Ottawa Health Science Network Research Ethics Board (OHSN-REB) /
Conseil d'éthique de la recherche du réseau de science de la santé d'Ottawa (CÉR-RSSO)

Instructions for Use of Microsoft Teams Meeting Chat to Send/Receive Documents

Introduction

With REB approval, documents can be sent to the potential/existing participants during a virtual meeting in MS Teams via the meeting conversation/chat. Potential/existing participants can also return documents to the study team this way.

This is only considered **a partial Secure File Transfer (SFT) method**; documents shared through the chat must be deleted from the chat and stored in the study team's MS Teams or SharePoint site. As such, best practice is to send/receive documents via one of the fully SFT methods (e.g.: Microsoft 365 SharePoint/ OneDrive link); the Microsoft Teams Meeting Chat should only be utilized if the other fully SFT methods are not feasible.

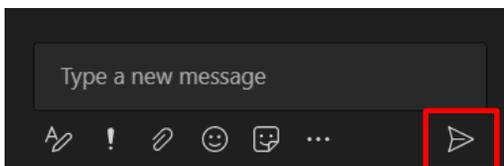## Sending Documents Through MS Teams Meeting Chat

1. In the header of the meeting, click **Show conversation**:

2. Type a message into the meeting chat that opened on the left of the screen and attach a document by clicking **Attach files**:
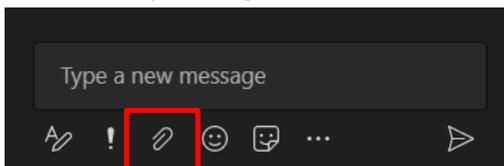
3. Click **Send:**

4. Once the message has been sent, everyone in the meeting will be able to download the document. Inform all attendees that the document will be deleted once the meeting has ended therefore they should download it right away.

      ✓ If sending a consent form, the potential participant can download, print, sign, scan and send the signed consent form back to the study team via the meeting chat.

5. ⚠️ **IMPORTANT** **Immediately after the meeting has ended, delete all files from the meeting chat, as per TOH Privacy Office requirements.**

Receiving Documents Through MS Teams Meeting Chat

1. When receiving documents through the meeting chat, they must be **downloaded** and **saved** into the secure electronic study file (i.e.: in Microsoft Teams or SharePoint). It is not recommended that study files be stored in OneDrive, as they would then only be accessible to the individual whose OneDrive it is and not all applicable study team members.

2. ⚠️ **IMPORTANT** **Immediately after the meeting has ended, delete all files from the meeting chat, as per TOH Privacy Office requirements.**