Microsoft Teams Meeting Tips and Considerations

Given the institution-wide transition from Zoom to Teams and the planned downgrade of many paid Zoom licenses to free/basic Zoom accounts by September 30, 2026, research teams should transition research activities to their Unity Microsoft Teams account. Zoom Basic accounts should not be used for research activities.

If the **only** change is replacing Zoom with Unity Microsoft Teams, this does not need to be submitted as an REB amendment. Make the change to your current REB-approved documents, retain the version date, and create a note to your study file indicating when and why the change was made. This change can then be included in your next REB amendment. Any other changes to study documents or study processes would require REB approval prior to implementation.

This document highlights tips and considerations for operationalizing Microsoft Teams based on our experience with Teams. As we continue to learn about Teams, additional information and guidance may follow about features that impact research. A Microsoft 365 Frequently Asked Questions has also been created and will be updated on an ongoing basis as new questions are received.

Institutional Microsoft Teams Resources

The M365 UnityNet page provides resources about the institution-wide Microsoft 365 rollout. Some available guidance in the Resources section and News and Updates section are highlighted below. It is recommended that all available resources developed by the institution to support the transition to M365 are reviewed.

- M365 UnityNet page -> Resources Section -> How to use Microsoft 365
    - Guides for all M365 tools, including Teams, are available here. This includes a Microsoft Teams Quick Start Guide, FAQs, and a Virtual Care Tipsheet. The Tipsheet includes recommended settings when configuring Teams for care appointments, which may also have applicable considerations for research.

- M365 UnityNet page -> News and Updates -> Latest News
    - All M365-related institution news and tips are posted here. This includes instructions on how to access Teams meeting options, create meeting transcripts, etc.

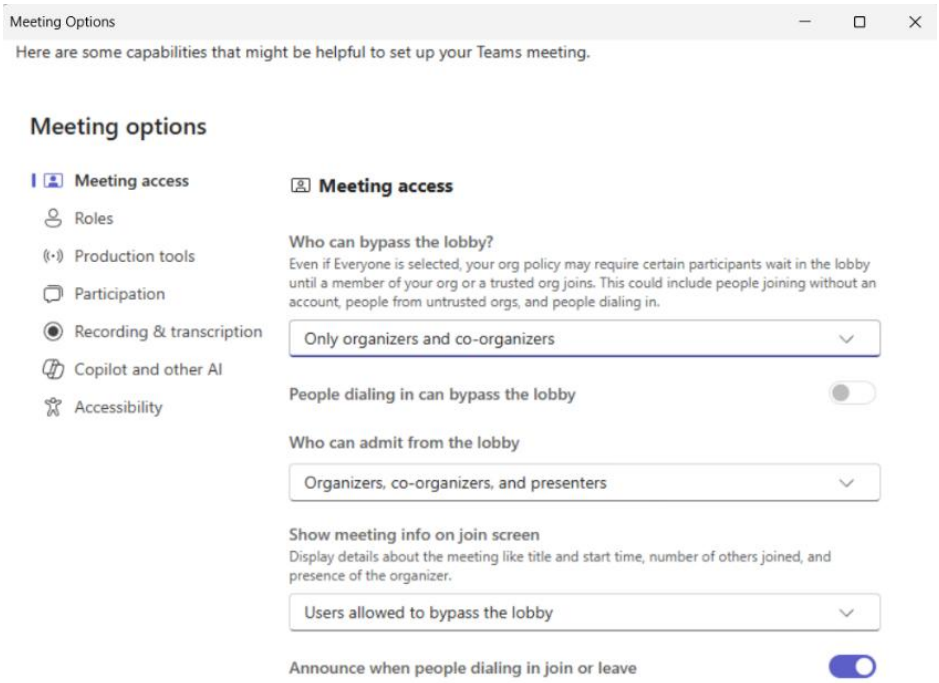
Security Considerations – Meeting Lobby

To maintain control of who is admitted to the meeting and to reduce the risk of unintended participants joining the meeting, consider having participants wait in the lobby until the research team opens the meeting and admits participants.

To change this setting, go to the Meeting Options menu -> Meeting access. Under 'Who can bypass the lobby', select 'Only organizers and co-organizers'. With this setting in place,

participants will remain in the lobby until an organizer or co-organizer from the research team admits them into the meeting.

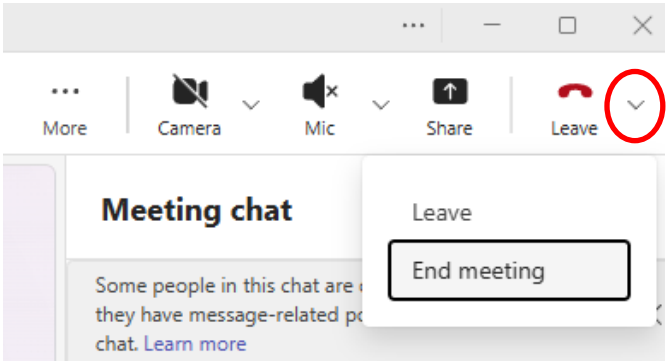
Once a participant has been admitted from the lobby to the meeting, they cannot be moved back to the lobby.



Security Considerations – Ending the Meeting

As the organizer, selecting 'Leave' removes you from the meeting, but the meeting remains open until the last participant leaves the meeting. To ensure the meeting does not remain active after the research team leaves, select 'End meeting' instead.

To end the meeting for all participants, select the dropdown arrow beside Leave, and then select End meeting.

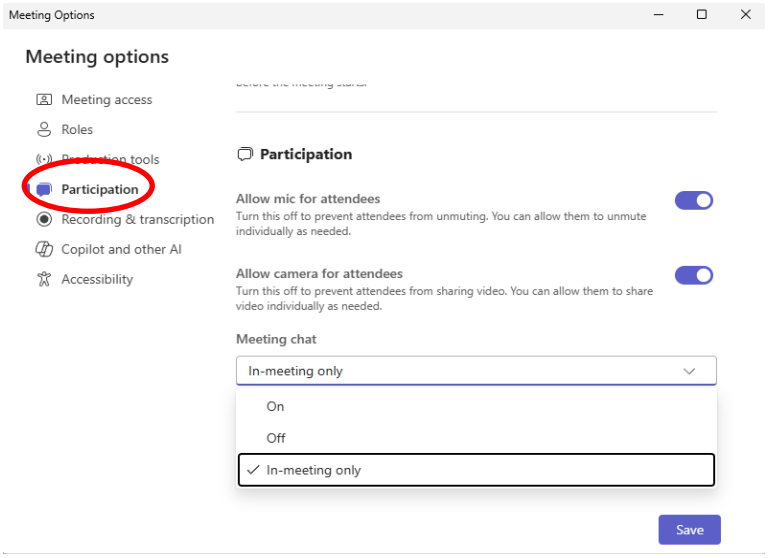


Confidentiality Considerations – Meeting Chat

Meeting chat settings can be changed in the Meeting Options menu -> Participation.

There are three settings for Teams meeting chats:

- **On** – This is the default setting. This is a continuous meeting chat that participants may continue to access and use in the Teams application (if signed in to a Teams account) after the meeting.
- **Off** – This setting disables the chat function completely.
- **In-meeting only** – Chat is available only during the meeting. Participants cannot send new chat messages after the meeting has ended, though messages sent during the meeting may remain visible in the Teams application (if signed in to a Teams account).



If Meeting Chat is set to 'On' or 'In-meeting only', participants who join while signed in to a Teams account may retain access to the meeting chat after the meeting ends. Participants who join anonymously through a web browser or Teams application without signing in to a Teams account, cannot access the chat once the meeting has ended.

If the chat function is used, participants should be informed that anyone who joined the meeting using a Teams account may retain the chat messages. Therefore, consider limiting the use of identifiable and/or sensitive information because the research team cannot control participant access to it after the meeting ends.

A persistent 'Join' button may remain in the Teams application meeting chat even when the chat is set to 'In-meeting only'. Participants should be informed that this button is not a reliable way to contact the study team and to use the contact information provided in the consent form instead.