

## How to set up a group meeting in MS Teams for research participants

### IMPORTANT PRELIMINARY NOTES:

The study must have IRB approval prior to setting up and conducting a virtual group meeting (by submitting via IRBNet as part of a new study packet or a modification request, as per usual).

To be able to join a Teams meeting, meeting participants will need the following:

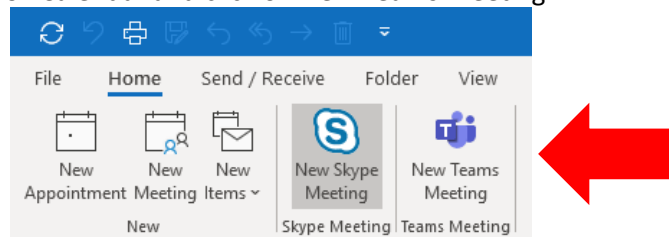
- A device (for example, PC desktop or laptop, Apple computer or MacBook, iPhone, Android) with access to the Internet; and
- An email account to receive the invite. The meeting invitation may be sent via SMS or other technology, but that is not covered in these instructions.

In order to preserve KP bandwidth for patient care, we suggest that you conduct the Teams meeting off the KP network (that is, without using KP's VPN).

Please note that it is possible to join a Teams meeting by phone, but that is not covered in these instructions.

### INSTRUCTIONS:

A. Open Outlook Calendar and click on New Teams Meeting:



- Enter meeting information (i.e., title, time, location, etc).
- In the "To" field, enter the DOR meeting organizer's email address (*note: you can send to yourself as the meeting organizer*). To avoid disclosing participant emails, do **\*not\*** enter participant email addresses.
- Send the invite.
- Open the meeting in your Outlook Calendar:
  - Verify the meeting information is correct.
  - Copy the Teams meeting details from the body of the invite.
- Create new email in Outlook.
- List participant emails in the blind copy (Bcc) line of the email. *Note that you can enter KP or non-KP email addresses in this field.*
- Enter your email address or another study team member's email address in the Cc line of the email. (*Optional*)
- Compose the email (see detailed instructions for participants below) and paste the Teams meeting details that you previously copied.
- Send the email.

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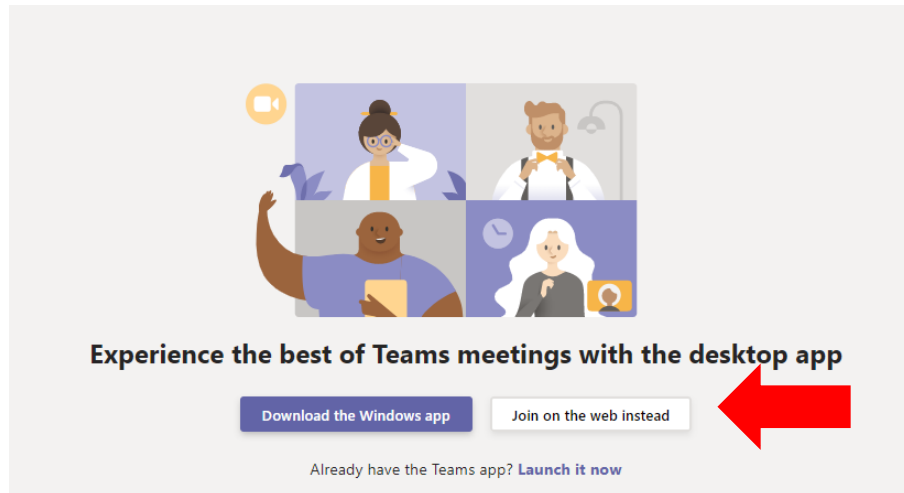
### HELPFUL INSTRUCTIONS TO INCLUDE IN EMAIL TO PARTICIPANTS:

1. At least five (5) minutes before the scheduled meeting time, open the email from the meeting organizer and click on the link:

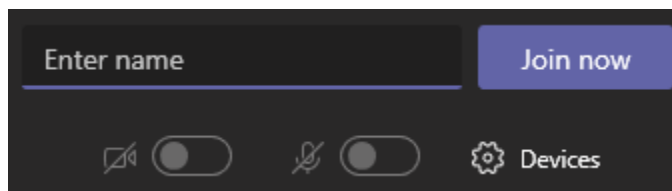
[Join Microsoft Teams Meeting](#)



2. Click on "Join on the web instead":



3. Click "Join now" after doing the following:
  - o Enter name: you may type in your full name, initials, first name and last initial, or a codename/pseudonym, depending on instructions provided by study team.
  - o Camera icon: click on the button to turn video on/off. *Only applicable if camera option is available.*
  - o Microphone icon: click on the button to turn the microphone on/off.



4. The following message will be visible until the organizer starts the meeting and admits you:

**Someone in the meeting should let you in soon**