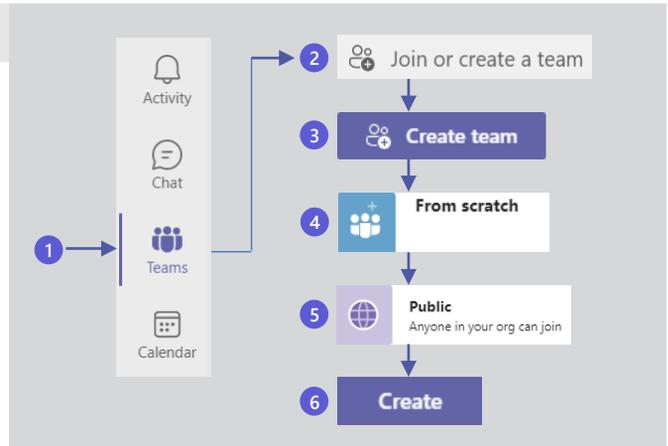


## Quick start guide: Care team huddles

### 1 Build your Teams workspace

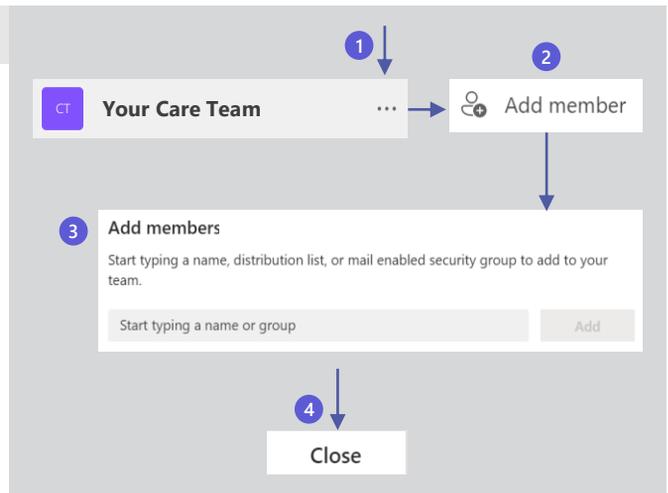
#### Create your team

- 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

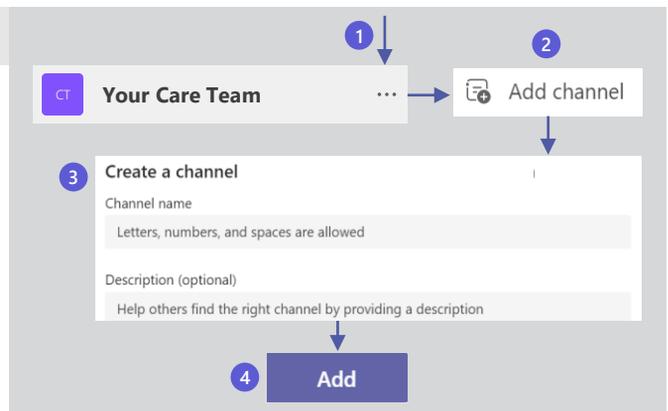
- 1 In the teams list, next to your team's name, click **More options**\*\*\*.
- 2 Select **Add member**.
- 3 Start typing a name to add a person to your team. You can also add people as guests by typing their email addresses. Select **Add** to add the person (as either a member or owner).
- 4 When you're 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.



#### Add channels to your team workspace

Teams are made up of channels. Examples of channels for care teams are Daily Huddle, Administrative Tasks, Care Coordination, etc.

- 1 In the Teams list, next to your team's name, click **More options**\*\*\*.
- 2 Select **Add channel**.
- 3 Enter a name and description for your channel.
- 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 Prepare for your team huddles

### Decide on a digital workspace

Data from Lists, Excel, OneNote, and other apps can be displayed in your team channels for easy access, sharing, and maintenance by the care team. Choose which apps will fulfill your care team's requirements.



### Aggregate and integrate your data

You can integrate your data into your Teams channels by adding tabs. In this example, we'll use the **Lists** app to create a new list in a tab.

- 1 In the Teams app, select the channel in the teams list, then select **Add a tab** + at the top of the app.
- 2 Search for the app you want to use. In this example, we'll use **Lists**.
- 3 Select **Save**.
- 4 Select **Create a list**.
- 5 You can choose how you want to create the list. In this example, we'll start with a **Blank list**.
- 6 Give the list a name and a description. Choose a color and an icon.
- 7 Select **Create**.

You can now create a table with columns and rows.

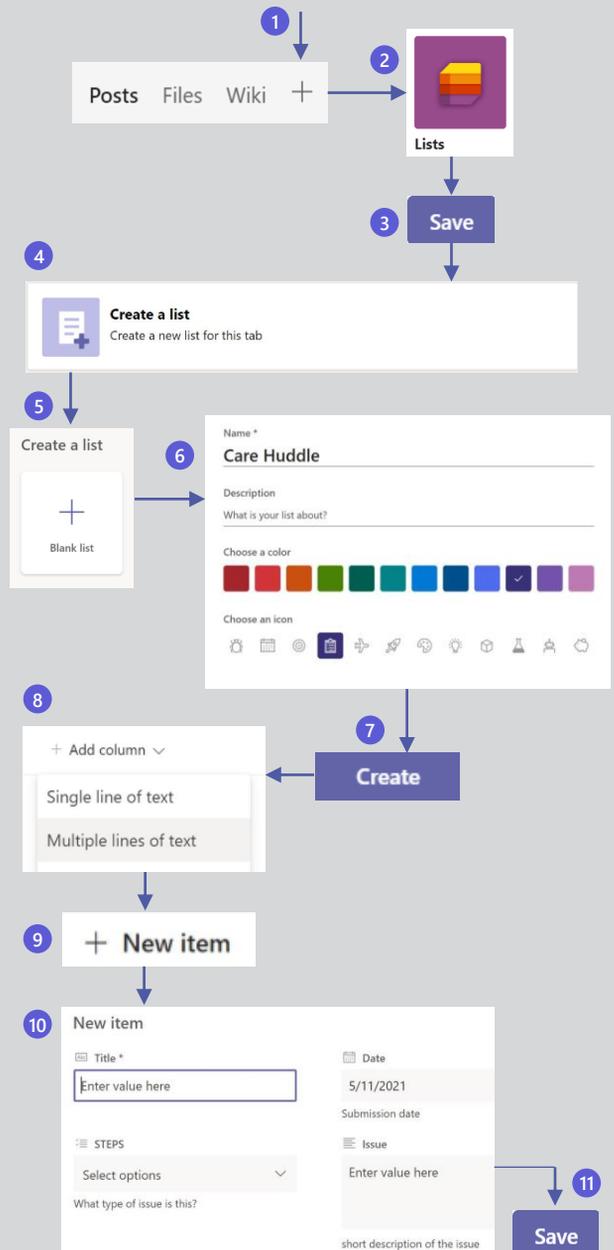
- 8 Select **+ Add column**, then select the appropriate type of column from the drop-down, (for example, the column can contain a line of text, a location, a number, a date, a person, etc.).

When you are done adding your columns, you can begin entering list items.

- 9 Select **+ New item** at the top of the list.
- 10 Complete the form to add content to each field in the form.
- 11 When you are done, select **Save**.

Repeat for each new row to complete your table.

For more information about using an app in a tab, go [here](#).



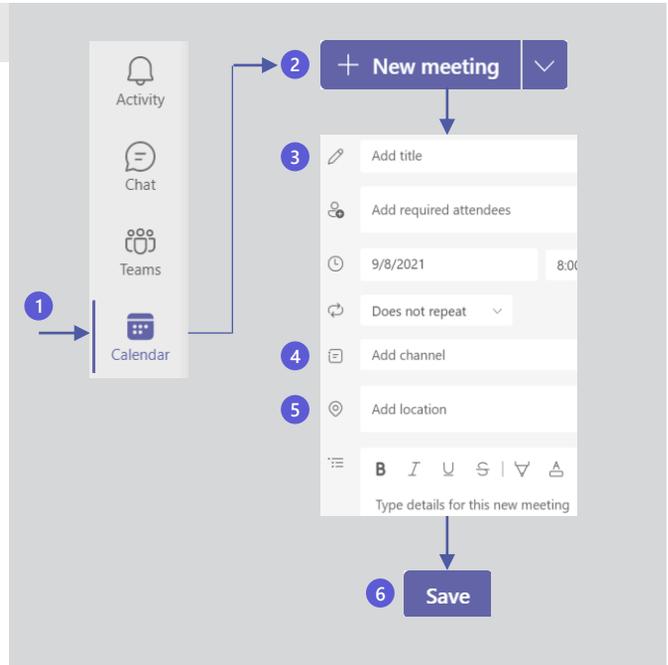
# Microsoft Teams

## 3 Schedule the huddle

### Create a 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.

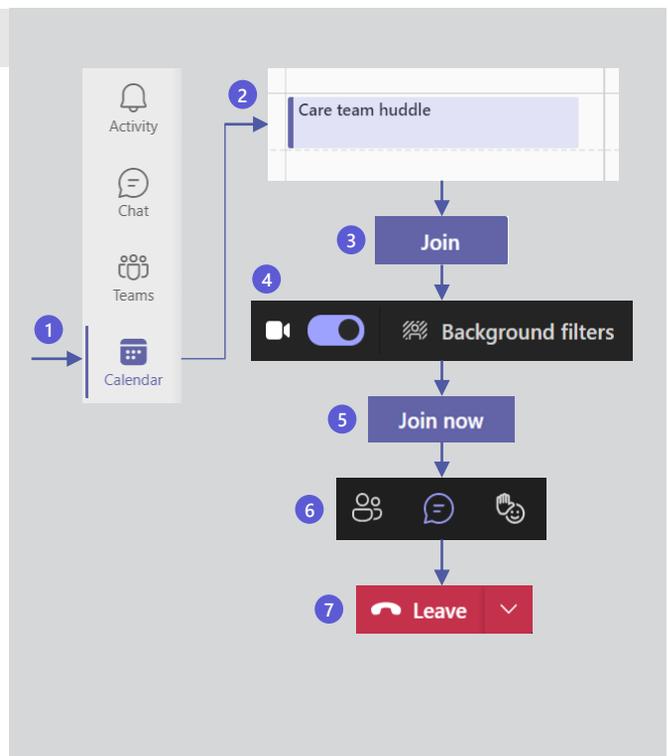
- 1 On the left side of the Teams app, select **Calendar**.
- 2 Above the calendar, select **New meeting**.
- 3 Add a title and the required and optional attendees, select the date and time range, and choose how often you want it to occur.
- 4 If you want the meeting to occur in a specific channel, select 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.



## 4 Conduct the huddle

### Join and participate in the huddle

- 1 On the left side of the Teams app, select **Calendar**.\*
- 2 In the calendar, select the meeting.
- 3 Select **Join**.
- 4 Choose your video and audio options. If you want to use your camera, you can apply background filters to blur it or apply background effects.
- 5 To join the meeting, select **Join now**.
- 6 Use the icons at the top of the meeting window to:
  - Show a list of participants.
  - Show the meeting chat and send text messages.
  - Use an emoji to "raise your hand" for attention without interrupting the conversation.
- 7 To leave the meeting, select **Leave** at the top of the meeting window.



\*Note: You can also join Teams meetings from an email invite and from mobile devices. For more information, go [here](#).

# Microsoft Teams

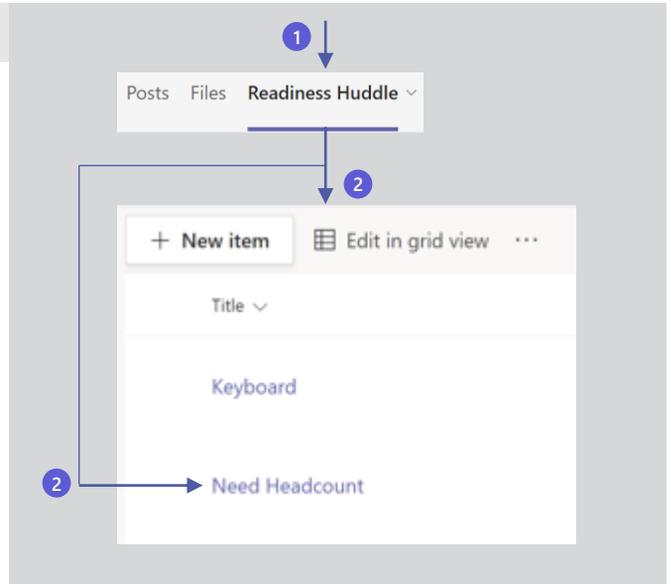
## 5 Follow up

### Update lists and data

Follow up on tasks and update the status of list items by editing your Teams data in real time. In this example, we're using a tab that has a **Lists** app.

- 1 Select the tab with your list name.
- 2 You can choose to edit the list in a grid view (like editing a spreadsheet) or edit specific items in a form. Select **Edit in grid view** or select the list item in the Title column.

When done, save your edits. Your care team will see the updated data when they view the list.



### Create reports and analyze data

You can add a tab for Power BI to a Teams channel and link it to your lists, then perform real time reporting and analysis of list data.

For more information on using Power BI to create a report on a list, go [here](#), or reach out to your Microsoft resources for further assistance.



Power BI

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Chat and meetings



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Quick start guide



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