

How to Use Microsoft TEAMS for Running Groups

All staff may use their county issued **Microsoft TEAMS** or DOXY.ME account for groups with clients.

*****DO NOT USE YOUR OWN PERSONAL ACCOUNT.*****

(Contractors may be able to use their own personal accounts but should consult with their organization first about what video conferencing tool is acceptable).

- The regular TEAMS account requires a smartphone or web browser to login to the meeting.
- A Microsoft TEAMS meeting can accommodate up to 250 people.

Preparing for Your Group

- Not all of your clients have video capability, and some will be calling into the group.
- You will need to request a TEAMS CONFERENCE CALL PHONE NUMBER prior to your group if you don't already have one associated with your TEAMS account. You only need to make this request once, after that any TEAMS meeting you create will automatically generate a call-in number.
- QM has requested TEAMS CONFERENCE CALL PHONE NUMBERS for current group providers. If you are unsure if your account already has a conference call phone number, please request a TEAMS CONFERENCE CALL PHONE NUMBER from your supervisor and send this request to: HS_BHRS_ASK_QM@smcgov.org

Documentation Tip

- **The Avatar Face-to-Face Progress Note:** If you see the client on video document this service location as "Telehealth." The minutes go in the "Client Present Face-to-Face" category. If your client calls into the meeting and you cannot see them on video, document this service location as "Phone." The minutes go into the "Other Billable Service Time" Category.

Create the meeting using OUTLOOK or TEAMS

- You can create the meeting in either OUTLOOK or TEAMS by selecting your calendar, clicking on the date and time of your meeting in the calendar and then selecting "New Teams Meeting." A meeting email will generate.
- (You can make your meeting recurring, but if you do, the information in the Teams chat will remain visible to all participants in all past and future meetings).
- ***It is better to make each meeting a separate meeting not recurring if you are worried about the chat history. You might also ask people not to chat.**
- The meeting location will self-generate as: "Microsoft Teams Meeting."
- You will need to **first send this email to yourself to create the meeting in your calendar.**

Send	To...	Your county email address		
	Subject			
	Location	Microsoft Teams Meeting		
	Start time	Wed 6/24/2020	3:00 PM	<input type="checkbox"/> All day event
	End time	Wed 6/24/2020	3:30 PM	

- Type your email address in the “To:” box, add your subject (Ex: Pet Therapy Group) and hit send. This will make the meeting show up on your Outlook and Teams calendar.

Inviting Clients and Sending them the Meeting Information

- Open the meeting you just created by double clicking on the meeting in your Outlook calendar. Copy the meeting information that self-generated. **DO NOT FORWARD THIS INVITE OR SEND TO CLIENTS.**

[Join Microsoft Teams Meeting](#)

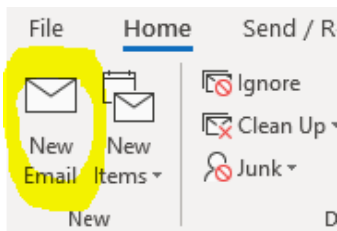
+1 650-761-6481 United States, San Jose (Toll)

Conference ID: 767 321 597#

[Local numbers](#) | [Reset PIN](#) | [Learn more about Teams](#) | [Meeting options](#)

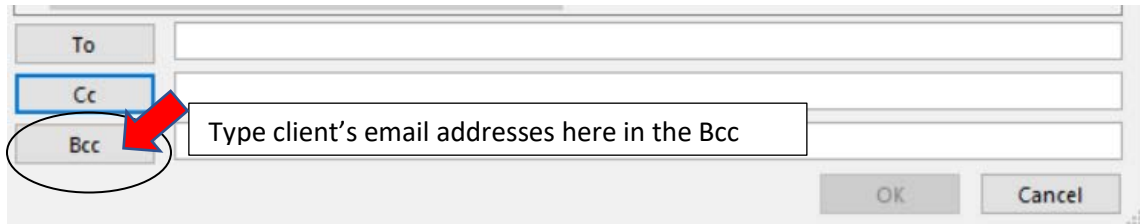
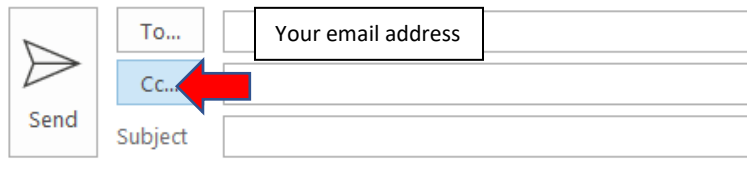


- **Exit out of the meeting appointment and start a new email in Outlook.**



- Paste the meeting information you just copied into the body of the email. You can also include any additional details or information in the body of the email. Such as:
 - If you call into the meeting other participants will see your phone number.
 - If you chat in the group, others will see your chats.
 - The chat history is automatically saved for each meeting. Please don't chat if you do not want others to see your chats.

- If you turn your video on others will see you.
- **Don't forget to:** Attach the Telehealth Informed Consent Form to the email as this will need to be completed by each participant.
- Address the "To:" to your own email address.
- **YOU MUST BCC ALL PARTICIPANTS TO KEEP EMAIL ADDRESSES HIDDEN AND PROTECT PRIVACY**
- **To do this:** click on Cc: to open the Bcc section



- Select "OK" to return to the email.
- **The subject line: MUST include #sec#**

Subject

- **Send your email.** You clients will now have the information they need to join the meeting.
- *Note: If this is not a recurring meeting, you will need to follow these steps each time to provide your clients with the correct Teams meeting information. Each meeting will have a different meeting number if it is not recurring.*

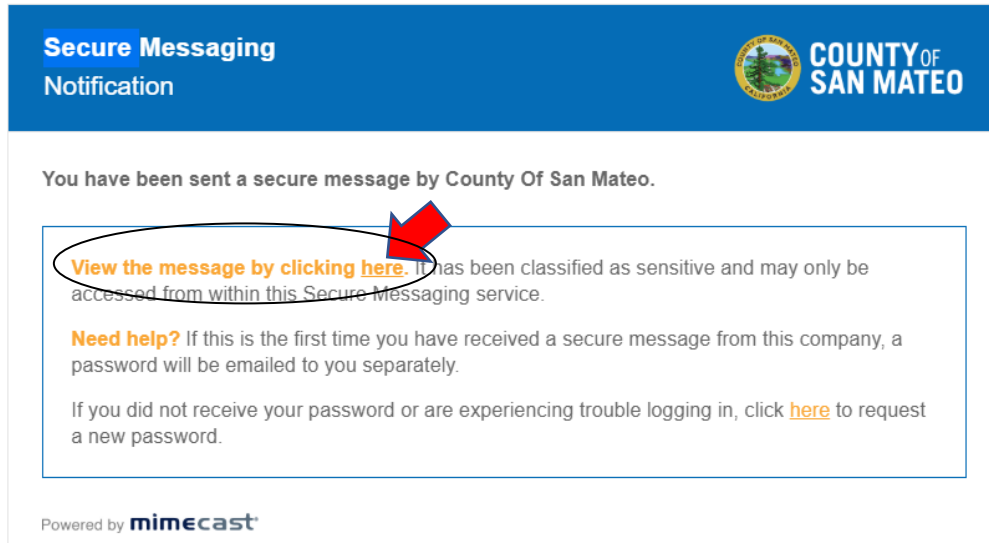
Instructions for Clients

- **The client will get a secure email from you**

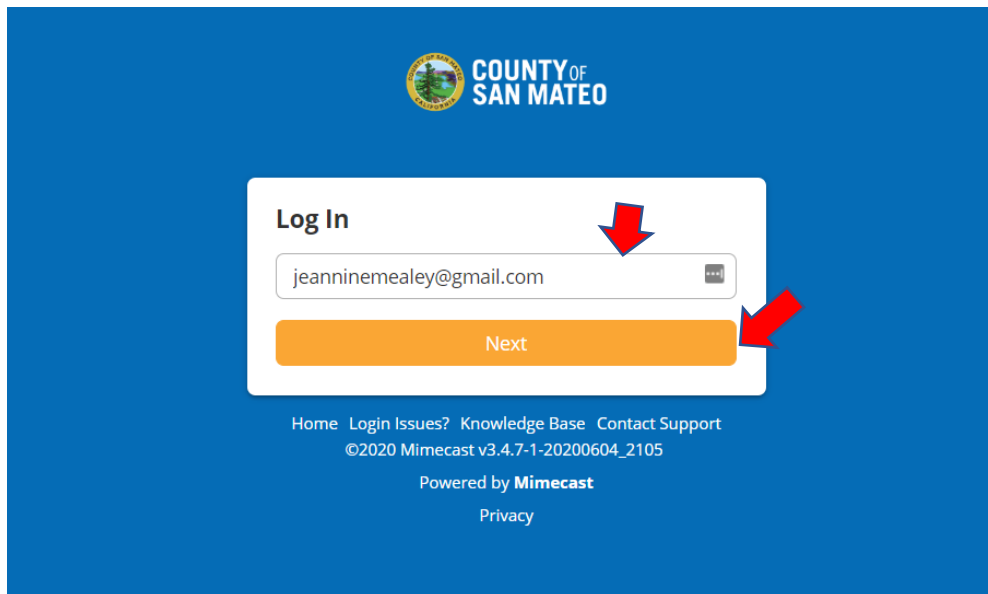
☐ ☆ ▶ Jeannine Mealey

Secure Messaging Notification - Secure Messaging Notification You have been s

- The client will click View the message by clicking [here](#)



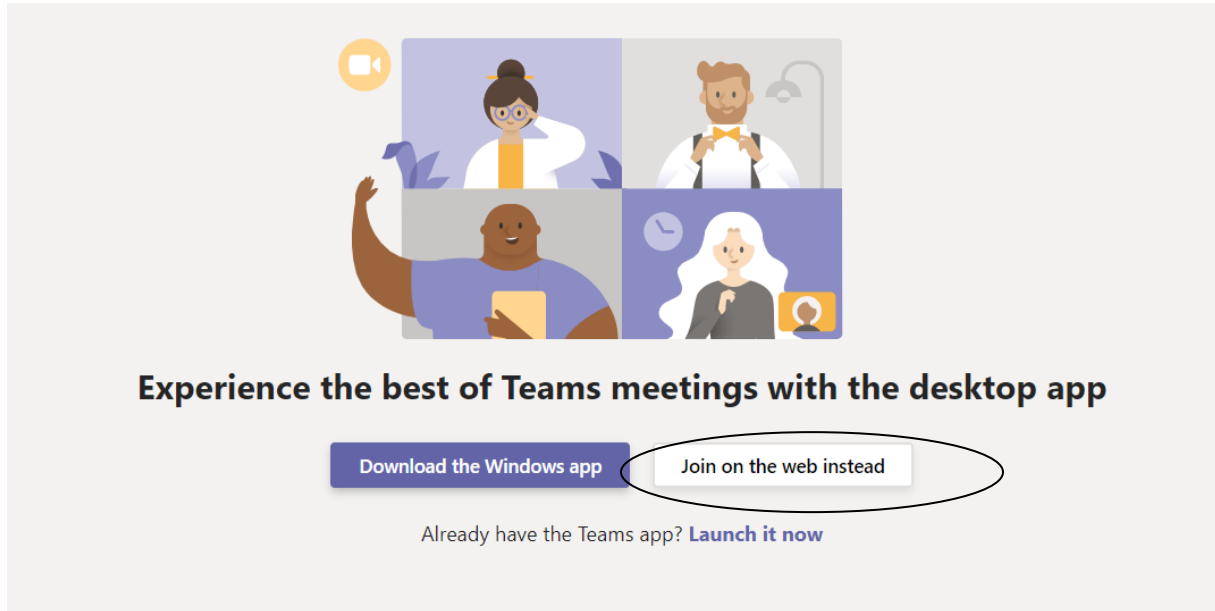
- The screen below will open. The client types in their email address and clicks next. The client will be asked to set up a password.



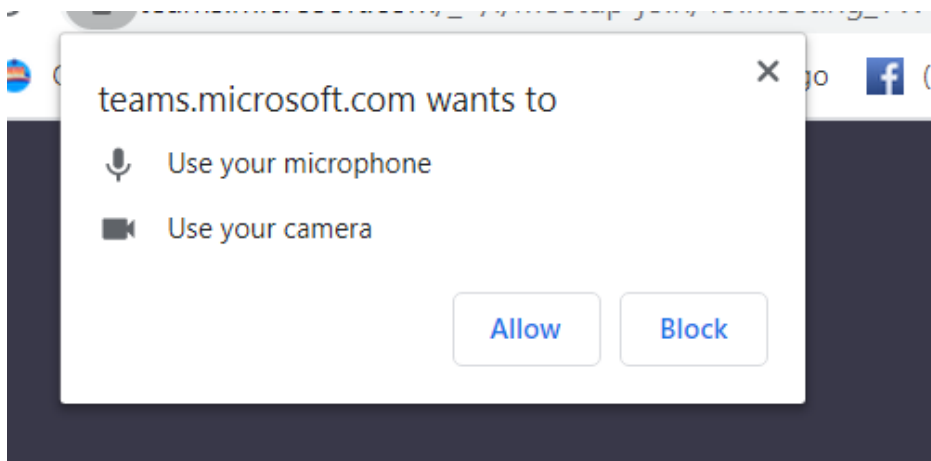
- Client will be taken to the secure server and can access your email.
<https://smcgov.login-us.mimecast.com/m/secure/app/#/inbox>

Joining the Meeting

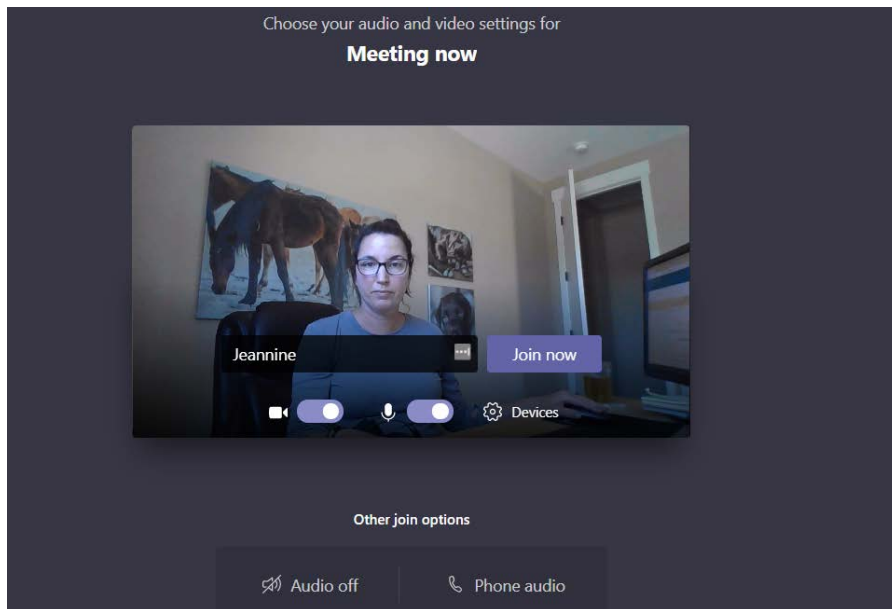
- The client will click on the link that you emailed them: **Join Microsoft Teams Meeting**
- They can download the Teams app if they want, or they can **“Join on the Web instead.”**



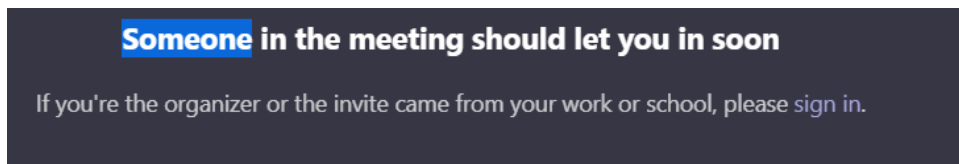
- They will be prompted to Use your microphone and camera, **click ALLOW**. You can block your video later.



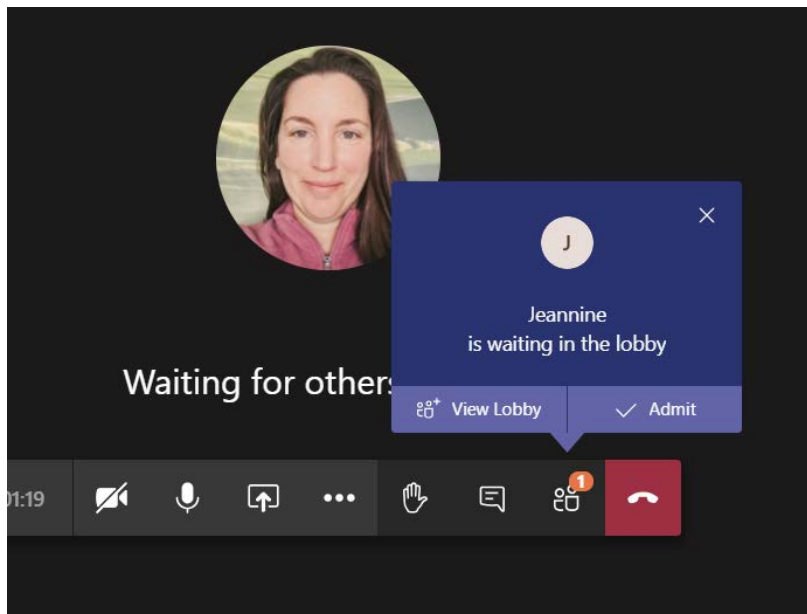
- The client will write in their name and click **Join now**.



- The client will be placed in the lobby




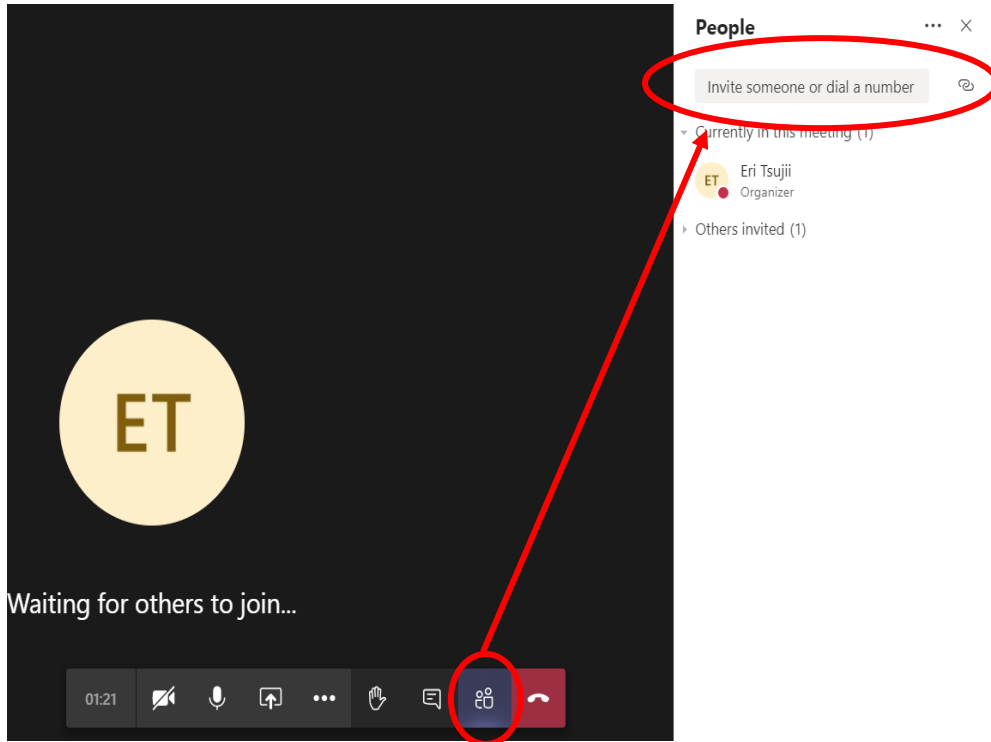
- The facilitator will see this prompt, **click Admit**




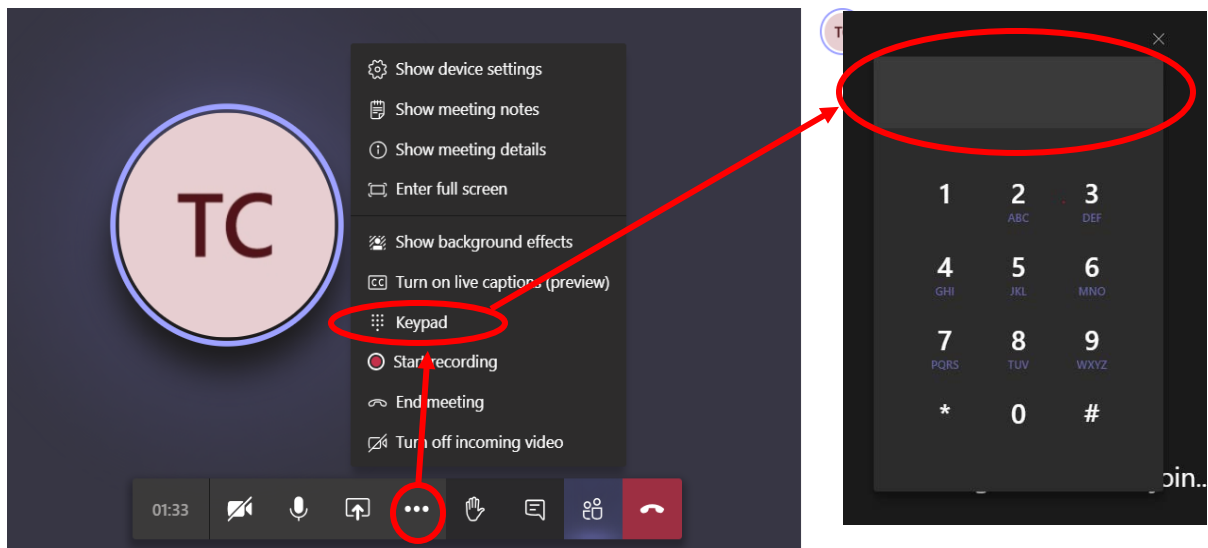
- You should go over the group rules at the beginning and show people how to mute themselves and block their video.

Adding a Participant via Phone Call (without video)

- You may want to add a participant to an existing meeting by calling their phone number. There are two ways to do this.
- Option 1: Use the participant icon  on the task bar at the bottom of your screen and enter the phone number in the box that reads “Invite someone or dial a number.”



- Option 2: Click on the ellipses icon  on the task bar, and select “Keypad.” When the keypad pops up, then type in the phone number of the person you wish to call.



How to Blur Your Background

- When using TEAMS, you may want to blur out your background. To do this click on the ellipsis (3 dots) and select “Start video with blur.”

