

AllWays on Teams

User Administrator Quickstart Guide

June 2020



Step 1

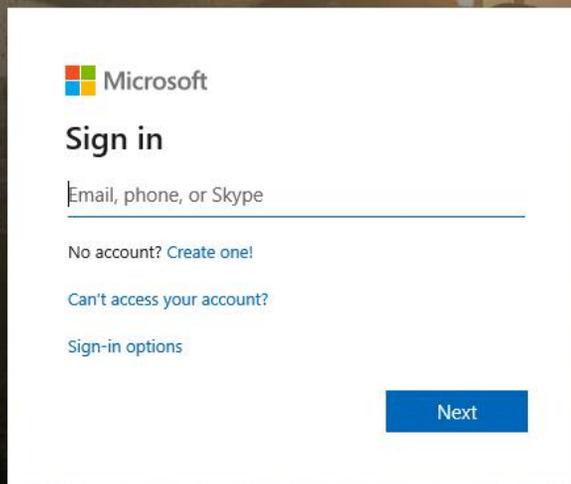
Go to <http://teams.microsoft.com/>.

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 screenshot of the Microsoft sign-in interface. At the top left is the Microsoft logo. Below it is the text "Sign in". There 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 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"

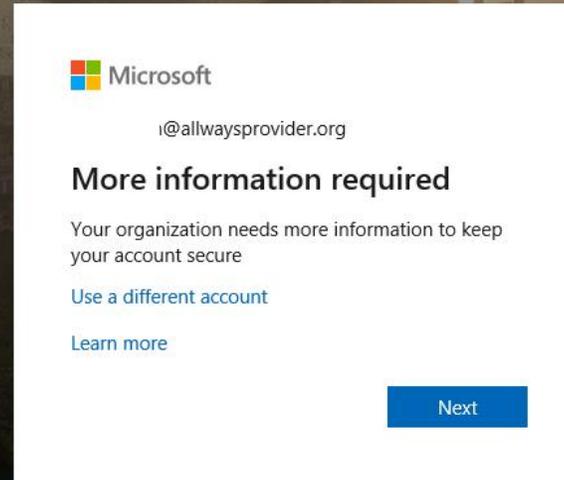


The screenshot shows a white dialog box with the Microsoft logo and the text "@allwaysprovider.org". The main heading is "Update your password". Below this, a message states: "You need to update your password because this is the first time you are signing in, or because your password has expired." There are three input fields labeled "Current password", "New password", and "Confirm password". A blue "Sign in" button is located at the bottom right of the dialog box.

Step 4

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

Click “Next” to continue.



The screenshot shows a white dialog box with the Microsoft logo at the top left. Below the logo is the email address 'i@allwaysprovider.org'. The main heading is 'More information required'. The text below reads 'Your organization needs more information to keep your account secure'. There are two blue links: 'Use a different account' and 'Learn more'. At the bottom right is a blue button labeled 'Next'.

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

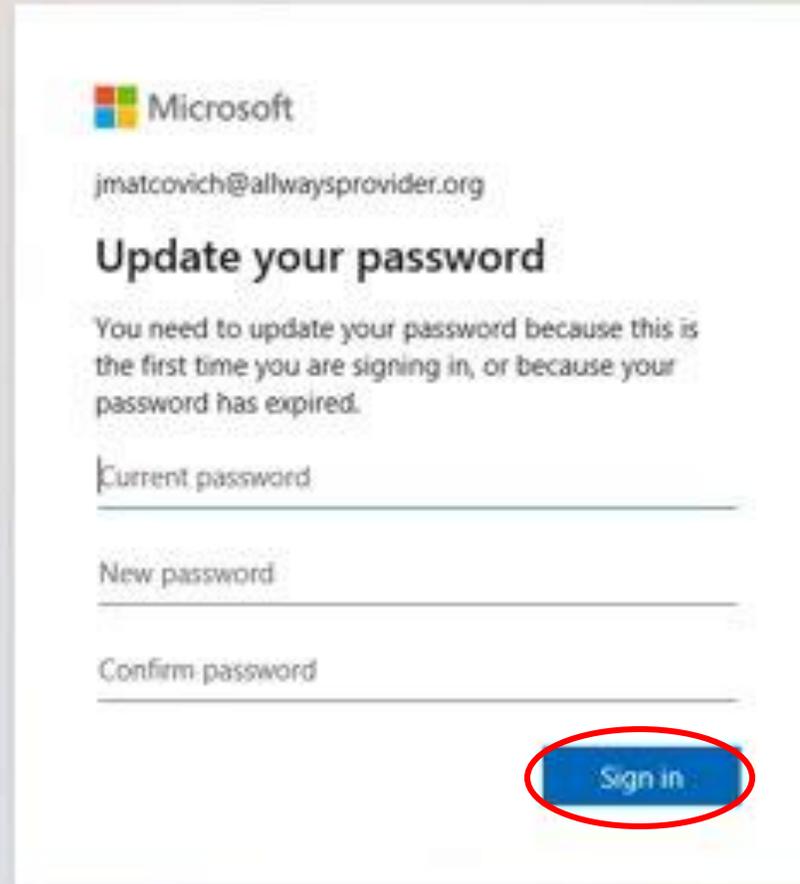
Next you will be asked if you want to stay signed in.

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.”



The screenshot shows a Microsoft login prompt. 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, there is a blue 'Sign in' button, which is circled in red.

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

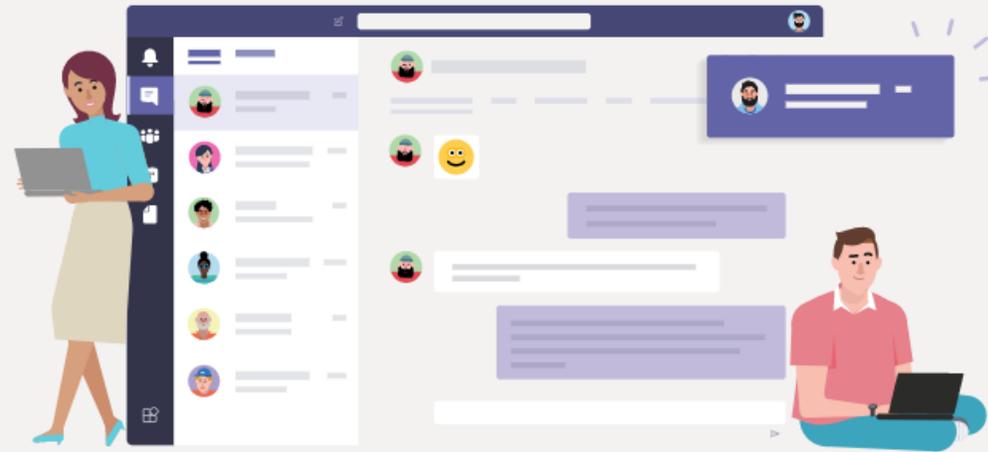
Step 7

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



Bookings



Bookings

Schedule

About



Calendar



Step 8

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



Welcome to Bookings

Simplify how you schedule and manage appointments.

Get started



Apps



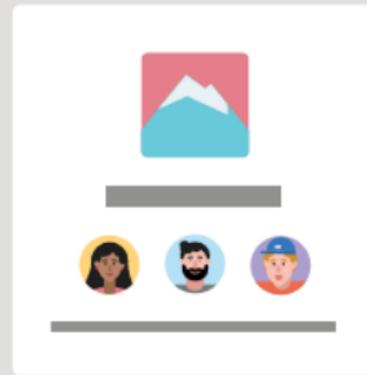
Help



Step 9

Teams will walk you through a quick tutorial.

For security reasons, some of the features mentioned might not be available for your account.



Bring your team together

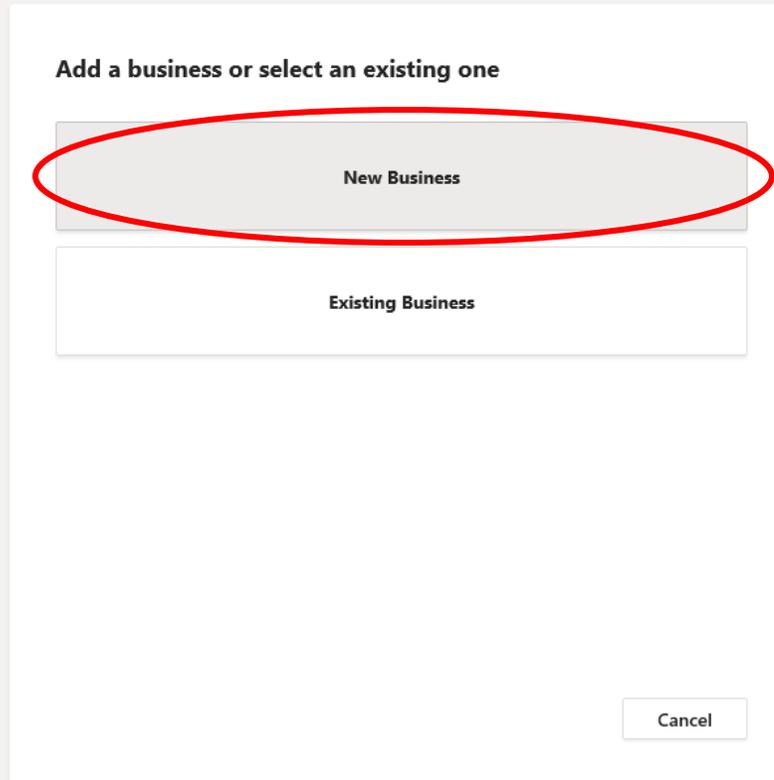
Create a collaborative workspace for your team and let anybody join, or keep it private. Use channels to organize activity by topic, area, or anything else.

Next

Step 10

As the User Administrator, you must now create the account for your practice. Click “new business”

NOTE: Once you set up the account, the other users at your practice will be able to join your account by clicking “Existing Business” and searching for the practice name





Bookings

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

Calendar



Step 11

Enter the required information and click "save"

Add a business

Business name, email, and phone number will appear in appointment invites. You can change this info later in Settings. Field with * is required.

Business or department name *

Example Care Center

Business type *

Healthcare

Send email responses to

example@email.com

Business phone number

(555)555-5555

< Back

Cancel

Save



Apps



Help





Bookings

Calendar

Bookings Schedule About

Step 12

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



Apps



Help





Step 13

Now you need to add the users to your practice.

Please note that all users must log in and register before you can add them. Begin by clicking "add staff" in the upper right.

+ New booking **Add staff** ...



7 AM
8 AM



Bookings



Bookings Schedule About



Calendar



Step 14

The member's profile will **only appear** once you have typed their entire username. All usernames will end "@allwaysprovider.org".

Settings

Example Care Center

Business details

Appointment types

Staff

Staff

j

HJ INC
@AllWaysProvider.org

Add



Admin



5 AM

6 AM

7 AM



Apps



Help





Bookings



Calendar

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

Step 15

Once you've added all of your users, you are almost ready to start booking appointments.

Follow our “Creating Appointment Types” tutorial to continue the virtual visit setup.



Apps



Help



Settings

Example Care Center

- Business details
- Appointment types
- Staff**

Staff

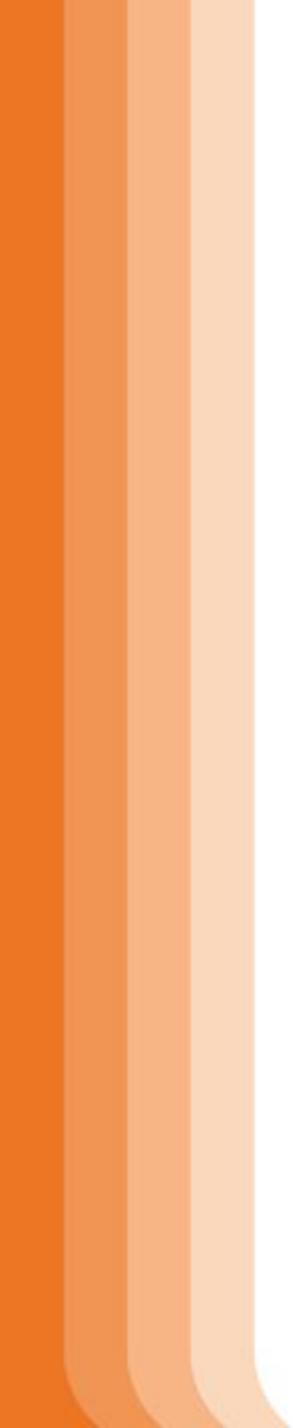
| | | Add |
|--|--------------------------------|--------|
| | Chris @AllWaysProvider.org | Viewer |
| | HJ INC @AllWaysProvider.org | Viewer |
| | John @AllWaysProvider.org | Admin |

Something went wrong

+ New booking

Add staff

John |
User administrator



Creating Appointment Types

- Bookings
- Calendar
- ...
- Apps
- Help
- Download

Bookings Schedule About

Step 2

Then, click "Settings."

| | HJ INC Clinician | John User administrator |
|-------|---------------------|----------------------------|
| 5 AM | | |
| 6 AM | | |
| 7 AM | | |
| 8 AM | | |
| 9 AM | | |
| 10 AM | | |
| 11 AM | | |

+ New booking Add staff ⌵ ...

- Settings
- Third-party notice
- Open in Bookings



Bookings



Calendar

**Bookings** [Schedule](#) [About](#)

Step 3

Once in Settings, click
"Appointment types"

2 AM
3 AM
4 AM
5 AM
6 AM
7 AM

Settings

Example Care Center

- Business details
- Appointment types**
- Staff

Staff

| | | | Add |
|--|--------------------------------|--------|-----|
| | Chris @AllWaysProvider.org | Viewer | |
| | HJ INC @AllWaysProvider.org | Viewer | |
| | John @AllWaysProvider.org | Admin | |

+ New booking

Add staff

John |
User administrator

Apps



Help



- Bookings
- Calendar
- ...
- Apps
- Help
- Download

Bookings Schedule About

Step 4

Click "+Add appointment type"

Settings

Example Care Center

- Business details
- Appointment types**
- Staff

Appointment types

+ Add appointment type

Initial consult



2 AM
3 AM
4 AM
5 AM
6 AM
7 AM

+ New booking Add staff

John
User administrator



Bookings



Bookings Schedule About



Calendar



Step 5

Give the appointment type template a name in the “title” field.

Enter a custom confirmation message. In the message, you can include the same information you’d provide for an in-person appointment of this type.

Something went wrong

[Back to settings](#) ✕

Add appointment type

Field with * is required

Title *

Primary Care Virtual Visit

Confirmation message ⓘ

You primary care virtual visit has been scheduled.

[Add an email reminder](#)

[Save](#)

John
User administrator

[+ New booking](#)

[Add staff](#) [Filter](#) [More](#)



Bookings

Bookings Schedule About



Calendar



Step 7

Use the dropdown menus to set who the reminder will go to and when the reminder will be sent.

You can also add a custom message to the reminder.

Back to settings

Add an email reminder

Recipient: Attendee Time: 1 hour

Reminder message: 58/1000
You have a virtual primary care visit scheduled in 1 hour.

Cancel Done

- Bookings
- Calendar
- ...
- Apps
- Help
- Download

Bookings Schedule About

Step 9

Click "Save" when you've finished entering all of the information for your template

3 AM
4 AM
5 AM
6 AM
7 AM

Something went wrong

< Back to settings

Add appointment type

Field with * is required

Title *

Primary Care Virtual Visit

Confirmation message ⓘ

You primary care virtual visit has been scheduled.

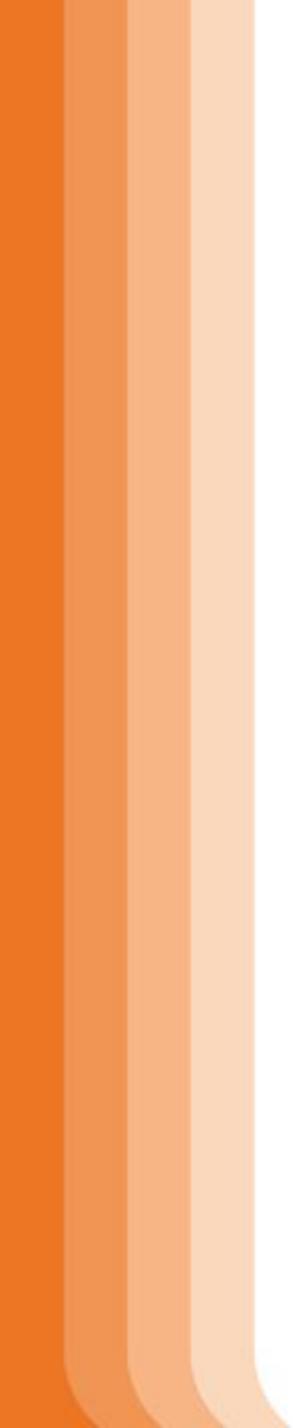
Add an email reminder

To attendee 1 hour prior

Save

+ New booking Add staff

John
User administrator



Booking an appointment



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





Bookings



Bookings Schedule About



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.

The screenshot displays the Microsoft Bookings interface. At the top, there is a search bar and a user profile for 'JM'. Below the search bar, the 'Bookings' section is active, with 'Schedule' and 'About' links. The main area shows a calendar grid for 'HJ INC Clinician'. A red circle highlights a specific time slot in the calendar. Another red circle highlights the '+ New booking' button in the top right corner. Blue arrows point from the text in the left box to these two elements.



Bookings



Calendar

**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



Apps



Help

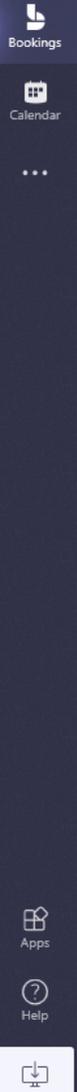


Step 3

This is the screen to create an appointment.

Click the appointment type in the upper left.

Close



Bookings Schedule About

Initial consult

- 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

Step 4

Close

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.



Bookings

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

Calendar

Primary Care Virtual Visit ▾

Send

From: Example Care Center

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

→ 30m

HJ INC ✕

Microsoft Teams Meeting

Add a note (internal use only).

[Add an email reminder](#)**To attendee 1 hour prior**

Step 5

Close

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



Bookings

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



Calendar

Primary Care Virtual Visit ▾

[Send](#) From: Example Care Center

Patient Example

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

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

HJ INC ×

Full privacy and security statement:

By using this app, you are confirming that you are complying with regulations and laws applicable to the use of unencrypted e-mail for communications between healthcare providers and patients, including any safeguards and consents required to protect attendee privacy, such as limiting the amount or type of information disclosed in appointment messages. Subject to applicable law and regulations, this app should only be used to send appointment notifications if attendees have provided consent to receive appointment information via email. Make sure your Notice of Privacy Practices (NPP) or similar notice is up to date and includes information about opting in for appointment reminders by SMS and/or email. Attendee confirmation and reminder messages sent from this app : Attendee First Name Appointment date and time Staff members first and last names Appointment Type Title Appointment Type Confirmation Message Business name, email and phone number It is your responsibility to comply with state, local and federal regulations related to Personal Health Information included in any communication.

Note:

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

Click “learn more” to read the privacy and security statement. It is your responsibility to inform your patients about how their data is being protected, used, and stored by AllWays on Teams.

Please note that the only three pieces of information we store are the patient name, phone number, and email address as they are entered into the appointment invitation.



Bookings



Calendar

**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** 

Apps



Help



Step 6

Close

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.



Bookings



Calendar

**Bookings** [Schedule](#) [About](#)**Primary Care Virtual Visit** ▾**Send** From: Example Care Center Patient Example 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** 

Apps



Help



Step 7

Close

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.

- Bookings
- Calendar
- ...
- Apps
- Help
- Download

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 7

Close

Once fill out the entire appointment form, click send

**Bookings** Schedule About

< > Friday, March 20, 2020 Example Care Center

CL Chris
Appointment managerHI HJ INC
Clinician

4 PM

5 PM

6 PM

7 PM

8 PM

9 PM

10 PM

11 PM

Primary Care Virtual Visit

NOTE: We recommend that patients use a mobile device for their video visit. This will ensure that they have a microphone and camera.

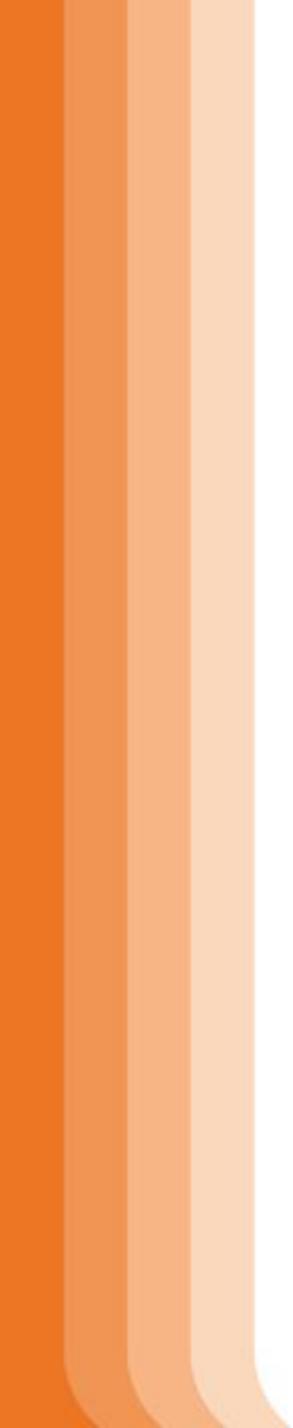
Before the visit, patients must install the free Teams app on their mobile device. This takes less than a minute. Once the app is installed, they can join the meeting without having a Teams account.

Please see detailed steps in the Patient Quick Start Guide.

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

Bookings
Calendar
Apps
Help

Bookings Schedule About

Friday, March 20, 2020 Example Care Center

| | Chris Appointment manager | HJ INC Clinician |
|-------|------------------------------|----------------------------|
| 4 PM | | |
| 5 PM | | Primary Care Virtual Visit |
| 6 PM | | |
| 7 PM | | |
| 8 PM | | |
| 9 PM | | |
| 10 PM | | |
| 11 PM | | |

Step 1

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



Bookings



Calendar

Bookings [Schedule](#) [About](#)**Primary Care Virtual Visit**

Save From: Example Care Center

 Patient Example 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 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%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

Step 2

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

Cancel booking

Close



Apps



Help





Bookings



Calendar

**Bookings** [Schedule](#) [About](#)**Primary Care Virtual Visit**[Save](#) From: Example Care Center Patient Example Attendees have consented to email communication. [Learn more](#) 3/20/2020 5:00 PM 3/20/2020 5:30 PM HJ INC

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%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

Step 3

Click "cancel booking" in the top right

Close



Apps



Help





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

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

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.