

## A Resource for Care Teams

### Add Participant to Video Appointments using Epic / Microsoft Teams

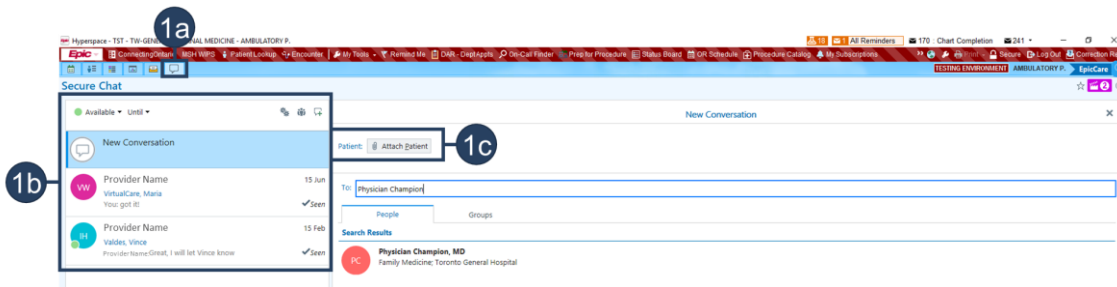
This is a resource to support care teams with adding participants (internal to UHN and external) to video appointments using Epic / Microsoft Teams.

#### 1.0 Internal Participant: Joining through Epic

You can invite an internal participant to join an Epic / Microsoft Teams video appointment through Epic using Secure Chat.

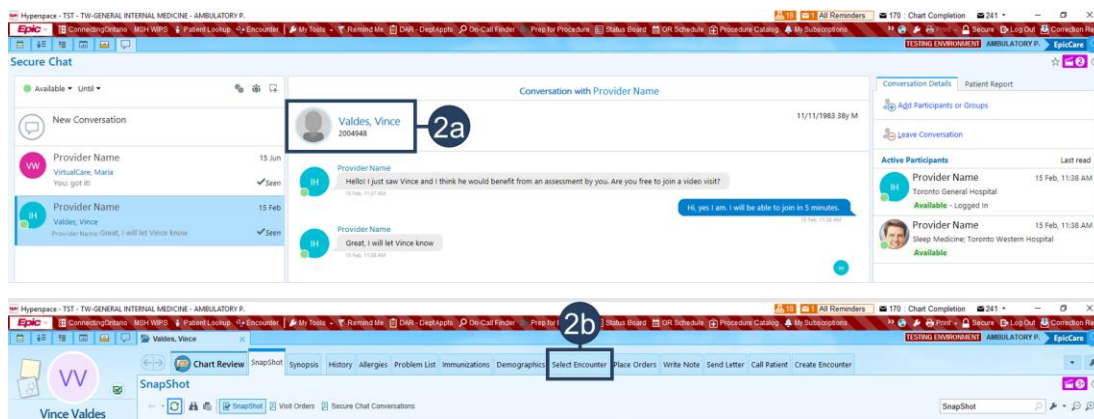
##### 1. Invite a participant via Secure Chat

- a. Select the *Secure Chat* icon from the top left ribbon
- b. Select who you would like to chat with, or create a *New Conversation*
  - *Secure Chats* can be sent to individuals or groups
  - If creating a *New Conversation*, you can search for individuals or groups from the *To* field
- c. Select *Attach Patient* to link a patient record to the *Secure Chat*
  - When a patient is attached, the *Secure Chat* becomes a part of the patient's medical record
- b. Discuss with the care team as required for care coordination
  - There is no need to share the appointment links; members of the care team will access the video appointment through the attached patient chart
  - Read receipts will indicate when the message was seen by the recipient



##### 2. Invited participant joins the video appointment via Epic

- a. From the *Secure Chat*, select the attached patient to open the patient chart
- b. From the *Select Encounter* tab, select the video appointment you want to join
  - This will launch the patient encounter for the video appointment
- c. Join video appointment from the *Connect to Video* tab of the patient encounter per usual process



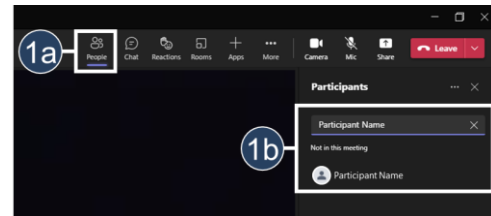
## 1.0 Internal Participant: Joining through Microsoft Teams

**During the video appointment**, you can invite an internal participant to join an Epic / Microsoft Teams video appointment through Microsoft Teams.

### 1. Invite a participant from Microsoft Teams during the video appointment

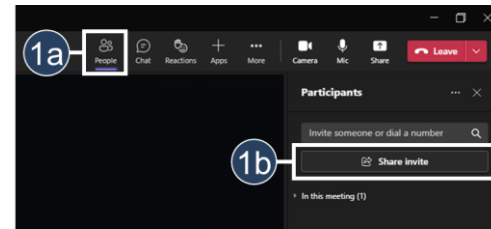
#### 1.1 Call-in Participant (Real Time)

- Select the *Participants* icon in the Microsoft Teams while the video appointment is in progress
- Use the *Invite someone or dial a number* field to search the participant by name

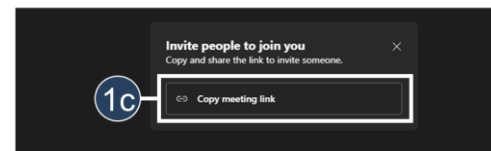


#### 1.2 Share Link with Participant

- Select the *Participants* icon in the Microsoft Teams while the video appointment is in progress
- Select *Share Invite* to copy the link to the video appointment
- Send the link via your preferred secure communication mechanism



**Note.** Document the inclusion of an additional care provider in the patient chart



### 2. Invited participant joins the video appointment via Microsoft Teams

#### 2.1 Call-in Participant (Real Time)

- Join video appointment from the Microsoft Teams call pop-up by selecting the *camera* icon

#### 2.2 Share Link with Participant

- Select the *Share invite link*
- Join video appointment from Microsoft Teams per usual process

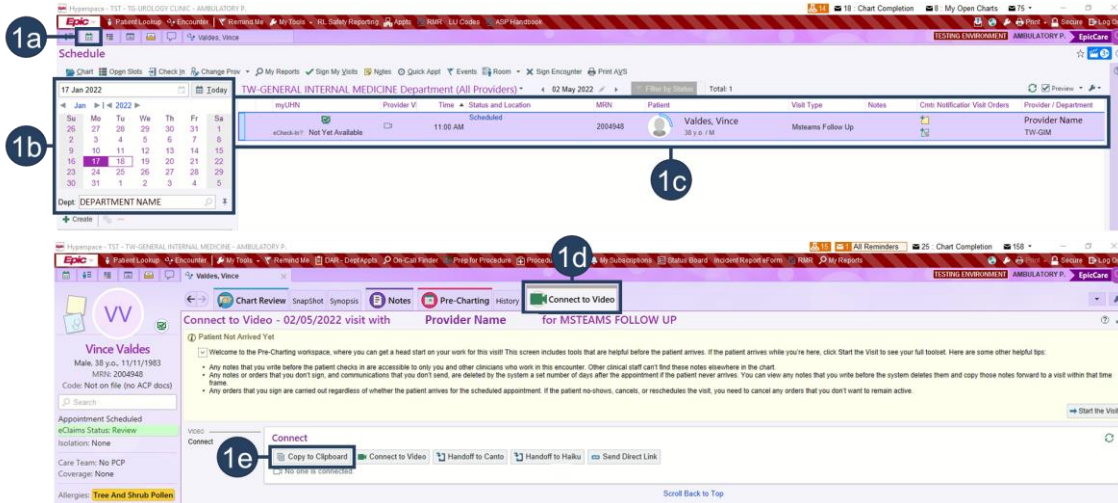
## 2.0 External Participant: Send Microsoft Teams Guest Link

You can invite an external participant to join an Epic / Microsoft Teams video appointment by sending a Microsoft Teams guest link.

### 1. Send a guest link to the video appointment

- Select the *Schedule* icon from the top left ribbon
- Select the *Date* of the appointment
- Double click the patient appointment
- Click the *Connect to Video* tab in the patient encounter
- Click the *Copy to Clipboard* button
- Send the link via your preferred secure communication mechanism

**Note.** The *Connect to Video* tab is only available 7 days in advance of the appointment



The screenshot shows the Epic EMR interface. Callout 1a points to the 'Schedule' icon in the top left ribbon. Callout 1b points to a calendar view for January 2022. Callout 1c points to a patient appointment for 'Valdes, Vince' on 02/05/2022 at 11:00 AM. Callout 1d points to the 'Connect to Video' tab in the patient encounter. Callout 1e points to the 'Copy to Clipboard' button in the 'Connect' section of the 'Connect to Video' tab.

### 2. Invited participant joins the video appointment via Microsoft Teams

- Select the *Microsoft Teams guest link*
- Join video appointment through Microsoft Teams WebRTC

**Note.** Any participants using this link will join as a guest and must be *Admitted* to the Microsoft Teams video appointment by a UHN user.