download-app>. However, please note that no installation is required to use Teams. Outlook and Teams are part of the Office 365 suite tools and are accessible via a web browser (Chrome or Edge). To access Outlook: <https://outlook.office.com/>. To access Teams: <https://teams.microsoft.com/>.

**33. Can we take screenshots via the Teams app?**

No, this feature is not yet available in Teams. Screenshots must be taken via another app.

**34. Can I create a channel?**

Guidelines for managing Teams are specific to each institution. For more information, please contact the individual responsible for managing Teams deployment for your institution.

**35. Can the settings that allow members of my organization to skip the waiting room be programmed by default for my user account?**

No, currently it is not possible to program a setting by default for a specific account. The setting is programmed for the organization and applies to all users.

**36. Is it possible to give control of our computer mouse to another person?**

Yes, it is possible to give control of the screen you have shared to another member of your organization who is taking part in the same meeting. However, in the context of a teleconsultation, the patient will be able to see the screen that you share with them but will not be able to take control. For more information, please visit the following Microsoft

website: <https://support.office.com/fr-fr/article/partager-du-contenu-dans-une-r%C3%A9union-avec-teams-fcc2bf59-aecd-4481-8f99-ce55dd836ce8>.

## Section 3 – Safety and confidentiality

1. **I'd like to hear more details about the confidentiality of the data (e.g. sharing of patient data, agenda with patient names or file numbers). The latest information I've received indicates that only Zoom and Reacts have been authorised by the Ministry with respect to data security. Perhaps I'm mistaken?**

Teams, Reacts and Zoom are the technologies that meet the safety criteria of the Ministry.

2. **Do I have to set a password when I invite a patient or colleague to ensure confidentiality, like in Zoom?**

No, there is no password to enter in order to connect to a meeting. The Ministry of Health and Social Services is currently looking into this possibility with Microsoft.

3. **The presenter just mentioned that confidential files shouldn't be shared via Teams. However, in the Ministry's bulletins, it is mentioned that this is authorized if no process or tools are provided for this purpose. Could you please clarify?**

Microsoft Teams is a communication and collaboration tool that allows a professional to share with his/her patient. It does not replace the clinical information system or any other mission system. « Thus, the information transmitted via the Office 365 suite must still be integrated, when relevant, into these systems (for example, the patient's file). » - Telehealth Bulletin #24

The **Files** tab in Microsoft Teams can, however, be used for more administrative purposes, to store documents that may be useful to other members of your team.

4. **What type of risk does the patient face regarding privacy? What should we tell them?**

For more information on this subject, we invite you to consult the “**Bonnes pratiques**” (section of the website of the Quebec Telehealth network ([telesante.quebec](https://telesante.quebec); only in English)

5. **Is Teams safer than Zoom (in terms of confidentiality or the risk of people entering the meeting)?**

Teams, Reacts and Zoom are the technologies that meet the safety criteria of the Ministry.

6. **I saw that the use of a personal computer or mobile device is not recommended, is this correct? Is there any way to overcome this drawback, given the low availability of equipment in the network?**

The use of Teams on personal devices (computer, cellphone, etc.) meets the safety criteria of the Ministry. It is therefore permitted. Please contact your organization's telehealth pilots for more information on this subject.



## Section 4 – Other

### 1. Are all physicians and specialists in Quebec connected with Teams?

All physicians affiliated with the Federation of Medical Specialists of Quebec (FMSQ) and the Federation of General Practitioners of Quebec (FMOQ) working in healthcare institutions have or will have access to Teams. Many FMG physicians already have access to EMR, including teleconsultation tools certified by the Ministry of Health and Social Services.

For more information, please consult the Telehealth Bulletin #20.

### 2. Can we create teams ourselves?

Teams in Microsoft Teams cannot be created by users. Each institution is responsible for the creation and the structure of teams and must comply with the nomenclature established by the Ministry of Health and Social Services. Communication channels within teams, however, can be created by users.

The user can also create a group conversation. To do this, click on the pencil icon in the Chat tab, then add the people you want to include into the input field.

### 3. Is documentation available to guide the user during a teleconsultation with Teams?

Yes, the documentation is available in French on the following website of the Quebec Telehealth Network: <https://telesante.quebec/guideteams/index-fr.html>.