CICOA

Aging & In-Home Solutions

Transforming AAA Operations Automation in Action

Agenda

Introduction to CICOA

Introduction to Power Automate

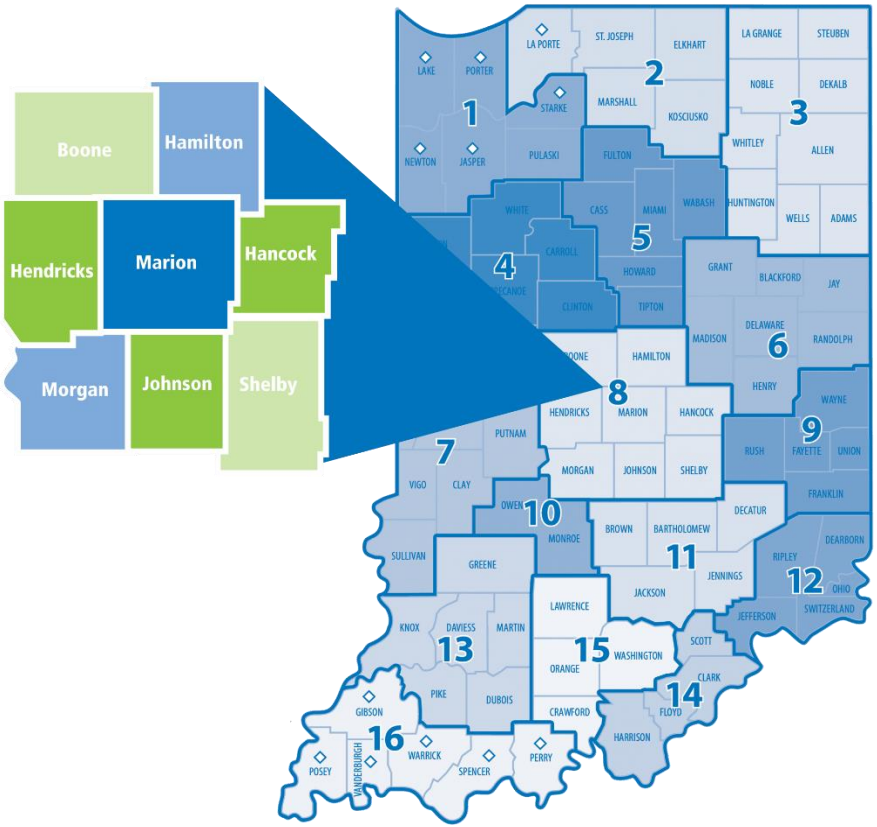
Demos

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

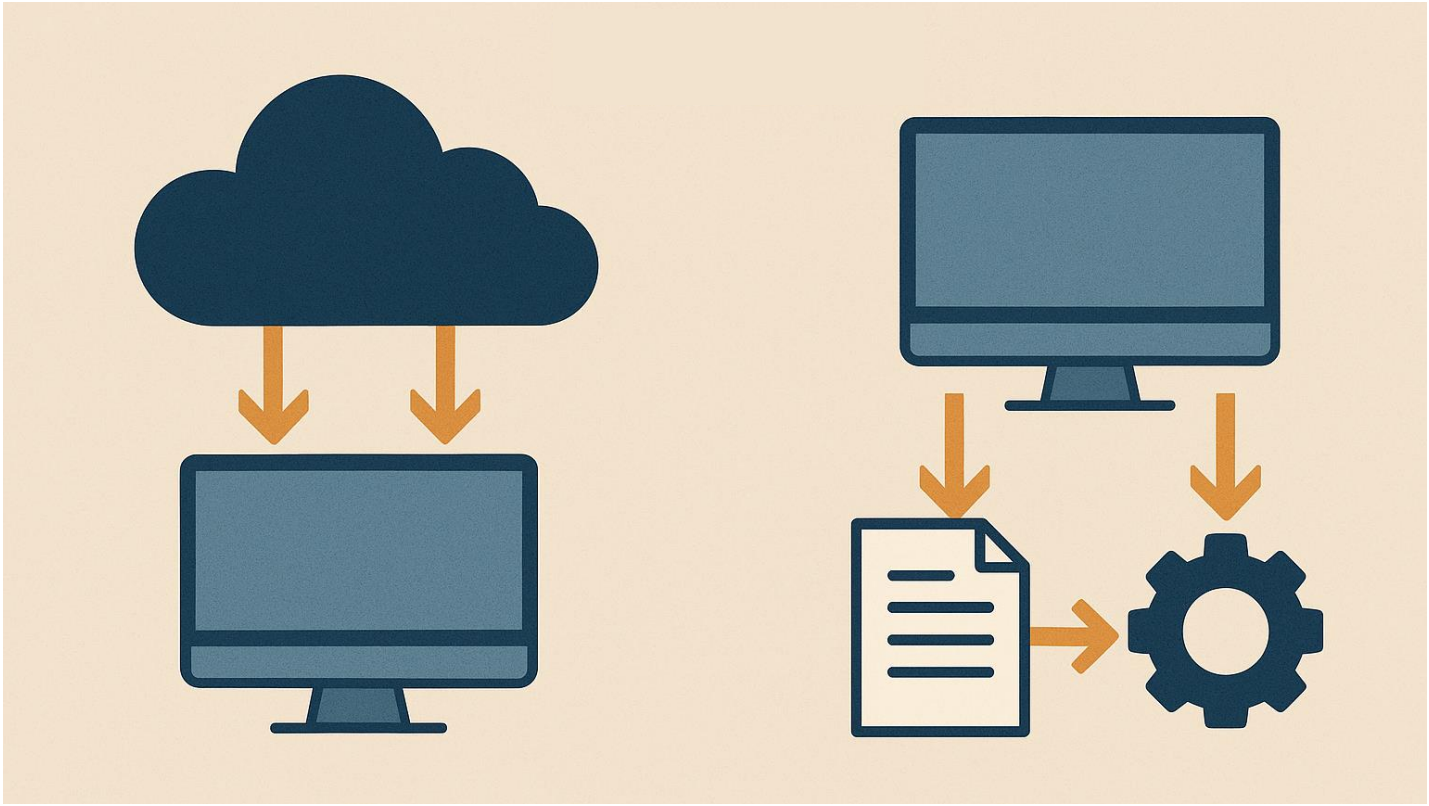
What is Power Automate?

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

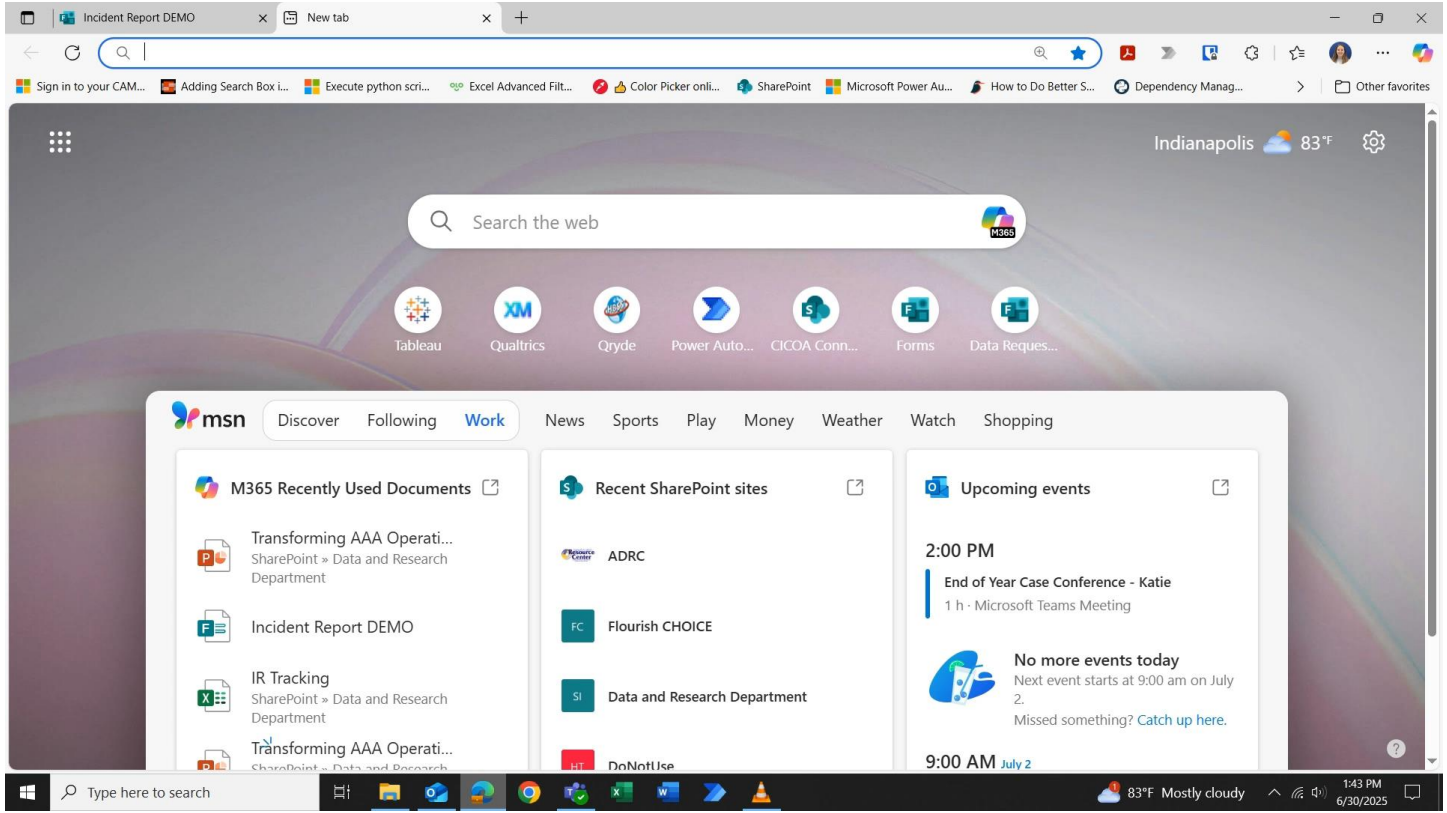
Power Automate Cloud vs Desktop



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

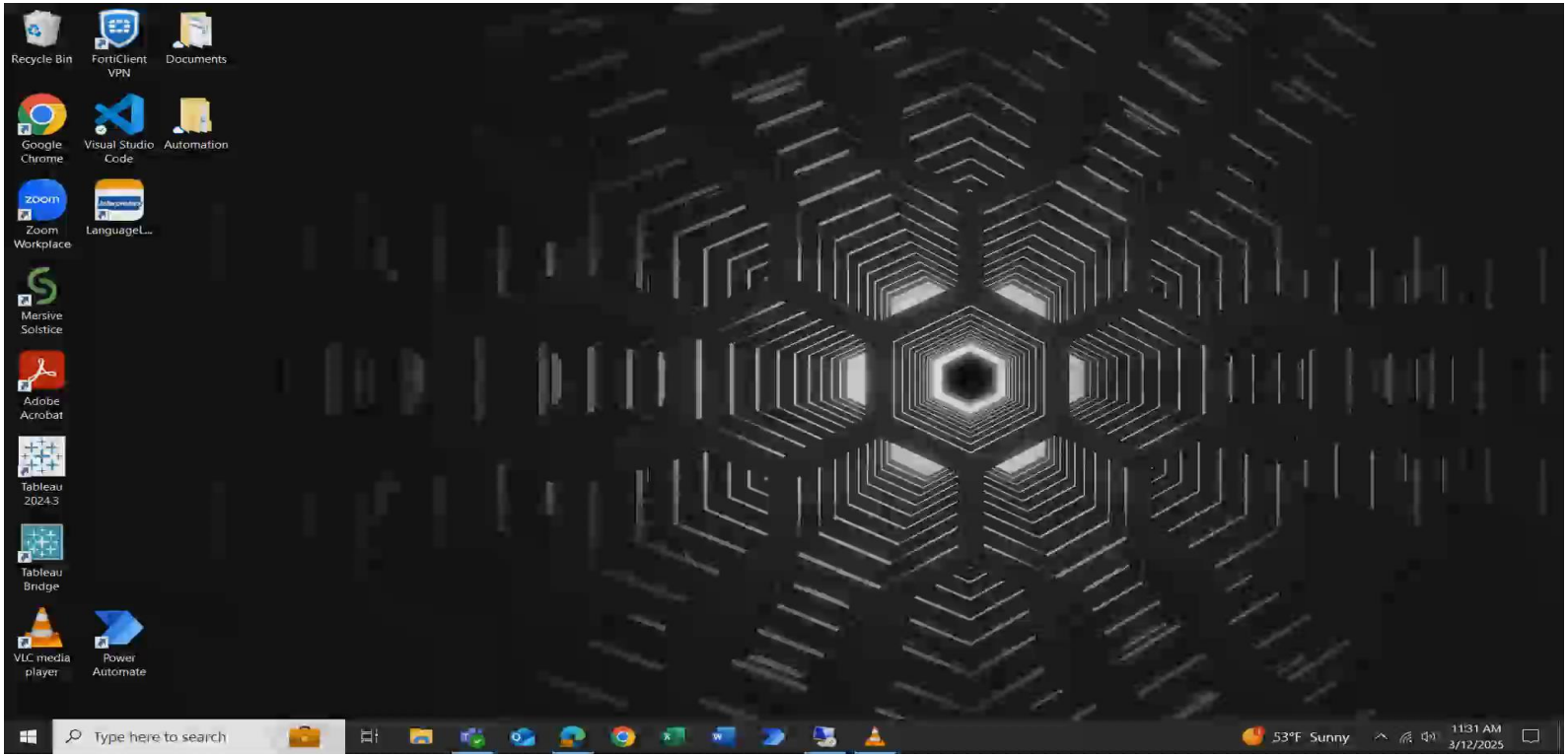
Demo 1: Incident Reporting



Use Cases

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

Demo 2: Pull Data



Use Cases

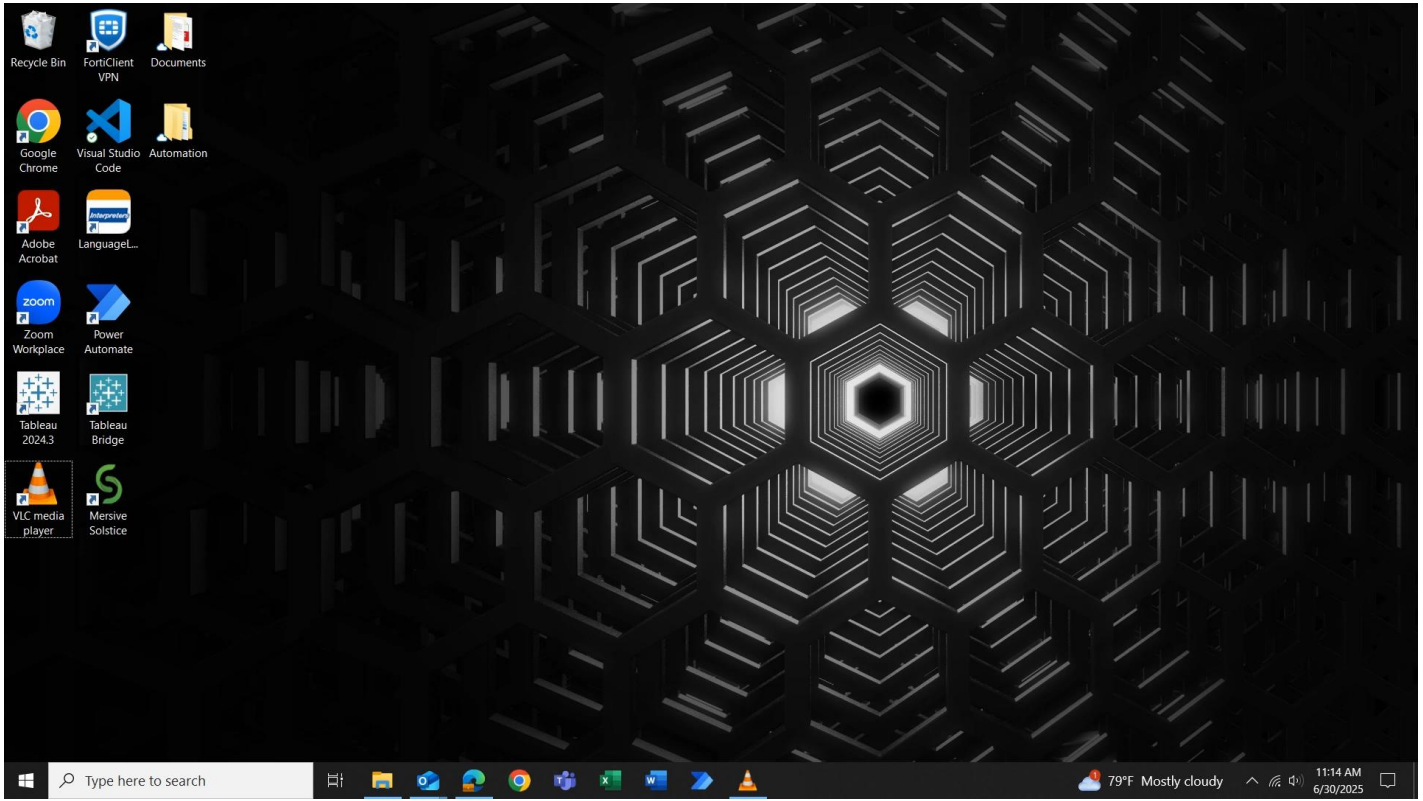
Login to a system

Click through the system to download a report

Move a file to a folder and rename it

Run a python script

Demo 3: Live Demo



Use Cases

When a user sends an email with an attachment...

Save the attachments to a folder automatically

OR

When a user uploads file to a folder...

Send an email

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

Thank you!

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