



Beyond Spreadsheets: Transforming Your Agency with Automation

Agenda

Introduction to CICOA

Introduction to Power Automate

Demos

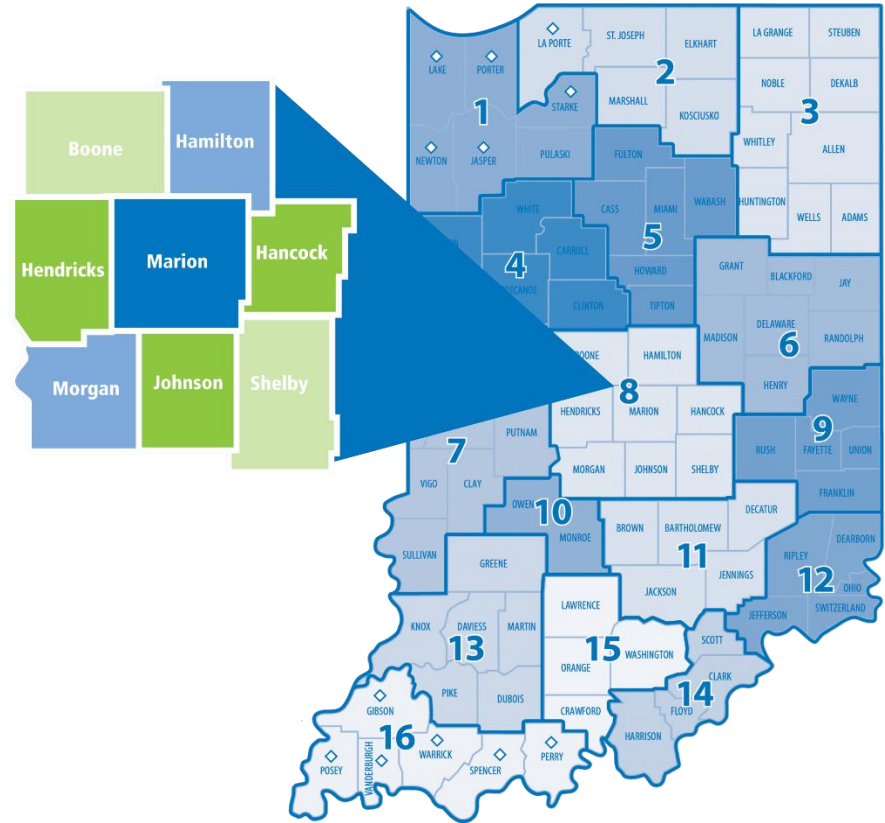
Limitations/Considerations

Discussion and Q&A



About CICOA

- Indiana's largest Area Agency on Aging (AAA)
- Not-for-profit organization
- Founded in 1974
- Serving 8 counties in Central Indiana (Area 8)



Services Provided FY24



What is Power Automate?

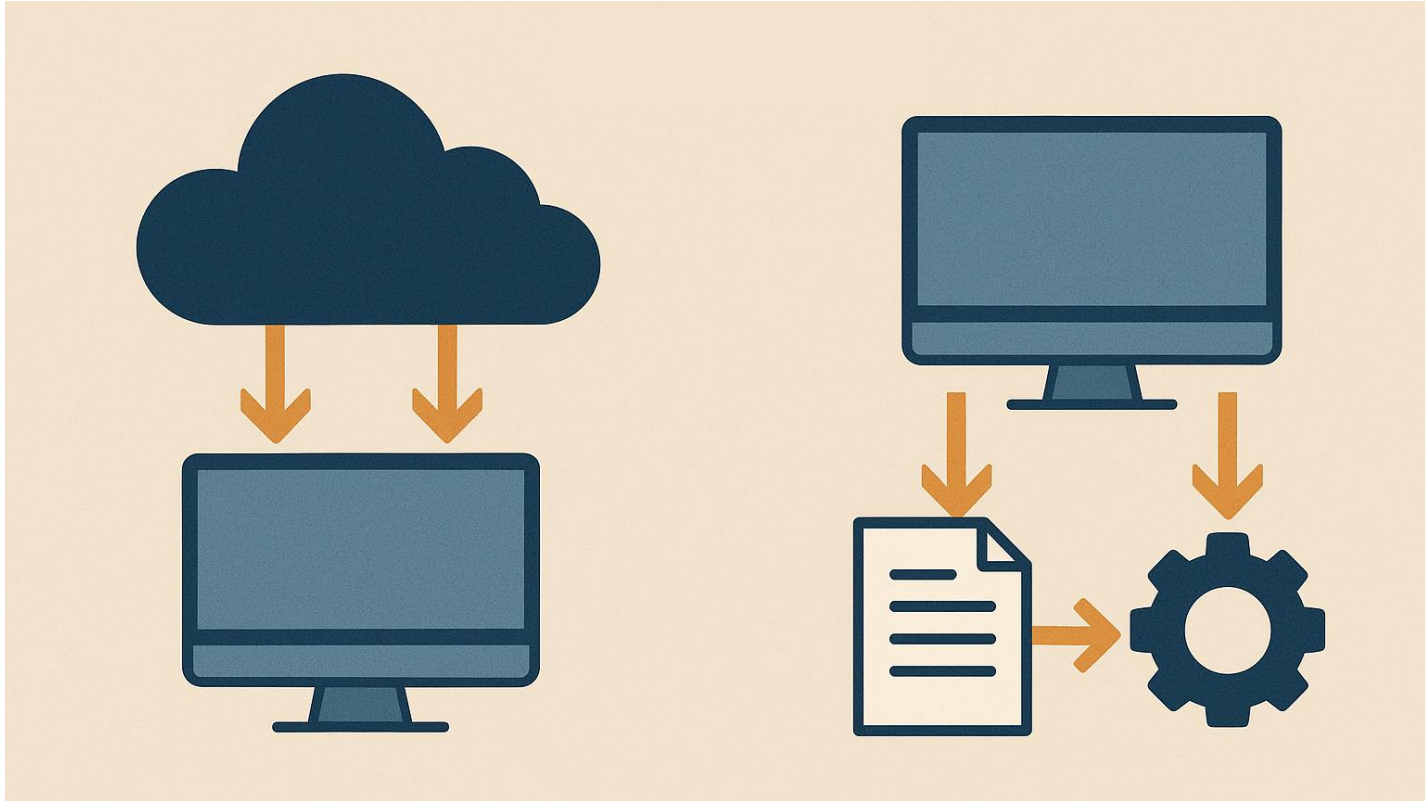
Power Automate is a Microsoft tool that helps you take repetitive, manual tasks—and make them happen automatically.

Examples:

- Send an email when a form is submitted
- Move data from one spreadsheet to another
- Remind someone if a task hasn't been completed
- Populate information in a file from an excel file



Power Automate Cloud vs Desktop



Demo 1: Incident Reporting

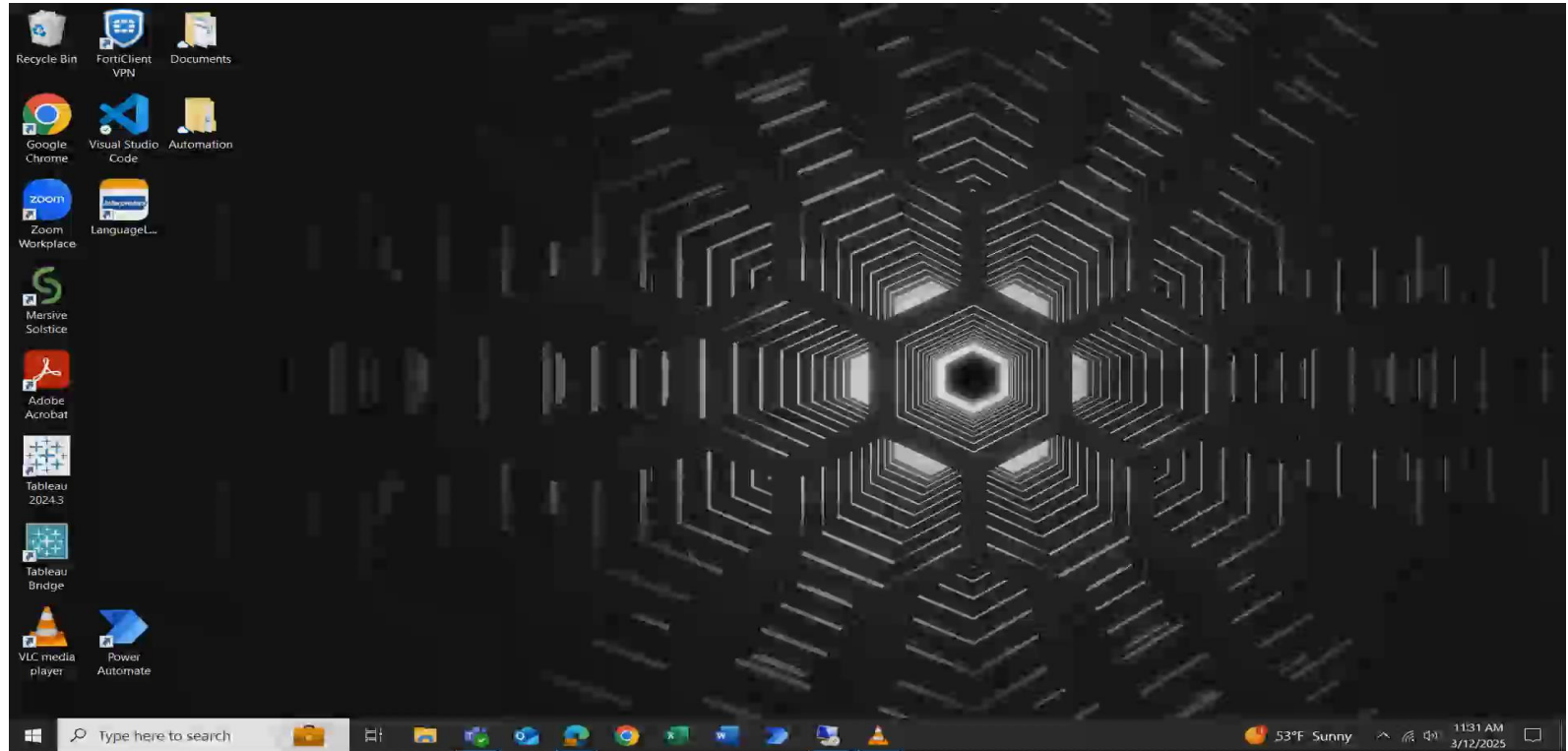
- Used by Compliance, Quality, HR, and IT departments
- Captures incidents such as:
 - Misfiled case notes (e.g., potential HIPAA violations)
 - Lost or stolen equipment
 - Timecard discrepancies or fraud
- Replaces manual tracking and document creation



Use Cases

<i>Approve</i>	Start and wait for an Approval
<i>Create</i>	Create a Folder
<i>Save</i>	Save files with information populated
<i>Populate</i>	Fill data into a spreadsheet
<i>Send</i>	Send an email
<i>Assign</i>	Assign a task in Planner

Demo 2: Pull Data



Use Cases



Login to a
system



Click through
the system to
download a
report

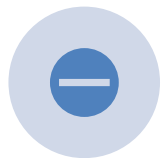


Move a file to a
folder and
rename it



Run a python
script

Limitations and Challenges



Licensing &
Permissions



Maintenance



Flows connected
to specific users



Run Frequency
Limits / Quotas



Final Considerations

1

Use the tools
you have

2

Start small

3

Develop metrics
to measure
impact

Discussion



Beyond Spreadsheets:
Transforming Your Agency with
Automation Feedback



<https://forms.office.com/r/2NjsvgSaPa>

Thank you!

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