



# Using Microsoft Teams to Manage Care Requests



# What's the problem?

In situations of increased need, we can expect an influx of new requests that stress the often-organic care processes of many churches. How can we streamline the process and provide a means to:

- submit requests for help, simply,
- triage incoming requests,
- assign tasks to care team members,
- track progress?



# First things first

- Do you already have a system in place? Can it expand to support the current need?
  - Use what you have first if possible
- Does your ChMS have the ability to manage task assignments?
  - Consider whether you can get it running fast enough.



# Perfect world...

- When we come back to some normalcy, create day-to-day processes from everyday care that can easily scale up in times of demand.
  - Let's not recreate the wheel every time the scenario changes.
  - Just execute the plan "at scale"

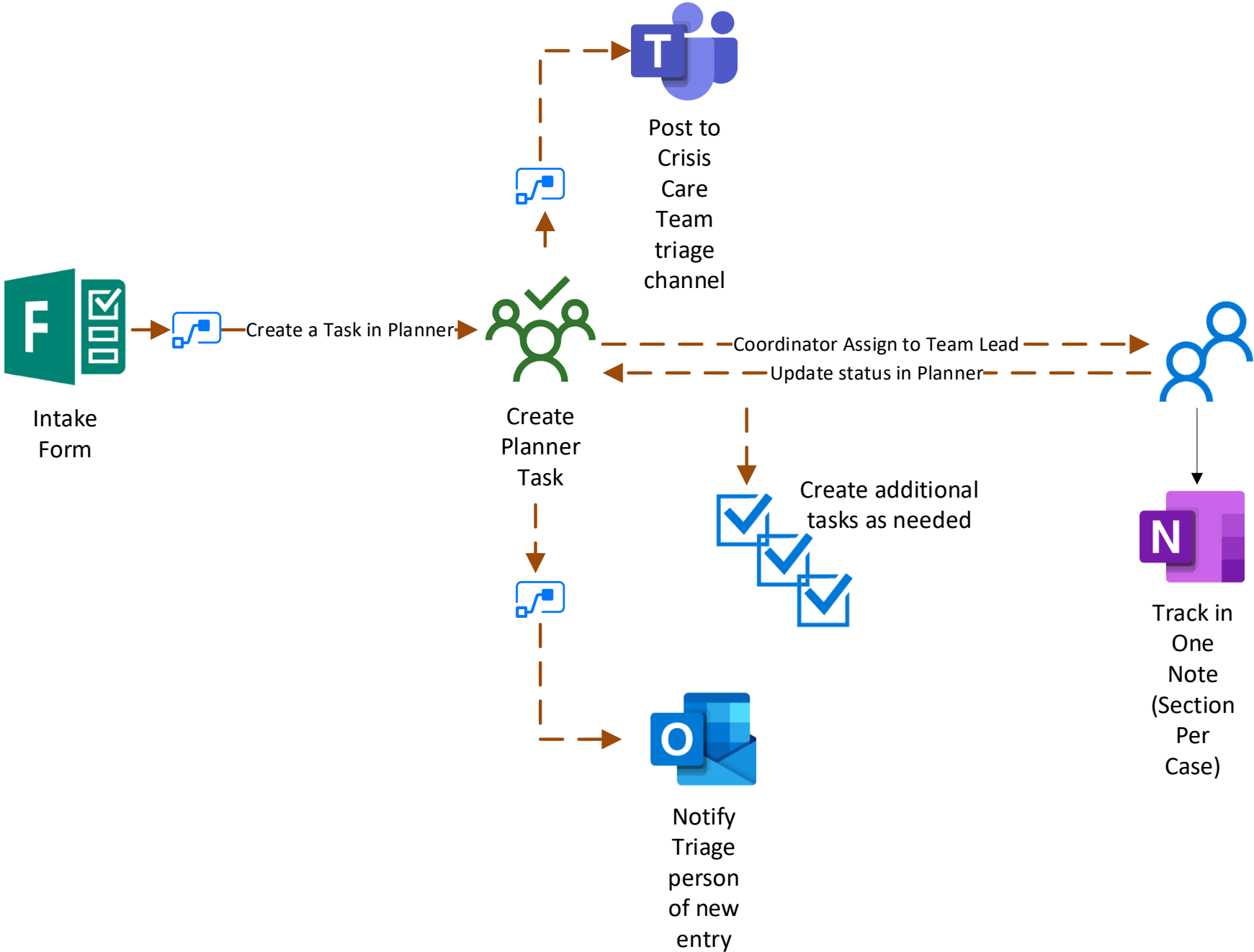


# Focus of this workshop

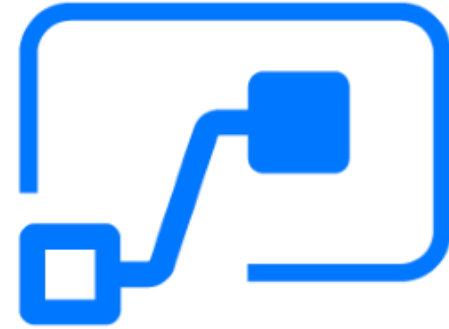
- Tracking incoming requests, assigning them, tracking them
- Match people who have a need with people who can meet a need
- [Watch a quick introduction video here](#)



Start with a diagram of the process



Tools

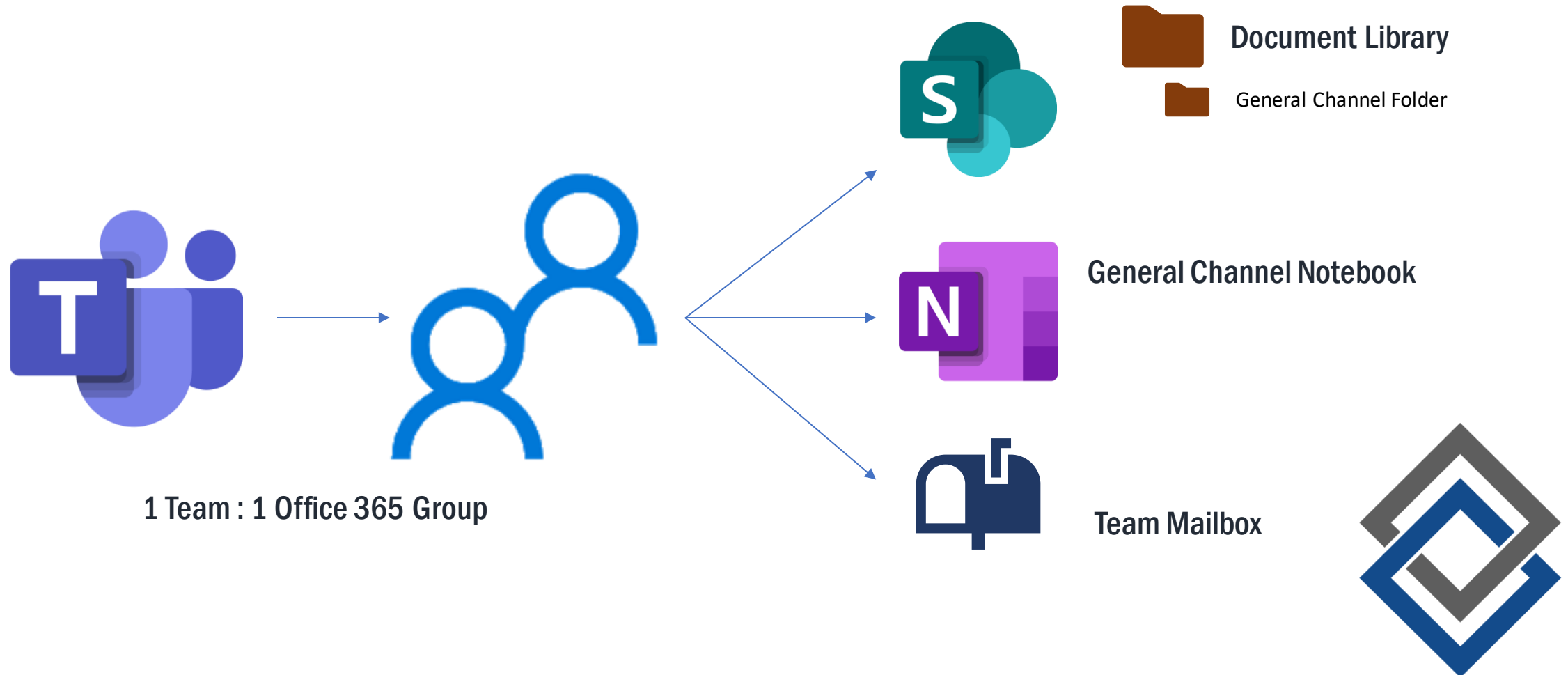


What we'll accomplish





# Structure of a Microsoft Team





# Create a Team

- [Click here to watch How To video](#)
- [Click here to log into Teams](#)





# Create a form

- [Click here to watch How To Video](#)
- [Click here to launch Microsoft Forms](#) or use Launcher/waffle
- Create a *shared form*





# Add a Planner to track tasks

- [Click here to watch How To video](#)
- Add a planner to your “triage” channel
- Explore the “buckets” and options for categorizing things





# Add a tab with a link to OneNote

- [Click here to watch How To video](#)
- Use OneNote to share and organize notes with the team

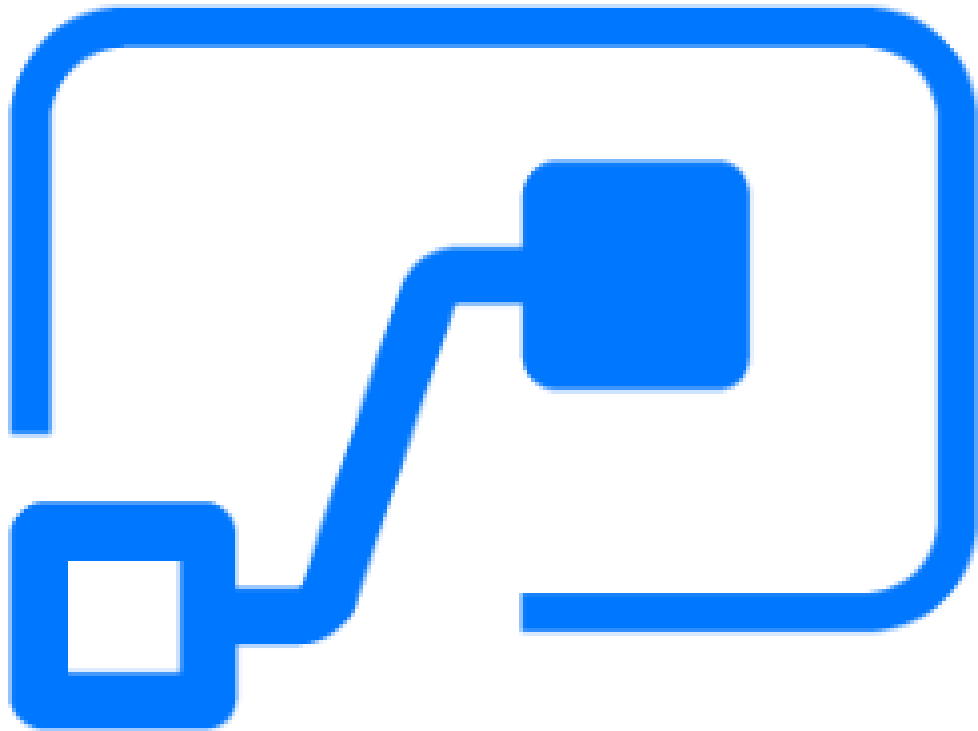




# Add tabs in a Private Channel

- [Click here to watch How To video](#)
- Resources in the private channel are private





# Create a Power Automate Flow

- [Click here to watch How To video](#)
- Create a flow from the templates that
  - Creates a task from the form
  - Notifies someone of the new task

