



Module Code: LCHS4007_BIRM

Module Title: Digital Skills and Research Methods

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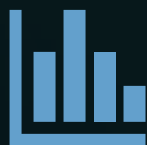
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PRESENTATION OUTLINE



Introduction to
MS Excel



MS Outlook



Digital safety
action plan



conclusion

INTRODUCTION TO MS EXCEL

Operational Efficiency and Scheduling

Enhanced Resident Care and Tracking

Financial and Compliance Management

Collaboration and Modern Features

CURRENT COMMUNICATION CHALLENGES AT GREENFIELD



APPLICATION OF MS EXCEL WITHIN GREENFIELD

- Operational Efficiency and Staff Management: Rota and shift planning, Automated Calculations & Inventory tracking.
- Enhanced Resident Care and Safety: Health Metric Tracking, Trend Identification and Care Plan Coordination.
- Compliance and Audit Preparedness: Searchable Records, Audit Trails and Reporting Tools.
- Financial Management: Budgeting (Home Care Package HPC) and Statement Generation.
- Collaborative Working: Cloud Access with Microsoft 365 and Integration



ADVANTAGES OF MS EXCEL

Real-time Collaboration: Multiple staff members can update schedules, dietary requirements, or care plans simultaneously, ensuring everyone sees the latest information.

Efficiency and Automation: Copilot in Excel and Power Automate reduces manual work for repetitive tasks like staff rostering, inventory tracking, and incident reporting.

Data Accessibility & Security: files stored in OneDrive are accessible from any device facilitating on-the-go update's, while maintaining security and compliance with GDPR and CQC requirements.

Improved Decision Making: Centralized data allows for better analysis of operational metrics, such as staff hours vs resident needs.

Reduced Admin Time: By reducing-time spent on paperwork, staff can focus

CHALLENGES OF MS EXCEL AND SOLUTIONS

CHALLENGES

High risk human error

Data Security and Compliance Risks

Version control issues

Lack of Real-time Collaboration

SOLUTIONS

Utilize Microsoft 365 Copilot in Excel to automate tasks such as inventory tracking, rota planning, and generating insights, reducing manual workload.

Centralize Data with SharePoint/Teams: stop emailing spreadsheets and use OneDrive or SharePoint for a single live version of a document.

Enable Shared Device Mode (SDM): Enable SDM so staff can securely sign in and out of MS 365 apps, clearing personal data between shifts to maintain compliance.

Upskill Staff: Provide training on Excel best practices to ensure staff understand how to securely manage and accurately enter data.

CONCLUSION

Microsoft 365 Excel is an accessible and powerful bridge for care homes- offering a cost-effective way to digitize rotas, budgets and inventory without immediate expense of bespoke software.

Its true value lies in its flexibility; its effectiveness is entirely dependent on strong governance. Without strict data validation, version control, and cloud-based security, it remains high-risk for human error and compliance breaches.

REFERENCES

- Microsoft Corporation, 2018. Microsoft Excel , Available at: <https://office.microsoft.com/excel>.
- Excel 1.0 (Mac):30 September 1985.
- Excel 2.0 (Windows): October 1987.
- Excel 5.0(VBA Intro): 1993
- Office 95 (Excel 7.0): 1995
- Office 2013: Released in 2012 with the first major cloud storage integrations.
- Introduction to Microsoft 365 excel – Google Scholar
- Introduction to Microsoft 365 excel with a carehome Harvard - Google Scholar
- <https://excel.cloud.microsoft/en-us/>
- Microsoft Corporation, 2018. Microsoft Excel, Available at: <https://office.microsoft.com/excel>
- <https://www.microsoft.com/excel>

A decorative graphic consisting of blue circuit-like lines with small circles at the ends, extending horizontally from the left and right sides of the central black box.

MS OUTLOOK

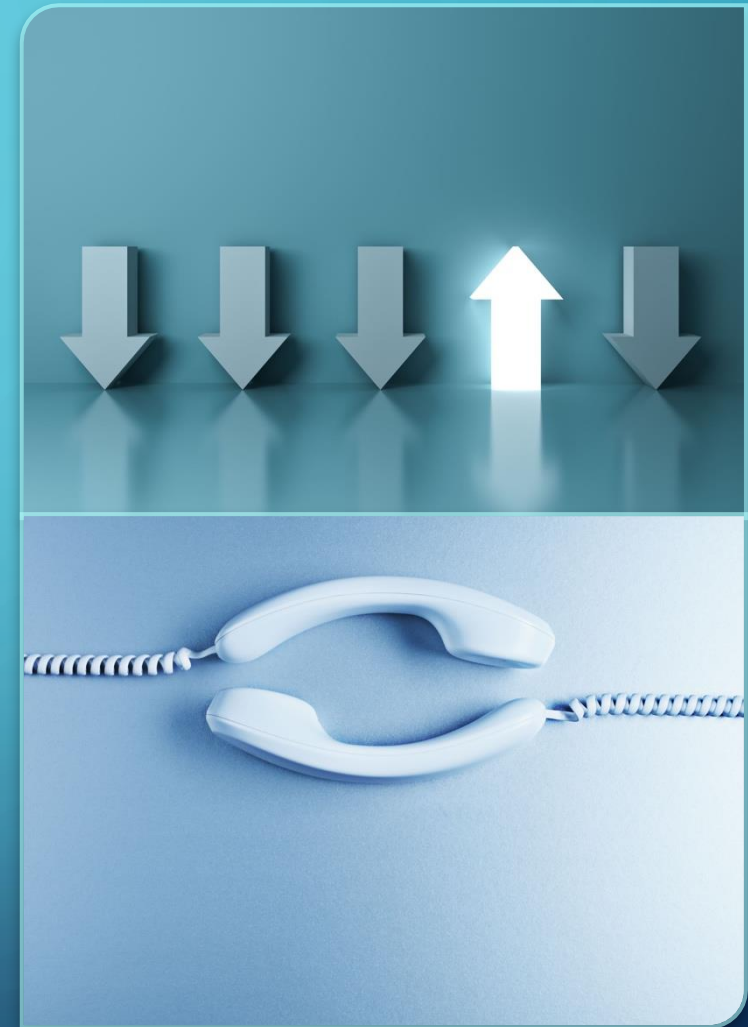
INTRODUCTION TO MS OUTLOOK



- MS Outlook is a Microsoft 365 communication and scheduling tool.
- Used for email, shared email boxes and calendars.
- Supports communication between nurses, carers, and admin personnel at Greenfield Home Care Agency.
- Effective communication is essential for safe, patient centred home care.

CURRENT COMMUNICATION CHALLENGES AT GREENFIELD

- Reliance on phone calls, paper notes and informal messaging.
- Information can be delayed or missed between carers and the main office.
- A lack of clear documentation can make it challenging to establish responsibility.
- These issues reduce efficiency and may affect quality of care.



A stack of spiral-bound notebooks is shown on a light-colored wooden surface. The top notebook is open, displaying a calendar for the month of May. The calendar has a grid layout with days of the week and dates. A white circuit-like overlay with lines and circles is visible on the left side of the image, extending over the notebooks. The notebooks have brown covers, and the top one has a yellow cover. The text 'APPLICATION OF OUTLOOK WITHIN GREENFIELD' is written in white on a blue background to the right of the notebooks.

APPLICATION OF OUTLOOK WITHIN GREENFIELD

- Centralised email system ensures consistent communication.
- Shared calendars support shift planning, visits and meetings.
- Shared mailboxes improve coordination between care teams.
- Creates a structured and traceable communication process (*Microsoft, 2024*).
- Office staff can quickly send rota changes and announcements.
- Reduces reliance on phone calls and improves coordination.

ADVANTAGES OF USING OUTLOOK

- Improves efficiency and organisation of communication.
- Accessible on mobile devices, supporting remote working.
- Integrates with other MS 365 tools.
- Enhances data security and confidentiality of service user information (*Microsoft, 2024. NHS Digital, 2023. ICO, 2023*).

CHALLENGES OF OUTLOOK AND SOLUTIONS

Challenges	Solutions
Some staff may lack digital confidence	Training required
Risk of missed emails	Clear communication protocols needed
Over reliance on email	Combine with teams for urgent issues
Data security and GDPR risks	Follow organisational data protection policies and provide staff training on GDPR compliance
Email overload and time management	Use folders, flags and priority settings. Allocate specific times to check emails

CONCLUSION



- Outlook improves communication, collaboration, and data safety.
- Supports efficient working across community and office settings.
- Challenges can be managed through training and policy development.

REFERENCES

Information Commissioner's Office (2023) *Guide to the UK GDPR*. Available at: <https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources>

Microsoft (2024) *What is Outlook?* Available at: <https://www.microsoft.com/microsoft-365/outlook>

Microsoft (2024) *Microsoft 365 security and compliance*. Available at: <https://learn.microsoft.com/microsoft-365/security>

NHS Digital (2023) *Data security and information governance*. Available at: <https://digital.nhs.uk/data-and-information/looking-after-information>

A dark background with light gray circuit-like lines and nodes. The lines are vertical and horizontal, with small circles at the intersections, resembling a printed circuit board (PCB) layout. The lines are more dense on the left side and become sparser towards the right.

DIGITAL SAFETY ACTION PLAN

Secure Access

Reduce Attack Surface

By hiding infrastructure and requiring authentication, it limits the number of ways attackers can gain entry.

Enables Remote Work

Provides a secure way for employees to access corporate resources from anywhere.

Ensures Compliance

Helps organizations meet data protection regulations (e.g., GDPR, HIPAA).

Prevents data loss

Monitors and controls data transfers to prevent sensitive information from leaving the organization.

EMAIL AWARENESS

Spotting phishing-

? Look for urgent threatening language or offers that seem too good to be true.

Sender verification-

✉ Scrutinize the sender email address for slight misspelling or anomalies , even if the names look familiar.

Link and attachment safety-

📎 Never click links without having first to check to destination avoid unexpected attachments especially zip or executable files.

Process verification-

📺 Verify suspicious requests (write transfers, password requests) through a separate channel like a phone call.

ACTIONABLE STEPS

Pause-

If an email demands instant action stop and think.

Report-

Use the report phishing button in outlook or alert your IT department.

Delete-

Delete suspicious emails immediately after reporting.

Educate-

Participate in simulation training to recognise sophisticated modern attacks.

DATA MANAGEMENT



DATA PROTECTION LEGISLATION CONTROLS HOW YOUR PERSONAL INFORMATION IS USED BY ORGANISATIONS INCLUDING BUSINESS AND GOVERNMENT DEPARTMENT.



IN THE UK DATA PROTECTION IS GOVERNED BY THE **UK GENERAL DATA** PROTECTION REGULATION (UK GDPR) AND THE DATA PROTECTION AT 2018.



AND EVEN RESPONSIBLE FOR USING PERSONAL DATA MUST MAKE SURE THE INFORMATION IS USED FAIRLY, LAWFULLY AND TRANSPARENTLY.



USED FOR SPECIFIED EXPLICIT PURPOSE USED IN A WAY THAT IS ADEQUATE RELEVANT AND LIMITED TO ONLY WHAT IS NECESSARY. KEPT FOR NO LONGER THAN IS NECESSARY.

CONFIDENTIALITY AND COMPLIANCE

Confidentiality and Compliance involved safeguarding sensitive data-such as personal information trade secrets and financial records from unauthorised access, ensuring adherence to legal framework like GDPR, DPA 2018 and HIPAA effective management requires non-disclosure agreement (NDAS).



Key aspects of confidentiality and compliance



Confidentiality is the protection of sensitive information from unauthorised disclosure maintaining a competitive edge and protecting privacy type of information cover personal employees' data protection (Salaries, records) client/customer information business strategies.

RESOURCES

Blog ,Data privacy ,DPO ,GDPR 24/05/23

[8 Ways To Improve Data Security and Data Compliance – Data Privacy Manager](#)

Reference Entry | Robert Ireland ; Chuen Albert Yeung , 2 , Oxford University Press; 2020-04-03

[Data Protection Act 2018](#)

Moore, Michelle,, Moore, Michelle,, Hershey, Pennsylvania:, Information Science Reference.,2017

[Cybersecurity Breaches and Issues Surrounding Online Threat Protection | IGI Global Scientific Publishing](#)

Data Use and Access Act 2025: plans for commencement

[Data \(Use and Access\) Act 2025 - GOV.UK](#)