

## MS Teams for Group Meetings; a Quick Guide for Organisers

### 1. What group activities can I use Teams for?

MS Teams is a very useful tool for running patient group education or training meetings. Up to 300 attendees are able to attend at once and you can use the MS Teams ‘screen-share’ tool to share presentations and useful websites. The ‘Whiteboard’ and ‘Notes’ features allow you to interact with colleagues or patients and share learning easily.

Note: MS Teams should not be used for clinical consultations or where ‘restricted’ or highly sensitive confidential information is likely to be shared- including patient /client /staff sensitive personal information (i.e. mental health status). For more details on ‘restricted information’ see the HSE Information Classification Policy [here](#)

### 2. Do I need to set up an MS Team in order to run group meetings?

You don’t need to set up an MS team to run group meetings. Simply schedule a meeting (see 4.below) or series of meetings and send out the meeting link(s) to attendees via email.

### 3. Do participants need to have MS Teams to participate in a meeting?

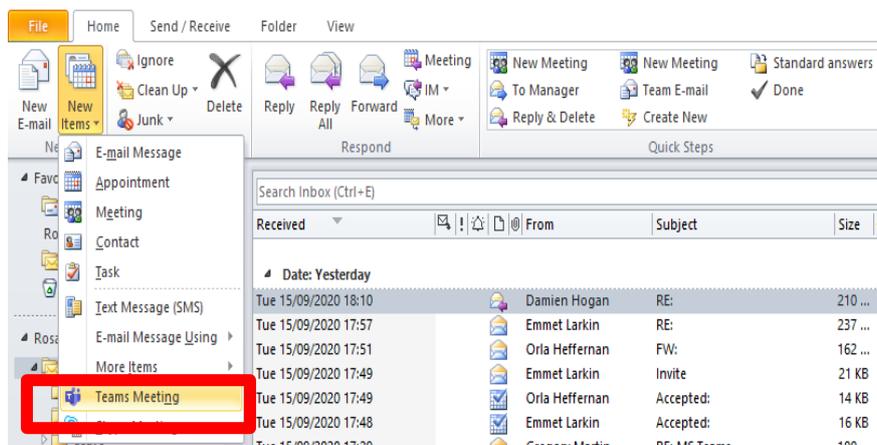
No. They only need to have internet access either on a computer or a mobile phone.

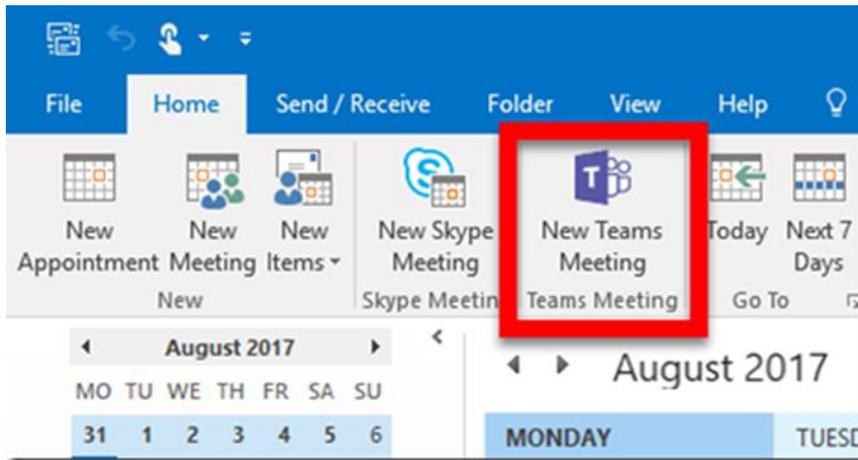
You should advise the patient that MS Teams works best with a Google Chrome or Microsoft Edge browser; they can download either one if they don’t already have it. When they receive the meeting invitation in their email inbox, the participant should be advised to:

**Click on the link** at the bottom of the email (see 4 below) that you send them i.e. ‘Join Microsoft Teams Meeting’ at the appropriate meeting time.

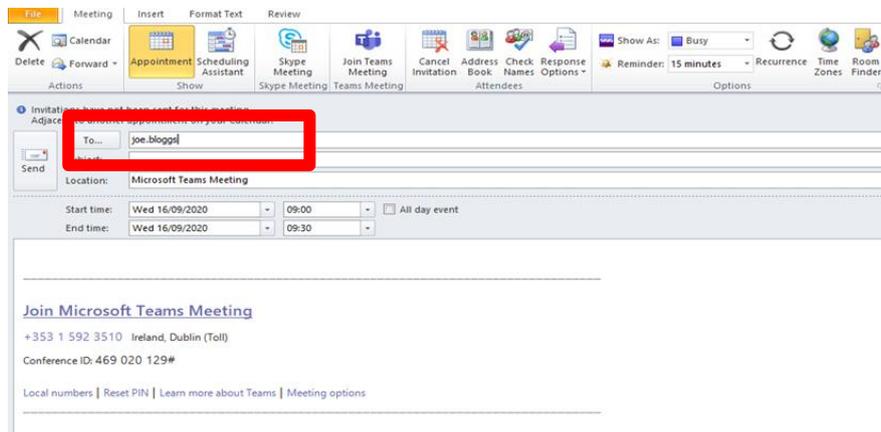
### 4. How do I schedule a meeting?

- (a) Go to your Outlook and click on ‘New Items’. Choose ‘New Teams Meeting’





(a) Send the meeting invitation to the required attendees' email addresses.



**5. Should I add patients/service users to an MS team, if speaking to same group regularly?**

No, you should never add patients to your team as this would potentially allow access to your files in the shared MS Teams file space. As above, you **can invite patients** to an MS Teams meeting or series of meetings **without** needing to make them members of the team.

**6. Do I need to contact the patient/service user in advance of sending a meeting invitation?**

You should always:

- Contact the patient/service user in advance and confirm that he/she consents to sharing their name and email address for purposes of meeting only
- When you are ready to send out your meeting invitation, include the following text in the body of the invitation

*Please note that by accepting this meeting invitation, you are deemed to have consented, as defined under GDPR regulations to email contact, and to sharing your name and email address for purposes of meeting participation only.*

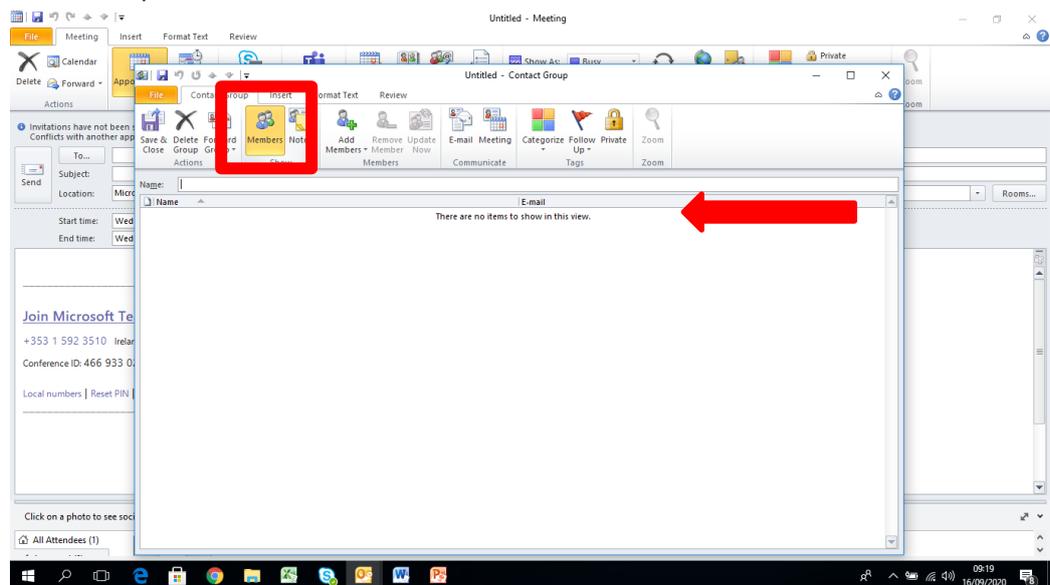
## 7. What if people can join from a mobile phone only?

Patients can join by any device e.g. phone, laptop or tablet with a modern browser- again Google Chrome or Microsoft Edge are best. Where practical it is a good idea to run a ‘test call’ with patients to ensure the connection is working and that they are comfortable with the tool.

## 8. I meet the same group every week. Do I have to type in all the email addresses every time?

No, once any external participants (non- HSE) have confirmed their consent to share their email address, you can create a ‘contact list’.

- Click on: **CTRL+SHIFT+L**
- Click on the **Add Members** dropdown button and choose: From **Outlook Contacts**
- Create a **name** for your group
- You can then copy and paste emails from a file e.g. Excel file of names/emails into the blank space shown.

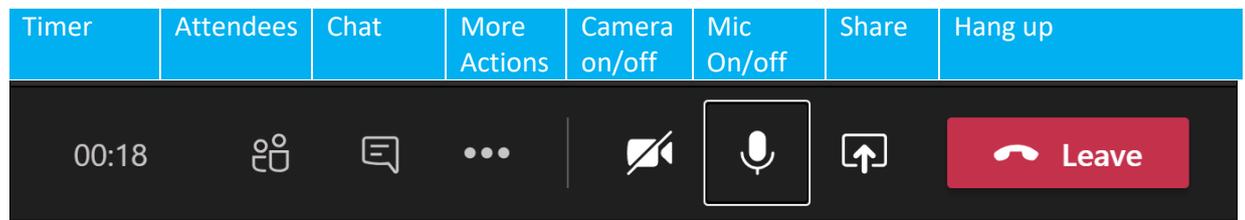


You can of course also select any HSE colleagues’ contact names from the organisational contact list.

The next time that you want to send an invitation to the group, you can simply click on ‘To’ and ‘Contacts’ and the list will be there ready for you to send.

## 9. What tools are useful for group meetings? Where do I find them?

Before a larger meeting, it is useful to practise using the various tools on your toolbar in a 'trial meeting' with a trusted colleague.



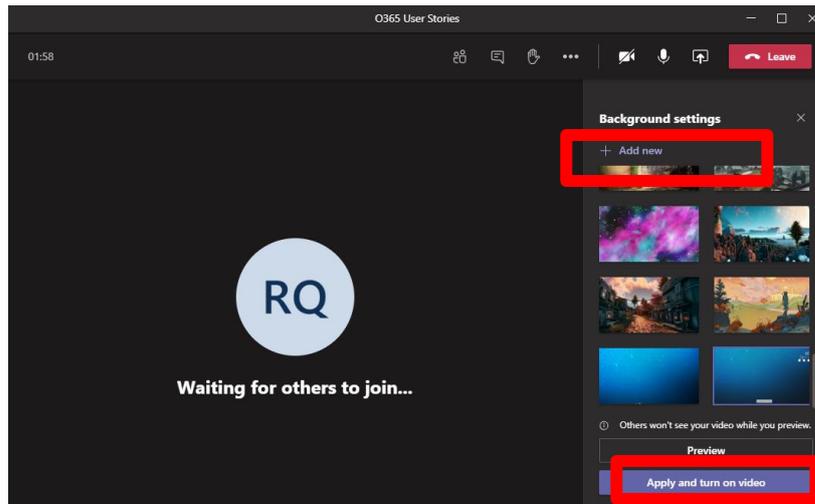
(a) In 'Attendees' you can see who is in the meeting, but the organiser (only) can also download an 'Attendee list'.

- During the meeting, select **Show participants** and choose **Download attendee list**
- The report will download as a .CSV file- can be opened in Excel. The .CSV file contains the name, **join time, and leave time of all meeting attendees.**
- Keep in mind that you'll only be able to download the attendance report while the meeting is in progress and participants are still present.

(b) **Apply Background Effects.**

With many staff now working remotely, you may be conscious of your surroundings. It is easy to create a professional-looking backdrop for your meeting in MS Teams e.g. create your own background using the HSE logo or another appropriate HSE image.

- Open any Teams meeting invitation link
- On your toolbar, go to '**More Actions**' and '**Apply Background Effects**'.
- '**Add new**' - e.g. upload a jpeg file with for example, a HSE logo.
- You can **preview** how the background looks before applying it.



**10. Can I record the meeting- I want to share the training session with people who couldn't attend?**

No-recording of MS Teams meetings is not currently permitted.

**11. Where can I go for further assistance?**

For MS Teams technical queries e.g. password assistance, contact [O365CoE.teamssupport@hse.ie](mailto:O365CoE.teamssupport@hse.ie)

For details of training sessions, see [here](#)