AllWays on Teams
User Administrator Quickstart Guide

June 2020

allways HEALTH PARTNERS

A MEMBER OF PARTNERS HEALTHCARE

Step 1

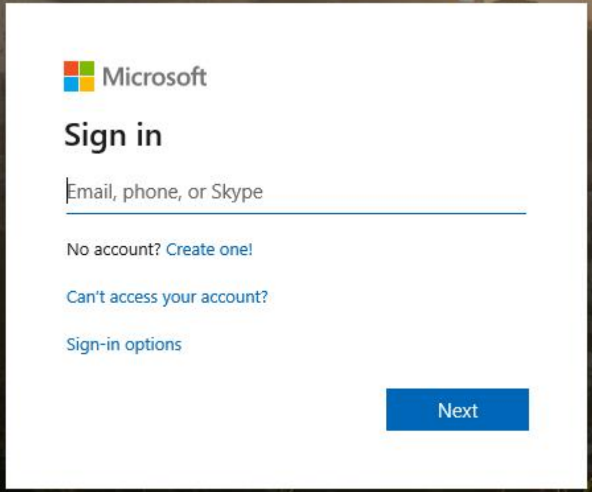
Go to http://teams.microsoft.com/.

> **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

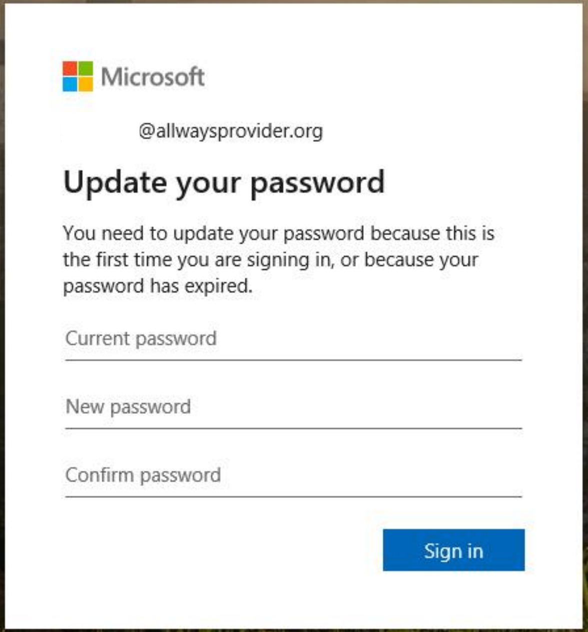
We sent your username and password in separate email. Your username is an email address.

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"

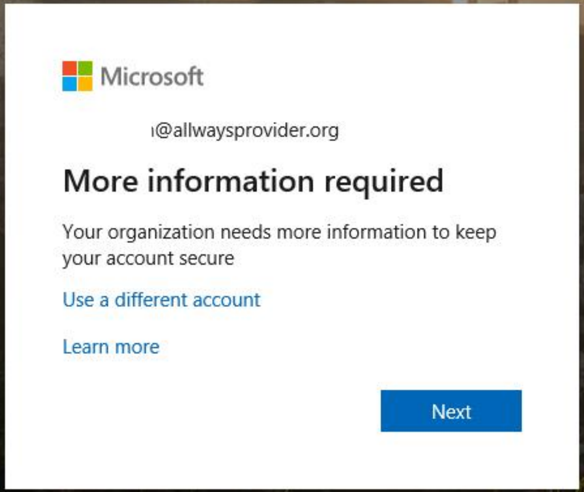


Terms of use Privacy & cookies ...

Step 4

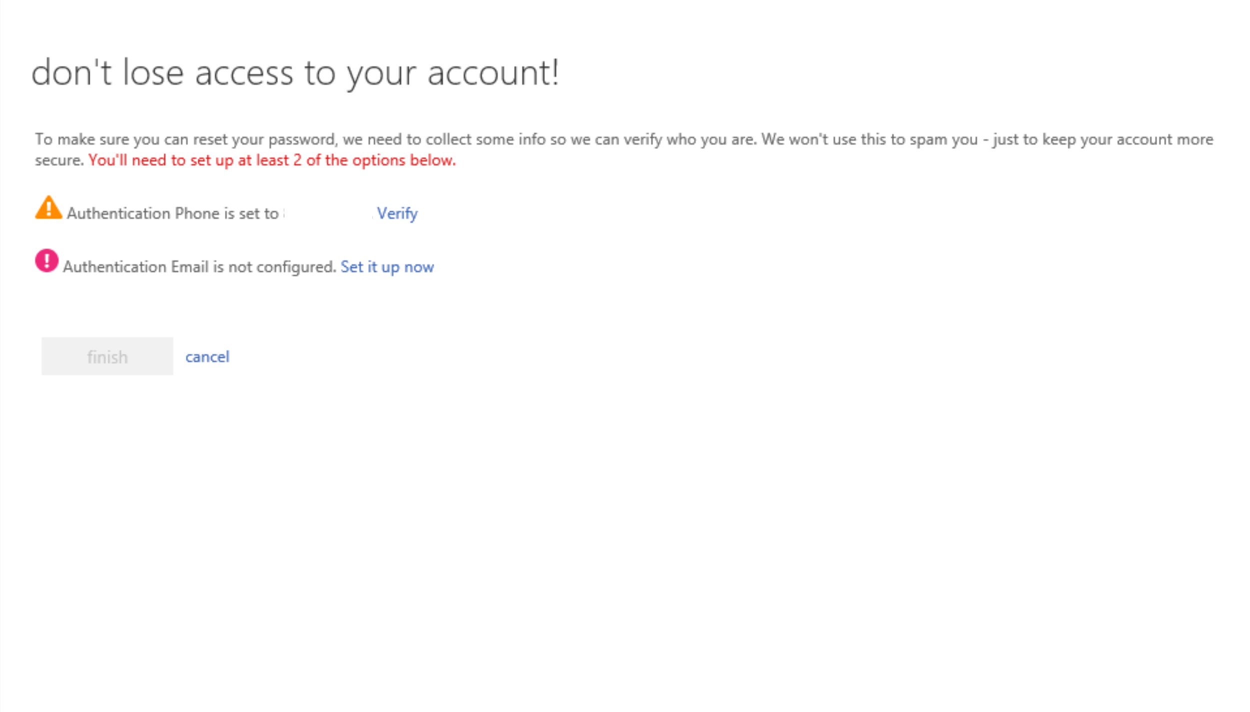
You will need to verify your contact information before you log into the service.

Click “Next” to continue.



Step 5

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



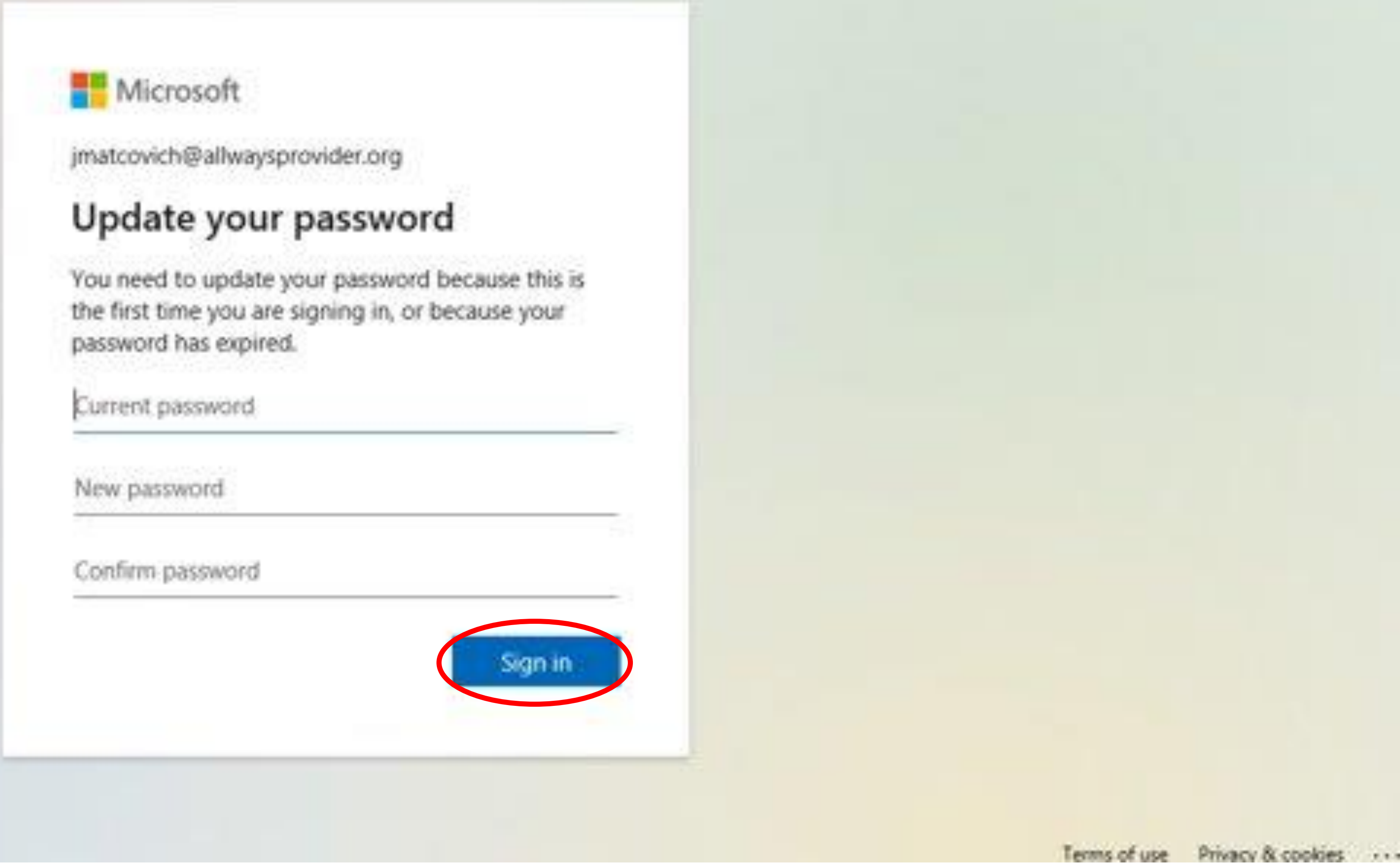
Step 6

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."

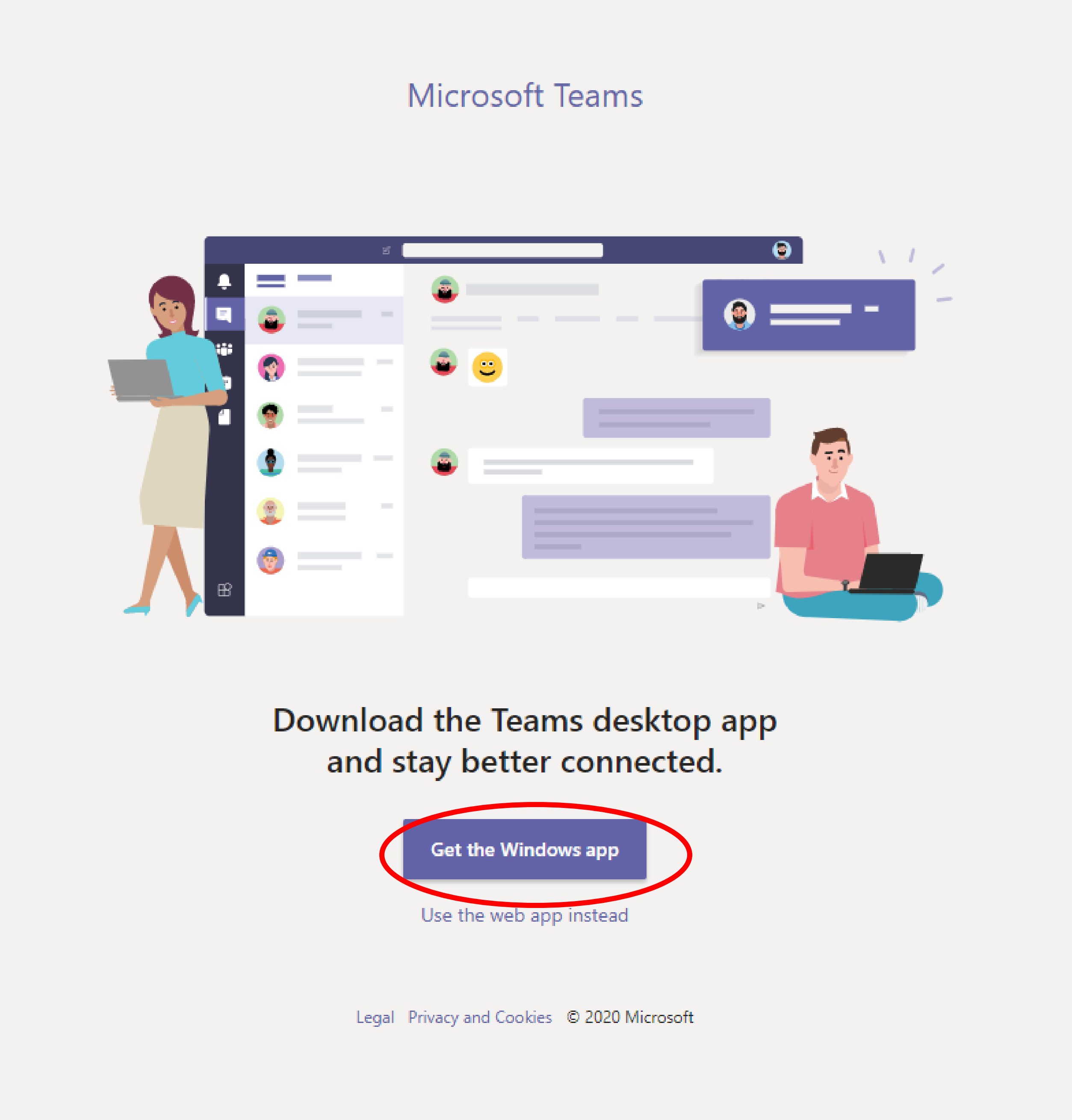


Step 7

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

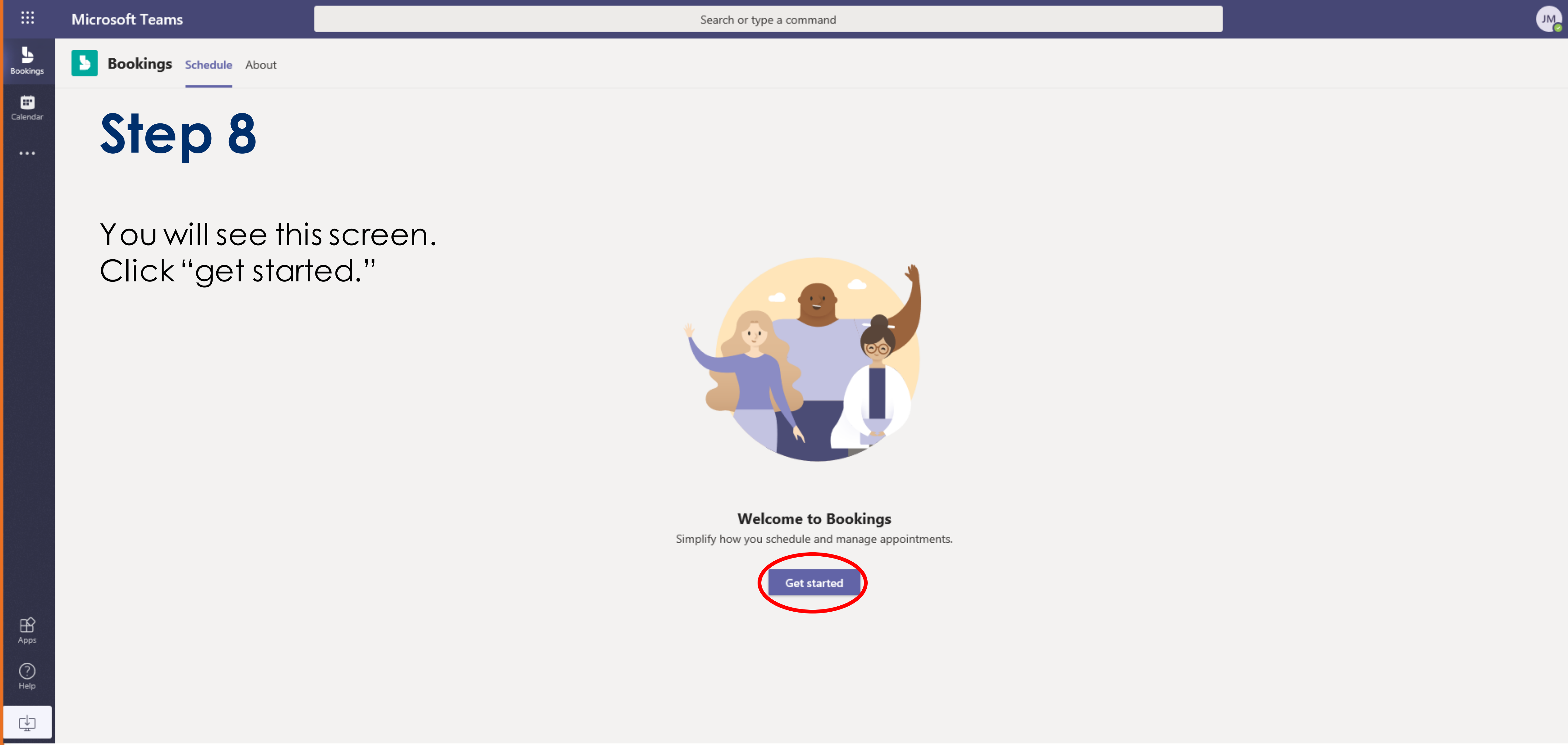
For the best experience, we recommend downloading the app to your device instead of using the web app.

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

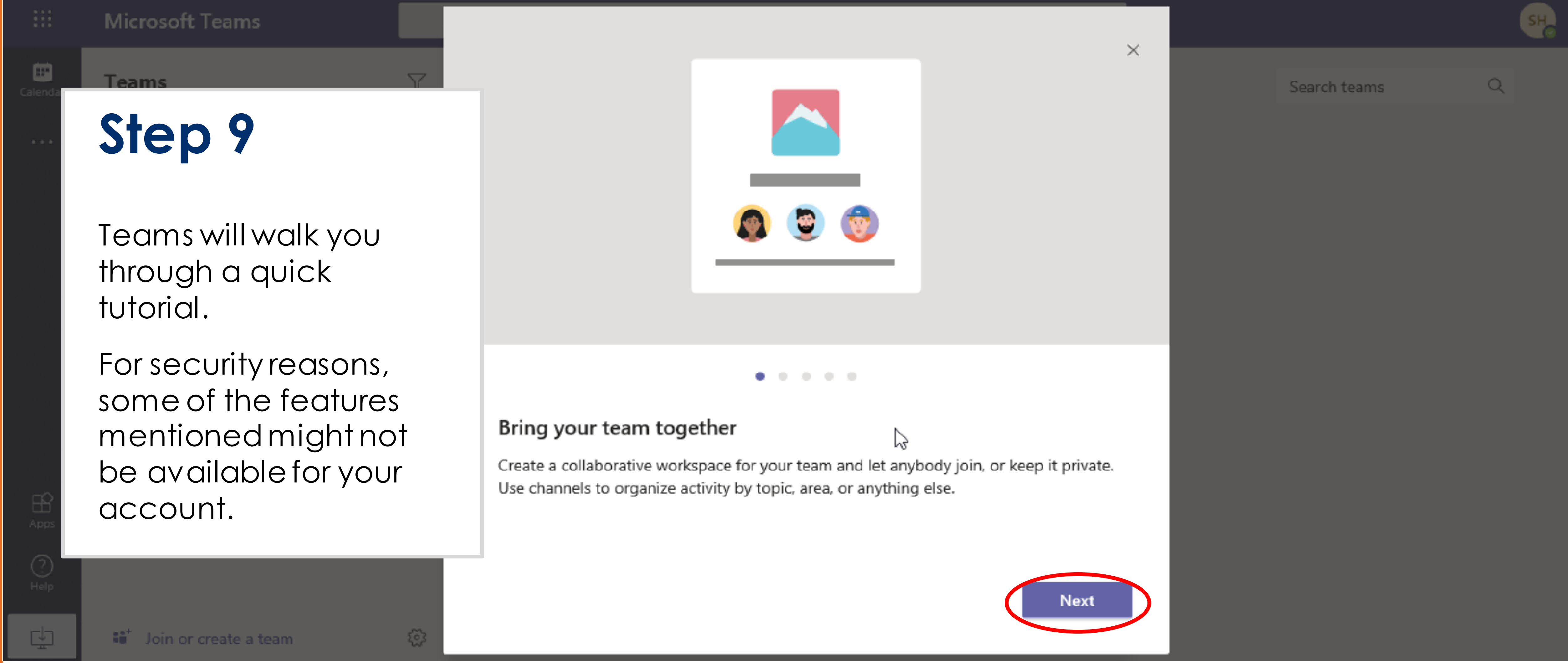
You will see this screen.
Click "get started."



Step 9

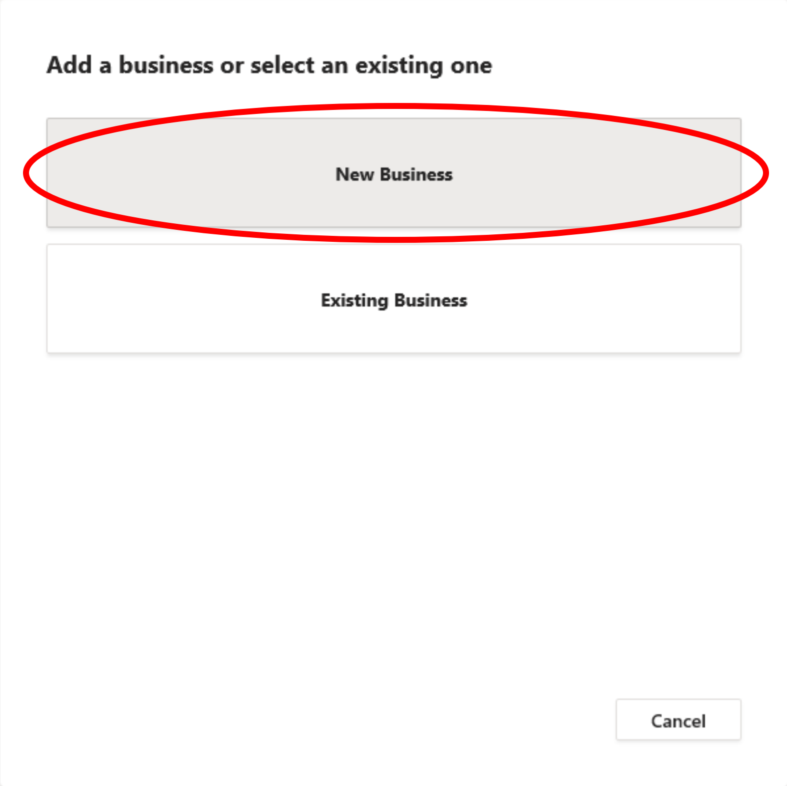
Teams will walk you through a quick tutorial.

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



Step 10

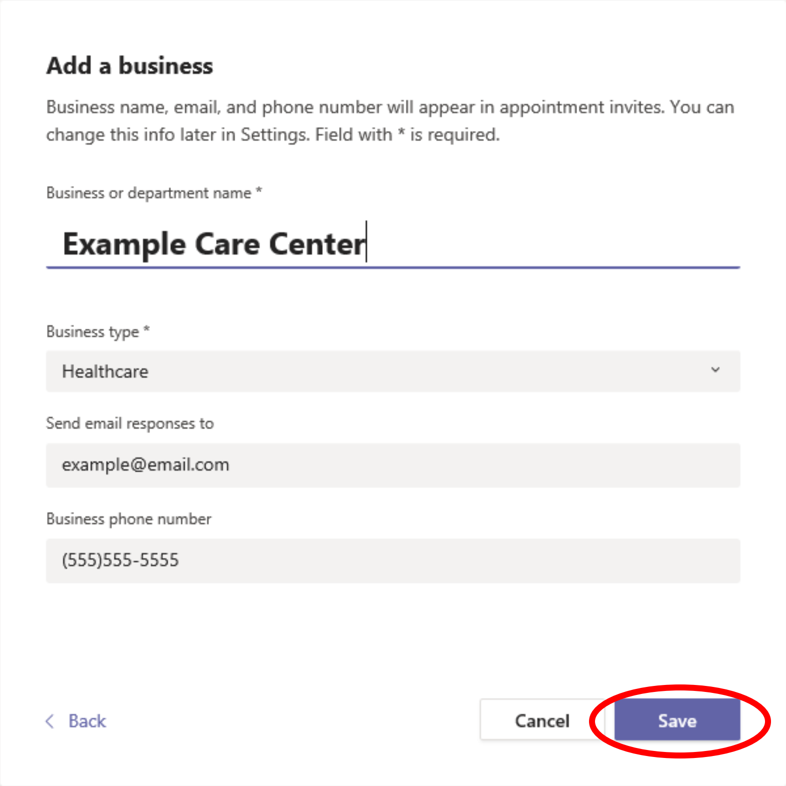
As the User Administrator, you must now create the account for your practice. Click "new business"



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

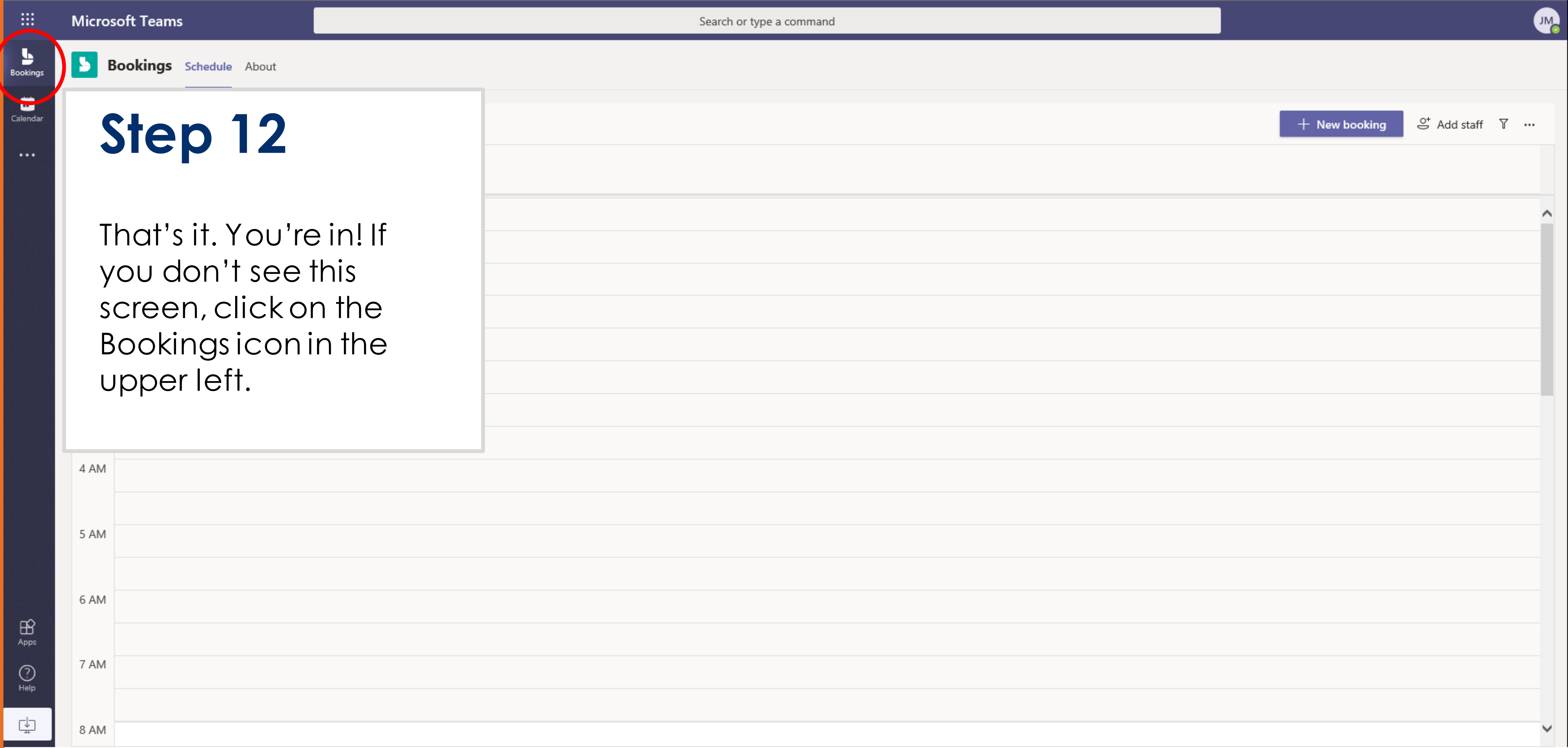
Step 11

Enter the required information and click "save"



Step 12

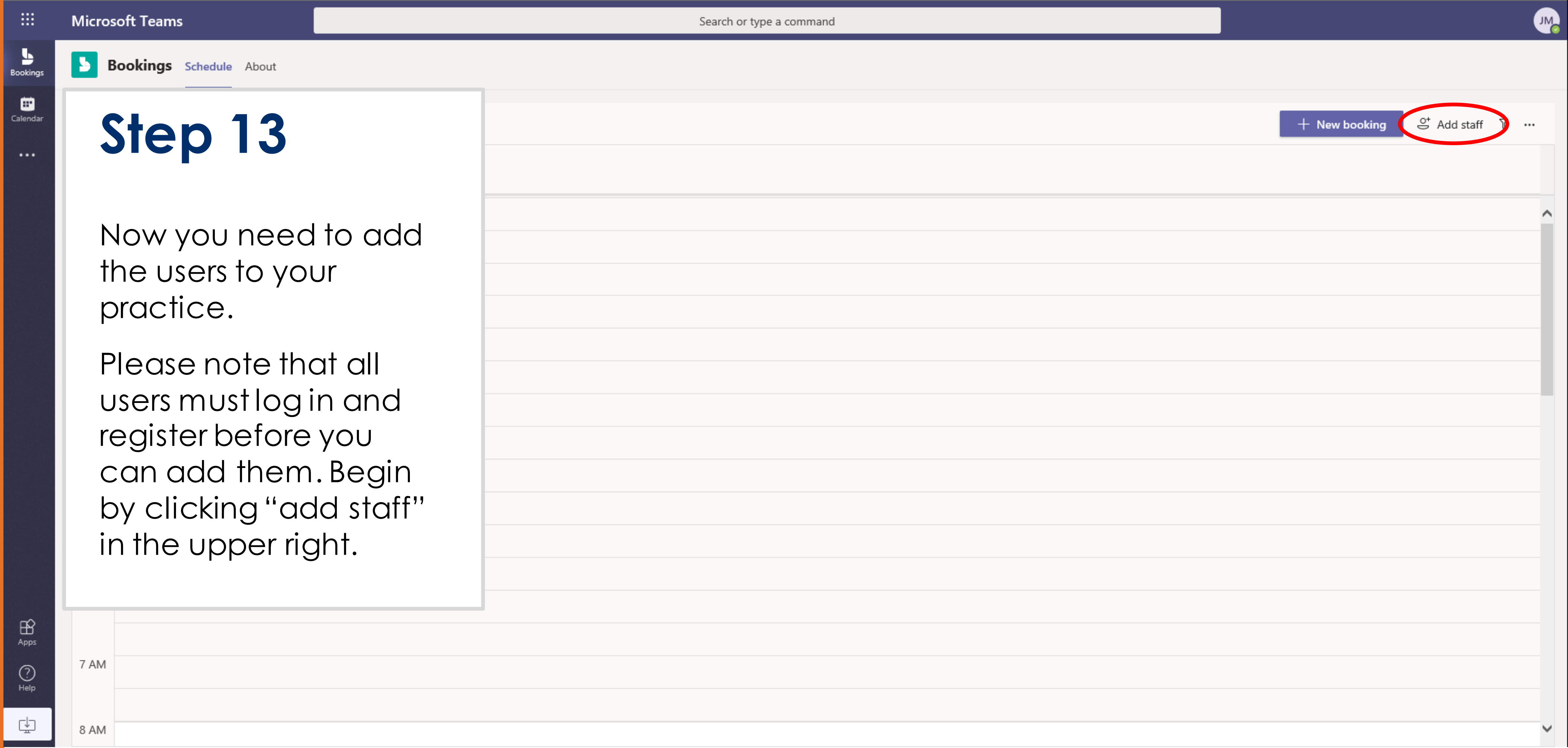
That's it. You're in! If you don't see this screen, click on the Bookings icon in the upper left.

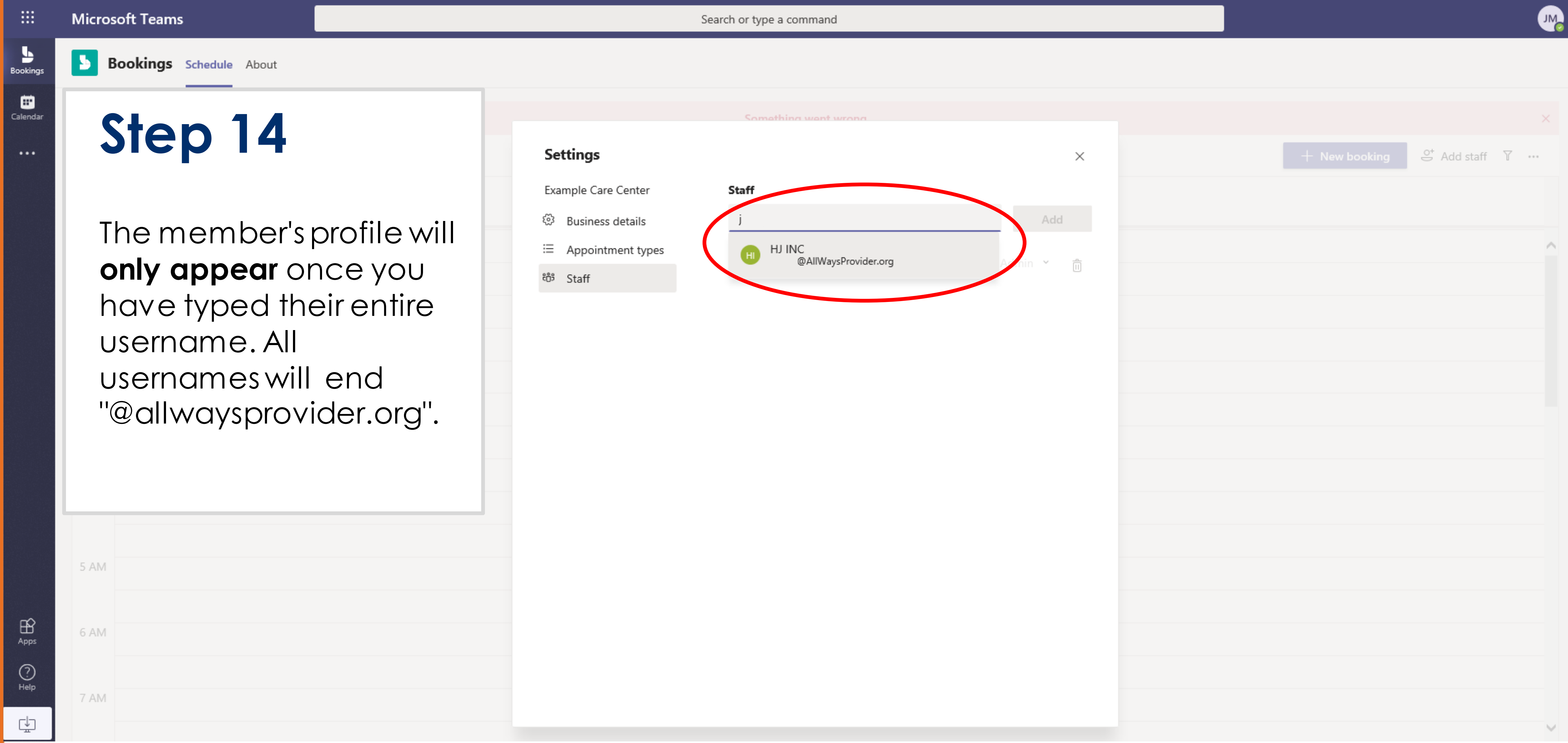


Step 13

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.





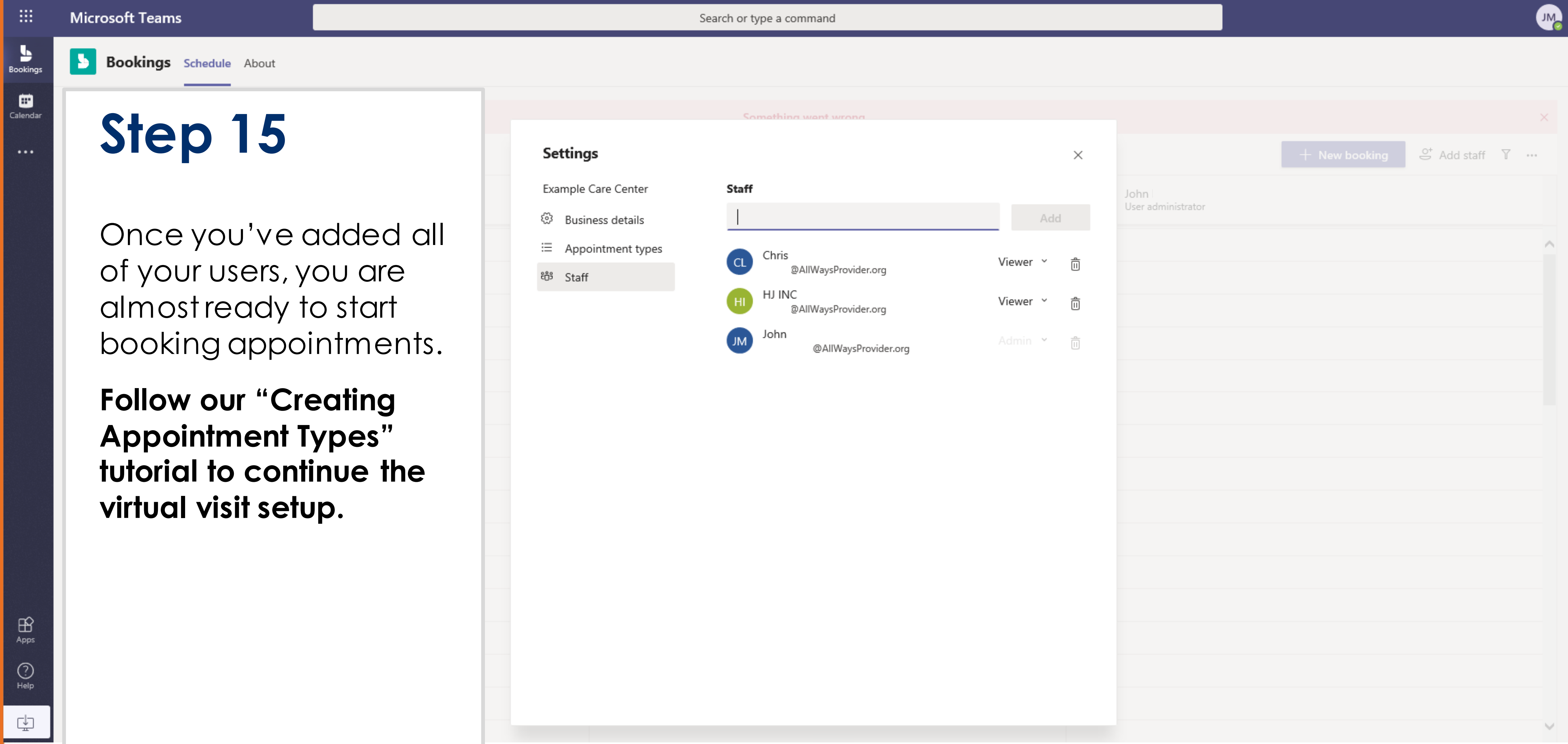
Step 14

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

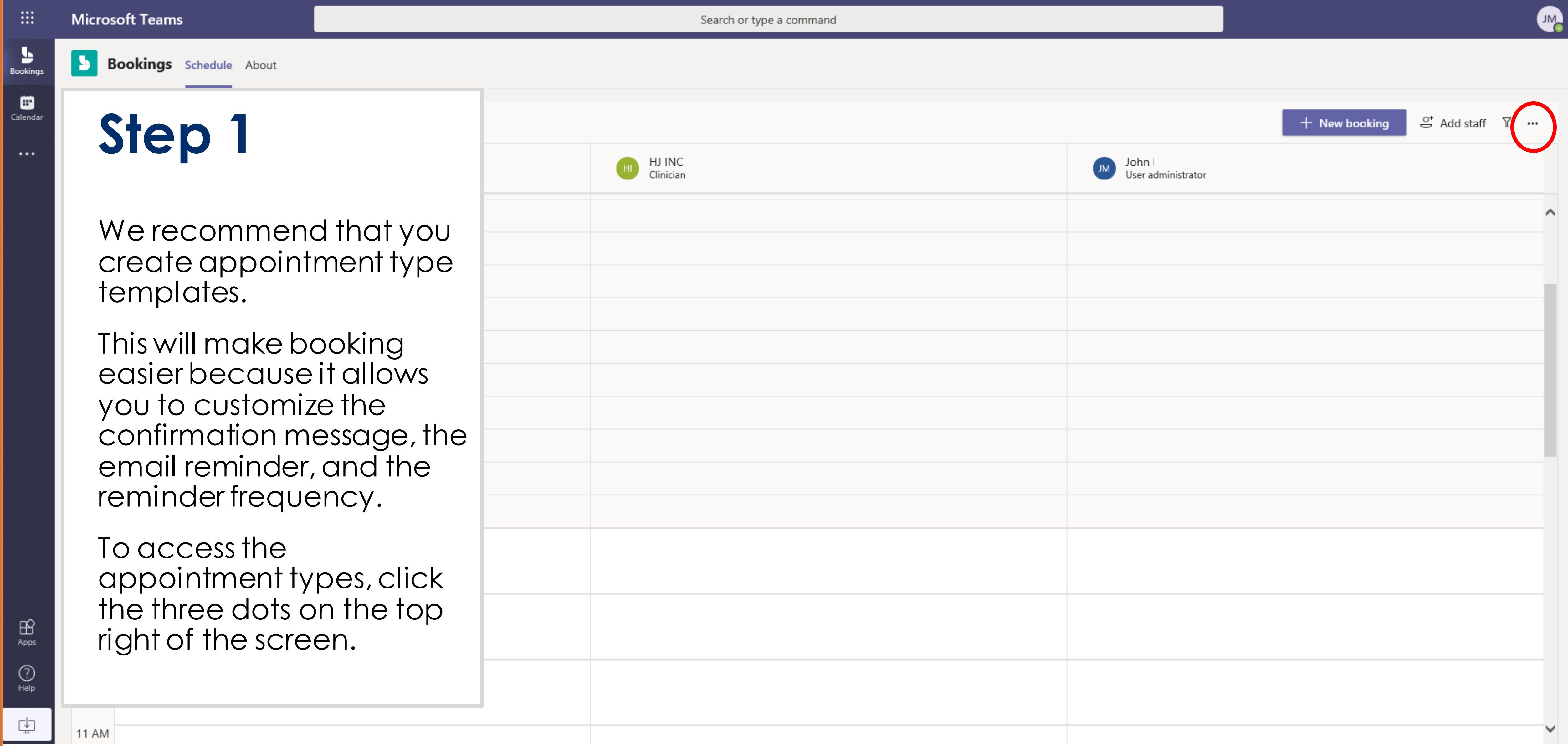
Step 15

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.



Creating Appointment Types



Step 1

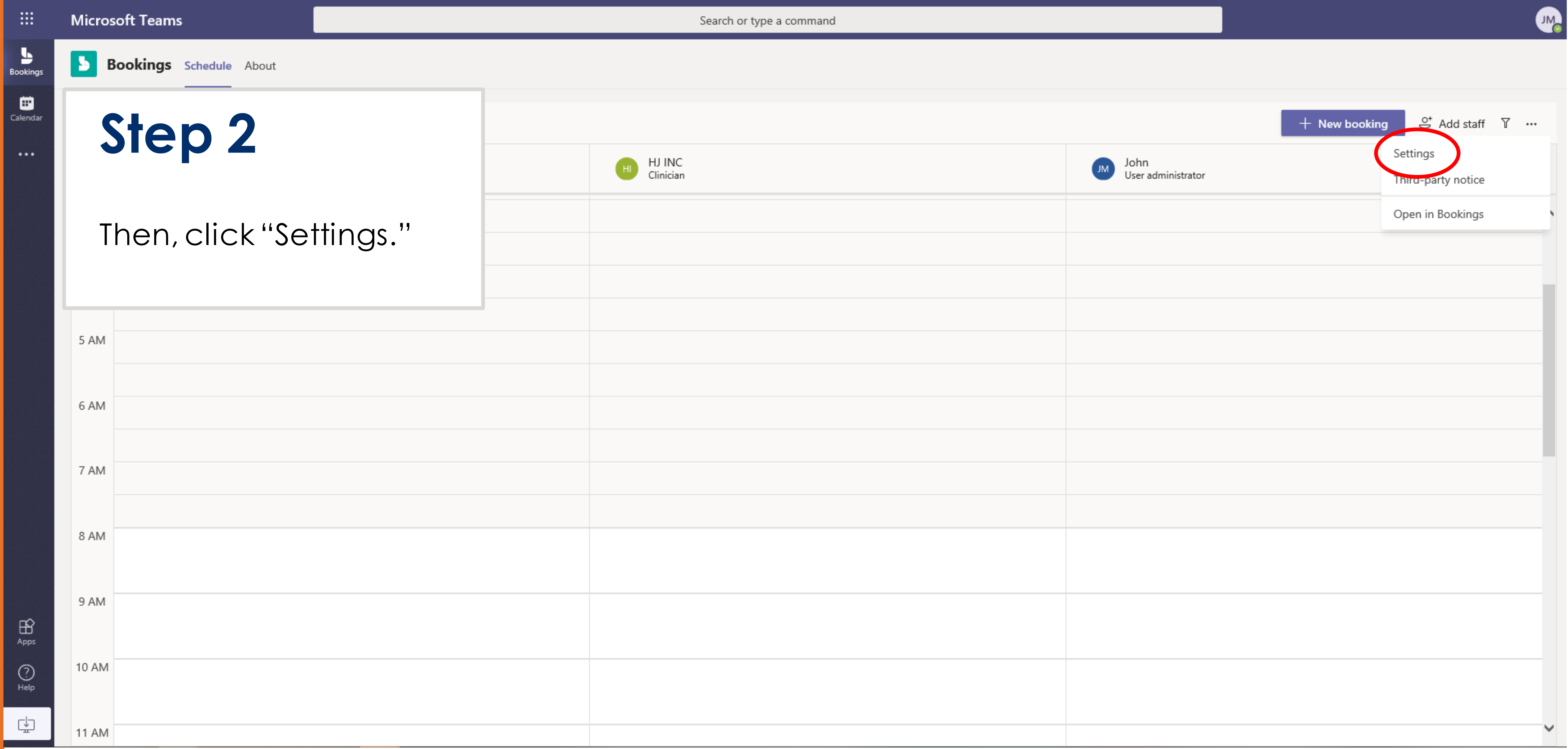
We recommend that you create appointment type templates.

This will make booking easier because it allows you to customize the confirmation message, the email reminder, and the reminder frequency.

To access the appointment types, click the three dots on the top right of the screen.

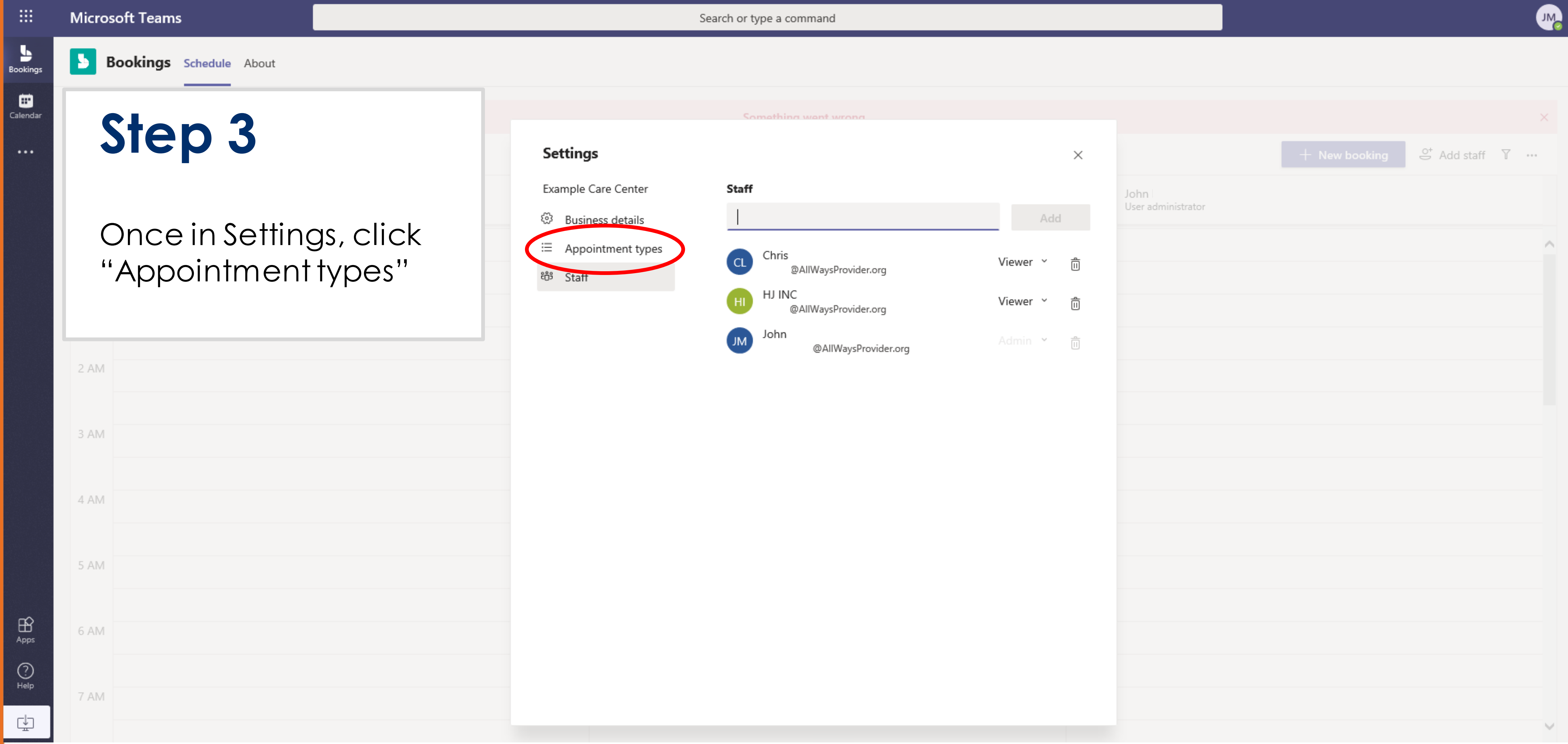
Step 2

Then, click "Settings."



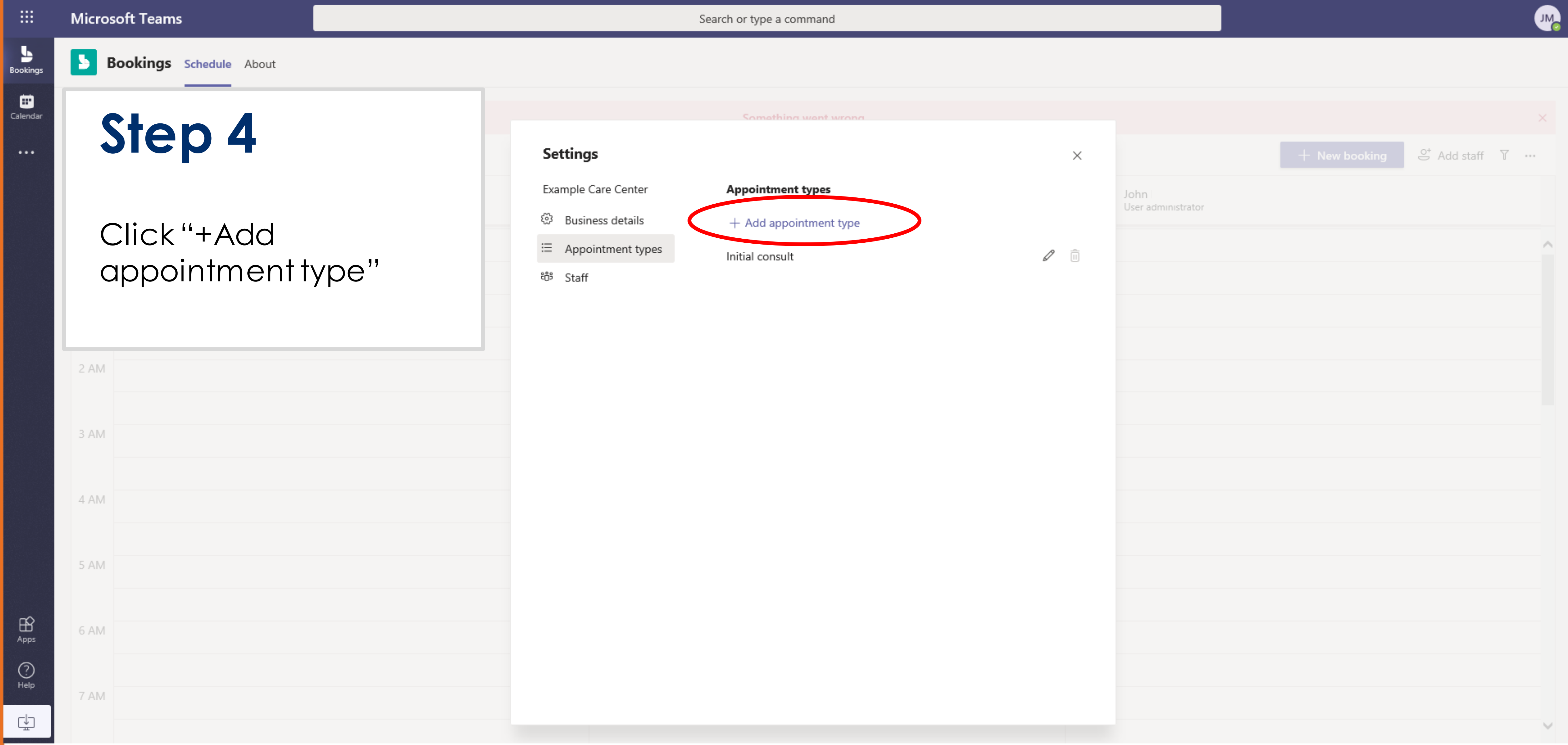
Step 3

Once in Settings, click "Appointment types"



Step 4

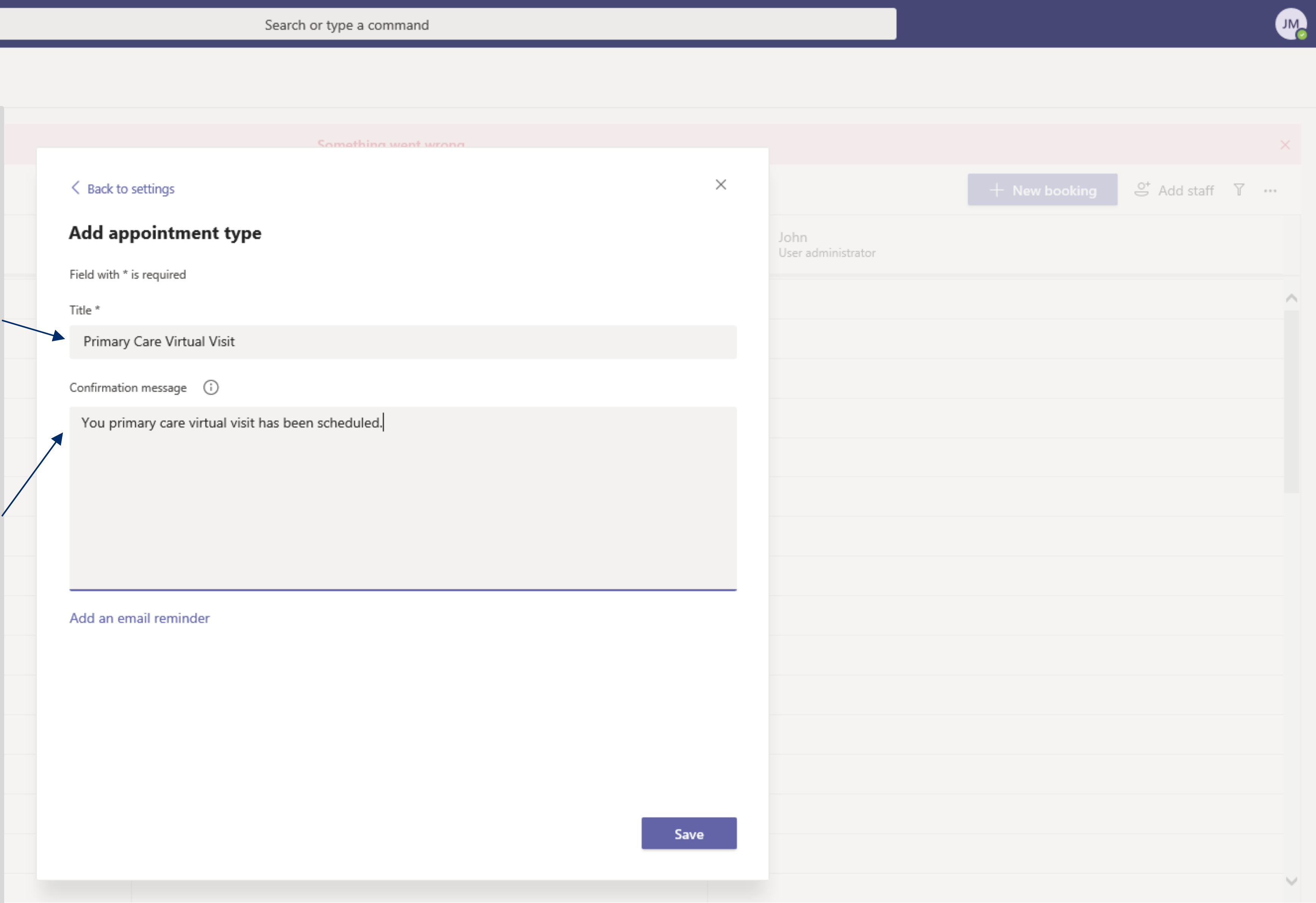
Click "+Add appointment type"



Step 5

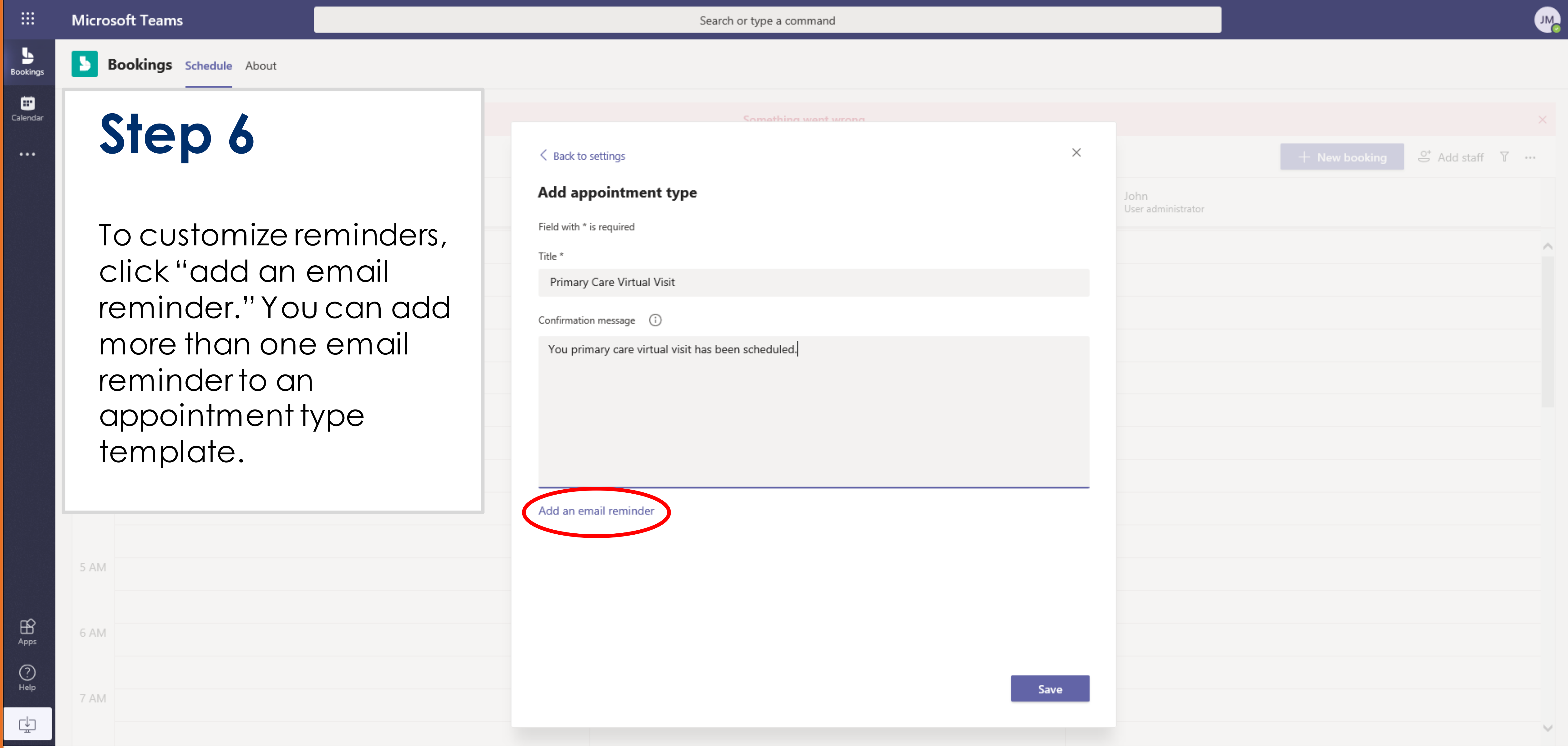
Give the appointment type template a name in the “title” field.

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



Step 6

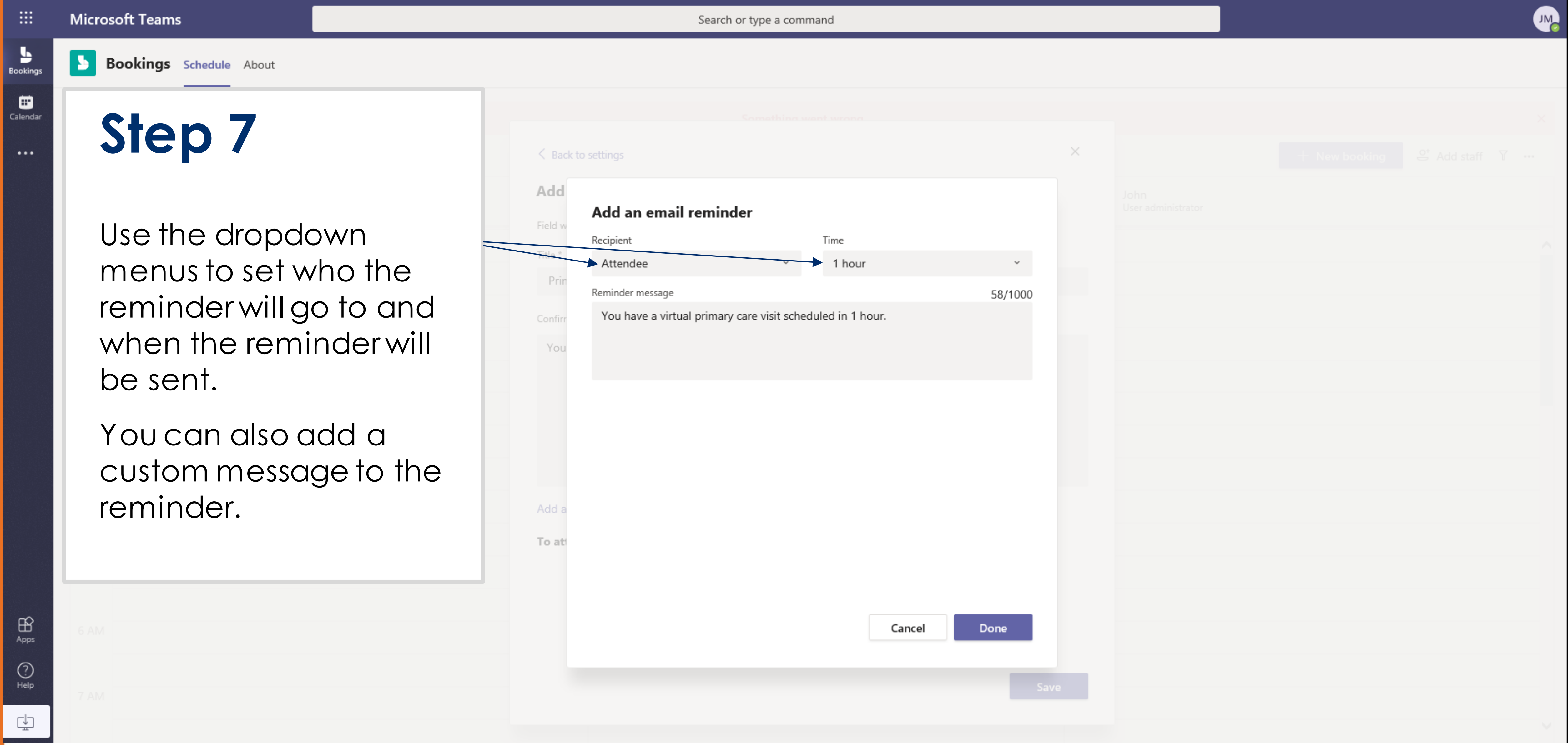
To customize reminders, click "add an email reminder." You can add more than one email reminder to an appointment type template.



Step 7

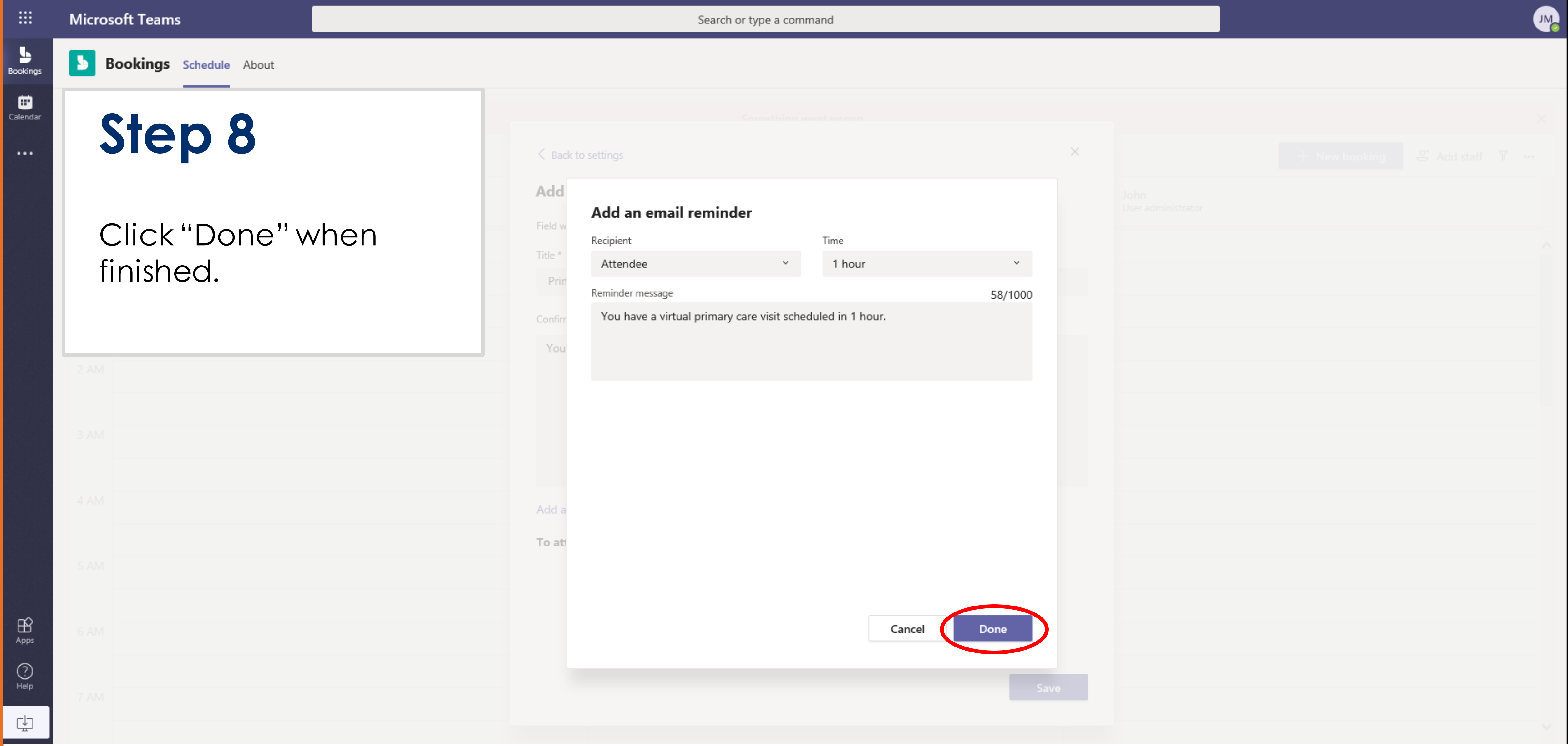
Use the dropdown menus to set who the reminder will go to and when the reminder will be sent.

You can also add a custom message to the reminder.



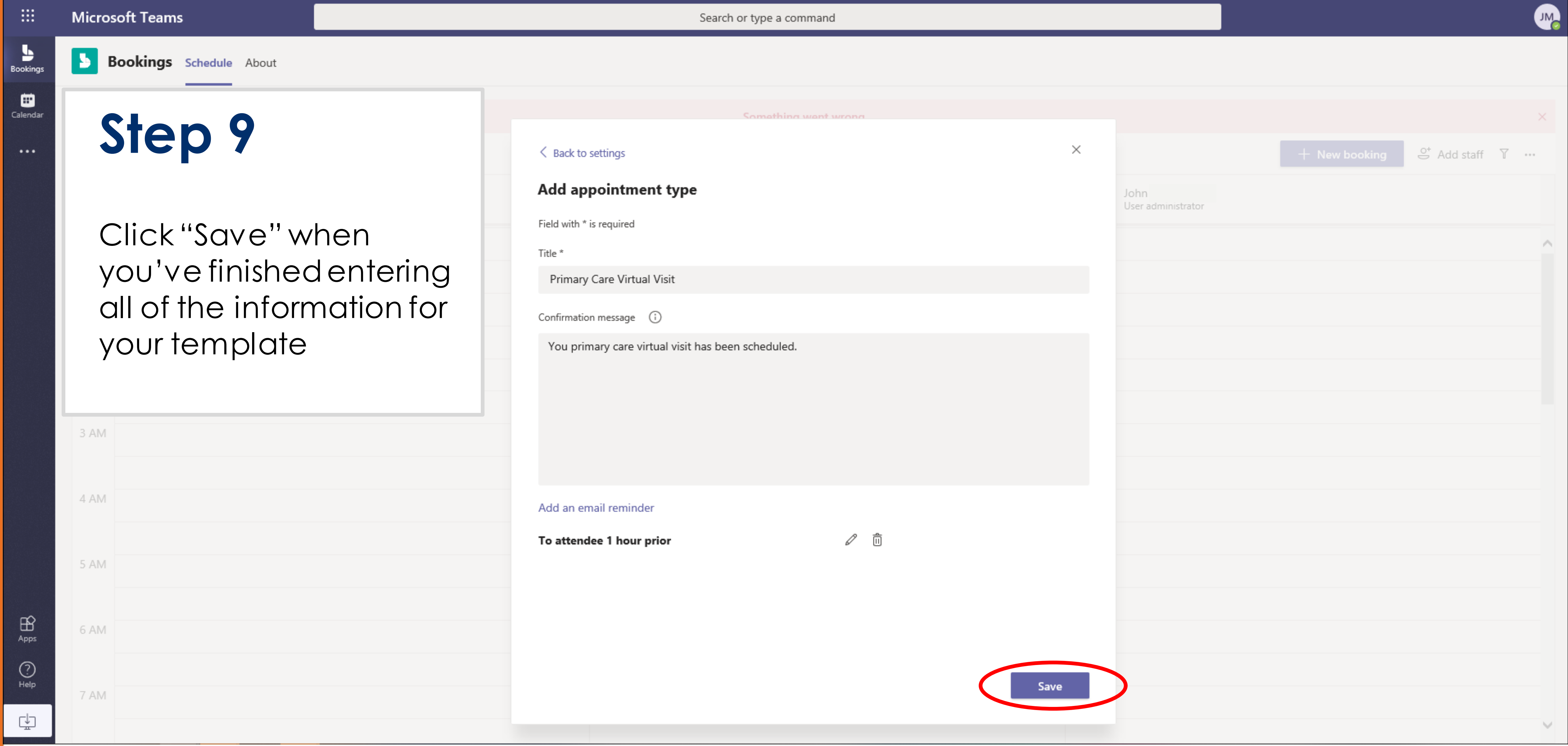
Step 8

Click "Done" when finished.



Step 9

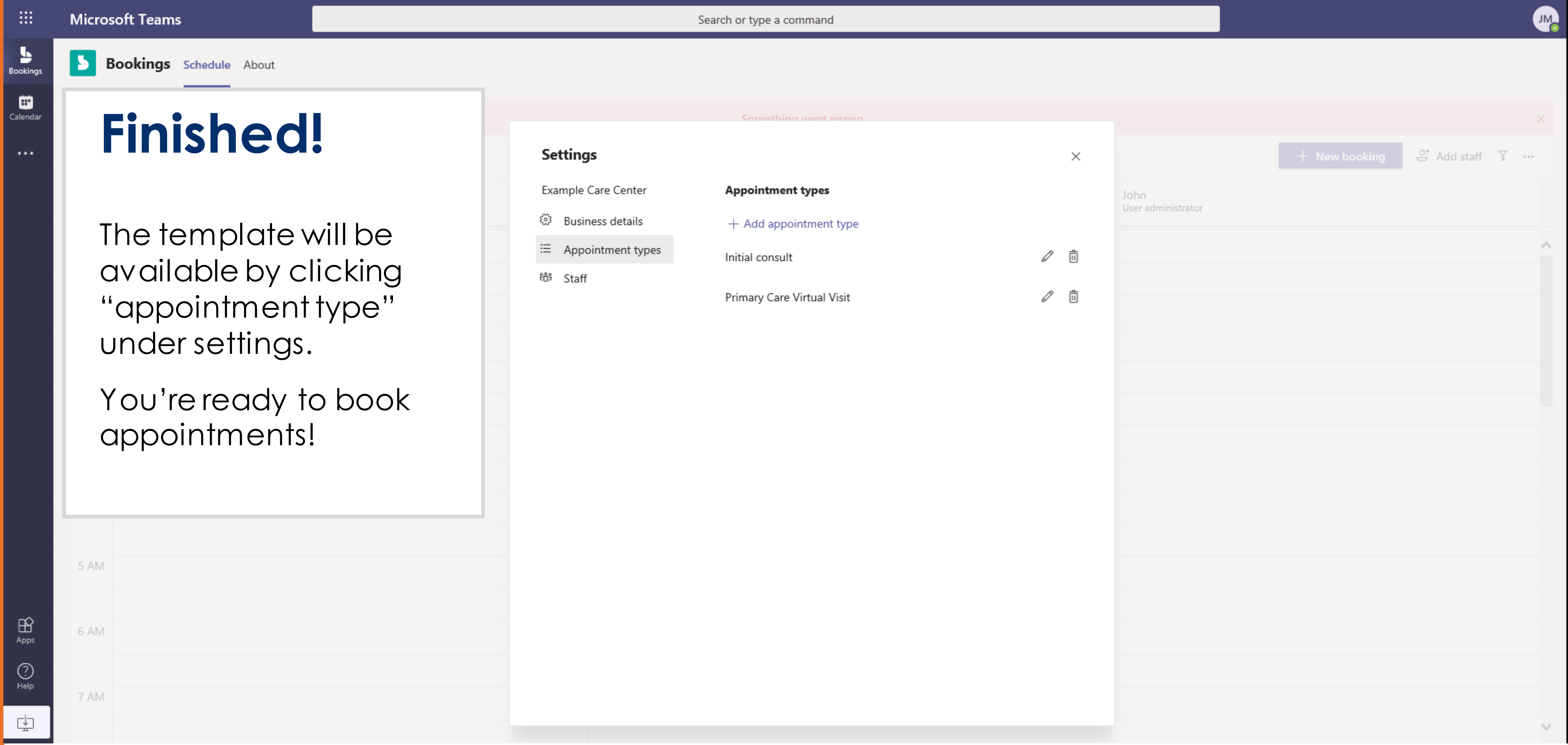
Click “Save” when you’ve finished entering all of the information for your template



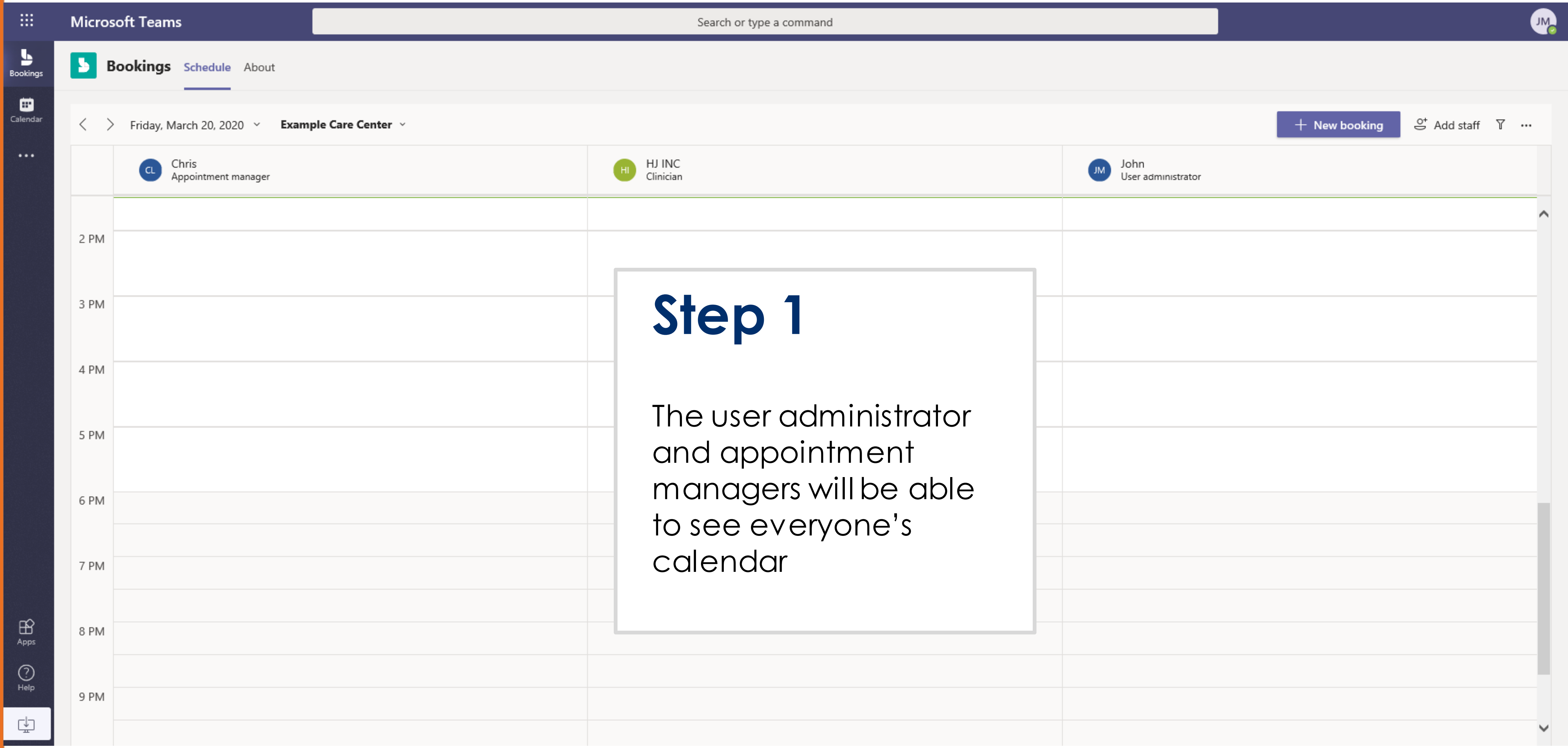
Finished!

The template will be available by clicking "appointment type" under settings.

You're ready to book appointments!

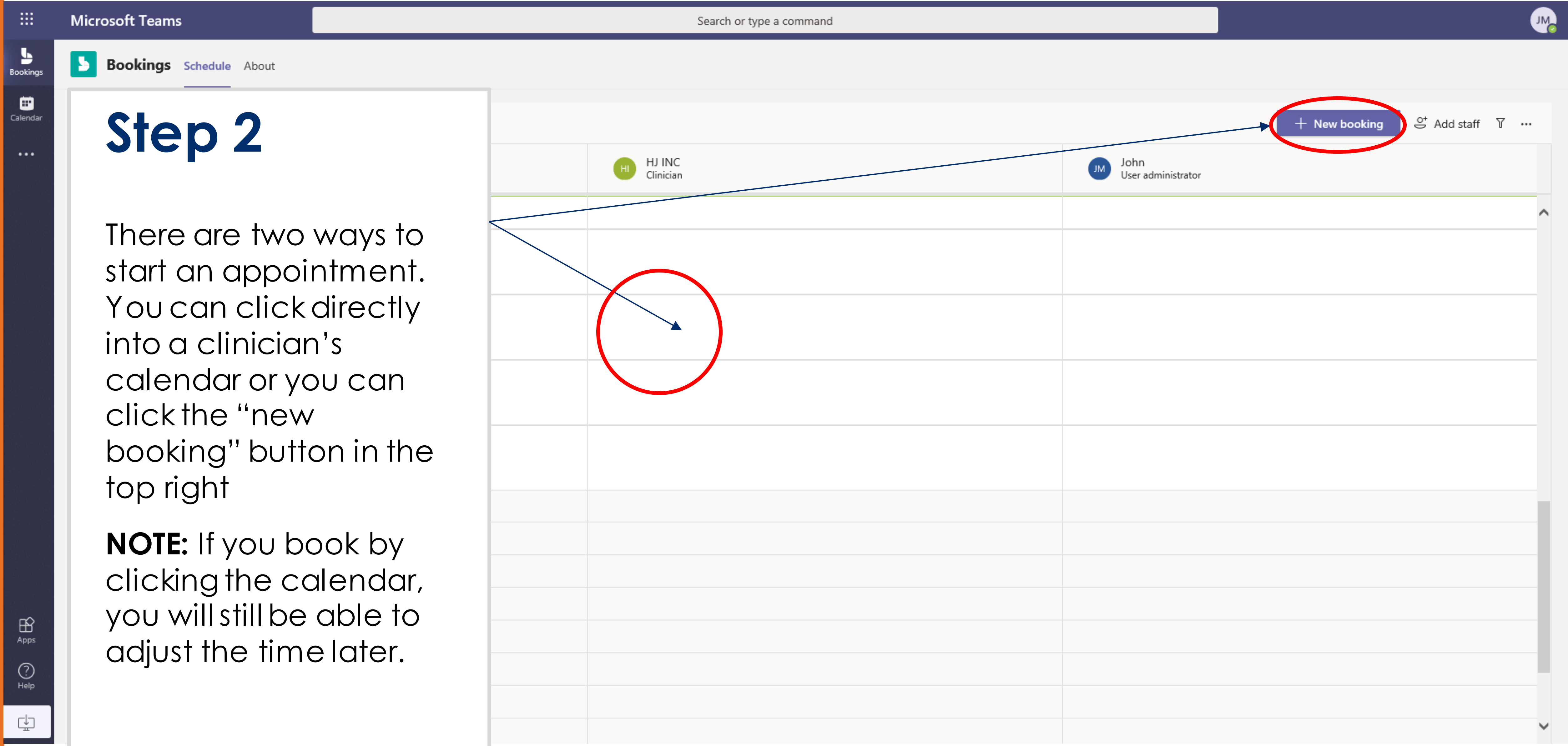


Booking an appointment



Step 1

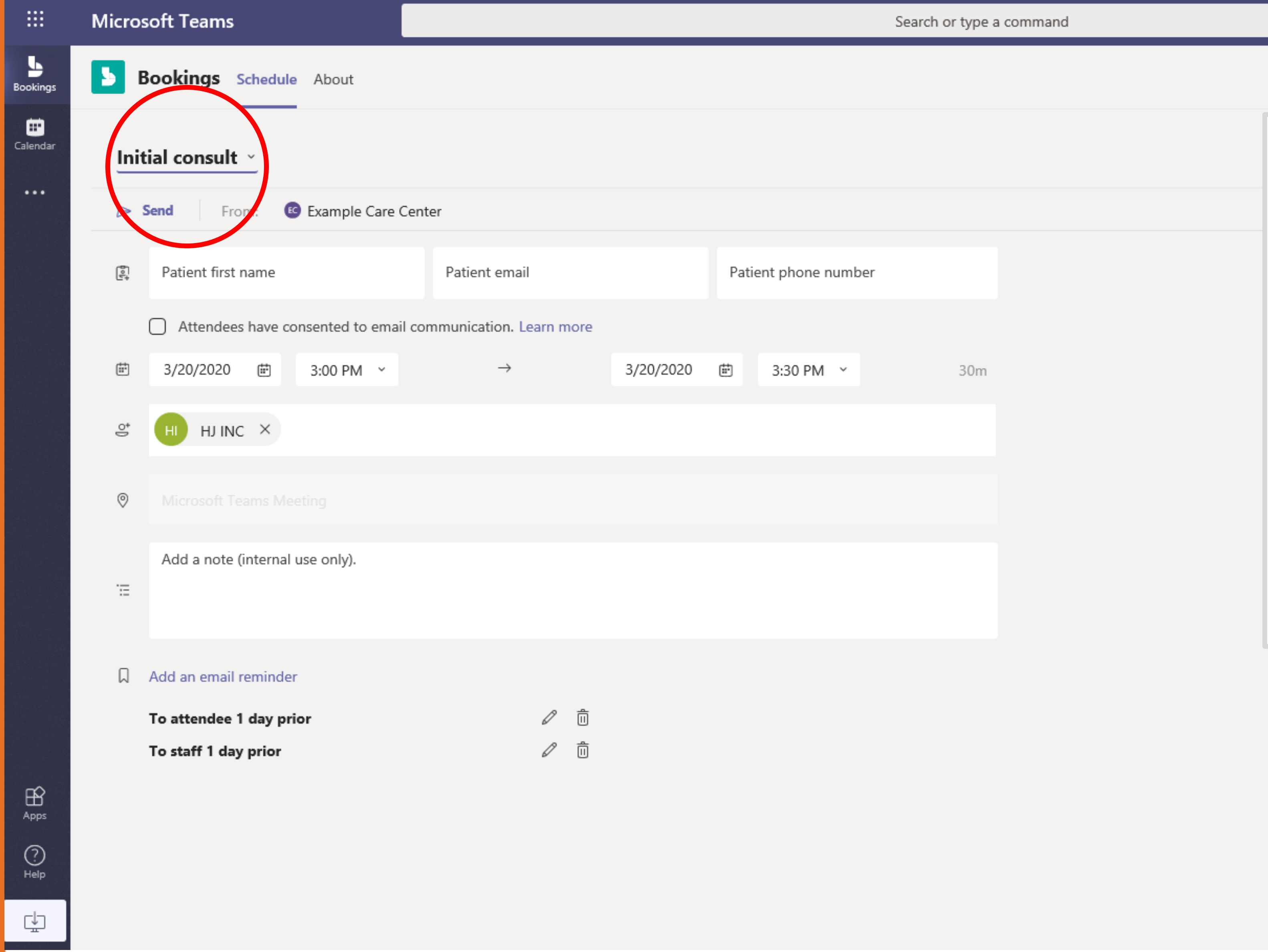
The user administrator and appointment managers will be able to see everyone's calendar



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

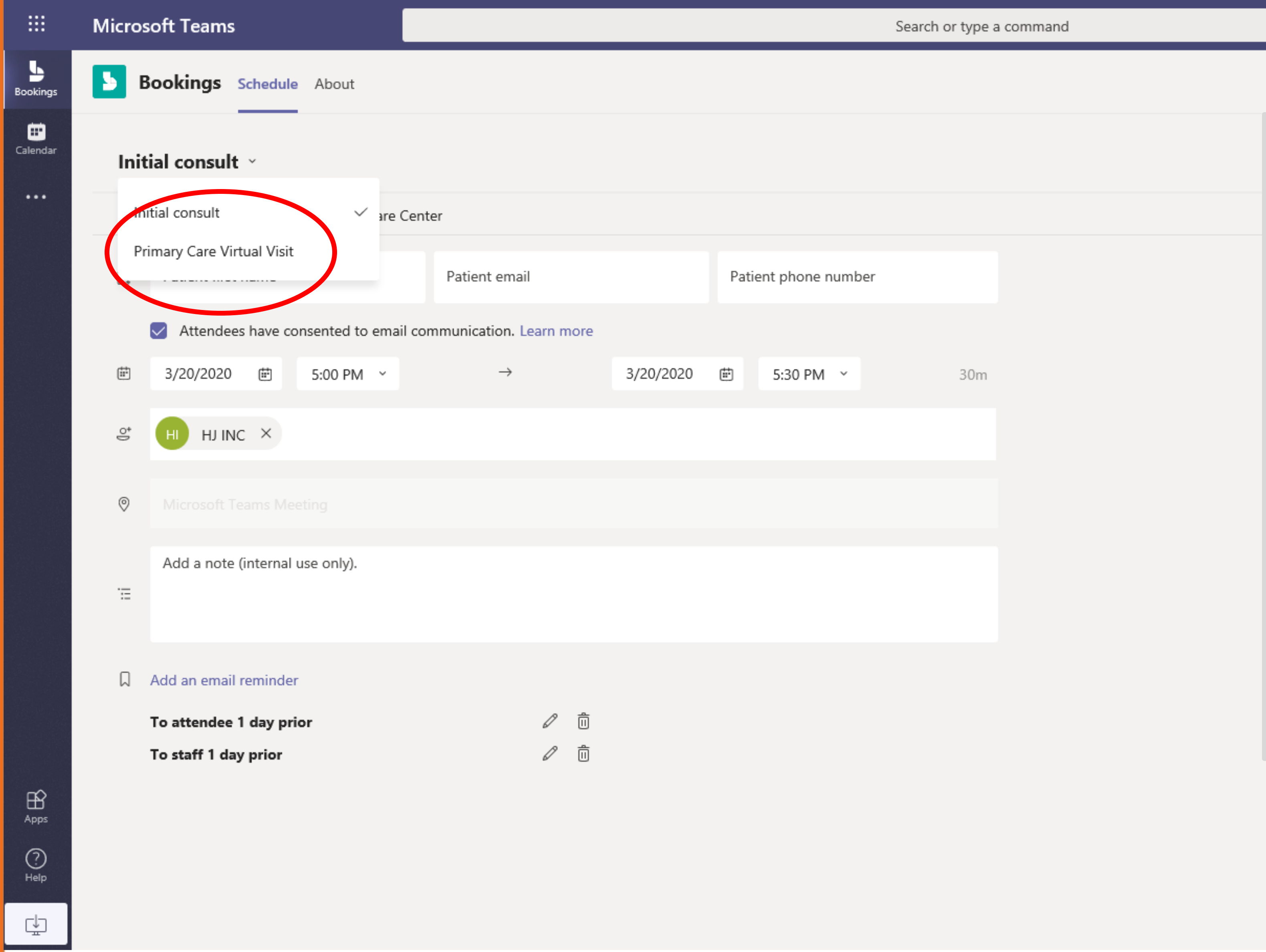
NOTE: If you book by clicking the calendar, you will still be able to adjust the time later.



Step 3

This is the screen to create an appointment.

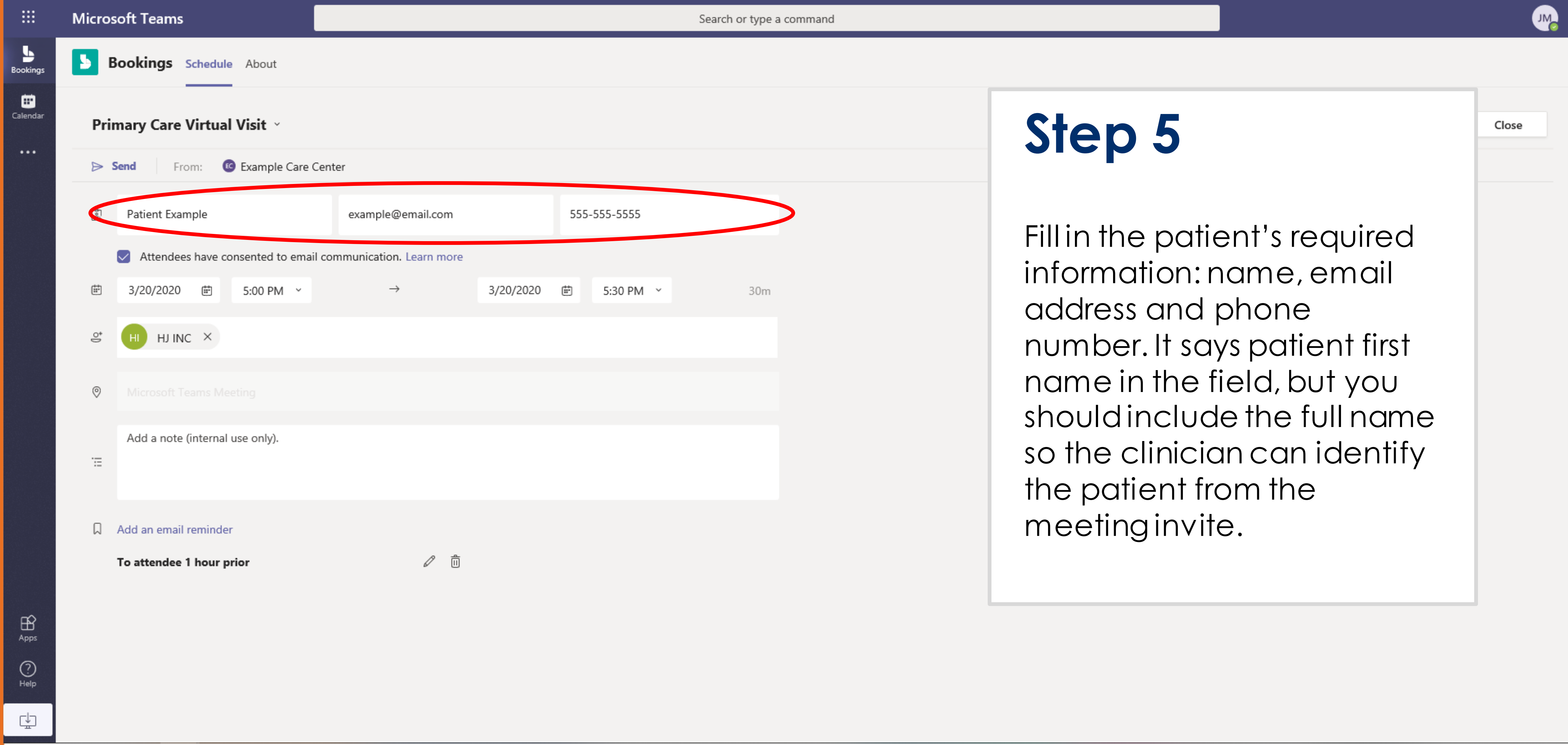
Click the appointment type in the upper left.



Step 4

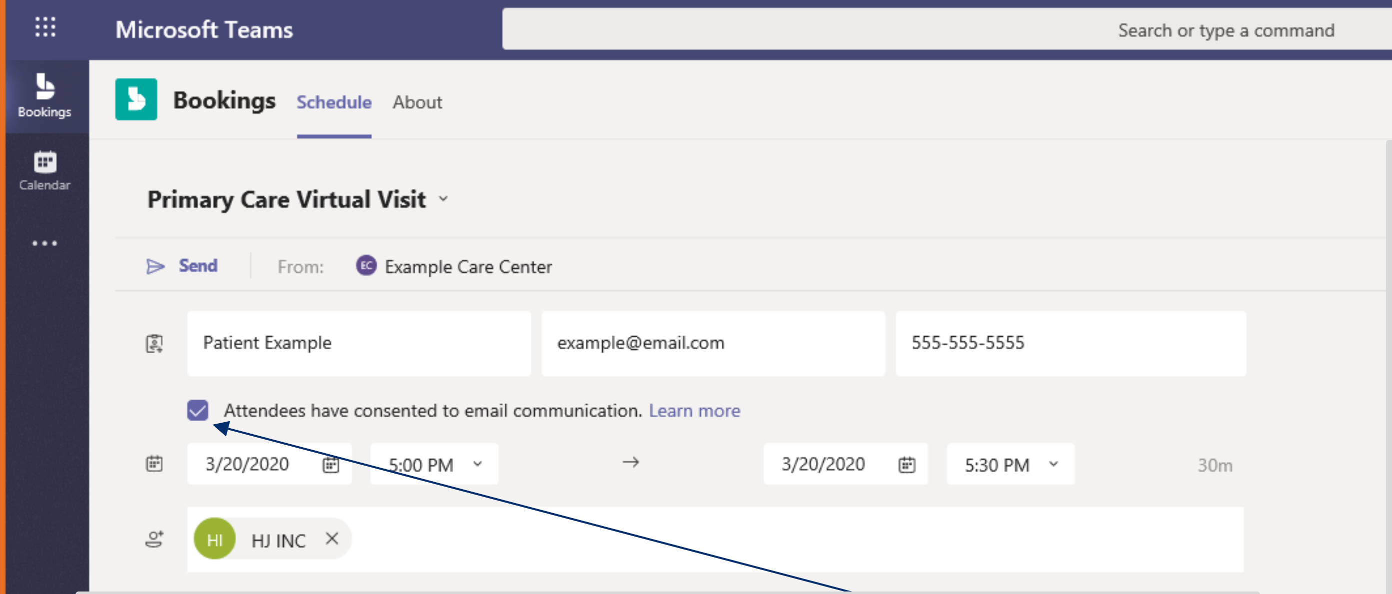
Use the dropdown menu to select one of the appointment type templates you have already created.

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 should include the full name so the clinician can identify the patient from the meeting invite.



Full privacy and security statement:

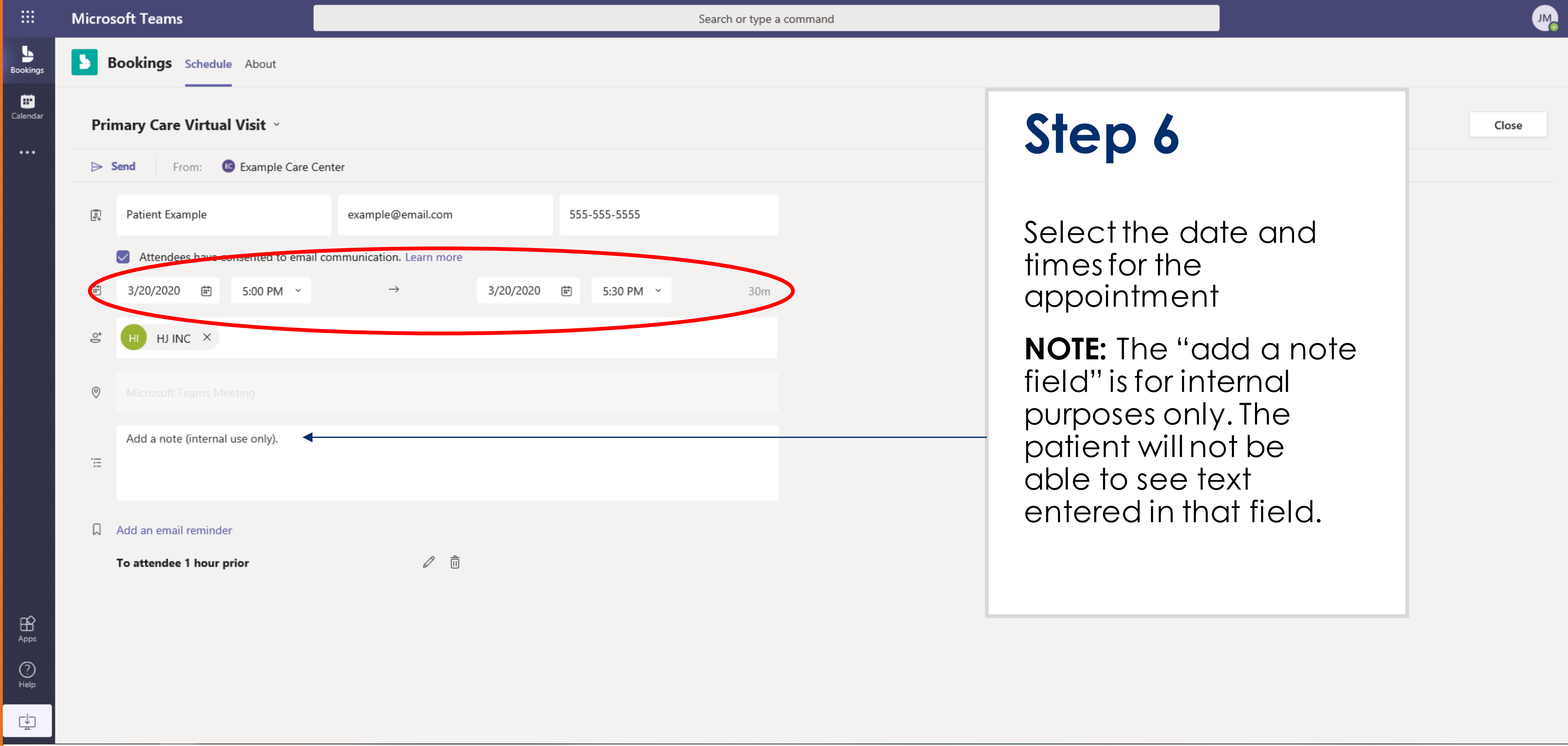
By using this app, you are confirming that you are complying with regulations and laws applicable to the use of unencrypted e-mail for communications between healthcare providers and patients, including any safeguards and consents required to protect attendee privacy, such as limiting the amount or type 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.

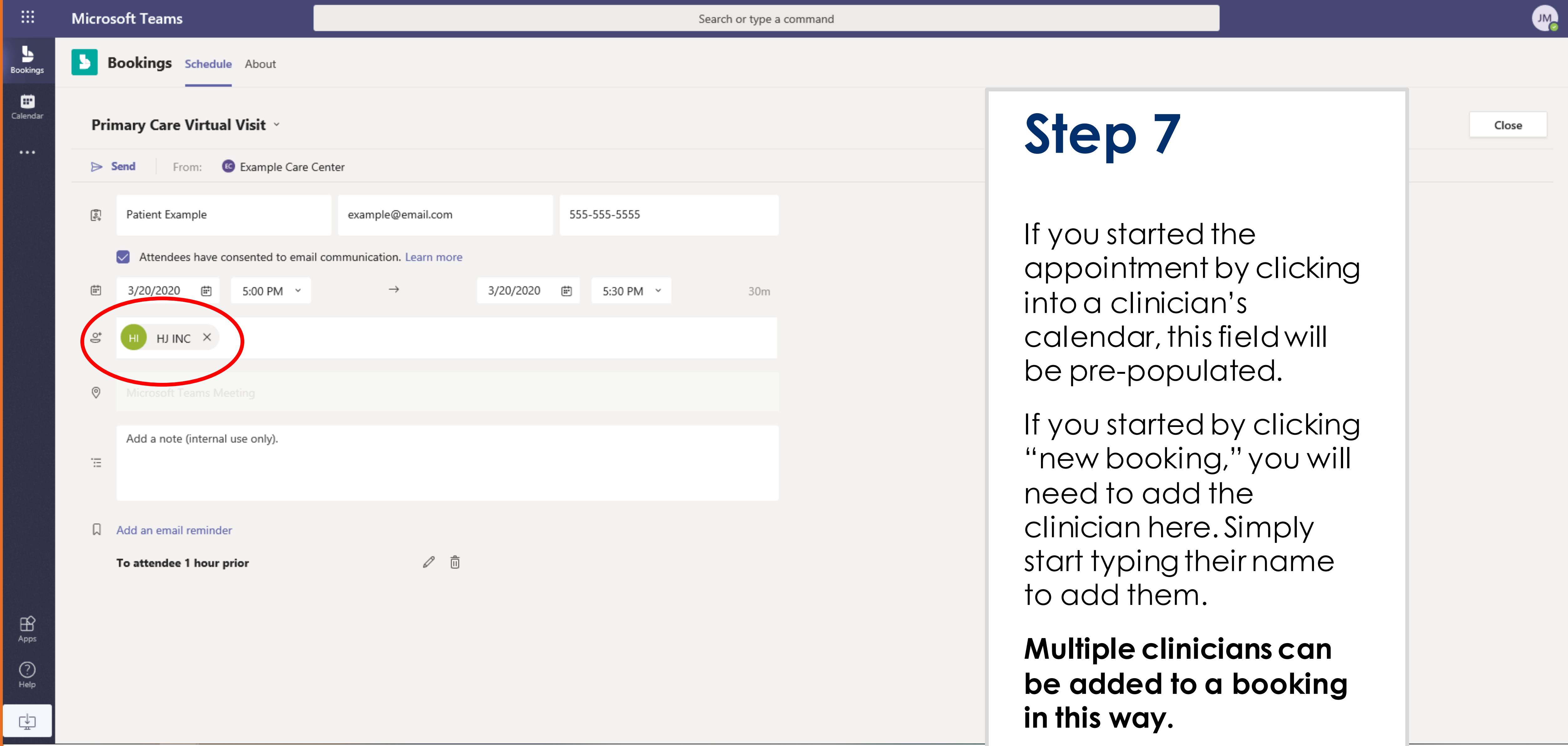
Please note that the only three pieces of information we store are the patient name, phone number, and email address as they are entered into the appointment invitation.



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.

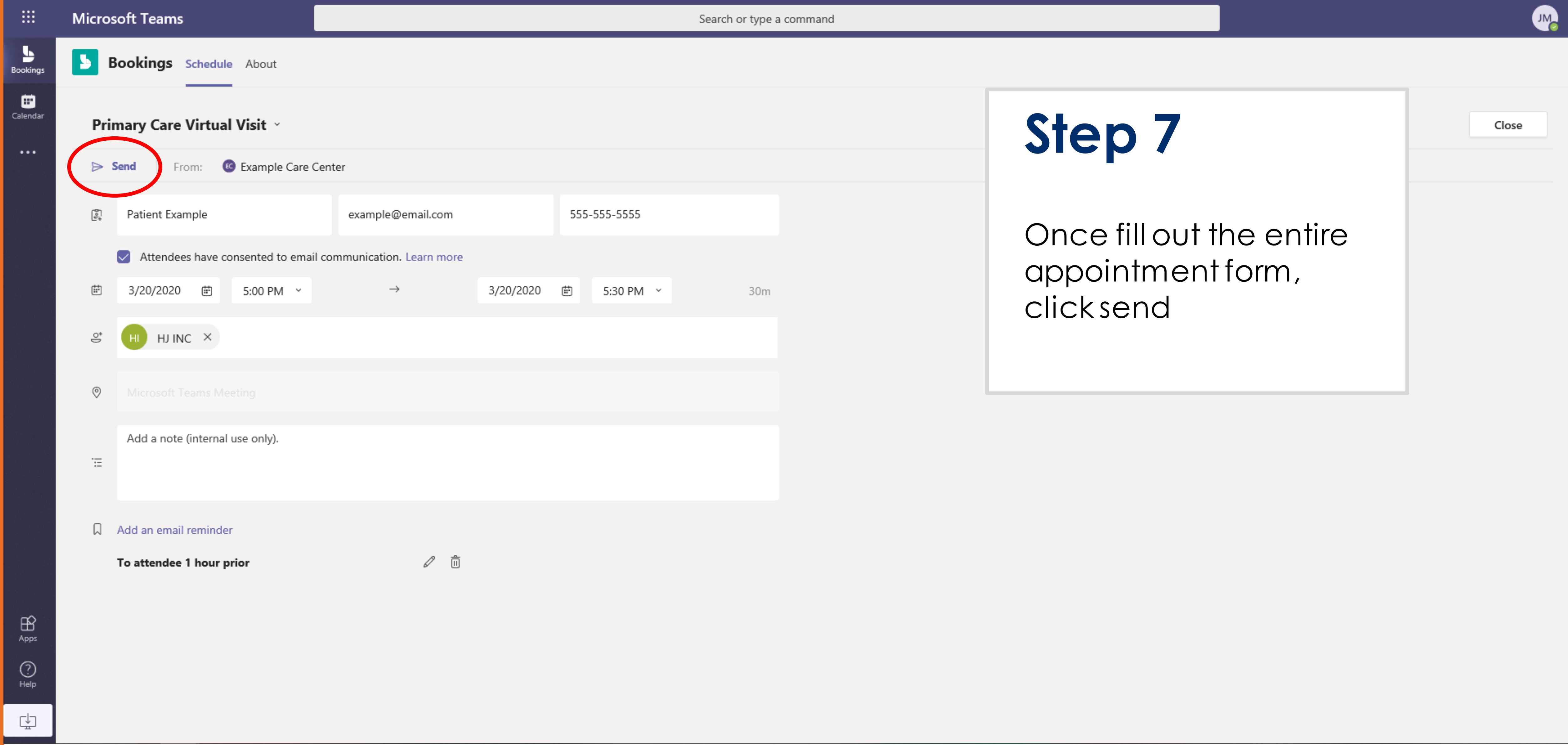


Step 7

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

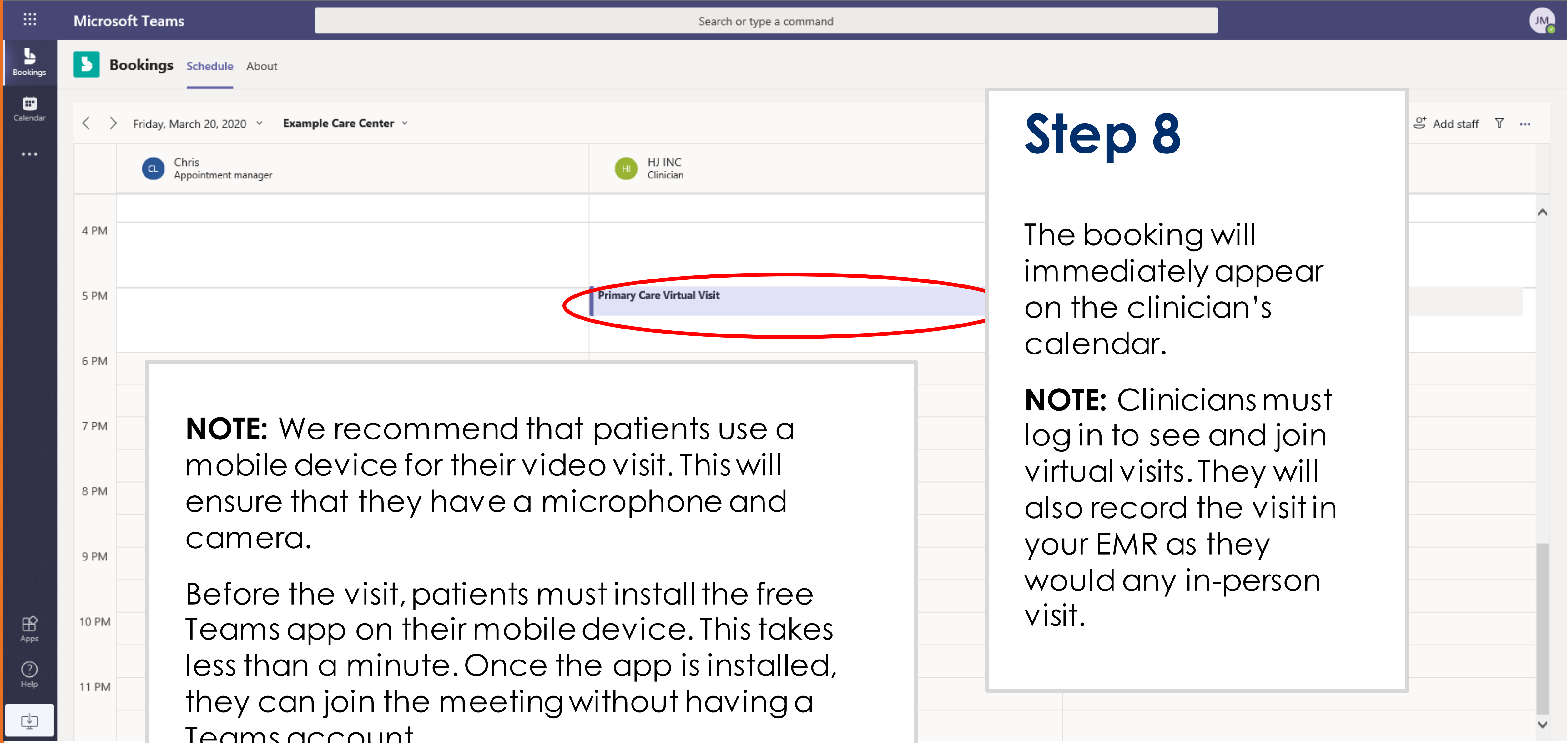
If you started by clicking "new booking," you will need to add the clinician here. Simply start typing their name to add them.

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.

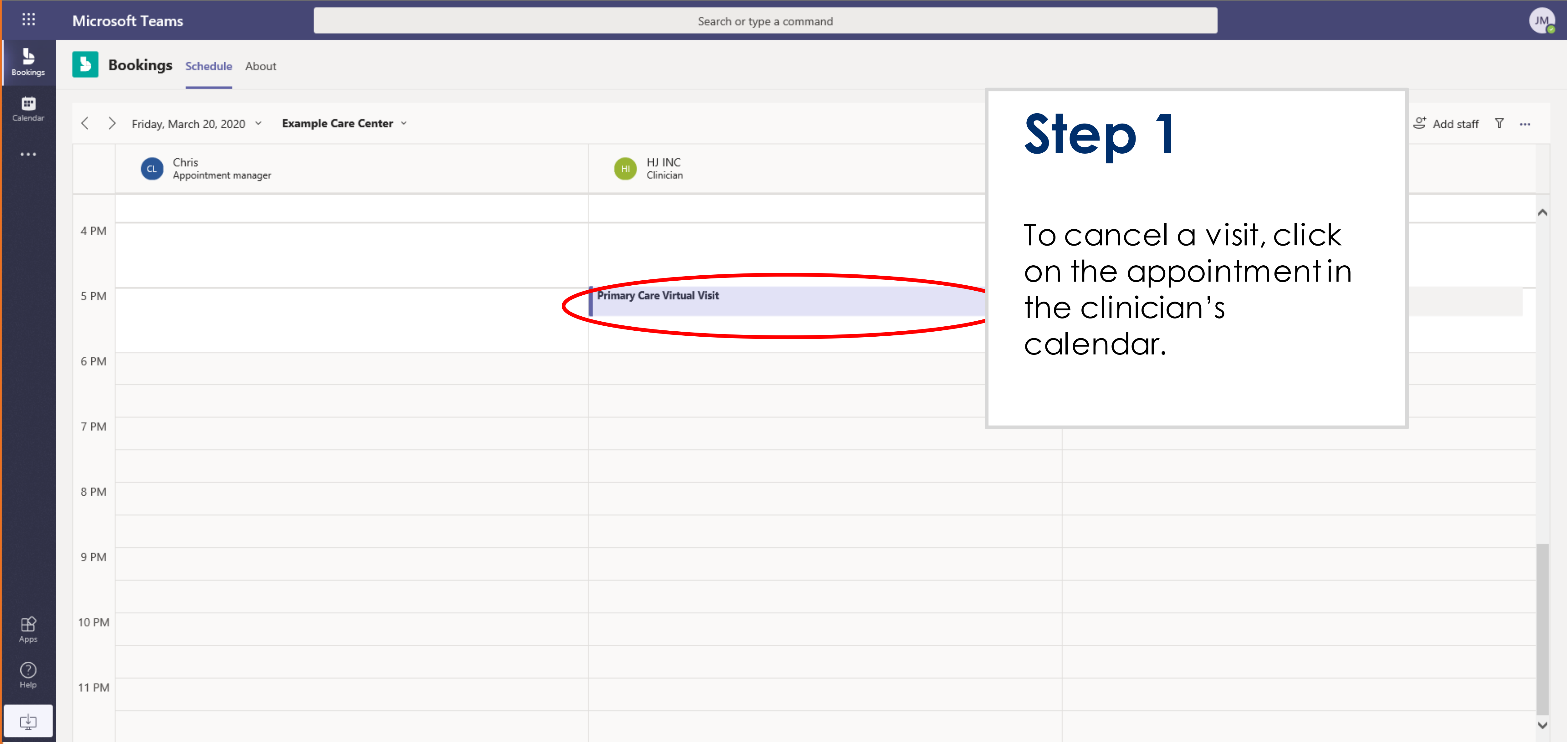
NOTE: Clinicians must log in to see and join virtual visits. They will also record the visit in your EMR as they would any in-person visit.

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.

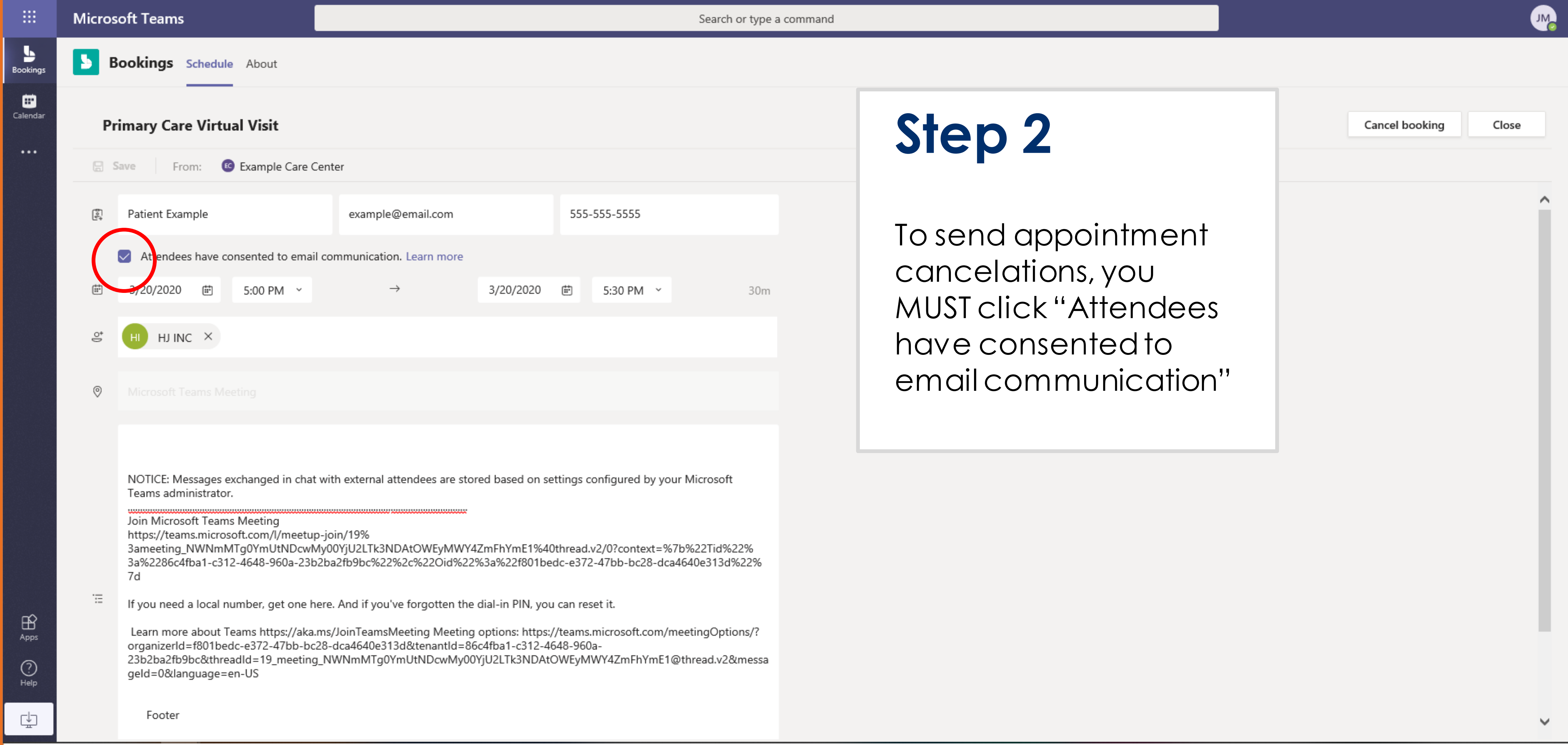
Please see detailed steps in the Patient Quick Start Guide.

Cancelling an appointment



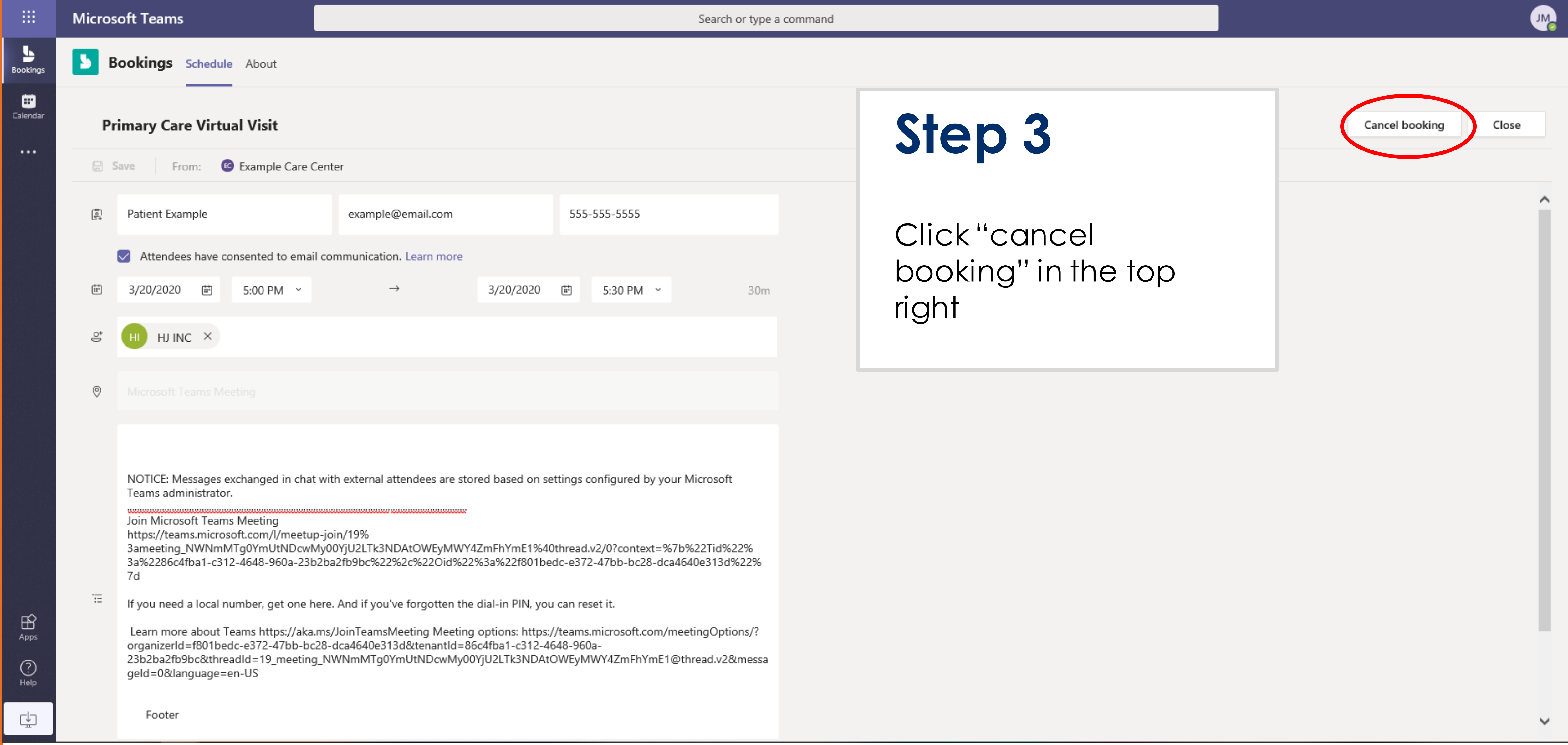
Step 1

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



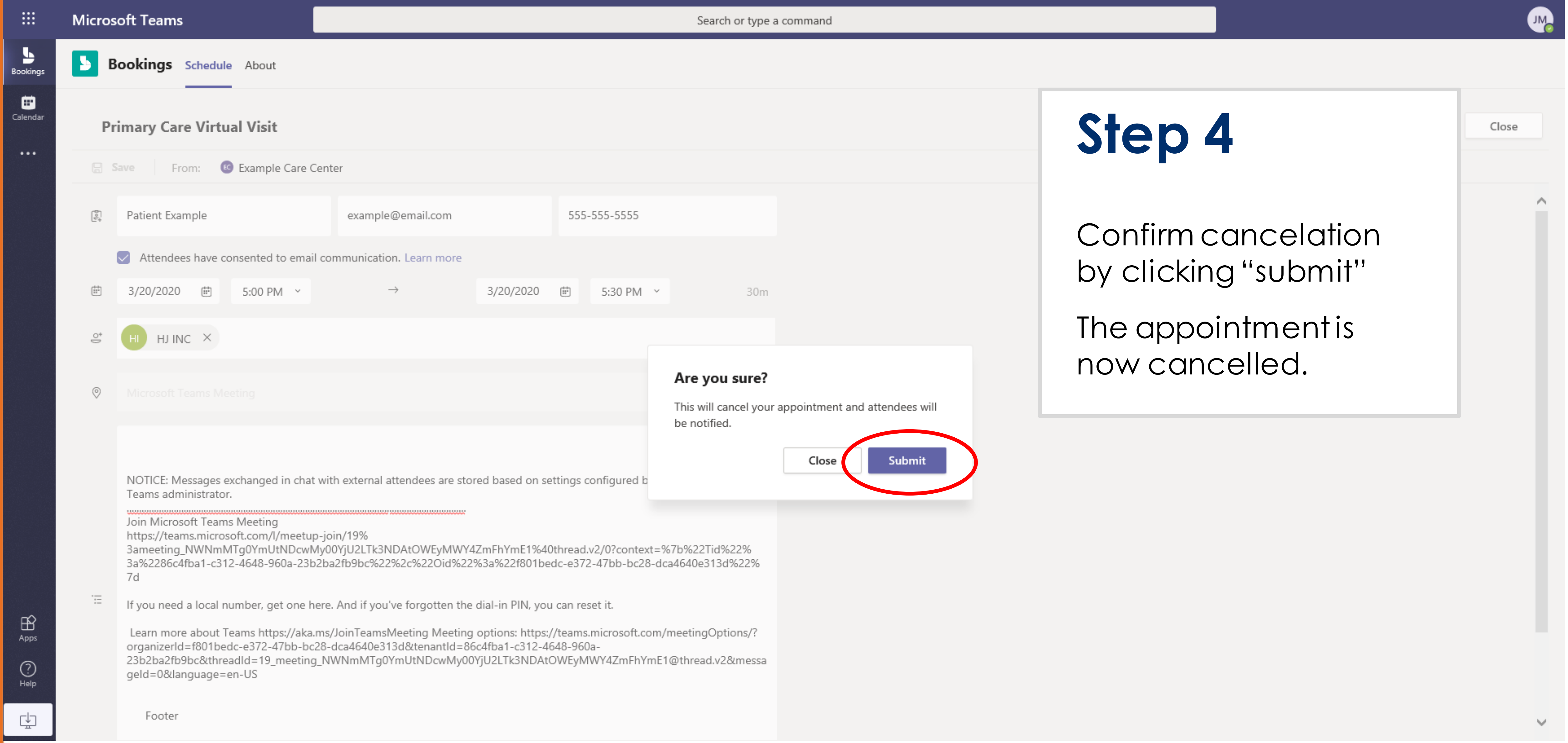
Step 2

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.