

Greenfield Home Care Agency: Microsoft 365 Digital Transformation

Evaluating efficiency, communication and digital safety in modern care support.

Prepared by: Rizwana Ahmed (2525197)

Nadia Zeeshan (2522818)

Saiqa Munir (2330363)

Course: CERTHE Skills for the Workplace (Health and Social Care)



Contents

01. Introduction

- Overview of Greenfield Home Care Agency

02. Microsoft Word for Efficiency

- Importance of this tool in Health and Social care focusing on our study case
- Pros and Cons

03. Teams Collaboration Strategy

- Importance of this tool in Health and Social care focusing on our study case
- Pros and Cons

04. Digital Safety Action Plan

- Aspects to be considerate
- Key goals for data security
- Implementation Checklist

05. Conclusion

- Concise Overview

06. Reference List



Introduction

1. Target Audience

Focus on older adults needing personalized care to live independently.

2. Staff roles

Includes coordinators, nurses and visiting carers providing essential support.

3. Tech Adoption

Recently adopted Microsoft 365 to enhance communication and documentation.

4. Management Goals

Aim to boost efficiency and data safety through integrated digital technology.

(Greenfield, 2024)

Microsoft Word for Efficiency

IMPORTANCE

- Manual logs will be replaced with standardized Microsoft Word templates.
- Implemented cloud-syncing to provide nurses and coordinators with rapid access to the most recent care plans.
- Field caretakers can reduce administrative latency by using built-in dictation and auto-format tools.
- Monitor document modifications to guarantee accurate records.

(Smith, 2023)





Microsoft Word for Efficiency

PROS

1. Time Saving and Operational Benefits

Word enables quick drafting of care plans and reports, boosting overall productivity.

Professional formatting.

2. Secure Cloud Storage and Reduced Paper Waste

Files can be stored securely, reducing the paper waste and access can be restricted based on staff roles.

3. Version history and Audit Trail

Word keeps version history in Microsoft 365 and helps with accountability and compliance.

CONS

1. Risk of Data Breach if Misused

Unauthorized staff might download documents to personal devices.

Weak passwords increase risk.

2. Requires Digital Skills

Some carers may struggle with editing, sharing or using Track Changes.

Training is necessary.

3. Human Error Risk

Staff could accidentally delete information.

(Jones and Brown, 2022; NCSC, 2023)

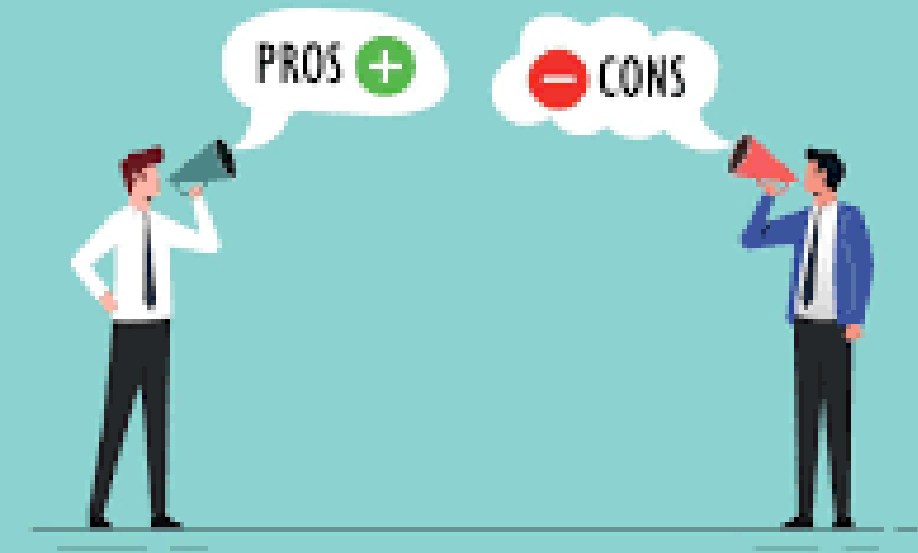
Teams Collaboration Strategy

IMPORTANCE

- Visiting carers can use **Teams Chat** for immediate queries to coordinators, reducing phone call volume.
- Utilizing **Video Conferencing** for staff shifts, ensuring nurses and carers share critical patient data visually.
- Storing organizational policies within **Teams Channels** for 24/7 access across all locations.
- Allows seamless access to shared documents during chats through **File Sharing Integration**.

(Miller, 2023)





Teams Collaboration Strategy

PROS

1. Reduction in miscommunication

Drastic reduction in miscommunication during shift handovers via recorded video calls.

2. Secure File Sharing

Secure file sharing prevents patient data from being sent over to insecure personal apps like WhatsApp.

3. Better Collaboration

Teams channels can be created for care coordination, scheduling, medication updates and administration.

CONS

1. Dependency on Mobile Data

Dependency on mobile data in rural areas can leave field carers disconnected from the office.

2. Resistance to Change

Initial staff resistance to change requires a comprehensive internal training program.

3. Phishing and External Access Risks

Teams can be targeted through malicious links or fake meeting invitations, especially risky if staff is not trained.

Digital Safety Action Plan

- Greenfield Home Care Agency protects and handles service user and staff data.
- It is essential to ensure that digital systems are used safely and responsibly which is done via Microsoft 365.
- A strong digital safety action plan reduces risks of data breaches and cyberattacks.
- The plan ensures compliance with data protection laws.





Key Goals for Data Security

The Digital Safety Action Plan focuses on four key areas:

1. **Secure Access**
2. **Email Awareness**
3. **Data Management**
4. **Confidentiality and Compliance**

Each area includes practical actions using Microsoft 365 to improve data protection and digital safety.

(Microsoft,2024; NHS Digital, 2023)



Checklist

Key Goal	Risks at Greenfield	Actions Using Microsoft 365
1. Secure Access	Unauthorized access to care records if accounts are shared or passwords are weak.	• Enable Multi-Factor Authentication (MFA) for all staff using Microsoft Entra ID • Use strong passwords policies • Apply role-based access control, so carers only access information relevant to their duties (Microsoft, 2024)
2. Email Awareness	Phishing emails may lead to data breaches or malware.	• Provide regular staff training on identifying phishing emails • Use Microsoft Defender for Office 365 to detect suspicious emails • Encourage staff to report suspicious emails using the Report Message feature in Outlook • Protects staff from scam emails pretending to be managers or healthcare partners, reducing risk of credential theft and data breaches (NCSC, 2023)

Checklist

Key Goal	Risks at Greenfield	Actions Using Microsoft 365
3. Data Management	Loss or accidental deletion of service user data	• Store all documents securely in SharePoint and OneDrive, not on personal devices. • Use automatic backups and version history in Microsoft 365. • Apply data classification and sensitivity labels to care records. • Ensures care plans and medical notes are stored securely, backed up and accessible only to relevant staff, reducing data loss risks. (ISO, 2022)
4. Confidentiality and Compliance	Breach of General Data Protection Regulation (GDPR) and patient confidentiality.	• Use Microsoft Purview to manage data protection and compliance. • Ensure only authorized staff access confidential records. • Provide staff training on GDPR, confidentiality and ethnical data handling. (ICO, 2023)

Conclusion



By the implementation of the Microsoft 365 tools, Greenfield can be transformed into a digitally secure and efficient healthcare provider.



Secured access controls, improved email awareness, effective data management and strong confidentiality practices will protect sensitive information while enabling efficient and collaborative care delivery.

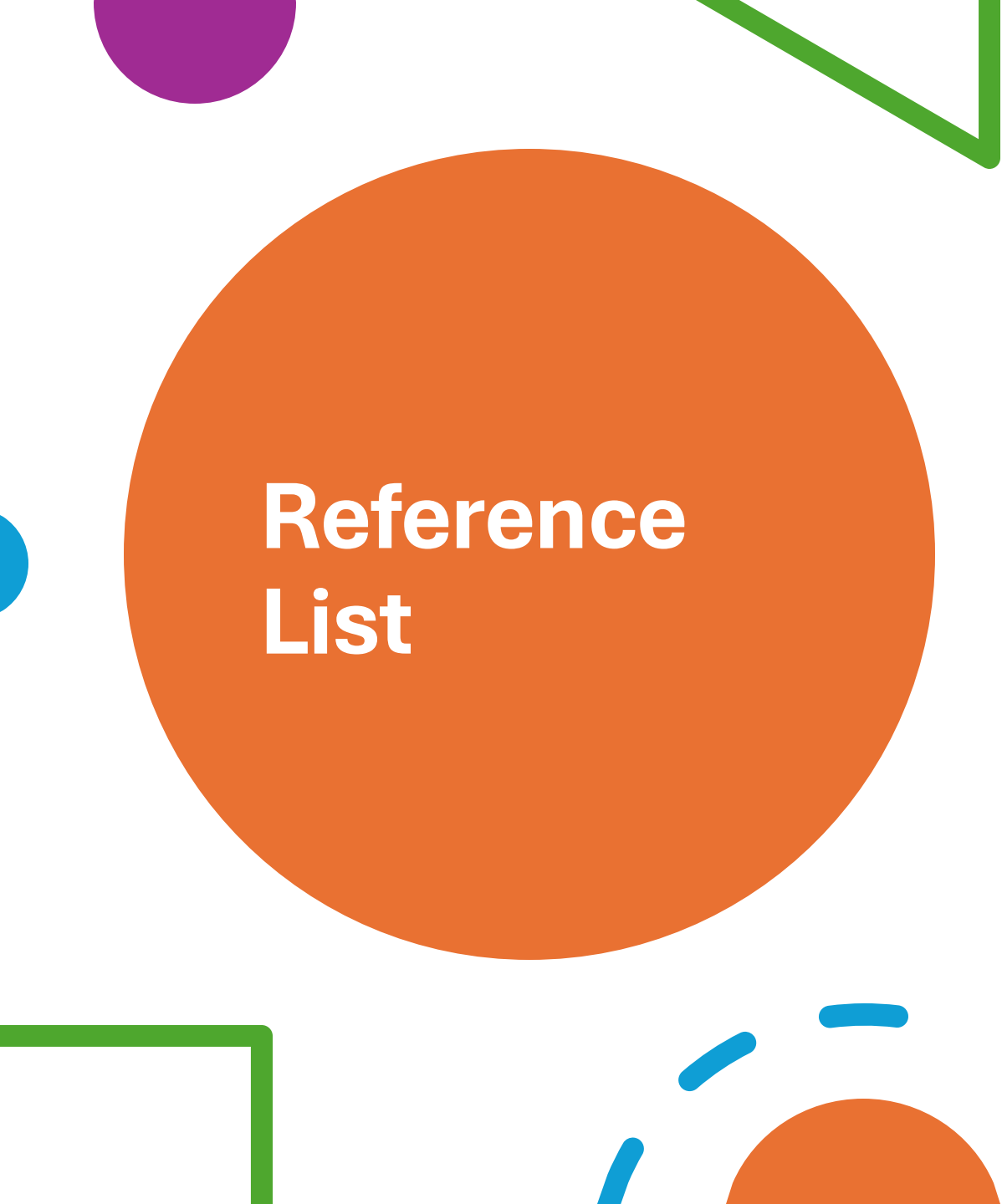


Microsoft 365 provides the tools but staff confidence and the Digital Safety Action Plan will ensure the long-term success of this transformation.



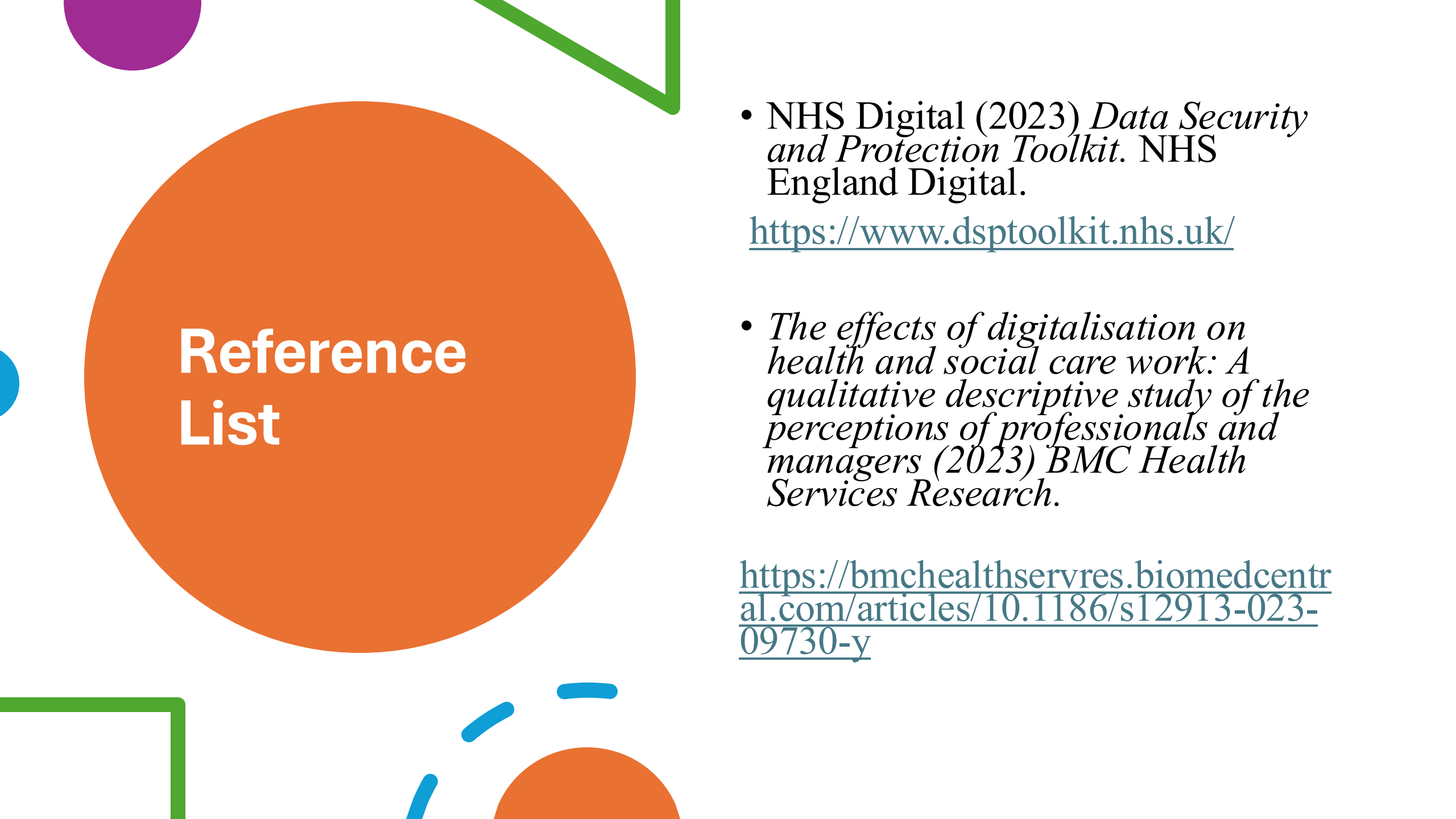
Reference List

- IFAC-PapersOnLine (2022) *Digital Transformation of Home Care: Literature review and research agenda*.
<https://doi.org/10.1016/j.ifacol.2022.12.070>
- ICO (2023) *Guide to the UK General Data Protection Regulation (GDPR)*. Information Commissioner's Office.
<https://ico.org.uk/for-organisations/guide-to-data-protection/>
- ISO (2022) *ISO/IEC 27001: Information Security Management Systems*. International Organization for Standardization.
<https://www.iso.org/standard/27001>



Reference List

- Microsoft (2024) *Microsoft 365 security and compliance documentation*. Microsoft Learn.
<https://learn.microsoft.com/en-us/microsoft-365/security/>
- Miller, S. (2023) *Remote Collaboration and Microsoft Teams*. NY : Tech Today.
<http://techtoday.org>
- NCSC (2023) *Phishing attacks: How to protect your organization*. National Cyber Security Centre.
<https://www.ncsc.gov.uk/guidance/phishing>



Reference List

- NHS Digital (2023) *Data Security and Protection Toolkit*. NHS England Digital.

<https://www.dsptoolkit.nhs.uk/>

- *The effects of digitalisation on health and social care work: A qualitative descriptive study of the perceptions of professionals and managers (2023) BMC Health Services Research.*

<https://bmchealthservres.biomedcentral.com/articles/10.1186/s12913-023-09730-y>