



**HFMA COVID-19 briefing**  
March 2020 (updated June 2020)



# Tips for using Microsoft Teams for meetings



## Introduction

Microsoft has announced that NHS staff can use Microsoft Teams for free during the Covid-19 pandemic. One of the features of Microsoft Teams is the ability to hold online meetings, with audio, video and screen sharing functionality.

The HFMA already uses Microsoft Teams to hold online meetings with its members. This briefing shares the tips the HFMA has developed to make sure meetings run smoothly. It covers:

- setting up a Microsoft Teams meeting
- chairing a Microsoft Teams meeting
- joining a Microsoft Teams meeting.

The CPD Standards Office  
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## Setting up a Microsoft Teams meeting

The person setting up the meeting should invite the attendees using Outlook calendar. Use the Microsoft Teams meeting button in the ribbon.

The meeting invite should include something like the following:

*Dear \*\*,*

*Please see [here](#) for the details for the \*\*\*\*\* virtual group meeting. This will be via Microsoft Teams. You will need to click on the link below “Join Microsoft Teams Meeting” to join the meeting. You do not need to be in Microsoft to use this. If the link opens in Internet Explorer, please copy and paste the link into another web browser e.g. Google Chrome, Firefox. This works best with headphones and a mic, as laptop mic and speakers are not always clear enough. I will send you a more detailed ‘how to’ guide about how to join the meeting in an email.*

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**Join Microsoft Teams Meeting**

[Learn more about Teams](#) | [Meeting options](#)

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Some organisations have an additional licence with Microsoft which means that the invite may provide a dial-in phone number for those attendees who do not have access to the internet. However, we would encourage attendees to access the meeting via the internet so that they can use the chat functions and see documents shared during the online meeting.

It may help if the person organising the meeting shares a ‘how to guide’ before the meeting, so that everyone is clear what to do. You might also want to offer attendees a test call in advance of the meeting to check that they can use the technology. The *How to guide* that the HFMA sends out to attendees is included at the end of this document.

## Chairing a Microsoft Teams meeting

From our experience so far, here are our tips for people chairing Microsoft Teams meetings.

### Test the software

Have a test call with someone who is experienced using the software. This gives you the opportunity to be familiar with all the functions of Microsoft Teams meetings.

Ensure the meeting organiser has checked that all meeting attendees are aware of how to use the software. This may involve providing them with the opportunity to test the software in advance of the meeting and sending them a how-to guide of how to use the software.

### Explain the features

Briefly explain all the features of the software at the beginning of the meeting or nominate someone in the meeting to do this. This reminds attendees how best to use the software and ensures everyone is on the same page.

### Agree ‘house rules’

Go through the ‘house rules’ at the beginning of the meeting. These might include:

- asking members to mute their microphone and only un-mute it when they need to speak. This will help prevent echoes and background noise

- encouraging attendees to use headphones which have a microphone or a headset. This allows the sound to be clearer
- encouraging attendees to have their camera on. It may mean people are less likely to try to do other things during the meeting or wander off! In May 2020, Microsoft began its roll out to enable of up to nine video streams at a time in meetings. There is a function in Microsoft Teams to allow you to blur the background , or choose from available images so only the person looking at the camera can be seen in focus
- coming up with a solution to prevent attendees speaking over each other (see below for a suggested approach).

## **Introductions**

When doing introductions at the beginning of the meeting, we find it works well if the chair or meeting organiser does a roll call and asks the attendees to introduce themselves. MS Teams has also recently added the function to get an attendance report. By selecting the show participants icon on the control bar and then the 'download attendee' option a report will be downloaded in a CSV file that can be opened in excel including the name, join time and leave time of meeting attendees.

## **Questions and comments**

Depending on the number of attendees, it can be useful to use the chat function to help the chair with questions and comments. Attendees can use the chat function to express their wish to comment and then the chair can invite individuals to speak. Alternatively, MS Teams also includes a new raise hand feature if you have a question or comment but do not want to interrupt the person speaking. You can select the hand icon in the control bar to place a gold hand icon on your video feed which lets the rest of the attendees, including the chair, know that you would like to speak. These approaches ensure that no one is missed and no one speaks over each other. Our experience is that it takes a little time for people to feel comfortable in this new meeting environment, so the chair needs to take a lead on supporting the discussion.

## **Making sure everyone's views are heard**

To prevent a potential issue of the same people talking in the meeting and others being quiet, you could name-check throughout the meeting, just to check that everyone who wants to comment has had the opportunity to do so.

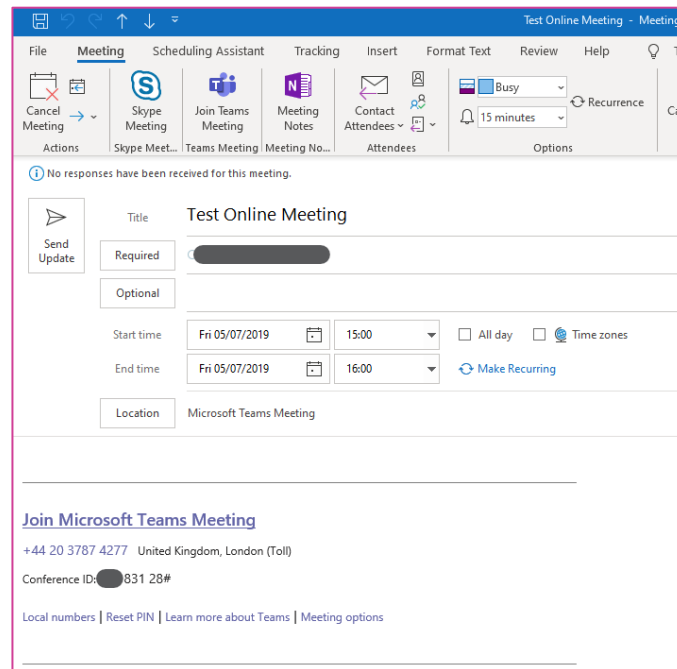
## **Improving future online meetings**

While still honing your online meeting skills, take time at the end of the meeting to make sure everyone was able to get the most out of the time spent together, and consider what measures could be taken to improve future online meetings.

# HFMA's how to guide for joining Microsoft Teams meetings

The following is the guide that we send out to attendees who are joining our online meetings.

This guide is intended to help you join a Microsoft Teams meeting online. If you have received a meeting request that contains a link 'Join Microsoft Teams Meeting' in it then you will be able to participate in the meeting remotely using your computer. Microsoft Teams is compatible with both Windows and Apple devices. The meeting request will look like the image below.



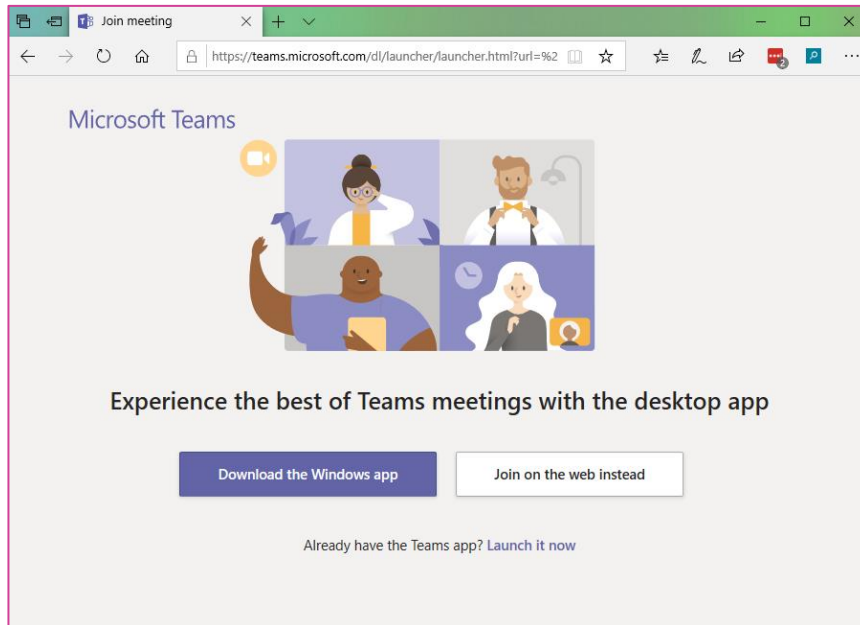
To join the meeting online using your computer, your computer must have a microphone and speakers. Most laptops will have these built in or you could also use a USB headset. A headset will have the added benefit of improved sound quality, especially in noisy environments.

Microsoft Teams is designed to work in a web browser without the need to download or install any software. You will need to use a modern web browser when joining the meeting, this includes Microsoft Edge, Google Chrome or Firefox. If you do not have access to these browsers, then you can install the Microsoft Teams app.

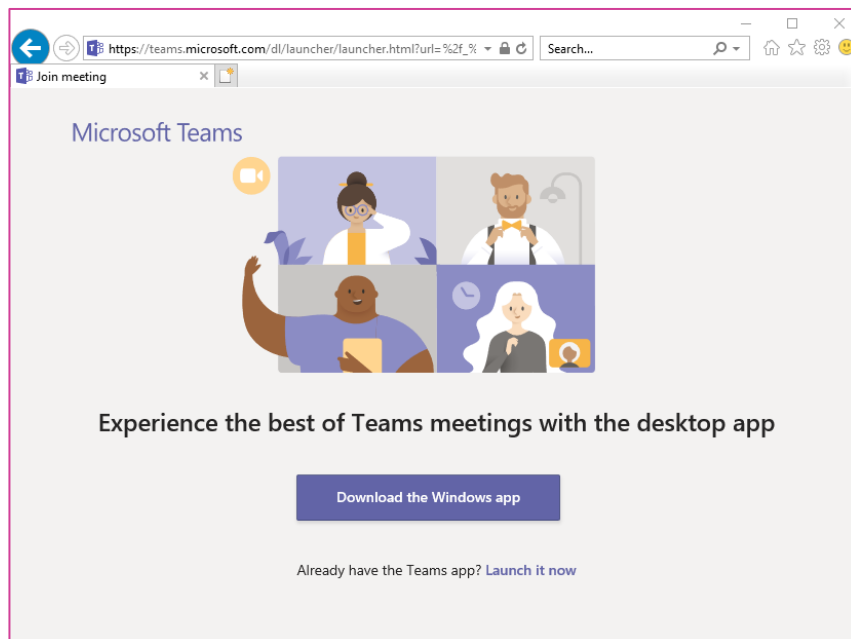
If Internet Explorer is set as the default browser, then you will need to get the link to the meeting and copy and paste it into another browser (Edge, Google Chrome, Firefox). To do this follow the instructions below.

**Right Click on the Meeting link → Choose 'Copy Hyperlink' → Paste link into your web browser**

You will be presented with a page like the one below (this example is Microsoft Edge). To join the meeting in the web browser, click on the white button. You can also download and install the Microsoft Teams app on your computer by clicking on the purple button if you have permission to do so.

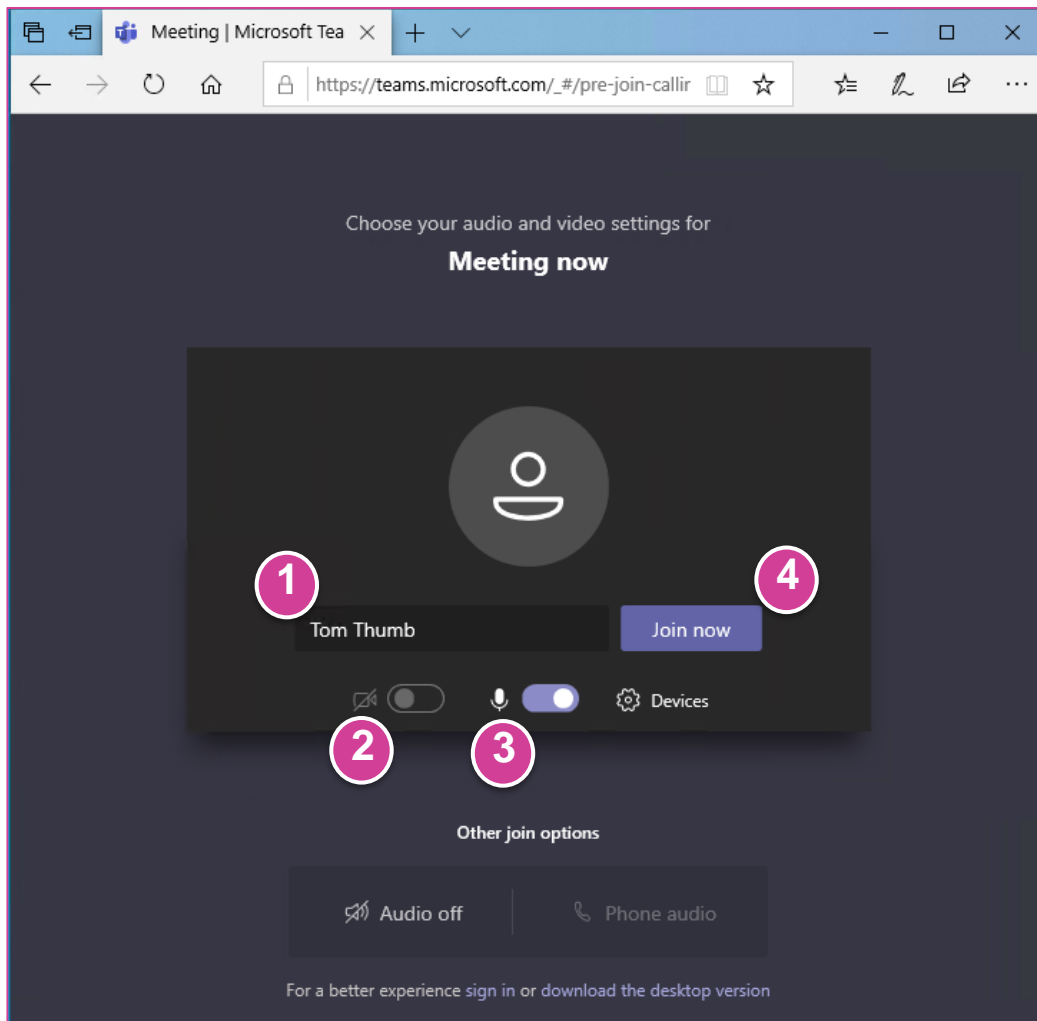


If you only have the option of Internet Explorer, then when you click on the link you will be presented with the screen below and you will need to install the Microsoft Teams app.



When you join a meeting in the browser you will get the screen below. Here you will need to:

1. Enter your name in the box
2. Turn on your webcam (if you have one available)
3. Turn on your microphone (if it isn't already switched on)
4. Press the 'Join now' button

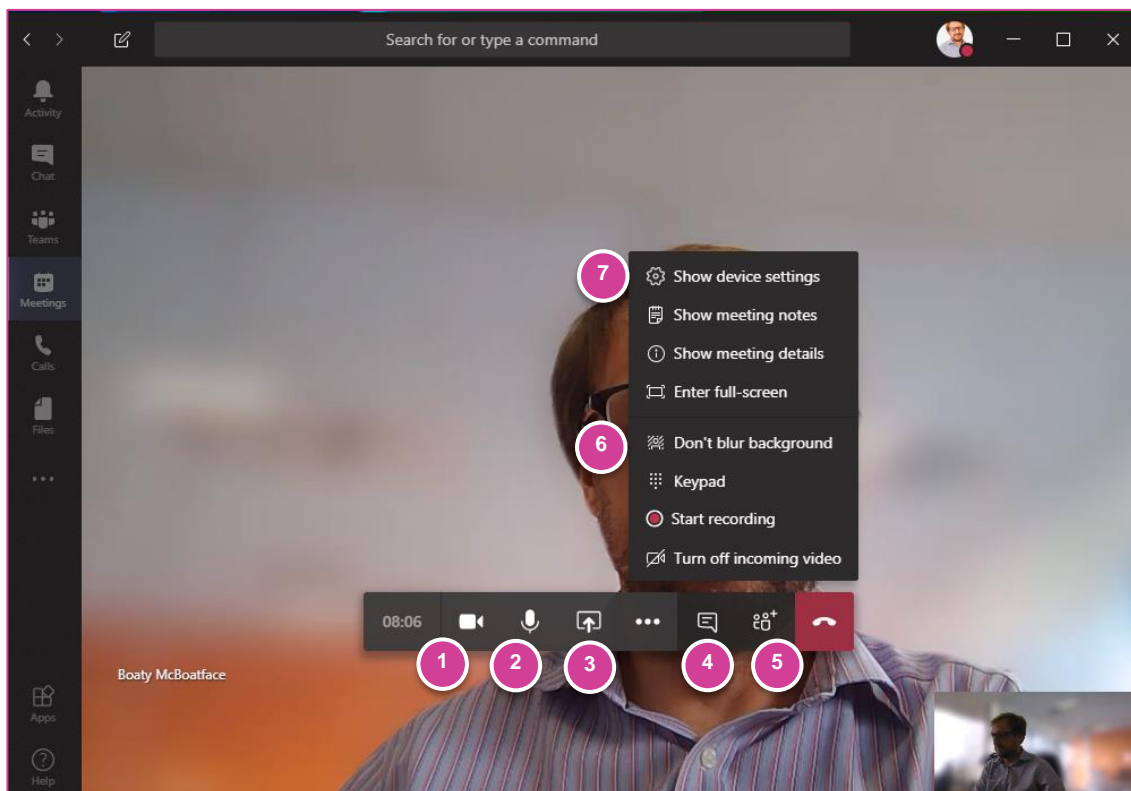


Once you are in the meeting, all the controls are accessible by moving your mouse over the video. To use all the features you should use the Microsoft Teams app. If you are using Microsoft Teams in the browser some features are not available.

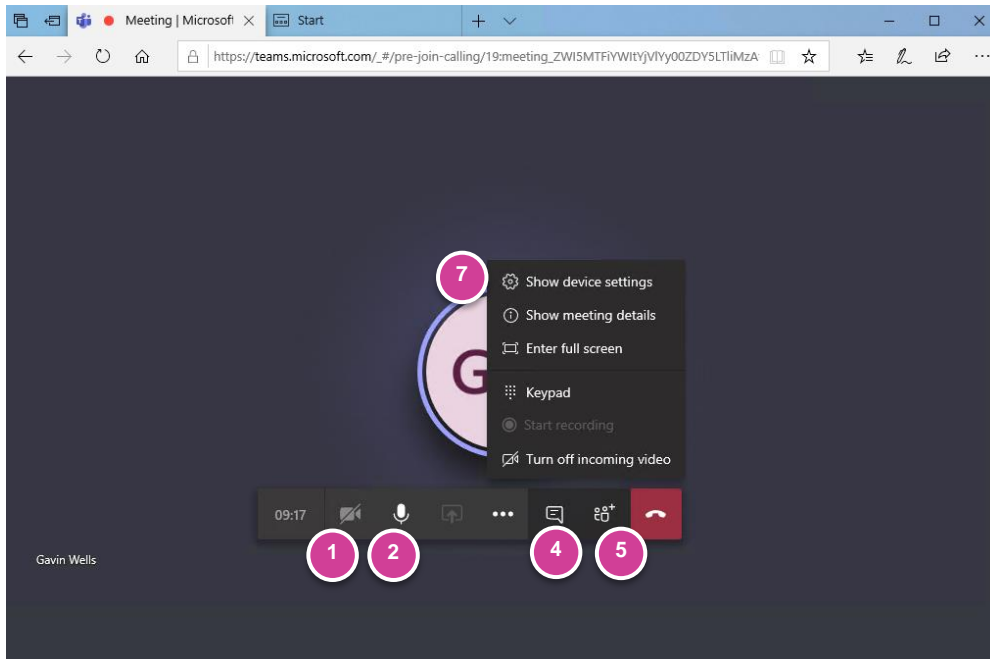
Below are the common controls in each.

Number	Control	Teams App	Teams in the Browser
1	Turning the camera On and Off	Yes	Yes
2	Muting the microphone	Yes	Yes
3	Sharing your screen, application or Whiteboard	Yes	No
4	Opening the text chat	Yes	Yes
5	Show participants	Yes	Yes
6	Blurring and unblurring the background	Yes	No
7	Changing your audio device i.e. switching to a USB headset	Yes	Yes

## Microsoft Teams App



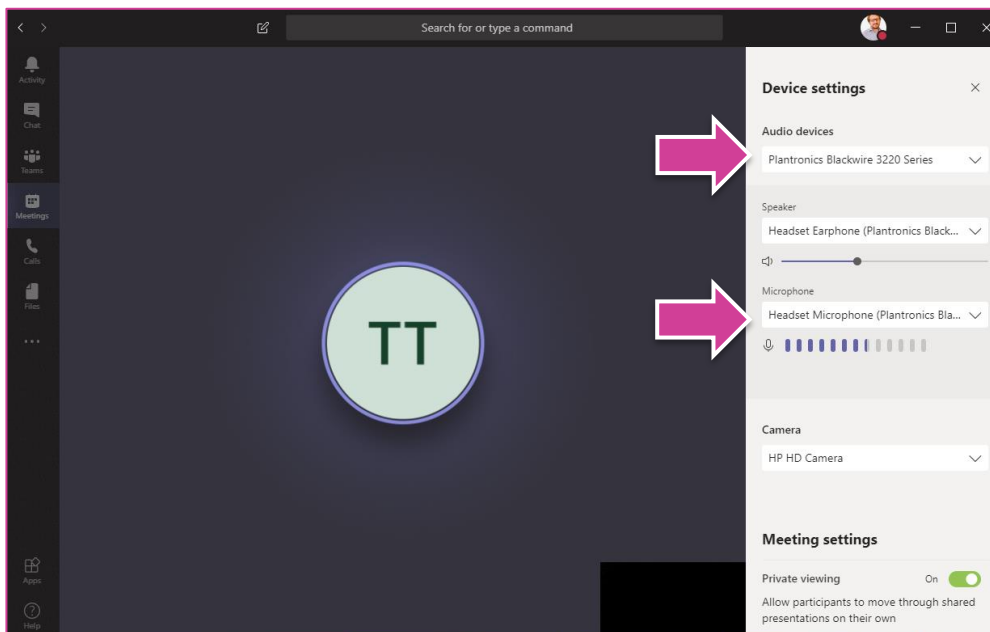
## Microsoft Teams in the Browser



## FAQs

**Q.** I can hear the other people in the meeting, but they can't hear me.

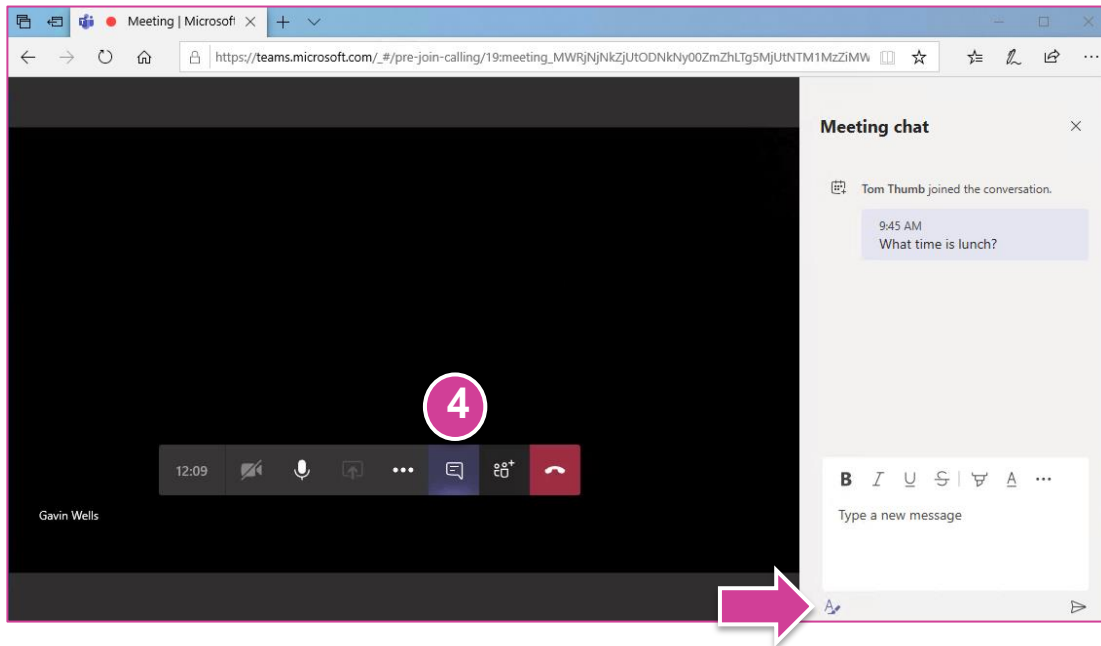
**A.** Go to 'Show Device Settings' (7) and check the microphone is selected and working.





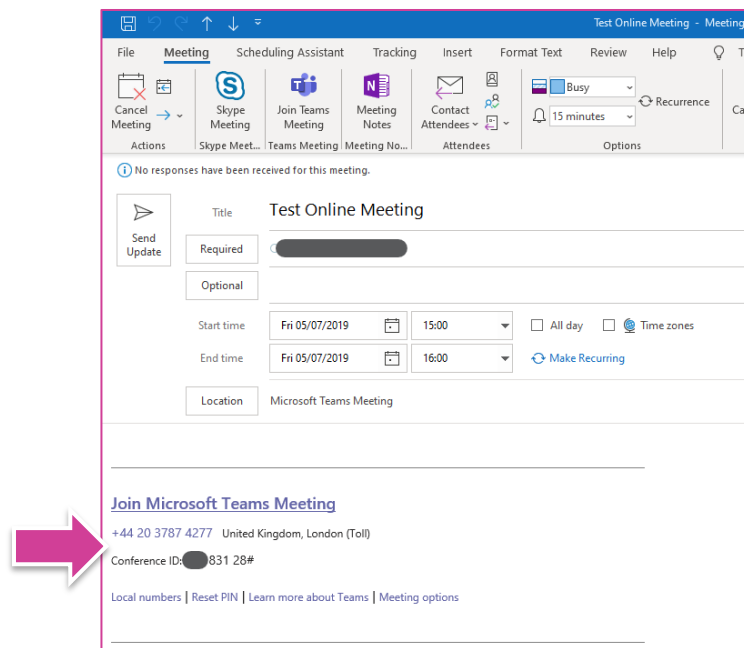
**Q.** How can I type a question into the meeting?

**A.** Open the chat window (4) and type your message into the box. If you need to format the text (make something bold etc) then click on the A symbol under the text input box.



**Q.** I can't use Microsoft Teams, can I still join the meeting remotely?

**A.** Yes, if the organizer of the meeting has added a dial in number you can use it to dial into the meeting using your phone. This will only give you audio into the meeting and if any documents are shared you will not see them. We recommend using the Microsoft Teams browser or desktop app whenever possible.



## About the HFMA

The Healthcare Financial Management Association (HFMA) is the professional body for finance staff in healthcare. For nearly 70 years, it has provided independent and objective advice to its members and the wider healthcare community. It is a charitable organisation that promotes best practice and innovation in financial management and governance across the UK health economy through its local and national networks.

The association also analyses and responds to national policy and aims to exert influence in shaping the wider healthcare agenda. It has particular interest in promoting the highest professional standards in financial management and governance and is keen to work with other organisations to promote approaches that really are 'fit for purpose' and effective.

The HFMA offers a range of qualifications in healthcare business and finance at undergraduate and postgraduate level and can provide a route to an MBA in healthcare finance. The qualifications are delivered through HFMA's Academy which was launched in 2017 and has already established strong learner and alumni networks.

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### HFMA

1 Temple Way, Bristol BS2 0BU

T 0117 929 4789

F 0117 929 4844

E [info@hfma.org.uk](mailto:info@hfma.org.uk)

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[www.hfma.org.uk](http://www.hfma.org.uk)