

## *Virtual Meetings Using Microsoft Teams*

<b>Reviewed Date</b>		<b>Number</b>	IM0122
<b>Revised Date</b>		<b>Approved Date</b>	May 4, 2022

### ***Introduction***

The Simcoe Muskoka District Health Unit (SMDHU) has completed a privacy and security review of Microsoft Teams (MS Teams) as a virtual meeting tool that enables communications between SMDHU staff teams/groups as well as communications with external partners/individuals in a meeting.

### ***Purpose***

The purpose of this policy is to describe the parameters of using MS Teams as SMDHU's virtual meeting platform.

### ***Legislative Authority***

Municipal Freedom of Information and Protection of Privacy Act, 1991  
Personal Health Information Protection Act, 2004

### ***Policy Definitions and Interpretation***

**Personal Health Information** - identifiable information about an individual in oral or recorded form, if the information:

- relates to the physical or mental health of the individual, including information that consists of the health history of the individual's family,
- relates to the providing of health care to the individual, including the identification of a person as a provider of health care to the individual,
- is derived from the testing or examination of any such body part or bodily substance,
- is the individual's health number, or,
- Identifies an individual's substitute decision-maker.

**Sensitive/Confidential Information:** includes information maintained by SMDHU that is not routinely made publicly available, including financial, administrative, commercial and technical information. Can also include records containing legal and employee-related information.

**Official record:** A legally recognized document that provides evidence of business activities, decisions and transactions and is managed within a records classification system. These records are required to meet financial, legal, regulatory, operational, historical or other legislative obligations. For example, key internal and external communication and interactions., briefing notes, policies, directives, approved minutes, materials of historical or research importance, contracts and supporting documents

## ***Policy***

This policy identifies the procedures for health unit staff that organize and facilitate meetings and use MS Teams as a virtual meeting platform. The health unit does not use MS Teams as a repository for official records of SMDHU. Recordings in MS Teams can be made but must follow the parameters outlined in the [Instructions for Microsoft Team Meetings](#).

## ***Procedures***

### **Access to Meetings**

The technological default is set so that all SMDHU staff can enter the meeting directly, i.e., they do not 'wait in the lobby'. However, external meeting participants 'wait in the lobby' until they are admitted by an SMDHU staff. If unexpected guests enter the meeting, SMDHU staff will clarify their attendance. [See Instructions for Microsoft Teams Meetings](#) for detailed instructions.

### **Presenter**

The technological default is set in MS Teams so that all internal health unit staff, as well as external participants, can present/share their screen at any time.

### **Meeting Chat Function**

The chat function should not be used for:

- Personal Health Information
- Confidential Sensitive Information (e.g., legal, financial, related to human resources)

Please Note: Anything put in the chat section can be viewed by anyone who was invited to the meeting regardless if they attend, and by the meeting organizer. The chat function dialogue remains for 24 to 48 hours after the meeting ends, as per Microsoft default.

### **Recordings and Screen Capture**

The technological default is set so that all SMDHU staff in the meeting can create recordings, however external participants joining an SMDHU-created meeting do not have the functionality set to record the meeting.

Recordings or screen captures must not include any verbal or written disclosure of personal health information. If personal health information is inadvertently shared, the recording will be stopped and the saved file will be deleted within two hours following the meeting, and the supervisor notified of the deletion. Please refer to [Instructions for Microsoft Teams Meetings](#) for the deletion procedure.

Sensitive or confidential information can be recorded or captured after the approval of the Direct Supervisor and must be saved in a secure health unit location, as determined by the Direct Supervisor. Participants must be informed of the purpose of capturing or recording any session. Refer to [Instructions for Microsoft Teams Meetings](#) for a script to send to or share with all participants.

**Related Resources:**

[Instructions for Microsoft Teams Meetings](#)

For Microsoft User Guide - visit [website "Meetings in Teams"](#)

**Related Policies**

IM0101 Personal Health Information Privacy Policy

TQ0101 Acceptable Use

Final Approval Signature: \_\_\_\_\_

Review/Revision History: