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Corporate Teams: Overview

Patient-facing meetings should only be conducted via Switchboard or Epic Video Client. The meeting workflows designed in Switchboard include settings, pre-approved by privacy and compliance, which are designed to protect patient information.

Workflows in Switchboard have the following settings:

The default settings for the Switchboard workflows **include**:

- Ability for patients to join without a Teams account**.
- Ability to screen share for patients and providers.
- Ability to mute video and microphone.
- Ability to add background blur.
- Two-way chat capabilities. Chat is disabled after a meeting ends.
- Lobby feature – guests will need to be admitted to meetings.

The default settings for the Switchboard workflows **prevent**:

- Recording (for patients and providers).
- Transcription services.
- Unauthorized users from joining meetings.

Corporate Teams accounts do not include these preset settings should only be used in pre-approved instances.

Corporate Teams should be considered if:

1. Telemedicine meetings need one or a combination of settings, not offered by Switchboard, including:
 - a. Hiding participants in meetings
 - b. Strict moderator settings
 - c. Disabling the lobby
 - d. Ability to share/designate meeting hosts
 - e. Additional recording features
2. You have a physical device (e.g. tablet) that isn't compatible with Switchboard

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Setup: Microsoft Teams Prerequisites

Hardware Requirements for PC:

Component	Requirement
Computer and processor	Minimum 1.1 GHz or faster, two core Note: For Intel processors, the maximum speed achieved using Intel Turbo Boost Technology (Max Turbo Frequency) must be considered
Memory	4.0 GB RAM
Hard disk	3.0 GB of available disk space
Display	1024 x 768 screen resolution
Graphics hardware	Windows OS: Graphics hardware acceleration requires DirectX 9 or later, with WDDM 2.0 or higher for Windows 10 (or WDDM 1.3 or higher for Windows 10 Fall Creators Update)
Operating system	Windows 11, Windows 10 (excluding Windows 10 LTSC for Teams desktop app), Windows 10 on ARM, Windows 8.1, Windows Server 2019, Windows Server 2016, Windows Server 2012 R2. Note: We recommend using the latest Windows version and security patches available.
.NET version	Requires .NET 4.5 CLR or later
Video	USB 2.0 video camera
Devices	Standard laptop camera, microphone, and speakers
Video calls and meetings	<ul style="list-style-type: none">• Requires two-core processor. For higher video/screen share resolution and frame rate, a four-core processor or better is recommended.• Background video effects require Windows 10 or a processor with AVX2 instruction set.• See Hardware decoder and encoder driver recommendations for a list of unsupported decoders and encoders.• Joining a meeting using proximity detection in Microsoft Teams Rooms requires Bluetooth LE. Bluetooth LE on Windows requires Bluetooth to be enabled on the client device and requires the 64-bit version of the Teams client. This feature is not available on 32-bit Teams clients.
Teams live events	If you are producing a Teams live event, we recommend using a computer that has a Core i5 Kaby Lake processor, 4.0-GB RAM (or higher), and hardware encoder. See Hardware decoder and encoder driver recommendations for a list of unsupported decoders and encoders.
Avatars for Teams app	For the best experiencing using the avatars for Teams app, we recommend a computer that has a four core CPU with at least 8GB of RAM.

Hardware Requirements for Mac:

Component	Requirement
Computer and processor	Intel Core Duo processor
Memory	4.0 GB RAM
Hard disk	1.5 GB of available disk space
Display	1280 x 800 or higher resolution
Operating system	One of the three most recent versions of macOS. You can find information about the latest macOS versions, and how to upgrade your version of macOS, here . For example, when a new version of macOS is released, the new version and the two immediately preceding it become the supported versions.
Video	Compatible webcam
Voice	Compatible microphone and speakers, headset with microphone, or equivalent device
Video calls and meetings	<ul style="list-style-type: none">• Requires two-core processor. For higher video/screen share resolution and frame rate, a four-core processor or better is recommended.• Joining a meeting using proximity detection in a Microsoft Teams Room requires Bluetooth LE. Bluetooth LE requires Bluetooth to be enabled on the client device.

Setup: Teams Basics (Moderator Controls)

There are three major roles in Teams meetings: **co-organizer**, **presenter**, and **attendee**.

Co-organizers and **presenters** share most organizer permissions, while attendees are more controlled.

Below are some of the capabilities assigned to each of these roles.

Capability	Organizer	Co-organizer	Presenter	Attendee
Speak and share video	✓	✓	✓	✓
Participate in meeting chat	✓	✓	✓	✓
Share content	✓	✓	✓	
Privately view a PowerPoint file shared by someone else	✓	✓	✓	✓
Take control of someone else's PowerPoint presentation	✓	✓	✓	
Mute other participants	✓	✓	✓	
Prevent attendees from unmuting themselves	✓	✓	✓	
Remove participants	✓	✓	✓	
Admit people from the lobby	✓	✓	✓*	
Change the roles of other participants	✓	✓	✓	
Start or stop recording	✓	✓	✓	
Start or stop live transcription	✓	✓	✓	
Manage breakout rooms	✓	✓		
Change meeting options	✓	✓		

Setup: Role Recommendations

Choosing Organizers and Co-Organizers:

1. If you are the **sole organizer and host of the meeting**:
 - a. There is no need to assign additional roles.
2. If you have **multiple hosts** for the meeting or the **scheduler is different from the host**:
 - a. Assign co-organizers to the meeting.
 - b. The meeting needs to be created and attendees need to be invited before co-organizers are assigned. See more below.

Notes:

- *External participants can't be made presenters or co-organizers.*
- *Co-organizers can't make changes to a meeting before it starts.*
- *The role of the meeting organizer can't be changed.*

Choosing Presenters:

Select according to the table information below:

Who can present?	What happens
Everyone	Anyone who has access to the meeting link will join the meeting as a presenter.
People in my organization	Only people in your org will be presenters. External participants will join as attendees.
Specific people	Only people you choose from the list of invitees will be presenters. Everyone else will join as attendees.
Only me	Only the organizer will be a presenter. All other participants will join as attendees.

Note:

- *You'll need to send your meeting invite directly to anyone you want to select as a presenter.*

Role and Setting Assignment: Before a Meeting

You'll need to send out the meeting invite **before you can assign roles.**

Once you've done that, go to Calendar, double-click the meeting you just created, and select **Meeting options**.

You can control the following under **Meeting Options**:

- Lobbying bypass
- Co-organizers
- Presenters
- Mic and camera capabilities
- Recording and more

Meeting options ×

Who can bypass the lobby? ⓘ

Everyone

People dialing in can bypass the lobby



Announce when people dialing in join or leave ⓘ



Choose co-organizers:

Search for participants

Who can present

Everyone

Allow mic for attendees ⓘ



Allow camera for attendees ⓘ




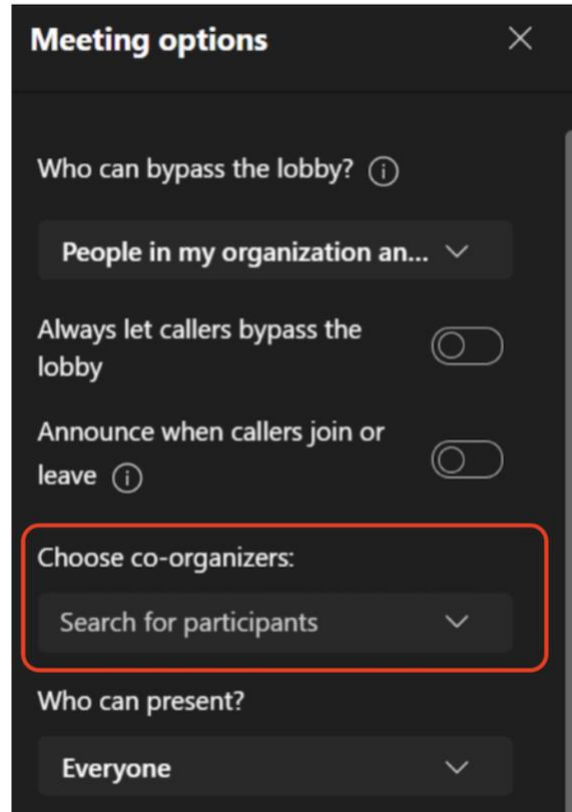
Record automatically



Role and Setting Assignment: During a Meeting

There are two ways for you or a co-organizer to change someone's role while a meeting is in progress:

1. Go to **Calendar** , **double-click the meeting**, and **select Meeting options**. Use the dropdown menu for Choose co-organizers to add a co-organizer. The co-organizer(s) you assign will then receive a notification stating they can share content and facilitate the meeting.
2. Select **Show participants** in the meeting controls to see a list of all the people in the meeting. Hover over the name of the person whose role you want to change and select **More options**. From there, select **Make a presenter** or **Make an attendee**.



Meeting Recommendations: Moderator Controls

The following recommendations are especially for larger, group meetings.

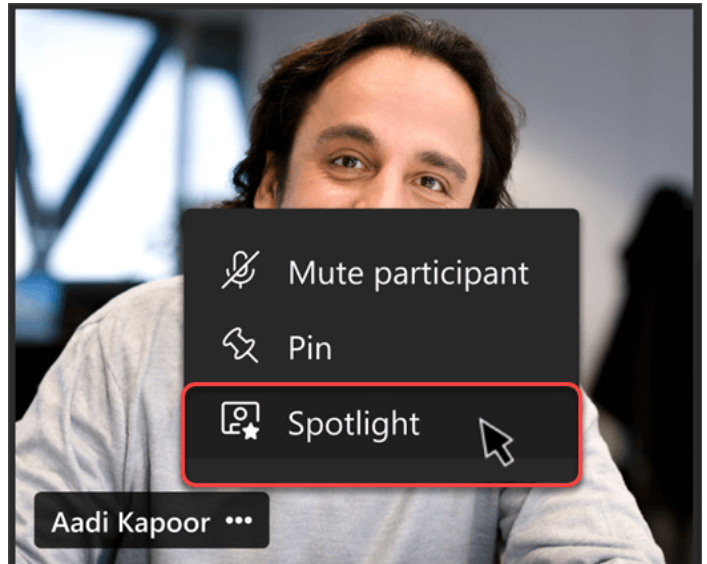
1. To the right of Who can bypass the lobby?, select a minimum of **People in my organization**.
2. To the right of Who can present?, select **Specific people**. Then, next to Choose presenters: select **Search for participants**.
 - Choose the people that you want as presenters in your meeting (from within your organization or federated organizations only).
3. To the right of Allow mic for attendees?, **switch the toggle to No**.
 - If someone needs to interact during the meeting, either allow them to unmute when they raise their hand or change their role by hovering over their name and selecting More options.
4. To the right of, Allow camera for attendees?, **switch the toggle to No**.
 - During appropriate times in the meeting, video can be permitted for an individual attendee or all attendees.
5. When you're done with these settings, select **Save**.

Meeting Recommendations: Hiding Participants

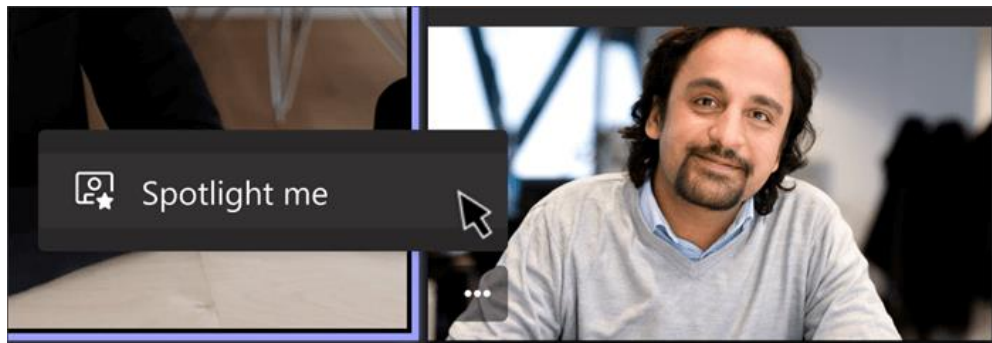
*There is no function to hide attendees in a meeting; however, you can use **Spotlight**:*

1. Use **Spotlight a video** to highlight a single presenter to make them stand out (Note that Spotlight can't be used in Large Gallery or Together Mode).

- a. Right-click on the person's video itself and **select Spotlight from the menu** (or Add spotlight, if someone else is already spotlighted).
- b. Or, select **Show participants** to see a list of everyone in the meeting. Find the name of the person in the list whose video you want to highlight, **right-click** on their name, and **select Spotlight**.



2. Use **Spotlight** on your own video:
 - a. Right-click on your video and select **Spotlight me**.
 - b. Or, select Show participants, right-click on your name, and click Spotlight me.

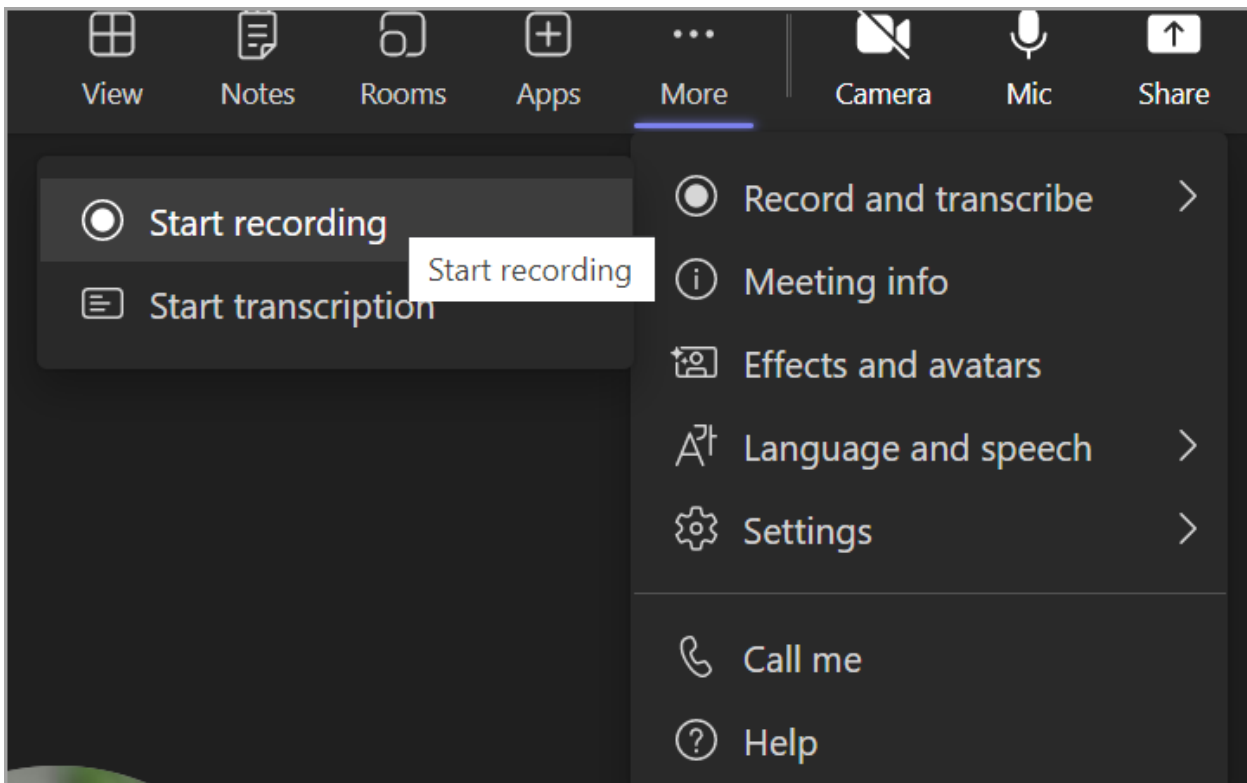


Teams Settings: Recording

Start recording

When you start recording a meeting, you also turn on live transcriptions (if your IT admin allows transcriptions).

1. Start or join the meeting.
2. Go to the meeting controls and select **More actions** > select **Record and transcribe**, then select **Start recording**.



3. Once recording has been selected, all participants will be notified that the meeting is being recorded. If anyone does not wish to be recorded, decide whether to stop recording, to cancel the meeting, or to ask them to leave the meeting if recording is important to keep in place.

Recording and transcription have started. Let everyone know they're being recorded and transcribed. [Privacy policy](#)

Stop recording

1. Go to the meeting controls and select **More actions** *** and select **Record and transcribe**.
2. Choose one of the following:
 - a. **Stop recording**: Stops the recording and live transcription.
 - b. **Stop transcription**: Stops just the live transcription. The recording continues until you select Stop recording.

Find recordings

Recordings are available in different places depending on the type of meeting.

- The recording is processed and saved to SharePoint if it was a channel meeting or OneDrive if it was any other type of meeting.
- *****The meeting recording shows up in the meeting chat or channel conversation (if you're meeting in a channel).**

If you need to hide recording for everyone in the meeting, please follow our Switchboard workflow.

Who can start or stop a recording?

Anyone who meets the following criteria can start or stop a recording, even if the meeting organizer isn't present, as long as the meeting organizer has their cloud recording policy setting turned on.

- Has one of the following licenses: Office 365 Enterprise E1, E3, E5, F3, A1, A3, A5, M365 Business, Business Premium, or Business Essentials.
- Has recording enabled by an IT admin.
- Isn't a guest or from another organization.

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Microsoft Teams for Patient Facing Meetings

Type of user	Can start recording?	Can stop recording?
Meeting organizer	Yes	Yes
Person from same org	Yes	Yes
Person from another org or company	No	No
Guest	No	No
Anonymous	No	No

Setup: Joining a Teams Meeting

1. In your email invite, select “Click here to join the meeting”.

You can also use a dial-in number and conference ID from the email to call in.

2. When joining a meeting, you have three choices:

Continue on a desktop browser: Join a Teams meeting on the web.

- **Note:** *This choice is appropriate if you do not have a Teams account.*

Download the Windows app: Download the Teams desktop app.

Download the Teams app: If you already have the Teams app, go right to your meeting.

- **Note:** *This choice is appropriate if you’re joining from a mobile device (cell phone, tablet, etc.)*

3. Type your name.

- **Note:** If you would like to remain anonymous, you can type “Guest”.

4. Select your audio and video settings.

5. Select Join now.

6. Depending on meeting settings, you'll get in right away, or go to a lobby where someone in the meeting will admit you.

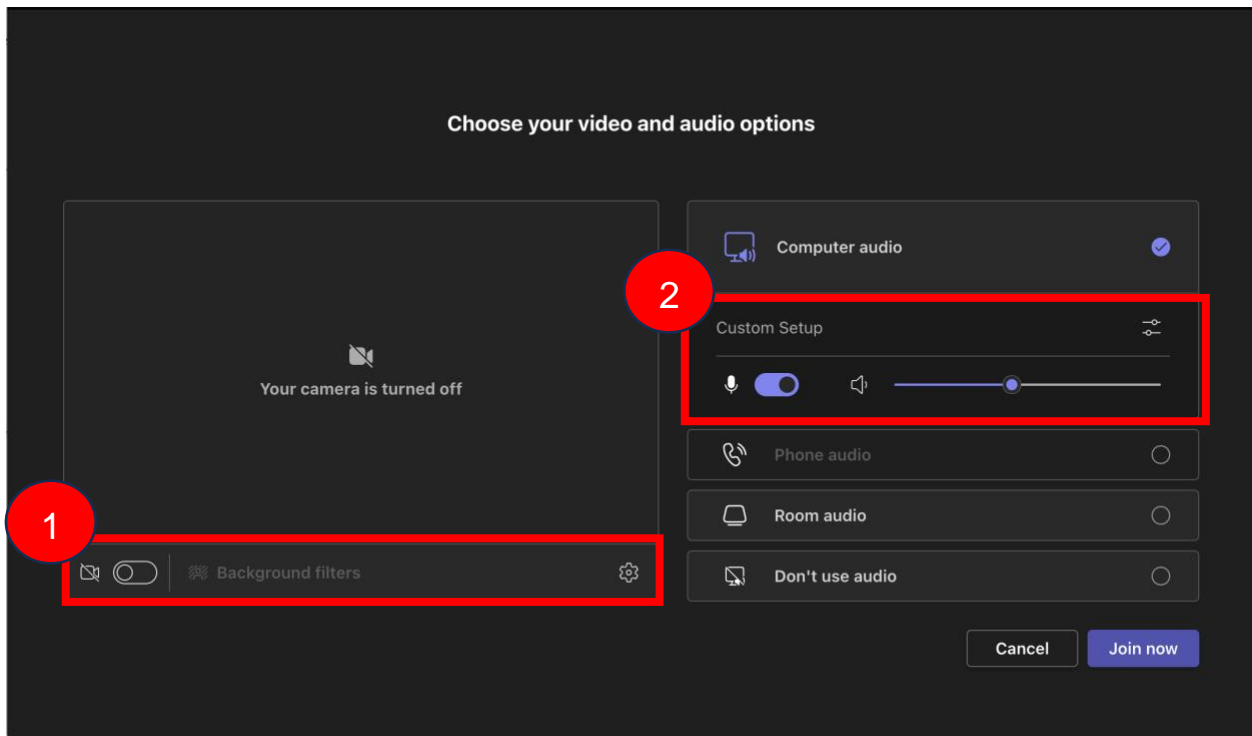
Teams Settings: Audio/Visual Settings

1. Before joining a meeting, you can adjust the following settings:

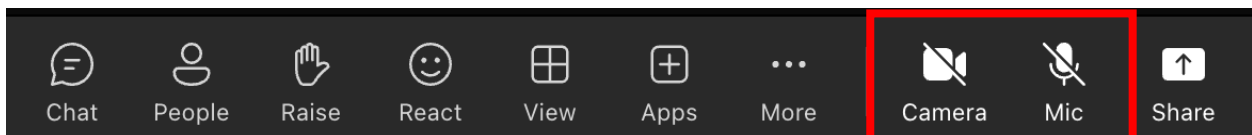
a. Video (1)

- i. Select the camera icon to preview your video.
- ii. Preview how you'd like to appear:
 1. Select "Background filters" and choose a custom background or blur.

b. Audio (2)

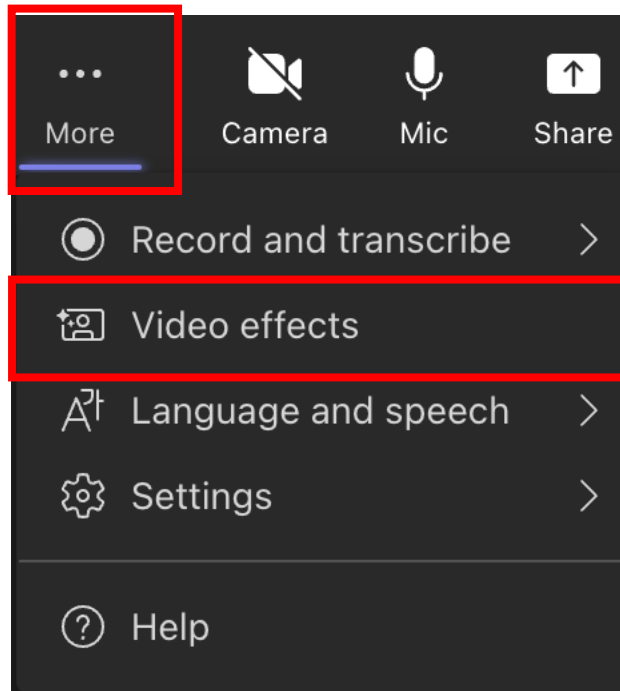


2. Once in a meeting, you can adjust the same settings via the banner at the top of your screen.

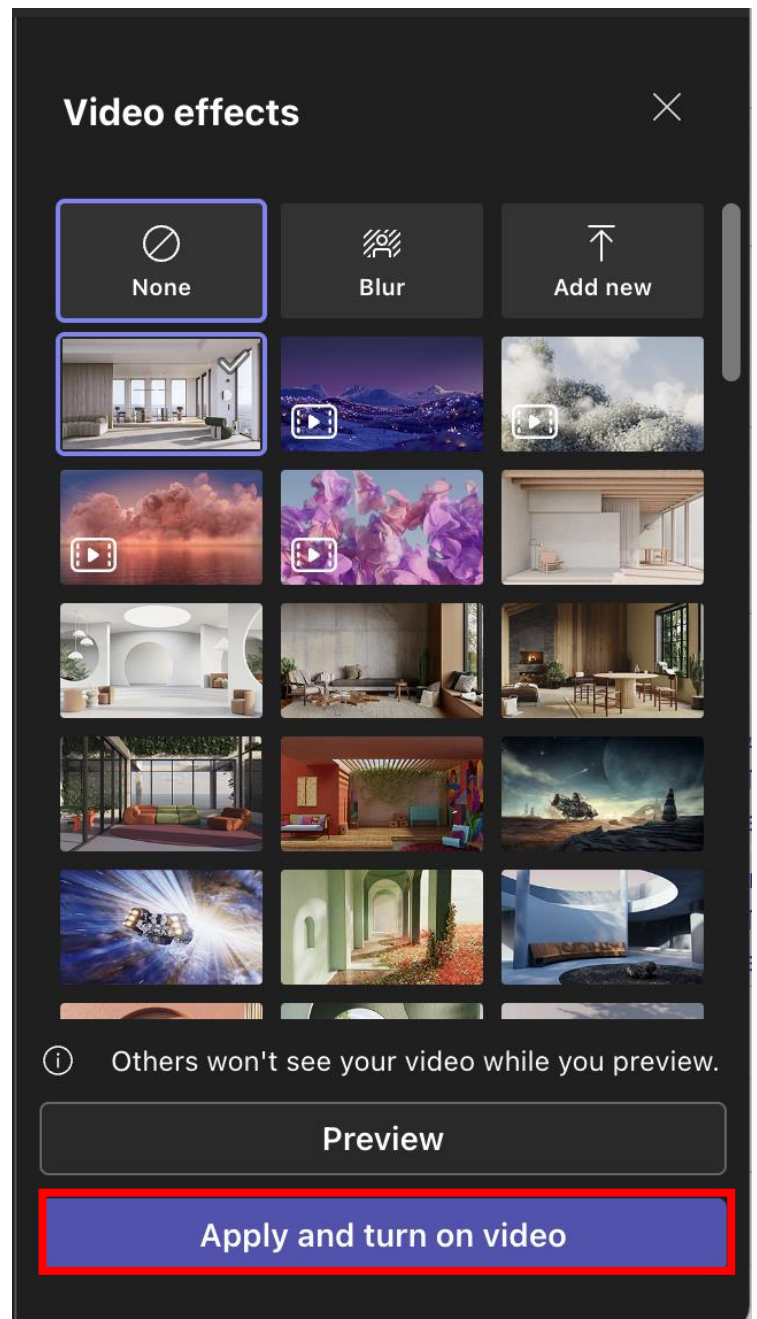


Teams Settings: Virtual Background

1. Once in a meeting, you have the option to change your virtual background.
2. You can adjust your video settings (i.e. blur) by clicking “More” and selecting “Video Effects”.

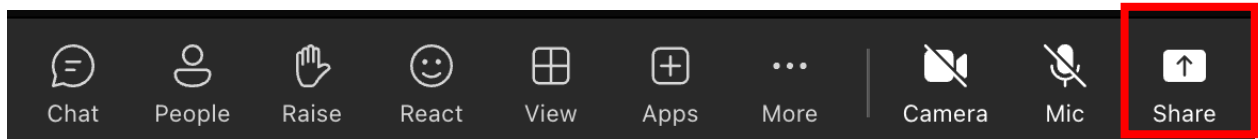


3. Select the background that you would like to use.
4. Select “Apply and turn on video”.



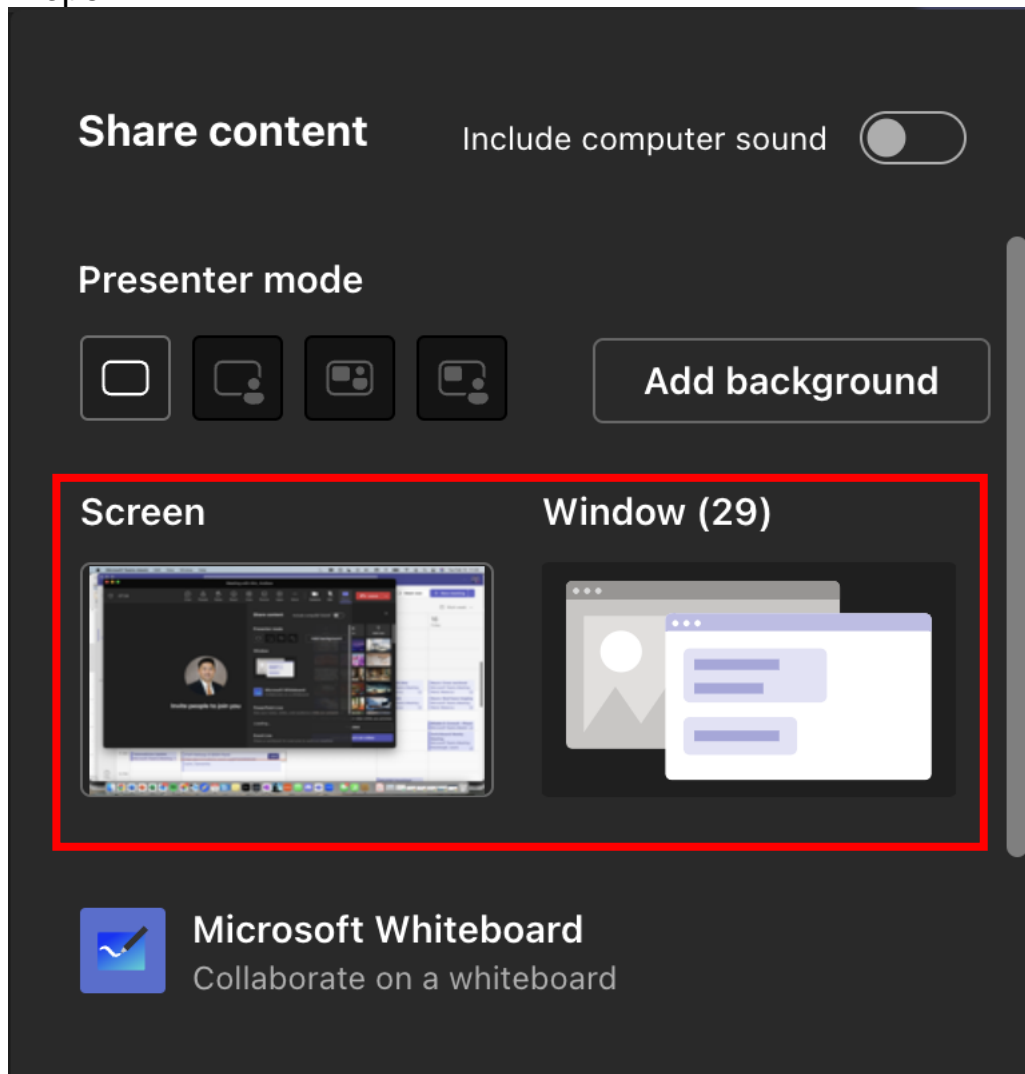
Teams Settings: Sharing Content

1. You can share content by selecting “Share”.



2. After selecting “Share”, you can select your content.

- **Screen** lets you show everything on your screen.
- **PowerPoint Live** lets you share a PowerPoint presentation.
- **Microsoft Whiteboard** and **Freehand** by Invision lets you share a whiteboard where participants can sketch together.
- **Window** lets you share an open window like a specific app you have open.

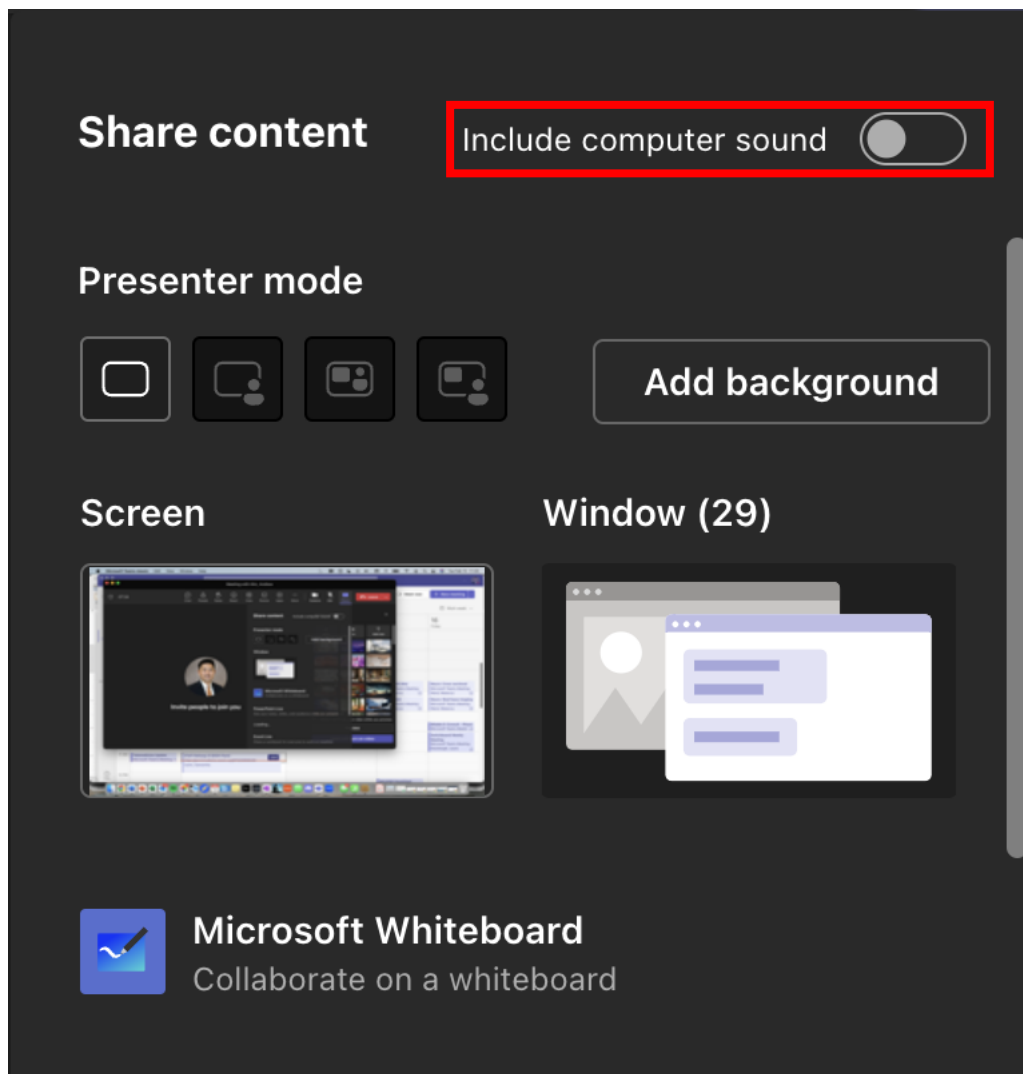


3. After you select what you want to show, a red border surrounds what you're sharing.

Meeting participants won't see any notifications that might come in.

4. Select "Stop sharing" to stop showing your screen.

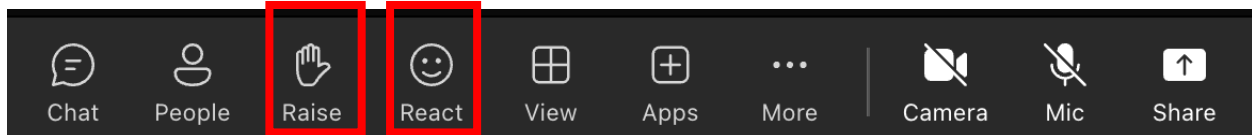
Note: You can choose to include computer sound.



Teams Settings: Raise Your Hand and Show Reactions

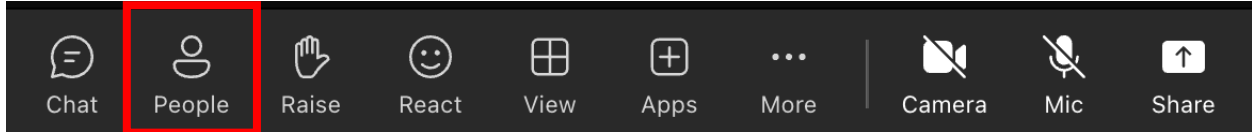
1. Under Reactions, choose how to engage in a meeting:

- a. Select Raise hand to let others know you'd like to speak up without interrupting the conversation.
- b. Choose a reaction like Applause or Heart to show how you feel.

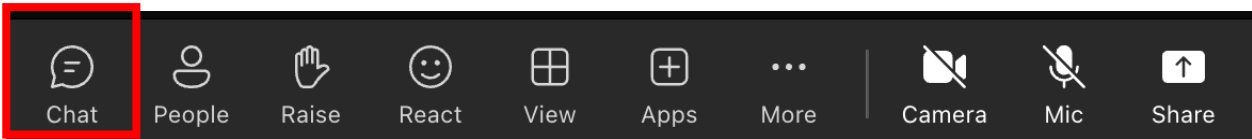


Teams Settings: Other

1. To view other people in the meeting select “People”.



2. To view the two-way chat for the meeting, select “Chat”.



Note: Your chat will be visible to all participants, unless noted otherwise. Chat will only be available during the meeting and will be locked afterwards. As a participant, you must preserve the privacy of other patients in group settings. Chat transcripts and any other information about patients cannot be copied or used beyond the purpose of the meeting.