**NOTE:** This checklist was developed by Savannah River Nuclear Solutions (SRNS) Site Training to assist instructors in their conduct of virtual training via Microsoft TEAMS. As such, some aspects of this checklist may be unique to Savannah River Site.
If you have questions about this checklist, please contact David Hoel, SRNS, at David.Hoel@SRS.gov.

1. **INVITATION:** (See example at [**Attachment 1**](#Attachment1))\*

□ Obtain a class roster (from registrar) at least 2 business days before class

□ At least 2 business days before class, SEND TEAMS meeting invitation via Outlook (**Note:** Using Outlook enables adding attachments to the invitation.)

□ Click the “Response Options” drop-down menu and **turn off** (i.e., uncheck):

**Ø** Allow New Time Proposals
**Ø** Allow Forwarding

□ Attach:

* Student Handout(s) (if any)
* Evaluation Form (electronically fillable) (Example at **Attachment 2**)

□ Add any participants to the invitation who may have registered after the initial invitation.

# **BEFORE TEAMS MEETING:** (Optional)\*

□ Check roster & “Tracking” in invitation menu bar to see who has “accepted.”

□ Send reminder (to those with “none” response) to **accept** invitation (this automatically places the class event on the student’s Outlook calendar).

□ If new to presenting on TEAMS, practice before-hand.

# **DAY OF TEAMS PRESENTATION:**

□ Add Safety Topic to presentation (optional)

□ Open PowerPoint file & play Slide Show (NOTE: using .pdf copy may reduce lag issues)

# **JOIN MS TEAM MEETING:**\*

□ Add welcome message in Chat window (see **Attachment 3**)

□ “Share content” using PowerPoint Slide Show or .pdf copy
□ Add any necessary handouts in Chat window (optional)

□ Verify settings in TEAMS meeting options:

* Always let callers bypass the lobby (i.e., allow **everyone**)
* Announce when callers join or leave (turn **off**)
* Who can present - Choose “Specific people” (**any other instructors**) from the list of invitees who may be presenters. Everyone else will join as attendees.
* Allow camera for attendees? (Optional)
* Allow meeting chat (**enable**)
* Allow reactions (turn **on**)

□ Arrange monitor screens (optional – assumes presenter is using
2 monitors):

* Notes & TEAMS view (& other background files) on one side
* PowerPoint slide on other side

□ Use standard Chat messages, as needed (optional) (see **Attachment 3**)

# **BEFORE LEAVING TEAMS MEETING:**\*

□ Attach Evaluation Form to Chat window and provide e-mail address

□ Download TEAMS roster of participants for *Activity Sign-In Sheet*:

* Click on Participants icon 
* Click on the ellipse 
* Select ****
* Access Downloads Folder and save the Excel attendance list (you can convert to a .pdf if desired).

# **AFTER CLASS:**

□ Use MS TEAMS participant list to verify attendance for the official class roster\*

□ Send completed official roster to Site Training for processing\*

□ Prepare Summary of Evaluations\*

**ATTACHMENT 1**

**Typical Outlook/TEAMS Invitation**

**REQUIRED PARTICIPANTS:** Registrant Names

**OPTIONAL PARTICIPANTS:** Meeting Organizer/Chat Monitor\*

**SUBJECT:** Course Title (Course Code)

**LOCATION:** Microsoft TEAMS Meeting

**Please ACCEPT this invitation** for the subject training to get it added to your calendar.

**Instructor:** Name(s)

The class is being held **online via Microsoft TEAMS**,\*\* **not in a classroom**

In preparation for this class, please review the attached reference material and have it
available on your desktop or in printed format for the training session:

* Student Handout(s)
* Evaluation Form

\*\*For best results in this online Microsoft TEAMS Meeting:

* Please use a computer to view this course instead of an iPhone/Pad. We recommend you use a computer equipped with two monitors.
* Verify that your computer camera and microphone (if allowed) are turned on.
* If you have an operational microphone and speaker on your computer, you
do not need to use the TEAMS call-in phone number provided below.

**DO NOT FORWARD THIS MEETING INVITATION OR ATTACHMENTS.
THIS TEAMS MEETING INVITATION IS ONLY FOR REGISTERED PARTICIPANTS.**

**(If you’re going to record, add the Notice in Attachment 3)**

**ATTACHMENT 2**

**Example Evaluation Form**\*

(use fillable .pdf version)

|  |  |
| --- | --- |
| Course Title:  | Code:  |
| Instructor(s):  | Date:  |
|  |
| **Directions:** Mark the number which best measures how you feel about this training. Elaborate on any of your ratings in the spaces provided at the bottom. |
|  |
| **Objectives/Purpose** |
| Clear | ⑤ | ④ | ③ | ② | ① | Vague |
| **Content** |
| Valuable | ⑤ | ④ | ③ | ② | ① | Worthless |
| Complex | ⑤ | ④ | ③ | ② | ① | Simple |
| Too Long  | ⑤ | ④ | ③ | ② | ① | Too Short |
| Applicable | ⑤ | ④ | ③ | ② | ① | Irrelevant |
| **Instructor(s)** |
| Knowledgeable | ⑤ | ④ | ③ | ② | ① | Uninformed |
| Organized | ⑤ | ④ | ③ | ② | ① | Disorderly |
| Engaging | ⑤ | ④ | ③ | ② | ① | Boring |
| **Audio/Visuals** |
| Enhancing | ⑤ | ④ | ③ | ② | ① | N/A | Distracting |
| **Handouts** |
| Useful | ⑤ | ④ | ③ | ② | ① | N/A | Unnecessary |
| **Overall Rating** |
| Excellent | ⑤ | ④ | ③ | ② | ① | Poor |
|  |
| **Would you recommend this training to a colleague?** 🡪 | Yes | No |
| **Please Elaborate** (use back if needed)**:** |
| **A. What did you like best about this training?** |
| **B. Suggestions for improving this training:** |
| **C. Suggestions for other training topics:** |
| **D. General comments:**  |

**ATTACHMENT 3**

**Standard TEAMS Meeting Messages\***

Welcome to an offering of (*class title)* . Please standby - the class will start at \_\_\_(*time)* . Kindly mute your microphone or telephone, unless speaking.

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Notice of Teams Meeting Recording - Place in invitation & read at beginning:

Please be aware this meeting is being recorded to include participant shared audio, video, and screens. By participating in this recorded meeting, you are providing consent of the recording of your shared voice, image, screen content. If you do not wish to have your voice recorded, please do not speak during the meeting. If you do not wish to have your image recorded, please turn off your camera or participate by phone. The recorded meeting will be stored in SRS’s Microsoft O365 and will be available to SRS meeting attendees. Additional release of the recorded meeting shall follow SRS Site Policy and Procedures.

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Tips for a better online experience:

* Please turn off your webcam when you aren’t speaking. This helps avoid performance issues & reduces distractions.
* Use your microphone or the “Chat” feature to ask questions.
* Use the emoji “Reactions,” such as “thumbs up” or “clap” to show your support and participation.
* **ENGAGE!**  The best way to learn more and enjoy the class is to actively participate. Your feedback also helps the instructor.

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If you are participating using a TELEPHONE for audio or microphone, please enter your Name and User ID in the chat window - be sure to click the send icon (>)

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We are on a short BREAK – please be back promptly at (time)

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Please send your class evaluation to (appropriate e-mail address)

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