AllWays on Teams

Appointment Manager Quickstart Guide

June 2020

allways[sm]
HEALTH PARTNERS

A MEMBER OF PARTNERS® HEALTHCARE

Step 1

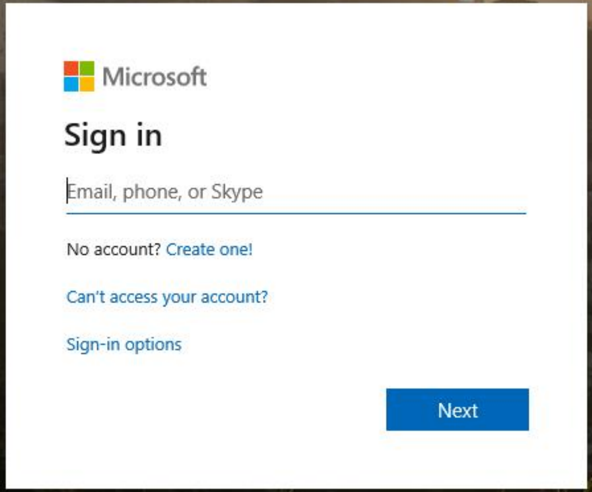
Go to http://teams.microsoft.com/.

> **NOTE:** If your practice already has a Teams license, you should open a private browser window to use this virtual visit platform in Teams. This will ensure that you are not logged into two different Teams account at once. Here are tips for opening a private window in any browser.

Step 2

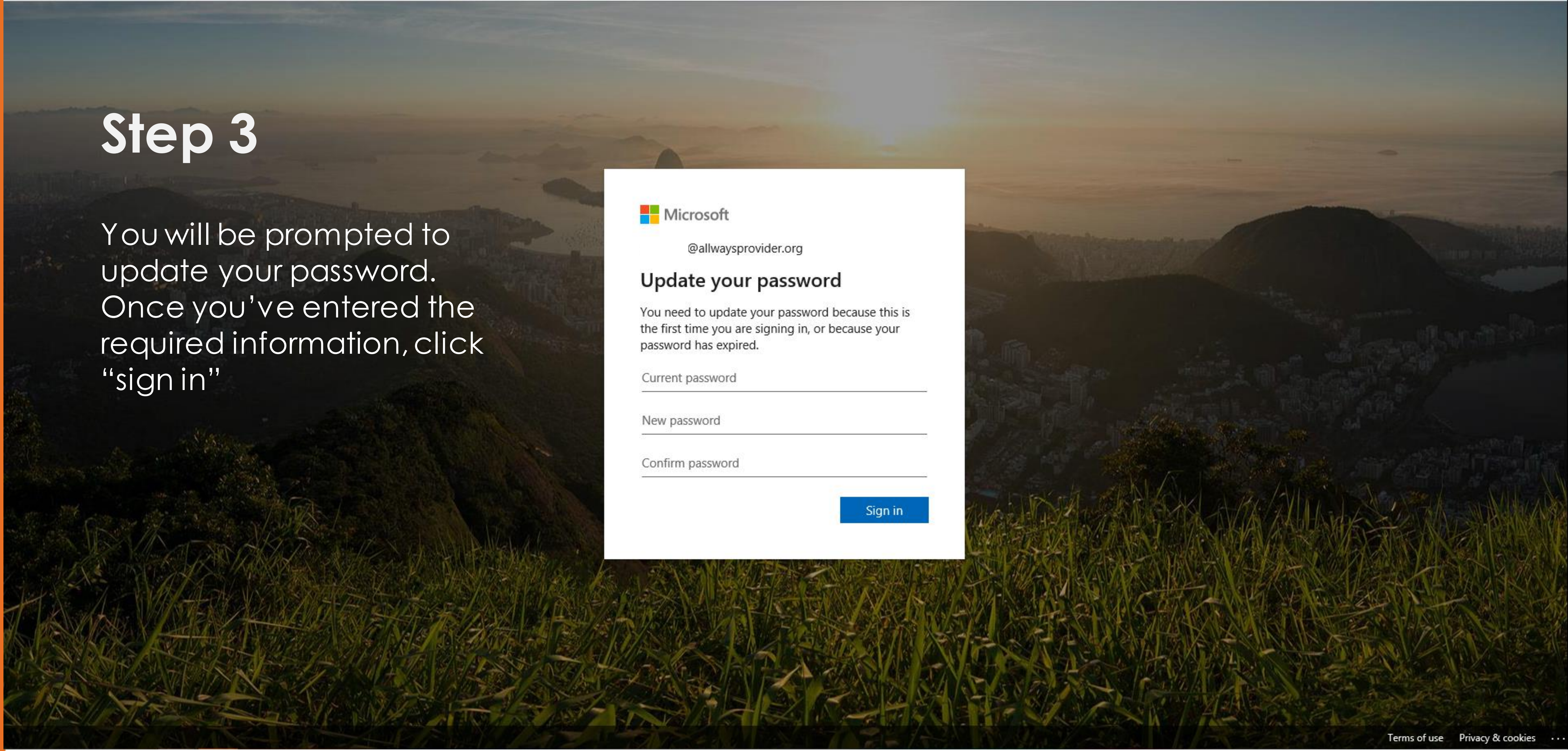
We sent your username and password in separate email. Your username is an email address.

Enter your username. Enter your temporary password. Click "next."



Step 3

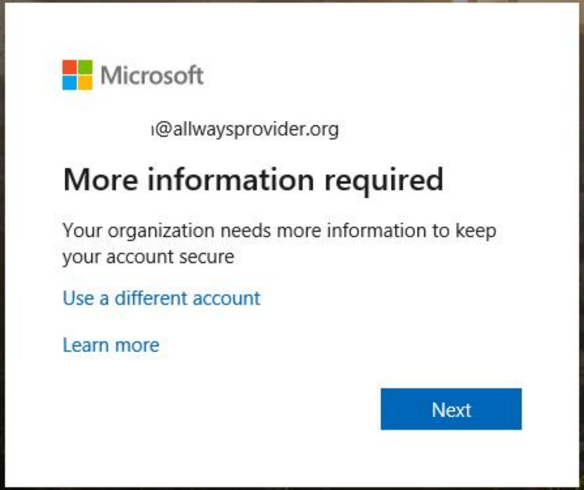
You will be prompted to update your password. Once you've entered the required information, click "sign in"



Step 4

You will need to verify your contact information before you log into the service.

Click “Next” to continue.



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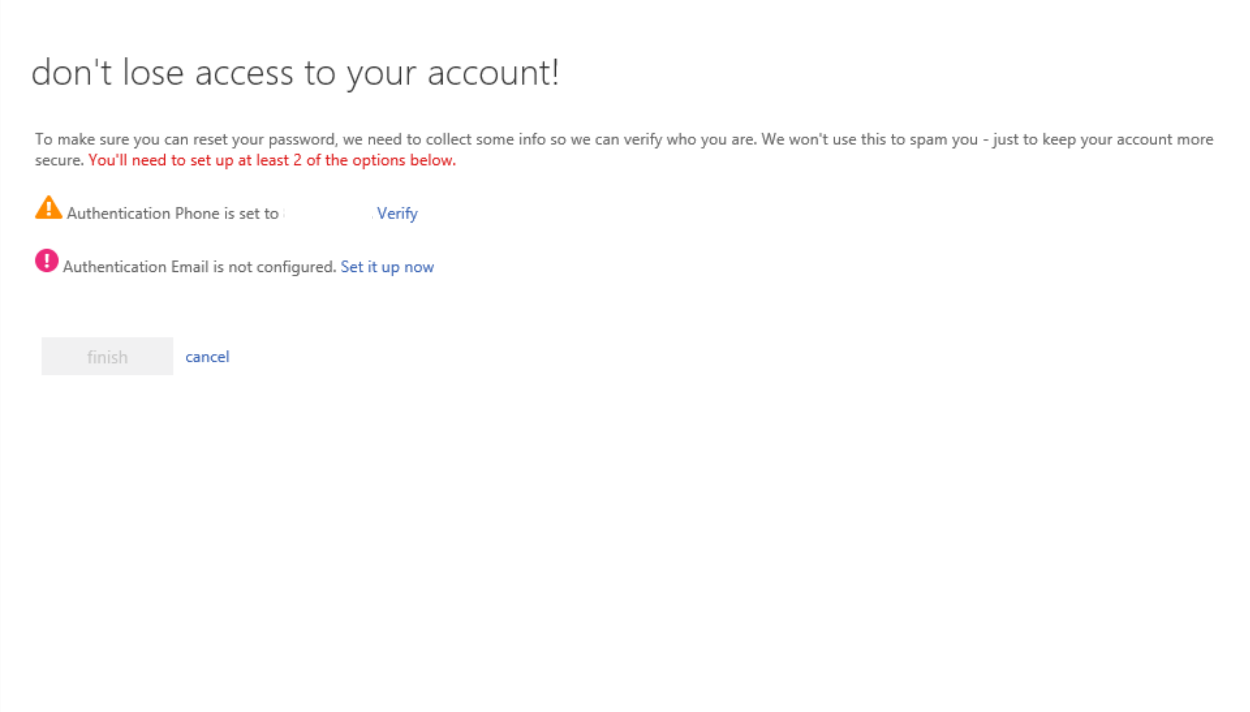
Step 5

Follow the steps to authenticate your information and set up password reset self-service options.



Step 6

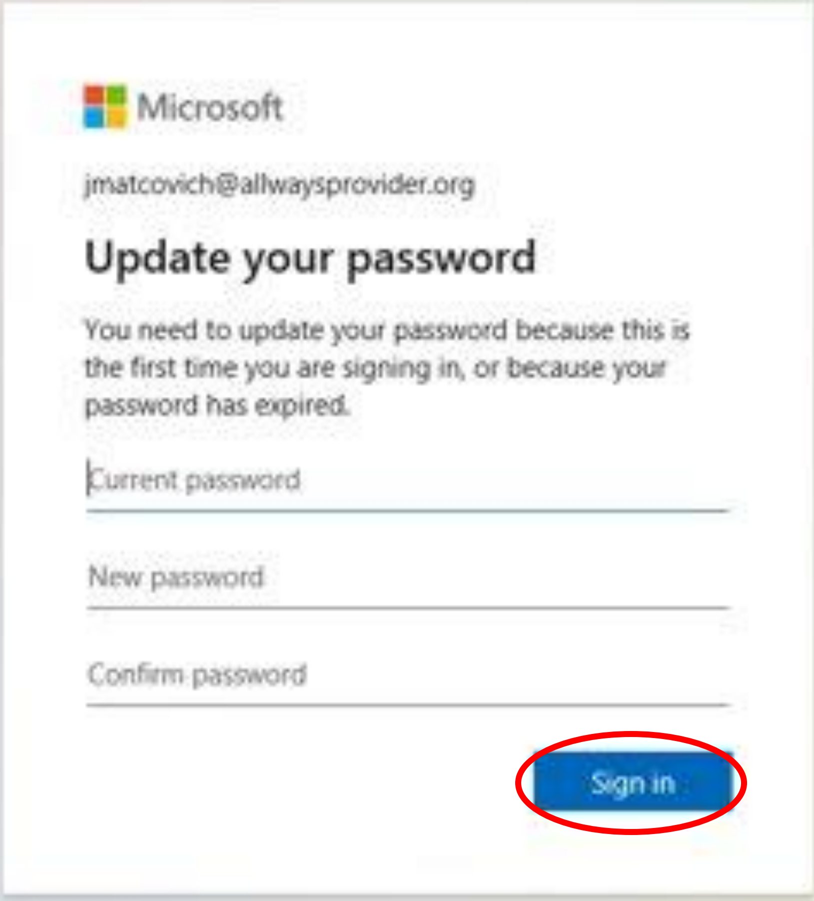
Next you will be asked if you want to stay signed in.

If you are in a private browsing window, this feature will not work.

AllWays Health Partners includes AllWays Health Partners, Inc. and AllWays Health Partners Insurance Company.

Note:

Every 90 days you will be prompted to update your password. A pop up box will appear when you log in. Follow the instructions and click "sign in."

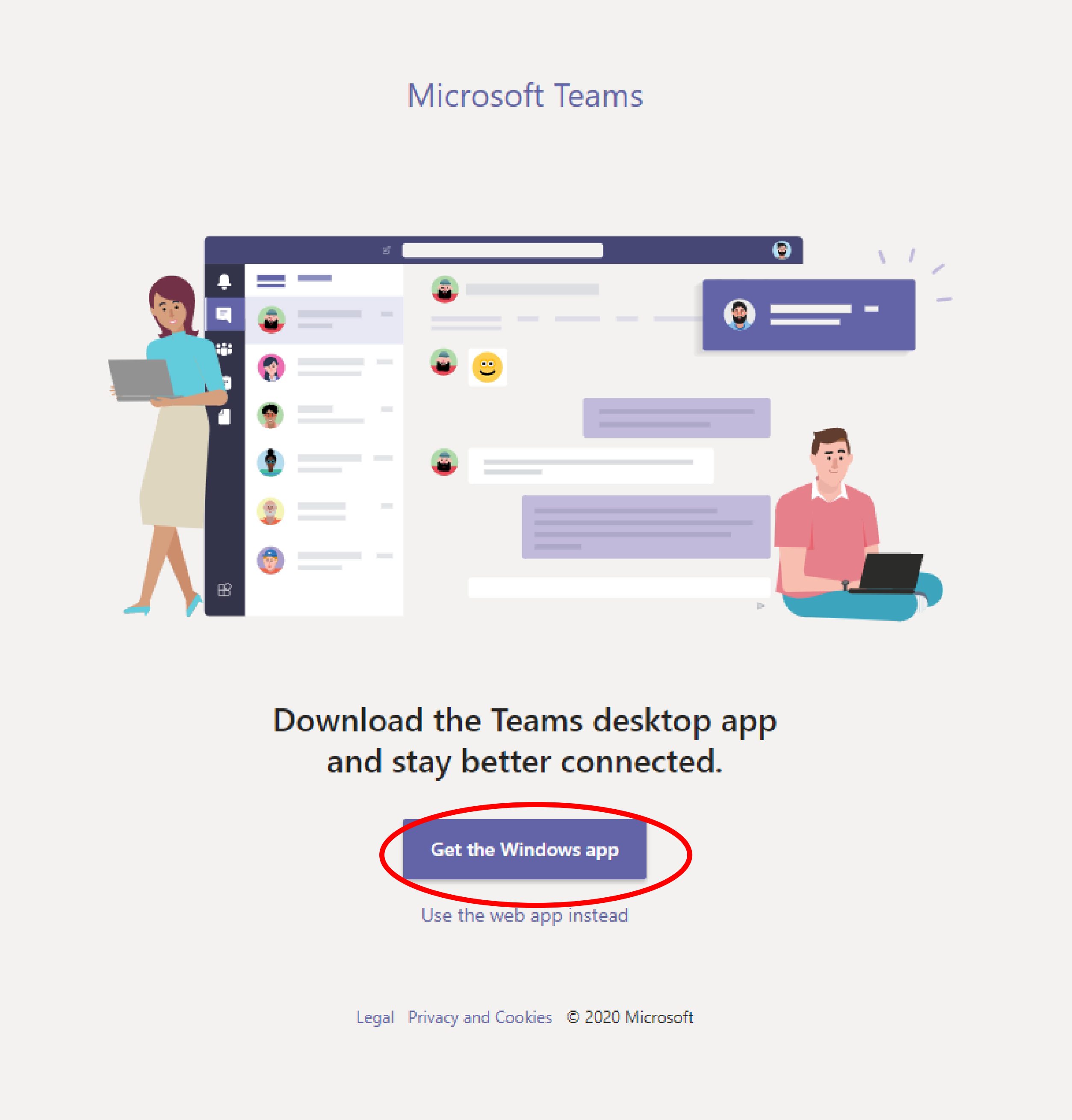


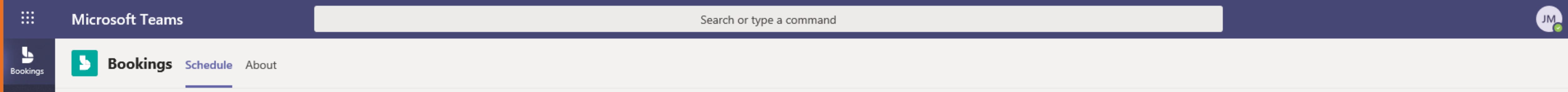
Step 7

Now you're ready to download the Teams app. This will only take a minute.

For the best experience, we recommend downloading the app to your device instead of using the web app.

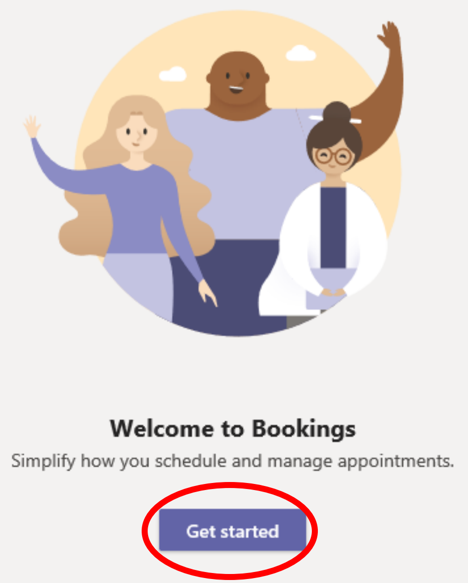
In addition, clinicians should use a tablet or a mobile phone to download the app. This will ensure they have all the necessary functionality, including a microphone and camera.





Step 8

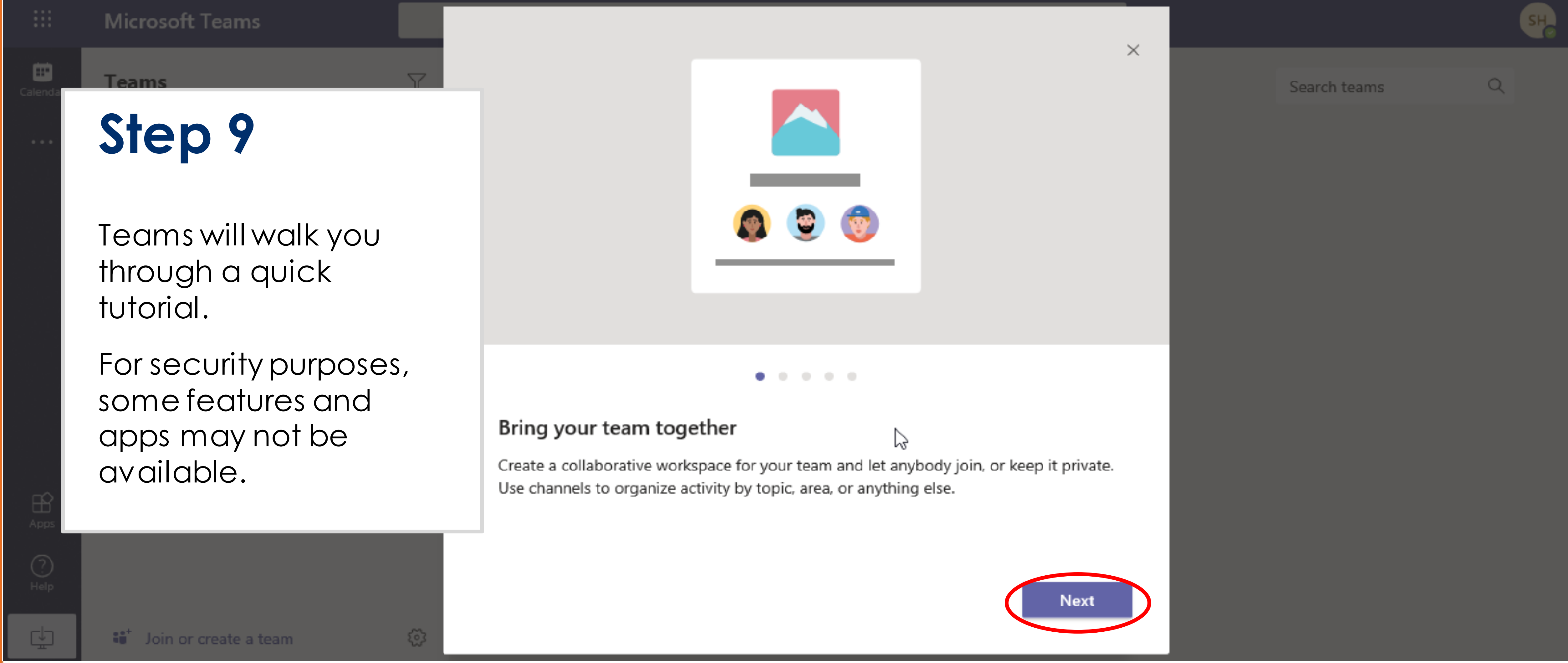
You will see this screen.
Click "get started."



Step 9

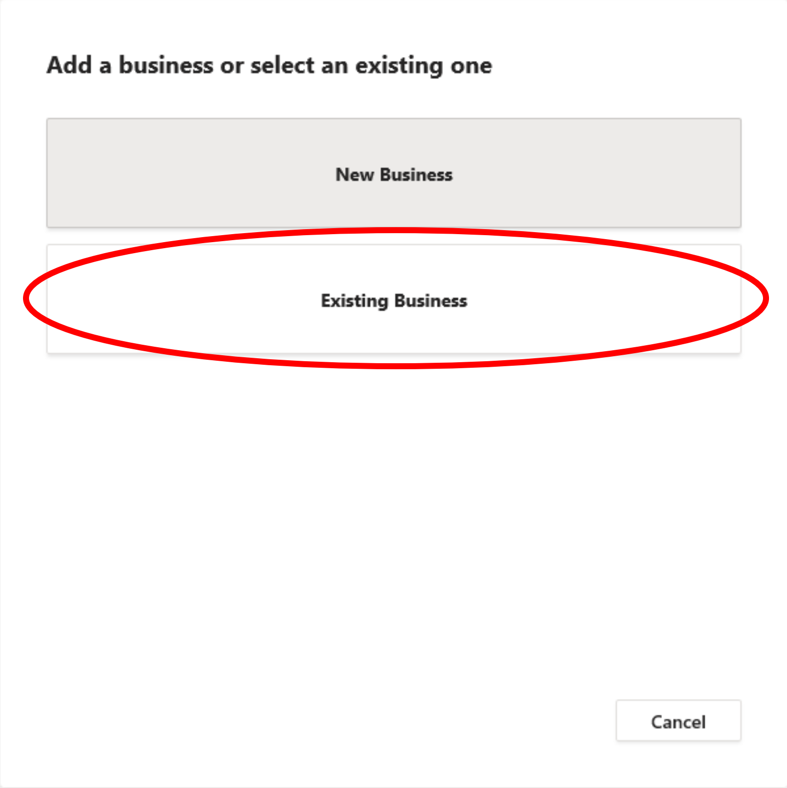
Teams will walk you through a quick tutorial.

For security purposes, some features and apps may not be available.



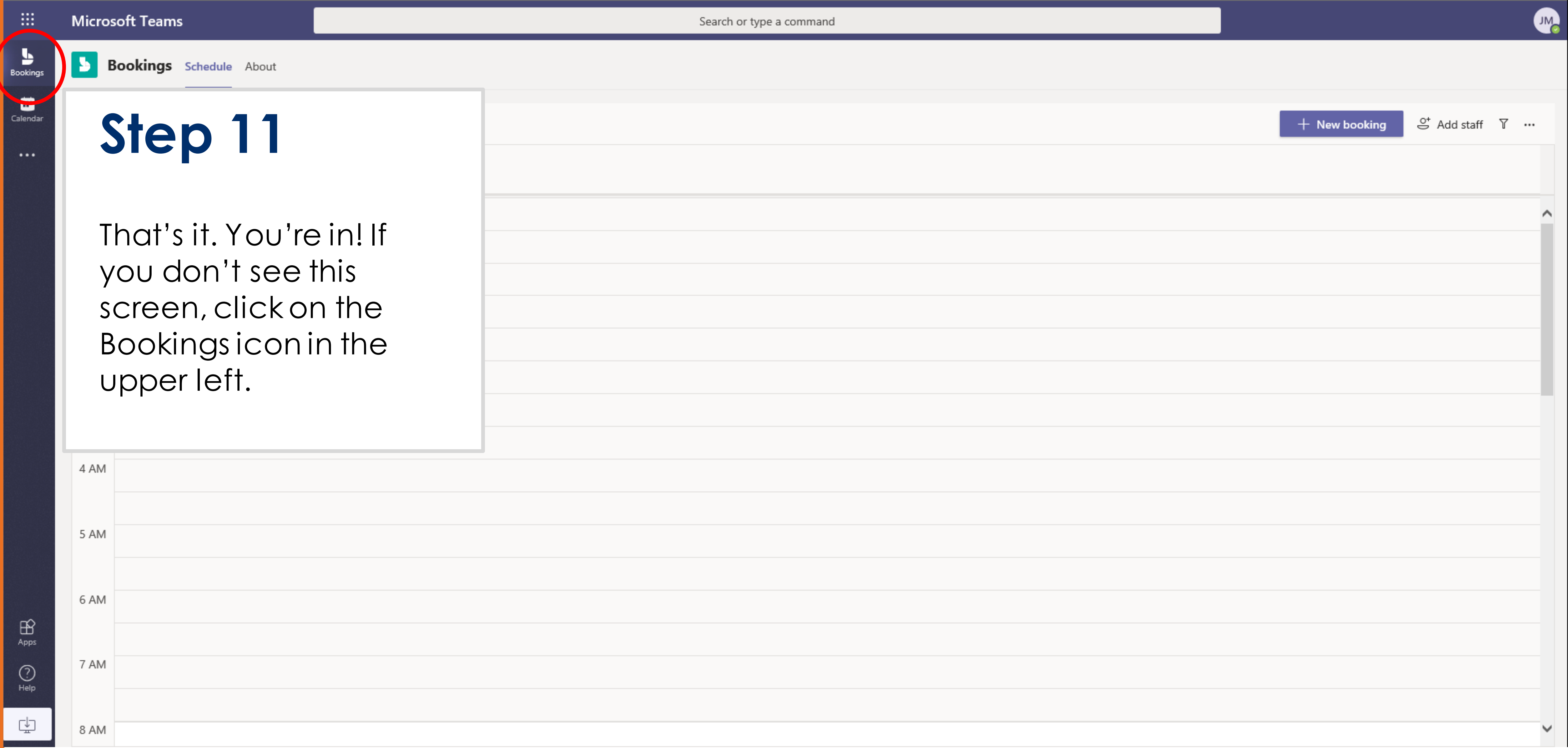
Step 10

The user administrator will have set up the business already. Join the practice by selecting "Existing Business" and searching for the practice name

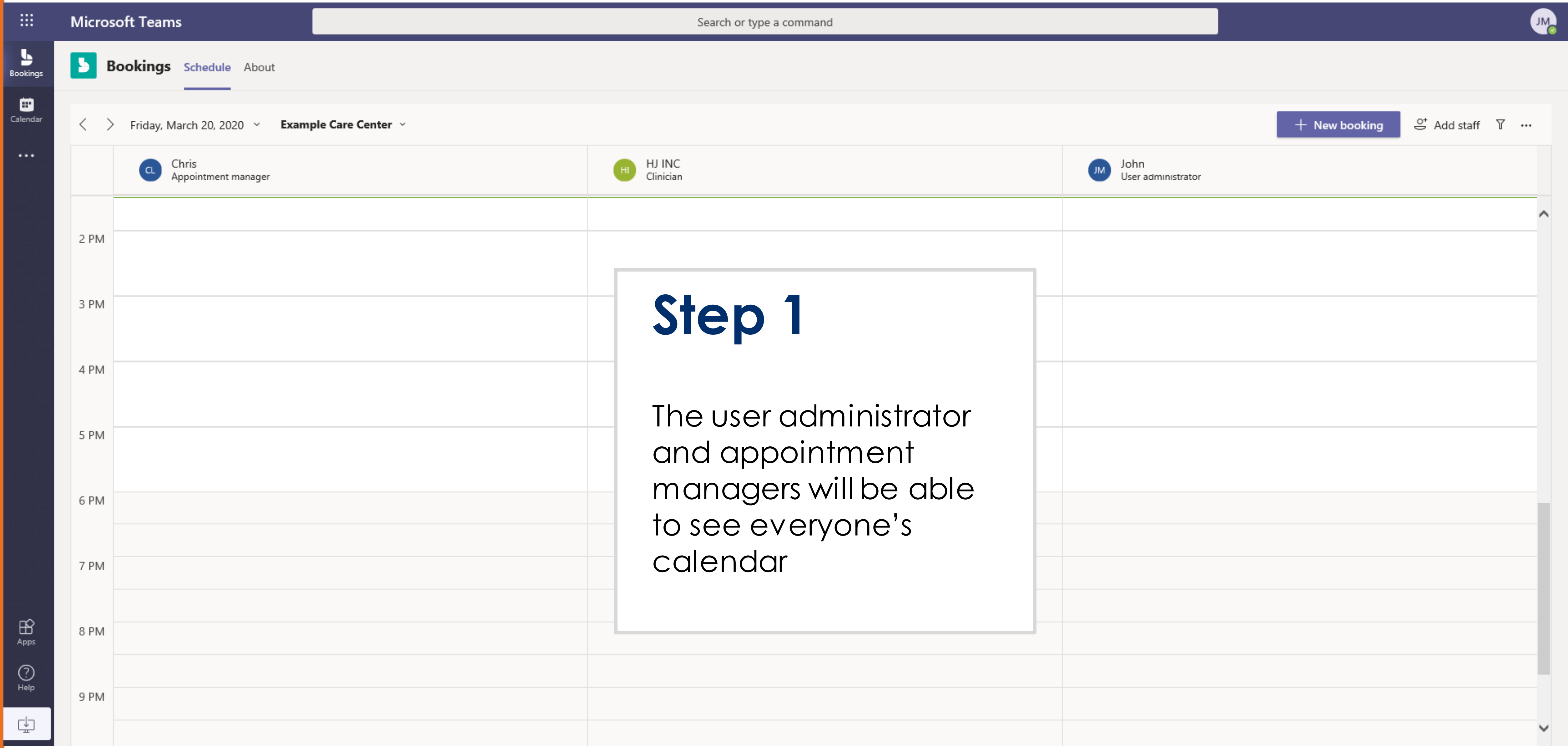


Step 11

That's it. You're in! If you don't see this screen, click on the Bookings icon in the upper left.

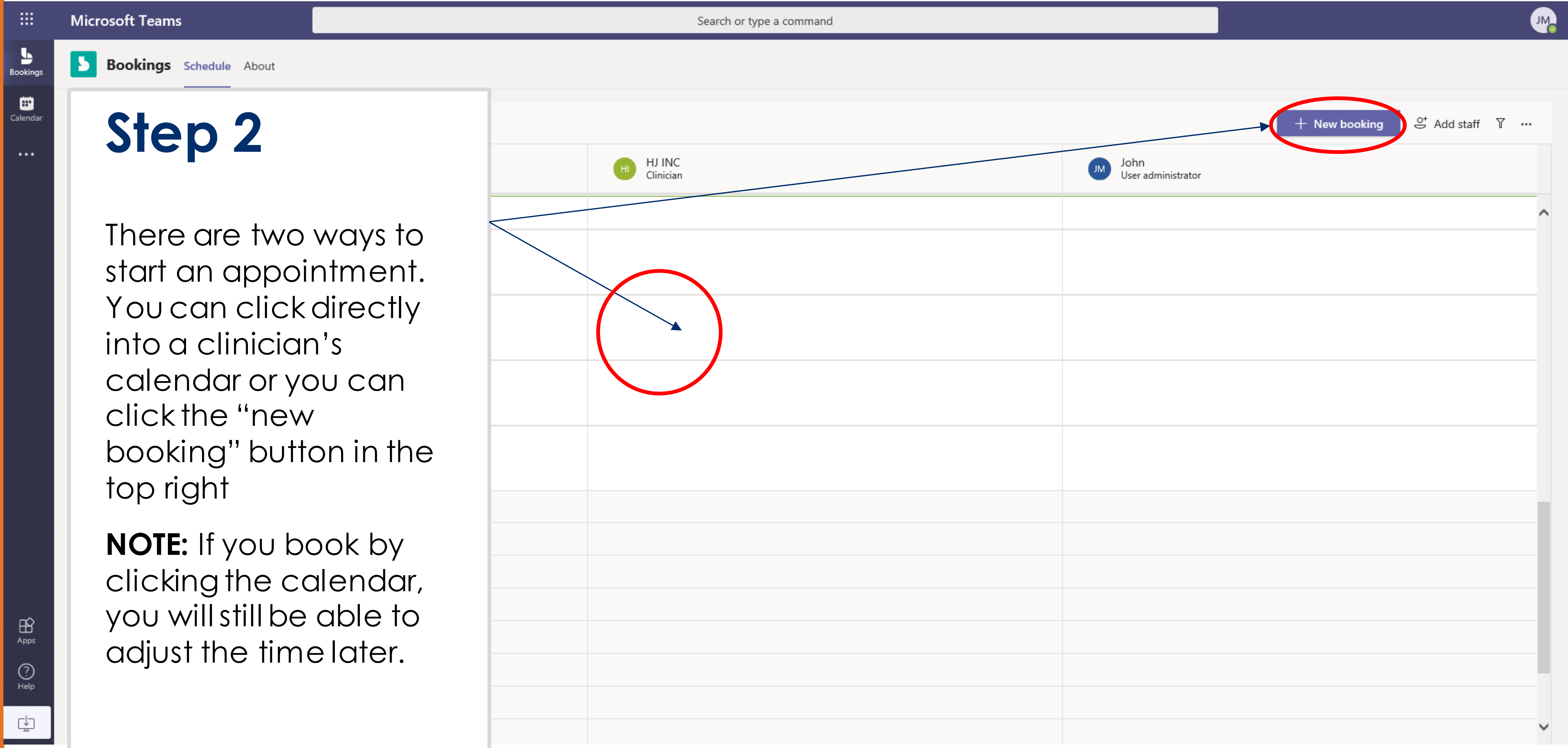


Booking an appointment



Step 1

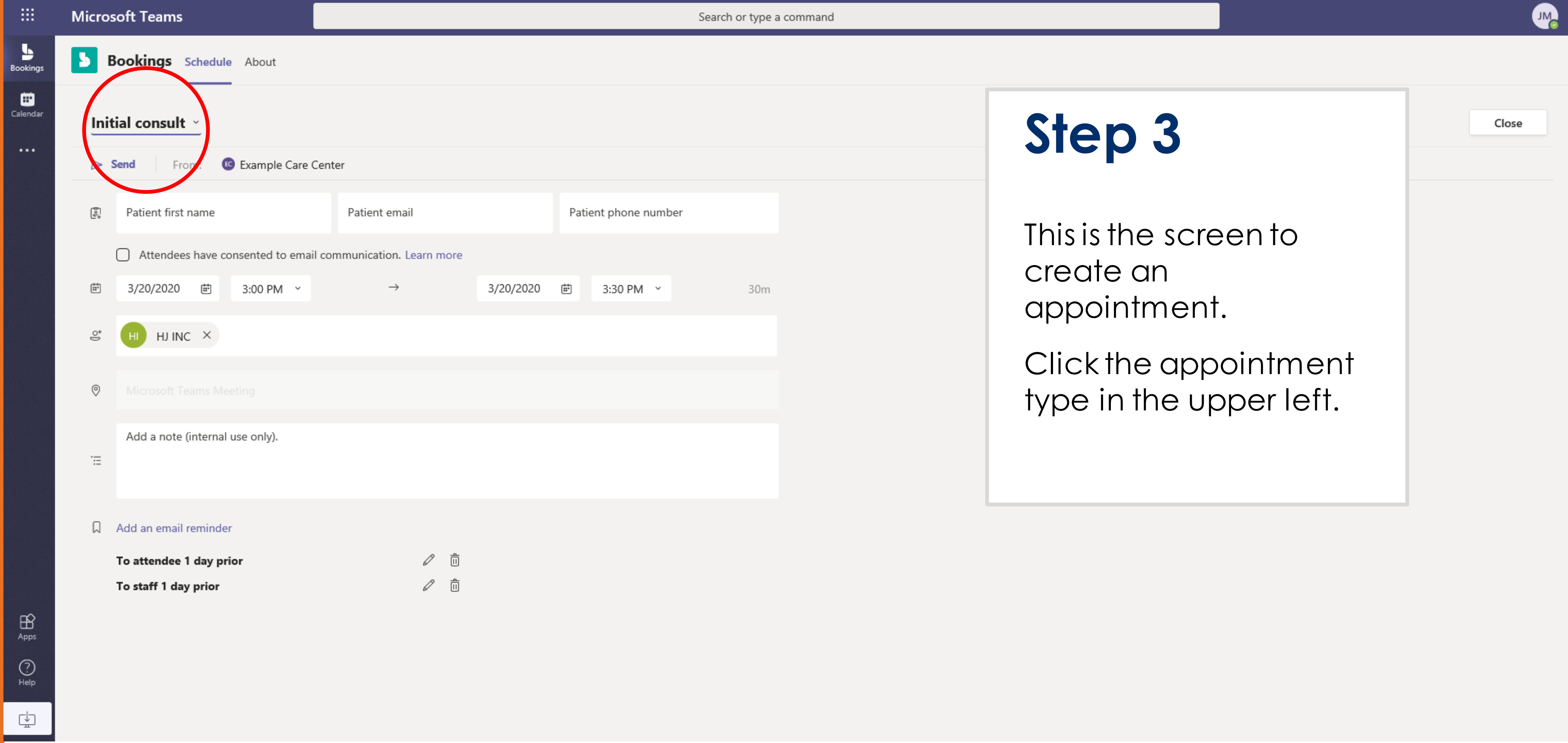
The user administrator and appointment managers will be able to see everyone's calendar



Step 2

There are two ways to start an appointment. You can click directly into a clinician's calendar or you can click the "new booking" button in the top right

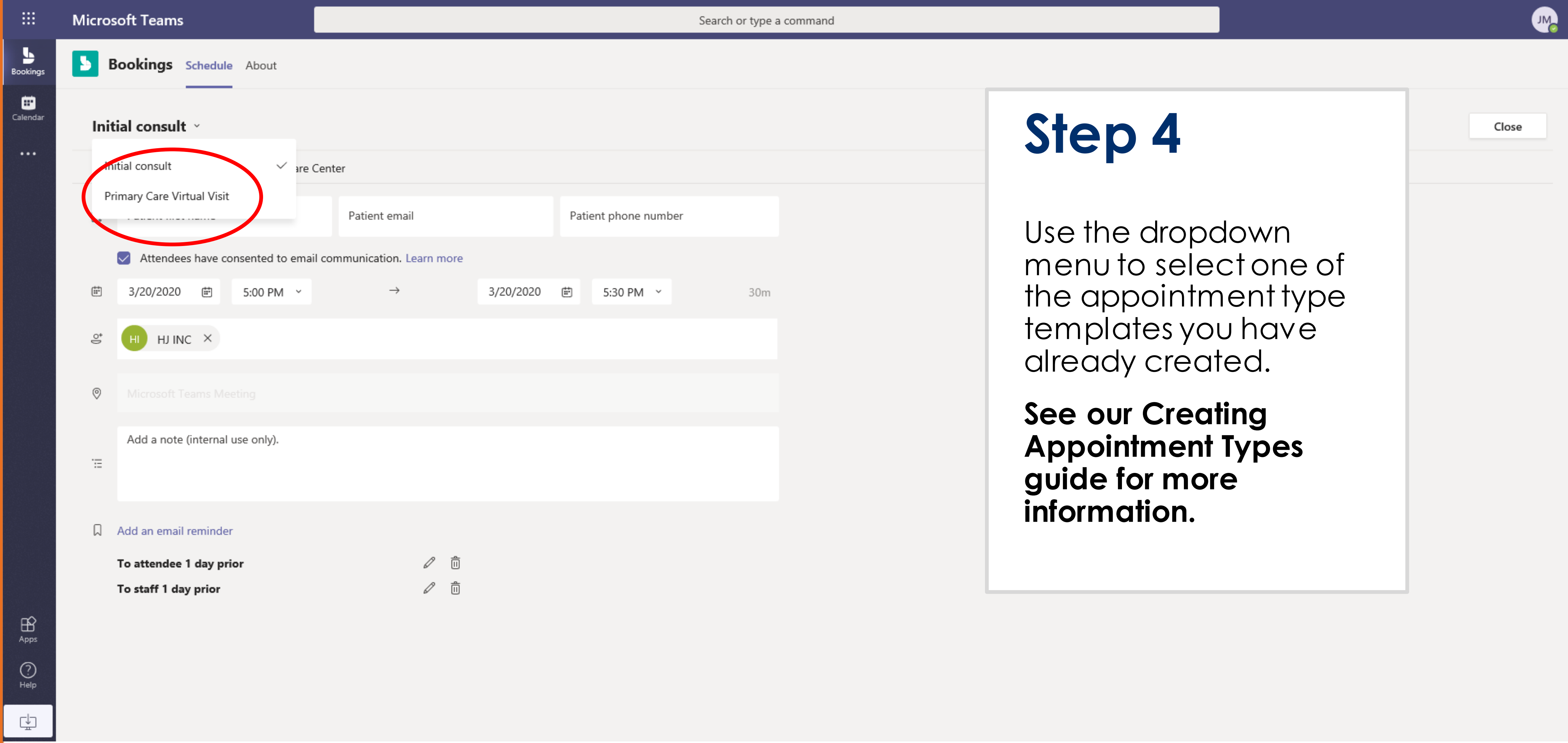
NOTE: If you book by clicking the calendar, you will still be able to adjust the time later.



Step 3

This is the screen to create an appointment.

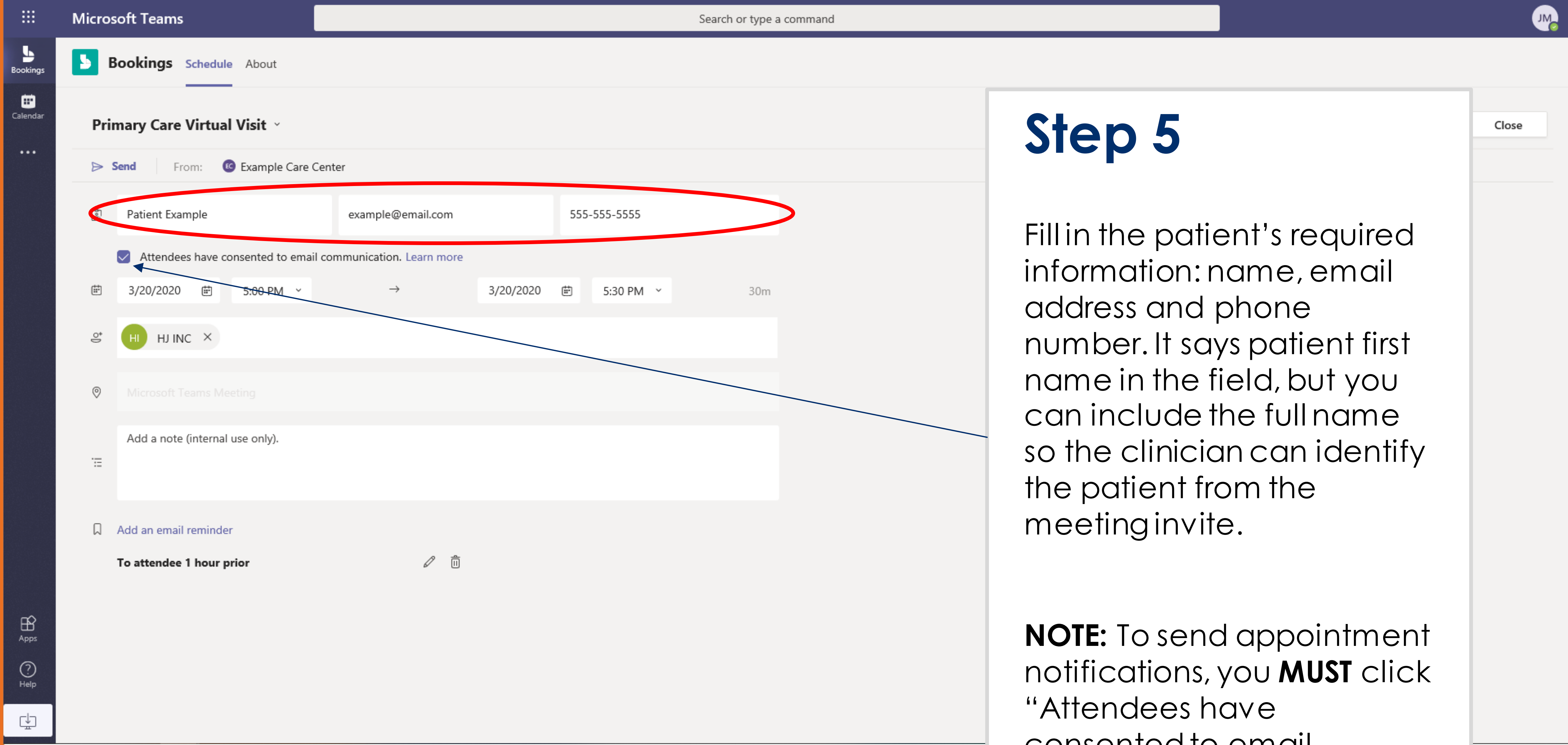
Click the appointment type in the upper left.



Step 4

Use the dropdown menu to select one of the appointment type templates you have already created.

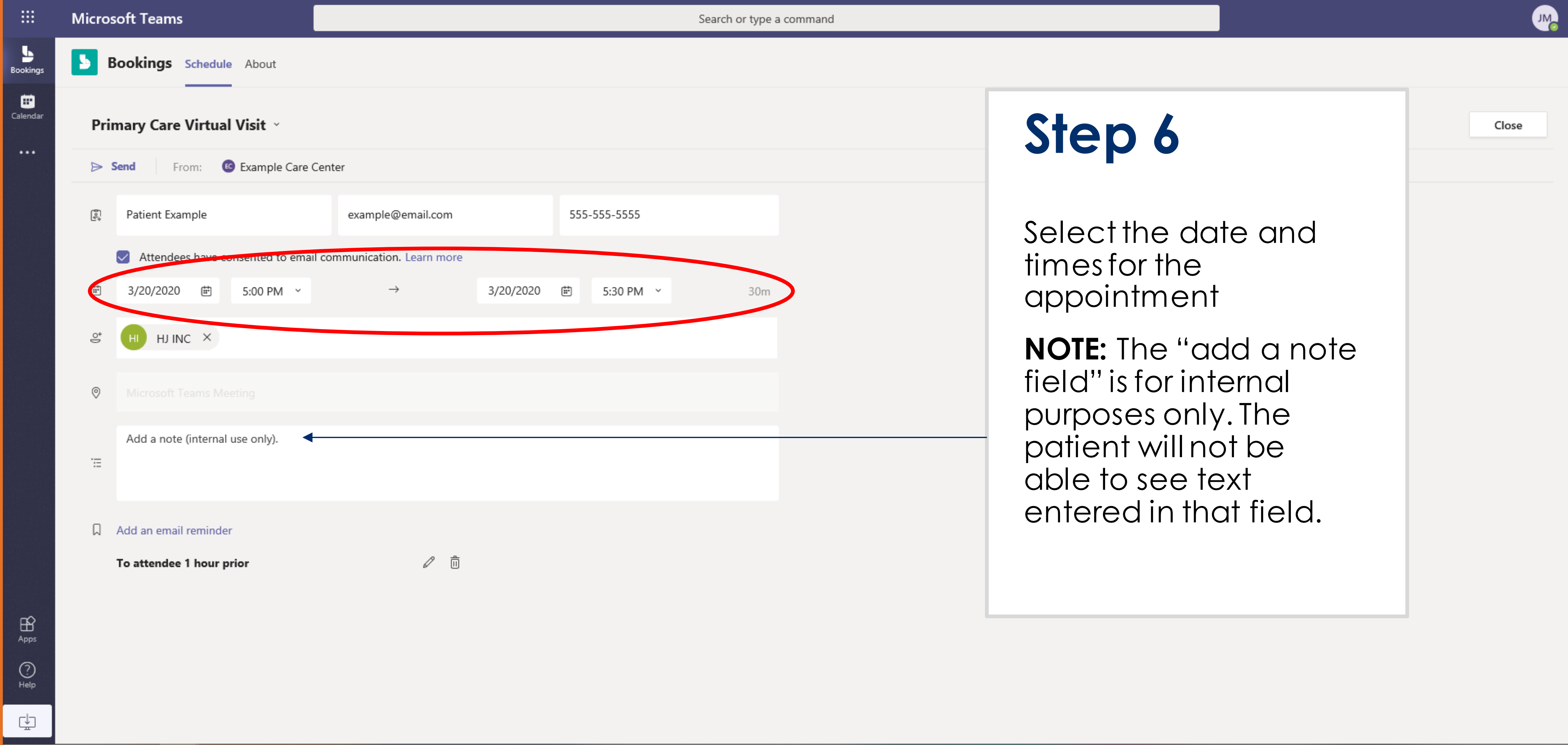
See our Creating Appointment Types guide for more information.



Step 5

Fill in the patient's required information: name, email address and phone number. It says patient first name in the field, but you can include the full name so the clinician can identify the patient from the meeting invite.

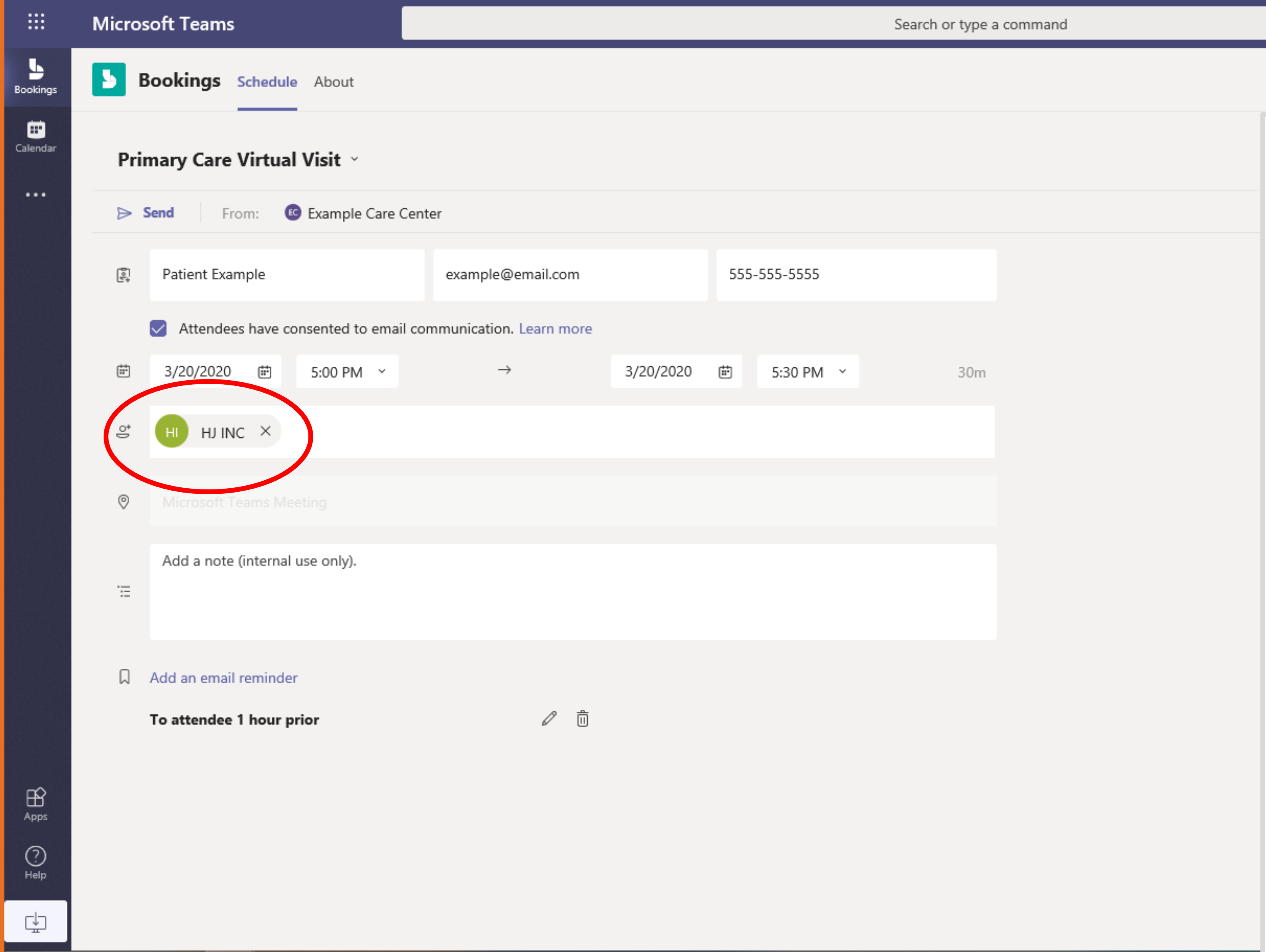
NOTE: To send appointment notifications, you **MUST** click "Attendees have consented to email communication"



Step 6

Select the date and times for the appointment

NOTE: The "add a note field" is for internal purposes only. The patient will not be able to see text entered in that field.

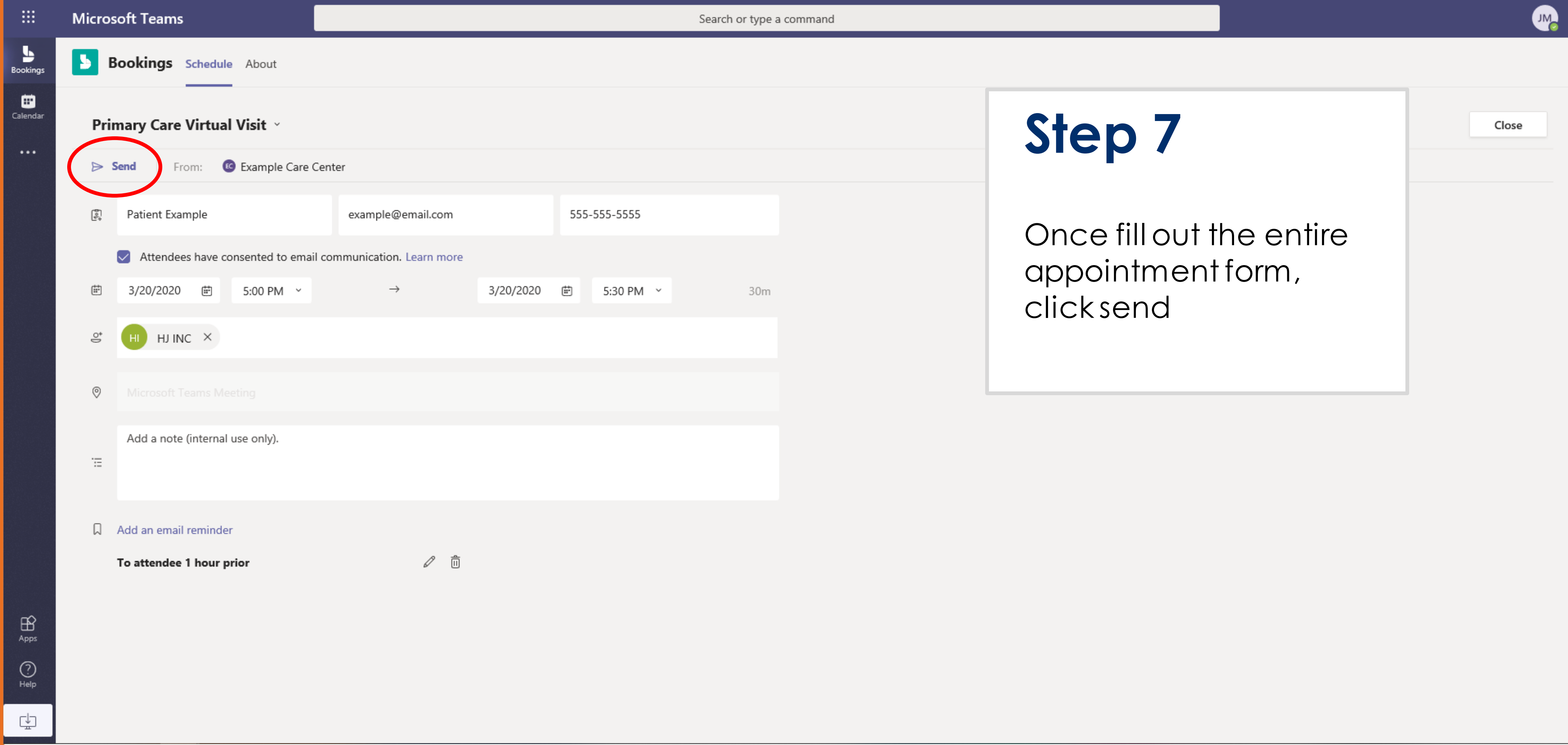


Step 7

If you started the appointment by clicking into a clinician's calendar, this field will be pre-populated.

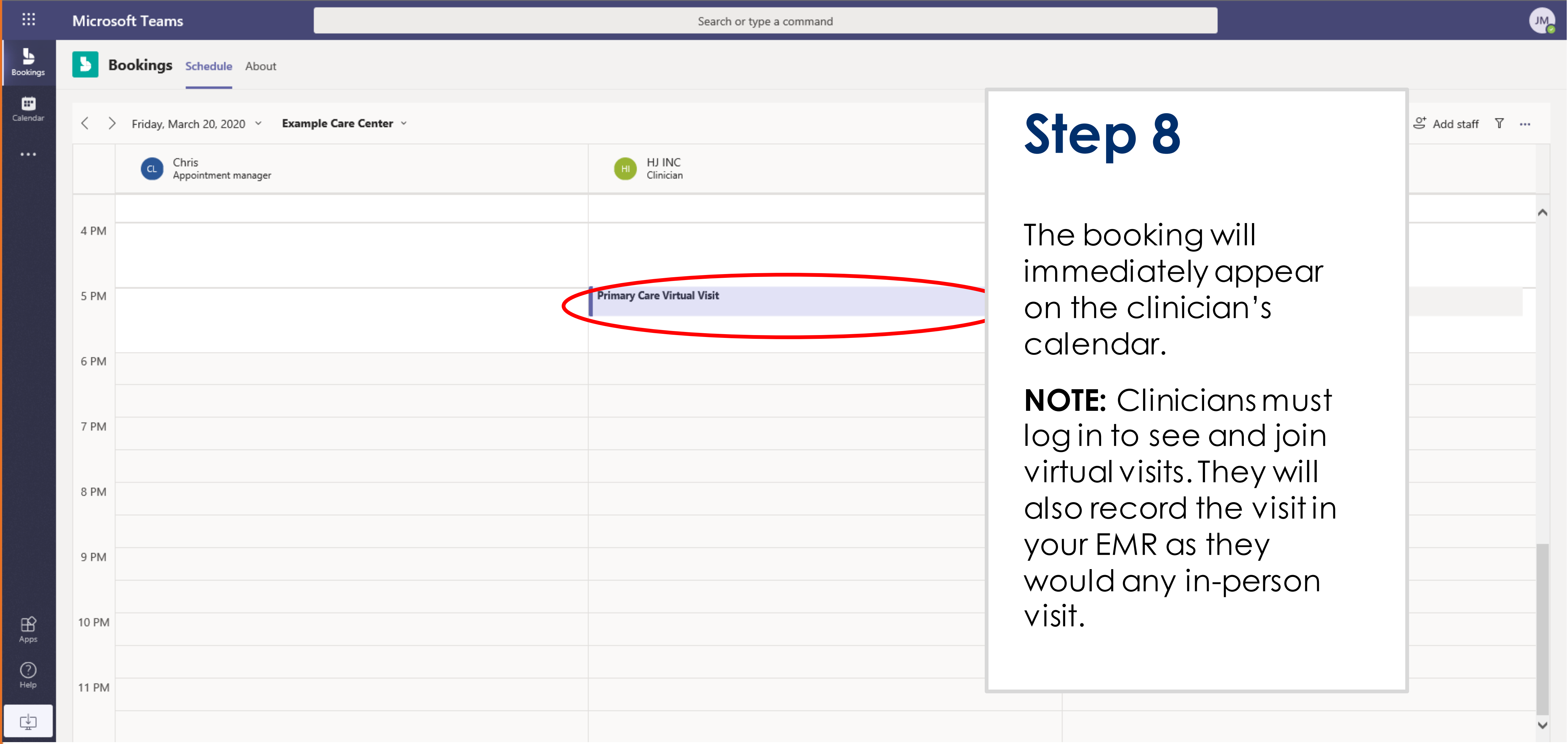
If you started by clicking "new booking," you will need to add the clinician here. Simply start typing their name to add them.

Multiple clinicians can be added to a booking in this way.



Step 7

Once fill out the entire appointment form, click send

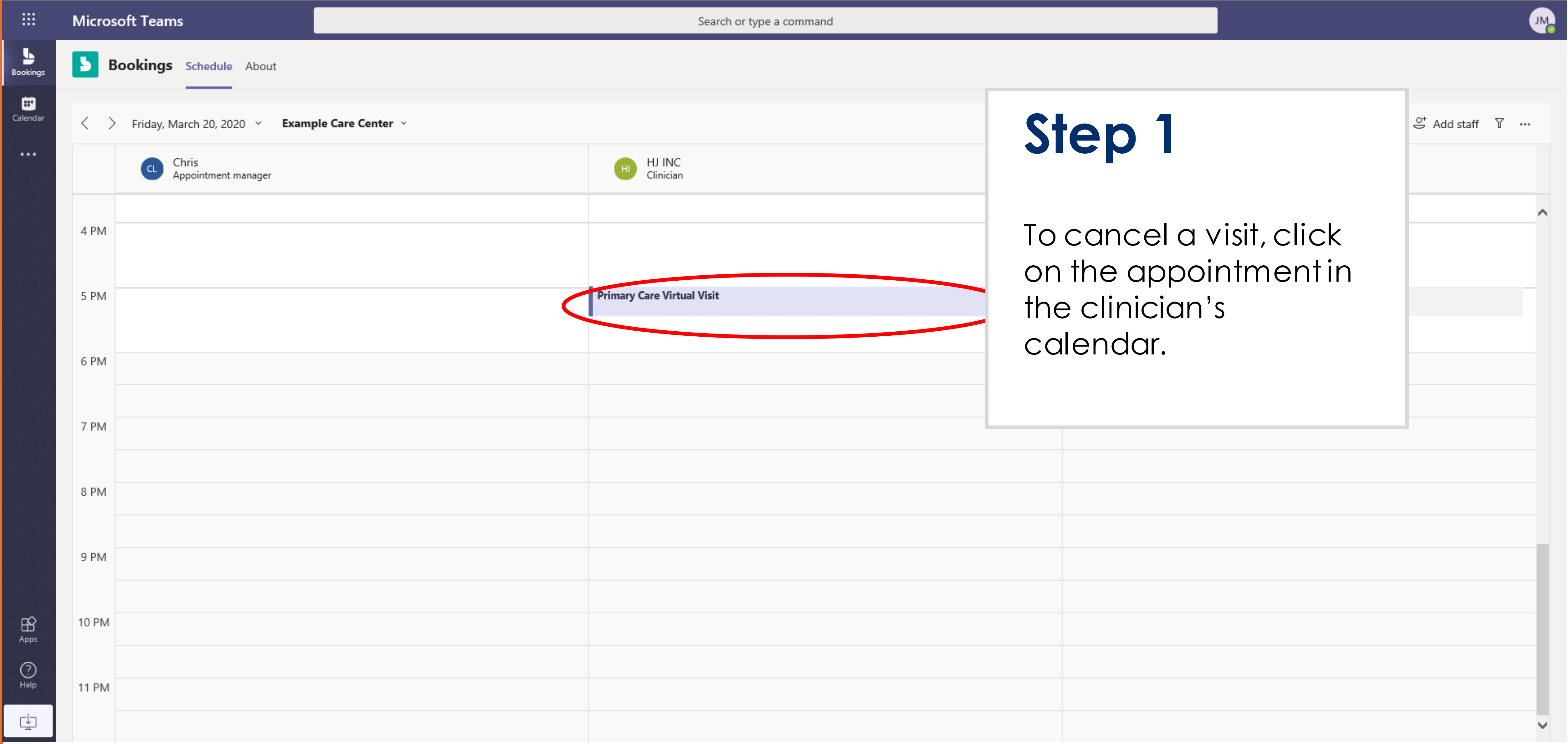


Step 8

The booking will immediately appear on the clinician's calendar.

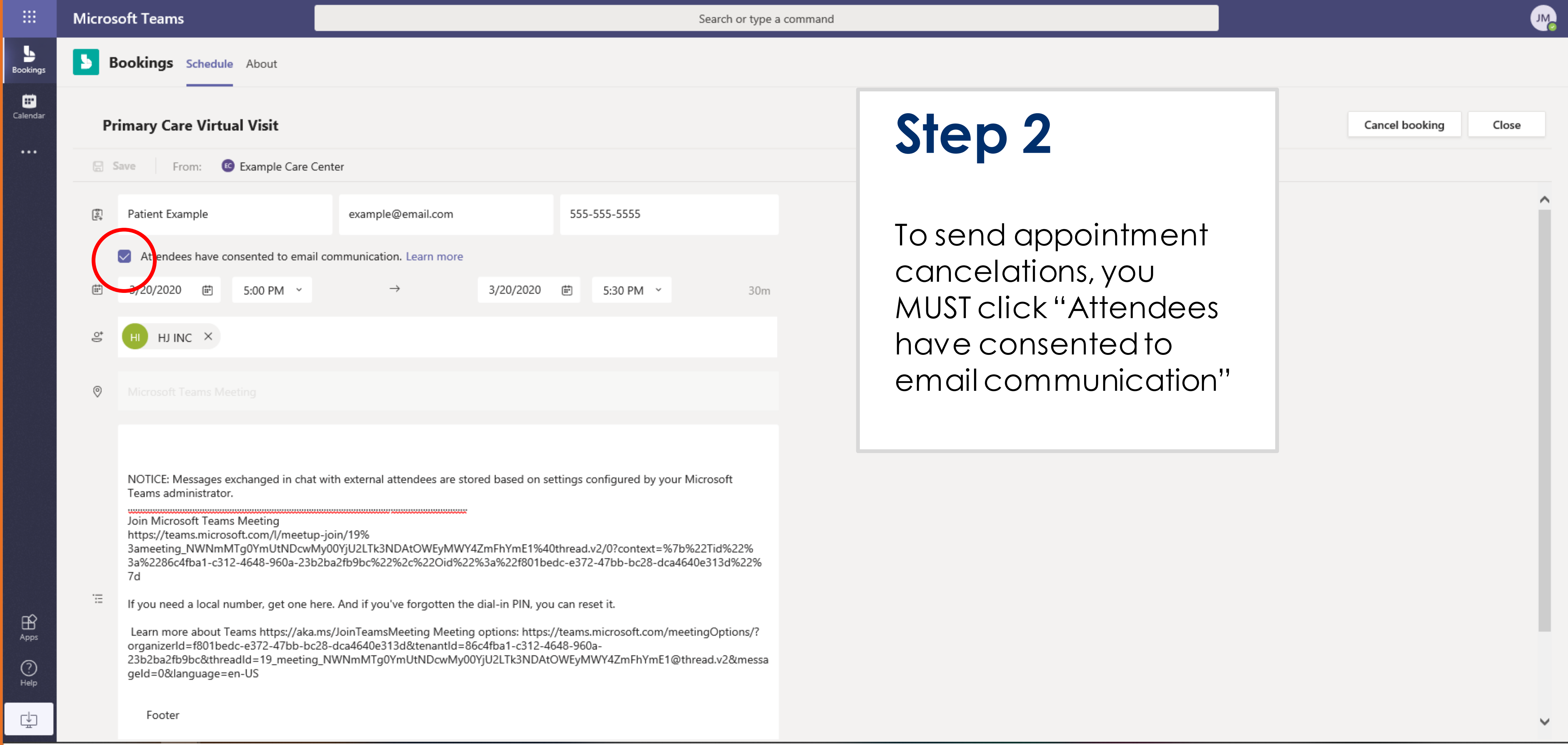
NOTE: Clinicians must log in to see and join virtual visits. They will also record the visit in your EMR as they would any in-person visit.

Cancelling an appointment



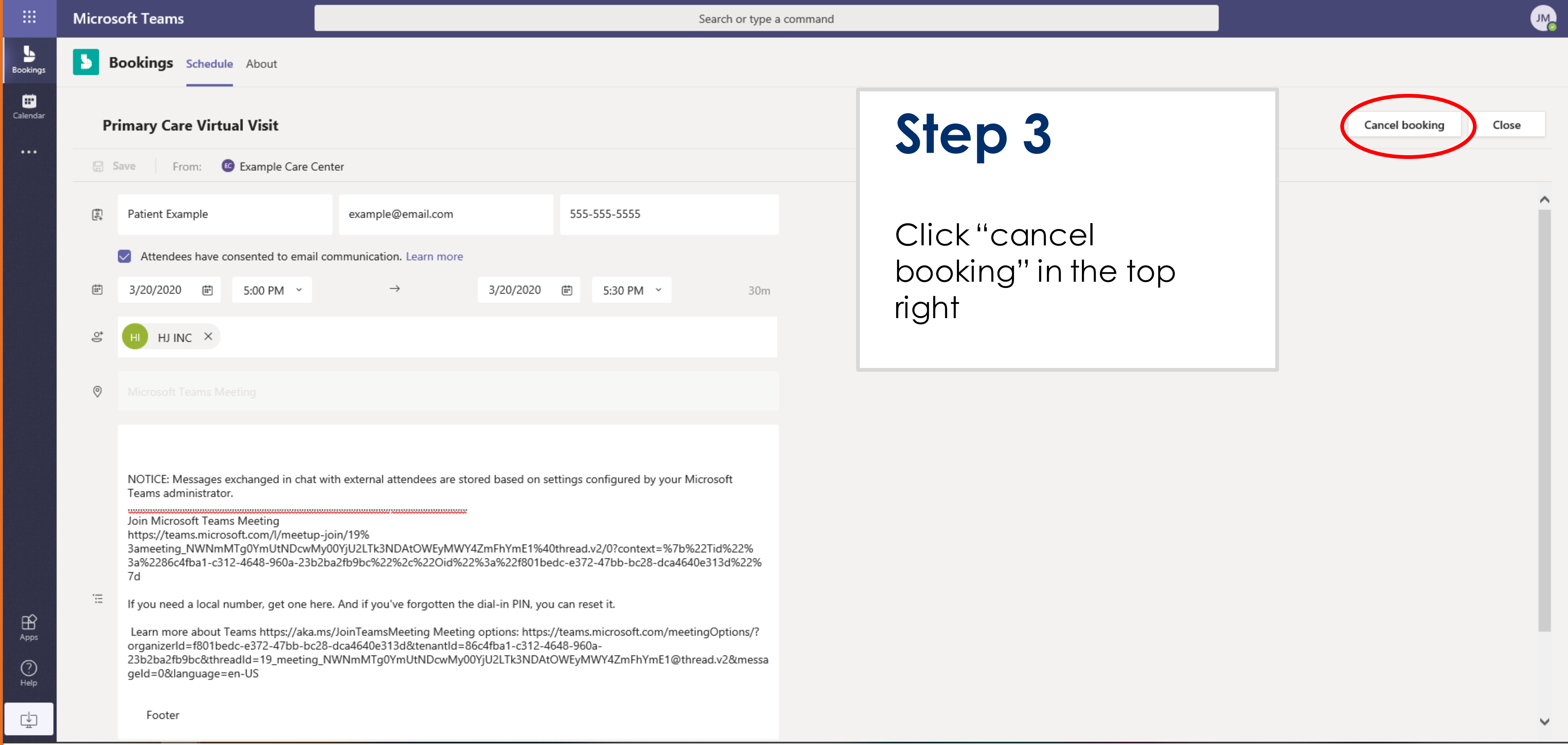
Step 1

To cancel a visit, click on the appointment in the clinician's calendar.



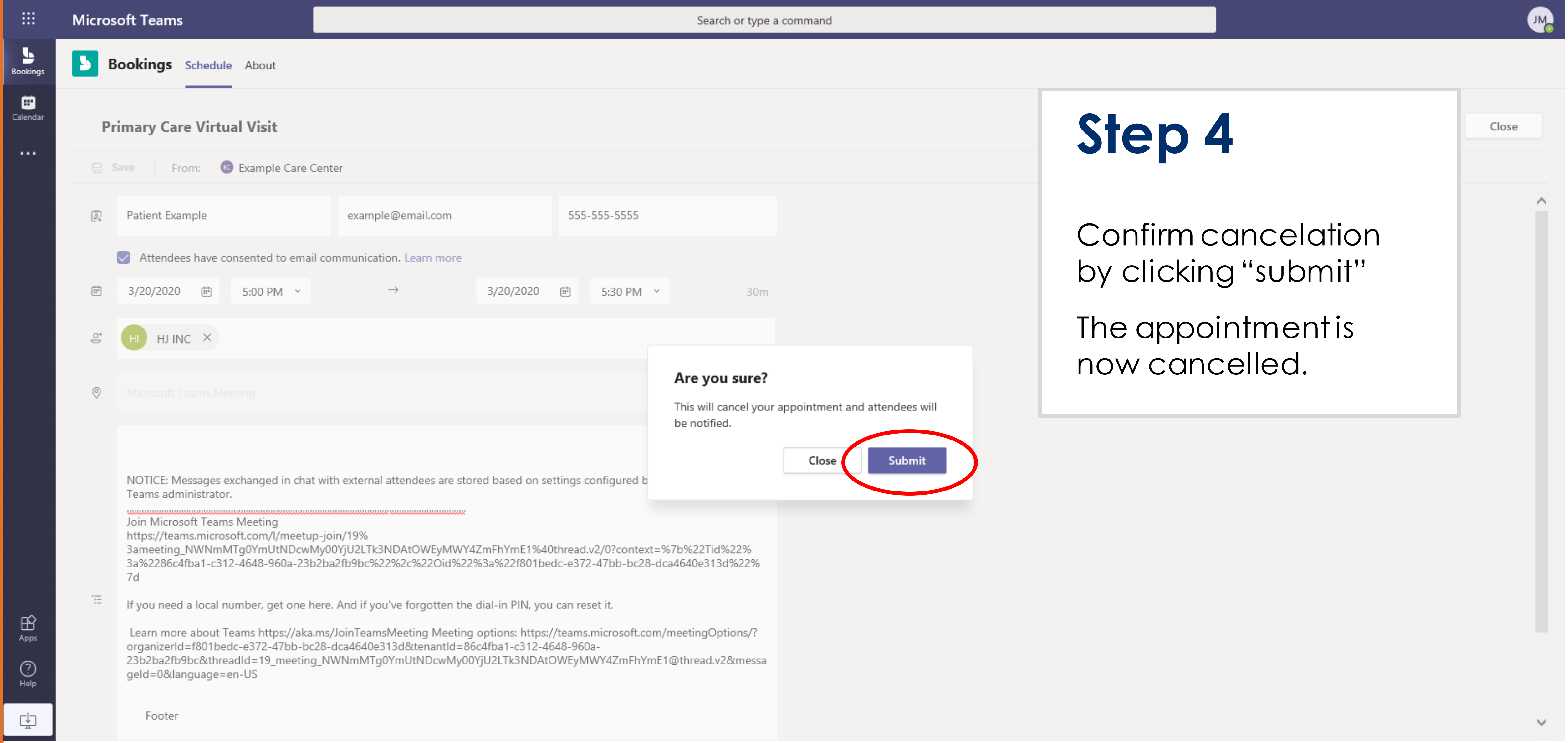
Step 2

To send appointment cancelations, you MUST click "Attendees have consented to email communication"



Step 3

Click "cancel booking" in the top right



Step 4

Confirm cancelation by clicking "submit"

The appointment is now cancelled.