



MedStaff Central • on MS Teams

ONBOARDING MANUAL



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MedStaff Central • on MS Teams

ONBOARDING MANUAL



- Set up Microsoft Teams (MS Teams) while onsite at a PHC, VCH or PHSA facility, or remotely from your home or community office. No personal license is needed.
- Use your health authority login for one-time set up only.
- You can choose to stay logged in for seamless access to your PHC Medical Staff Teams and associated channels.



Before you start

Have these essentials ready

Login credentials from any BC health authority:
e-mail and password (UBC login will not work)

A mobile phone + computer: laptop, PHC desktop

Any browser / system: Windows, MacOS
Android, iOS/iphone, iPad, other mobile devices

Apple or Google App store on your mobile device



What you can expect

Joining your Department and Medical Staff Teams

Step 1: Set up MS Teams one time on each device

Step 2: Customize Teams for your needs

You're in! Start using Teams to **connect, chat, meet,**
and **share files** with colleagues

Resources for setting up

Quick Setup Guide

- Set up MS Teams and customize your own Team

Detailed Onboarding Manual

- More instructions for setting up and using Teams

Clip Training – short demo videos

- Go to: <https://vpp.cliptraining.com>
- Select the **big orange button: Microsoft 365 Login**
- Select **your account**
- In left menu, select **Course Library**
- Select **Teams Training**



Go to Clips

Note: Instructions cover common steps and interfaces on PCs and Apple iPhones – but can vary across different devices, operating systems, browsers, and MS Teams app versions.

Support

General Technical Support

PHC Service Desk **604-806-9333** or [chat here](#)

Other support needs

danielle.pinheiromuller1@phc.ca

- Resolve MS Teams License alerts
- Arrange for health authority credentials
- Create a new division or interdepartmental Team
- Troubleshooting
- Medical staff inquiries about this initiative

Get video support: Clip Training

About Clip Training

Short demo videos for to help you set up and use MS Teams



Go To: <https://vpp.cliptraining.com>

Select the **big orange button:**

Microsoft 365 Login

Welcome to Your VPP Portal

Warning You do not appear to be signed in. Please log in for access.

your health authority e-mail address

.....

☒ Remember me

Forgot Password?

Sign In

Microsoft 365 Login

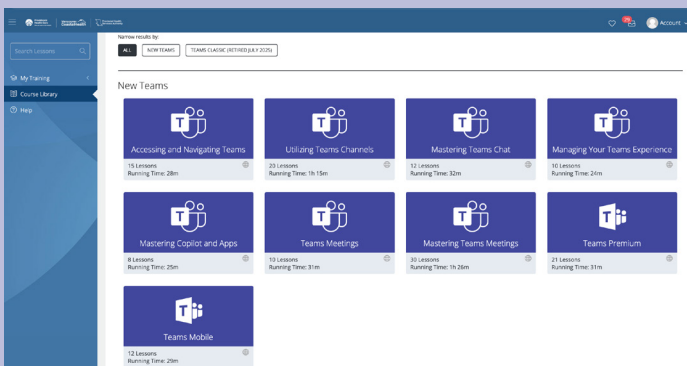
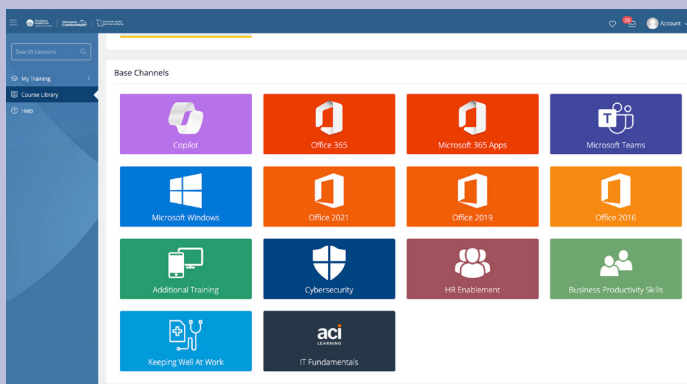
Microsoft

Pick an account

Your health authority Account

Use another account

Browse Clip Training



Course Library > Microsoft Teams > Accessing and Navigating Teams

Accessing and Navigating Teams

In this course, Accessing and Navigating Teams, we will review various methods to access and navigate the Teams application. In addition, you will learn how to create, join and work with different Teams.

Getting Started with Teams Play Section

Lesson 1 : Getting Started	2m 28s
Lesson 2 : Accessing the Teams Web App	1m 39s
Lesson 3 : Accessing the Teams Desktop App	1m 33s
Lesson 4 : Accessing the Teams Mobile App	1m 56s
Lesson 5 : Navigating the Teams App	2m 17s
Lesson 6 : Modifying Application Settings	1m 51s
Lesson 7 : Locating Device Settings	1m 0s
Lesson 8 : Adding or Removing an Account	1m 59s

Creating and Working with Teams Play Section

Lesson 9 : Creating a New Team	4m 43s
Lesson 10 : Creating a Team from a Template	3m 8s
Lesson 11 : Creating a Team from a Group	1m 35s
Lesson 12 : Joining a Team	1m 20s
Lesson 13 : Leaving a Team	0m 48s
Lesson 14 : Rearrange the Order of Teams	0m 39s
Lesson 15 : Showing and Hiding Teams	1m 28s

1

One-time MS Teams Setup

Download MS Teams



Computer

Onsite at a facility computer: Open MS Teams from Windows Start menu

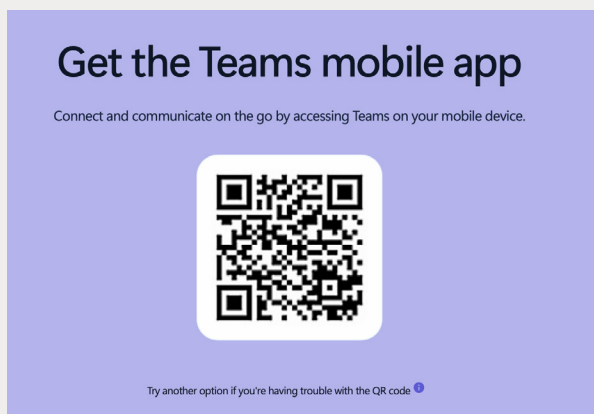
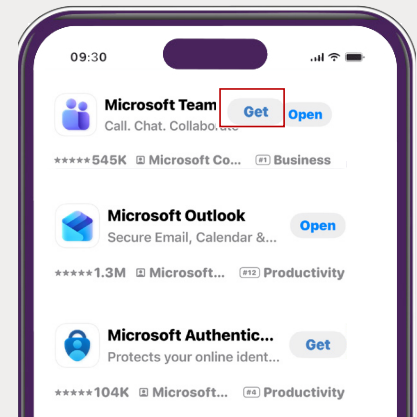
On your own computer: [Download MS Teams](#)



Or scan QR code >

Mobile

Download 'Microsoft Teams' from the Apple or Google App Store



Set up Multi-Factor Authenticator (MFA)

Required setup for using MS Teams securely



Onsite at a facility computer

- **Sign in** with your health authority login
- On your web browser go to: <https://aka.ms/mfasetup>
- On **'More information required'** select **'next'** >
- On the **"MFA SSPR"** page select **'next'** and follow **Step 2 below**

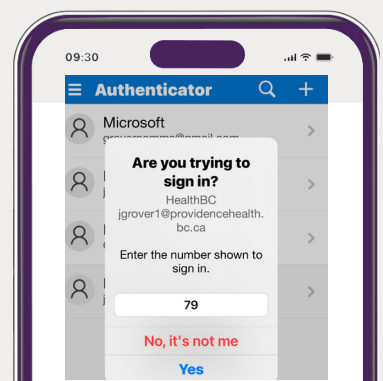
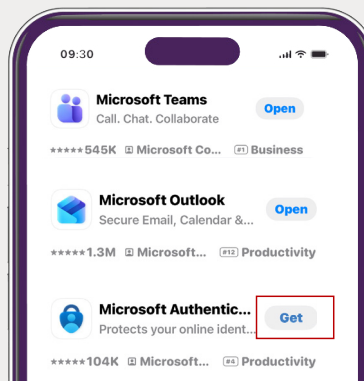
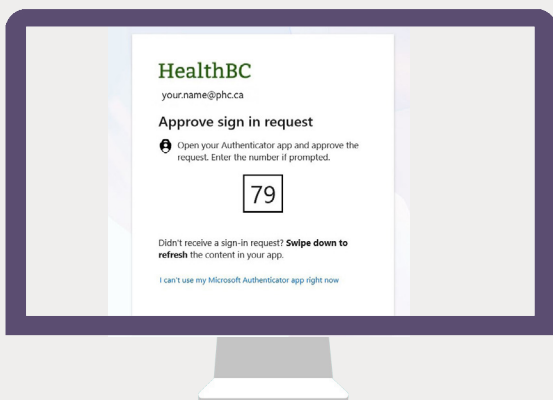
Remotely

- **First: Get a temporary access code** from Service Desk: 604-806-9333 [or here](#)
- Open browser to: <https://aka.ms/mysecurityinfo>
- **Sign in** with your health authority login and the **temporary access code**
- **Follow Step 2 below**

Step 2: Onsite or remotely on your own computer

On your phone: download 'Microsoft Authenticator' from your App Store

- **Add your account:** Tap + (top right) > select Work
- **Scan QR code** in the browser and select **'next'**
- **Approve notification** in the Authenticator App on mobile



What is Multifactor Authentication?

Almost all online services - banks, social media, and Microsoft 365 - are now adding "Two-Step Verification" or "Multifactor Authentication."

When you sign into the account for the first time on a new device or app (like a web browser) you need **more** than just your username and password. You need a second verification method - a second "factor" - to prove who you are. [Source: Microsoft.com](https://source.microsoft.com)

1

One-time MS Teams Setup

Sign into MS Teams

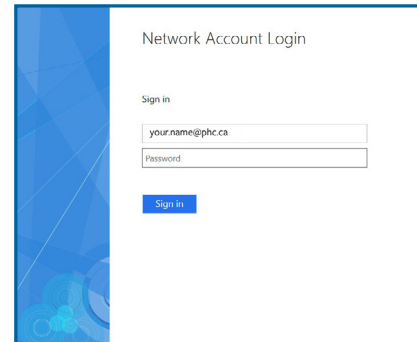
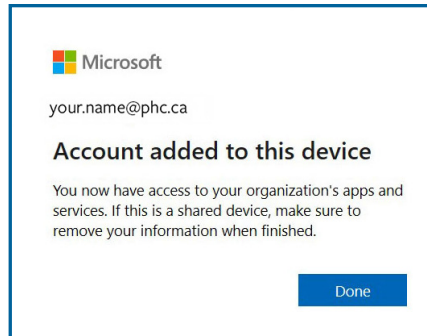


Sign into PHC MS Teams with your health authority login

- E-mail address and password



Once set up, you can choose to stay logged in for continuous, seamless use of PHC Teams



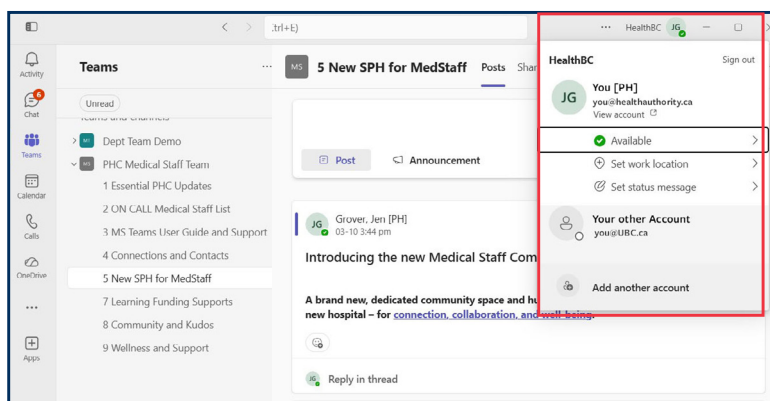
If you see “Your license doesn’t include access to Microsoft Teams”– request support here: danielle.pinheiromuller1@phc.ca

Manage Multiple MS Teams Accounts



If you have more than one account, e.g. PHC + UBC + Personal

- You can see **notifications for other active accounts** even when logged into PHC
- **To toggle accounts**, tap your profile picture / initials at the top
- **Unread items** in accounts will show a red notification badge



Devices differ slightly:

- **Mobile** can receive notifications for inactive accounts
- **Desktop**: receives pop-ups only for the active account (e-mail notifications are still sent)

Separate Teams and Chats

 **Split your Teams and Chats into distinct tabs in your window for quick and direct access to your channels**



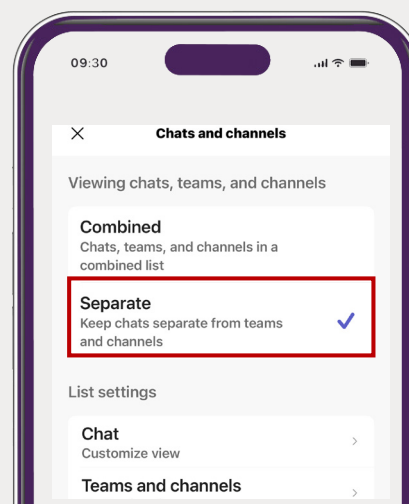
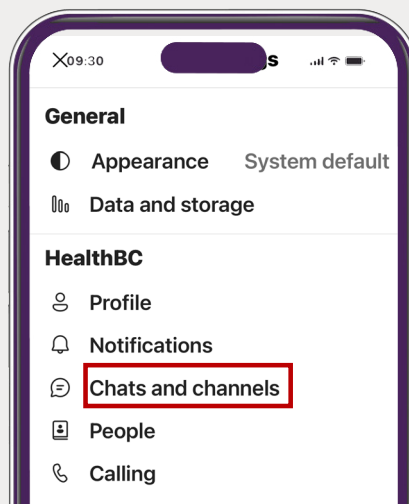
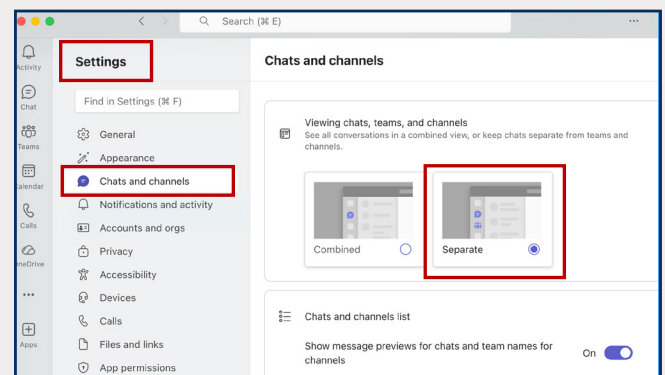
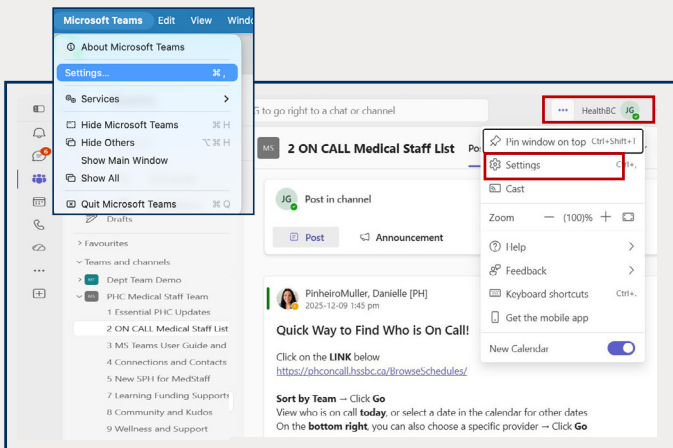
Computer

- On MS Teams, go to the **top-right corner of the window** > click your profile picture or initials > Select **Settings**

Mobile

- On MS Teams, tap your **profile picture/initials** (top-left) > Tap **Settings**

- Choose **Chats and Channels**
- Change from Combined to Separate**



Set preferences for general notifications

⚙️ Reduce noise while keeping your most important alerts

Set your preferences for how you would like to be notified

New posts, messages, replies, meetings • Quiet hours or days • Alert sounds, badges

Tip: Turn on “Replies to followed threads and posts” to be alerted to activity in your active chats (or turn off)

Set device/computer preferences first

Some systems and devices will ask you to change/set your universal settings to allow MS Teams notifications:

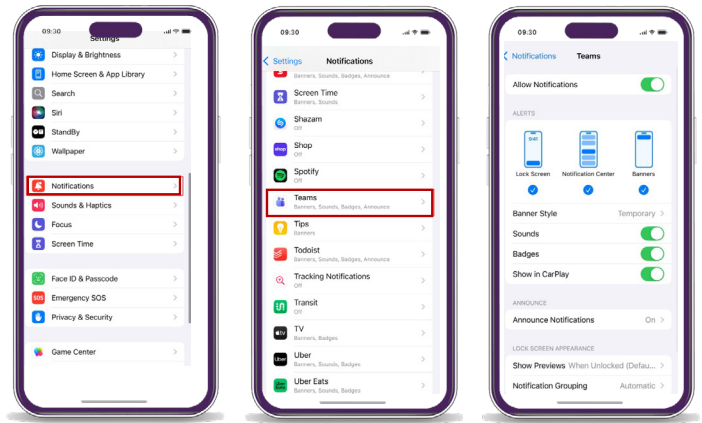
Go to your phone's **Settings**

> **Notifications** > allow **MS Teams** (toggle)

Notifications and activity

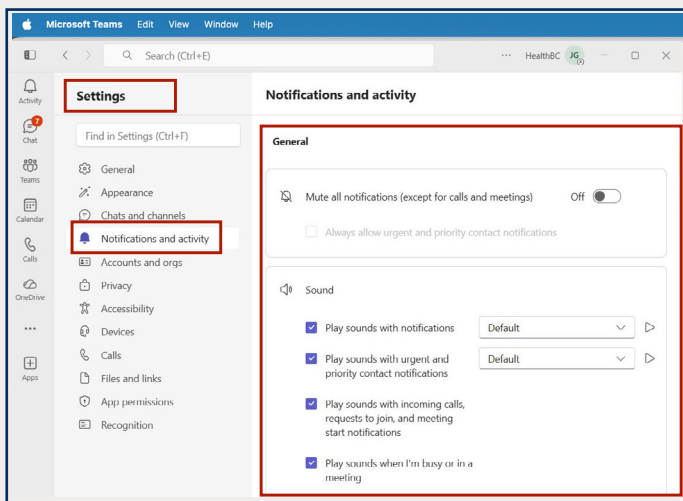
Manage OS notification and focus preferences
To receive Teams notifications, you'll need to adjust your OS settings. These settings won't affect calls and meeting notifications. [Learn more](#)

Allow Teams notifications on your device
[Open OS Notification settings](#)



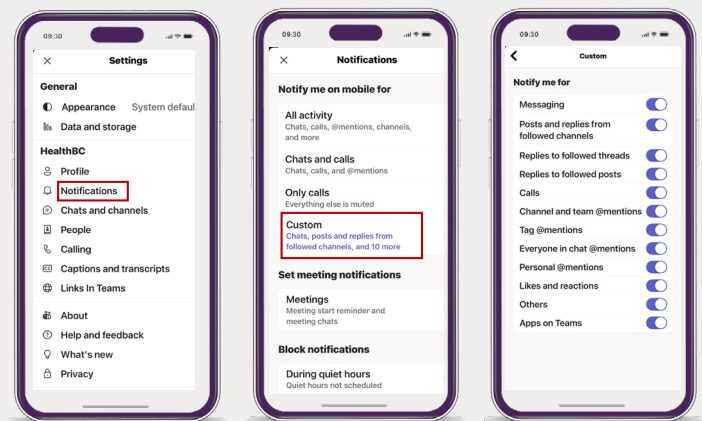
Set MS Teams preferences: computer

- On MS Teams, go to the **top-right corner of the window** > click your profile picture or initials
- Select **Settings** > **Notifications** and **Activity** to set up



Set MS Teams preferences: Mobile

- Open the **MS Teams** app
- Tap your profile picture/initials (top left) > tap **Settings** > tap **Notifications** to set up



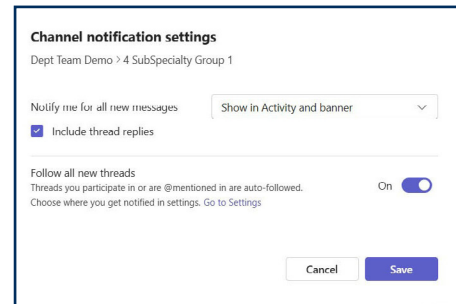
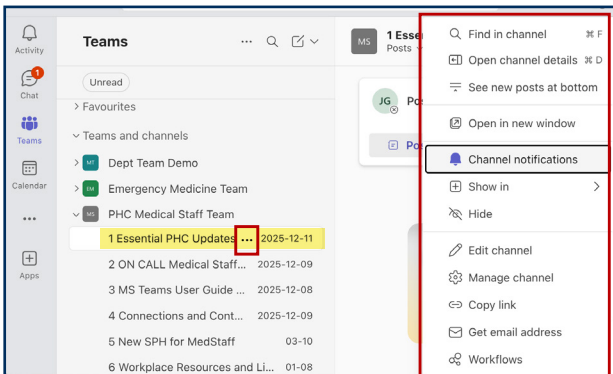
You can also set up your iWatch to receive notifications.

Set notifications for your channels

⚙️ Set alerts for your most important channels and “Essential PHC Updates

Computer

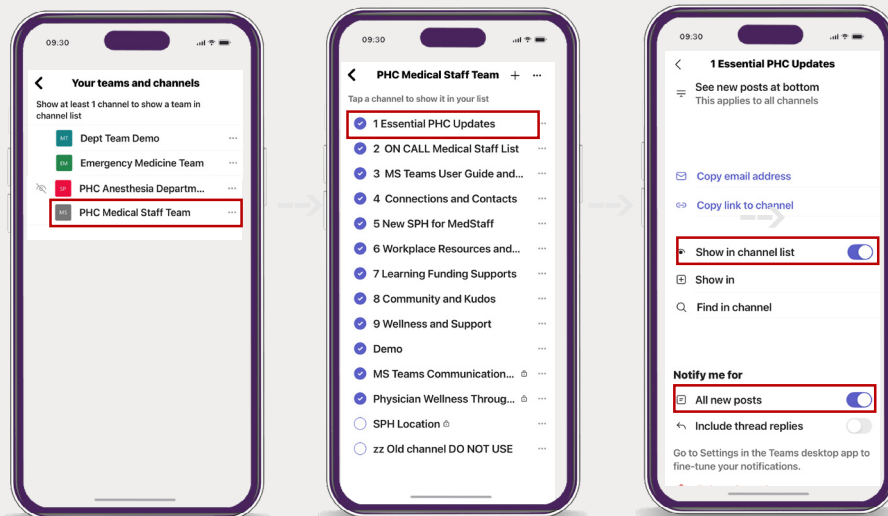
- On MS Teams go to: **Medical Staff Team > Essential PHC Updates** channel
- Click (⋮) in the channel name for more channel options
- Choose **Channel Notifications** options: **Banner and Feed**



Repeat for each channel important to you

Mobile

- On MS Teams select the **Medical Staff Team > Essential PHC Updates** channel
- Tap channel name at the top for more options
- Select **Notify for all new posts**



Inside MS Teams

⚙️ About your Teams and Channels



Teams

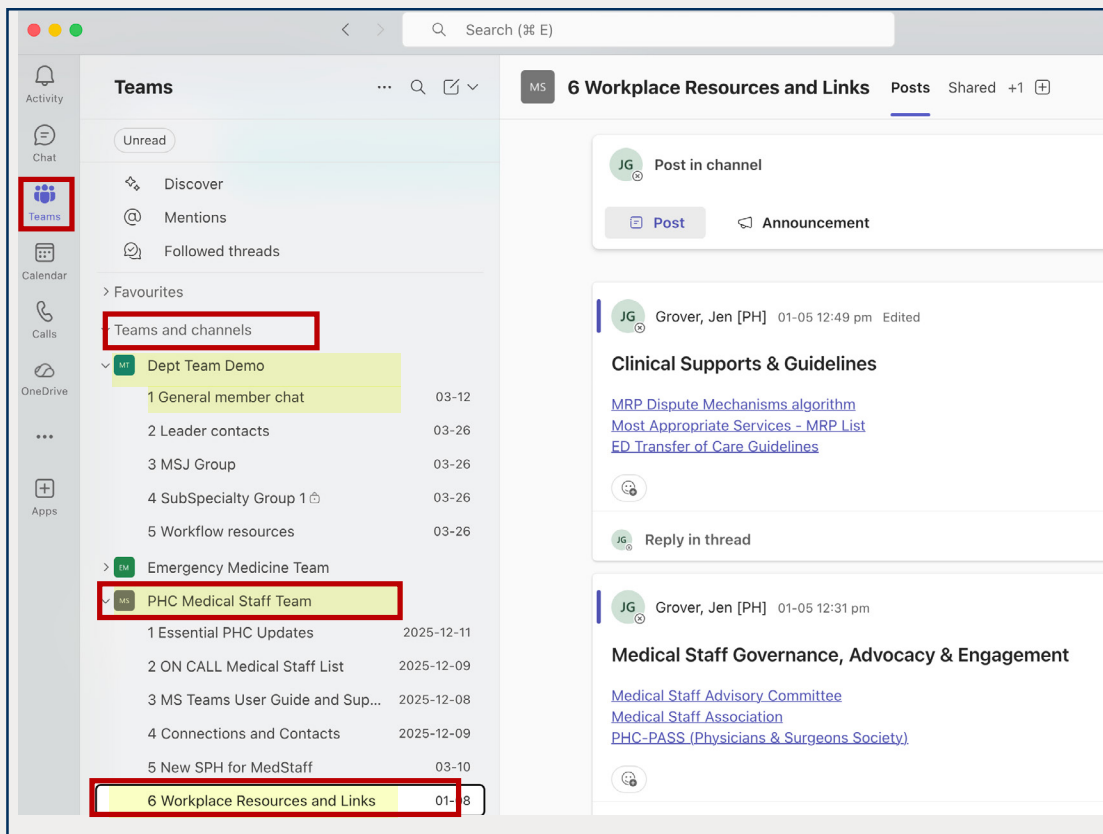
Your Teams

- **Your Department Team:** Your Department head will add you as a member, and you may also be invited to join private channels within the Team
- **The PHC Medical Staff Team:** Medical Affairs will add you as a member

Channels within each Team

Organized into your group's different work priorities or chats

- **Channel threads:** Focused discussions and replies under one topic
- **Channel posts:** Team-wide resources, announcements and structured discussion



Chat one-on-one or with multiple people



Chat



Activity



Chat



Teams



Calendar



Calls



OneDrive



Select Chat to start a one-on-one or group discussion:

- **Type in a name** to find a colleague in the PHC directory and start a chat
- **Type @mention** (@ before their name) to direct chats to specific people in a group discussion

Chats will automatically delete after 13 months

To delete sooner, the chat must be removed by the same person who posted it

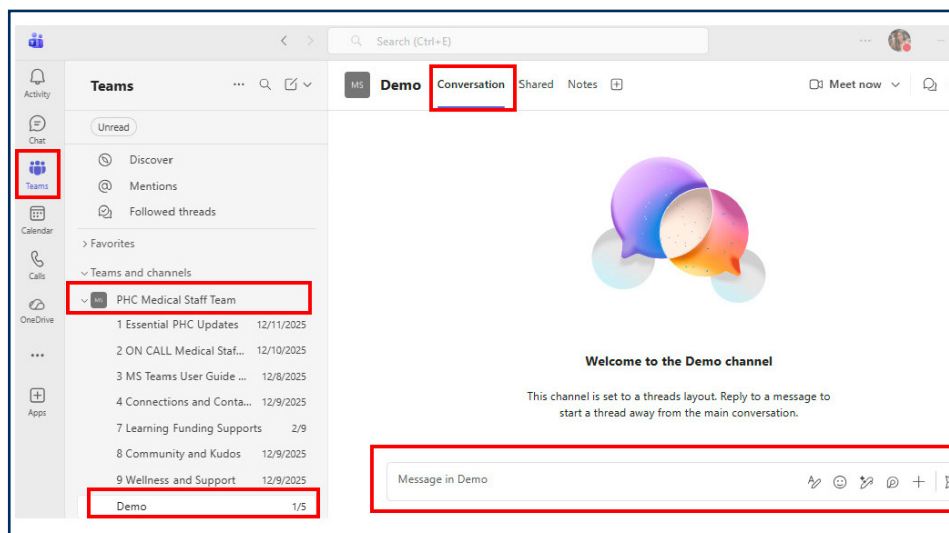


Chat inside group channels

Chats

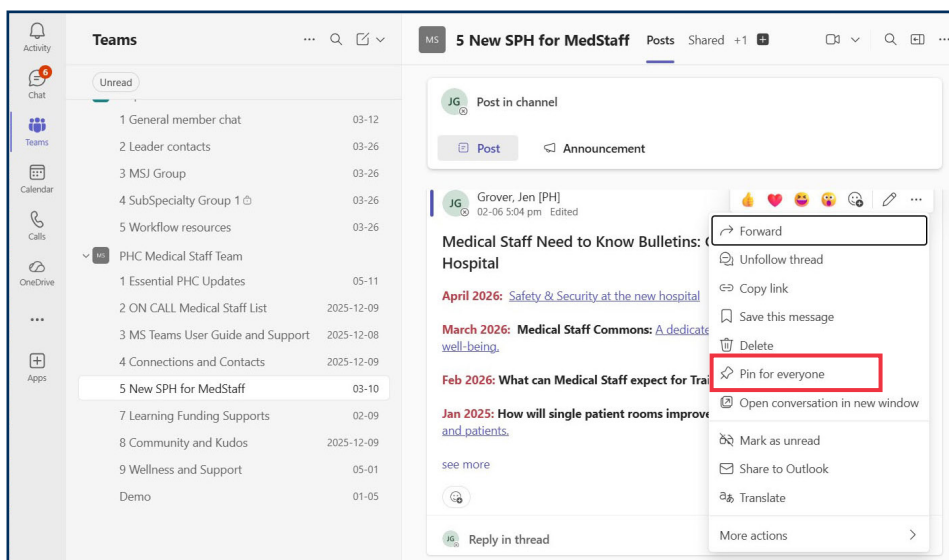
Chat within a channel among a larger group

- **Select the relevant Channel** within your Team to start or join focused discussions
- Your posts will become part of **Channel Threads**
- You can **set your notifications** to alert you to any new channel posts and replies to your chats (see page 9)



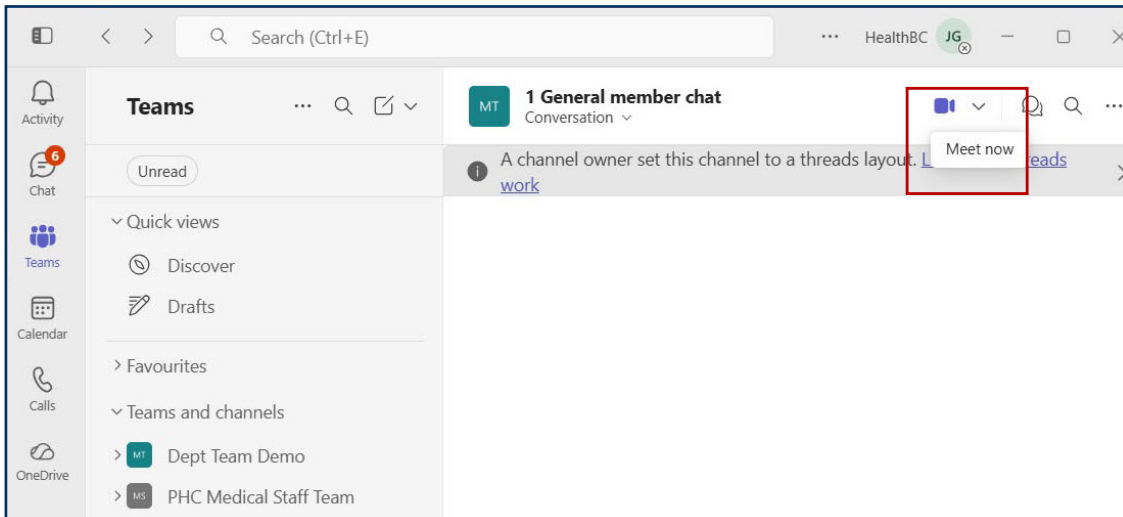
Pin important chats or channels to the top of your list

Hover over a chat or channel name. Click More options (⋮) > Pin

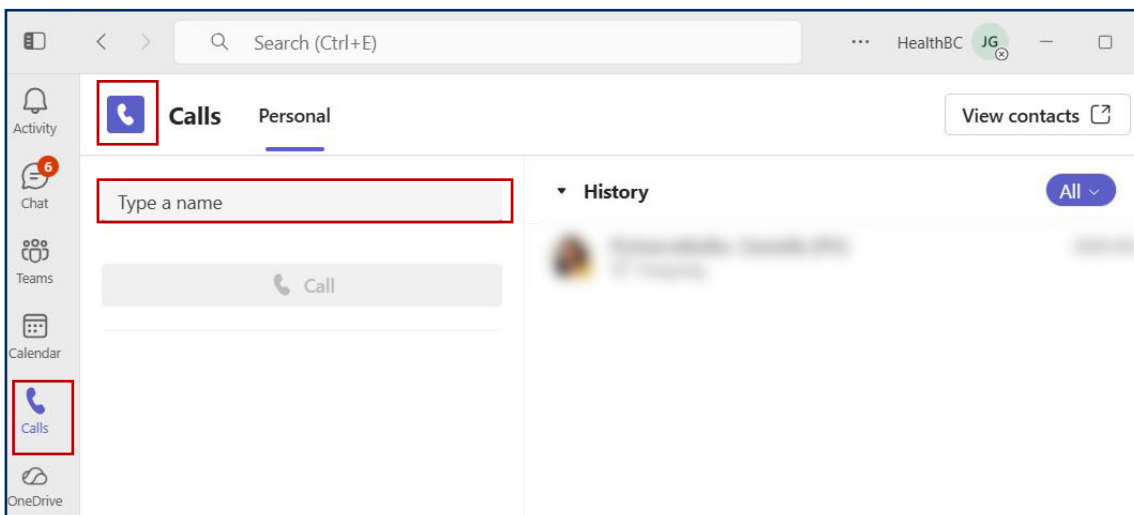


Make a video or phone call in a chat

Video Call: In a Teams chat, look for the camera icon

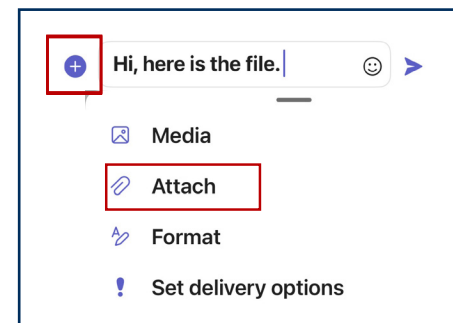
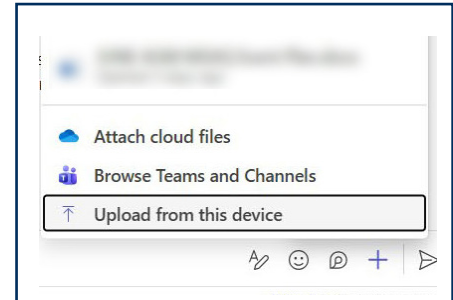
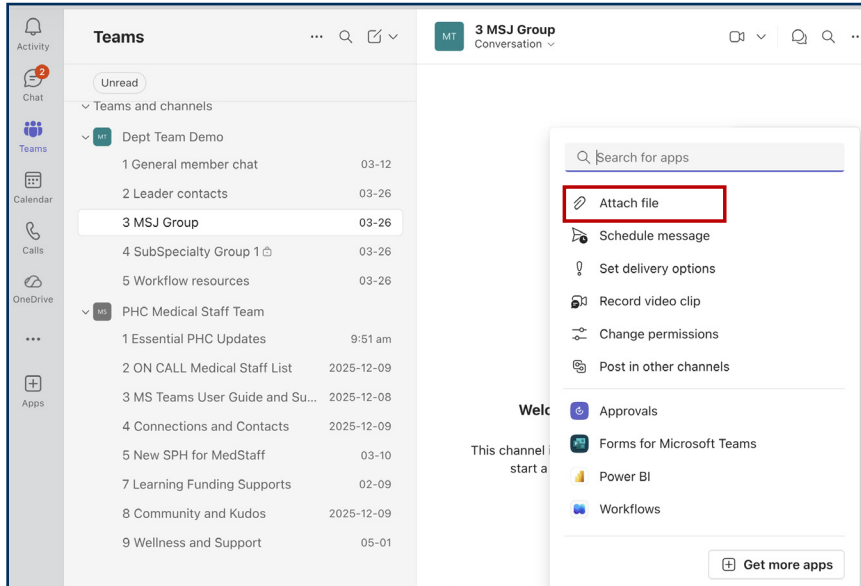


Phone Call: In a Teams chat look for the phone icon

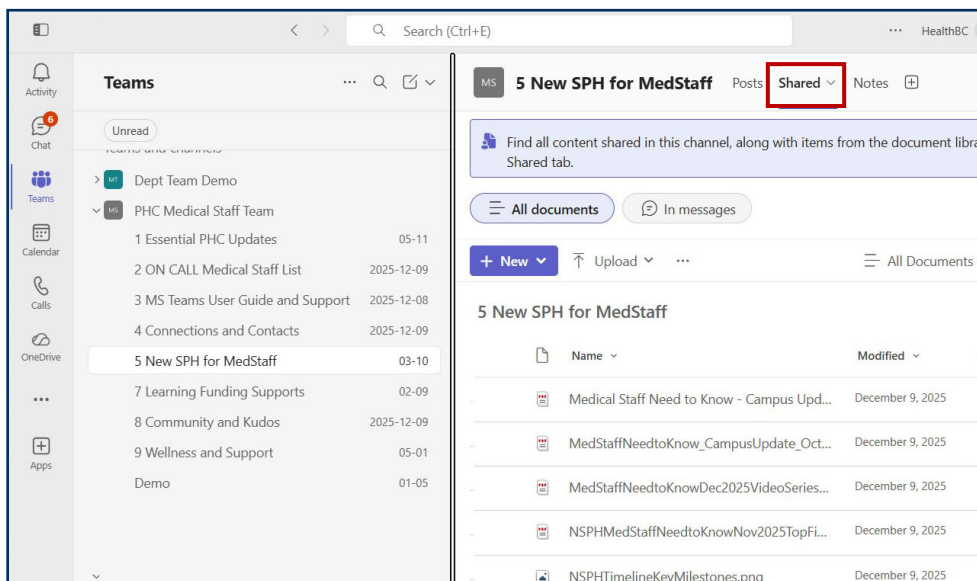


Open and share files in chats or channels

- **Click the link** to open a file shared with you
- **To share a file:** click the **+** sign in the chat window and upload from the choices listed



Find all files shared in a channel



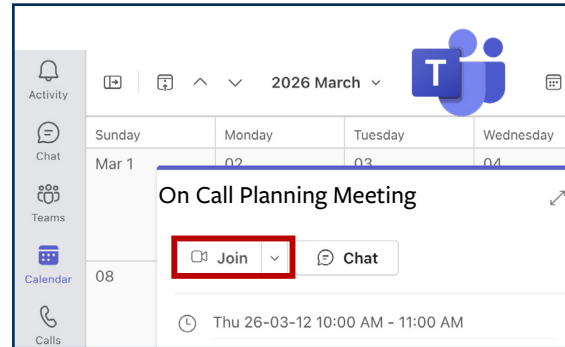
Files will automatically delete after 13 months

- To delete sooner, the file must be removed by the same person who posted it
- Transfer files you wish to retain to another secure file storage location

Join or schedule a meeting

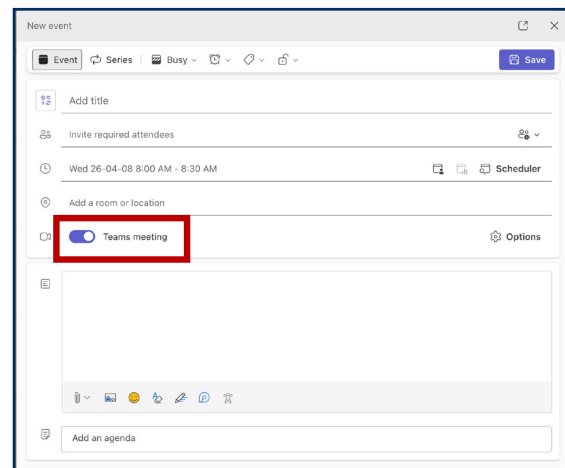
⚙️ Join a meeting from the MS Teams calendar or meeting invite

- From a **link**, or from the MS Teams or mobile **calendar**
- **Find your meeting and click JOIN**
- Review camera and microphone settings > Select **“Join now”**



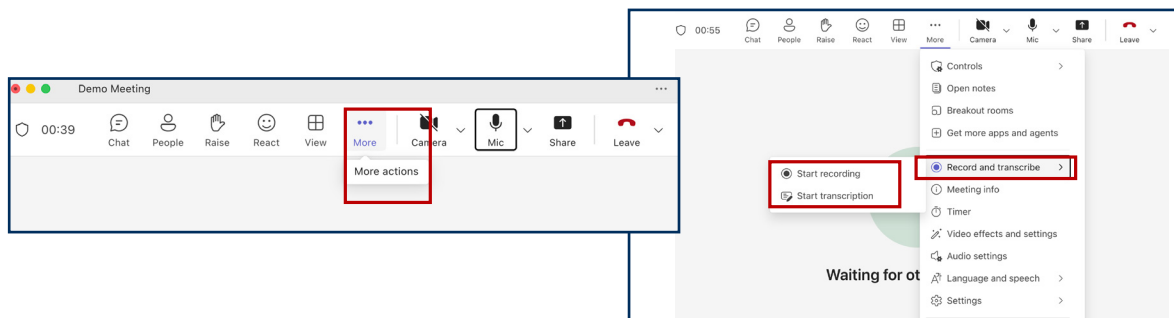
⚙️ Schedule a meeting

- On MS Teams, select **Calendar > new meeting** or **+ sign**
- Enter **Meeting details**: Title, Date, Time, Required or Optional Attendees
- – You can invite people from both PHC or non-PHC e-mail addresses
- The invitation will be sent from your PHC Outlook tied to your Teams
- **Toggle to MS Teams Meeting** to automatically add a **Teams joining link** > **Save**



⚙️ Record the meeting or run a transcript during a meeting

- **You can retrieve the transcript after the meeting and run it through the PHC version of Microsoft 365 Copilot** to create minutes or action items
- Copilot is the artificial intelligence approved by PHC: you must be logged into Copilot with your PHC credentials to use it for PHC work

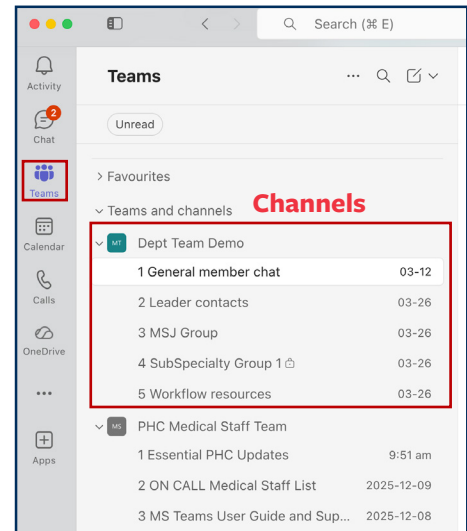


For channel owners

Set up your Team channels

Set up and customize your Channels

- **Set up channels** related to activities, discussions or groups relevant to your Department and that works best for your members
- **Name the channels** (e.g., On-Call Roster, resources, sub specialties)
- **Do not use any special characters in the channel name** such as *, - , !
- **Add a description to the channel** (optional)
- Choose a **channel type**:
 - **Standard** – Everyone on the Team has access
 - **Private** – Specific people only

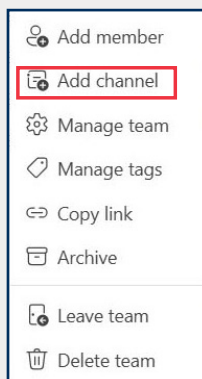


Computer

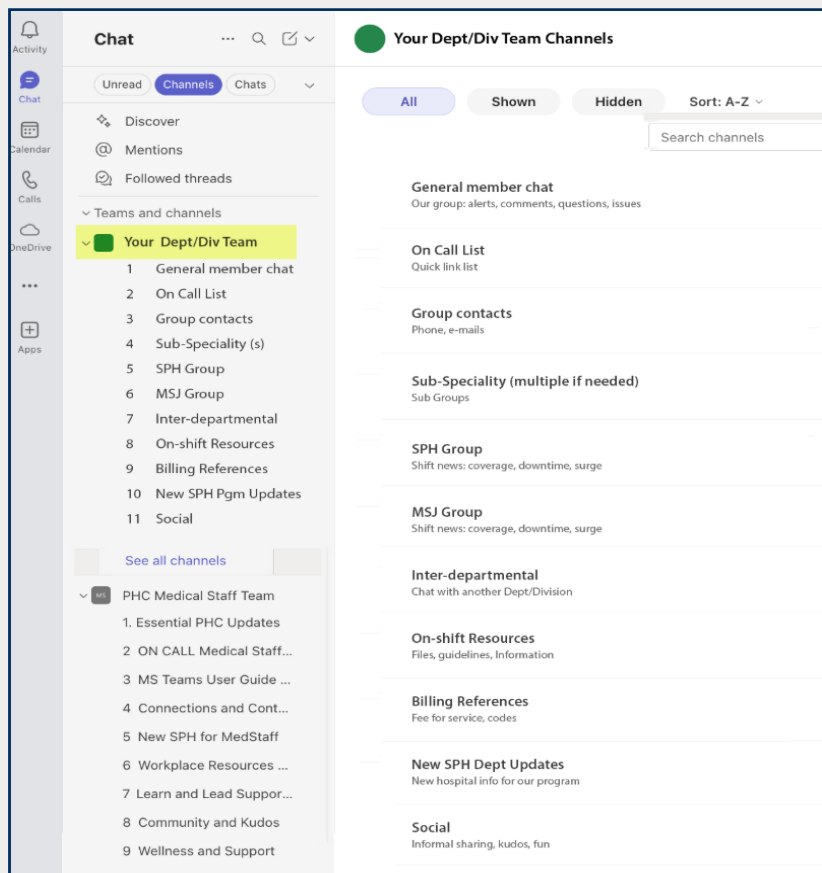
- **Open your Team**
- Select **more options** (⋮)
- Select **Add channel**

Mobile

- Open your Team
- Select **more options** (⋮)
- Select **Manage channels**
- Click the **(+)** sign to **Add Channel**



Examples of channels (idea starters)



For channel owners

Add Team members



Owners of the Team

- Add or remove members or owners
- Create, edit, and delete channels
- Manage Team settings: privacy, @mentions, moderation



Members of the Team

- Post messages and reply in channels
- Share files and collaborate
- Join meetings and conversations

Add more Team members

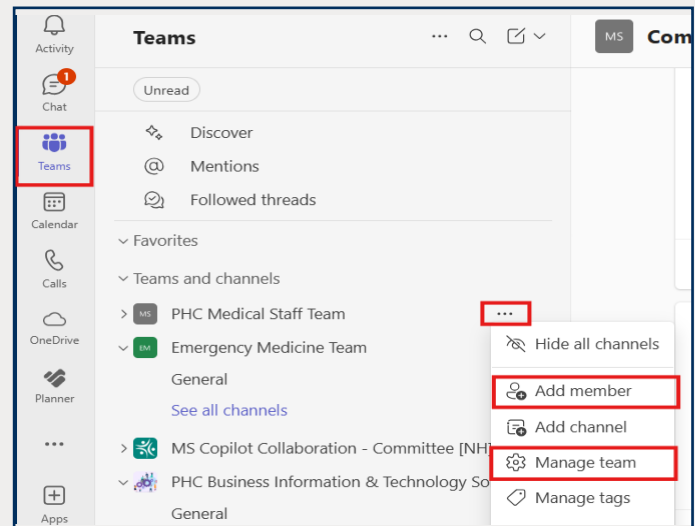
- **The Department Team owner can add new PHC medical staff and staff members**
- **You can invite members** from other Departments into your Team and channels, but be aware they can see your members' activities
- **If you need to communicate regularly with a number of individuals** who are not part of your Team, you may wish to create a separate **interdepartmental Team** (Request support on page 2 of this guide)

Computer

- On your Team name select More options (⋮)
- Go to **Manage Team > Members tab**
 - Enter their **name or email address**
 - **Assign a role** (Owner or Member)
 - Select **'Add'**

Mobile

- Select **More options** (⋮)
- Select **Manage Members**
- Select **(+)** sign to add Member
- Assign **Owner or Member** roles



For channel owners

Set up privacy for your channels

Public and private channels

All members of your Team automatically have access to your Team's public channels

You can also set up Private channels: members must already be part of the main Team; only channel owners can add new members to the private Team

Computer

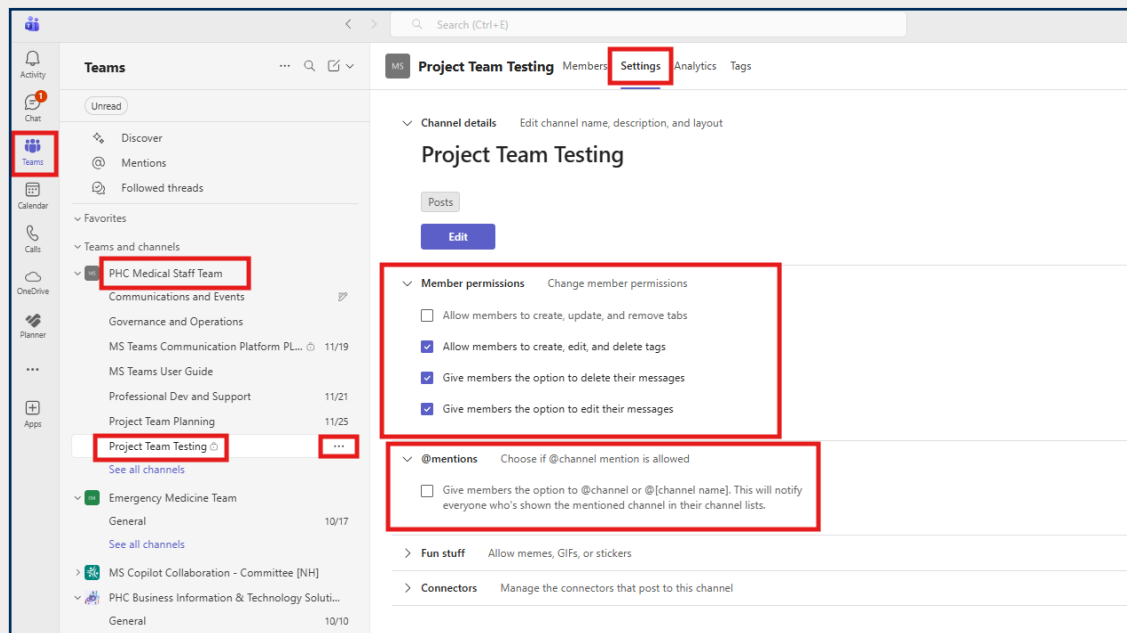
In your Team, select More options (⋮)

- Select **Manage team > Settings > Edit**
- Choose **Private or Public**

Mobile

In your Team, select More options (⋮)

- Select **Edit Team > Edit Details**
- Choose **Private or Public**



For channel owners

Configure @mentions

- Go to **Manage Team > Settings**
- Select **@mentions**
- **Choose who can use Team, Channel, and group mentions**
- Use **@Team** or **@Channel** for urgent communications

Important – Private Channels and @Mentions

- You can only @mention people who are members of the channel
- If a person is not a member of the private channel, their name will not appear as an option when using @mentions

Channel moderation for administrators and champions

Add owners and channel moderation for admins, champions

- **Add additional owners and moderators** to administer your Team, manage membership, sets posting preferences

Computer or Mobile

- **Select More options** (•••) next to the Team name
- Select **Manage channel**
- **Enable Moderation**
- **Assign moderators**