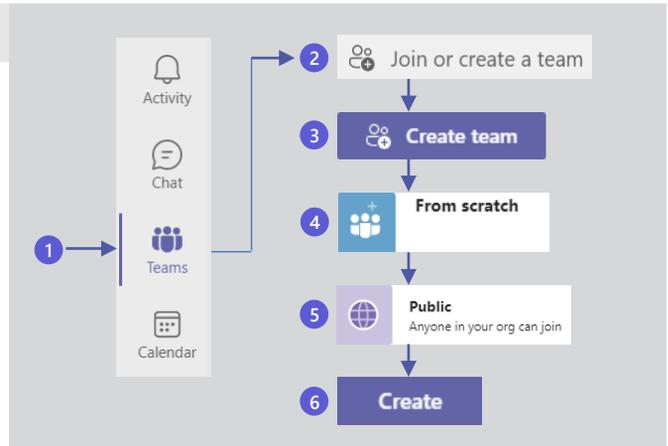


Quick start guide: Virtual tumor boards

1 Build your Teams workspace

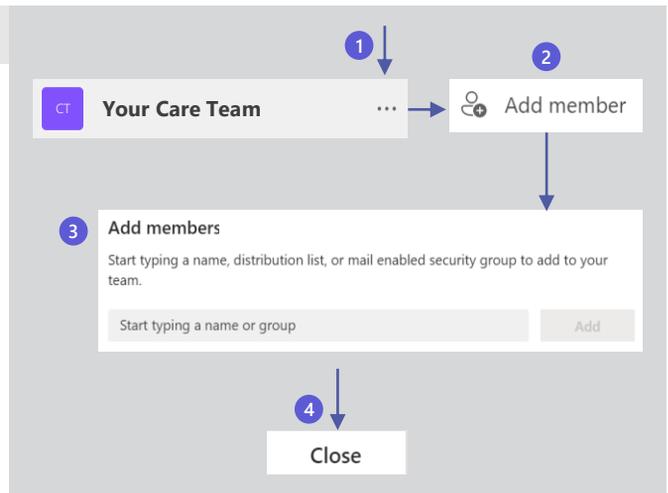
Create your team

- 1 On the left side of the Teams app, select **Teams**.
- 2 At the bottom of the teams list panel, select **Join or create a team**.
- 3 In the box that opens, select **Create team**.
- 4 Select **Build a team from scratch**.*
- 5 Choose **Public** for the kind of team (the Private option limits content and conversations).
- 6 Name your team and add an optional description. When you're done, select **Create**.



Add care team members to your team

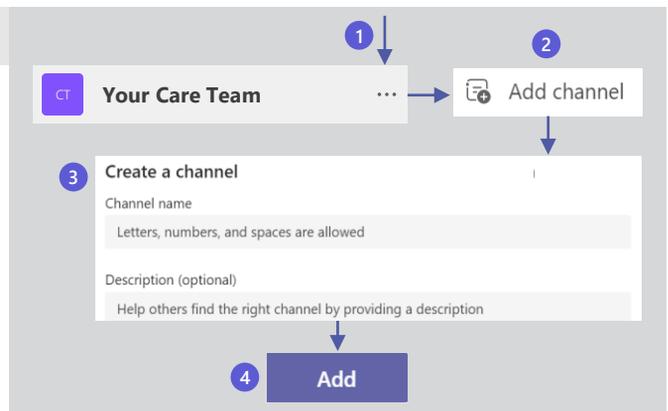
- 1 In the teams list, next to your team's name, click **More options*****.
- 2 Select **Add member**.
- 3 Start typing a name to add a person to your team. You can also add people as guests by typing their email addresses. Select **Add** to add the person (as either a member or owner).
- 4 When you're done adding members, select **Close**. Team members will receive an email letting them know they are now a member of your team, which will now show up in their Teams list.



Create the Tumor Board channel

Teams are made up of channels that denote topics of discussion. In this case, a tumor board.

- 1 In the Teams list, next to your team's name, click **More options*****.
- 2 Select **Add channel**.
- 3 Name the channel *Tumor Board*.
- 4 Select **Add**. This adds the channel to the team.



*Note: If you have an existing Microsoft 365 group, you can create a team from that group. For more information, go [here](#). You can also create a team from a template. For more information, go [here](#).

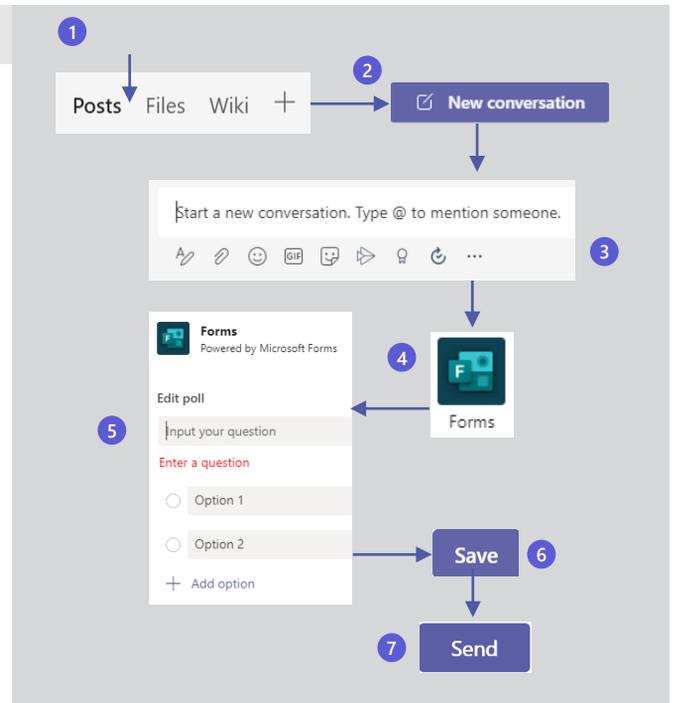
Microsoft Teams

2 Schedule the tumor board meetings

Poll team members for the best time

- 1 Select the Tumor Board channel in the teams list, then select **Posts** at the top of the app.
- 2 Select **New conversation**.
- 3 Select **More options** ***.
- 4 Search for and select **Forms**.
- 5 Enter your question (for example, "When should we have our Tumor Board meetings?") and options (for example, days of the week and times).
- 6 Select **Save**.
- 7 Preview the poll and if ready, select **Send**.

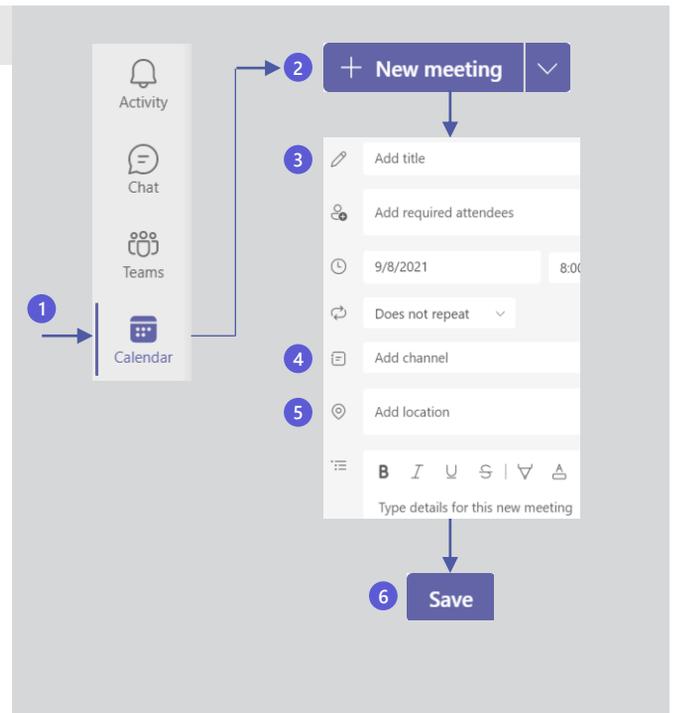
The poll will appear in the Tumor Board channel's Posts tab along with the poll results, updated in real time as team members respond.



Create the meeting and send invites

If your calendar in Teams is connected to your Exchange calendar, when you schedule a meeting in Teams, it'll show up in Outlook, and vice versa.

- 1 On the left side of the Teams app, select **Calendar**.
- 2 Above the calendar, select **New meeting**.
- 3 Add a title ("Tumor Board") and the required and optional attendees, select the date and time range from the poll results, and choose how often you want it to occur (for example, weekly).
- 4 If you want the meeting to occur in the Tumor Board channel (so that all channel members are invited), select the channel.
- 5 Add a location for those attending in person.
- 6 After completing the meeting details, select **Save**. This will send an invite to everyone's email.



Microsoft Teams

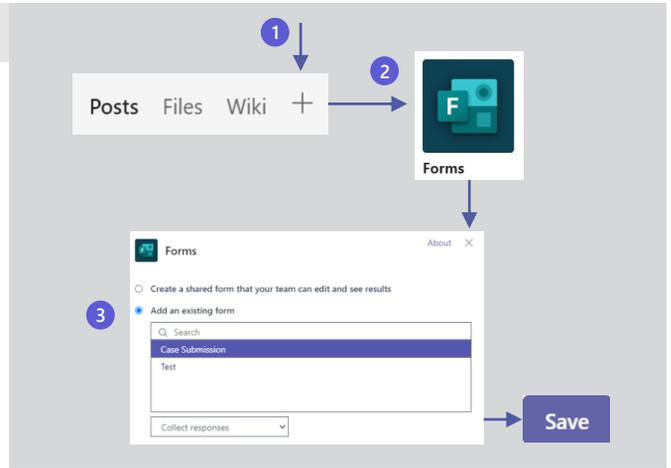
3 Create a case submission form and case list

Create a tab for the submission form

Use Microsoft Forms to create the form. See [Create the form using Microsoft Forms](#) for guidance.

- 1 Select the Tumor Board channel in the teams list, then select **Add a tab** + at the top of the app.
- 2 Search for and select the **Forms** app.
- 3 Select **Add an existing form**, select the form you created, choose **Collect responses** and select **Save**.

The form will appear in the new Case Submission tab.



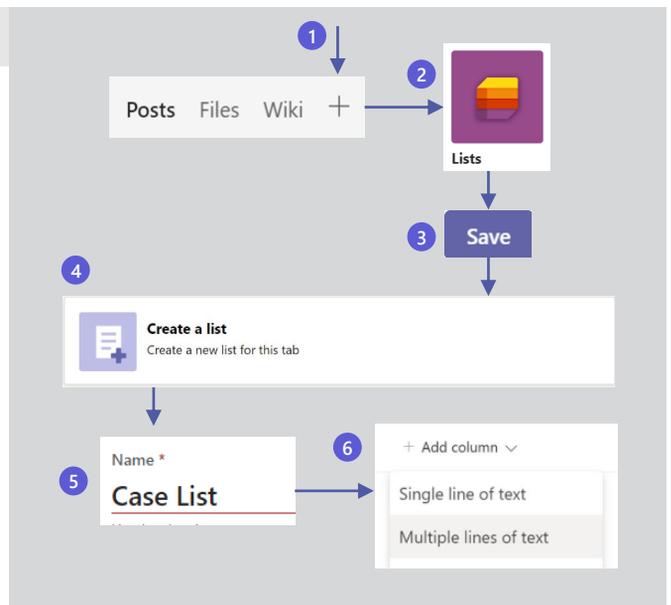
Create a tab for the case list

- 1 Select the Tumor Board channel in the teams list, then select **Add a tab** + at the top of the app.
- 2 Search for and select the **Lists** app.
- 3 Select **Save**.
- 4 Select **Create a list** and select **Blank list**.
- 5 Name the list *Case List* and select **Create**.

The new Case List tab will appear with an empty list ready for case submissions.

- 6 Create columns that match the fields in the submission form.

Note: As an additional reference, consider adding the [NCCN Guidelines web site](#) as a tab.



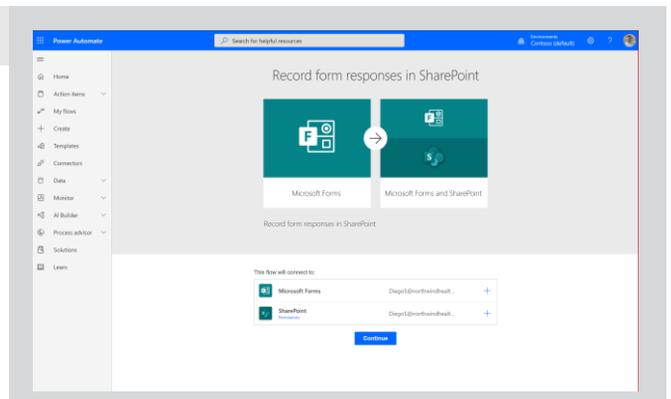
Link the form to the case list

Use Power Automate to link the *Case Submission* form to the *Case List* list using the following connector:

[Record form responses in SharePoint | Microsoft Power Automate](#)

Each new submission on the *Case Submission* form automatically updates the *Case List* list.

You can take the form link and share it with participants who are outside the Team as well for external intake.



Microsoft Teams

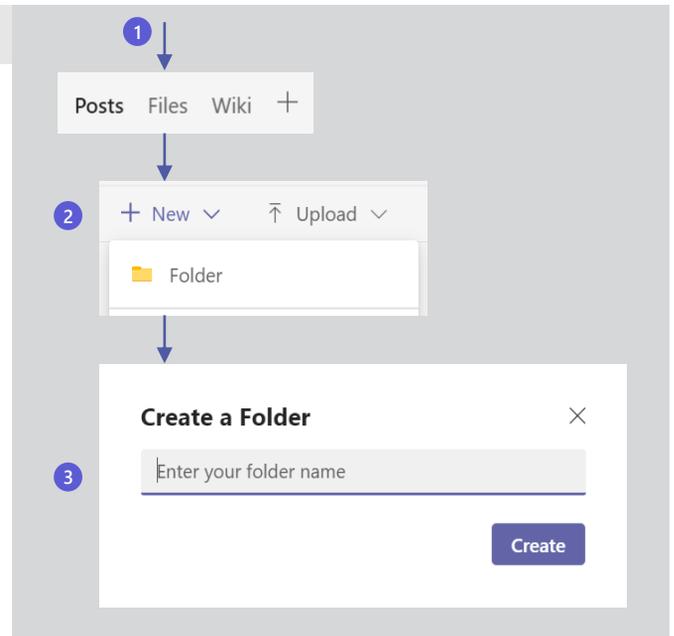
4 Set up file folders for cases

Create folders in the Files tab

- 1 Select the Tumor Board channel in the teams list, then select **Files** at the top of the app.
- 2 Select the **New** drop-down and select **Folder**.
- 3 Name the folder for a case number and select **Create**.

The folder will appear in the Files list.

Open the folder and you can upload documents such as care plans and meeting notes and create subfolders (repeating steps 2 and 3) with names such as *History*, *Pathology*, *Radiology*, and whatever else is appropriate for your team.



5 View and maintain case data and reporting

Connect the Case List data to Power BI

Power BI dashboards provide valuable insights into the data you collect. For guidance on using Power BI to create reports, see:

[Create a report on a SharePoint List in Power BI Desktop - Power BI | Microsoft Docs](#)

- 1 Select the Tumor Board channel in the teams list, then select **Add a tab** at the top of the app.
- 2 Search for and select the **Power BI** app.
- 3 Name the tab *Tumor Board Tracker*.
- 4 Select the Power BI report.
- 5 Select **Save**.

The report will appear in the Tumor Board Tracker tab and can be viewed and manipulated in real time.

