

Scheduling a Virtual Visit in Microsoft Teams

This document was created for UHN staff and care providers in outpatient areas who will use Microsoft (MS) Teams to provide virtual visits to patients.

Please note: You can schedule virtual visits on MS Teams using either (1) **Outlook**, or (2) **Microsoft (MS) Bookings**.

MS Bookings provides the following features:

- Anonymizes contact information of care team
- Allows for clinic schedule to be created (i.e. separate from personal calendars)
- Allows for multiple people to manage the clinic schedule
- Provides automatic, standardized invitations/cancellations

To schedule MS Teams visits in your outpatient clinic you will require specific appointment types added for your PHS practitioners.

Any clinics interested in using MS Teams and/or MS Bookings for virtual care should contact the Digital Service Desk. Your request will be forwarded to the Enterprise Scheduling Team, who will enable the MS Teams and/or MS Bookings functionality in your area.

Please contact UHN Service Desk by calling 416-340-4800 ext. 4357 (H.E.L.P.), or by email at help@uhn.ca, or by placing a request through the Digital Service Portal's [Other IT Requests](#).

This document contains the following instructions:



[Scheduling in Outlook](#)
[Rescheduling in Outlook](#)
[Canceling in Outlook](#)



[Scheduling in MS Bookings](#)
[Rescheduling in MS Bookings](#)
[Canceling in MS Bookings](#)

Instructions: Scheduling in Outlook

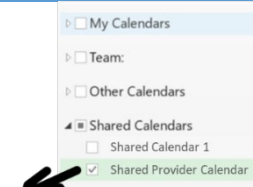
Outlook is recommended for scheduling virtual visits in MS Teams when schedulers have direct access to their providers' calendars.



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 Outlook calendar

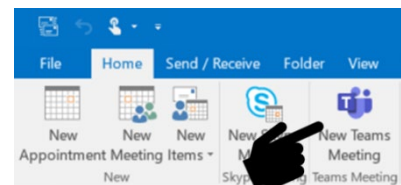
- Login to Outlook with your UHN credentials.
- Navigate to *Outlook Calendar*.
- If you are scheduling on behalf of someone, navigate to your *Shared Calendars* on the left pane and select the calendar in which you will be creating the appointment.



2. Create a new MS Teams meeting

- Click *New Teams Meeting* on the top ribbon.

Please note: Scheduling a MS Teams virtual care appointment follows the same process as scheduling a MS Teams meeting.



3. Enter the appointment details

- To* field: Enter the email addresses of the patient and required members of the care team (e.g. residents/fellows, and interpreters *if applicable*)



Note: It is important that Outlook is **not** used to schedule group appointments. Doing so may result in a privacy breach.

- Subject* field: Enter the subject for the virtual care appointment
 - Recommended subject is "UHN Virtual Visit First_Name Last_Name MRN" (e.g. UHN Virtual Visit Jane Doe 9999999)
- Location* field: Will automatically populate to "Microsoft Teams Meeting".
 - You may update or leave this field as determined by your area.
- Enter the *Start time* and *End time*.
- Enter the appointment details in the body of the meeting invitation.
 - Recommended text is [below](#).

UHN Virtual Visit - Meeting

File Meeting Insert Format Text Review Tell me what you want to do...

Attach Outlook Business Signature Table Pictures Online Shapes Screenshot Links WordArt Text Object Horizontal Line

You haven't sent this meeting invitation yet.

To: Sample.Patient@email.com

Subject: UHN Virtual Visit

Location: Microsoft Teams Meeting

Start time: Mon 2020-05-11 12:00 PM All day event

End time: Mon 2020-05-11 1:00 PM

Your care provider will see you for an appointment over videoconference using MS Teams, a free service that is part of Microsoft Office365. Microsoft Teams uses software that is secure, private and confidential to connect you with your care provider over the internet.

Do not come to a UHN location for this appointment.

Click on the "Join Microsoft Teams Meeting" link to join the appointment at least 15 minutes before your scheduled appointment time. If this is your first time joining, the link will direct you to download Microsoft Teams on your own computer, tablet, or mobile phone in the app store. Instructions for your videoconference appointment can be found here: https://www.uhn.ca/PatientsFamilies/Health_Information/Health_Topics/Documents/Virtual_Visits_Microsoft_Teams_Quick_Guide.pdf Please review the instructions before your Microsoft Teams videoconference appointment.

To change your appointment, please contact your physician's office or the clinic.

Join Microsoft Teams Meeting

Learn more about Teams | Meeting options

UHN Toronto General
Toronto Western
Princess Margaret
Toronto Rehab
Michener Institute

4. Review and send

- Review and verify that all of the information has been entered correctly.
- Click *Send*.

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

Having Trouble with Outlook? Please contact UHN Service Desk by calling 416-340-4800 ext. 4357 (H.E.L.P.) or by email at help@uhn.ca

Instructions: Rescheduling in Outlook



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. Open Outlook calendar

- Login to Outlook with your UHN credentials.
- Navigate to *Outlook Calendar*.
- If you are rescheduling on behalf of someone, navigate to your *Shared Calendars* on the left pane and select the calendar in which you will be modifying the appointment.

2. Open the appointment

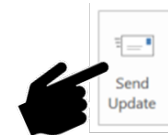
- Identify the appointment you wish to change.
- Double click on the appointment to open it.

3. Reschedule the appointment

- Revise the *Start time* and *End time*.
- Revise the appointment details in the body of the meeting invitation as determined by your area.
 - Recommended text is [below](#).

c. Review and save

- Review and verify that all of the information has been entered correctly.
- Click *Send Update*.



Congratulations: the virtual visit on MS Teams is now rescheduled in Outlook!

Instructions: Canceling in Outlook



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. Open Outlook calendar

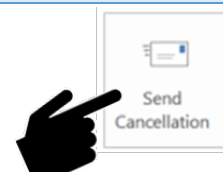
- Login to Outlook with your UHN credentials.
- Navigate to *Outlook Calendar*.
- If you are canceling on behalf of someone, navigate to your *Shared Calendars* on the left pane and select the calendar in which you will be modifying the appointment.

2. Open the appointment

- Identify the appointment you wish to change.
- Double click on the appointment to open it.

3. Cancel the booking

- Click *Cancel Booking* on the top ribbon.
- Revise the body of the meeting cancellation as determined by your area.
 - Recommended text is [below](#).
- Click *Send Cancellation*.



Congratulations: the virtual visit on Microsoft Teams is now canceled in Microsoft Outlook!

Recommended Text for MS Teams Virtual Care Appointment Invitation:

Initial Appointment

Your care provider will see you for an appointment over videoconference using MS Teams, a free service that is part of Microsoft Office365. Microsoft Teams uses software that is secure, private and confidential to connect you with your care provider over the internet.

Do not come to a UHN location for this appointment.

Click on the "Join Microsoft Teams Meeting" link to join the appointment at **least 15 minutes** before your scheduled appointment time. If this is your first time joining, the link will direct you to download Microsoft Teams on your own computer, tablet, or mobile phone in the app store. Instructions for your videoconference appointment can be found here:

https://www.uhn.ca/PatientsFamilies/Health_Information/Health_Topics/Documents/Virtual_Visits_Microsoft_Teams_Quick_Guide.pdf

Please review the instructions before your Microsoft Teams videoconference appointment.

To change your appointment, please contact your physician's office or the clinic.

Rescheduled Appointment

Your virtual visit has been **rescheduled**, please see details below for your new appointment.

Your care provider will see you for an appointment over videoconference using MS Teams, a free service that is part of Microsoft Office365. Microsoft Teams uses software that is secure, private and confidential to connect you with your care provider over the internet.

Do not come to a UHN location for this appointment.

Click on the "Join Microsoft Teams Meeting" link to join the appointment at **least 15 minutes** before your scheduled appointment time. If this is your first time joining, the link will direct you to download Microsoft Teams on your own computer, tablet, or mobile phone in the app store. Instructions for your videoconference appointment can be found here:

https://www.uhn.ca/PatientsFamilies/Health_Information/Health_Topics/Documents/Virtual_Visits_Microsoft_Teams_Quick_Guide.pdf

Please review the instructions before your Microsoft Teams videoconference appointment.

To change your appointment, please contact your physician's office or the clinic.

Canceled Appointment

Your virtual visit has been **canceled**.

If you have any questions about your appointment, please contact your physician's office or the clinic.

Instructions: Scheduling in MS Bookings

MS Bookings is recommended for scheduling virtual visits in MS Teams when multiple schedulers manage appointments for multiple providers.



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)

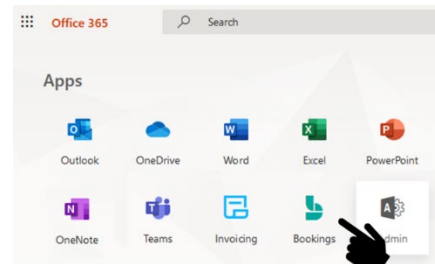
1. Login to MS Bookings

Login with your UHN credentials using either:

- Office365 web application:
<https://outlook.office.com/bookings/>

Note: use the web application if the MS Bookings app has not been installed on your computer.

- If the link does not take you directly to the *Bookings* web application, click on *Bookings* in the Apps section of the Office365 homepage.

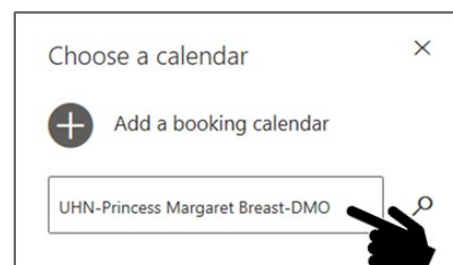
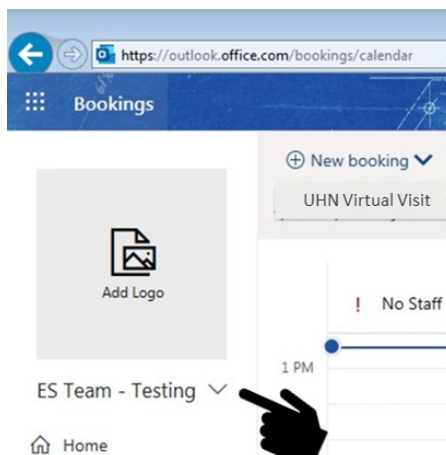


- Desktop application
Note: MS Bookings desktop application instructions and images can be found [below](#).



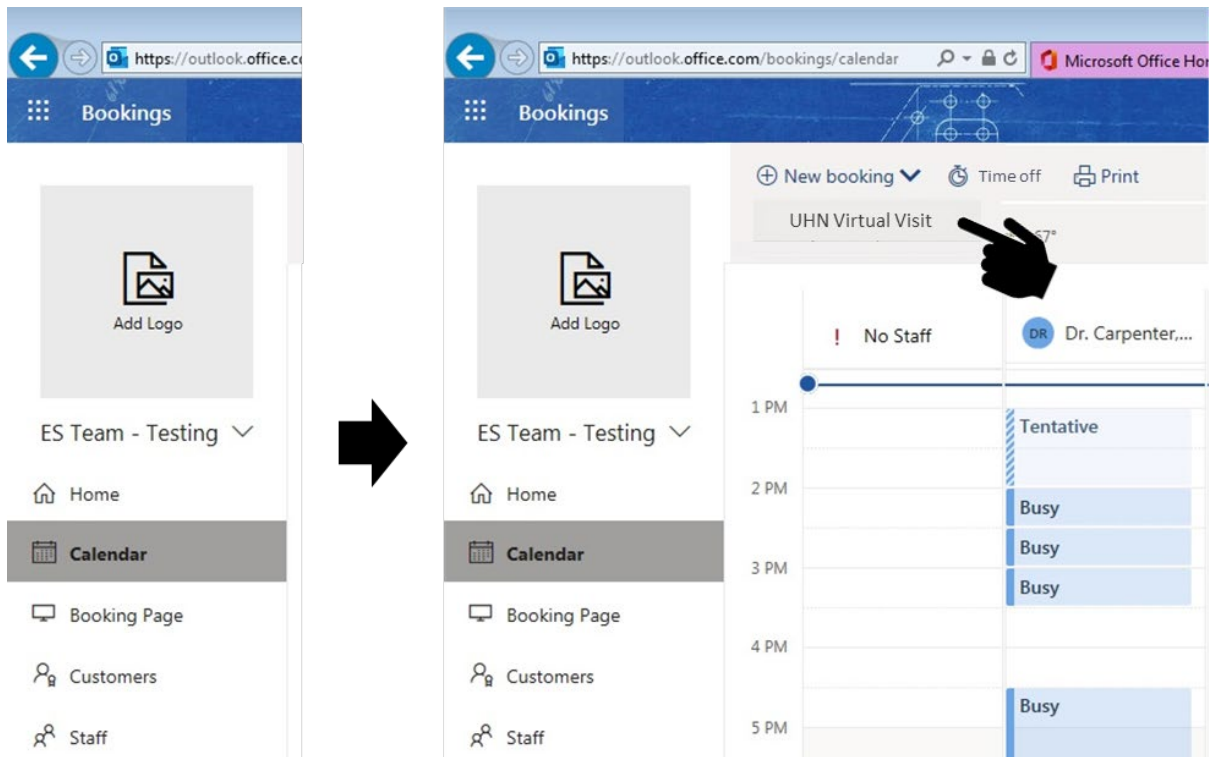
2. Select the clinic

- Click the down arrow icon from the on the left.
- Click *Open*.
- Click the clinic you wish to select.
 - Note you will only see the clinics to which you have access.
 - You may also search for a clinic by typing the clinic name into the search bar.



3. Create a new booking

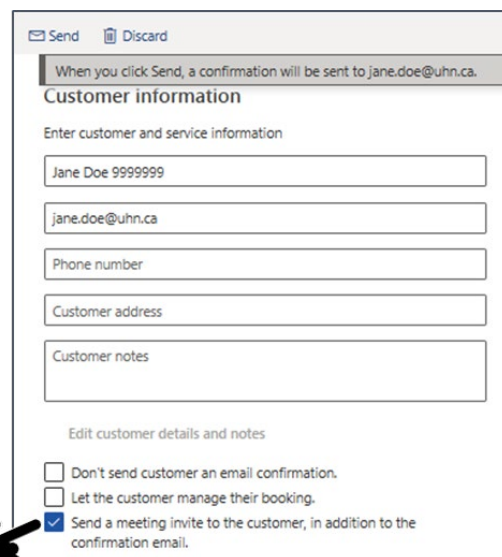
- Click *Calendar* from the left pane.
- Click *New booking* from the top left of the banner.
- Use the drop down menu to select “UHN Virtual Visit”.
 - Note that “UHN Virtual Visit” will be used for all *MS Bookings*.



4. Enter the patient

Under *Customer Information*:

- Type the patient information into the corresponding fields.
 - Name, email are mandatory fields.
 - Please enter the patient name using the format First_Name Last_Name MRN (e.g. Jane Doe 9999999)
- Check the box for “*Send a meeting invite to the customer, in addition to the confirmation email.*”



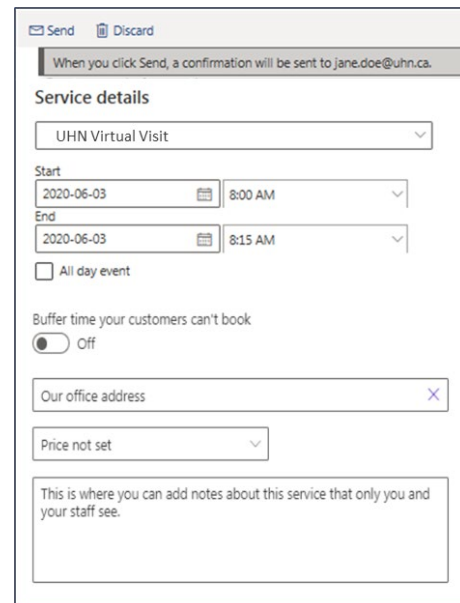

Important! Do NOT click *Send* until step 7.

When *Send* is clicked, the email invitation is sent immediately.

5. Enter the appointment details

Under *Service Details*:

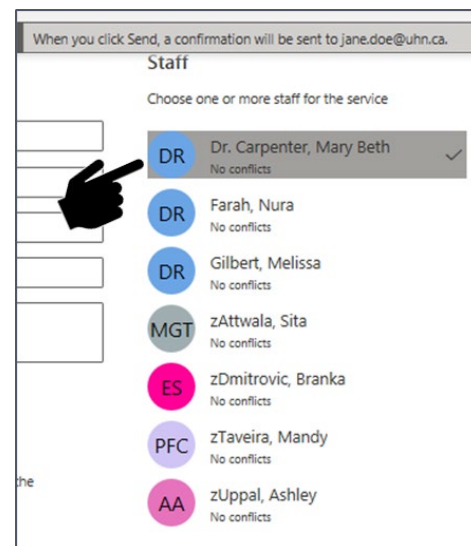
- Enter the date, start, and end time.
- Leave the *Our Office Address* field blank.
- Optional: Type in *Staff Notes*.
 - Staff notes are only visible to staff; the patient will not see what is written here.



6. Select the care provider

Under *Staff*:

- Select the care provider(s) for this appointment from the list.
 - Only care providers assigned to the selected clinic will be shown.
 - Prefixes will indicate practitioner type (e.g., DR, RN, SW).
 - Note: availability displayed in *MS Bookings* reflects *Outlook* calendar availability. Always refer to PHS for scheduling conflicts.



7. Review and send

- Review and verify that all of the information has been entered correctly.
- Click *Send*.
 - The email invitation for the appointment is sent immediately to the patient and care provider. The invitation will also appear in the care provider's UHN Outlook calendar.

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

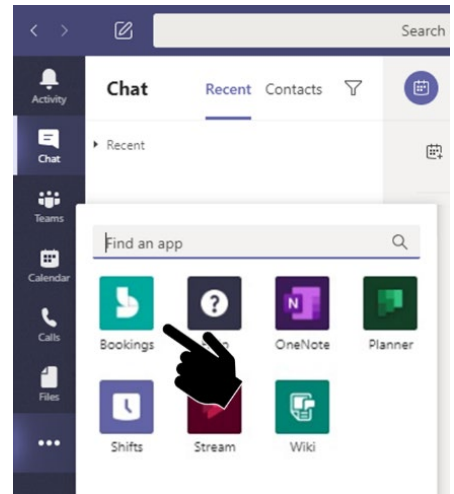
Having Trouble with MS Bookings? Contact UHN Service Desk by calling 416-340-4800 ext. 4357 (H.E.L.P.) or via email at help@uhn.ca

Scheduling in MS Bookings using the Desktop Application:

1. Login to Microsoft Bookings

Login to the Desktop application with your UHN credentials

- Open MS Teams
- Click the three dots from the left ribbon
- Click *Bookings*

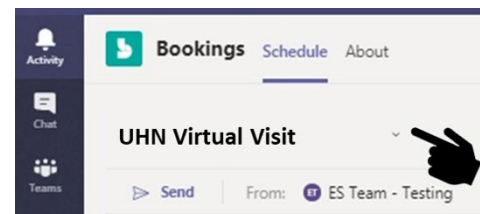


2. Select the clinic

- Click the down arrow icon next to the last opened clinic name.
- Click *Existing Booking Calendar*.
- Type the name of the clinic you wish to select, then press *Enter* on your keyboard.
- Click *Done*.

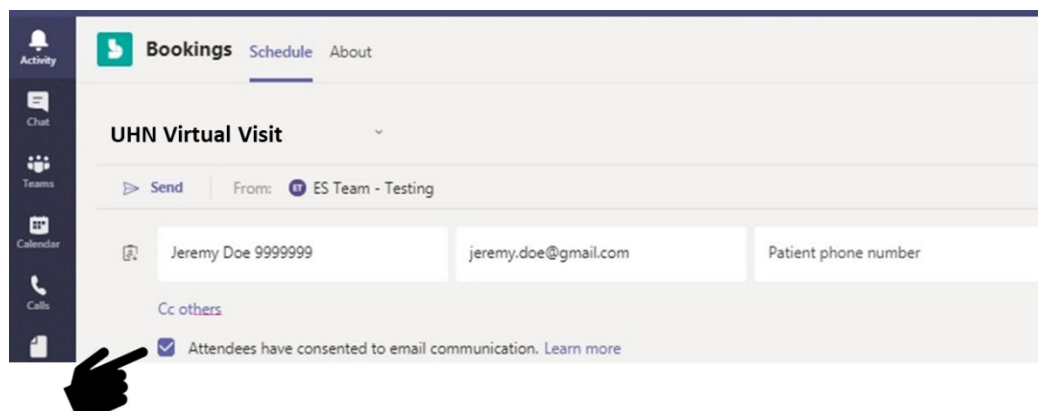
3. Create a new booking

- Click *New booking*.
- "UHN Virtual Visit" will be automatically selected.
 - Note that "UHN Virtual Visit" will be used for all *MS Bookings*.



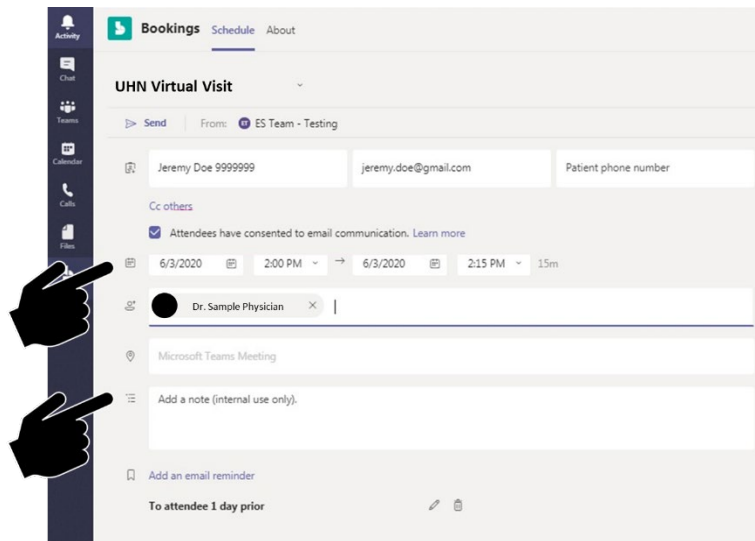
4. Enter the patient

- Type the patient information into the corresponding fields.
 - Name, email are mandatory fields.
 - Please enter the patient name using the format First_Name Last_Name MRN (e.g. Jane Doe 9999999)
- Check the box for "*Attendees have consented to email communication.*"



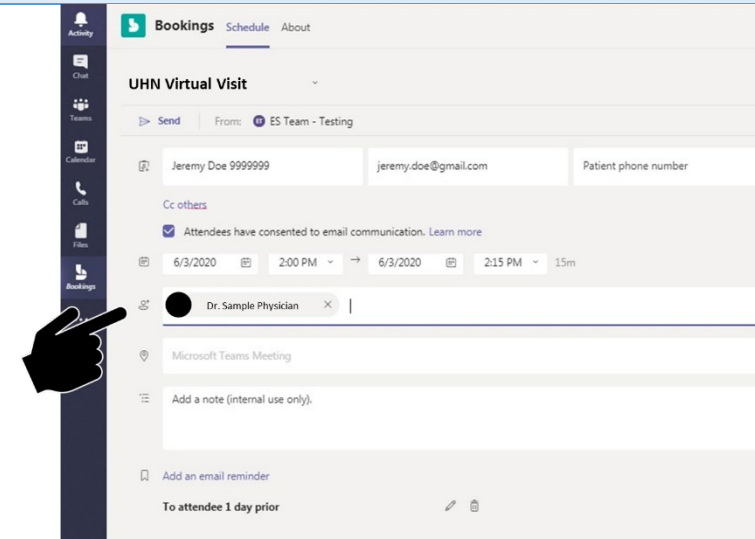
5. Enter the appointment details

- Enter the date, start, and end time.
- Optional: Type in *Staff Notes*.
 - Staff notes are only visible to staff; the patient will not see what is written here.



6. Select the care provider

- Click the *Add Staff* field.
- Select the care provider(s) for this appointment from the list.
 - Only care providers assigned to the selected clinic will be shown.
 - Prefixes will indicate practitioner type (e.g., DR, RN, SW).
 - Note: availability displayed in *MS Bookings* reflects *Outlook* calendar availability. Always refer to PHS for scheduling conflicts.



7. Review and send

- Review and verify that all of the information has been entered correctly.
- Click *Send*.
 - The email invitation for the appointment is sent immediately to the patient and care provider. The invitation will also appear in the care provider's UHN Outlook calendar.

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

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

See steps 1 and 2 above for detailed *Instructions: Scheduling in MS Bookings*.

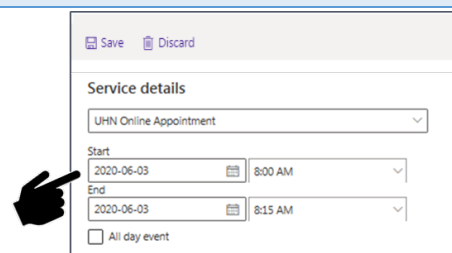
2. Open the booking

- Click *Calendar* from the left pane.
- Identify the booking you wish to change.
- Double click on the booking to open it.

3. Reschedule the booking

Under *Service Details*:

- Update the date, start, and end time.
- Leave the *Our Office Address* field blank.
- Optional: Type in *Staff Notes*.
 - Staff notes are only visible to staff; the patient will not see what is written here.



4. Review and save

- Review and verify that all of the information has been entered correctly.
- Click *Save*.
 - 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!

Rescheduling in MS Bookings using the Desktop Application:

1. Login to MS Bookings and select the clinic

See steps 1 and 2 above for detailed *Instructions: Scheduling in MS Bookings*.

2. Open the booking

- With MS Bookings opens, click the down arrow icon to select the date of the appointment to be rescheduled.
- Identify the booking you wish to change.
- Double click on the booking to open it.

3. Reschedule the booking

- Update the date, start, and end time.
- Optional: Type in *Staff Notes*.
 - Staff notes are only visible to staff; the patient will not see what is written here.

4. Review and save

- Review and verify that all of the information has been entered correctly.
- Click *Save*.
 - 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 and 2 above for detailed <i>Instructions: Scheduling in MS Bookings</i> .
2. Open the booking
<ul style="list-style-type: none"> a. Click <i>Calendar</i> from the left pane. b. Identify the booking you wish to change. c. Double click on the booking to open it.
3. Cancel the booking
<ul style="list-style-type: none"> a. Click <i>Cancel Booking</i>. <ul style="list-style-type: none"> - 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!

Canceling in MS Bookings using the Desktop Application:

1. Login to MS Bookings and select the clinic
See steps 1 and 2 above for detailed <i>Instructions: Scheduling in MS Bookings</i> .
2. Open the booking
<ul style="list-style-type: none"> a. With MS Bookings opens, click the down arrow icon to select the date of the appointment to be rescheduled. b. Identify the booking you wish to change. d. Double click on the booking to open it.
3. Cancel the booking
<ul style="list-style-type: none"> b. Click <i>Cancel Booking</i>. <ul style="list-style-type: none"> - An email notification for the canceled appointment has been 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 in MS Bookings!

Having Trouble with MS Bookings? Contact UHN Service Desk by calling 416-340-4800 ext. 4357 (H.E.L.P.) or via email at help@uhn.ca