


**KPNC Division of Research**  
**FAQs on conducting meetings with research participants using MS Teams**  
**(Updated 4/29/2020)**

These FAQs are intended to support and accompany the instructions, “How to set up a group meeting in MS Teams for research participants.” For more information and tips on using MS Teams, go to the [KP Workplace Technologies](#) website, where you can also find this [Quick Start Guide](#).

| <b>Q1</b>                                                            | <p><b>My study already has IRB approval for in-person one-on-one (1:1) visits or group meetings with research participants. Do I need to get IRB approval to change to virtual visits or remote group meetings with research participants?</b></p> <p>ANSWER: Yes, submit an IRB modification request via IRBNet, as per usual. If this change is due to COVID-19, please remember to use the new COVID-19 modification form.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |       |                                                                                                                                                                                 |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
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| <b>Q2</b>                                                            | <p><b>Can my study use Teams for virtual 1:1 visits as well as virtual group meetings with research participants?</b></p> <p>ANSWER: Yes</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |       |                                                                                                                                                                                 |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| <b>Q3</b>                                                            | <p><b>I heard that HealthCare Anywhere (HCA) can be used for virtual 1:1 visits with KP members. Which application is better for virtual 1:1 visits with research participants – HealthCare Anywhere or Microsoft Teams?</b></p> <p>ANSWER: You can use either Teams or HCA, though you may be more familiar with how to use Teams since HCA is relatively new to KP. See below for a table comparing the HCA and Teams applications.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #cccccc;"> <th></th> <th>HCA</th> <th>Teams</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>Requires a KP issued cellphone/laptop to schedule a video/audio call</td> <td style="text-align: center;">Yes</td> <td style="text-align: center;">Yes</td> <td>Per KP policy, participants should be contacted only through KP issued devices.</td> </tr> <tr> <td>Requires participant to download an app</td> <td style="text-align: center;">No</td> <td style="text-align: center;">No</td> <td>For Teams, if on a cell phone, participants will get a message to download the app. To avoid this, access via a desktop or laptop and select option to <i>join on the web</i>.</td> </tr> <tr> <td>Can schedule video/audio calls in advance</td> <td style="text-align: center;">No</td> <td style="text-align: center;">Yes</td> <td></td> </tr> <tr> <td>Can make outgoing video/audio calls to non-KP phones</td> <td style="text-align: center;">Yes</td> <td style="text-align: center;">Yes</td> <td>For Teams, may need to obtain audio conference license first.</td> </tr> <tr> <td>KP branded</td> <td style="text-align: center;">Yes</td> <td style="text-align: center;">No</td> <td>A KP logo appears on screen.</td> </tr> <tr> <td>Audio/visual good quality</td> <td style="text-align: center;">Yes</td> <td style="text-align: center;">Yes</td> <td>Participant can be heard clearly, there is no lag in response.</td> </tr> <tr> <td>Screen sharing good quality</td> <td style="text-align: center;">No</td> <td style="text-align: center;">Yes</td> <td>For Teams, there is no lag while scrolling through pages, images and text are clear.</td> </tr> </tbody> </table> <p><i>Thanks to Hilda Cerros and Fernanda Manriquez of the Autism Research Program for sharing this table.</i></p> |       | HCA                                                                                                                                                                             | Teams | Comments | Requires a KP issued cellphone/laptop to schedule a video/audio call | Yes | Yes | Per KP policy, participants should be contacted only through KP issued devices. | Requires participant to download an app | No | No | For Teams, if on a cell phone, participants will get a message to download the app. To avoid this, access via a desktop or laptop and select option to <i>join on the web</i> . | Can schedule video/audio calls in advance | No | Yes |  | Can make outgoing video/audio calls to non-KP phones | Yes | Yes | For Teams, may need to obtain audio conference license first. | KP branded | Yes | No | A KP logo appears on screen. | Audio/visual good quality | Yes | Yes | Participant can be heard clearly, there is no lag in response. | Screen sharing good quality | No | Yes | For Teams, there is no lag while scrolling through pages, images and text are clear. |
|                                                                      | HCA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Teams | Comments                                                                                                                                                                        |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| Requires a KP issued cellphone/laptop to schedule a video/audio call | Yes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Yes   | Per KP policy, participants should be contacted only through KP issued devices.                                                                                                 |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| Requires participant to download an app                              | No                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | No    | For Teams, if on a cell phone, participants will get a message to download the app. To avoid this, access via a desktop or laptop and select option to <i>join on the web</i> . |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| Can schedule video/audio calls in advance                            | No                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Yes   |                                                                                                                                                                                 |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| Can make outgoing video/audio calls to non-KP phones                 | Yes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Yes   | For Teams, may need to obtain audio conference license first.                                                                                                                   |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| KP branded                                                           | Yes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | No    | A KP logo appears on screen.                                                                                                                                                    |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| Audio/visual good quality                                            | Yes                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Yes   | Participant can be heard clearly, there is no lag in response.                                                                                                                  |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| Screen sharing good quality                                          | No                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Yes   | For Teams, there is no lag while scrolling through pages, images and text are clear.                                                                                            |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| <b>Q4</b>                                                            | <p><b>Does the research participant have to be a KP member to use Teams or HCA?</b></p> <p>ANSWER: No</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |       |                                                                                                                                                                                 |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |
| <b>Q5</b>                                                            | <p><b>Is it possible to send a group meeting invitation without disclosing the email addresses of the potential participants?</b></p> <p>ANSWER: Yes, step-by-step instructions on how to do this are detailed in the document “How to set up a group meeting in MS Teams for research participants,” which may be found on <a href="#">DOR’s COVID-19 webpage</a> in the Project Management section.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |       |                                                                                                                                                                                 |       |          |                                                                      |     |     |                                                                                 |                                         |    |    |                                                                                                                                                                                 |                                           |    |     |  |                                                      |     |     |                                                               |            |     |    |                              |                           |     |     |                                                                |                             |    |     |                                                                                      |

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| <b>Q6</b>  | <p><b>Can a participant use Teams without downloading the app first?</b></p> <p>ANSWER: Yes, see instructions under “HELPFUL INSTRUCTIONS TO INCLUDE IN EMAIL TO PARTICIPANTS.” The participant will have the option to click on the button to download the app or the button to join on the web instead. Tell them to click the button to “Join on the web instead.”</p> <p>Note: participants using an iPhone (and most likely iPad users too) will need to download and install the app first.</p>                                                                                                                                                                                                   |
| <b>Q7</b>  | <p><b>Does the participant have to use a particular device to use Teams?</b></p> <p>ANSWER: The participant should be able to join a Teams meeting from their desktop, laptop, or mobile device (for example, iPhone, iPad, Android phone, or tablet).</p> <p>Note: participants using an iPhone (and most likely iPad users too) will need to download and install the app first.</p>                                                                                                                                                                                                                                                                                                                  |
| <b>Q8</b>  | <p><b>Does the participant have to be using a particular browser when they join the Teams meeting? What is the best browser to use?</b></p> <p>ANSWER: Teams is supported on many browsers, including Chrome (latest version), Microsoft Edge, Internet Explorer 11, Safari, and Firefox (latest version). However, some of the Teams calling and meeting features are limited on a few of the browsers (for example, Internet Explorer 11, Safari, and Firefox).</p>                                                                                                                                                                                                                                   |
| <b>Q9</b>  | <p><b>I noticed that the phone audio option is greyed out and I am unable to make or receive calls in Teams from parties outside of KP. What can I do to fix this so that participants can join my Teams meeting by phone?</b></p> <p>ANSWER: You may need to ask the MS Teams administrator to grant you an “audio conference license” to enable calls to and from outside parties using Teams. To request an audio conference license, call the National IT Help Desk at 888-457-4872 or submit a request via <a href="#">ServiceNow</a>.</p>                                                                                                                                                         |
| <b>Q10</b> | <p><b>Can Teams meetings be recorded, including audio and/or visual?</b></p> <p>ANSWER: Yes, the recording feature is enabled, but may not work with all browsers (see FAQ 8). Please test before using. One study team has drafted instructions on how they use this feature, which they are allowing us to share (to view attached file, click on the icon  on the bottom left of screen when in Nitro). Please note that, by California law, you must get permission from all participants before recording.</p> <p>Note: you must have IRB approval to record your meetings in Teams or another application.</p> |
| <b>Q11</b> | <p><b>Can we share our screens with the participant(s) during a Teams meeting?</b></p> <p>ANSWER: Yes, the sharing screen feature is enabled, but may not work with all browsers (see FAQ 8). Please test before using.</p> <p>Note: you must have IRB approval for screen sharing (i.e., of specific documents) in Teams or another application.</p>                                                                                                                                                                                                                                                                                                                                                   |
| <b>Q12</b> | <p><b>Where can I go for more information and tips on using MS Teams?</b></p> <p>ANSWER: Go to the <a href="#">KP Workplace Technologies</a> website, where you can also find this <a href="#">Quick Start Guide</a>.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |