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## Switchboard: 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 settings which are listed below.

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. Recording
2. You have a physical device (e.g. tablet) that isn't compatible with Switchboard

## On-Demand: Overview

Switchboard's On Demand feature allows for the creation and distribution of unique Microsoft Teams meeting links to one or more recipients via email and/or text.

### **Meetings will expire after 3 months.**

On Demand meetings are not technically associated with any specific patient or encounter (billable/scheduled visit), and can be used for:

3. Individual sessions for telehealth or clinician interactions
4. Group sessions for telehealth or clinician interactions
5. Non-billable, non-scheduled group sessions with multiple patients or providers

## On-Demand: Preset Settings

The default settings for the On-Demand workflow in Switchboard **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.
- Lobby feature – guests will need to be admitted to meetings.

The default settings for the On-Demand workflow in Switchboard **prevent**:

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

*Note\*\*: Patients will need to join either from desktop or by calling in. Patients cannot join from mobile unless they have the Teams app downloaded.*

For any questions, please reach out to the Connected Health Team:

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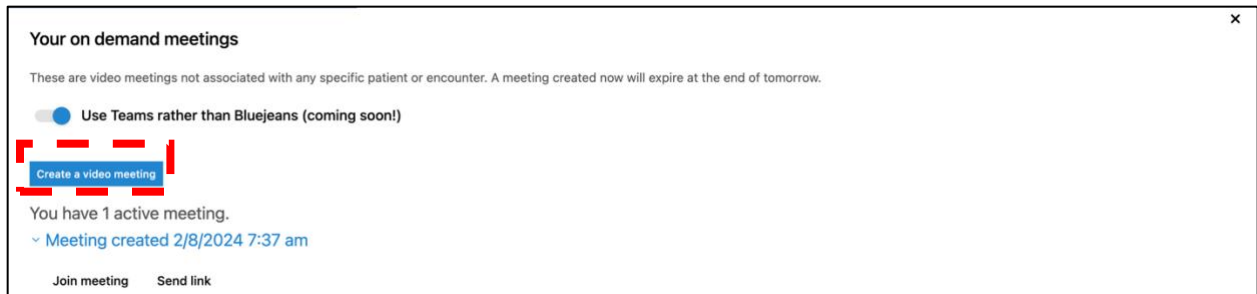
Charles Bae, MD: [Charles.bae@penmedicine.upenn.edu](mailto:Charles.bae@penmedicine.upenn.edu)

## On-Demand: Creating an On Demand Meeting

1. Select "On demand" on the upper-right corner of Switchboard.



2. Select "Create a video meeting".



## On-Demand: Managing Meetings

### 1. Select specific meeting.

Meetings you created today

Meeting - Created 3/29/2024 10:50 am · Recording enabled

Set title and organizers for this meeting Delete meeting

Join meeting **Send link**

---

Search for a patient (optional):  HUP  PPMC  PAH  CCH  PMPH  LGOED

Enter MRN

Send an email: Email (optional)

Send a text message: Phone (optional)

Please join your virtual visit here:

[https://teams.microsoft.com/join/19%3ameeting\\_MDlkZWE4YzktZDAzYy00MWU2LWI4ZTYtNWUzOTZlMmQ0N2I0%40thread.v2/0?context=%7b%22Tid%22%3a%2258e32bb7-141e-4bae-af01-f29f2a6613c2%22%2c%22Oid%22%3a%22e36a9228-5384-4404-87d5-bd745153d3d8%22%7d](https://teams.microsoft.com/join/19%3ameeting_MDlkZWE4YzktZDAzYy00MWU2LWI4ZTYtNWUzOTZlMmQ0N2I0%40thread.v2/0?context=%7b%22Tid%22%3a%2258e32bb7-141e-4bae-af01-f29f2a6613c2%22%2c%22Oid%22%3a%22e36a9228-5384-4404-87d5-bd745153d3d8%22%7d)

This visit will use Microsoft Teams. You don't need a Microsoft Teams account, but if you want to use a phone or tablet you need to install the Microsoft Teams mobile app. More information: <https://www.pennmedicine.org/telemedicine-instructions-for-patients/microsoft-teams-instructions>

Send

### 2. You can choose to add a title or co-organizer to the meeting by selecting “Set title and organizers for this meeting”.

A co-organizer can create a breakout room. That is the only additional moderator control that they have.

When adding co-organizers to a meeting, ensure that they email addresses are separated by commas, semicolons, or spaces.

You need to select “save” to ensure those settings are saved.

If you need to send co-organizers the link to the meeting, you will need to provide their email in the “Send an email” row.

### 3. You can delete meetings by selecting “Delete Meeting”.

# Penn Medicine Switchboard/Microsoft Teams On-Demand Workflow

Meetings you created today

Meeting - Created 3/29/2024 10:50 am · Recording enabled

Set title and organizers for this meeting

Delete meeting

Join meeting   Send link

Search for a patient  
(optional):

HUP  PPMC  PAH  CCH  PMPH  LGOED

Enter MRN

Send an email:

Email (optional)

Send a text message:

Phone (optional)

Please join your virtual visit here:

[https://teams.microsoft.com/j/meetup-join/19%3ameeting\\_MDlkZWE4YzktZDAzYy00MWU2LWI4ZTYtNWUzOTZIMmQ0N2I0%40thread.v2/0?context=%7b%22Tid%22%3a%2258e32bb7-141e-4bae-af01-f29f2a6613c2%22%2c%22Oid%22%3a%22e36a9228-5384-4404-87d5-bd745153d3d8%22%7d](https://teams.microsoft.com/j/meetup-join/19%3ameeting_MDlkZWE4YzktZDAzYy00MWU2LWI4ZTYtNWUzOTZIMmQ0N2I0%40thread.v2/0?context=%7b%22Tid%22%3a%2258e32bb7-141e-4bae-af01-f29f2a6613c2%22%2c%22Oid%22%3a%22e36a9228-5384-4404-87d5-bd745153d3d8%22%7d)

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Send



## On-Demand: Joining an On Demand Meeting

Select the **Join meeting** tab, then the **Join meeting** button (or use your mobile device camera and hover over the QR code).

Join meeting    Send link

---

Meeting ID 2260 8024 1213

Join meeting

Or copy the meeting link to share with others: [https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_YjZjzjMxYTUtZGIzMC00NzA5LTgwNzYtMDNiYWVhZDY1OTVj%40thread.v2](https://teams.microsoft.com/l/meetup-join/19%3ameeting_YjZjzjMxYTUtZGIzMC00NzA5LTgwNzYtMDNiYWVhZDY1OTVj%40thread.v2)



Joining the On Demand meeting you created from Switchboard will grant you moderator functions (Mute/Unmute All, Lock/Unlock room, Drop participant, etc.). Patients joining from the meeting link that was sent to their email/phone will join as participants.



## Joining Teams Meeting: As the Provider

1. Hit cancel on the open screen.
2. Select joining from either browser or joining via Teams app.

Open Microsoft Teams classic?

https://teams.microsoft.com wants to open this application.

Always allow teams.microsoft.com to open links of this type in the associated app

1 Cancel Open Microsoft Teams classic

Join your Teams meeting

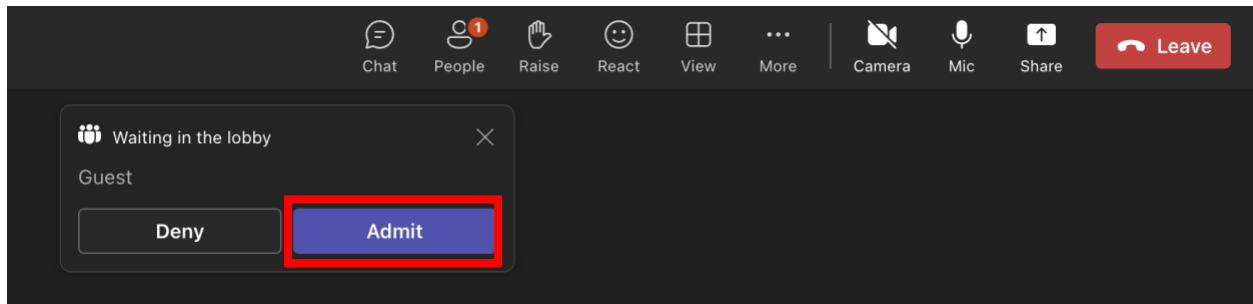
2 Continue on this browser

Join on the Teams app

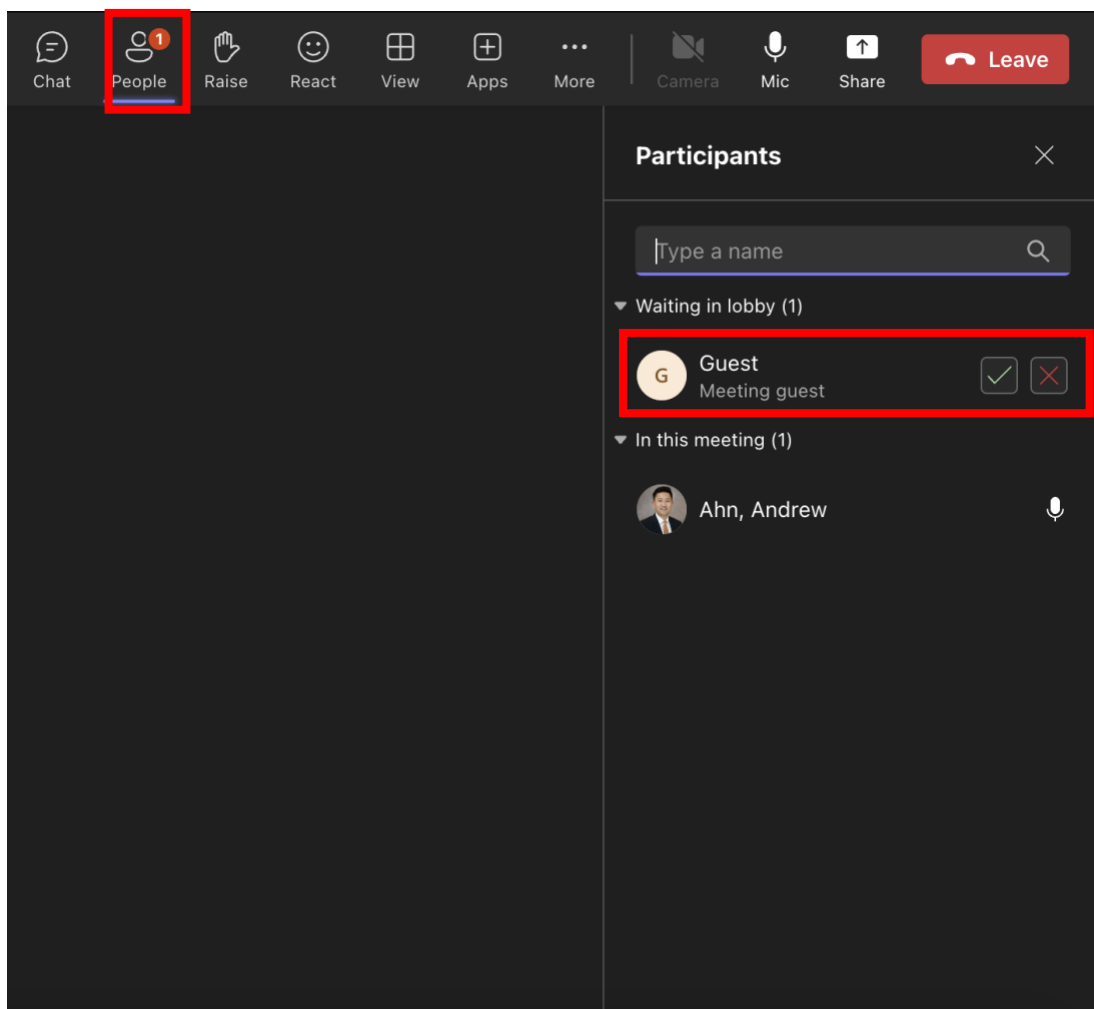
Don't have the app?  
[Download it now](#)

## Joining Teams Meeting: Lobby

1. You, the host (or co-organizer), need to join the meeting first.
2. Then, admit the guest once they are joined.

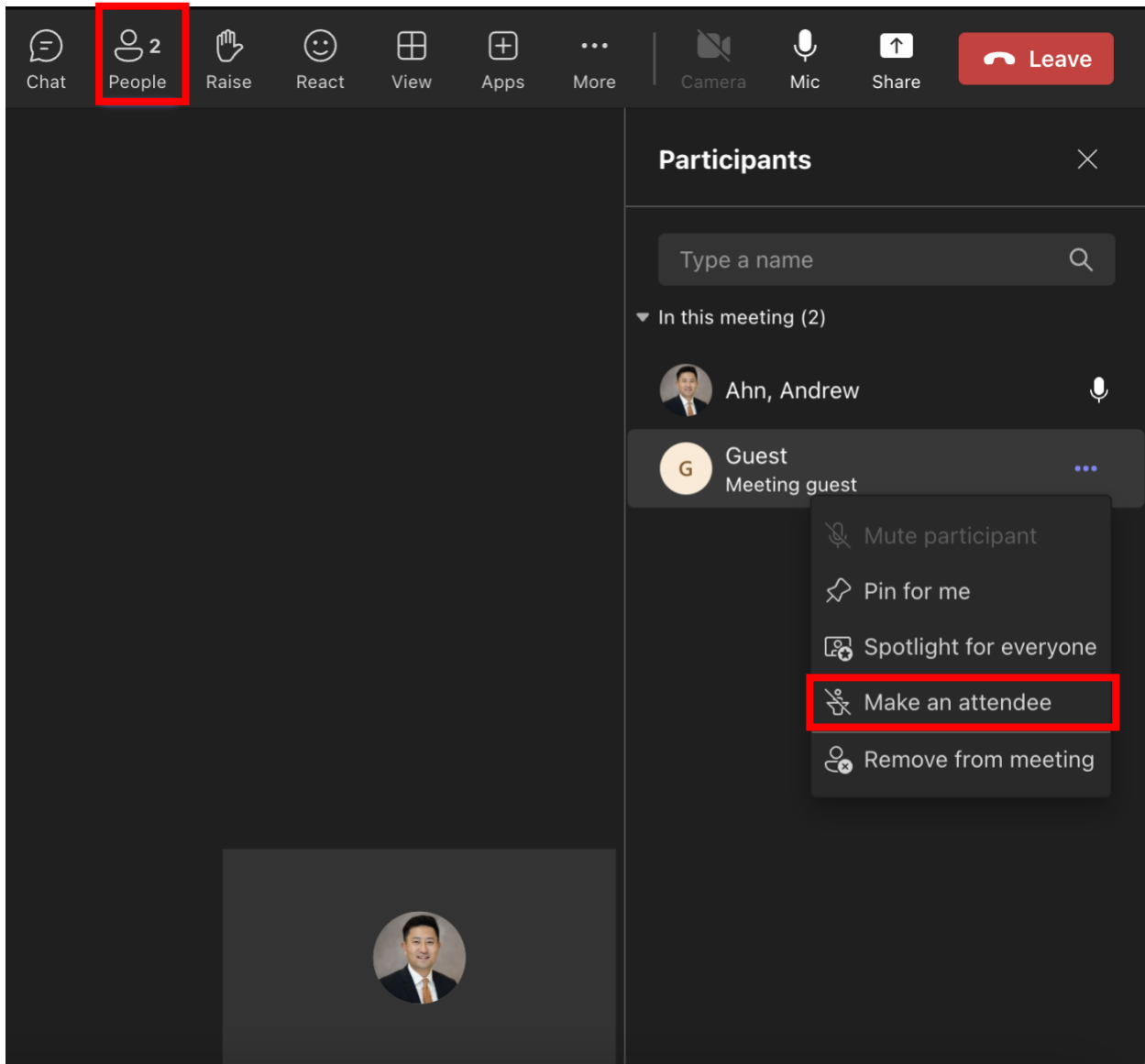


3. If the lobby function doesn't auto-populate, you can select "People" and admit from there.



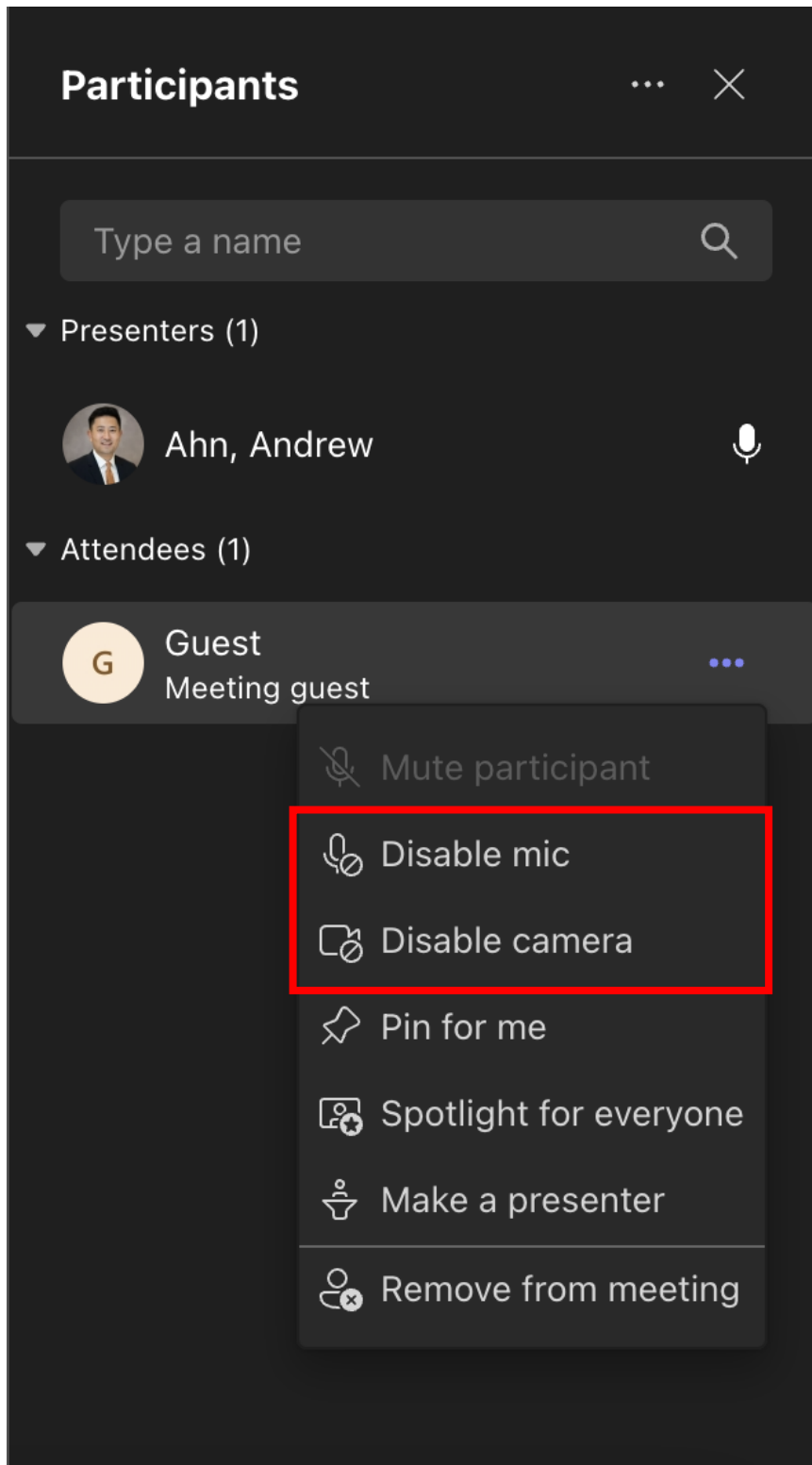
## Teams Settings: Intra Meeting Moderator Control

1. When a patient joins a meeting, they are automatically assigned as a “Presenter”. This gives them rights to share content, mute others, and more.
2. If you would like to limit such functions, select “People” and then the three ellipses next to a patient’s name. Then select “Make an attendee”.



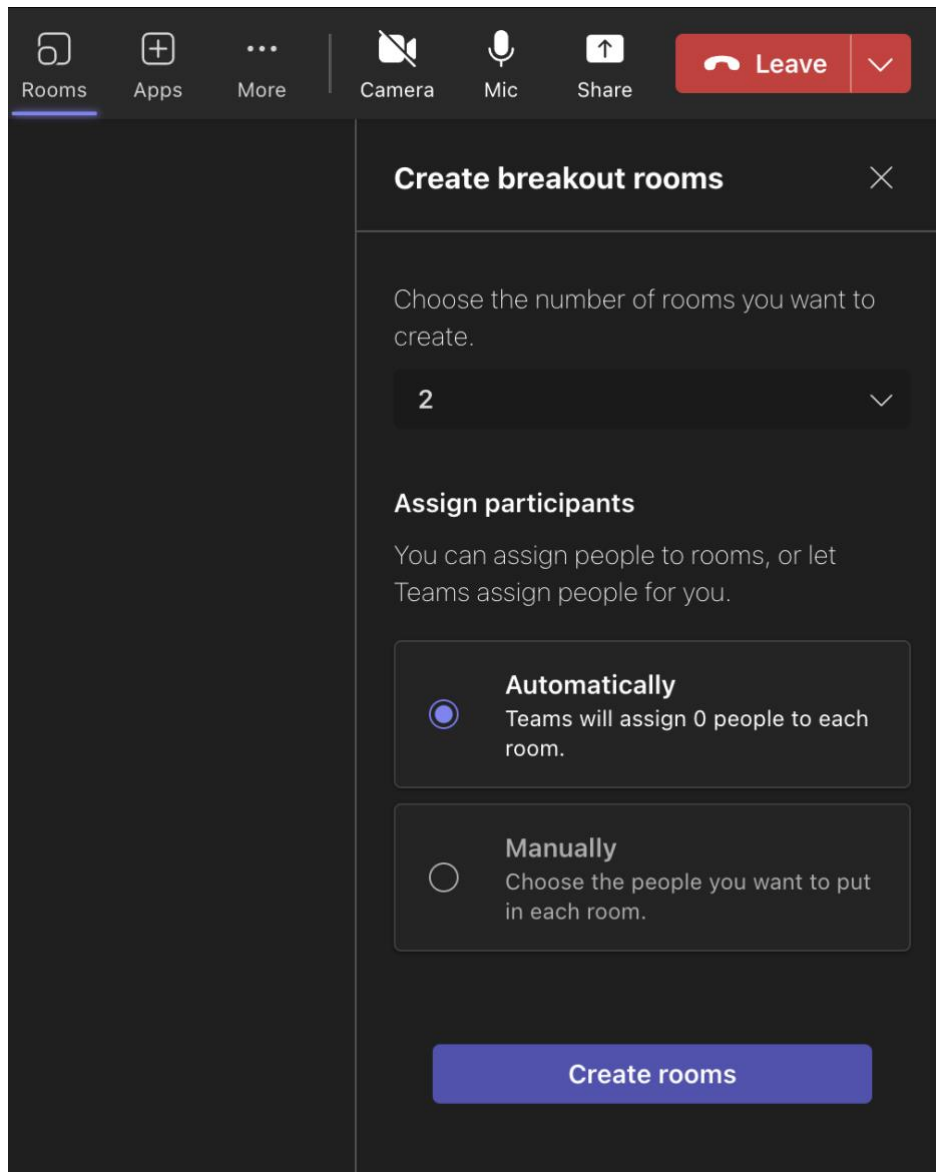
*Note: You always can remove someone from a meeting (regardless of whether they are a presenter or attendee)*

**3. You now can control their video and mic capabilities.**



## Teams Settings: Breakout Rooms

1. **Select Room**
2. **Specify the number of rooms that you want to create.**
  - a. **Automatically or manually assign people to rooms**



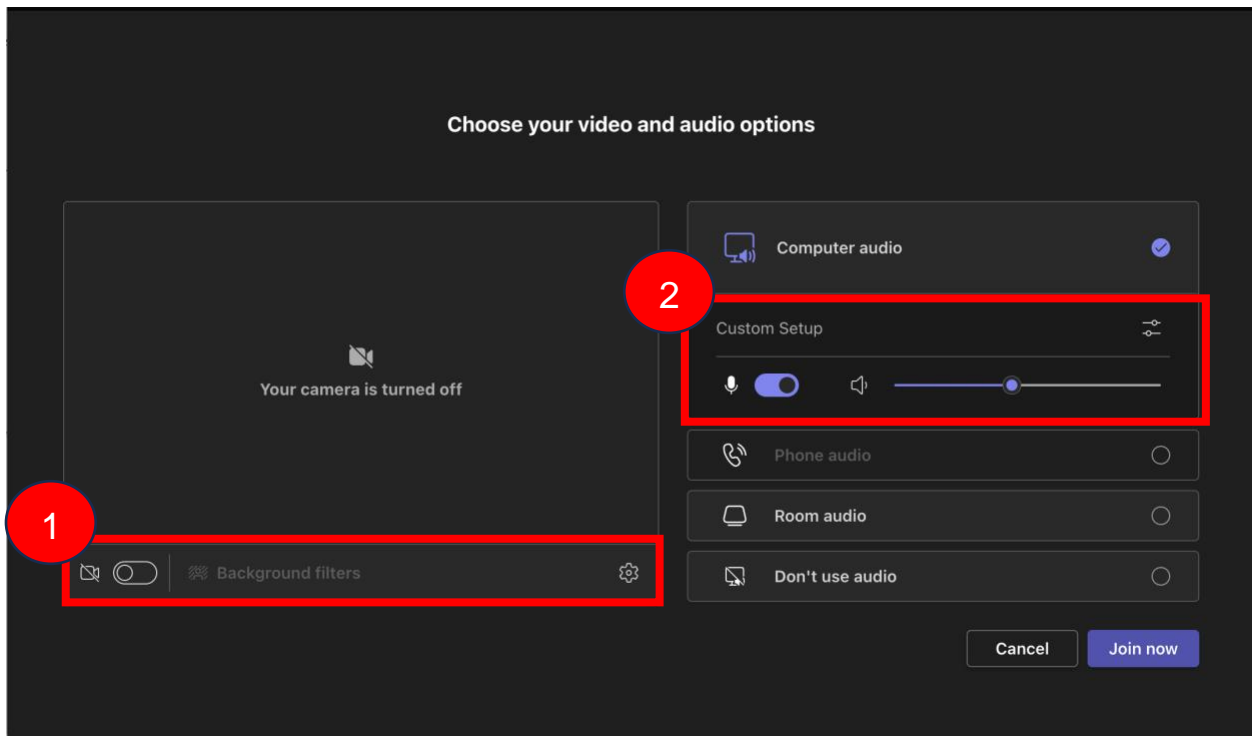
## Teams Settings: Audio/Visual Settings

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

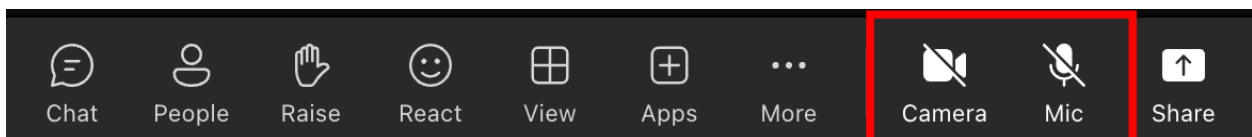
#### a. Video (1)

- 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)

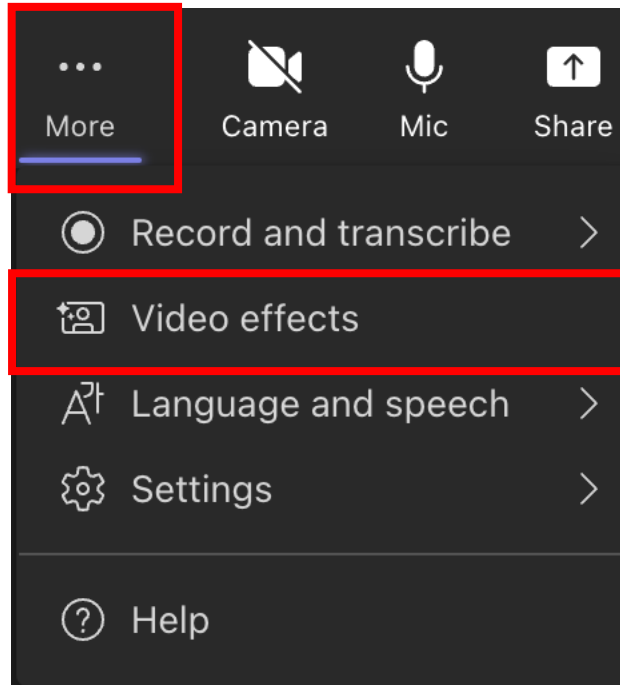


### 2. Once in a meeting, you can adjust the same settings via the banner at the top of your screen.

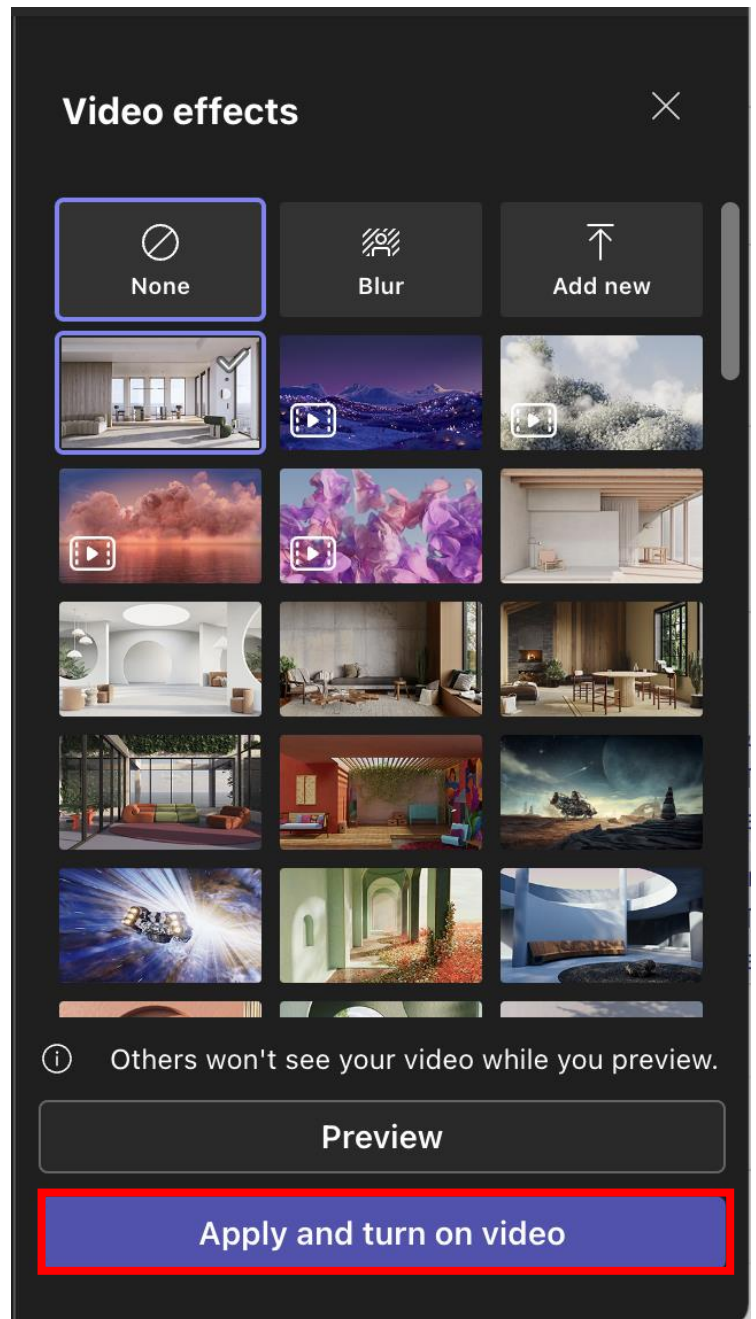


## Teams Settings: Virtual Background

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”.

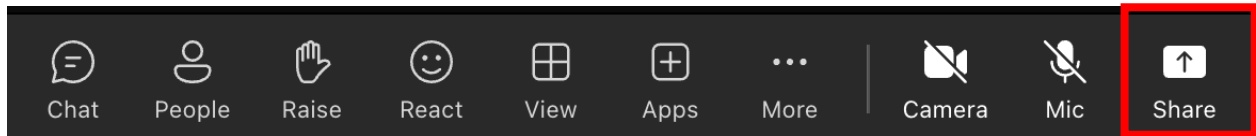


3. Select the background that you would like to use.
4. Select “Apply and turn on video”.



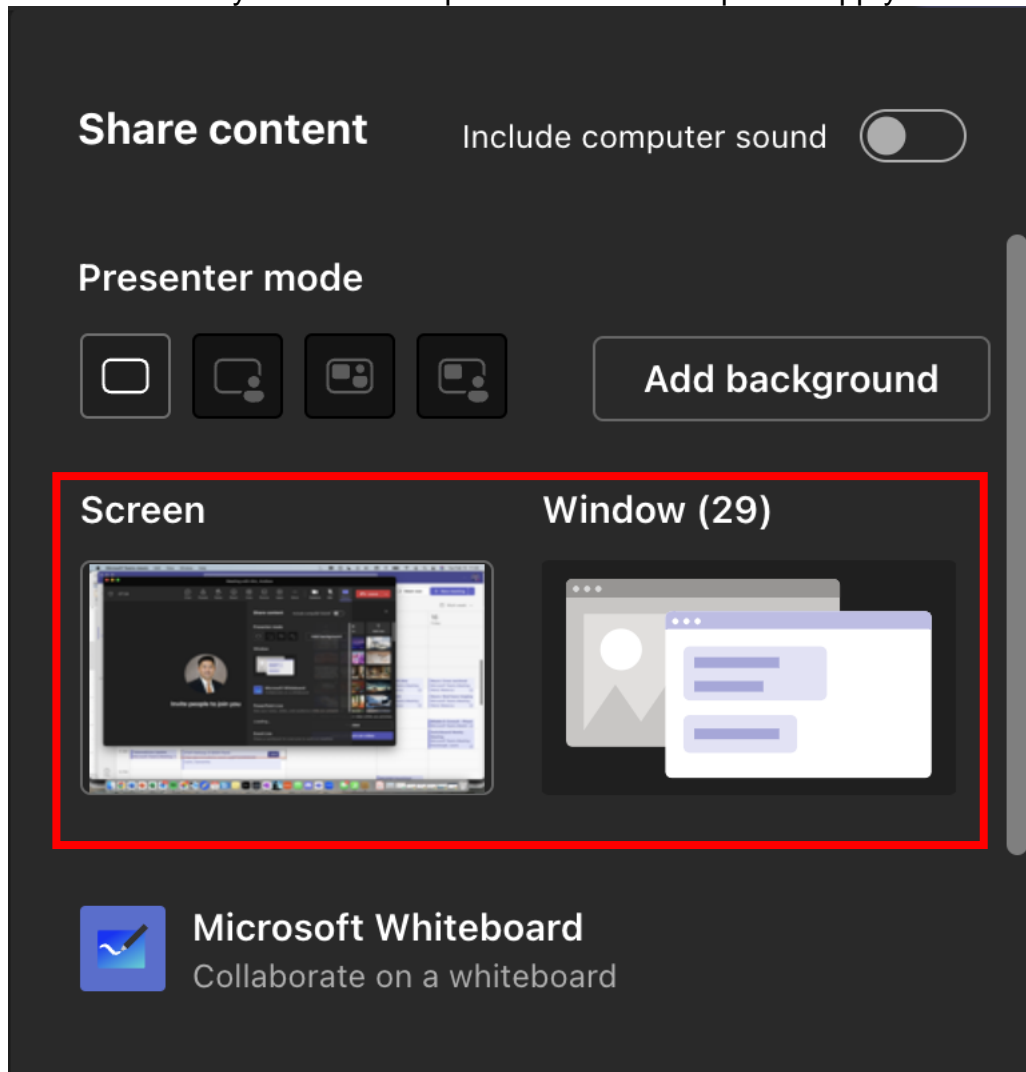
## Teams Settings: Sharing Content

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.



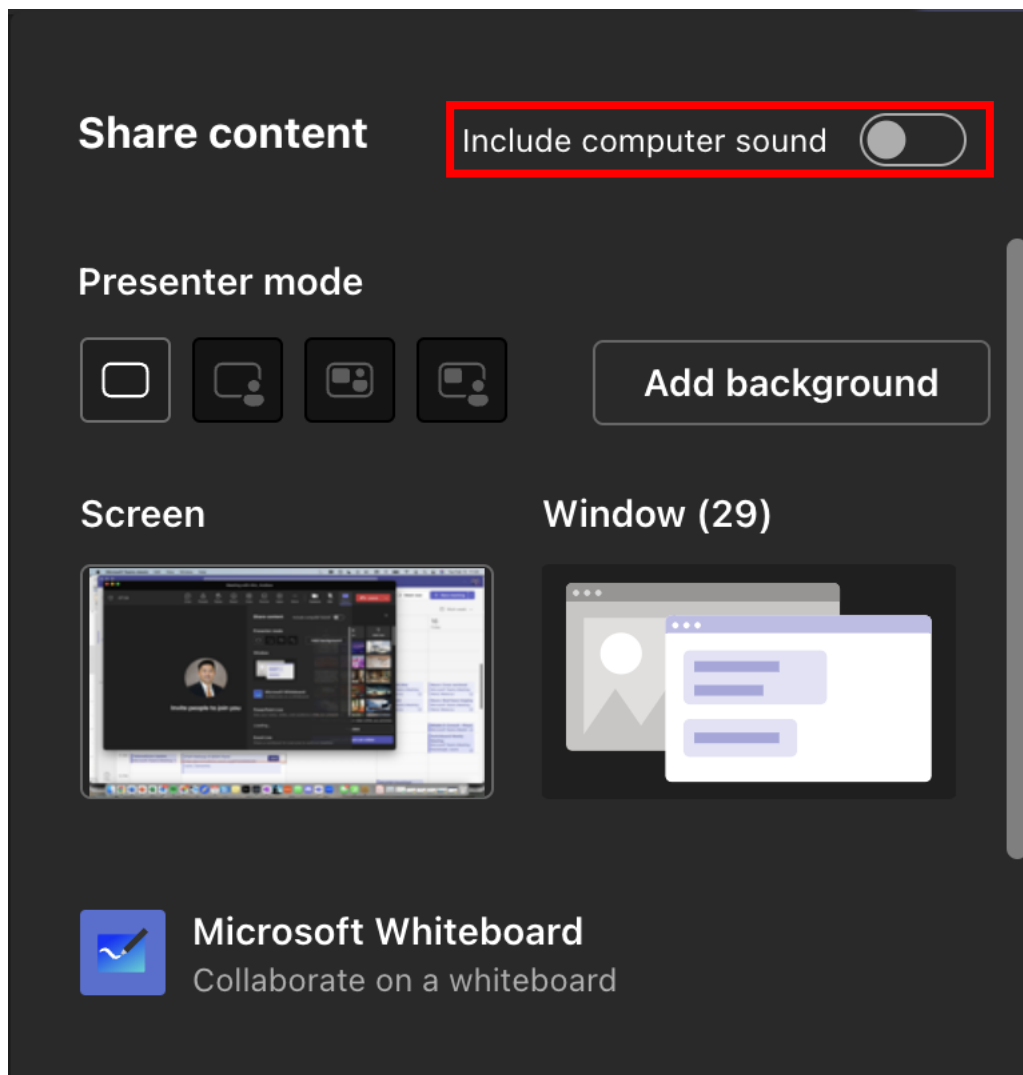


3. After you select what you want to show, a red border surrounds what you're sharing.

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

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

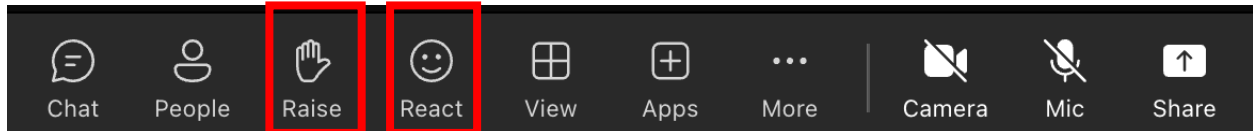
*Note: You can choose to include computer sound.*



## Teams Settings: Raise Your Hand and Show Reactions

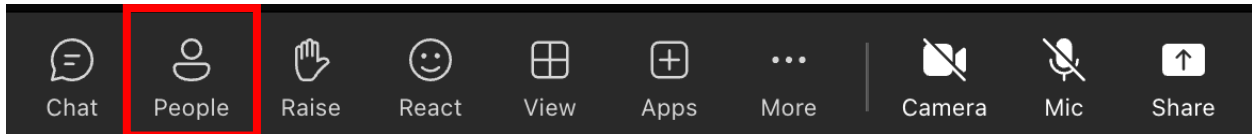
### 1. Under Reactions, choose how to engage in a meeting:

- 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.

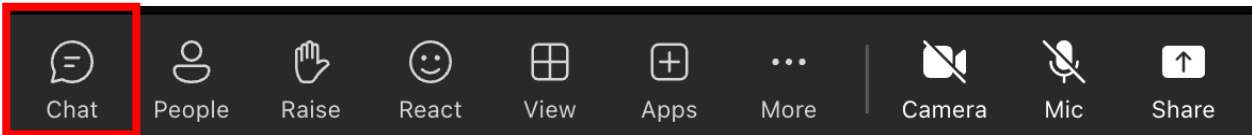


## Teams Settings: Other

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.*