



How to Set Up Intake for Telehealth: **Microsoft Teams**

Phreesia recommends using Microsoft Teams for online conferencing because the platform is HIPAA-compliant and meets numerous compliance standards, including HITRUST, SOC 1, SOC 2 and GDPR. It also supports dynamic links that are unique to each appointment.

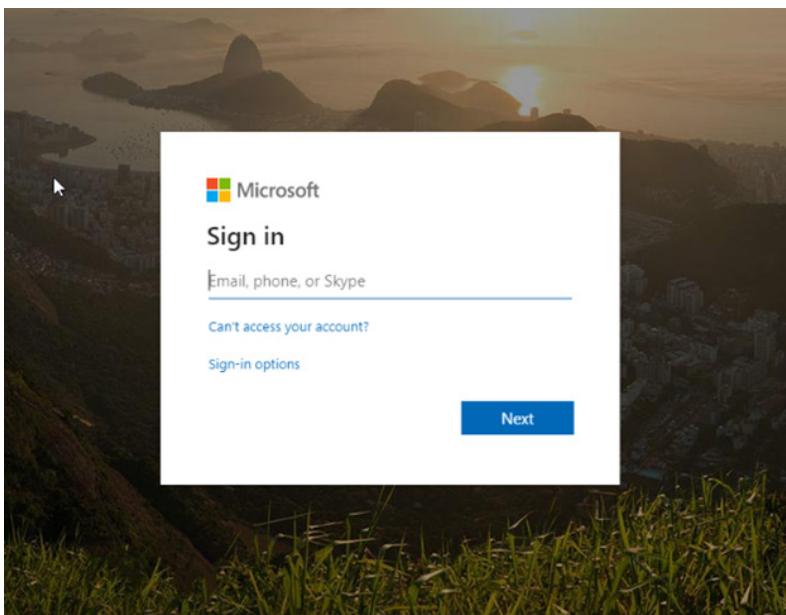
Set Up Instructions

Step 1 - Grant Phreesia access to create meetings.

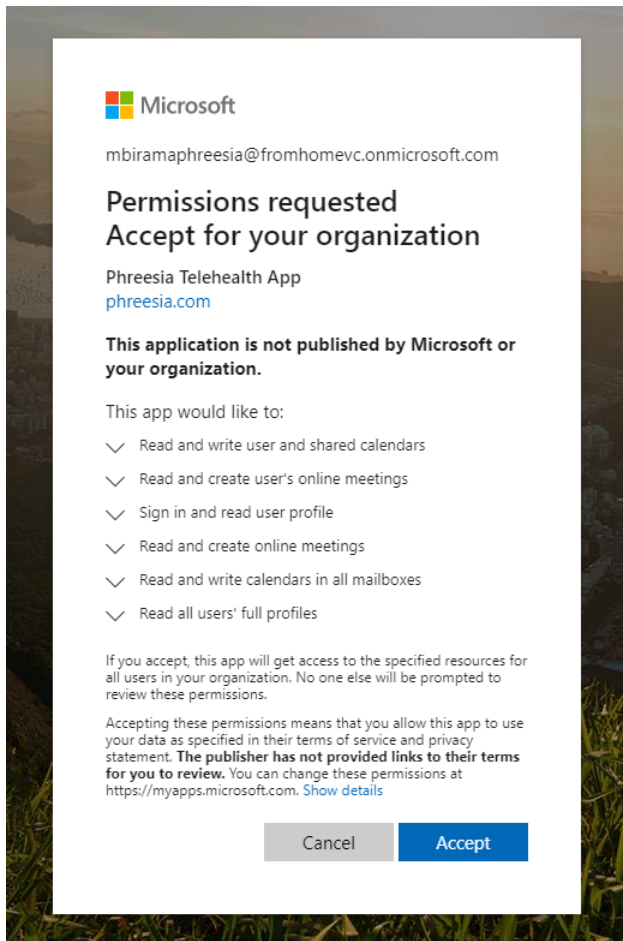
Your organization's IT or Network Administrator will need an Admin Consent URL link to apply to your Active Directory or Office 365 environment. To obtain an Admin Consent URL, submit a case that includes your organization's TenantID.

Step 2 - Grant application delegation permissions to the Phreesia app in Azure.

1. Click the Admin Consent URL and enter your credentials to authenticate. You will be redirected to authenticate on the Microsoft screen.



2. Read the Permissions Consent and click Accept.



You will be redirected to the Phreesia homepage.

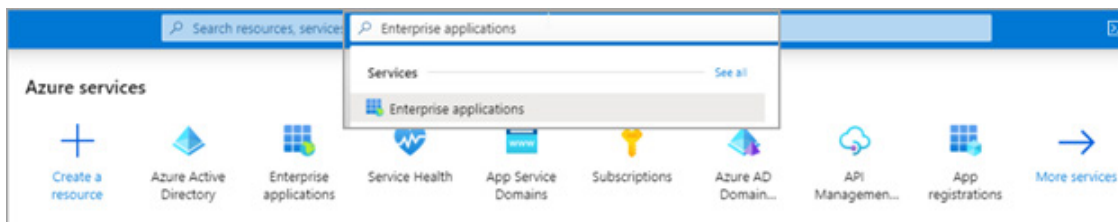
Note: This step may take a few seconds to complete.

Step 3 - Verify that the Phreesia App was successfully installed.

1. Navigate to the Azure Portal Main Page: <https://portal.azure.com/#home>.

2. Locate the Azure Services section, and click Enterprise Applications.

Tip: Search for Enterprise Applications as needed.



A list of applications will display.

3. Identify the application labeled Phreesia Telehealth app.

If you do not see the Phreesia Telehealth App, please contact Phreesia Support.

Step 4 - Recommended Settings Setup

Phreesia recommends configuring Teams to the settings listed below.

Meeting Policies

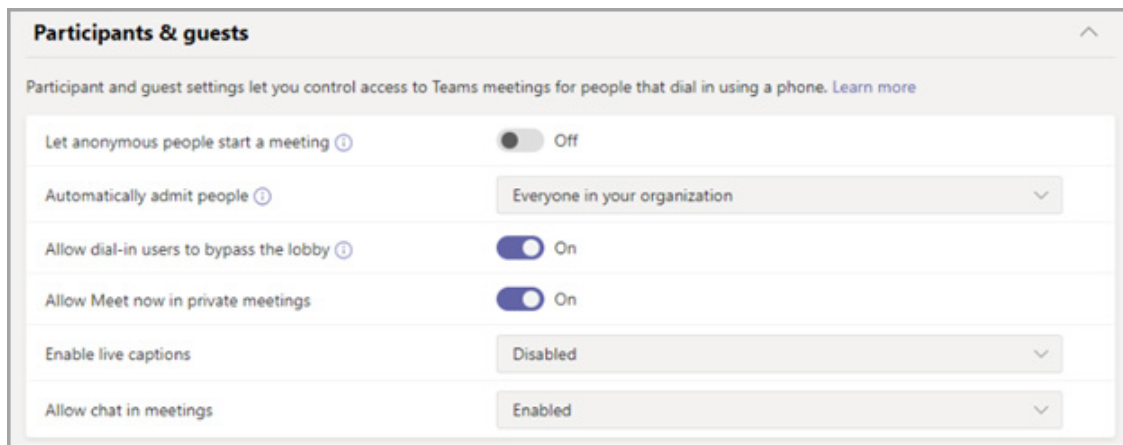
The Microsoft Teams Admin Center gives you the flexibility to create, edit and apply meeting policies specific to your organization and/or providers. Phreesia recommends reviewing and editing the policies to align with your organization's existing policies and workflow.

Waiting Room

Patients or external participants can join the meeting after someone from your organization (normally the MA or provider) grants them permission.

Participant and Guest Settings

- Allow anonymous people to start a meeting – *Off*
- Automatically admit people – select “*Everyone in your organization*”
- Allow dial-in users to bypass the lobby – *On*
- Chat in meetings – *Enabled*



Tip: Hover over the info icon for more information about the setting and how it applies to your organization.

Safe Guardian

Navigate to Org-Wide Settings, and access the External Access section. The recommended settings below can help prevent patients from accessing your MAs and provider's direct contact information.

Note: By turning this feature off, your staff can join calls and web conferences as “guests” with participants (non-patients).

- Users can communicate with other Skype for Business and Teams users – *Off*
- Users can communicate with Skype users – *Off*

External access

External access lets your Teams and Skype for Business users communicate with other users that are outside of your organization. By default, your organization can communicate with all external domains. If you add blocked domains, all other domains will be allowed but if you add allowed domains, all other domains will be blocked. [Learn more](#)

Users can communicate with other Skype for Business and Teams users Off

Users can communicate with Skype users Off

FAQs

Which version of Teams does Phreesia Intake for Telehealth support?

Phreesia can support the Premium and Essentials versions of Teams. Please review Microsoft Teams to determine the plan that best aligns with your organization's needs.

Where can I go to learn more about using Microsoft Teams?

Check out the following pages for more information:

- [How to add audio conferencing to existing subscriptions](#)
- [FAQs about audio conferencing](#)

How do you revoke permission?

1. Navigate to the Azure Portal Main Page: <https://portal.azure.com/#home>
2. Locate the Azure Services section and click Enterprise Applications.
3. Click the application labeled Phreesia Telehealth App.
4. Navigate to the Properties tab.
5. Click Delete.
6. Click Yes to confirm deletion.

The screenshot shows the Azure Portal interface for Enterprise Applications. The left sidebar contains navigation options like Overview, Diagnose and solve problems, Manage, Security, Activity, and Troubleshooting + Support. The main content area displays a list of applications with columns for Name and Homepage URL. The 'Phreesia Telehealth Test App' is highlighted in yellow.

Name	Homepage URL
Graph explorer	https://developer.microsoft.com/en-us/graph/graph-explorer
Microsoft Teams	
Office 365 Exchange Online	http://office.microsoft.com/outlook/
Office 365 Management APIs	
Office 365 SharePoint Online	http://office.microsoft.com/sharepoint/
Office 365 Yammer	https://products.office.com/yammer/
Outlook Groups	
PHR_Test_Federated	
Phreesia Telehealth Test App	
phreesiaVC_sample	
Power BI Service	
Skype for Business Online	