

MS Teams

Service User Group Facilitator Guide

SMARTER  TOGETHER



Introduction

MS Teams is a great tool for running patient group education or training meetings. Up to 1000 attendees can attend, and the MS Teams ‘screen-share’ tool allows you to share presentations and useful websites.

It’s important to note that MS Teams should never be used for 1:1 clinical consultations or where ‘restricted’ or highly sensitive confidential information is likely to be shared- Attend Anywhere should be used. For more details on ‘restricted information’ see the HSE Information Classification Policy [here](#).

If you cannot find the answer to your query below or would like further support in setting up your group, please contact Rosaleen.quinlan@hse.ie

Please also note that new features and functions are added to MS Teams very regularly; the key updates affecting HSE colleagues will be communicated via regular ‘Top Tips’ to all Teams users.

Wishing you success with your group meetings.

HSE Office 365 Team



What service user activities can I use Teams for?

MS Teams is a useful tool for running patient group education or training meetings and increasing patient engagement. Up to 1000 participants can attend; resource documents and videos can be shared, and workshops can be facilitated for smaller groups (using Breakout Rooms).

What do I need to organise an MS Teams meeting?

You need an HSE MS Teams licence. This is available to HSE staff that are on the national HealthIrl domain.

How do I get an HSE MS Teams licence?

1. Apply online [here](#).
2. Download the MS Teams desktop app to your desktop or laptop computer; once you have your HSE MS Teams email and password, use your app to log into MS Teams. Note: as organiser, you should always use the app, rather than 'continue via browser' when accessing MS Teams- certain features e.g. breakout rooms are only available via the app.

Can I download MS Teams on my mobile phone?

If you have an HSE managed mobile phone(only), yes.

Is there training available?

Yes, details of all general training sessions can be found [here](#). It is recommended that you attend a training session before setting up your group meetings.

What service user activities can I NOT use Teams for?

As above, MS Teams should never be used for 1:1 clinical consultations or where 'restricted' information is likely to be shared.

Facilitator judgment should be exercised around attendees disclosing sensitive personal details beyond the scope of the session i.e. information more appropriately shared at a medical consultation.

Do service users need to have MS Teams to participate in a meeting?

No. They only need to have internet access either on a computer (desktop or laptop or tablet) or a mobile phone. A desktop/laptop is preferable if available as functionality may be limited on a mobile phone.

Should service users download the MS Teams app on their device or mobile phone?

No. There is no need for service users to download the MS Teams app onto their device.

What does the service user need to join the meeting?

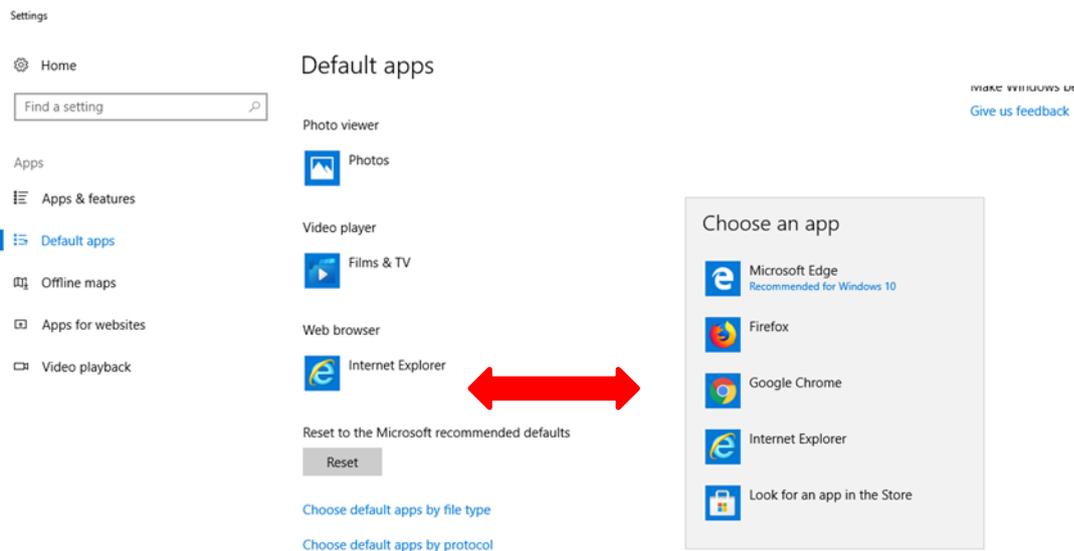
The service user needs only an internet connection and an email address accessible on the device. Advise the service user that you will email them a meeting link, and that they should click on that link to get into the meeting.

NB: 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. MS Teams is not supported by Internet Explorer; if they currently use this browser, they should change it.

How does the service user know what browser he/she has?

To check what browser is currently being used and/or to change it, you can advise the service user to:

- Enter 'default apps' in the 'search bar' at bottom left of their screen
- Scroll down to 'Web browser'. If the web browser is Internet Explorer, as seen below, right-click on the Internet Explorer icon and select Google Chrome or Microsoft Edge instead of Internet Explorer.
- If no other options appear, Google Chrome or Microsoft Edge can be downloaded.





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

No, adding service users to your team is not permitted 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.

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

Yes. 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
- Conduct a short 'test meeting' with the service user to ensure that they can join a future 'real' meeting
- Confirm that they have a strong internet connection.

How does the service user know if they have a good internet connection?

The service user can do an online search for 'speed test'. If the service user's connection is 'very slow' for example, the MS Teams call quality may still be fine, but certain features e.g. breakout rooms, or video quality may be compromised. Directly connecting to their modem (via connection cable) may improve poor connections.

Will an invitee be able to see the organiser's email address and each other's email addresses in the meeting invitation?

Yes, invitees to an MS Teams meeting will be able to see both the organiser's and each other's email addresses

Is there a workaround so that service users will not see the organiser's email address in the invitation?

No. Note: MS Teams invitations cannot be sent from generic email addresses e.g. 'CHO17@hse.ie' or 'wellbeing@hse.ie'. For IT security reasons, they, apart from in exceptional cases, must issue from an identifiable person e.g. jane.bloggs@hse.ie

Is there a workaround so that service users will not see each other's email addresses?

Yes. Create the meeting invitation (*see below*).

- Do not send the MS Team invitation but copy the invitation meeting link into an email along with a cover note.
- You can then enter the service user's email in the bcc bar in your email; this means that they will not see each other's addresses.
- **Note:** *The organiser must send any proposed presenters a 'proper' MS Teams invitation to ensure they can present in the meeting- see more about presenter v organiser roles [here](#)*

Ensure:

- You copy the correct meeting link!
- You confirm the time and date in the email, as unlike a ‘normal’ Teams invitation, it will not automatically be populated
- The attendee knows that this invitation will not automatically appear in their calendar, if they use one.

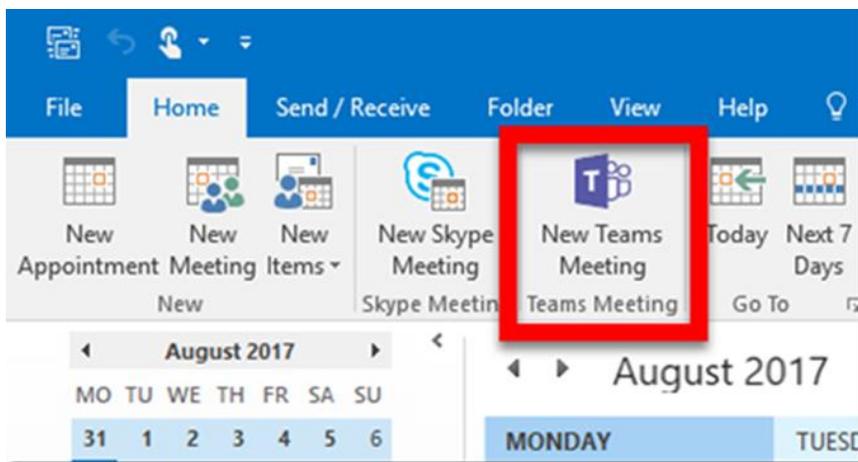
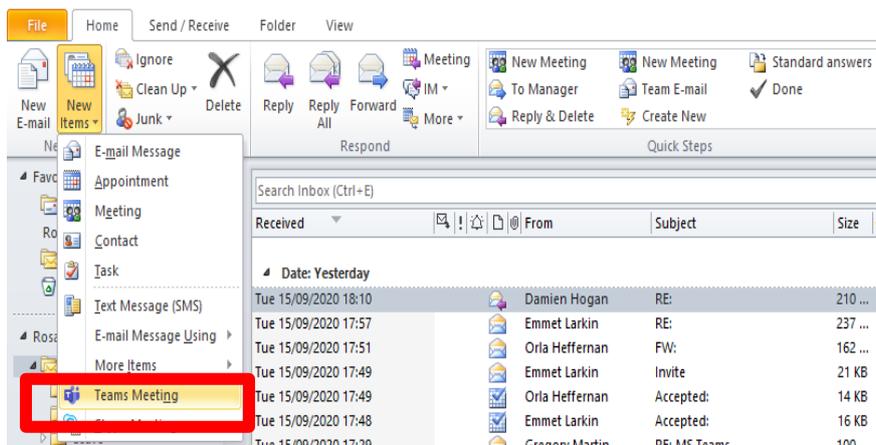
Will service users be able to see each other’s names in the meeting itself?

Yes. When you are ready to send out your meeting invitation or email, include the following text:

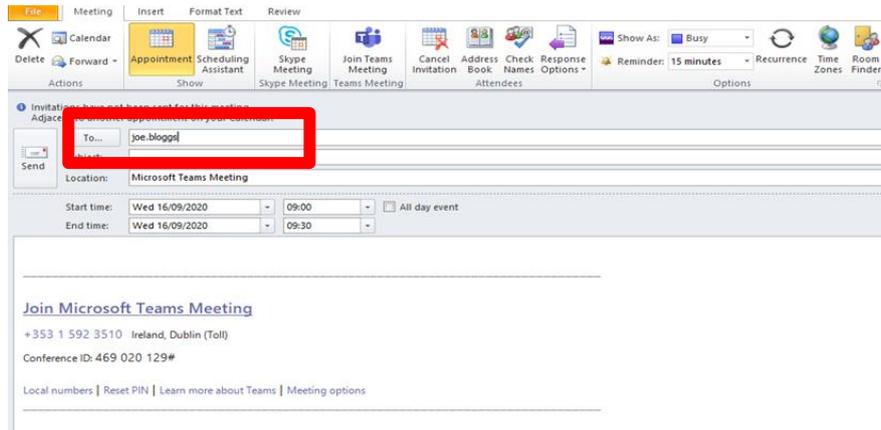
Please note that by accepting this meeting invitation, you are deemed to have consented, as defined under GDPR regulations to email contact, and to sharing your name and email address for purposes of meeting participation only.

How do I schedule a meeting?

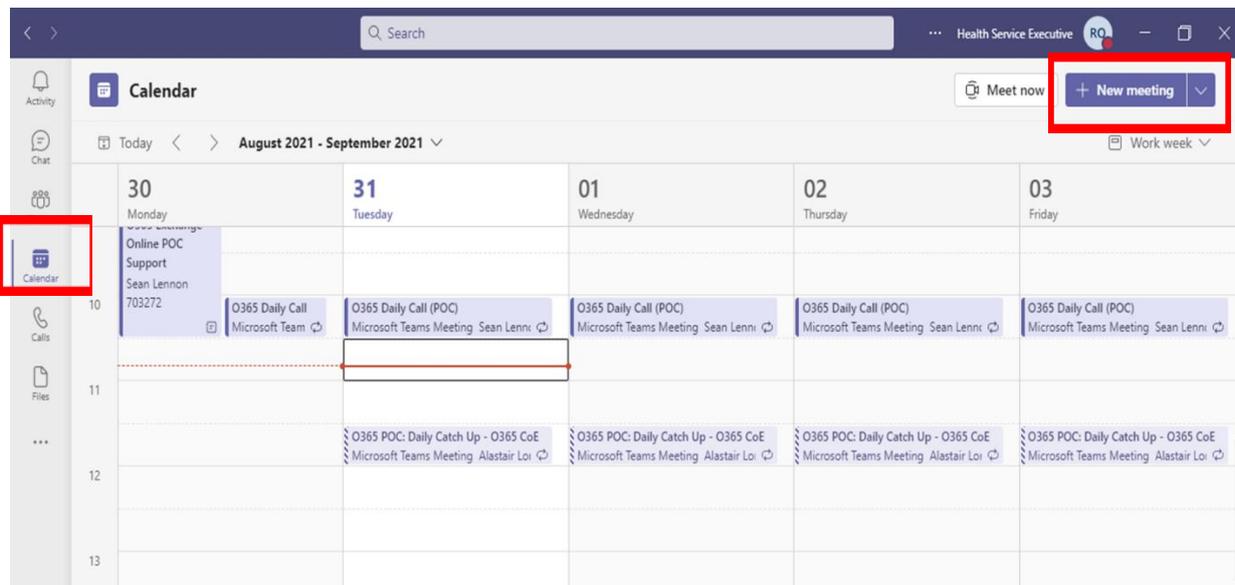
(a) Go to your Outlook and click on ‘New Items’. Choose ‘New Teams Meeting’



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



You can also schedule a meeting directly from Teams via the calendar.

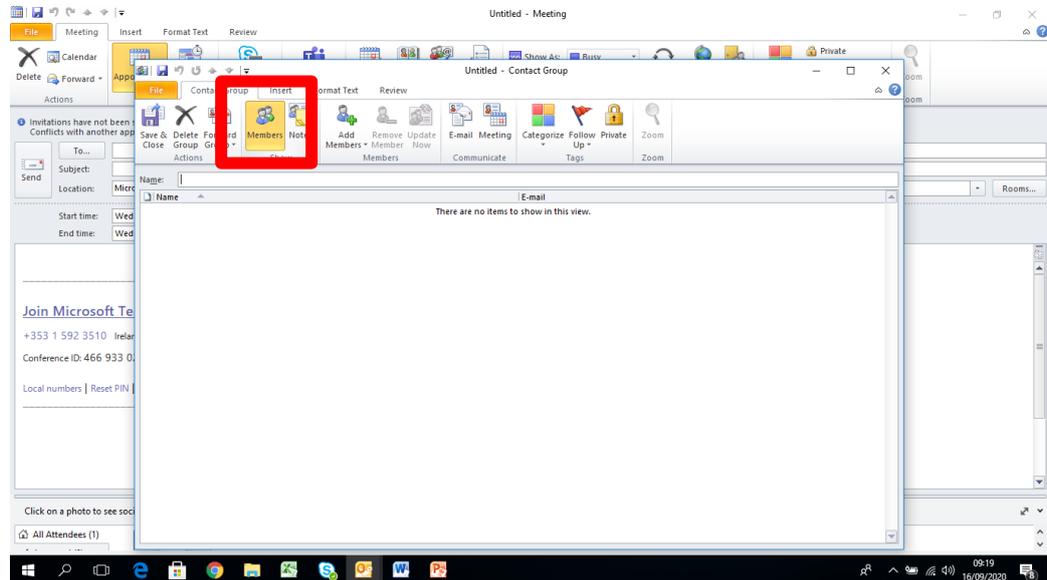


I meet the same group every week. Do I have to type in all the email addresses every time?

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.

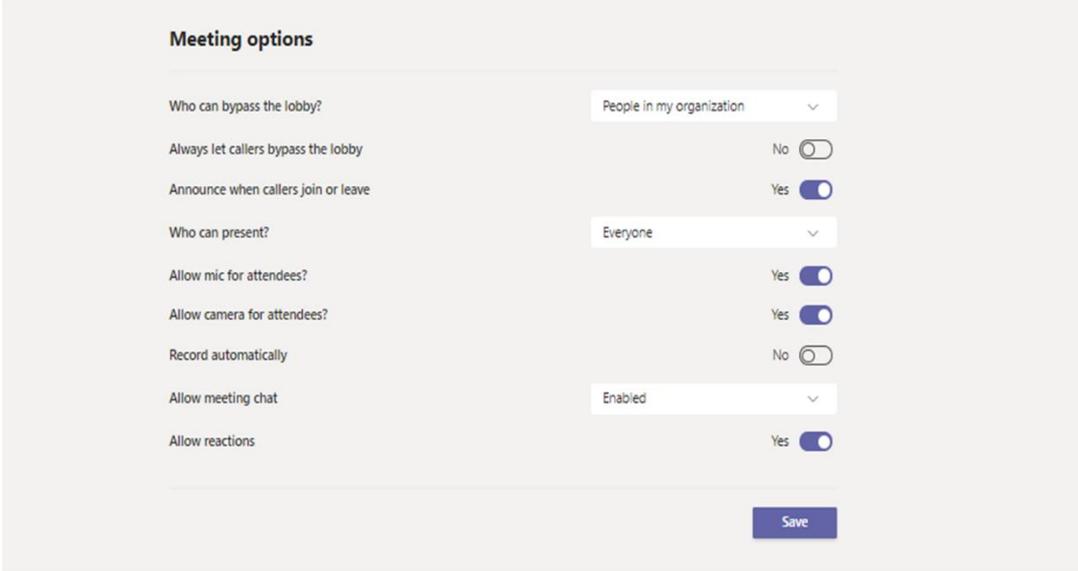
Before you send the invitation/email, bear in mind the following data privacy tips:

- Double-check all invitees' email addresses and ensure that only those who need to be in the meeting are invited.
- Know who you are interacting with; each meeting link is a 'meeting room key' – share meeting links with caution i.e. to known and/or trusted contacts only.
- Discourage service users from sharing links for e.g. with each other.
- Avoid creating recurring meetings; set each meeting up separately even if it is on every week at the same time. Having more than one meeting link reduces 'oversharing' risk e.g. the chat from a previous meeting reappearing in a subsequent meeting. You can also use the Meeting Options to select 'In Meeting Only' chat -see below
- Never share a HSE meeting link in a public setting, such as on social media or online bulletin boards, in blog posts or news articles, or on email lists with wide distribution.
- Never record meetings with service users
- For more on MS Teams data protection see [here](#)

Running a Service User meeting

Meeting Options

Configure meeting options appropriately for every meeting. Note; you cannot 'keep' the settings- you must re-configure them for each meeting.

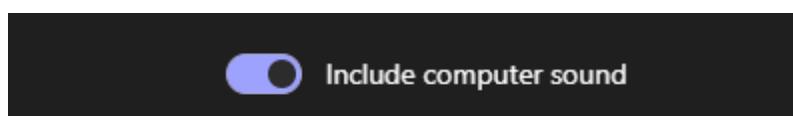


The screenshot shows the 'Meeting options' panel in Microsoft Teams. It contains the following settings:

- Who can bypass the lobby?: People in my organization (dropdown)
- Always let callers bypass the lobby: No (toggle)
- Announce when callers join or leave: Yes (toggle)
- Who can present?: Everyone (dropdown)
- Allow mic for attendees?: Yes (toggle)
- Allow camera for attendees?: Yes (toggle)
- Record automatically: No (toggle)
- Allow meeting chat: Enabled (dropdown)
- Allow reactions: Yes (toggle)

A 'Save' button is located at the bottom right of the panel.

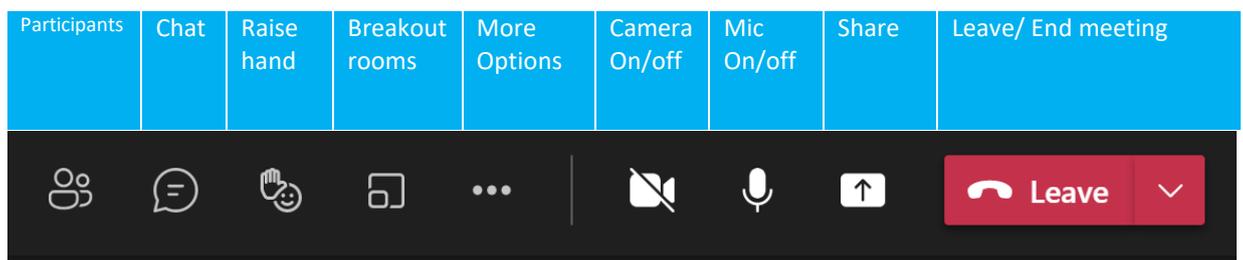
- **Presenter options;** the default option is 'everyone' can present. Change settings as required e.g. that only the organiser/named presenters can present.
 - **Chat;** consider disabling the 'Chat' in Meeting Options if concerned about potentially inappropriate or sensitive data being shared.
As above, you can also choose 'In meeting only' Chat; chat cannot then continue after the meeting in the Teams space.
 - **Lobby;** service users must wait to be admitted to a meeting if the lobby is enabled.
- If you are running a large/critical meeting, send a copy of your presentation to a trusted colleague who will also attend the meeting and designate this person as a 'presenter'.
 - Encourage a culture of 'cameras on' for smaller meetings where possible - this enables better communication where participants are comfortable to do so.
 - When sharing content, zoom in (Ctrl +). This helps your attendees see what you're showing, which will usually appear smaller on their end.
 - If you are presenting a video, 'include computer sound' in the sharing tray after you click the 'share' icon- this will ensure that the audience can hear the video.



- The Organiser can choose 'Gallery View', 'Large Gallery View' or 'Together Mode' (lecture theatre style) as preferred in 'More Options' in the meeting toolbar. For more information see [here](#)

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

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



- In '**Participants**' you can see who is in the meeting, and after the meeting, an Attendance list will appear in the MS Teams Chat workspace (note- this may take up to 30 minutes after the meeting to appear).
- 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 Options**' 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

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

Recording of meetings where service users are present is **not** permitted in any circumstances.

Where can I go for further assistance?

For technical assistance, please contact the **Service Desk** on 0818 300300 or log a query via the self-service portal [here](#)

For training or group rollout support with MS Teams please contact **O365.Support@hse.ie**