

# AllWays on Teams

## Appointment Manager Quickstart Guide

June 2020



# Step 1

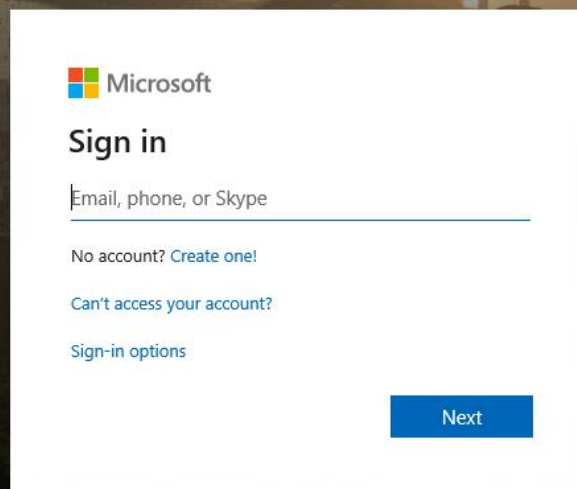
Go to <http://teams.microsoft.com/>.

**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.”

A white rectangular overlay containing the Microsoft sign-in interface. At the top left is the Microsoft logo (four colored squares) followed by the word "Microsoft". Below this is the heading "Sign in". Under the heading is a text input field with the placeholder text "Email, phone, or Skype". Below the input field are three links: "No account? Create one!", "Can't access your account?", and "Sign-in options". At the bottom right of the overlay is a blue button with the text "Next".

Microsoft

## Sign in

Email, phone, or Skype

[No account? Create one!](#)

[Can't access your account?](#)

[Sign-in options](#)

Next

# Step 3

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

A white rectangular overlay containing a Microsoft login form. The background of the slide is a scenic view of a city at sunset, with hills and water visible.

 Microsoft

@allwaysprovider.org

### Update your password

You need to update your password because this is the first time you are signing in, or because your password has expired.

Current password

New password

Confirm password

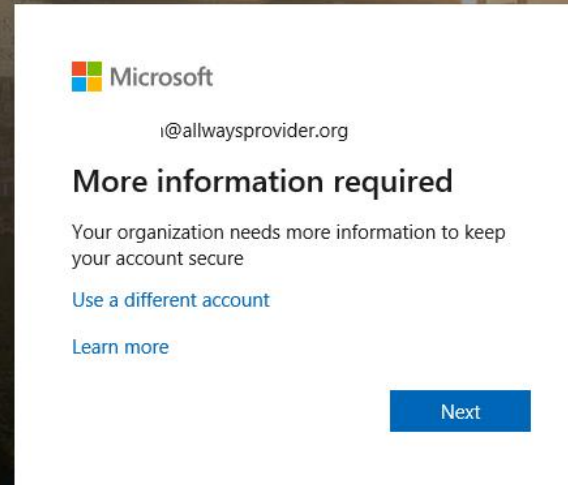
[Sign in](#)

[Terms of use](#) [Privacy & cookies](#) ...

# Step 4

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

Click “Next” to continue.





## Step 5

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

don't lose access to your account!

To make sure you can reset your password, we need to collect some info so we can verify who you are. We won't use this to spam you - just to keep your account more secure. **You'll need to set up at least 2 of the options below.**

 Authentication Phone is set to [Verify](#)

 Authentication Email is not configured. [Set it up now](#)

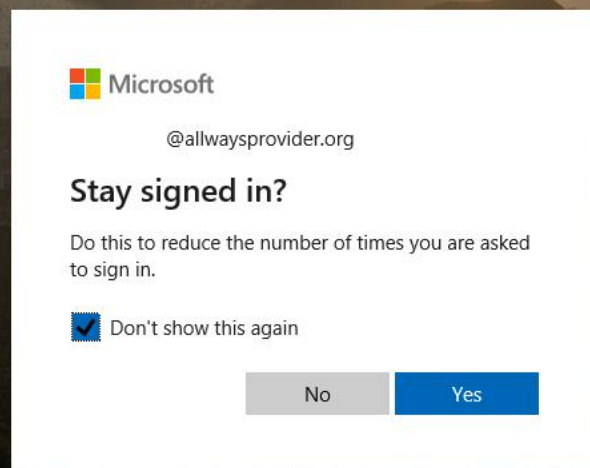
[finish](#)

[cancel](#)

# Step 6

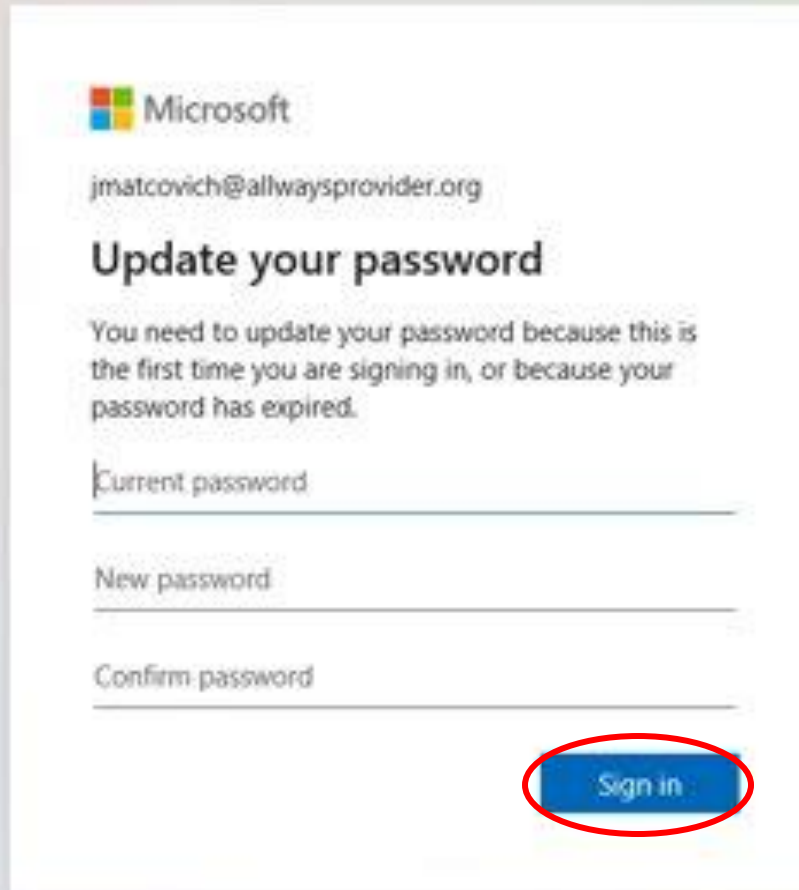
Next you will be asked if you want to stay signed in.

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



## 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.”

A screenshot of a Microsoft password update pop-up box. At the top left is the Microsoft logo. Below it is the email address 'jmatcovich@allwaysprovider.org'. The main heading is 'Update your password'. Below the heading is a message: 'You need to update your password because this is the first time you are signing in, or because your password has expired.' There are three input fields: 'Current password', 'New password', and 'Confirm password'. At the bottom right is a blue 'Sign in' button, which is circled in red.

Microsoft

jmatcovich@allwaysprovider.org

### Update your password

You need to update your password because this is the first time you are signing in, or because your password has expired.

Current password

New password

Confirm password

Sign in

[Terms of use](#) [Privacy & cookies](#)

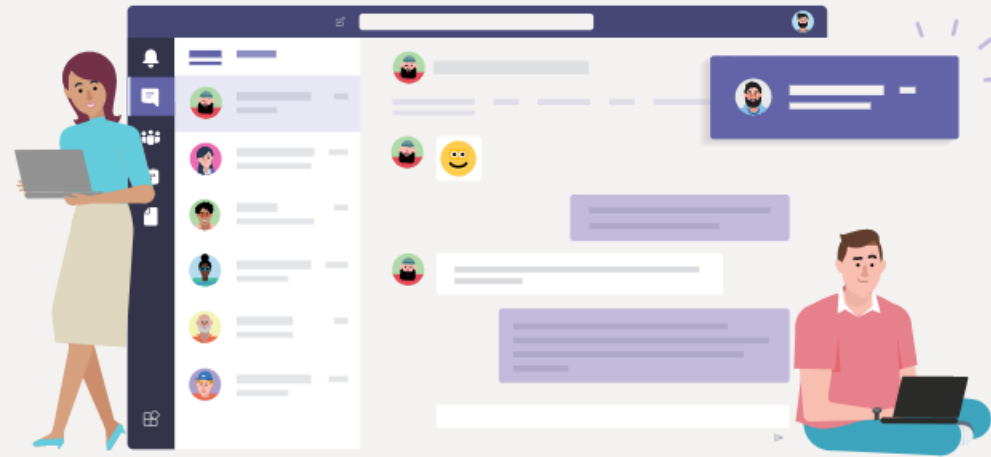
## Step 7

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.**

### Microsoft Teams



Download the Teams desktop app and stay better connected.

[Get the Windows app](#)

[Use the web app instead](#)

[Legal](#) [Privacy and Cookies](#) © 2020 Microsoft

Microsoft Teams

Search or type a command

JM

Bookings

Calendar

...

Apps

Help


Bookings

Schedule

About

# Step 8

You will see this screen.  
Click “get started.”



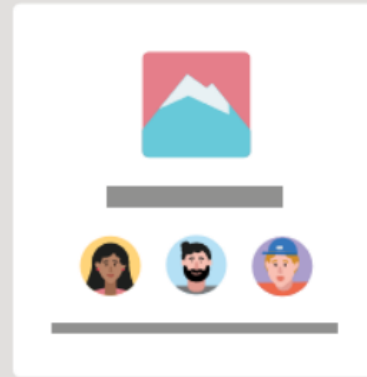
**Welcome to Bookings**  
Simplify how you schedule and manage appointments.

Get started

## Step 9

Teams will walk you through a quick tutorial.

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



### Bring your team together

Create a collaborative workspace for your team and let anybody join, or keep it private. Use channels to organize activity by topic, area, or anything else.

Next



Bookings



Bookings

[Schedule](#)[About](#)

Calendar



# 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

Add a business or select an existing one

New Business

Existing Business

Cancel



Apps



Help



Microsoft Teams

Search or type a command

JM

Bookings

Calendar

...

Apps

Help

Bookings

Schedule

About

Step 11

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

+ New booking

Add staff

4 AM

5 AM

6 AM

7 AM

8 AM

A decorative vertical bar on the left side of the slide, composed of several overlapping orange and light orange rounded rectangles.

## **Booking an appointment**

Microsoft Teams

Search or type a command

JM

Bookings

Schedule

About

<

>

Friday, March 20, 2020

Example Care Center

+ New booking

Add staff

CL

Chris

Appointment manager

HI

HJ INC

Clinician

JM

John

User administrator

2 PM

3 PM

4 PM

5 PM

6 PM

7 PM

8 PM

9 PM

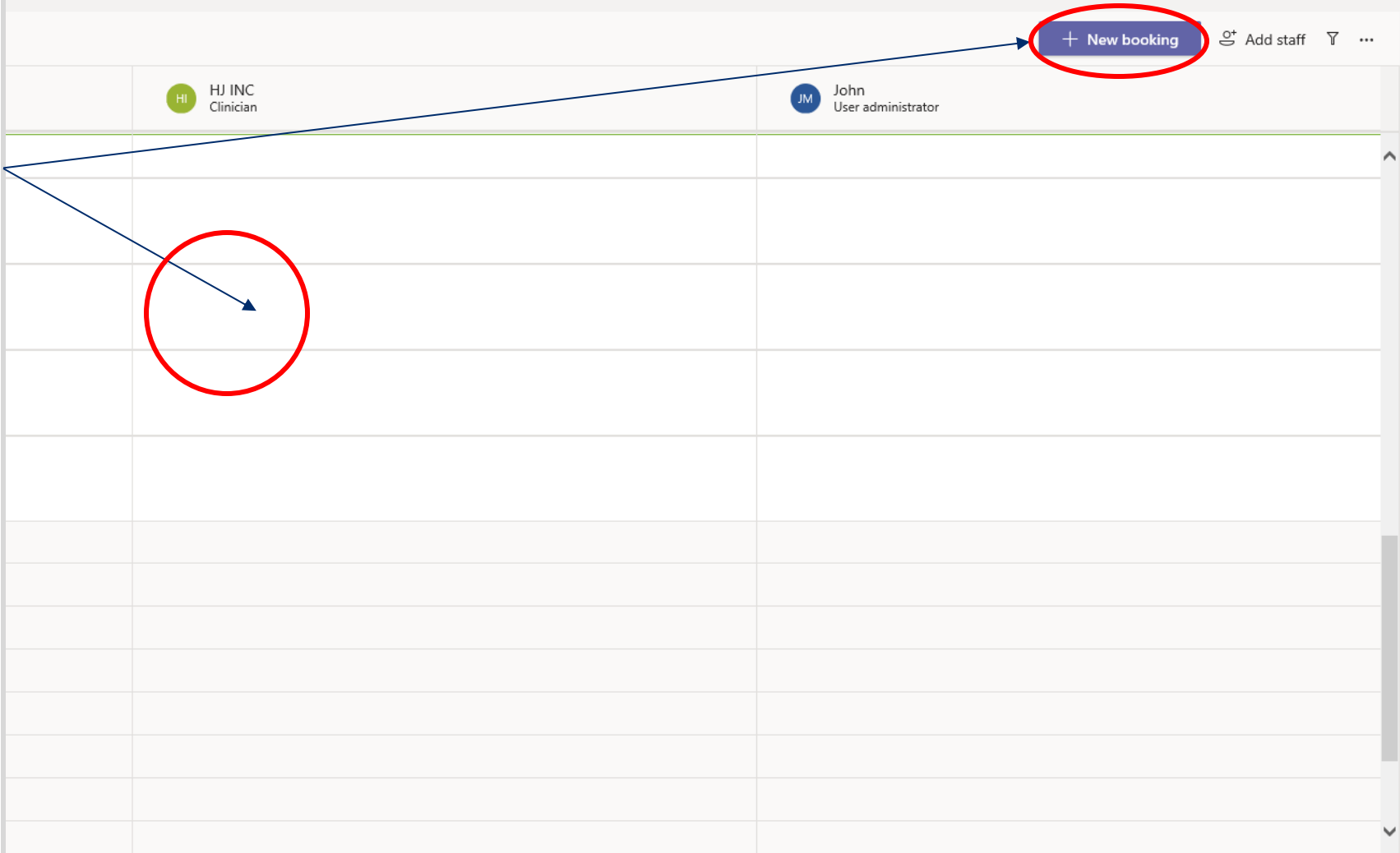
Step 1

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.



Microsoft Teams

Search or type a command

JM

Bookings

Calendar

...

Apps

Help

Bookings

Schedule

About

Initial consult

Send

From

Example Care Center

Patient first name

Patient email

Patient phone number

☐ Attendees have consented to email communication. [Learn more](#)

3/20/2020

3:00 PM

→

3/20/2020

3:30 PM

30m

HJ INC

X

Microsoft Teams Meeting

Add a note (internal use only).

Add an email reminder

To attendee 1 day prior

To staff 1 day prior

Close

## Step 3

This is the screen to create an appointment.

Click the appointment type in the upper left.

Microsoft Teams

Search or type a command

JM

Bookings

Schedule

About

Initial consult

Primary Care Virtual Visit

are Center

Patient email

Patient phone number

Attendees have consented to email communication. [Learn more](#)

3/20/2020

5:00 PM

→

3/20/2020

5:30 PM

30m

HJ INC

Microsoft Teams Meeting

Add a note (internal use only).

Add an email reminder

To attendee 1 day prior

To staff 1 day prior

Close

# 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.**

Microsoft Teams

Search or type a command

Bookings Schedule About

Primary Care Virtual Visit

Send From: Example Care Center

Patient Example example@email.com 555-555-5555

☒ Attendees have consented to email communication. [Learn more](#)

3/20/2020 5:00 PM → 3/20/2020 5:30 PM 30m

HJ INC

Microsoft Teams Meeting

Add a note (internal use only).

Add an email reminder

To attendee 1 hour prior

## 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"

Microsoft Teams

Search or type a command

JM

Bookings

Calendar

Apps

Help

Bookings

Schedule

About

Primary Care Virtual Visit

Send

From: Example Care Center

Patient Example

example@email.com

555-555-5555

Attendees have consented to email communication. Learn more

3/20/2020

5:00 PM

→

3/20/2020

5:30 PM

30m

HJ INC

Microsoft Teams Meeting

Add a note (internal use only).

Add an email reminder

To attendee 1 hour prior

Close

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.

Microsoft Teams

Search or type a command

JM

Bookings

Schedule

About

Primary Care Virtual Visit

Send

From: Example Care Center

Patient Example

example@email.com

555-555-5555

Attendees have consented to email communication. [Learn more](#)

3/20/2020

5:00 PM

→

3/20/2020

5:30 PM

30m

HI HJ INC

Microsoft Teams Meeting

Add a note (internal use only).

Add an email reminder

To attendee 1 hour prior

Close

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.**

Microsoft Teams

Search or type a command

JM

Bookings

Schedule

About

Primary Care Virtual Visit

Send

From: Example Care Center

Patient Example

example@email.com

555-555-5555

Attendees have consented to email communication. [Learn more](#)

3/20/2020

5:00 PM

→

3/20/2020

5:30 PM

30m

HJ INC

Microsoft Teams Meeting

Add a note (internal use only).

Add an email reminder

To attendee 1 hour prior

Close

Step 7

Once fill out the entire appointment form, click send

Microsoft Teams

Search or type a command

JM

Bookings

Schedule

About

<

>

Friday, March 20, 2020

Example Care Center

CL

Chris

Appointment manager

HI

HJ INC

Clinician

4 PM

5 PM

6 PM

7 PM

8 PM

9 PM

10 PM

11 PM

Primary Care Virtual Visit

+

Add staff

Y

...

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.

A decorative vertical bar on the left side of the slide, composed of several overlapping orange and light orange rounded rectangles.

## **Cancelling an appointment**

Microsoft Teams

Search or type a command

JM

Bookings

Schedule

About

< > Friday, March 20, 2020 Example Care Center

CL Chris  
Appointment manager

HI HJ INC  
Clinician

4 PM

5 PM

6 PM

7 PM

8 PM

9 PM

10 PM

11 PM

Primary Care Virtual Visit

Add staff

Step 1

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

Bookings

Calendar

Apps

Help

Microsoft Teams

Search or type a command

JM

Bookings

Schedule

About

Primary Care Virtual Visit

Save

From: Example Care Center

Patient Example

example@email.com

555-555-5555

☒

Attendees have consented to email communication. [Learn more](#)

3/20/2020

5:00 PM

→

3/20/2020

5:30 PM

30m

HI

HJ INC

X

Microsoft Teams Meeting

NOTICE: Messages exchanged in chat with external attendees are stored based on settings configured by your Microsoft Teams administrator.

Join Microsoft Teams Meeting

[https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1%40thread.v2/0?context=%7b%22Tid%22%3a%22286c4fba1-c312-4648-960a-23b2ba2fb9bc%22%2c%22Oid%22%3a%22f801bedc-e372-47bb-bc28-dca4640e313d%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1%40thread.v2/0?context=%7b%22Tid%22%3a%22286c4fba1-c312-4648-960a-23b2ba2fb9bc%22%2c%22Oid%22%3a%22f801bedc-e372-47bb-bc28-dca4640e313d%22%7d)

If you need a local number, get one here. And if you've forgotten the dial-in PIN, you can reset it.

Learn more about Teams <https://aka.ms/JoinTeamsMeeting>

Meeting options: [https://teams.microsoft.com/meetingOptions/?organizerId=f801bedc-e372-47bb-bc28-dca4640e313d&tenantId=86c4fba1-c312-4648-960a-23b2ba2fb9bc&threadId=19\\_meeting\\_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1@thread.v2&messageId=0&language=en-US](https://teams.microsoft.com/meetingOptions/?organizerId=f801bedc-e372-47bb-bc28-dca4640e313d&tenantId=86c4fba1-c312-4648-960a-23b2ba2fb9bc&threadId=19_meeting_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1@thread.v2&messageId=0&language=en-US)

Footer

Cancel booking

Close

Step 2

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

Microsoft Teams

Search or type a command

JM

Bookings

Schedule

About

Primary Care Virtual Visit

Save | From: Example Care Center

Patient Example

example@email.com

555-555-5555

Attendees have consented to email communication.

Learn more

3/20/2020

5:00 PM

→

3/20/2020

5:30 PM

30m

HJ INC

Microsoft Teams Meeting

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https://teams.microsoft.com/l/meetup-join/19%3ameeting\_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1%40thread.v2/0?context=%7b%22Tid%22%3a%2286c4fba1-c312-4648-960a-23b2ba2fb9bc%22%2c%22Oid%22%3a%22f801bedc-e372-47bb-bc28-dca4640e313d%22%7d

If you need a local number, get one here. And if you've forgotten the dial-in PIN, you can reset it.

Learn more about Teams https://aka.ms/JoinTeamsMeeting Meeting options: https://teams.microsoft.com/meetingOptions/?organizerId=f801bedc-e372-47bb-bc28-dca4640e313d&tenantId=86c4fba1-c312-4648-960a-23b2ba2fb9bc&threadId=19\_meeting\_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1@thread.v2&messageId=0&language=en-US

Footer

Cancel booking

Close

Step 3

Click "cancel booking" in the top right

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

27

Microsoft Teams

Bookings

Schedule

About

Primary Care Virtual Visit

Save

From: Example Care Center

Patient Example

example@email.com

555-555-5555

☒ Attendees have consented to email communication. [Learn more](#)

3/20/2020

5:00 PM

→

3/20/2020

5:30 PM

30m

HJ INC

Microsoft Teams Meeting

NOTICE: Messages exchanged in chat with external attendees are stored based on settings configured by Teams administrator.

Join Microsoft Teams Meeting

[https://teams.microsoft.com/l/meetup-join/19%3ameeting\\_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1%40thread.v2/0?context=%7b%22Tid%22%3a%2286c4fba1-c312-4648-960a-23b2ba2fb9bc%22%2c%22Oid%22%3a%22f801bedc-e372-47bb-bc28-dca4640e313d%22%7d](https://teams.microsoft.com/l/meetup-join/19%3ameeting_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1%40thread.v2/0?context=%7b%22Tid%22%3a%2286c4fba1-c312-4648-960a-23b2ba2fb9bc%22%2c%22Oid%22%3a%22f801bedc-e372-47bb-bc28-dca4640e313d%22%7d)

If you need a local number, get one here. And if you've forgotten the dial-in PIN, you can reset it.

Learn more about Teams

<https://aka.ms/JoinTeamsMeeting>

Meeting options: [https://teams.microsoft.com/meetingOptions/?organizerId=f801bedc-e372-47bb-bc28-dca4640e313d&tenantId=86c4fba1-c312-4648-960a-23b2ba2fb9bc&threadId=19\\_meeting\\_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1@thread.v2&messageId=0&language=en-US](https://teams.microsoft.com/meetingOptions/?organizerId=f801bedc-e372-47bb-bc28-dca4640e313d&tenantId=86c4fba1-c312-4648-960a-23b2ba2fb9bc&threadId=19_meeting_NWNmMTg0YmUtNDcwMy00YjU2LTk3NDAtOWEyMWY4ZmFhYmE1@thread.v2&messageId=0&language=en-US)

Footer

Are you sure?

This will cancel your appointment and attendees will be notified.

Close

Submit

Step 4

Confirm cancellation by clicking “submit”

The appointment is now cancelled.

Close

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

28