

Instructions: Scheduling Groups in MS Bookings




Schedule the patient appointment in **PHS first to maintain link to all downstream systems (EPR, myUHN Patient Portal, etc.)**. See: [Initial Virtual Clinic Set Up and Patient Scheduling Process](#) (Departments>Telehealth>Resources>Virtual Care Toolkit)

1. Open MS Bookings calendar

- a. Launch MS Bookings via Office365. Visit www.office.com > Click on Bookings



Please note: UHN Virtual Group Patient appointments **cannot** be schedule through the MS Teams app

- b. Enter clinic name (e.g., UHN Toronto General – ES Team Testing)
 c. Click on Calendar  Calendar

2. Create a New Booking

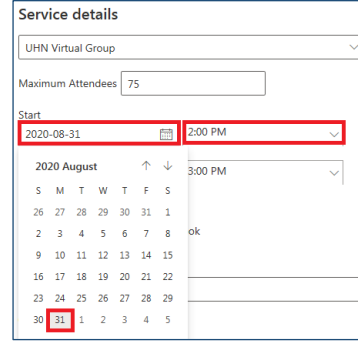
- a. Click on New Booking > UHN Virtual Group

3. Enter the appointment details

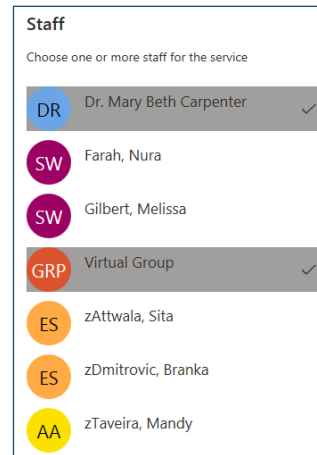
- a. Enter patient details for the **First Patient** in the Virtual Group appointment under **Customer information**

<p>Customer name:</p> <p>Customer email:</p> <p>Phone number:</p> <p>Customer address:</p> <p>Customer notes:</p> <p>Price not set:</p>	<p><i>Patient First Name + Patient Last Name + MRN</i></p> <p><i>Patient Email Address</i></p> <div style="background-color: #cccccc; height: 100px; width: 100%;"></div>	<p><input type="text" value="John Smith 1234567"/></p> <p><input type="text" value="john.smith@gmail.com"/></p> <p><input type="text" value="Phone number"/></p> <p><input type="text" value="Customer address"/></p> <p><input type="text" value="Customer notes"/></p> <p><input type="text" value="Price not set"/></p> <p><input type="button" value="Add"/> <input type="button" value="Discard"/></p> <p><input type="checkbox"/> Don't send customer an email confirmation.</p> <p><input type="checkbox"/> Let customer manage their appointment when it was booked by you</p> <p><input checked="" type="checkbox"/> Send a meeting invite to the customer, in addition to the confirmation email.</p>
<p>Meeting link:</p>	<p><input checked="" type="checkbox"/> Send a meeting invite to the customer, in addition to the confirmation email</p>	

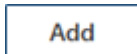
- b. Enter **Appointment Date/Time** under **Service details**:
- c. Start/End Date = Date of Appointment
- d. Adjust Appointment Duration (if required)



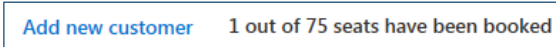
- e. Select the **Staff** under which the appointment should appear in Outlook. This can include any combination of the following:
- f. Single Practitioner (e.g., *Dr. Mary Beth Carpenter*)
- g. Multiple Practitioners (e.g., *Dr. Mary Beth Carpenter & Nura Farah*)
- h. Virtual Group/Generic Calendar (e.g., *Virtual Group*)



i. Click **Add**



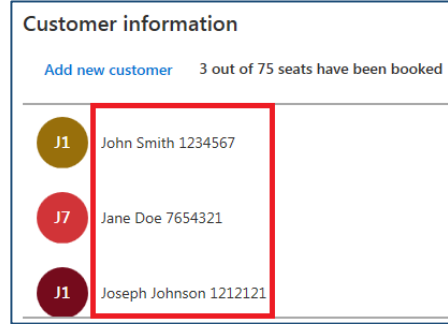
j. Click **Add new customer**



- k. Enter patient details for the **Next Patient** in the Virtual Group appointment (repeat Step 5)
- l. Repeat Steps 8, 9 & 5 for **Every Additional Patient** required in the Virtual Group appointment
- m. After **Last Patient** has been entered, click **Add**

4. Review and send

- a. A List of **All Patients** scheduled for the Virtual Group appointment will appear under **Customer information**. Confirm they are all required. Add/remove patients if required.
- b. Click **Save**

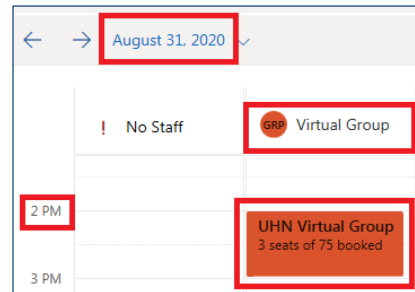


Customer information

[Add new customer](#) 3 out of 75 seats have been booked

J1	John Smith 1234567
J7	Jane Doe 7654321
J1	Joseph Johnson 1212121

- c. **Confirm** booking appears with the correct **Appointment Date/Time, Staff(s) & Total Number of Patients** (e.g., X seats of 75 booked):



← → August 31, 2020 ✓

! No Staff

GRP Virtual Group

2 PM

3 PM

UHN Virtual Group
3 seats of 75 booked

- d. **Staff / Patients** can be **Added/Removed** from existing Virtual Group appointments
 - Locate booking on MS Calendar on specified date/time & double-click on appointment
 - **Staff Changes** – Under Staff panel, select additional staff or unselect staff to remove them
 - **Patient Changes** – Cancel original booking (*see Cancelling*) & rebook with updated list of required patients; MS Bookings does not currently support “delete customer” functionality

Congratulations: the virtual visit on MS Teams is now scheduled in MS Bookings!

Having Trouble with booking on Outlook? Please contact UHN Telehealth by calling 416-340-4887 or by email at telehealth@uhn.ca

Instructions: Rescheduling in MS Bookings



Reschedule the patient appointment in PHS first to maintain link to all downstream systems (EPR, myUHN Patient Portal, etc.). See: [Initial Virtual Clinic Set Up and Patient Scheduling Process](#) (Departments>Telehealth>Resources>Virtual Care Toolkit)

1. Login to MS Bookings and select the clinic
a. See steps 1 above for detailed <i>Instructions: Scheduling in MS Bookings</i> .
2. Open the booking
a. Launch MS Bookings via Office365 b. Identify the booking you wish to change. c. Double click on the booking to open it.
3. Reschedule the booking
a. Editing Appointment Date/Time may be completed by any of the following actions: <ol style="list-style-type: none"> Double-click on booking > Update the Start/End information under Service Details <div data-bbox="980 722 1295 1077" data-label="Image"> </div> Single-click on booking > Click Edit > Update the Start/End information under Service Details <div data-bbox="305 1209 659 1566" data-label="Image"> </div> <div data-bbox="708 1304 902 1409" data-label="Image"> </div> <div data-bbox="980 1205 1295 1560" data-label="Image"> </div>
4. Review and save
a. Review and verify that all of the information has been entered correctly.
b. Click <i>Save</i> . <ul style="list-style-type: none"> An email notification for the updated appointment is sent immediately to the patient and care provider. The appointment will update in the care provider's UHN Outlook calendar.
Congratulations: the virtual visit on MS Teams is now rescheduled in MS Bookings!

Instructions: Canceling in MS Bookings



Cancel the patient appointment in PHS first to maintain link to all downstream systems (EPR, myUHN Patient Portal, etc.). See: [Initial Virtual Clinic Set Up and Patient Scheduling Process](#) (Departments>Telehealth>Resources>Virtual Care Toolkit)

1. Login to MS Bookings and select the clinic

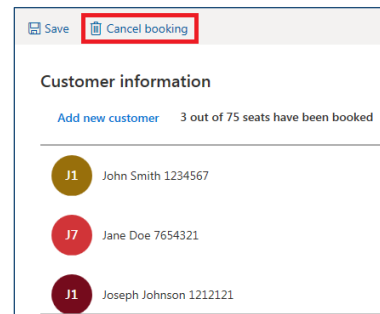
See steps 1 for detailed *Instructions: Scheduling in MS Bookings*.

2. Open the booking

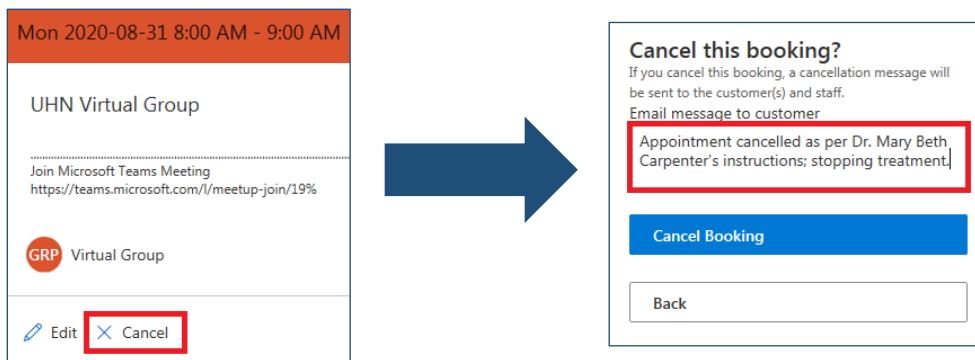
- a. Launch MS Bookings via Office365
- b. Identify the booking you wish to change.
- c. Double click on the booking to open it.

3. Cancel the booking

- a. Editing Appointment Date/Time may be completed by any of the following actions:



- b. Single-click on booking > Click Cancel > Option to add a cancellation message to Staff appears > Click Cancel Booking









- c. Click *Cancel Booking*.
 - o An email notification for the canceled appointment is sent immediately to the patient and care provider. The appointment will appear canceled in the care provider's UHN Outlook calendar.

Congratulations: the virtual visit on MS Teams is now canceled via MS Bookings!

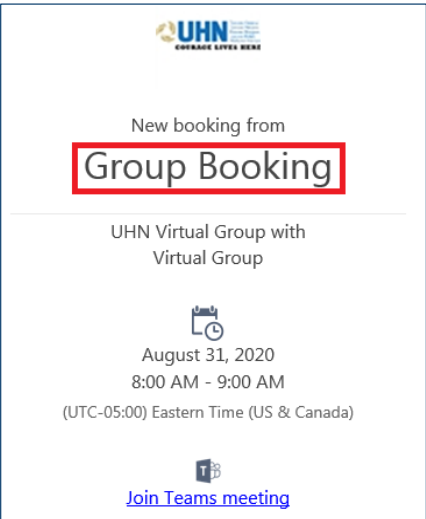
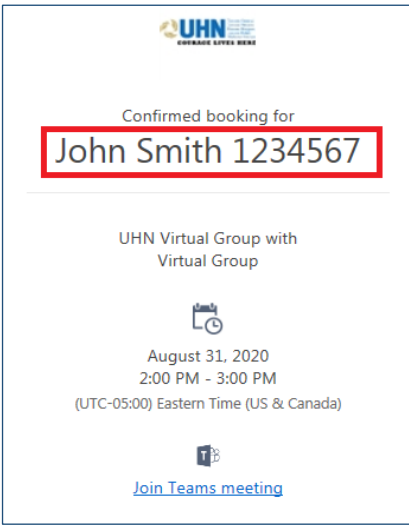
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Booking Notifications sent to Staff & Patients

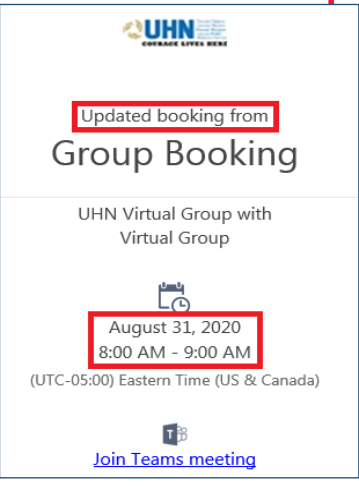
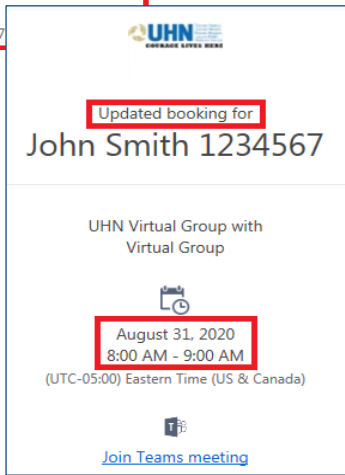
Confirmation Notification:

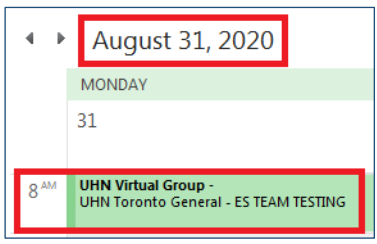
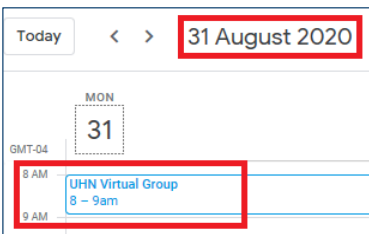
Staff	Patient
<p>Email</p> <ul style="list-style-type: none"> 1 Email notification sent with appointment details (with embedded MS Teams link) <div data-bbox="155 558 730 621" style="border: 1px solid red; padding: 2px;"> <p>UHN Toronto General - ES TEAM TESTING New booking: for UHN Virtual Group New booking from: Group Booking UHN Virtual Group with Virtual Group August 31, 2020</p> </div> <div data-bbox="263 676 690 1159" style="border: 1px solid gray; padding: 10px; text-align: center;">  <p style="border: 1px solid red; display: inline-block; padding: 2px;">New booking from</p> <h3>Group Booking</h3> <hr/> <p>UHN Virtual Group with Virtual Group</p>  <p style="border: 1px solid red; display: inline-block; padding: 2px;">August 31, 2020 2:00 PM - 3:00 PM</p> <p>(UTC-05:00) Eastern Time (US & Canada)</p>  <p>Join Teams meeting</p> </div>	<p>Email</p> <ul style="list-style-type: none"> 2 Email notifications sent with appointment details (with embedded MS Teams link) e. New booking notification f. Confirmation of booking notification <div data-bbox="914 592 1261 655" style="border: 1px solid red; padding: 2px;"> <p>UHN Toronto General - ES TEAM TESTING Confirmed: UHN Virtual Group Confirmed booking for John Smith 1234567 UHN Virtual</p> </div> <div data-bbox="914 676 1261 739" style="border: 1px solid red; padding: 2px;"> <p>UHN Toronto General - ES TEAM TESTING UHN Virtual Group Your appointment will be with Virtual Group. UHN Toron</p> </div> <div data-bbox="938 766 1349 1251" style="border: 1px solid gray; padding: 10px; text-align: center;">  <p style="border: 1px solid red; display: inline-block; padding: 2px;">Confirmed booking for</p> <h3>John Smith 1234567</h3> <hr/> <p>UHN Virtual Group with Virtual Group</p>  <p style="border: 1px solid red; display: inline-block; padding: 2px;">August 31, 2020 2:00 PM - 3:00 PM</p> <p>(UTC-05:00) Eastern Time (US & Canada)</p>  <p>Join Teams meeting</p> </div>
<p>Calendar</p> <ul style="list-style-type: none"> Appointment automatically appears in Staff's Outlook calendar (with embedded MS Teams link) <div data-bbox="274 1381 644 1612" style="border: 1px solid gray; padding: 5px;"> <p style="border: 1px solid red; display: inline-block; padding: 2px;">August 31, 2020</p> <p>MONDAY</p> <p>31</p> <div style="border: 1px solid red; padding: 2px; margin-top: 5px;"> <p>2 PM UHN Virtual Group - UHN Toronto General - ES TEAM TESTING</p> </div> </div>	<p>Calendar</p> <ul style="list-style-type: none"> Appointment automatically appears in Patient's email calendar (with embedded MS Teams link) <div data-bbox="1081 1409 1385 1642" style="border: 1px solid gray; padding: 5px;"> <p>Today < > 31 August 2020</p> <p>MON</p> <p style="border: 1px solid gray; display: inline-block; padding: 2px;">31</p> <p>GMT-04</p> <p>1 PM</p> <div style="border: 1px solid red; padding: 2px; margin-top: 5px;"> <p>2 PM UHN Virtual Group 2 - 3pm</p> </div> <p>3 PM</p> </div>

* **Patient Details** suppressed in all booking notifications; list of patients under Virtual Group appointment can only be seen in **MS Bookings**

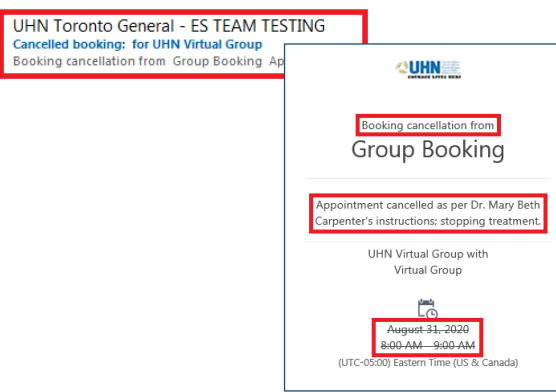
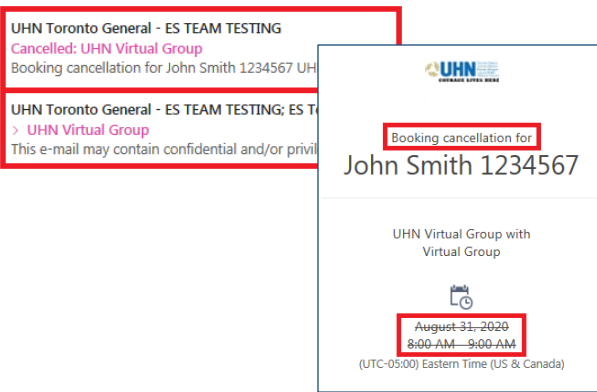
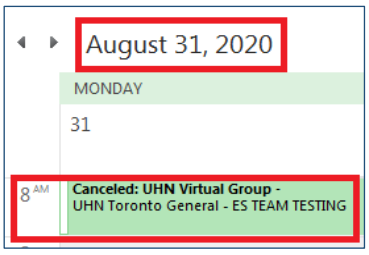
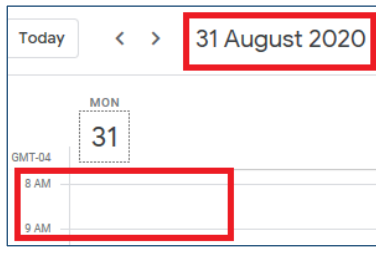
Staff	Patient
<ul style="list-style-type: none"> Practitioner’s Email/Calendar notifications have NO PATIENT DETAILS VISIBLE <p>NOTE: This is a Multi customer booking. Log into Bookings to see customer information and notes for this event.</p> <p>Booking Info ----- Service name: UHN Virtual Group</p> 	<ul style="list-style-type: none"> Patient only sees their personal information NO PATIENT DETAILS OF OTHER PATIENTS VISIBLE 

Update Notification:

Staff	Patient
<p>Email</p> <ul style="list-style-type: none"> 1 Email notification sent with “Updated Booking” details (with embedded MS Teams link) <p>UHN Toronto General - ES TEAM TESTING Updated booking: for UHN Virtual Group Updated booking from Group Booking</p> 	<p>Email</p> <ul style="list-style-type: none"> 1 Email notification sent with “Updated Booking” details (with embedded MS Teams link) <p>UHN Toronto General - ES TEAM TESTING Updated: UHN Virtual Group Updated booking for John Smith 1234567</p> 

Calendar	Calendar
<ul style="list-style-type: none"> Updated appointment automatically appears in Staff's Outlook calendar (with embedded MS Teams link) 	<ul style="list-style-type: none"> Updated appointment automatically appears in Patient's email calendar (with embedded MS Teams link) 

Cancellation:

Staff	Patient
<p>Email</p> <ul style="list-style-type: none"> 1 Email notification sent with "Cancelled Booking" details (MS Teams link removed); cancellation notes appear for Staff 	<p>Email</p> <ul style="list-style-type: none"> 2 Email notifications sent with "Cancelled Booking" details (MS Teams link removed); cancellation notes hidden from Patient 
<p>Calendar</p> <ul style="list-style-type: none"> Cancelled appointment remains in Staff's Outlook calendar; may be manually deleted 	<p>Calendar</p> <ul style="list-style-type: none"> Cancelled appointment automatically removed from Patient's email calendar 

Sample MS Teams virtual care appointment invitation text:

It is recommended that each area decide on standardized text to include in the body of a MS Teams invitation. Below are a sample for your consideration:

Hello,

You have been invited to a group session with other patients over videoconference using Microsoft Teams, a free service that is part of Microsoft Office365. Microsoft Teams uses software that is secure and confidential to connect you with your care provider over the internet.

Do not come to a UHN location for this appointment.

Session: [UHN Virtual Visit]

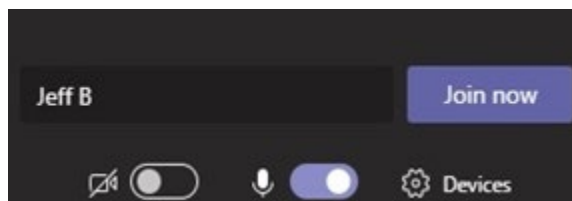
Date and Time: [Appointment Date] at [Start Time] to [End Time]

Care Provider: [Sample Care Provider]

- Do not reply to the invitation email. If you have questions about your appointment, call your clinic.
- Please review these instructions before your Microsoft Teams videoconference appointment.

The “Join Microsoft Teams Meeting” link below will take you to your group session. Please join the appointment at least 15 minutes before your scheduled appointment time.

- When signing into a group session only enter your **First Name** or **First Name and initial ONLY**. This provides privacy for your identity from other group members.



- Paste in the link as in step 3

Protecting your privacy

Your privacy is very important to us at UHN. We protect your privacy during virtual visits in the same way as we do during a clinic visit.

We suggest that you take similar steps to protect your own privacy. This means being aware of