EMPLOYMENT CONNECTIONS MS TEAMS: QUICK REFERENCE TABLE

The table below provides a visual outline of the approved and prohibited MS Teams functions, while engaging customers (external):

FUNCTION	EC STAFF (ORGANIZER)	CUSTOMER (ATTENDEE)	NOTES/CONSIDERATIONS
TEAMS MEETING (INVITATION SENT BY EC EMPLOYEE)	✓	✓	▪ Teams Meetings are the only approved method of engaging with customers through Teams ▪ ***MEETING:*** *Invitation sent from EC staff to the customer for a specific date and time*
SENDING MEETING INVITE	✓	✗	▪ Teams meetings, with external customers, must be set up and sent by EC staff, to keep safeguards in place ▪ If this is not followed, unauthorized Teams functions are given to the customer
VIDEO CALLS (VS. MEETING)	✗	✗	▪ All communications with customers, through MS Teams must occur during a scheduled meeting ▪ Making a video call, directly to the customer outside of a pre-scheduled meeting, is prohibited ▪ *Video calls provide unauthorized Teams functions to the customer*
AUDIO CALLS (VS. MEETING)	✗	✗	▪ All communications with customers, through MS Teams must occur during a scheduled meeting ▪ Making an audio call, directly to the customer outside of a pre-scheduled meeting, is prohibited ▪ *Audio calls provide unauthorized Teams functions to the customer*
CALLING CUSTOMER INTO MEETING (USING DIALPAD IN SCHEDULED MEETING)	✓	✗	▪ From within a scheduled Teams Meeting, you may use the "Call Me" function, to call a customer's phone (if they are unable to join the Teams Meeting with their intended device) ▪ *The customer will be limited to standard phone call options and will appear as though they called in to the meeting*
CHAT	✓	✓	▪ The Chat function is approved for transitory dialog, BUT ▪ All Chat conversations must be properly saved within your Case File in ETO, by following the **"Wrap Up Your Meeting"** reference tool
ATTACH FILE (INTO CHAT)	✗	✗	▪ Documents must not be attached, uploaded, or shared via chat ▪ Customer should send/share documents, by following existing and established EC procedures
PRESENTING DESKTOP	✓	✓	▪ Both may use this function ▪ *Caution should be used regarding what is visible, on both sides*
REQUEST CONTROL (OF CUSTOMER'S COMPUTER)	✓	✗	▪ When the customer presents their screen, the "Request Control" option will appear ▪ EC staff may use this option, to navigate the customer's screen, document, or for website navigation support
GIVE CONTROL (TO CUSTOMER)	✗	✗	▪ Once EC staff present their screen, the customer may be able to "Request Control" of their desktop/screen ▪ **THIS IS STRICTLY PROHIBITED**
RECORDING A TEAMS MEETING	✗	✗	▪ While this functionality is available to EC teams it is not to be utilized ▪ **STRICTLY PROHIBITED**
MS TEAMS CHANNELS	✗	✗	▪ The use of channels is prohibited for external customers
TRANSCRIPTS	✗	✗	▪ The transcript function should not be utilized ▪ If special permission is given, due to customer accessibility needs, they must be fully saved in the Case File, within ETO, by following the **"Wrap Up Your Meeting"** reference tool