



## MS Teams Telehealth Setup Instructions

### Definitions

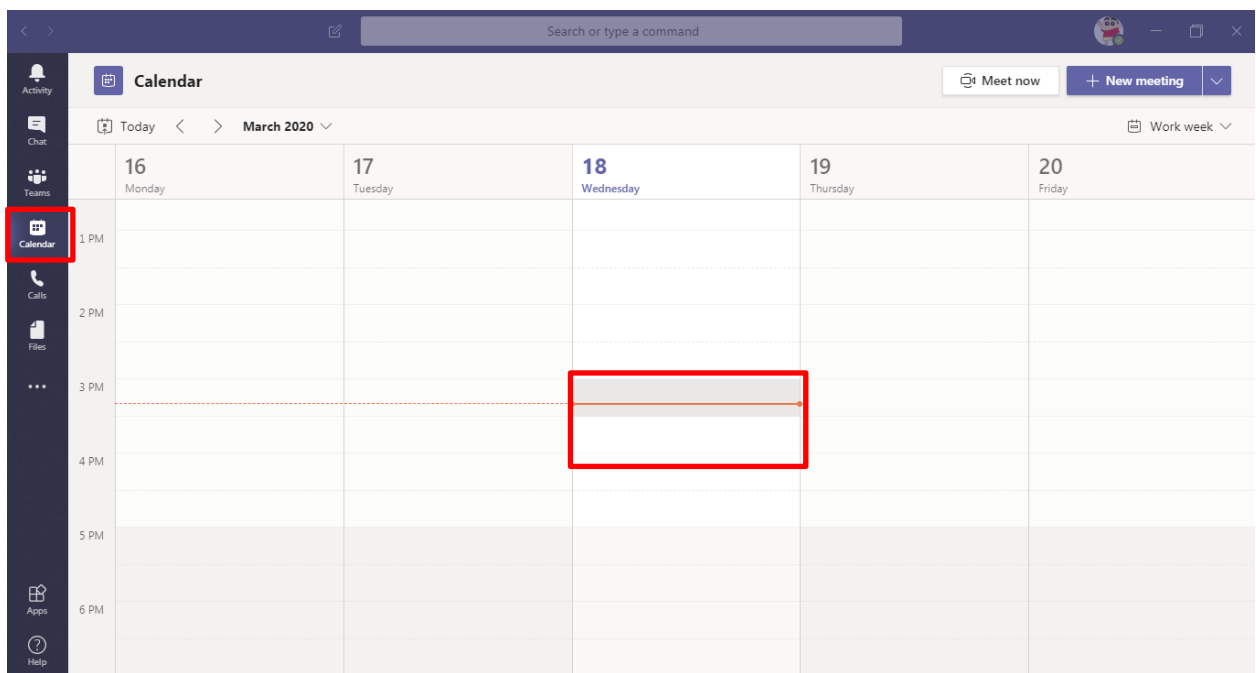
**Patient Support Person (PSP)**- A person (typically a parent/guardian) who assists with intervention and emergencies.

**Distance site**- The site where the behavior analyst/case supervisor is located while engaging in telehealth communications.

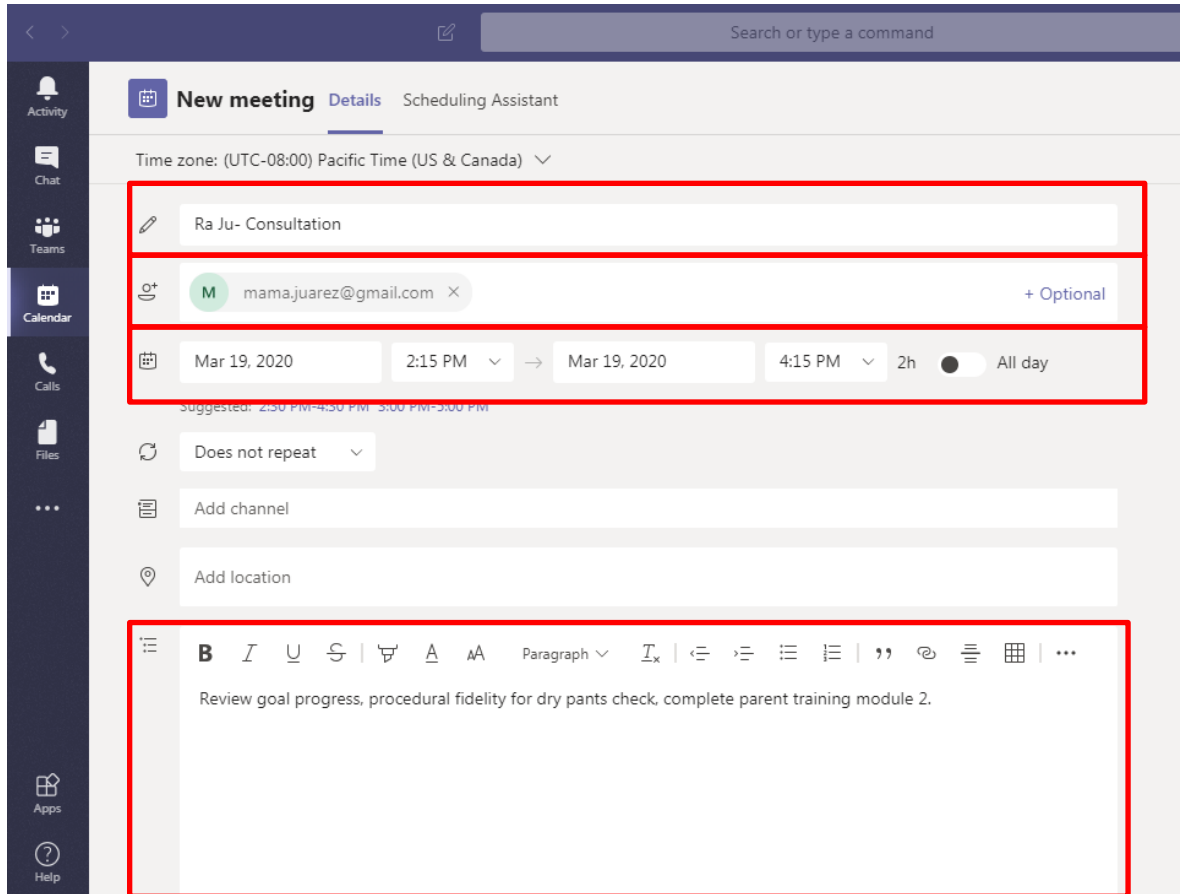
**Origination site**- The site where the patient/client is located while engaging in telehealth communications.

### Setting Teleconference Appointment (Out-of-network Recipients)

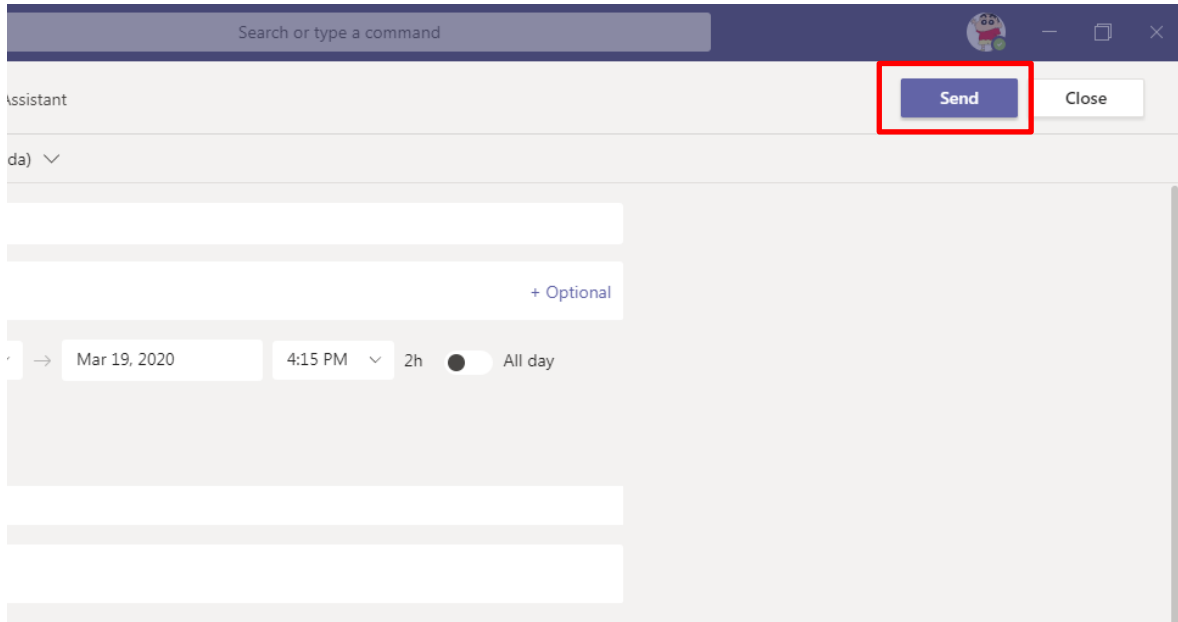
1. From the MS Teams, click on the calendar icon on the left and once in the calendar view, click on the date and time of your desired appointment.



2. Use the client's first two letters of their first and last name and "Consultation" as the title (e.g., "Ra Ju- Consultation"), input the PSP's email address (ensure accuracy), input meeting date and time, input summary of appointment agenda.



3. Double check all information for accuracy and click send on the upper right.

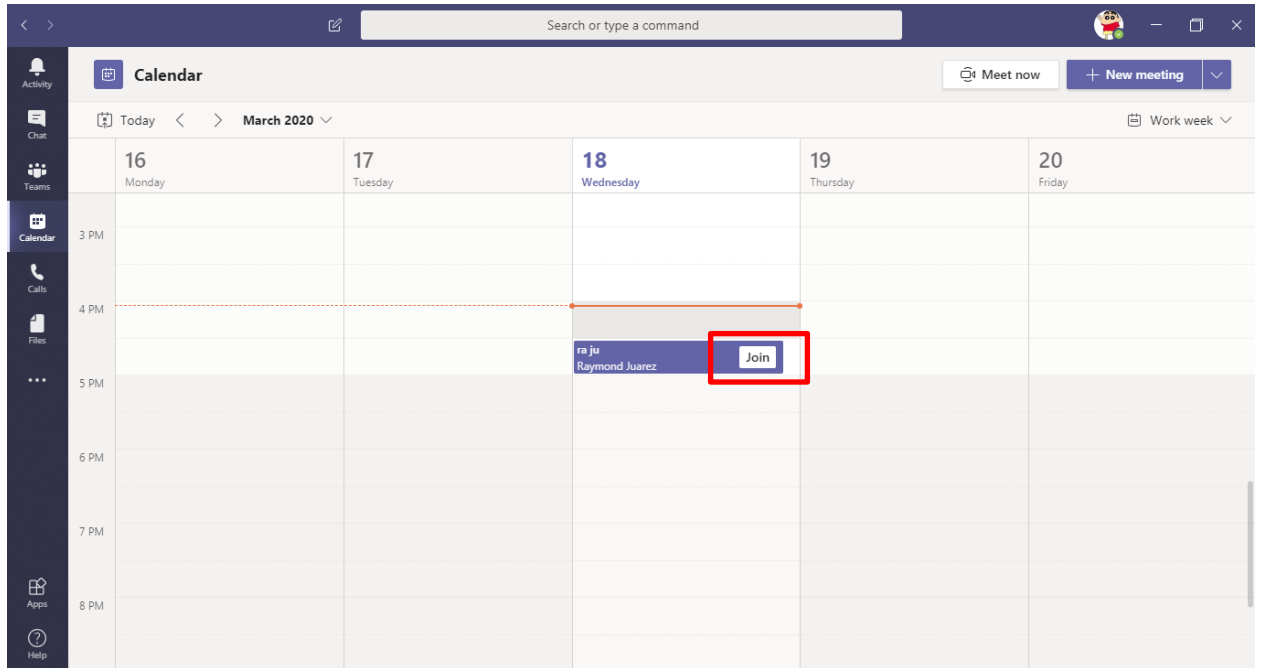


4. Confirm, in person or via phone call/text, the PSP received the email invitation.

### **Joining Video Meeting**

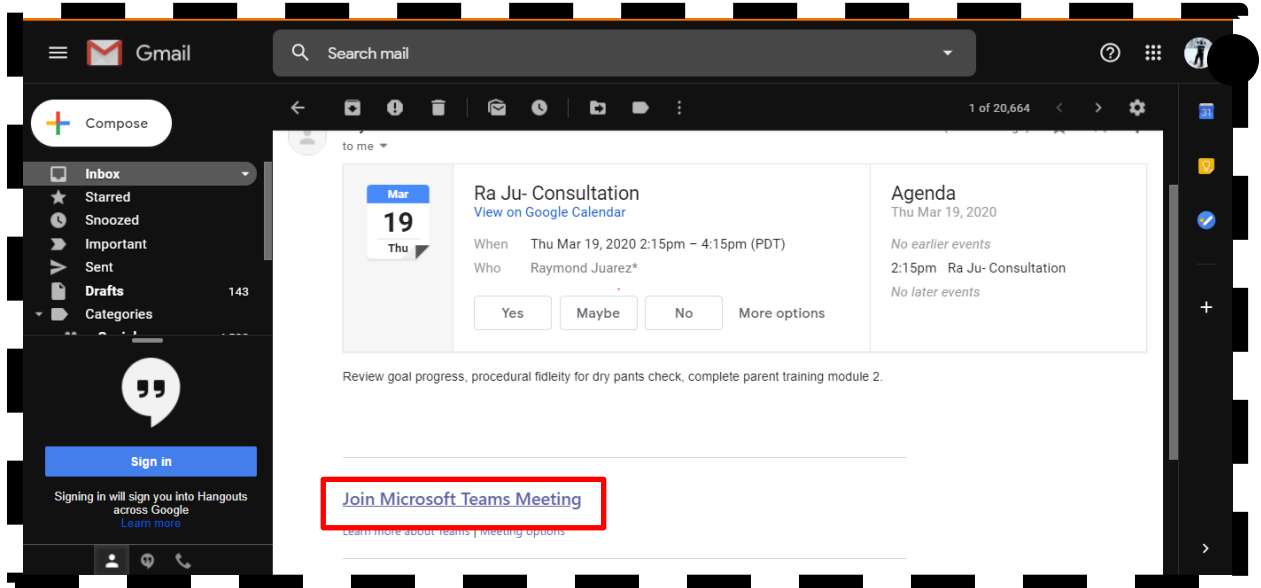
*Note: PSP steps are indicated with "(PSP)" and PSP view of the corresponding steps are in a dashed border*

1. Five minutes prior to your appointment, click on the "Join" button on the corresponding appointment from your calendar view on MS Teams.

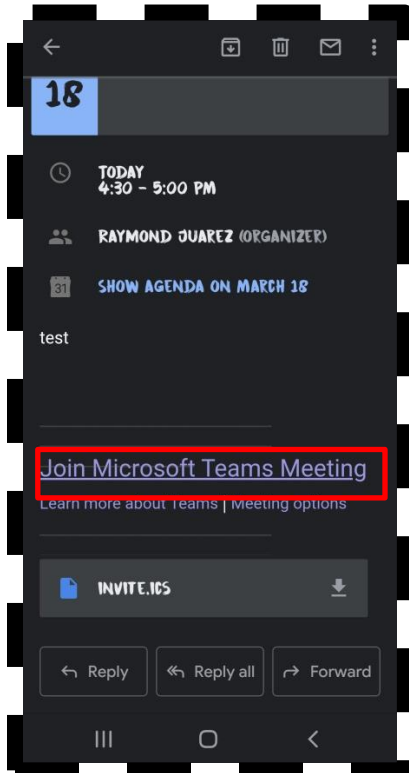


2. (PSP) Instruct PSP to open the appointment email, scroll down and click “Join Microsoft Teams Meeting”

(Computer view)



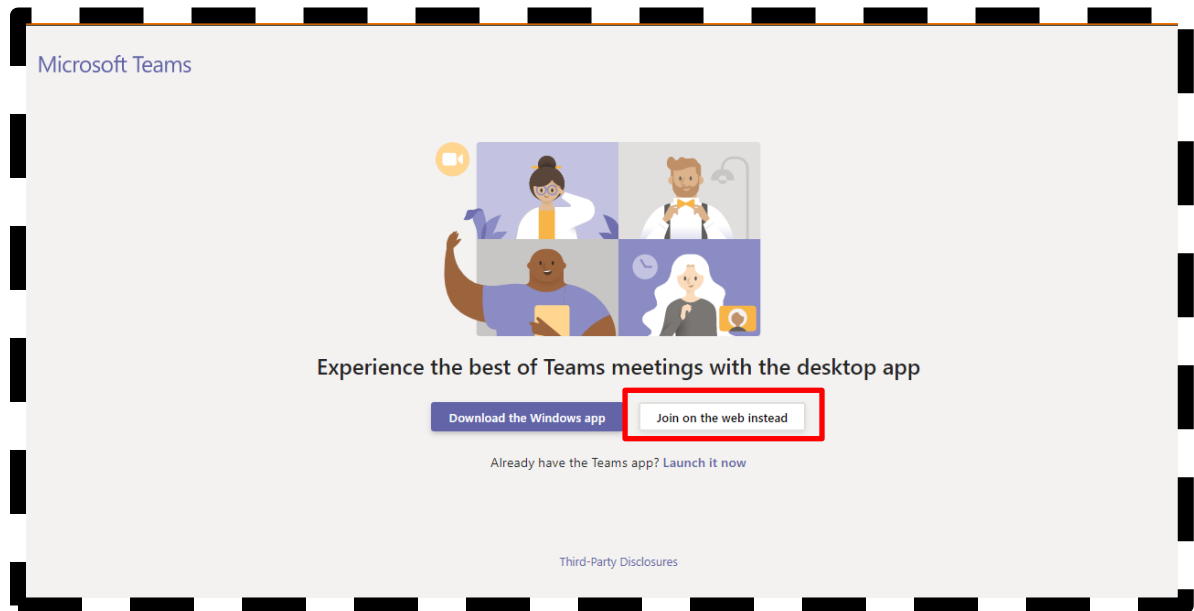
(Phone View)



3. (PSP) If PSP is using a computer, instruct them to select “Join on the web instead” button from their web browser

*Note: MS Teams browser mode is currently not supported by Firefox*

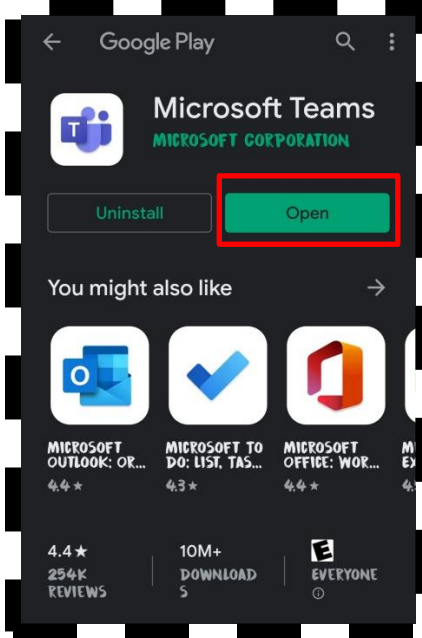
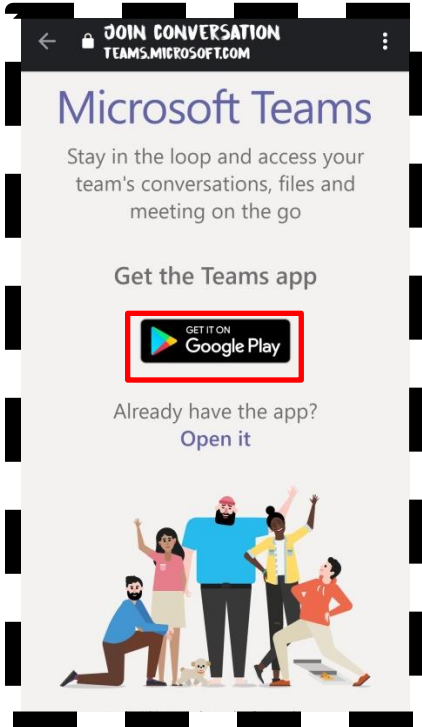
(Computer view)

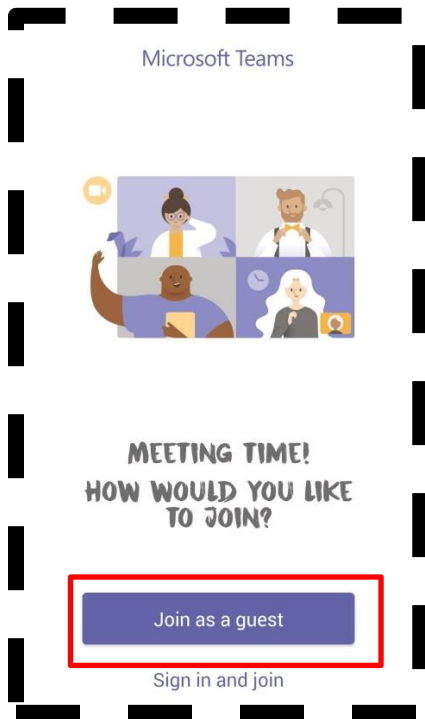


(PSP) If PSP is using a phone, instruct them to select the download app option from the browser, open MS Teams, select “Join as a Guest,” and input a screen name.

*Note: MS Teams app must be downloaded if teleconferencing via phone*

(Phone view)

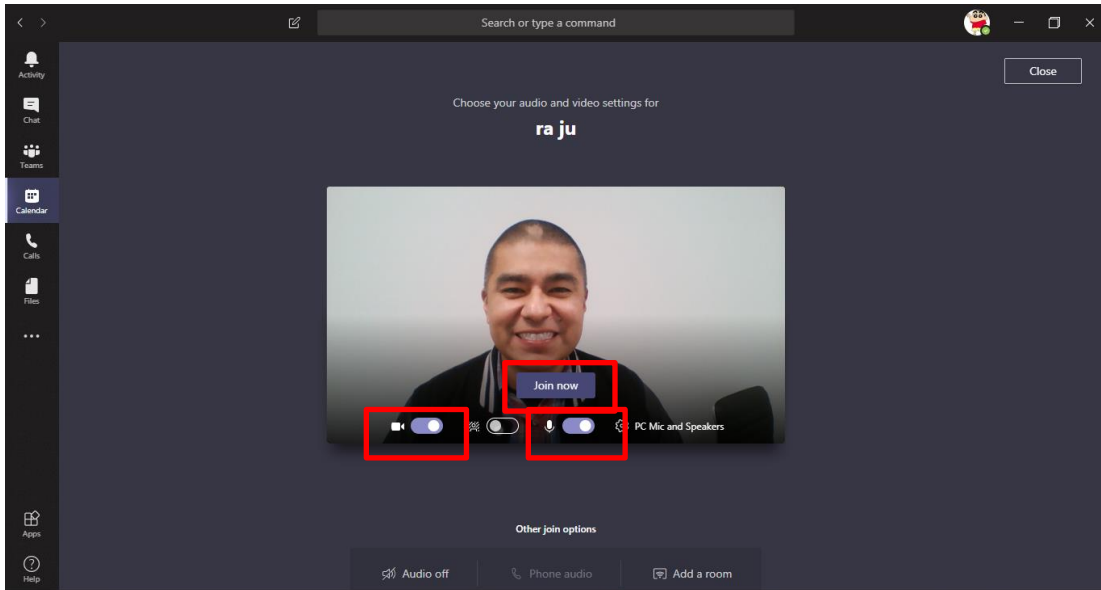




4. While the pre-live view, ensure both video and microphone icons are switched to “on” (i.e., to the right and lit purple), your face is centered within the frame, and push the “Join now” button to enter the meeting.

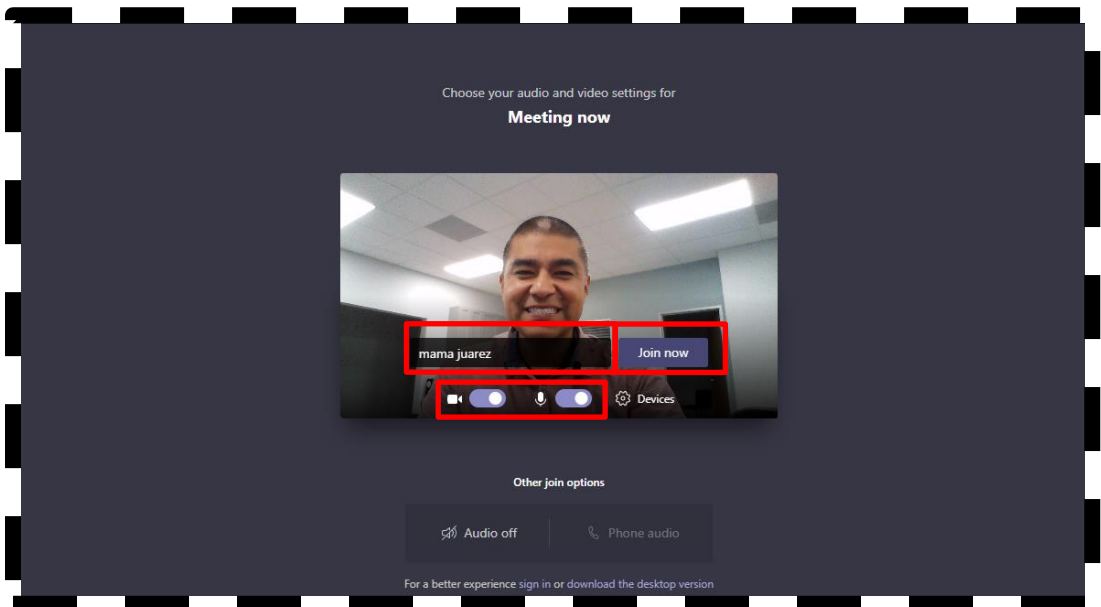
(Computer view)



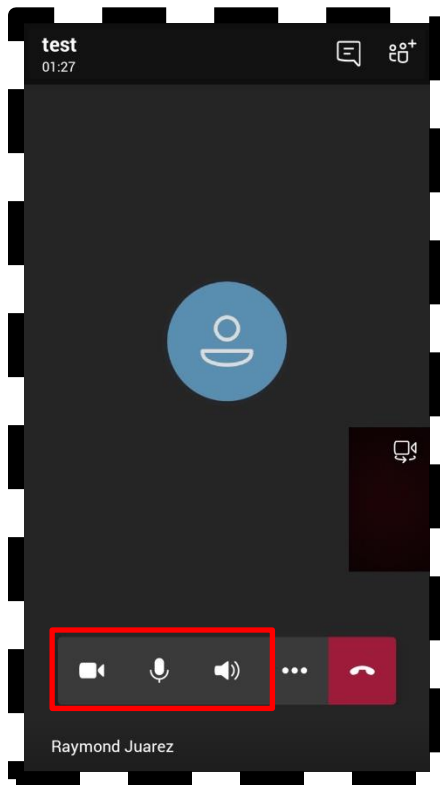
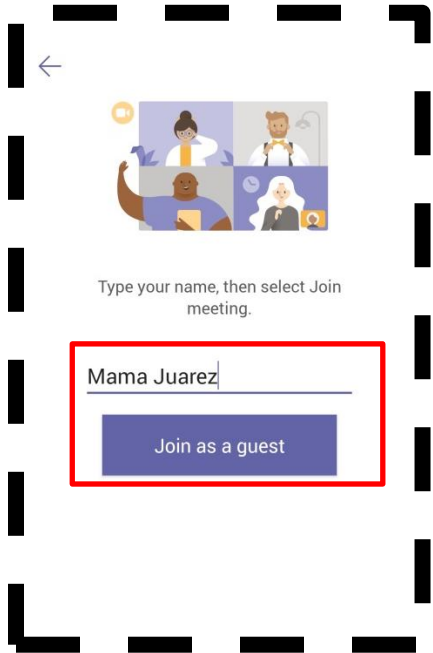


5. (PSP) Instruct the PSP to ensure their video and microphone icons are switched to “on” (allow permissions for the phone to use the camera and microphone, if applicable), input a screen name, and select the “Join now/Join as guest” button when ready.

(Computer view)



(Phone view)



6. Do a video check by looking at yourself on the bottom right frame and do an audio check by asking if the PSP can hear you.



7. Once the audio and video are confirmed to be working by both supervisor and PSP, begin your telehealth session.

### **Appointment Content**

1. Before the onset of any telehealth communication, obtain written or verbal consent by the client (if 18+ and not conserved) or parent/guardian. For verbal consent, document date and consent in the client's Call & Activity Log widget in their CR profile; for Regional Center clients, email date and consent to the client's respective Service Coordinator.
2. Connect to the internet utilizing your VPN connection
3. Notify PSP or client to contact 911 in the event of an emergency.
4. Review your agenda for the appointment prior to the onset (e.g., "Today we will review Tom's updated screaming data, complete the Reinforcement Training Module, and train you to initiate the new mand training").
5. Utilize Behavior Skills Training for all behavior technician and parent/PSP training.
6. Complete the correct Treatment Progress Note before the end of your session.



7. Schedule and confirm your next appointment.