Penn Medicine
Recording Switchboard Workflow

Table of Contents

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

Recording: Preset Settings

The <u>default settings</u> for the Recording workflow in Switchboard **<u>include</u>**:
- 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 <u>default settings</u> for the Recording workflow in Switchboard **<u>prevent</u>**:
- 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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Recording: Creating a Meeting

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

2. **Ensure the toggle to Teams has been selected.**
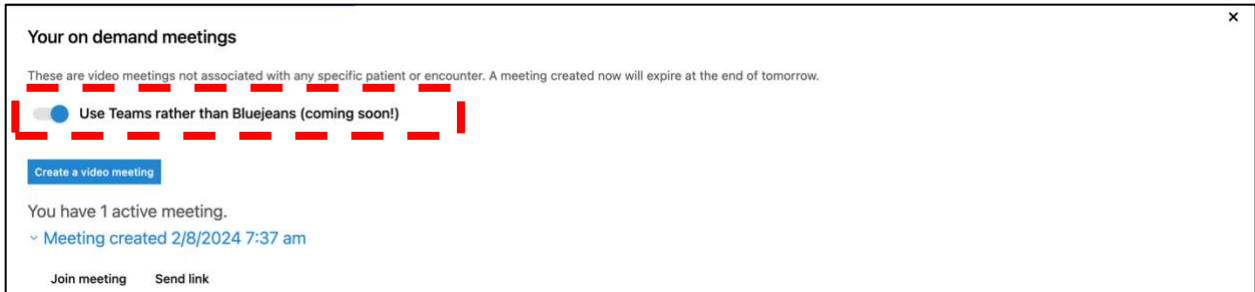
Note: If you encounter any issues with Teams and need to emergently create a meeting you can deselect the toggle to use BlueJeans. If not an emergency, and Teams is not working, please contact the Connected Health team.

3. **Select "Create a video meeting".**

Penn Medicine
Recording Switchboard Workflow
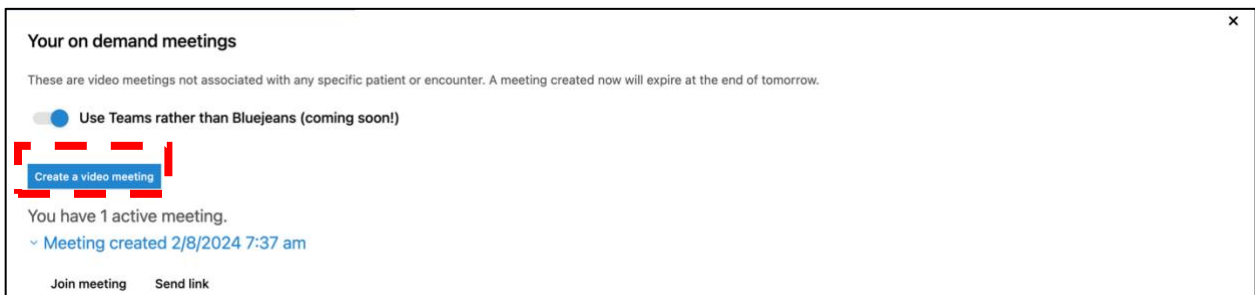
Recording: Managing Meetings

1. **Select specific meeting. "Recording Enabled" should be next to the meeting name. This indicates recording can be done for these meetings.**

*If you have been granted access for recordings, recording will be a feature you can access for any Switchboard On-Demand meeting.

2. **You can choose to "Add label for this meeting" to Title the meeting.**

3. **You can delete meetings by selecting "Delete Meeting".**

Recording: Sending the Meeting Link

There are two ways to enter contact information for the patient you'd like to send a link to: by **MRN** or **manual entry**.

MRN

Searching by MRN will automatically populate the email and mobile number from the patient's PennChart record.
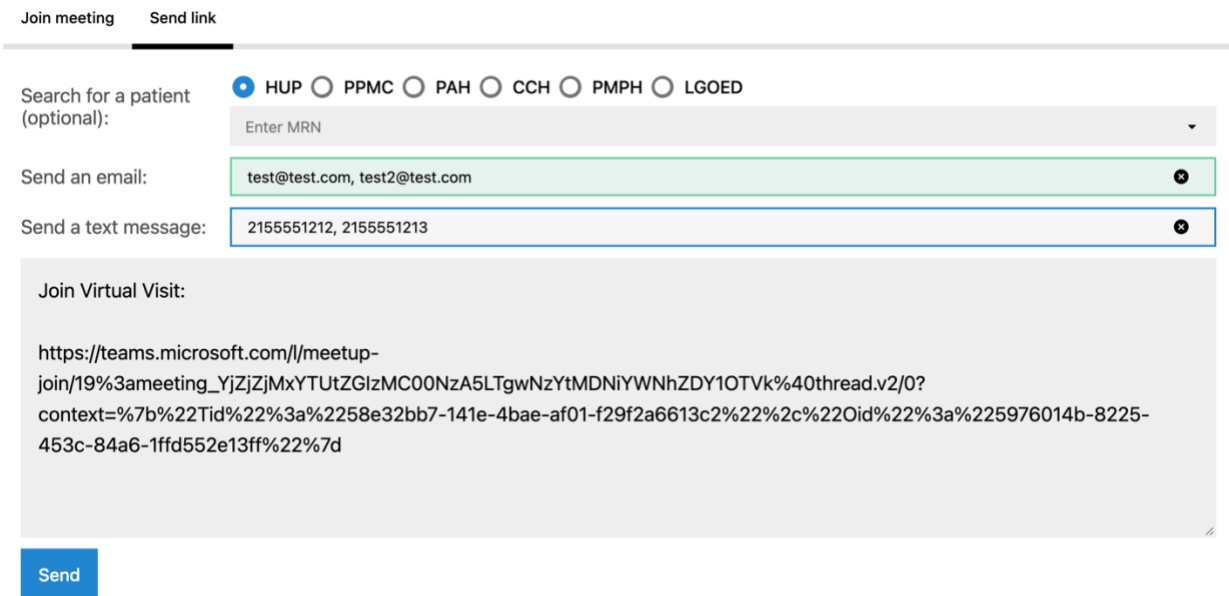
Manual entry

1. Manually enter the patient's email and/or mobile phone number.

Note: Multiple emails and phone numbers, separated by commas, can be entered for multiple participants or group sessions.

2. Verify or enter additional information.

3. Select Send.

Recording: 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_YjZjZjMxYTUtZGIzMC00NzA5LTgwNzYtMDNiYWNhZDY1OTVk%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.**

Penn Medicine
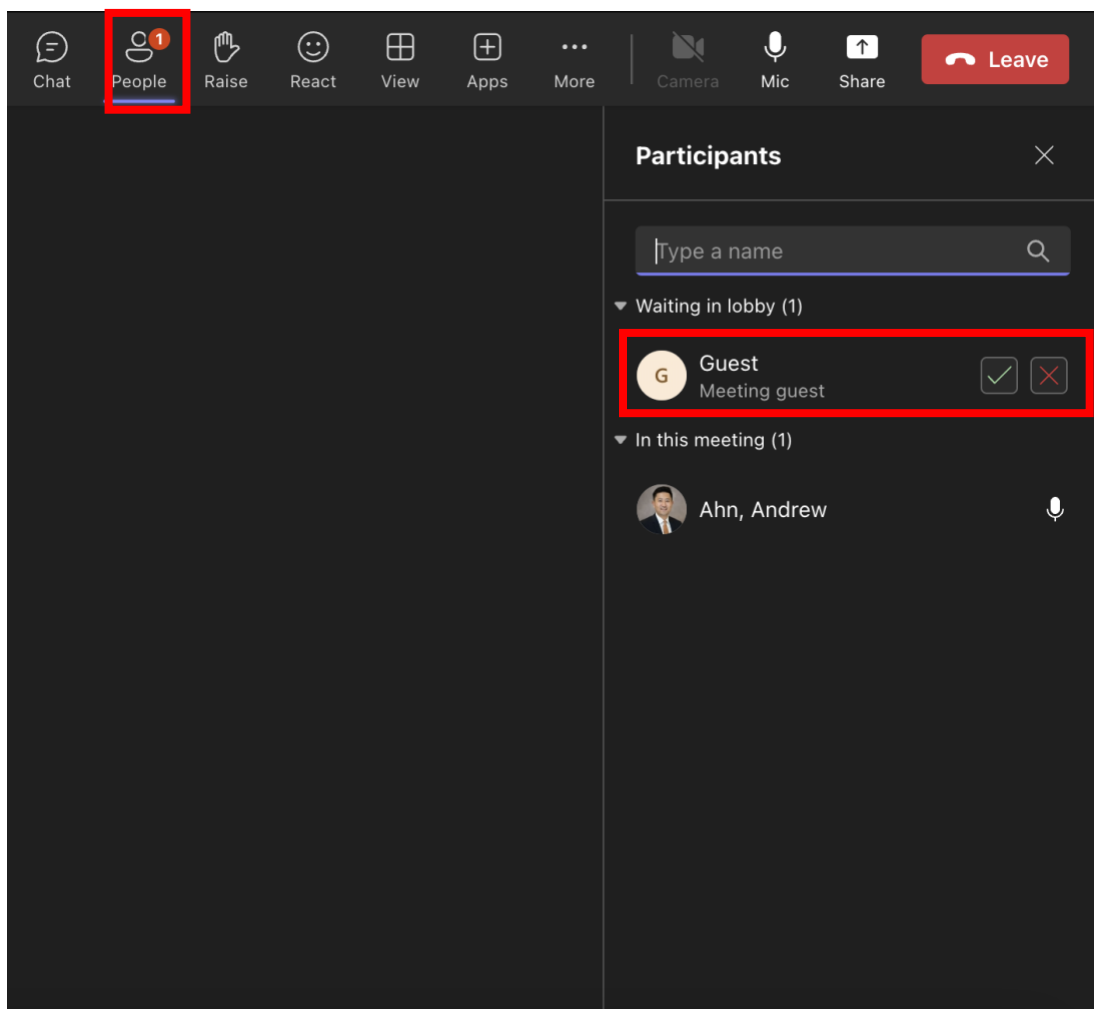Recording Switchboard Workflow

Joining Teams Meeting: Lobby

1. **You, the host (or co-organizer), need to join the meeting first.**

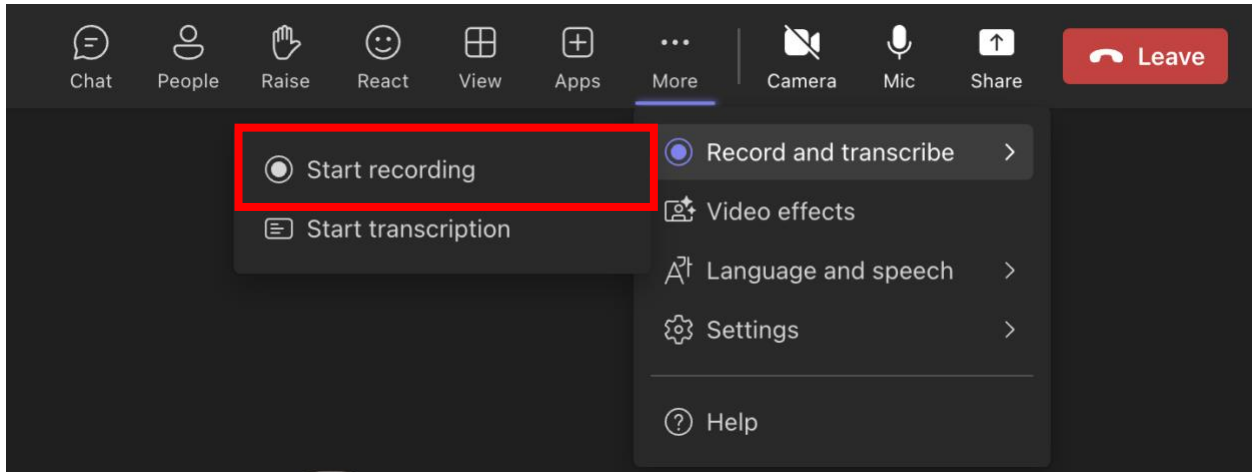2. **Then, admit the guest once they are joined.**
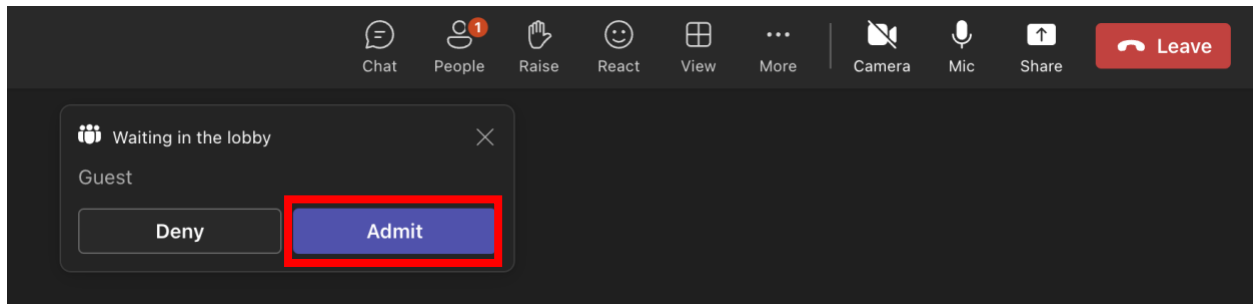
3. **If the lobby function doesn't auto-populate, you can select "People" and admit from there.**

Recording: Start and Stop

1. **To begin recording, select "More", "Record and Transcribe" and then "Start Recording".**

Anyone with a Penn account invited to the meeting can start and stop the recording. In order to prevent this feature (e.g. a Penn provider who is a patient), you will need to ask them to sign out of their Teams account and/or join from an external email account.

2. **Notify users that they are being recorded. The following notification should auto-appear in the meeting:**
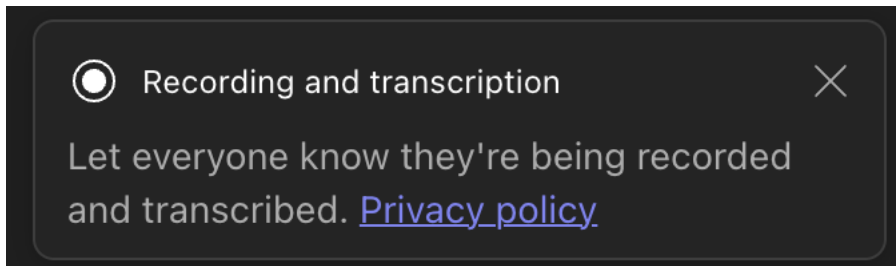
3. **When finished with the recording, select "More", "Record and Transcribe" and then "Stop Recording".**

Penn Medicine
Recording Switchboard Workflow

<u>Recording</u>: Accessing Your Recording

1. To access your recording, go to the chat.

2. You can access your recording by clicking on the ellipses in the upper right-hand corner. You can then "Open in Stream".

3. **Stream will house all of your recordings. You can share the recording via links from there. You can access Stream via the chat or portal.office.com.**

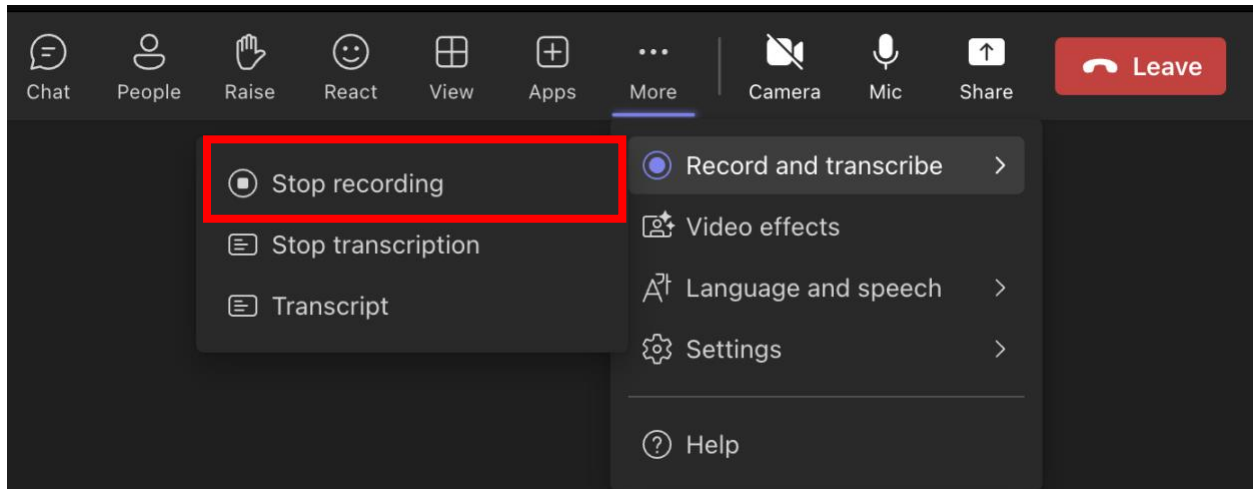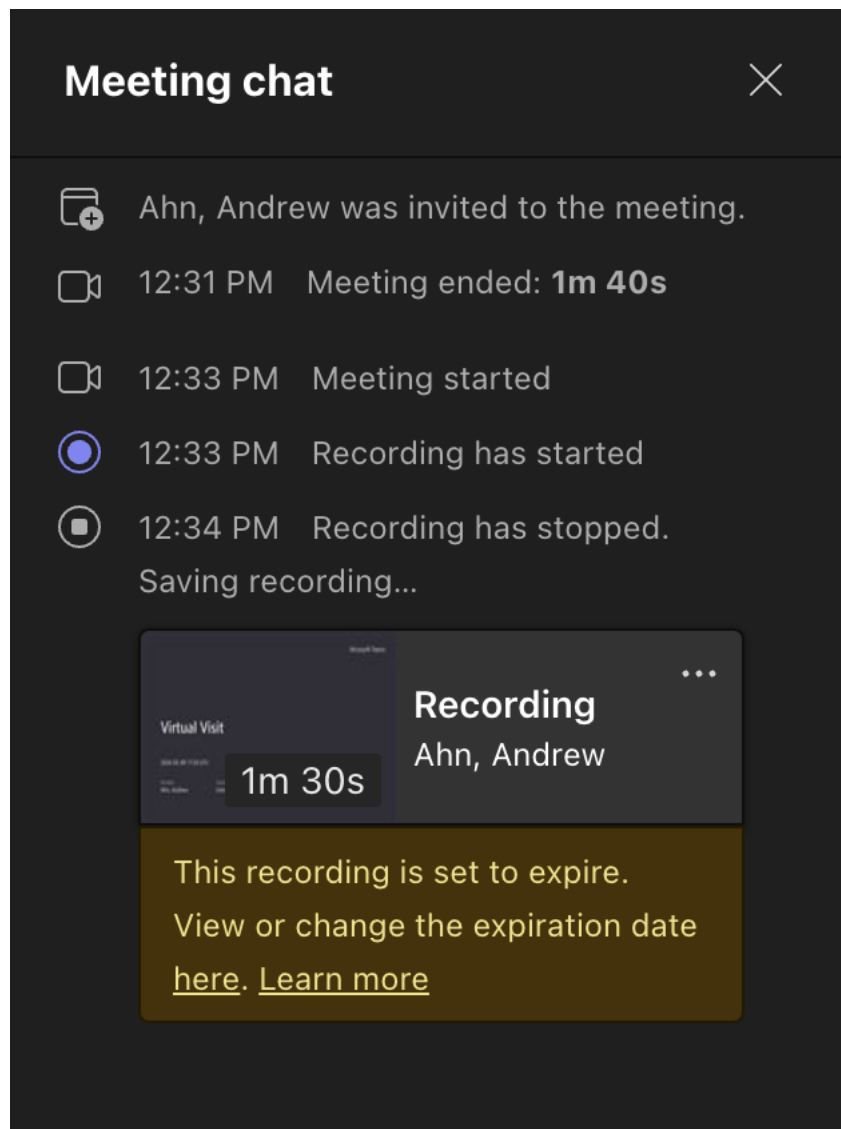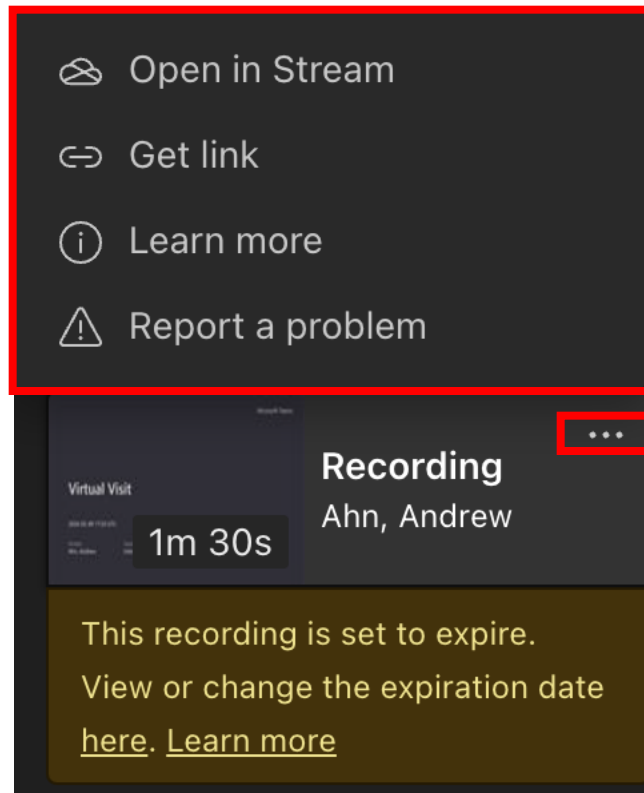***Recordings will stay in Stream for a default of 60 days.**

Anyone with a Penn account invited to the meeting can access the recording in chat. In order to prevent this feature (e.g. a Penn provider who is a patient), you will need to ask them to sign out of their Teams account and/or join from an external email account.

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".**
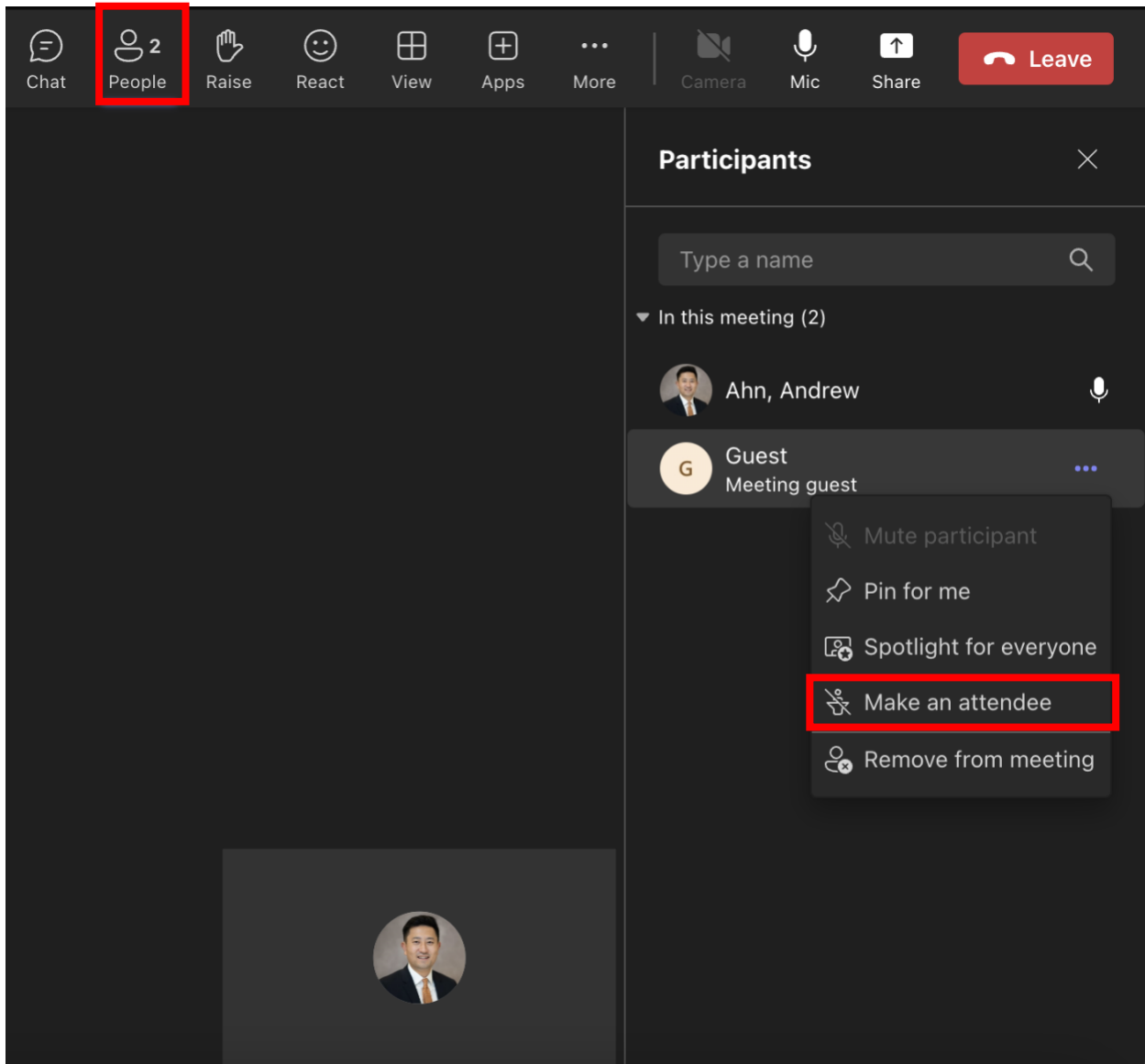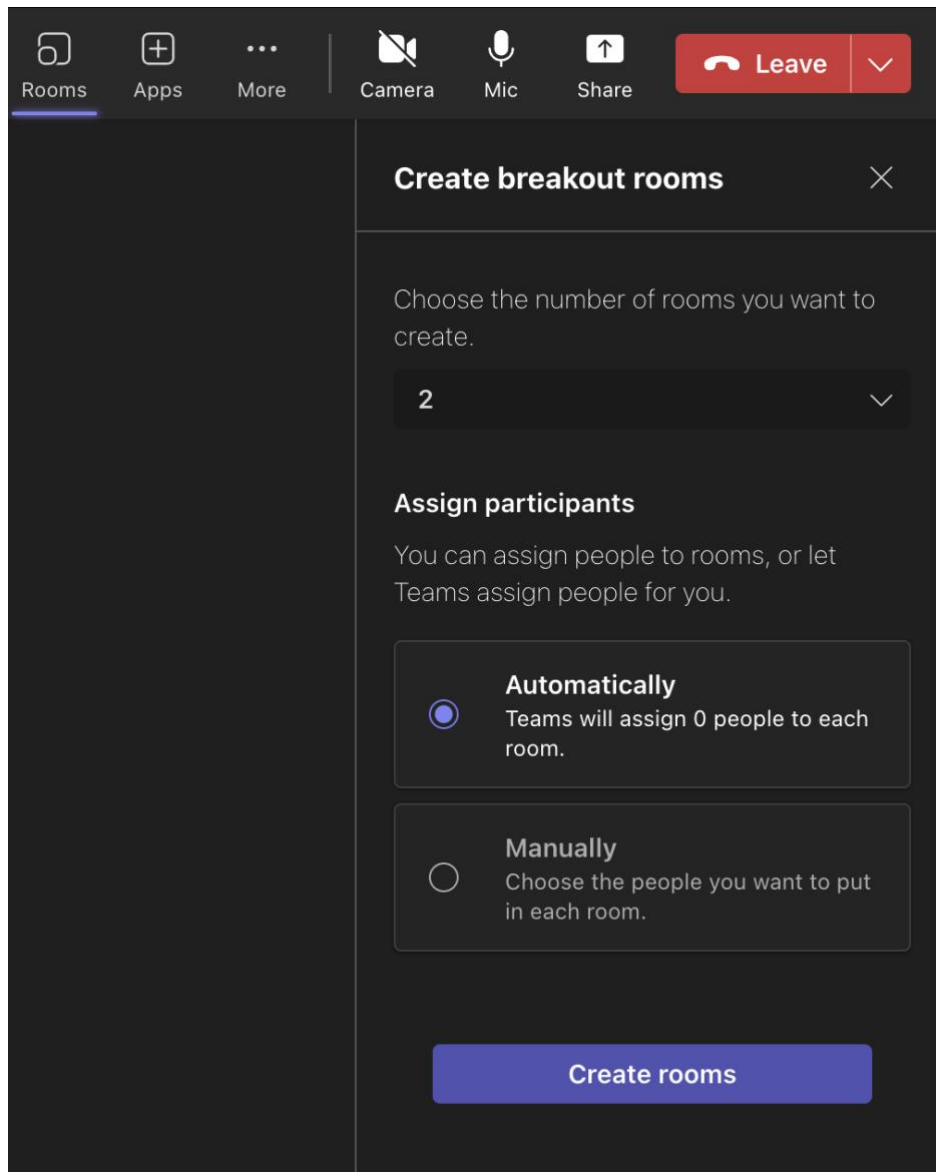

Note: You always can remove someone from a meeting (regardless of whether they are a presenter or attendee)

3. You now can control their video and mic capabilities.
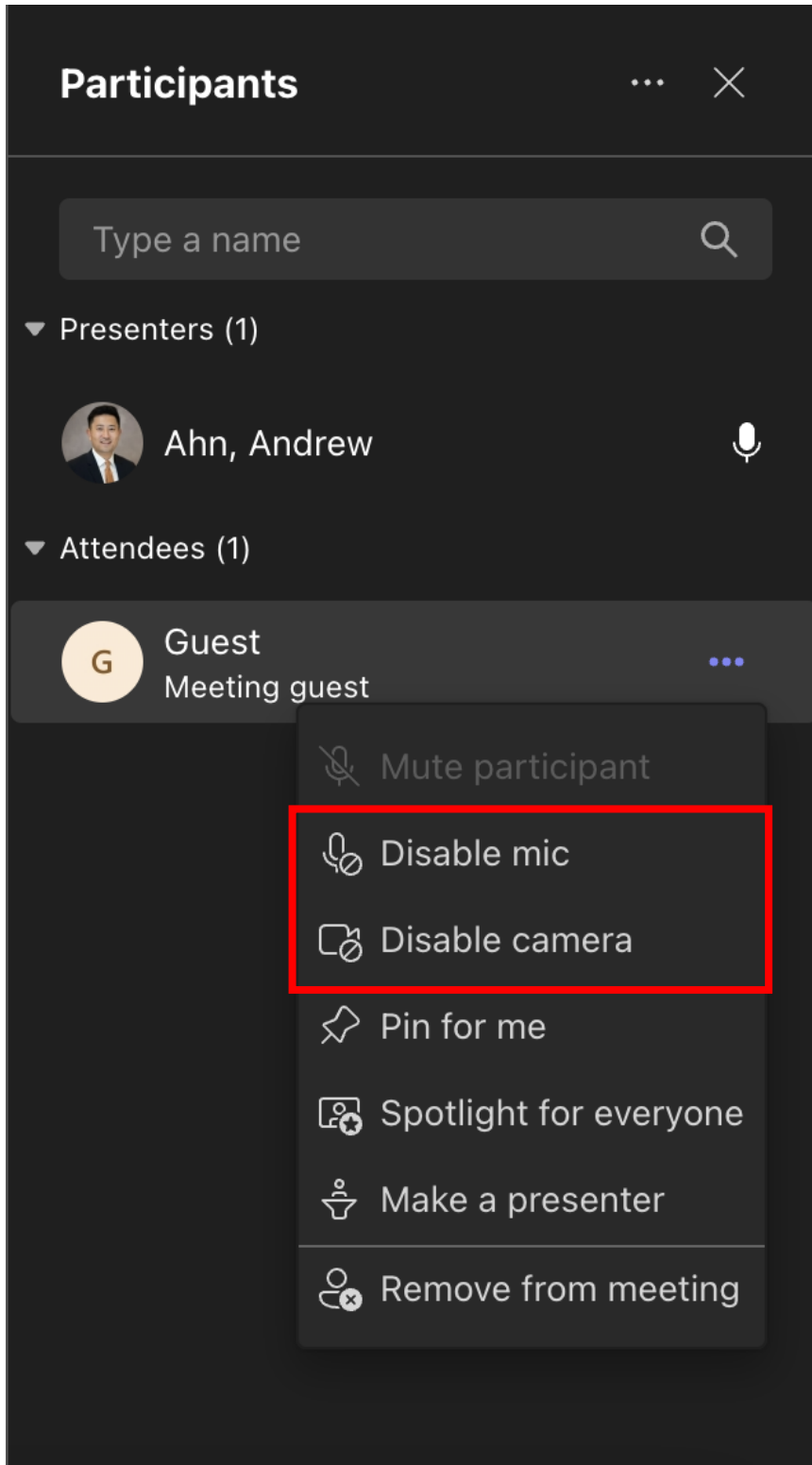
Teams Settings: Breakout Rooms

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)**
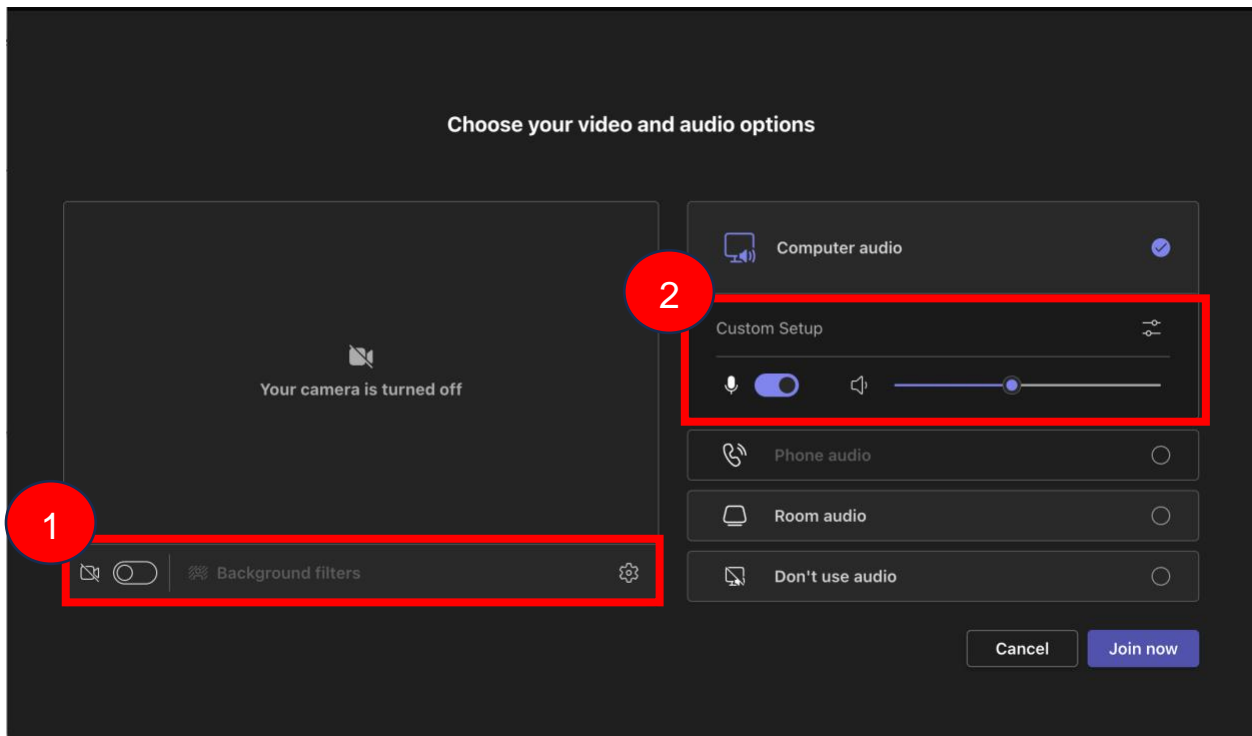
2. **Once in a meeting, you can adjust the same settings via the banner at the top of your screen.**
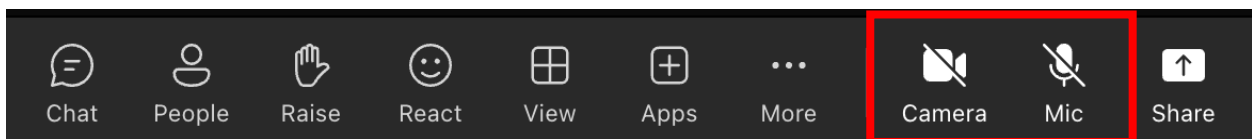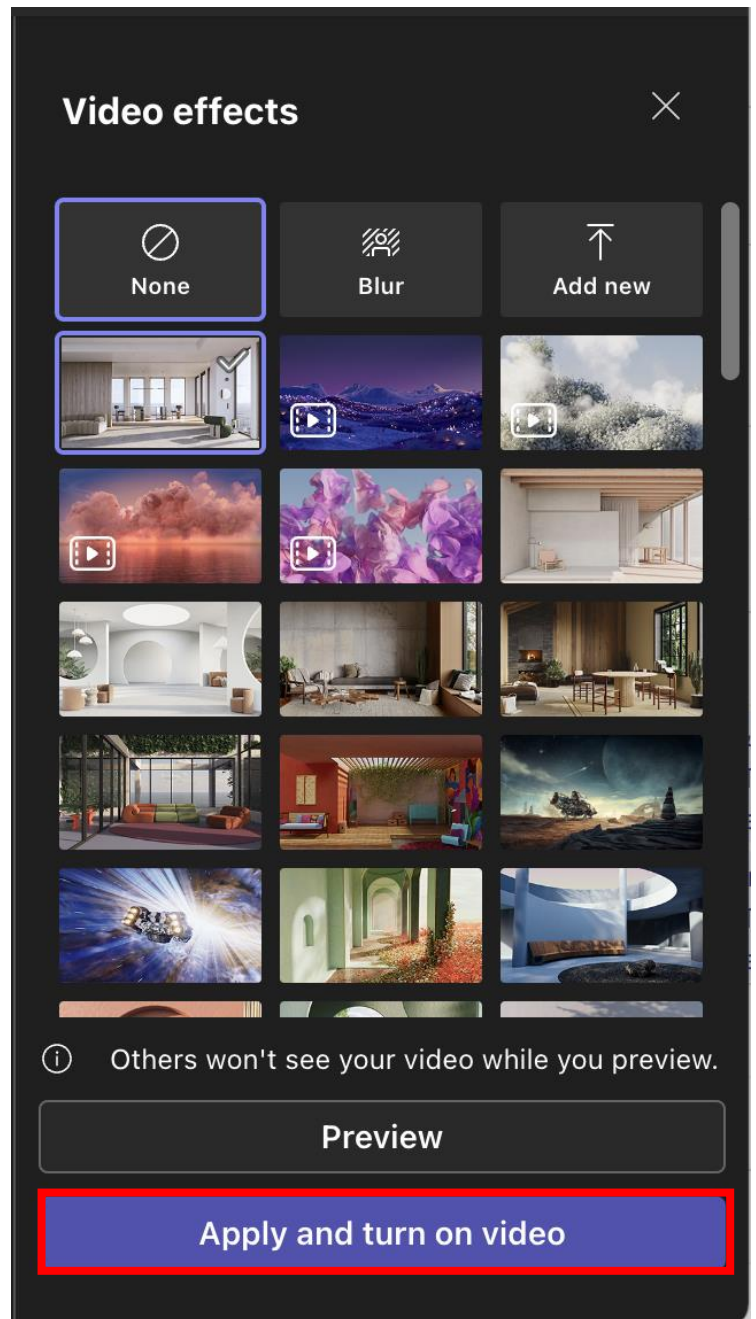
Teams Settings: Virtual Background

1. **Once in a meeting, you have the option to change your virtual background.**

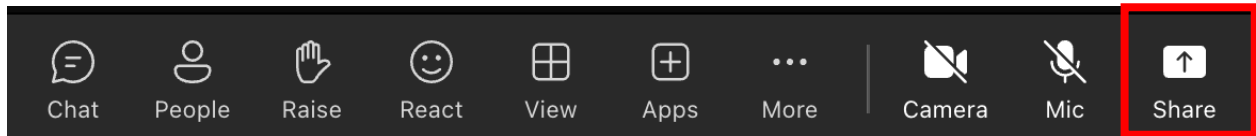2. **You can adjust your video settings (i.e. blur) by clicking "More" and selecting "Video Effects".**
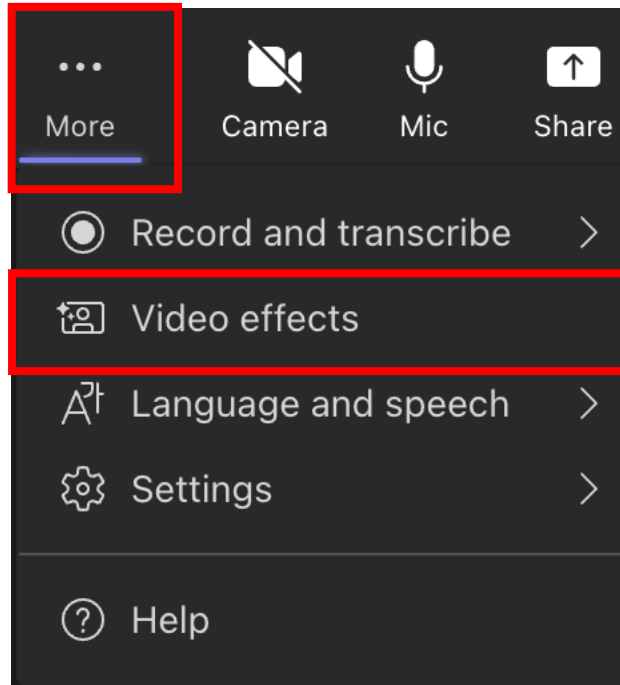
3. **Select the background that you would like to use.**

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.
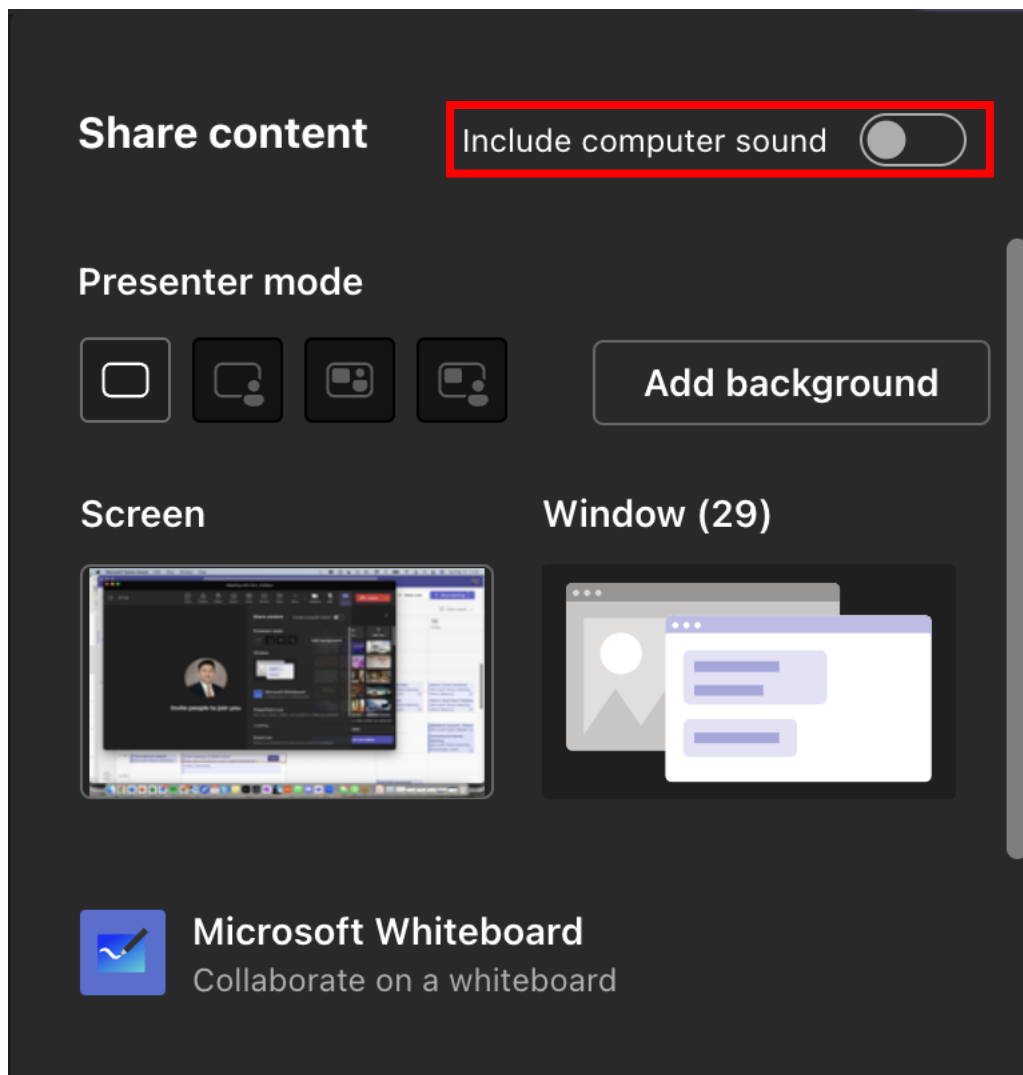
Penn Medicine
Recording Switchboard Workflow
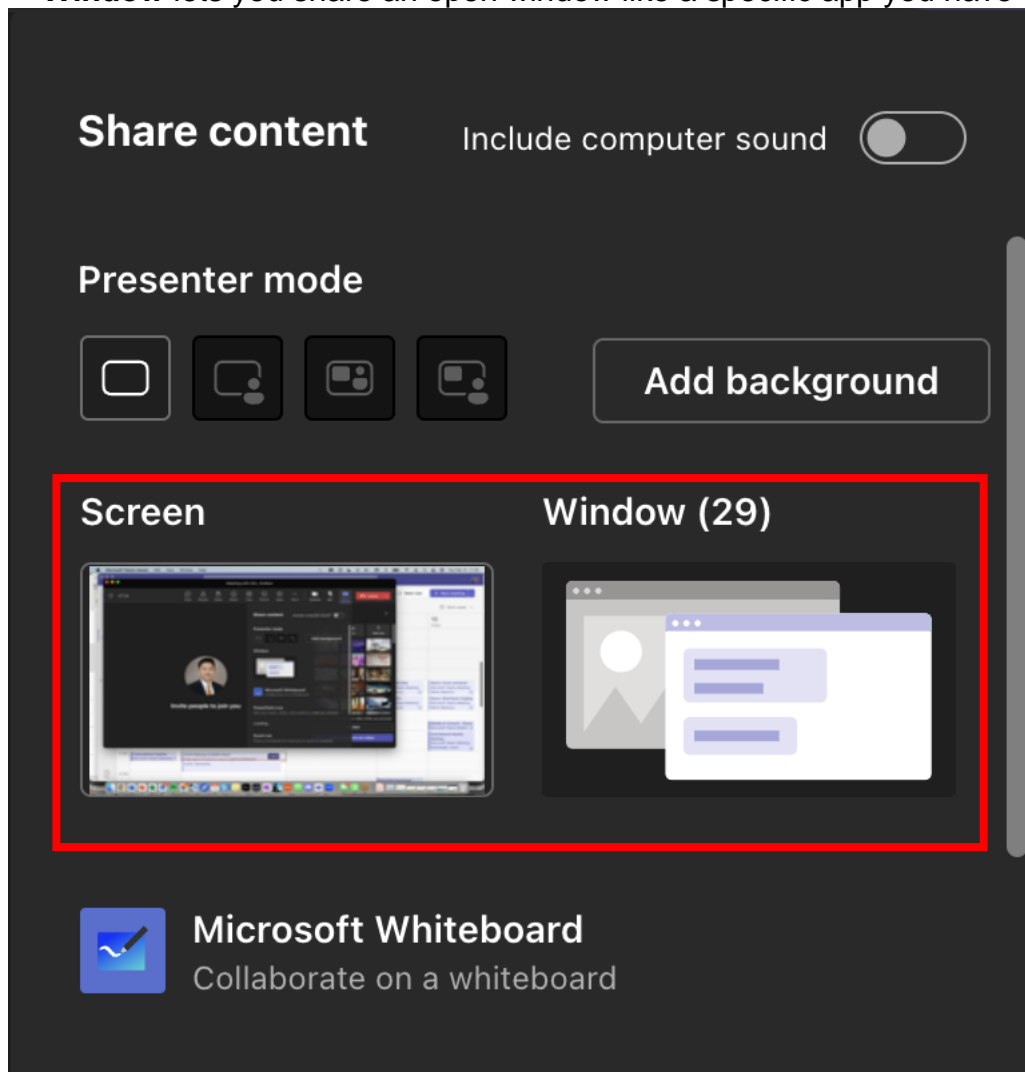
3. After you select what you want to show, a <u>red border</u> surrounds what you're sharing.

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

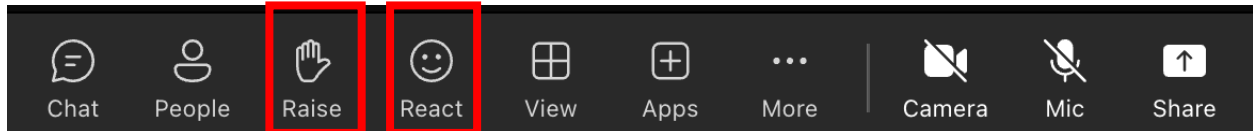**4. Select "Stop sharing" to stop showing your screen.**

Note: You can choose to include computer sound.

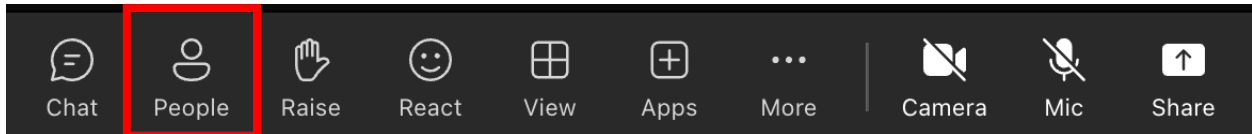## Teams Settings: Raise Your Hand and Show Reactions

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.

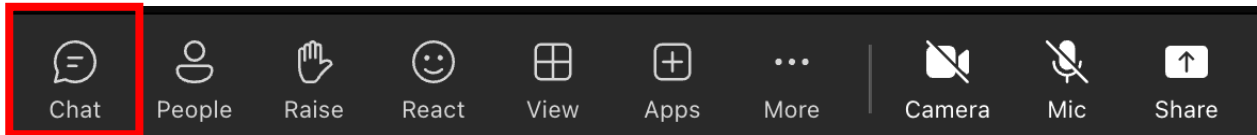   b. Choose a reaction like Applause or Heart to show how you feel.

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.