

CE/CME & PHI Teams Meeting Requirements

These requirements apply to the following meeting types:

All CE/CME-accredited meetings (i.e., those with a CME event code)

All meetings that include patient information (such as M&M conferences and case discussions)

⚠ IMPORTANT: *Microsoft Teams does not retain meeting settings by default, so you must manually configure them each time for meetings in the specified categories.*

1. Create the Meeting

Use Outlook or the Teams Calendar.

Click “New Meeting” and fill in:

- Title
- Date and Time
- Attendees
- Meeting details (agenda – do not include CME event code or PHI in meeting invite)

2. Add a Co-Organizer

After saving the meeting, reopen it.

Click the “Meeting Options” link (in the calendar invite or Teams).

Under “Choose co-organizers”, select one or more people from your organization.

Co-organizers can help manage the lobby, chat, and participant controls.

3. Restrict Chat to “Only During the Meeting”

In Meeting Options, set “Allow meeting chat” to “Only during the meeting.”

⚠ Why This Matters:

- Prevents PHI (Protected Health Information) from being shared or lingering after the meeting.
- Ensures CME event codes are only visible during the session.
- Supports HIPAA compliance and CME accreditation rules.

4. Require External Participants to Wait in the Lobby

In Meeting Options, set:

- “Who can bypass the lobby?” → People in my organization

This ensures anyone outside HHC (Hartford HealthCare) should be admitted manually.

5. Display Full Names in the Meeting

All attendees must ensure their first and last names are visible on screen.

This is crucial for meetings involving patient discussions to verify attendance and maintain accountability.

Organizers should remind participants to update their display names before joining.

6. Final Reminders for Organizers

Review all settings before sending the invite.

Include a note in the invite:

- Chat will only be available during the meeting.
- External guests will be admitted manually.
- CME codes will be shared only during the live session.

Monitor the lobby and chat during the meeting.