

Tip Sheet: Day of Virtual Visit on Microsoft Teams

This tip sheet is a guide for care providers to prepare for virtual visits with their patients on MS Teams.

Connect to your Microsoft Teams Videoconferencing Appointment:

You can connect to a Microsoft (MS) Teams videoconferencing appointment using a computer, or smartphone/tablet (iOS, or Android).

1. Open your Outlook or MS Teams application

Login with your UHN credentials using either:

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



Outlook



Teams

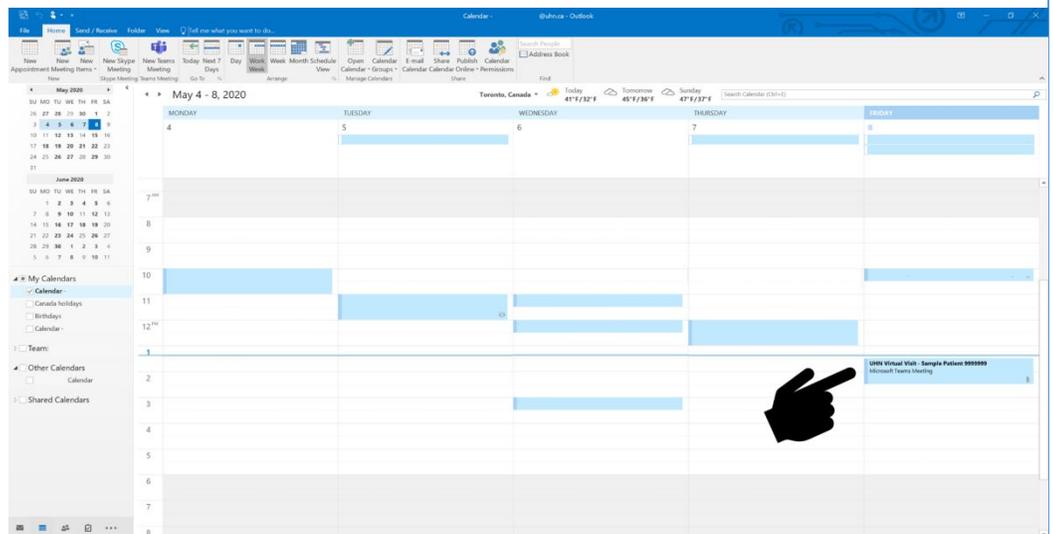
2. Identify the appointment in your Outlook or MS Teams calendar

From Outlook:

- Click the *Outlook Calendar* icon on the bottom left ribbon.



- Identify the appointment in your calendar.

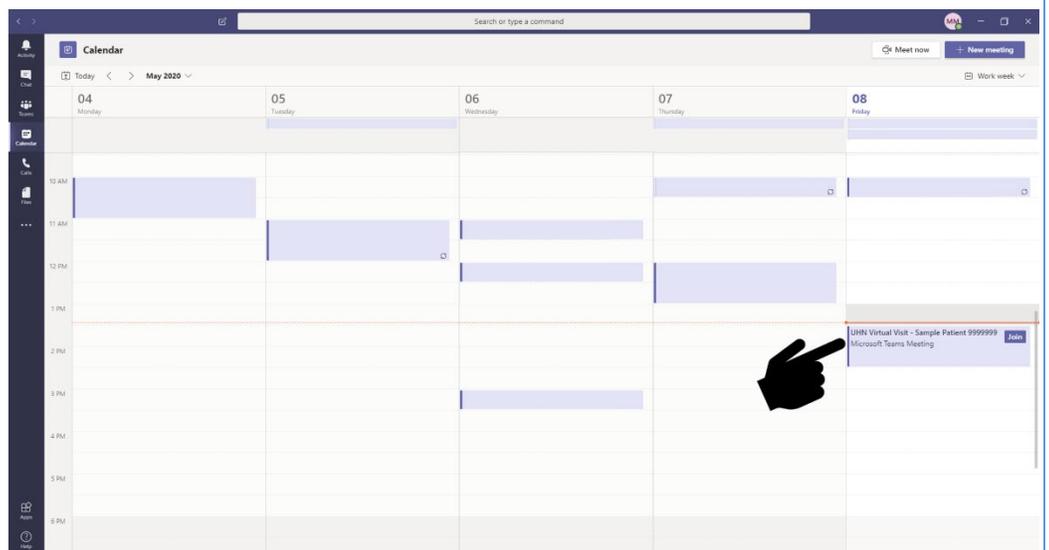


From Teams:

- Click the *Teams Calendar* icon on the ribbon on the left.



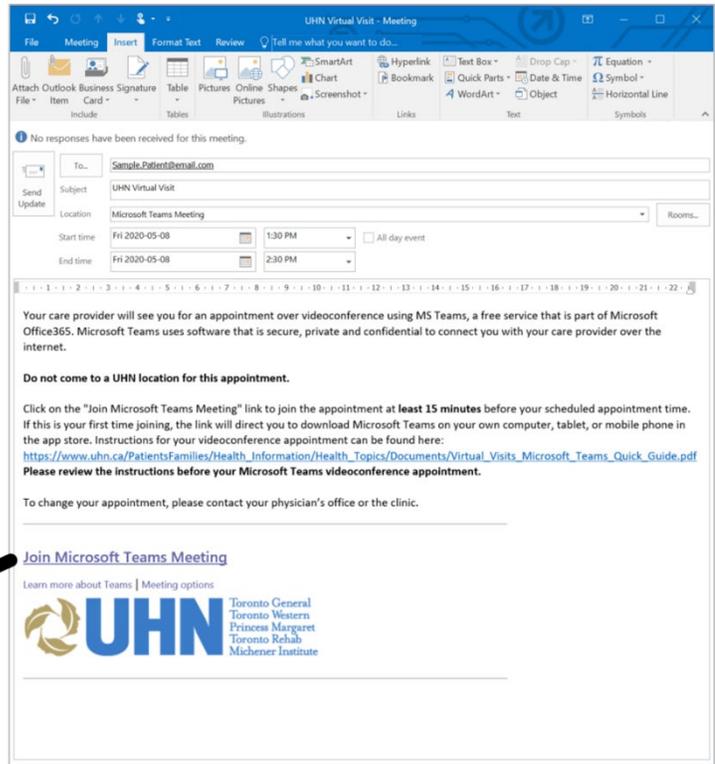
- Identify the appointment in your calendar.



3. Connect to your patient's appointment

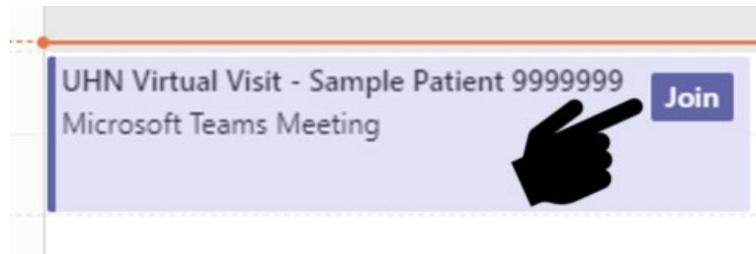
From Outlook:

- a. Double-click on the appointment in your Outlook calendar.
- b. Click *Join Microsoft Teams Meeting*.



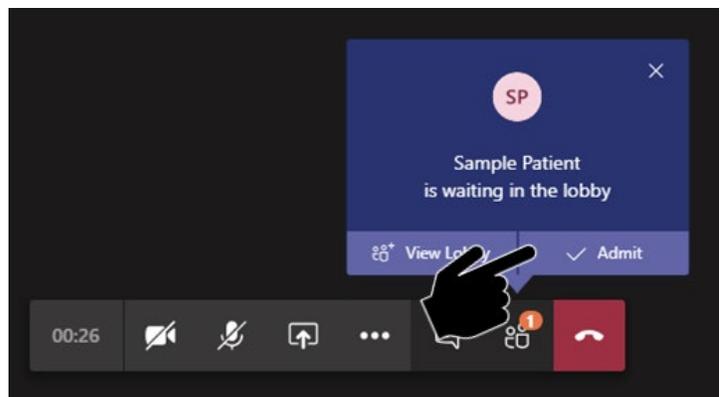
From Teams:

- a. Click *Join* button.



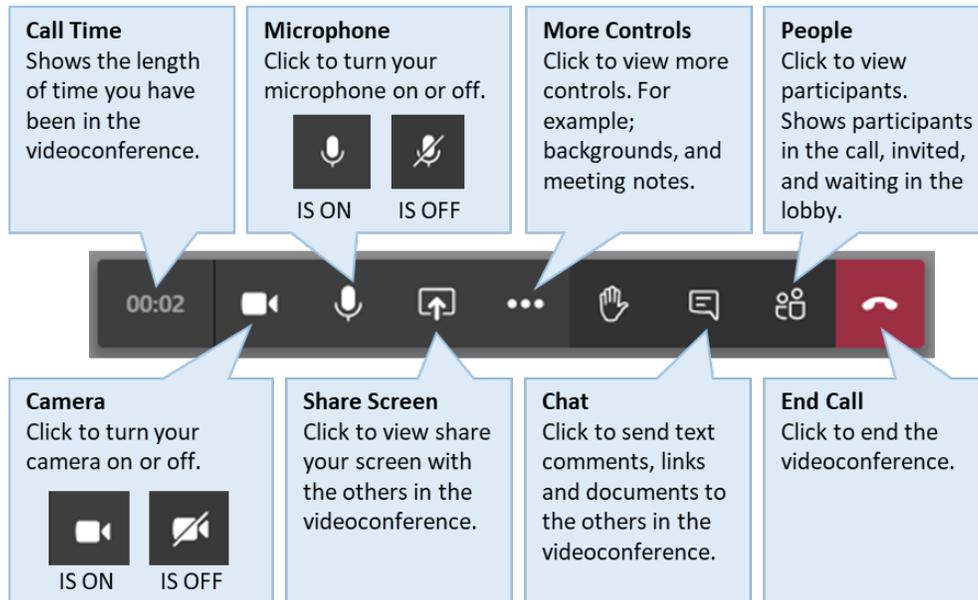
4. Admit your patient into the videoconference

- a. A pop-up will appear to notify you when your patient has joined the videoconference.
- b. Click *Admit*.



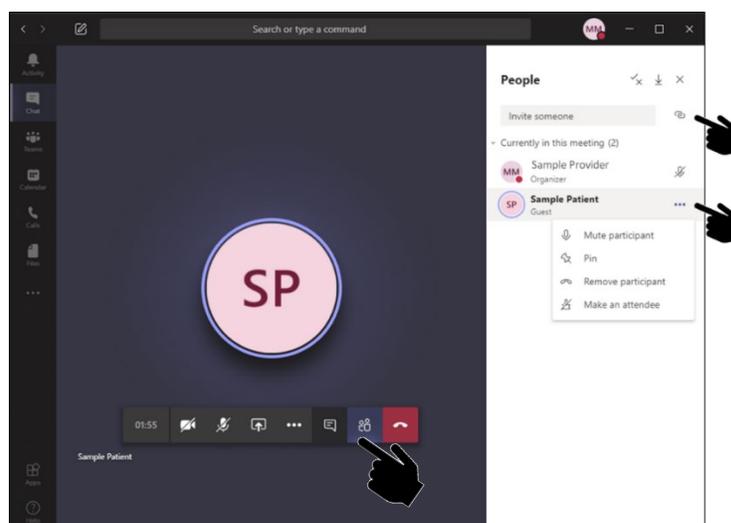
Need technical help? Please contact UHN Service Desk by calling 416-340-4800 ext. 4357 (H.E.L.P.) or via email at help@uhn.ca

MS Teams videoconference controls:



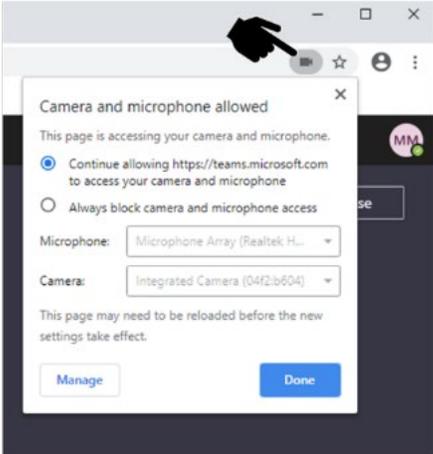
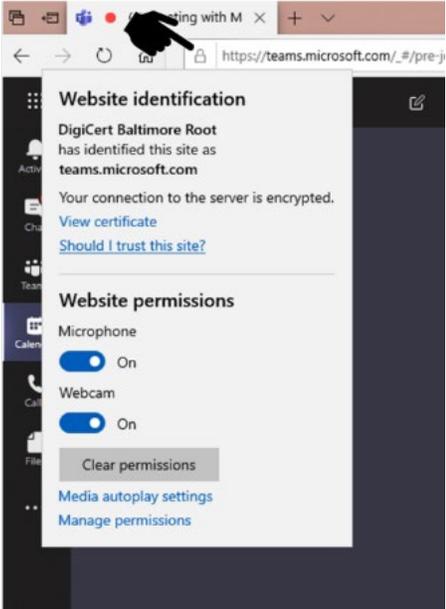
From the **People** menu, you can manage the participants in the videoconference:

- **To add a participant** to the videoconference type their name in the *Invite someone* bar.
 - Note: this function is only available for UHN participants, or guests who have previously participated in a UHN MS Teams meeting. For other guest, please send an invitation via Outlook or MS Bookings. See: [Scheduling a Virtual Visit in Microsoft Teams](#) (Departments>Telehealth>Resources>Virtual Care Toolkit)
- **To mute a participant** hover your cursor on a participant's name and the ... icon will appear. Click on the ... icon and select *Mute participant*
- **To remove a participant** hover your cursor on a participant's name and the ... icon will appear. Click on the ... icon and select *Remove participant*



Troubleshooting with your patient:

If your patient is having difficulty connecting to the appointment, you may try the following troubleshooting tips:

<p>Audiovisual Issues</p>	<p>Check audiovisual settings:</p> <ul style="list-style-type: none"> • Microphone and camera are turned on in MS Teams. • Volume on the device is turned on (not on mute) and loud enough. • If your audio visual settings are correct but not working properly, try to reconnect by leaving the meeting, closing MS Teams, and then reconnecting. <p>If using the web version of MS Teams, check that permission to use the device microphone and camera is allowed:</p> <ul style="list-style-type: none"> • Google Chrome: click the camera icon on the top right of the address bar. • Microsoft Edge: click the padlock icon on the top left of the address bar. <div style="display: flex; justify-content: space-around;"> <div data-bbox="474 720 907 1205"> <p>Google Chrome</p>  </div> <div data-bbox="940 720 1386 1360"> <p>Microsoft Edge</p>  </div> </div>
<p>Connectivity Issues</p>	<p>Ensure the best connection:</p> <ul style="list-style-type: none"> • Ask other people using the same internet network to avoid activities such as streaming videos (e.g. watching Netflix or YouTube), or playing online videogames during a virtual visit. • If you are using wireless internet (Wi-Fi), stay close to your Wi-Fi router.

Consent for Virtual Care:

When obtaining informed consent for virtual care, please consider the following elements:

- Acknowledge inherent risk of virtual care
- Recommend precautions the patient can take
- Advise where additional information can be found
- Confirm readiness for virtual care
- Obtain informed consent: “Are you OK to continue?”
- Document informed consent: a brief note that the above occurred

A sample script was provided by the Ontario Medical Association and is available below. Please feel free to adapt to your own clinical practice style.

Privacy Protection during Virtual Care:

For privacy protection during a virtual care visit, please consider the following:

- **Confirm identity.** Ask for patient’s name, date of birth and OHIP# (*Note: If OHIP number is not readily available or patient is not comfortable providing, ask the patient for the name of primary care doctor, date of last visit to the hospital or clinic*).
- **Be aware of your location and surroundings** when providing virtual care. Ensure that only staff necessary to support the call are present. Alternatively, identify anyone else who is present and explain why.
- **Advise the patient that personal health information will be discussed.** Recommend the patient be in a quiet and private place for the visit.
- **Advise the patient that the visit will not be recorded** and ask that they also not record the visit.
- Ask the patient if they are comfortable having this virtual visit.
- For further tips please see [Privacy and Working Remotely](#).

Documentation Requirements:

- **Consent** to a virtual visit must be documented in the patient chart.
- **If the patient refuses** a virtual appointment, document the refusal and as appropriate, that a telephone visit, in-person visit or delayed appointment was offered.
- **Care provided** during a virtual visit must be documented in PHS and in the patient chart.

Documenting Missed Virtual Care Appointments/No Shows:

To ensure continuity of care, please be sure to document all no shows and provide a consolidated list to the professional responsible for scheduling your clinic visits¹.

¹ UHN is investigating mechanisms to automate this process for the purpose of virtual clinics. At this time, please develop a manual process to ensure no show patients are tracked and rescheduled.
Last updated: July 22, 2020

Sample Informed Consent Script from OMA:

<p>1. Acknowledge inherent risk of virtual care.</p> <p><i>“Just like online shopping or email, Virtual Care has some inherent privacy and security risks that your health information may be intercepted or unintentionally disclosed. We want to make sure you understand this before we proceed.”</i></p>
<p>2. Recommend precautions the patient can take.</p> <p><i>“In order to improve privacy and confidentiality, you should also take steps to participate in this virtual care encounter in a private setting and should not use an employer’s or someone else’s computer/device as they may be able to access your information.”</i></p>
<p>3. Advise where additional information can be found.</p> <p><i>“If you want more information, please check [website/confirmation email/etc].”</i></p> <p>UHN provides eVisit privacy information at: https://www.uhn.ca/PatientsFamilies/Virtual_Care</p>
<p>4. Confirm readiness for virtual care.</p> <p><i>“If it is determined you require a physical exam you may still need to be assessed in person. You should also understand that virtual care is not a substitute for attending the Emergency Department if urgent care is needed.”</i></p>
<p>5. Obtain informed consent.</p> <p><i>“Are you ok to continue?”</i></p>
<p>6. Document informed consent.</p> <p><i>“Informed verbal consent was obtained from this patient to communicate and provide care using virtual and other telecommunications tools. This patient has been explained the risks related to unauthorized disclosure or interception of personal health information and steps they can take to help protect their information. We have discussed that care provided through video or audio communication cannot replace the need for physical examination or an in person visit for some disorders or urgent problems and patient understands the need to seek urgent care in an Emergency Department as necessary.”</i></p>