

Adobe HC Demo Scripts

Adobe Summit 2018

Author	Cognizant	Status – In-progress	Initial Draft – Version 0.1
--------	-----------	----------------------	-----------------------------

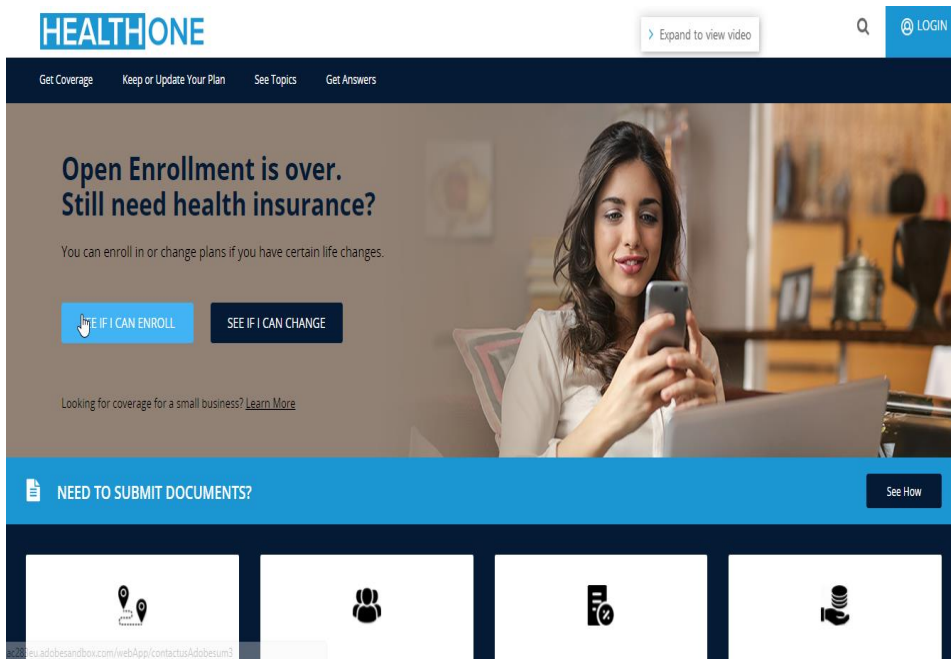
TABLE OF CONTENT

ADOBE HC DEMO SCRIPTS	1
ADOBE SUMMIT 2018	1
SUMMARY	3
ON-BOARDING NEW HEALTHCARE PAYERS WITH RELEVANT PLANS USING MACHINE LEARNING	3
ENGAGING NEW HEALTHCARE PAYERS THROUGH CONSISTENT AND RELEVANT JOURNEYS	8
HEALTHCARE POLICY RENEWAL	13
TARGETING HEALTHCARE PAYERS ENGAGING THEM FOR HEALTHCARE ASSESSMENT	16
DETAILED STEPS:	19
Opening ACM.....	20
Navigating to the Explorer View:.....	21
OPERATION:	22
On-boarding new customers.....	22
Engaging New Healthcare Payers through consistent and relevant journeys.....	24
Policy Renewal.....	25
Healthcare Assessment	29
TECHNICAL FLOW	33
Opening ACM.....	33
Navigating to the Explorer View	34
ON-BOARDING NEW HEALTHCARE PAYERS WITH RELEVANT PLANS USING MACHINE LEARNING	35
Adobe Campaign	35
MS Dynamics	39
ENGAGING NEW HEALTHCARE PAYERS THROUGH CONSISTENT AND RELEVANT JOURNEYS	43
Adobe Campaign	43
REMINDING HEALTHCARE PAYERS ABOUT POLICY EXPIRATION AND RENEWAL.....	44
Adobe Campaign	44
TARGETING HEALTHCARE PAYERS ENGAGING THEM FOR HEALTHCARE ASSESSMENT	45
Adobe Campaign	45
MS Dynamics	46

Summary

On-boarding New Healthcare Payers with relevant plans using Machine Learning

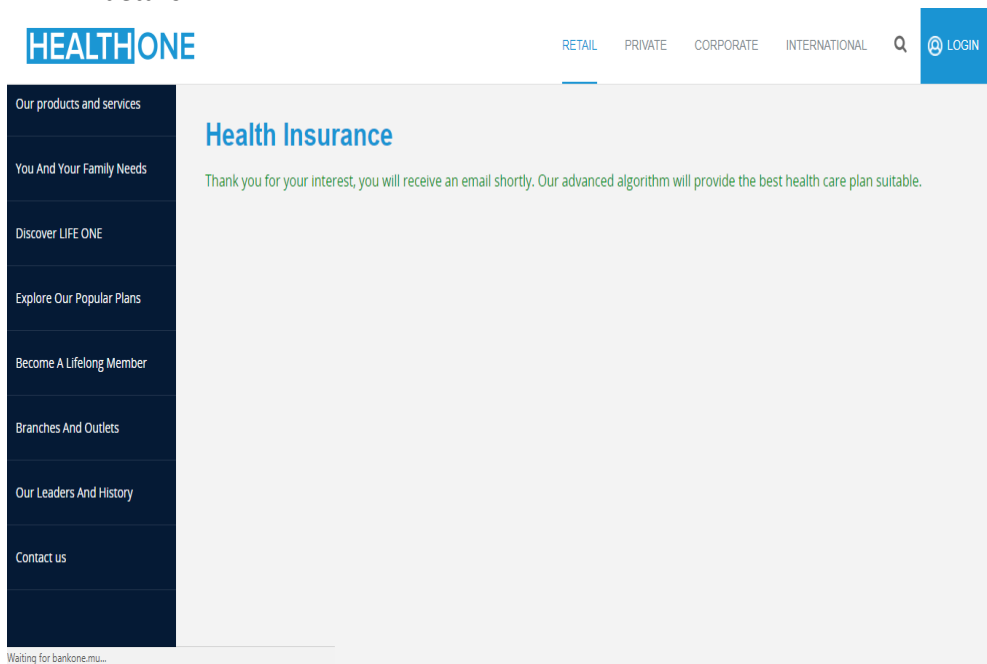
- User visits the Healthcare insurance home page and shows interest in new enrolment and clicks on “SEE IF I CAN ENROLL”



- On click of the button user navigates to below landing page to enter the basic details

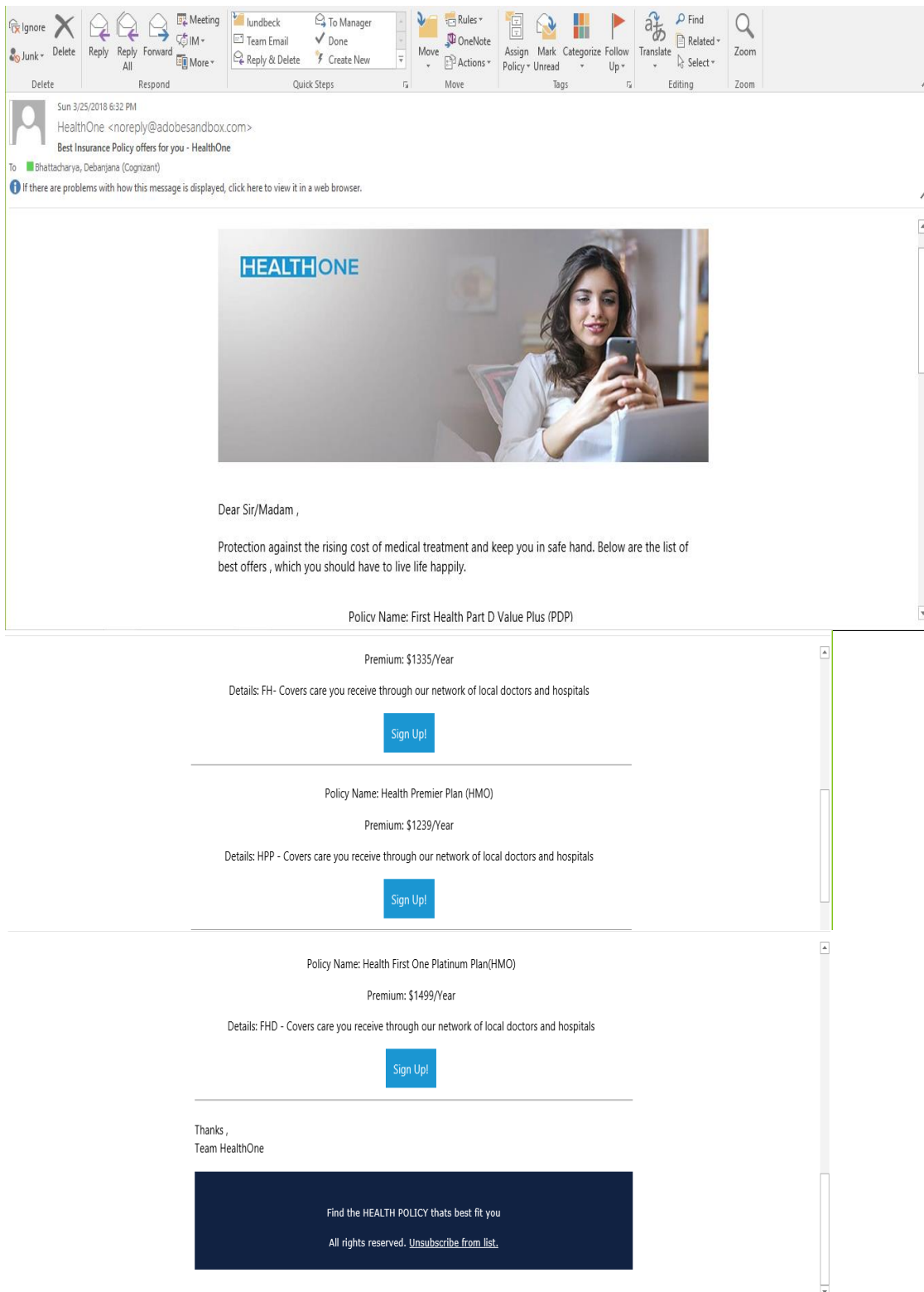
- User fills in details of user age, email, mobile, Country, State, salary & Current Premium & submits

- User is taken to a page thanking him/her for his/her interest & that an email has been sent with offer details



- Above user details captured in the HealthOne page by Adobe Campaign is sent to Microsoft Machine Learning
- Microsoft Machine Learning platform classifies the user as high, med, low relevance based on supplied data & pushes it into Adobe Campaign.
- Adobe Campaign platform selects relevant top 3 healthcare policy offers based on the relevance score value received from ML & sends a personalized email with the relevant offers

- User receives personalized email with top 3 healthcare policy offers



- User clicks on any one of the offer links in the email
- User is taken to HealthOne site where he/she needs to fill up some additional details like first name, last name and email etc. and submits for policy purchase.

[Our products and services](#)[You And Your Family Needs](#)[Discover LIFE ONE](#)[Explore Our Popular Plans](#)[Become A Lifelong Member](#)[Branches And Outlets](#)[Our Leaders And History](#)[Contact us](#)

Health Insurance

Personal Information

*Required fields

First Name *

Debanjana

Last Name

Bhattacharya

Email *

debanjana.bhattacharya@cognizant.com

Bank*

City Bank

Policy Details

Policy Number: 11113

Policy Name: First Health Part D Value Plus (PDP)

Premium: \$1335/Year

Policy Details: FH- Covers care you receive through our network of local doctors and hospitals

Clear

Submit

[Learn More About
Virtual Visits](#)

[Simpler Ways to
Manage Prescription](#)

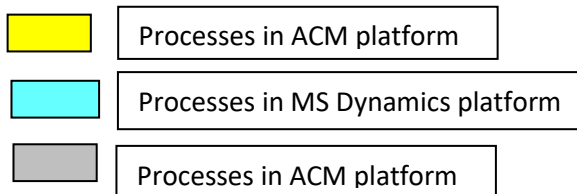
[Donate and Support
Others in Need](#)

[Locate Us](#)

- Once submitted, user is taken to a page thanking him/her and informing that he/she will soon receive an email with order confirmation

The screenshot shows the HEALTH ONE website interface. On the left is a dark blue sidebar with links: "Explore Our Popular Plans", "Become A Lifelong Member", "Branches And Outlets", "Our Leaders And History", and "Contact us". The main content area has a top navigation bar with "RETAIL", "PRIVATE", "CORPORATE", and "INTERNATIONAL" tabs, a search icon, and a "LOGIN" button. Below the navigation, there is a registration form with fields for "First Name" (Debanjana), "Last Name" (Bhattacharya), "Email" (debanjana.bhattacharya@cognizant.com), and "Bank" (City Bank). Below the form is a "Policy Details" section showing: Policy Number: 11113, Policy Name: First Health Part D Value Plus (PDP), Premium: \$1335/Year, and Policy Details: FH- Covers care you receive through our network of local doctors and hospitals. At the bottom of the form are "Clear" and "Submit" buttons.

- Details captured by Adobe Campaign are sent to MS Dynamics for purchase order creation
- MS Dynamics sends the generated order ID back to ACM for the user/customer
- MS Dynamics also sends an email to the user with order confirmation
- User receives an email for confirmation of the healthcare policy purchase with order ID



Sun 3/25/2018 6:46 PM
Life One <customerservice@l1o.com>
Health Care Plan Purchase Order Created CRM:0005129
To ■ Bhattacharya, Debanjana (Cognizant)



Hi Debanjana Bhattacharya ,

Greetings from First One Insurance.

Congratulations!, your order has been confirmed for the selected Life One Health Care Policy. Please find your policy along with order confirmation below:

Policy #: **11113** ,

Policy Name: **First Health Part D Value Plus (PDP)** ,

Premium: **\$499.00**

Order #: **ORD-01128-P8V1K6** ,

Order Date: **3/25/2018 6:46 PM**

Thanks ,
Team Life One

Find the HEALTH POLICY that's best fit you
All rights reserved. Unsubscribe from list.

Engaging New Healthcare Payers through consistent and relevant journeys

- User receives Welcome email with directions to log into the HealthOne website online and complete their profile details online

Sun 3/25/2018 7:08 PM
HealthOne <no-reply@adobesandbox.com>
We've got an exclusive offer for you - HealthOne Insurance
To: ■ Bhattacharya, Debanjana (Cognizant)
If there are problems with how this message is displayed, click here to view it in a web browser.

If you are unable to view this message correctly, [click here](#)



Hi Debanjana,

Greetings from HealthOne Insurance.

Congratulations!, you have made a great choice for your insurance plan. Thank you for registering, please find your policy details below:

Policy #: 11113

Policy Name: First Health Part D Value Plus (PDP)

Premium: \$1335/Year

In order to better serve you please update your profile by clicking the link below.

[Update Profile!](#)

Thanks ,
Team Healthone

Find the HEALTH POLICY thats best fit you

All rights reserved. [Unsubscribe from list.](#)

- User clicks on the “Update Profile” link
- User is taken to the HealthOne portal update profile page

HEALTHONE

RETAILPRIVATECORPORATEINTERNATIONALQLOGIN

Our products and services

You And Your Family Needs

Discover LIFE ONE

Explore Our Popular Plans

Become A Lifelong Member

Branches And Outlets

Our Leaders And History

Contact us

Health Insurance

Personal Information

First Name*

Debanjana

Last Name

Bhattacharya

Email

debanjana.bhattacharya@cognizant.com

Mobile*

0908 879 6865

Address*

ohio

State/Province Code

NJ

Zip/Post Code

135

Country

USA

Submit

Learn More About
Virtual Visits

>

Simpler Ways to
Manage Prescription

>

Donate and Support
Others in Need

>

Locate Us

>

HEALTHONE

Our journey

Our Annual reports

Join Us

Feedback & Complaints

Exchange Rates

Retail

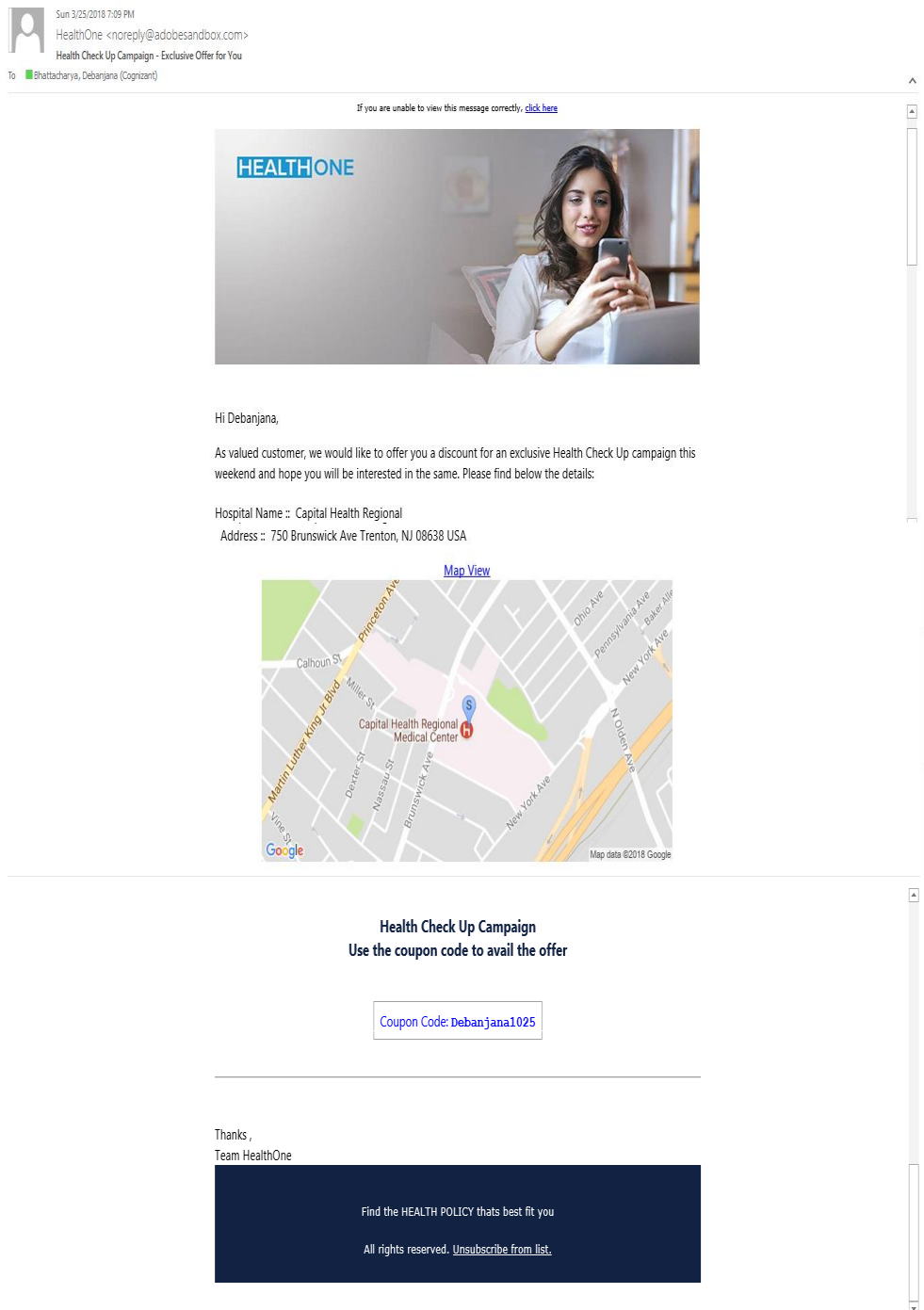
Private

Corporate

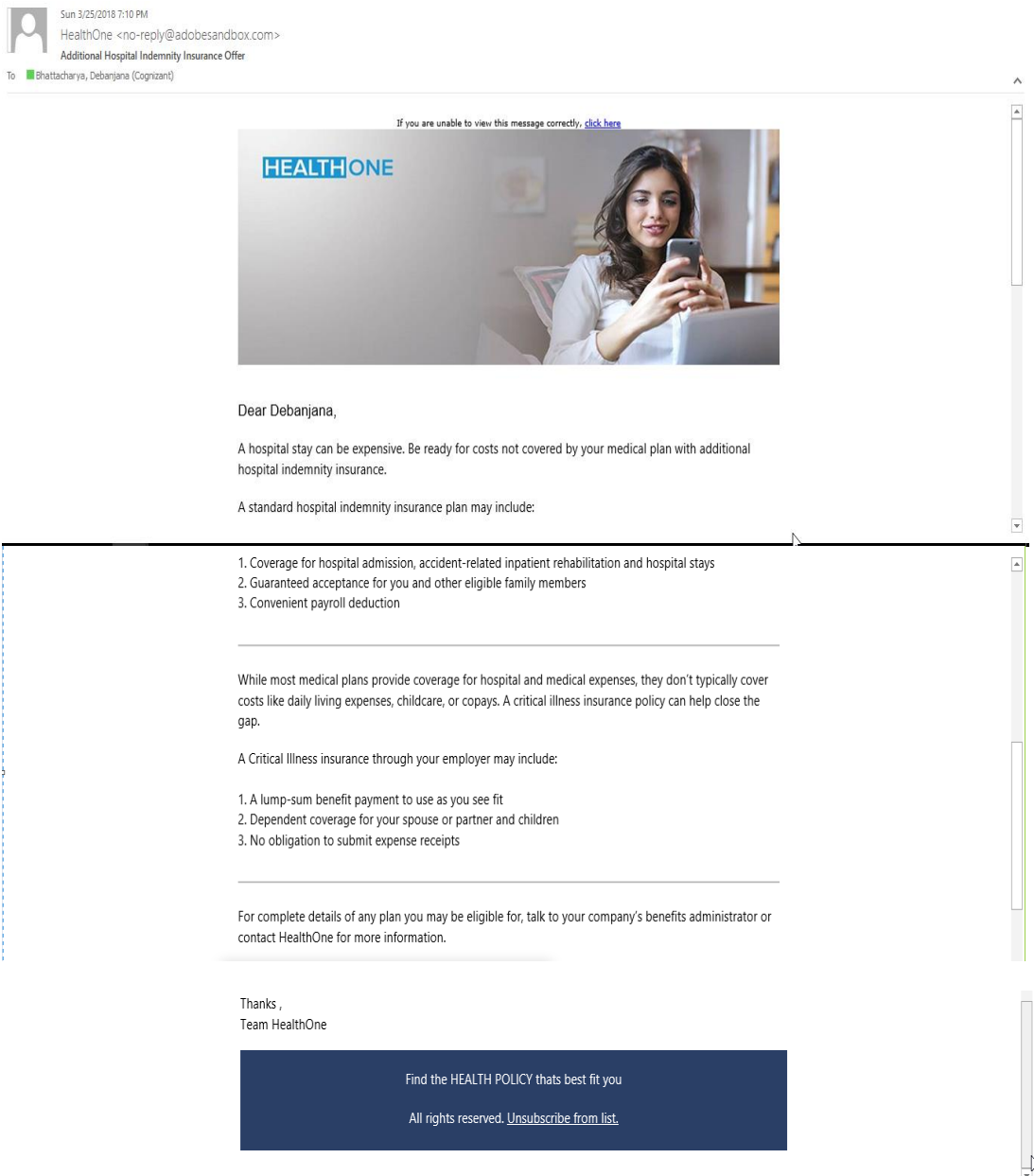
International

- User inputs additional details & submits

- After a stipulated time, User receives an email with offer with coupon code on discounted health checkup at a clinic near their registered address, the email has a google map embedded for location direction

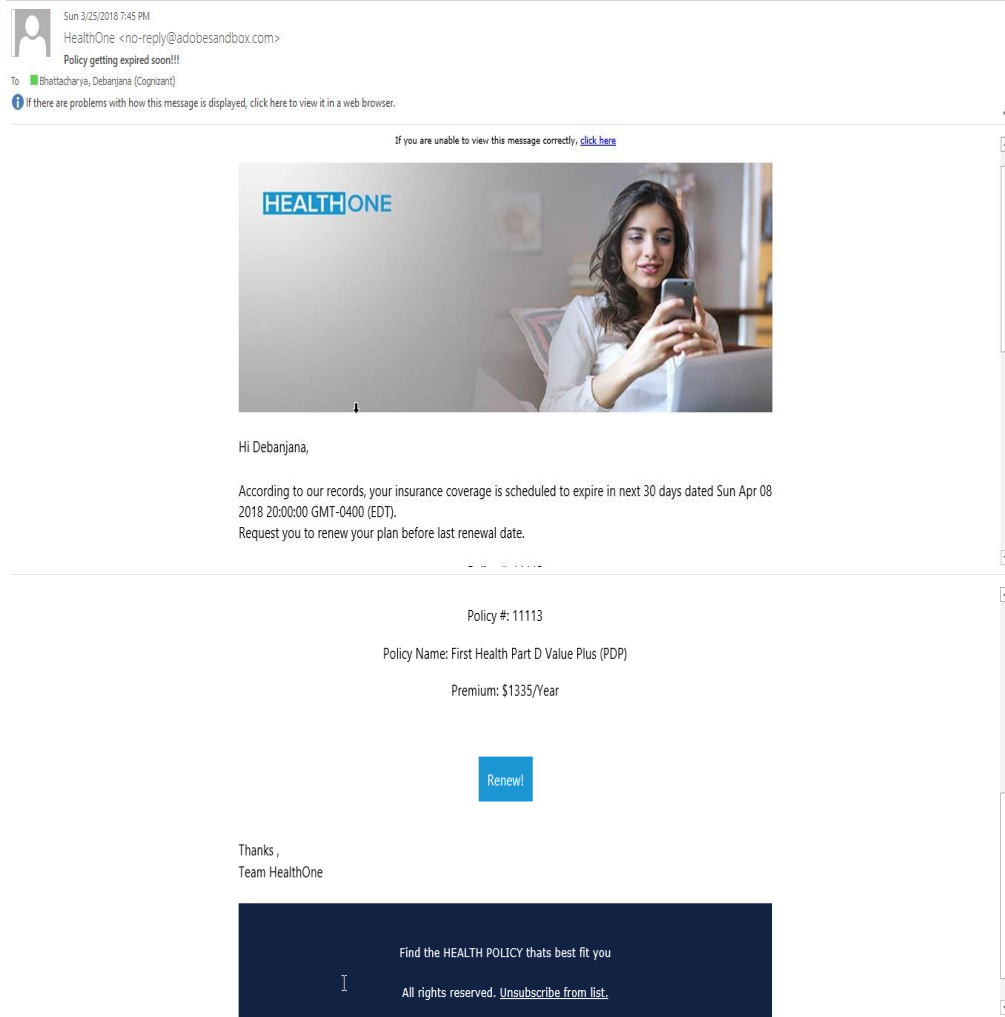


- After a stipulated time, User receives an informative email on importance of healthcare plans



Healthcare Policy Renewal

- User receives a personalized email alert that his/her purchased Healthcare policy is about to expire



- User clicks on the “Renewal” link in the email
- User is taken to the HealthOne portal Renewal page

HEALTHONE

RETAIL PRIVATE CORPORATE INTERNATIONAL

Our products and services

You And Your Family Needs

Discover LIFE ONE

Explore Our Popular Plans

Become A Lifelong Member

Branches And Outlets

Our Leaders And History

Contact us

Renew Health Insurance

Personal Information

*Required fields

First Name *
Debanjana

Last Name
Bhattacharya

Email *
debanjana.bhattacharya@cognizant.com

Bank*
City Bank

Policy Details

Policy Number: 11113

Policy Name: First Health Part D Value Plus (PDP)

Premium: \$1335/Year

HEALTHONE

RETAIL PRIVATE CORPORATE INTERNATIONAL

Premium: \$1335/Year

Gender Date of Birth Tobacco Use

Spouse M | No

Child one | No

Child two | No

Clear Renew

Learn More About Virtual Visits

Simpler Ways to Manage Prescription

Donate and Support Others in Need

Locate Us

Our journey Retail

- User inputs required details and submits
- User is taken to a page with thanks him/her for policy renewal and informs that he/she will receive an email shortly confirming renewal of the policy

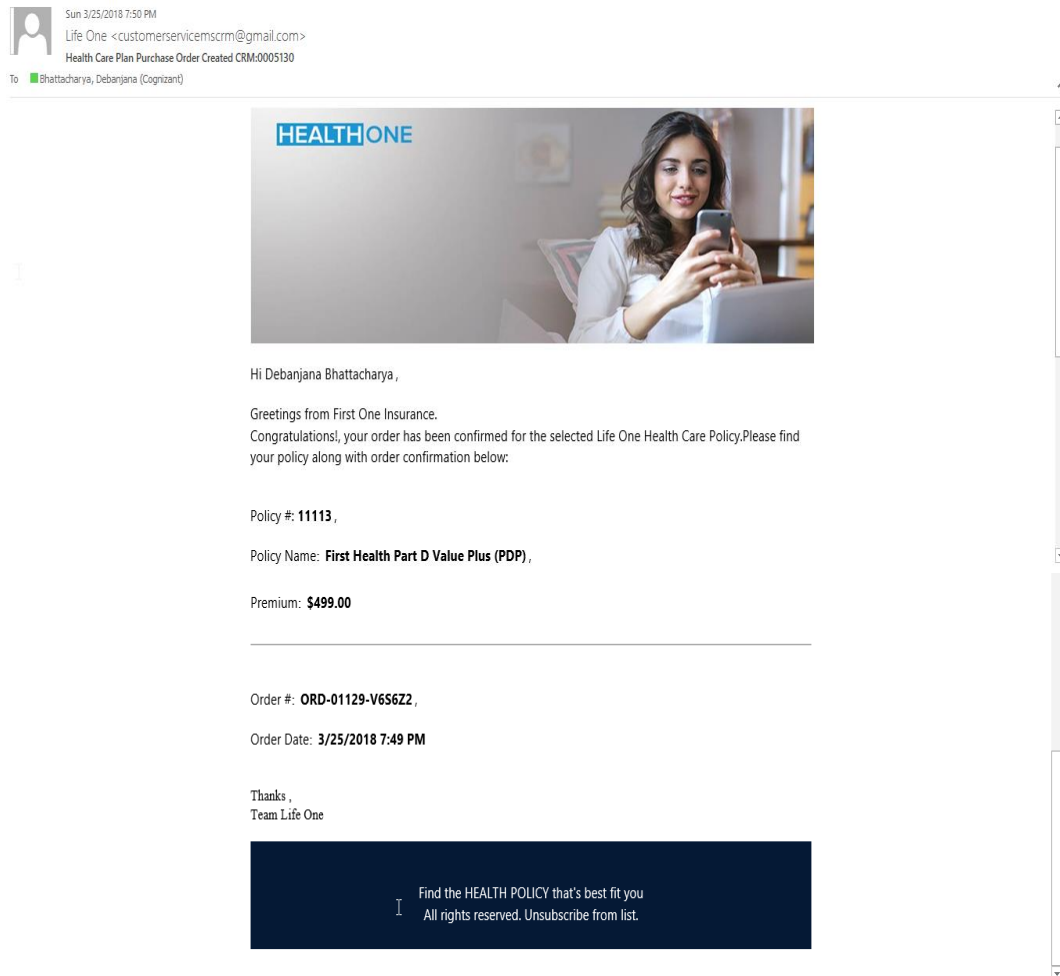
[Our products and services](#)[You And Your Family Needs](#)[Discover LIFE ONE](#)[Explore Our Popular Plans](#)[Become A Lifelong Member](#)[Branches And Outlets](#)[Our Leaders And History](#)[Contact us](#)

Renew Health Insurance

Thank you for renewing your information. you will receive an email shortly about the order confirmation.

- The details for renewal are captured by Adobe Campaign and are sent to MS Dynamics for policy renewal order
- MS Dynamics updates the user records
- MS Dynamics sends a renewal confirmation email to User with policy details

- User receives an email with policy renewal details



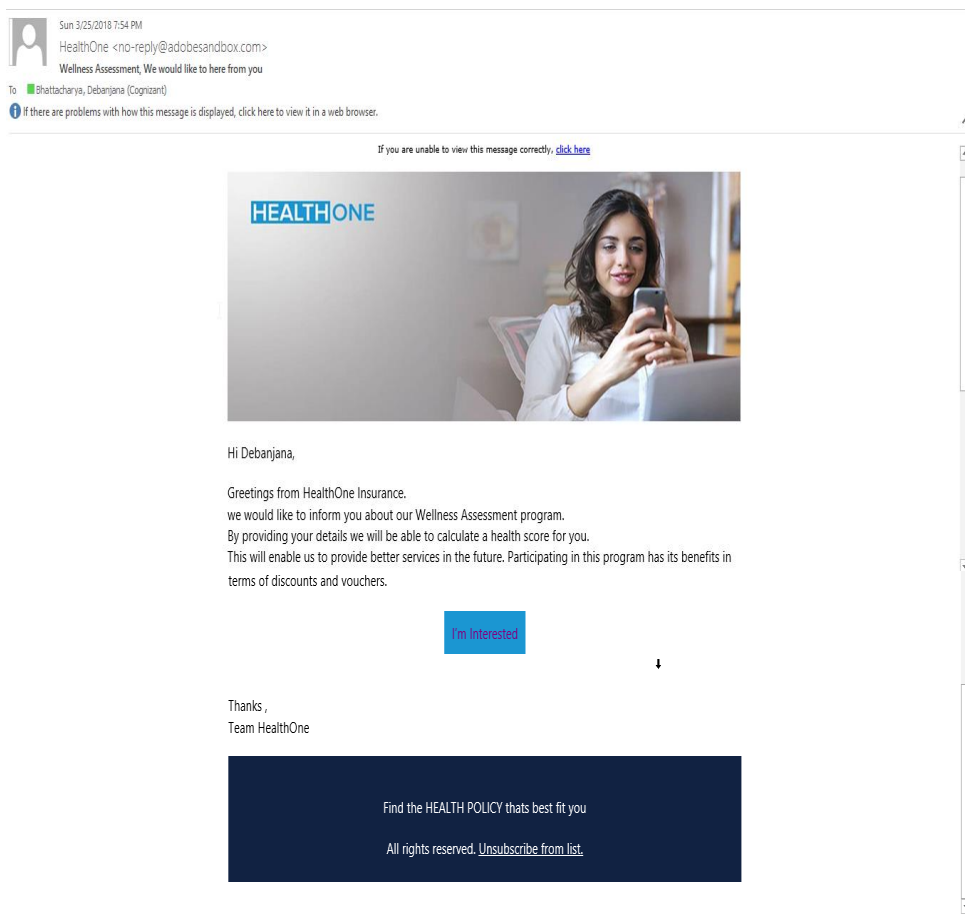
Processes in ACM platform



Processes in MS Dynamics platform

Targeting Healthcare Payers engaging them for Wellness Assessment

- User receives a personalized email on wellness assessment with details of the assessment program from HealthOne



- User clicks on the “I’m Interested” button in the email
- User is taken to the HealthOne portal for wellness assessment

A screenshot of the HealthOne Wellness Assessment portal. The top navigation bar includes the 'HEALTHONE' logo, a home icon, and links for 'WELLNESS ASSESSMENT', 'RETAIL', 'PRIVATE', 'CORPORATE', 'INTERNATIONAL', a search icon, and 'Sign In'. Below the navigation bar, the breadcrumb 'Home > Wellness Assessment' is visible. The main heading is 'Wellness Assessment'. Underneath, there is a section titled 'Wellness Assessment Questions'. The first question is 'Member Name' with a text input field. The second question is 'In general, would you say your health is?' with a dropdown menu. The third question is 'In the past year have you had:' with a dropdown menu. The fourth question is 'In the past 7 days, how much pain have you felt?' with a dropdown menu. The fifth question is 'In last week do you had problems with constipation' with a dropdown menu. At the bottom, there is a small icon and the text '1/1'.

In last week do you had problems with constipation

☒ No ☐ Yes

In general, how satisfied are you with your life?

In a typical week, how much alcohol do you drink?

How is the condition of your mouth and teeth ?

Does your home have rugs in the hallway?

☒ No ☐ Yes

Does your home have handrails on the stairs?

☒ No ☐ Yes

Does your home have grab bars in the bathroom?

☒ No ☐ Yes

Does your home have good lighting?

☒ No ☐ Yes

Do you need other's help to perform daily activiti

☒ No ☐ Yes

Do you need other's help to perform daily activiti

☒ No ☐ Yes

Do you know how to use a first aid kit ?

☒ No ☐ Yes

Do you have any problems with your hearing?

☒ No ☐ Yes

Do you exercise 30 mins in week ?

☒ No ☐ Yes

Do you ever have 5 or more alcoholic drinks atonce

☒ No ☐ Yes

Do you eat healthy food and avoid fatty food ?

☒ No ☐ Yes

Do anyone have concern about your money ?

☒ No ☐ Yes

Any problems in staying or falling asleep ?

☒ No ☐ Yes

Do you always fasten your seat belt while driving

☒ No ☐ Yes

Submit

- User inputs required details and submits
- Assessment details are captured by MS Dynamics platform
- MS Dynamics generates a score (Excellent/Good/Average) for the user
- MS Dynamics sends this score to Adobe Campaign platform
- Adobe Campaign platform generates the top policy offers based on the score and other details for the user
- Adobe Campaign sends a personalized email to user with offer details
- The User receives a personalized email with customized offers based on his/her assessment score



Sun 3/25/2018 7:56 PM
HealthOne <no-reply@adobesandbox.com>
Dental Checkup Offer Only For You

To: ■ Bhattacharya, Debanjana (Cognizant)

📧 If there are problems with how this message is displayed, click here to view it in a web browser.

If you are unable to view this message correctly, [click here](#)



Hi Debanjana,

Greetings from HealthOne Insurance. We are pleased that you decided to participate in our Wellness assessment program. To express our gratitude, here is an offer for you.



Offer Details: 20% off on your
first visit - American Dental
Association

In order to redeem this offer and to know more about it click the link below.

[Learn More!](#)

Thanks,
Team HealthOne

Find the HEALTH POLICY thats best fit you

All rights reserved. [Unsubscribe from list.](#)



Processes in ACM platform

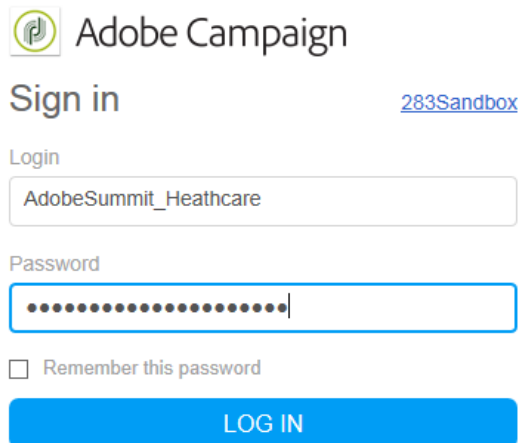


Processes in MS Dynamics platform

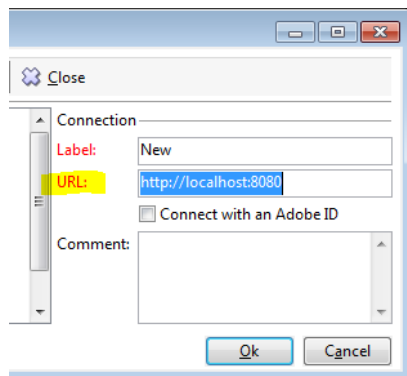
Detailed Steps:

Opening ACM

- Open Adobe Campaign from the Main menu.
- Once the login page opens, click on the top right corner.



- In the URL field enter: <https://ac283eu.adobesandbox.com> . You can provide a meaningful name in the 'Label' field too. Click Ok

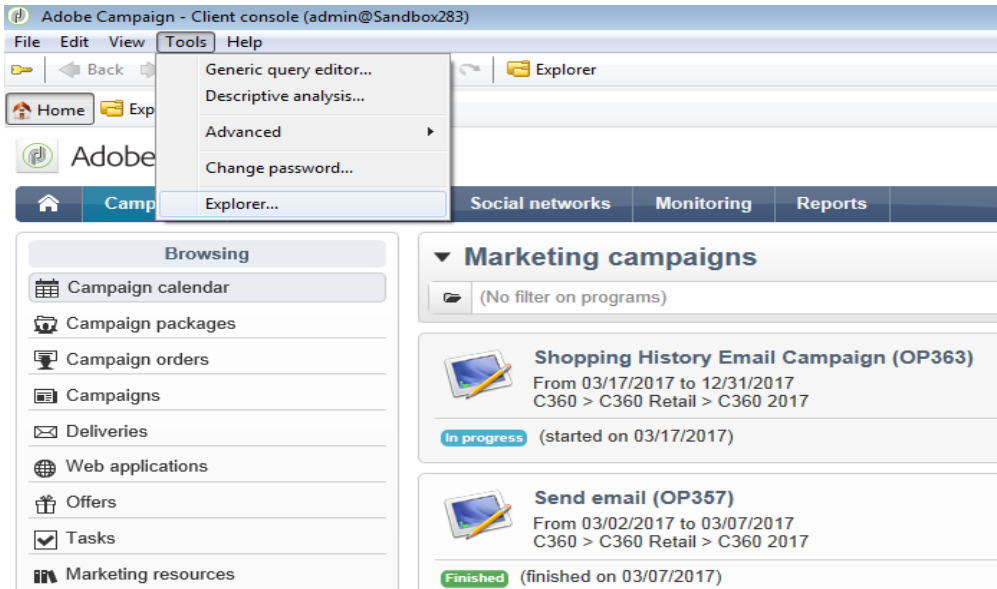


- In the login page use the credentials :
Login: AdobeSummit_Heathcare
Password: AdobeSummit_Heathcare

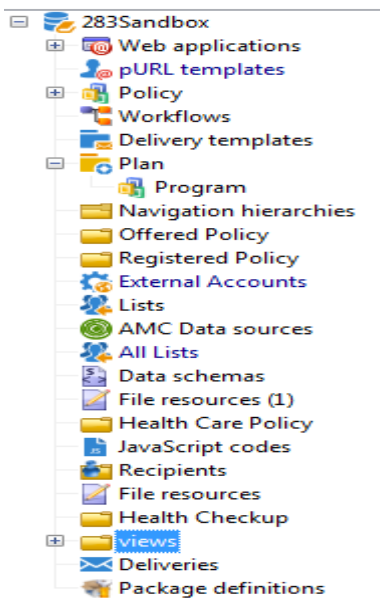
You should be able to login into Adobe Campaign.

Navigating to the Explorer View:

- After a successful login, user has to go to the Explorer view.
- Click on the Tools available in menu bar and choose 'Explorer...' from the drop down.



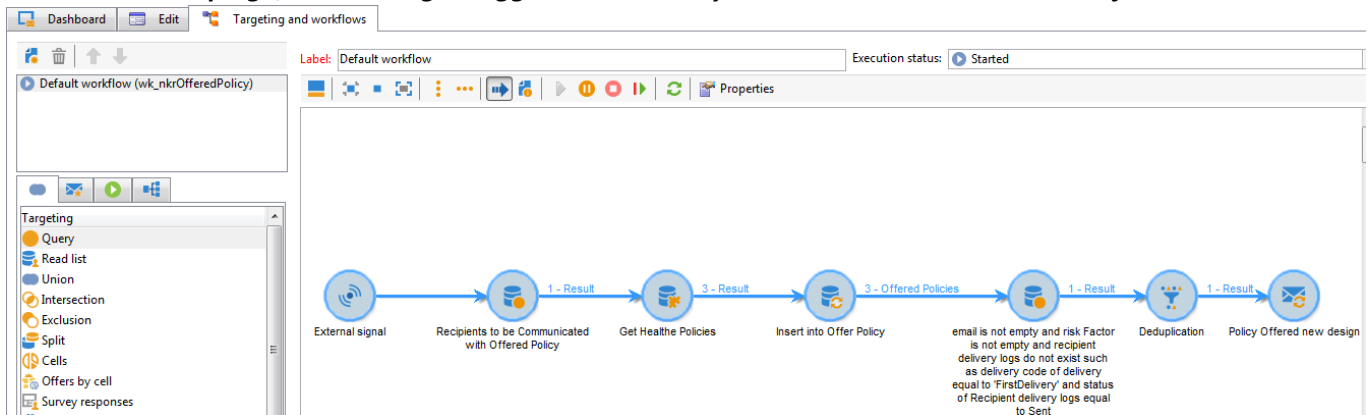
In explorer the associated folder structure will look as below,



Operation:

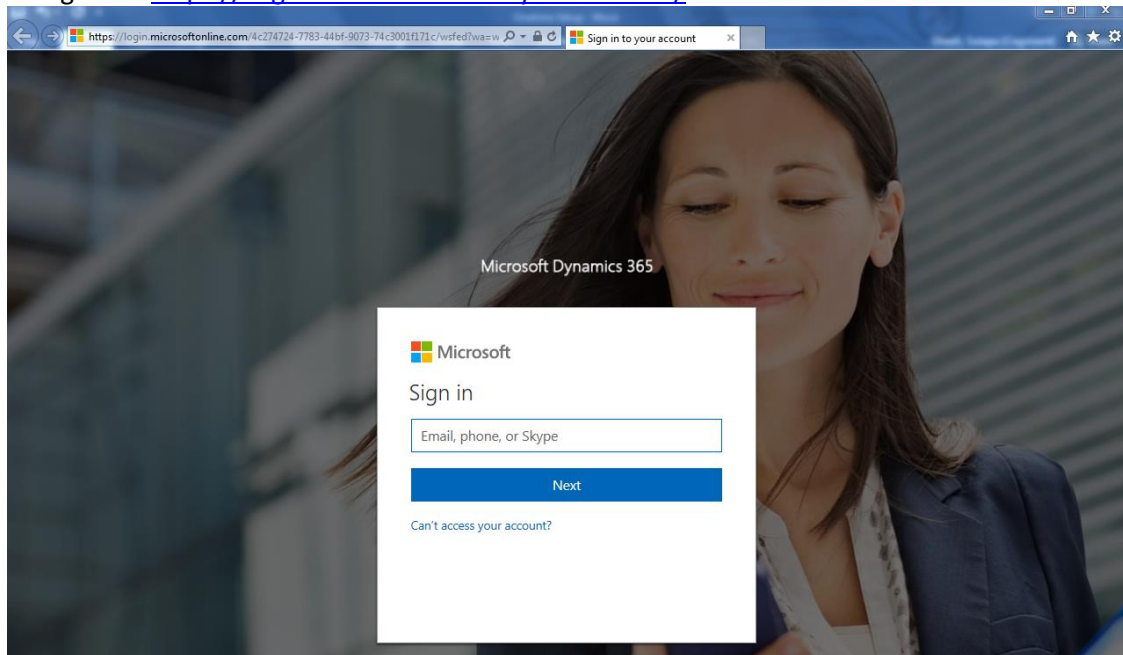
On-boarding new customers

Below is the campaign, which will get trigger automatically when user submits the interest form.

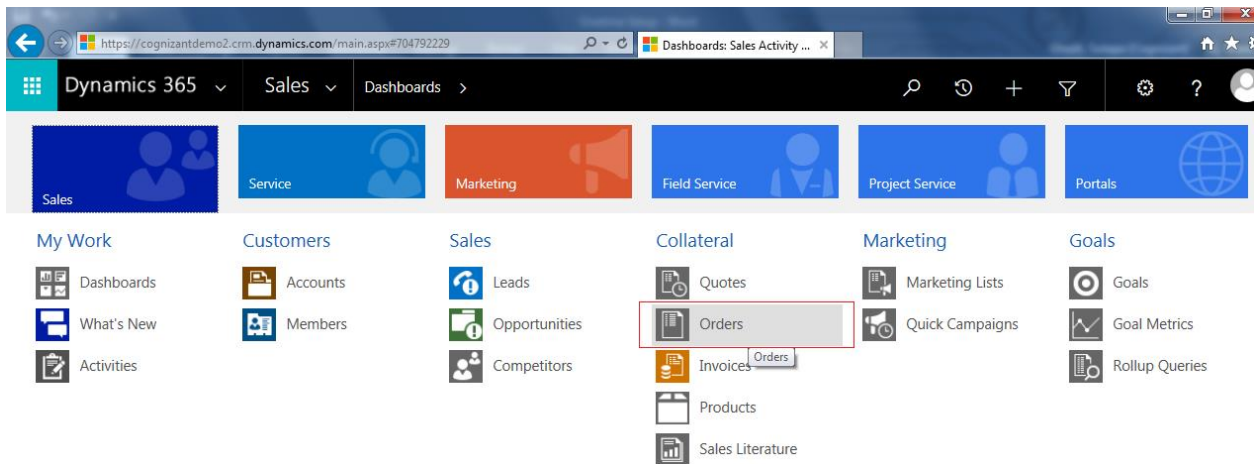


Below is the MSD details for the above operation

1. Navigate to <https://cognizantdemo2.crm.dynamics.com/>



2. Use the credentials:
Login: adobe@cognizantdemo2.onmicrosoft.com
Password: [test@1234](#)
3. Navigate to **Sales → Orders**



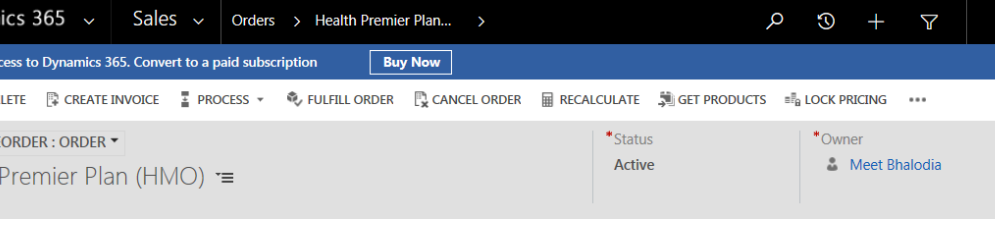
4. The orders that are created in Adobe would be displayed in the below screen of D365-

Order Number	Policy Name	Policy Number	Customer	Email (Customer)	Policy Premium
ORD-01109-V9G4D6	Health Standard Plan (...)	11125	Rajneesh	rajneesh.kumar6@cognizant.co...	\$649.00
ORD-01108-T3G7G0	Health Standard Plan (...)	11125	Rajneesh	rajneesh.kumar6@cognizant.co...	\$649.00
ORD-01107-X5B0M4	Health Premier Plan (...)	11111	Adam Addis	adamaddis85@gmail.com	\$1,239.00
ORD-01106-B5Q3X8	Health First One Platin...	11115	Kumar Ankur	kumar.ankur@cognizant.com	\$1,499.00
ORD-01105-N1N7X7	Health Premier Plan (...)	11111	testdata1 restdata1	kumar.ankur@cognizant.com	\$1,239.00
ORD-01104-X3G8C1	Health First One Platin...	11115	Adam Addis	adamaddis85@gmail.com	\$1,499.00
ORD-01103-P0D3J0	First Health Part D Val...	11113	kr1 an1	kumar.ankur@cognizant.com	\$1,335.00
ORD-01102-N4D7C5	First Health Part D Val...	11113	kr An	kumar.ankur@cognizant.com	\$1,335.00
ORD-01101-Q3D6H6	Health Premier Plan (...)	11111	Adam Addis	adamaddis85@gmail.com	\$1,239.00
ORD-01100-T2D7R5	Health Premier Plan (...)	11111	Kum89 Ank89	kumar.ankur@cognizant.com	\$1,239.00
ORD-01099-V8F9Y0	Health Premier Plan (...)	11111	Kum89 Ank89	kumar.ankur@cognizant.com	\$1,239.00
ORD-01098-J5Y4K1	Health FirstOne Total...	11123	Swayam Rath	swayam.rath@cognizant.com	\$489.00
ORD-01097-P1V7S7	Health Rx Select (PDP)	11119	Swayam Rath	swayam.rath@cognizant.com	\$449.00
ORD-01096-Q8K0X6	First Health Part D Val...	11113	kumar Ankur2	kumar.ankur@cognizant.com	\$1,335.00
ORD-01095-K1D1K0	Health Silver Plan (Re...	11117	Adam Addis	adamaddis85@gmail.com	\$499.00

The list displays the below fields –

- Order Number – The unique Order no that is generated when the order record is created in CRM. This is sent to the email that is triggered from CRM when order is created.
- Policy Name – Policy Name corresponding to the Order, which is obtained from Adobe through service.
- Policy Number - Policy Number corresponding to the Order, which is obtained from Adobe through service.
- Customer – Customer/Member Lookup field who is associated with the order.
- Email – Email address of the Customer who is associated with the order.

- The list is sorted in descending order of “Created On” field – the recent most order is at the top.



https://cognizantdemo2.crm.dynamics.com/main.aspx#276763554

PurchaseOrder: Health Pre...

Dynamics 365 Sales Orders Health Premier Plan...

Don't Lose Access to Dynamics 365. Convert to a paid subscription Buy Now

NEW DELETE CREATE INVOICE PROCESS FULFILL ORDER CANCEL ORDER RECALCULATE GET PRODUCTS LOCK PRICING

PURCHASEORDER : ORDER

Health Premier Plan (HMO)

Status: Active

Owner: Meet Bhalodia

ORDER DETAILS

ORDER INFORMATION

*Order Number **ORD-01107-X580M4**

Policy Number 11111

*Policy Name Health Premier Plan (HMO)

Policy Premium \$1,239.00

Bank Name City-Bank

SOCIAL PANE

ACTIVITIES

All | Add Phone Call

Adam Addis; Life One;...
Health Care Plan Purchase Order Created
CRM:0005108
Hi Adam Addis, Greetings from Life O... Yesterday

NOTES

MEMBER DETAILS

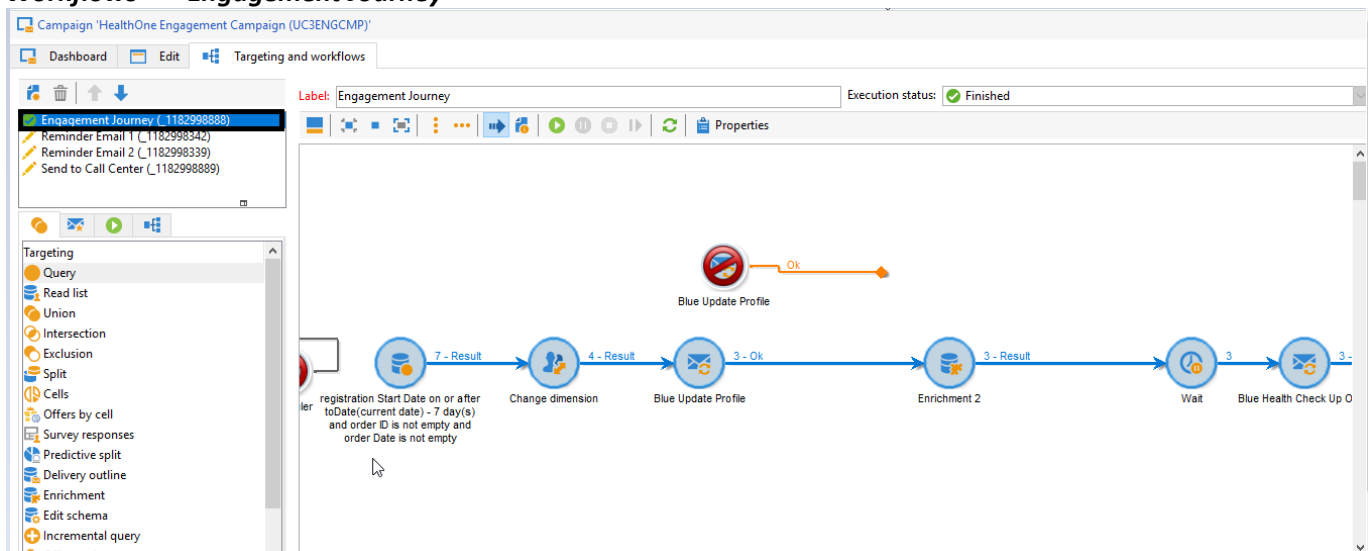
*Name Adam Addis

Email adamaddis85@gmail.com

Mobile Phone 0984 767 3221

Age 30

283Sandbox -> Plan -> Program -> Open the "HealthOne Engagement Campaign" -> Navigate to "Targeting and Workflows" -> Engagement Journey

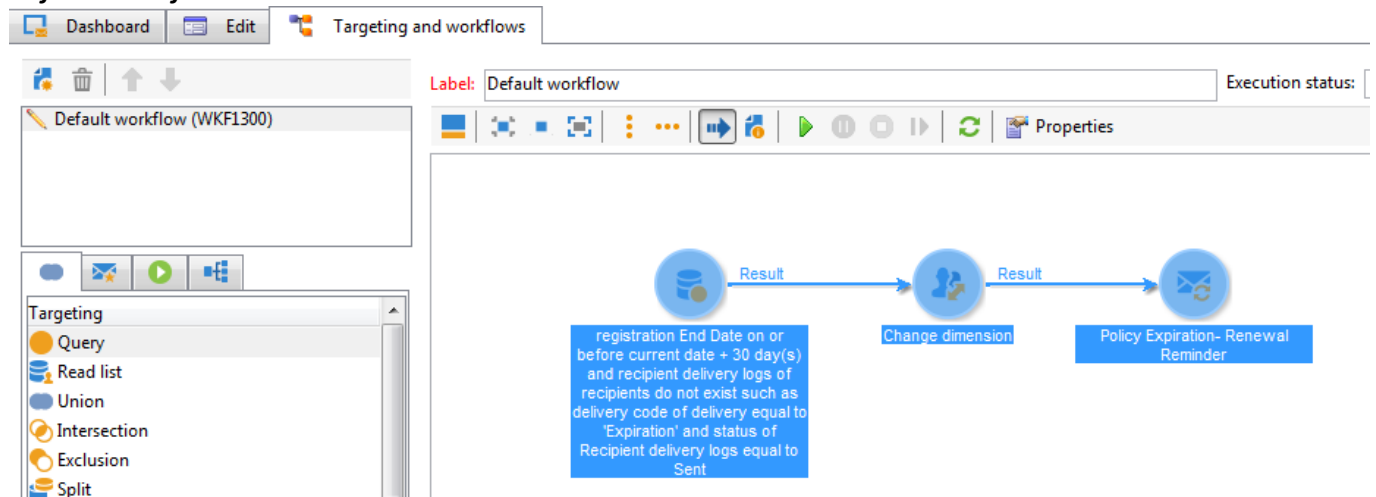


Policy Renewal

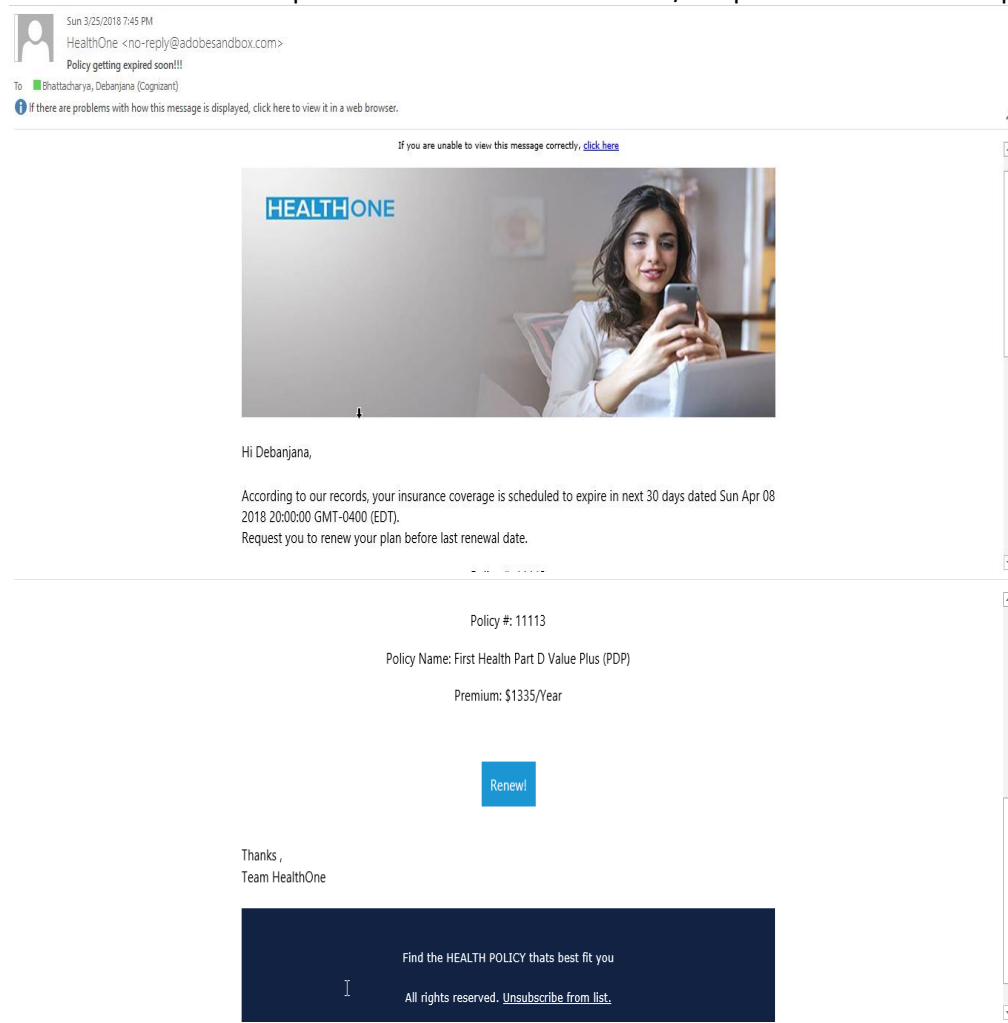
Below is the workflow, which needs to be triggered manually to start the policy renewal campaign journey.

Path to trigger the workflow:

283Sandbox -> Plan -> Program -> Open the "Expiration Email" -> Navigate to "Targeting and Workflows" -> Default Workflow



- User receives a personalized email alert that his/her purchased Healthcare policy is about to expire
- User receives a personalized email alert that his/her purchased Healthcare policy is about to expire



- User clicks on the “Renewal” link in the email
- User is taken to the HealthOne portal Renewal page

HEALTHONE RETAIL PRIVATE CORPORATE INTERNATIONAL Q LOGIN

Our products and services
You And Your Family Needs
Discover LIFE ONE
Explore Our Popular Plans
Become A Lifelong Member
Branches And Outlets
Our Leaders And History
Contact us

Renew Health Insurance

Personal Information

*Required fields

First Name *
Debanjana

Last Name
Bhattacharya

Email *
debanjana.bhattacharya@cognizant.com

Bank*
City Bank

Policy Details

Policy Number: 11113
Policy Name: First Health Part D Value Plus (PDP)
Premium: \$1335/Year

-
-

HEALTHONE RETAIL PRIVATE CORPORATE INTERNATIONAL Q LOGIN

Premium: \$1335/Year

Gender Date of Birth Tobacco Use

Spouse M | No

Child one | No

Child two | No

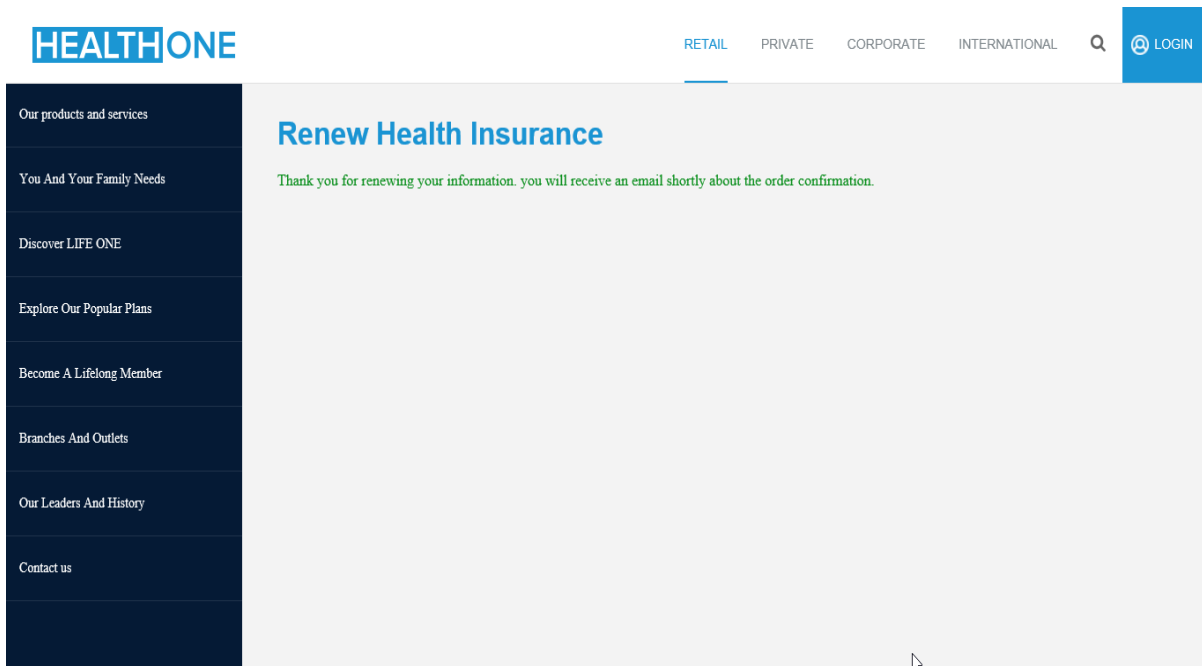
Clear Renew

Learn More About Virtual Visits > Simpler Ways to Manage Prescription > Donate and Support Others in Need > Locate Us >

Our journey Retail
Our Annual reports Private

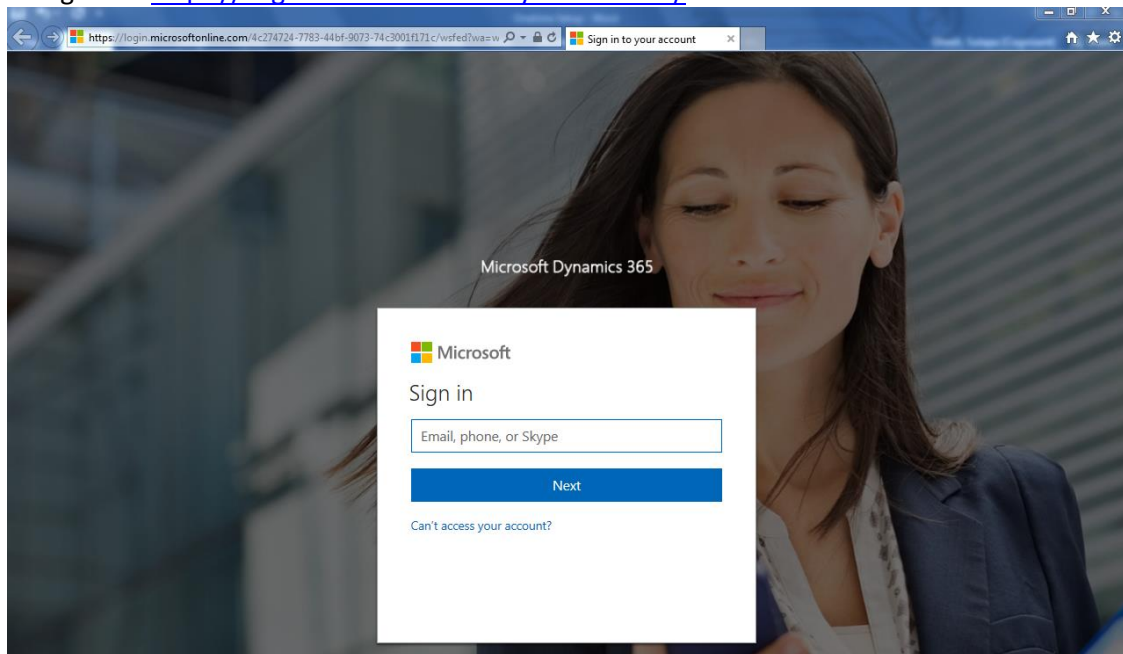
-

- User inputs required details and submits
- User is taken to a page with thanks him/her for policy renewal and informs that he/she will receive an email shortly confirming renewal of the policy

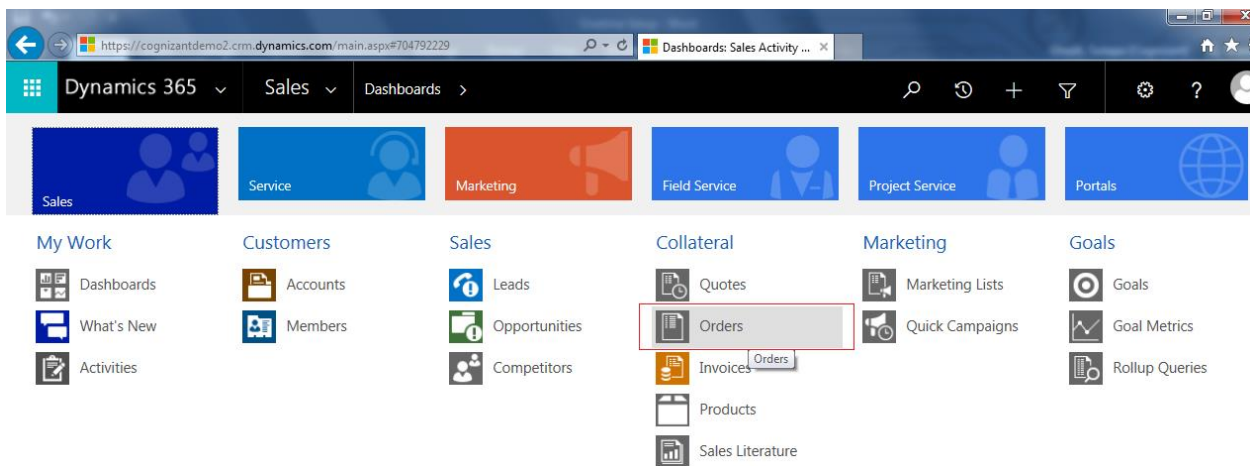


Below is the MSD setup for the above operation to view the details:

1. Navigate to <https://cognizantdemo2.crm.dynamics.com/>



2. Use the credentials:
Login: adobe@cognizantdemo2.onmicrosoft.com
Password: test@1234
3. Navigate to **Sales → Orders**



4. The orders that are created in Adobe would be displayed in the below screen of D365-

Order Number	Policy Name	Policy Number	Customer	Email (Customer)	Policy Premium
ORD-01109-V9G4D6	Health Standard Plan (...)	11125	Rajneesh	rajneesh.kumar6@cognizant.co...	\$649.00
ORD-01108-T3G7G0	Health Standard Plan (...)	11125	Rajneesh	rajneesh.kumar6@cognizant.co...	\$649.00
ORD-01107-X5B0M4	Health Premier Plan (...)	11111	Adam Addis	adamaddis85@gmail.com	\$1,239.00
ORD-01106-B5Q3X8	Health First One Platin...	11115	Kumar Ankur	kumar.ankur@cognizant.com	\$1,499.00
ORD-01105-N1N7X7	Health Premier Plan (...)	11111	testdata1 restdata1	kumar.ankur@cognizant.com	\$1,239.00
ORD-01104-X3G8C1	Health First One Platin...	11115	Adam Addis	adamaddis85@gmail.com	\$1,499.00
ORD-01103-P0D3J0	First Health Part D Val...	11113	kr1 an1	kumar.ankur@cognizant.com	\$1,335.00
ORD-01102-N4D7C5	First Health Part D Val...	11113	kr An	kumar.ankur@cognizant.com	\$1,335.00
ORD-01101-Q3D6H6	Health Premier Plan (...)	11111	Adam Addis	adamaddis85@gmail.com	\$1,239.00
ORD-01100-T2D7R5	Health Premier Plan (...)	11111	Kum89 Ank89	kumar.ankur@cognizant.com	\$1,239.00
ORD-01099-V8F9Y0	Health Premier Plan (...)	11111	Kum89 Ank89	kumar.ankur@cognizant.com	\$1,239.00
ORD-01098-J5Y4K1	Health FirstOne Total...	11123	Swayam Rath	swayam.rath@cognizant.com	\$489.00
ORD-01097-P1V7S7	Health Rx Select (PDP)	11119	Swayam Rath	swayam.rath@cognizant.com	\$449.00
ORD-01096-Q8K0X6	First Health Part D Val...	11113	kumar Ankur2	kumar.ankur@cognizant.com	\$1,335.00
ORD-01095-K1D1K0	Health Silver Plan (Re...	11117	Adam Addis	adamaddis85@gmail.com	\$499.00

The list displays the below fields –

- Order Number – The unique Order no that is generated when the order record is created in CRM. This is sent to the email that is triggered from CRM when order is created.
- Policy Name – Policy Name corresponding to the Order, which is obtained from Adobe through service.
- Policy Number - Policy Number corresponding to the Order, which is obtained from Adobe through service.
- Customer – Customer/Member Lookup field who is associated with the order.
- Email – Email address of the Customer who is associated with the order.

- f. Policy Premium – The Policy Premium amount associated with the Order, which is obtained from Adobe through service.
- g. Bank Name - The Name of the Bank associated with the Order, which is obtained from Adobe through service.
- h. Created On – The date on which the order is created in CRM.

The list is sorted in descending order of “Created On” field – the recent most order is at the top.

5. The Order details can be viewed by clicking on the “Policy Name” hyperlink of an Order record.

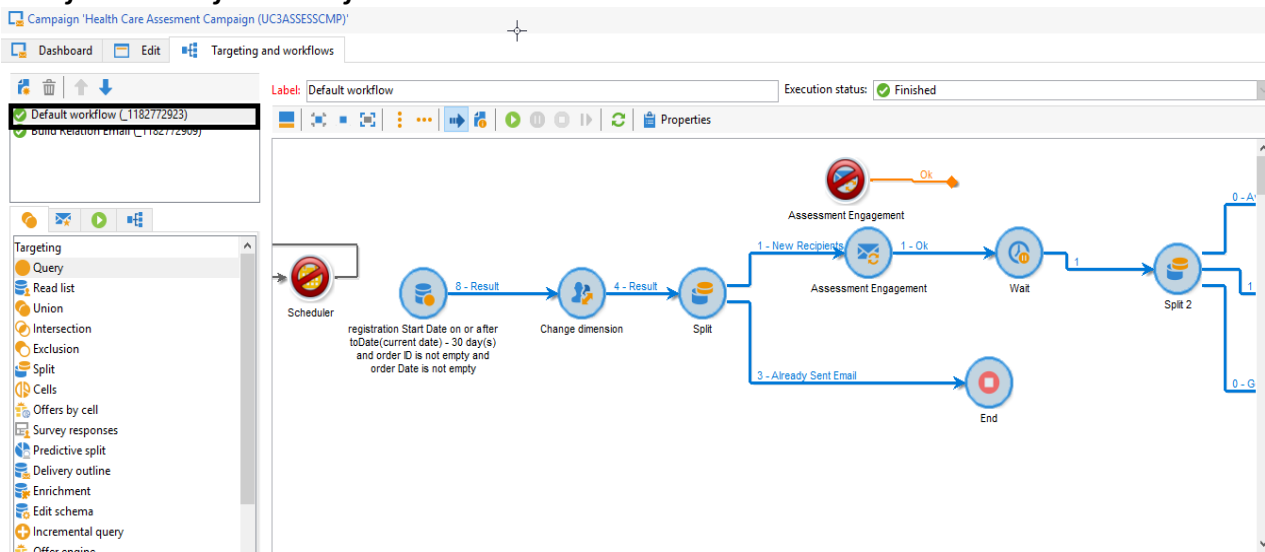
The screenshot displays the Dynamics 365 interface for a 'Purchase Order: Health Premier Plan (HMO)'. The top navigation bar shows 'Dynamics 365' and 'Sales'. The main header includes 'ORDERS > Health Premier Plan...'. Below the header, there's a 'PURCHASEORDER : ORDER' section with 'Status: Active' and 'Owner: Meet Bhalodia'. The 'ORDER DETAILS' section is divided into three panels:

- ORDER INFORMATION:**
 - *Order Number: ORD-01107-X580M4
 - Policy Number: 11111
 - *Policy Name: Health Premier Plan (HMO)
 - Policy Premium: \$1,239.00
 - Bank Name: City-Bank
- SOCIAL PANE:**
 - ACTIVITIES:** Shows a list of activities, including 'Adam Addis; Life One;... Health Care Plan Purchase Order Created CRM:0005108' with a timestamp 'Hi Adam Addis, Greetings from Life O... Yesterday'.
 - NOTES:** (Empty)
- MEMBER DETAILS:**
 - *Name: Adam Addis
 - Email: adamaddis85@gmail.com
 - Mobile Phone: 0984 767 3221
 - Age: 30

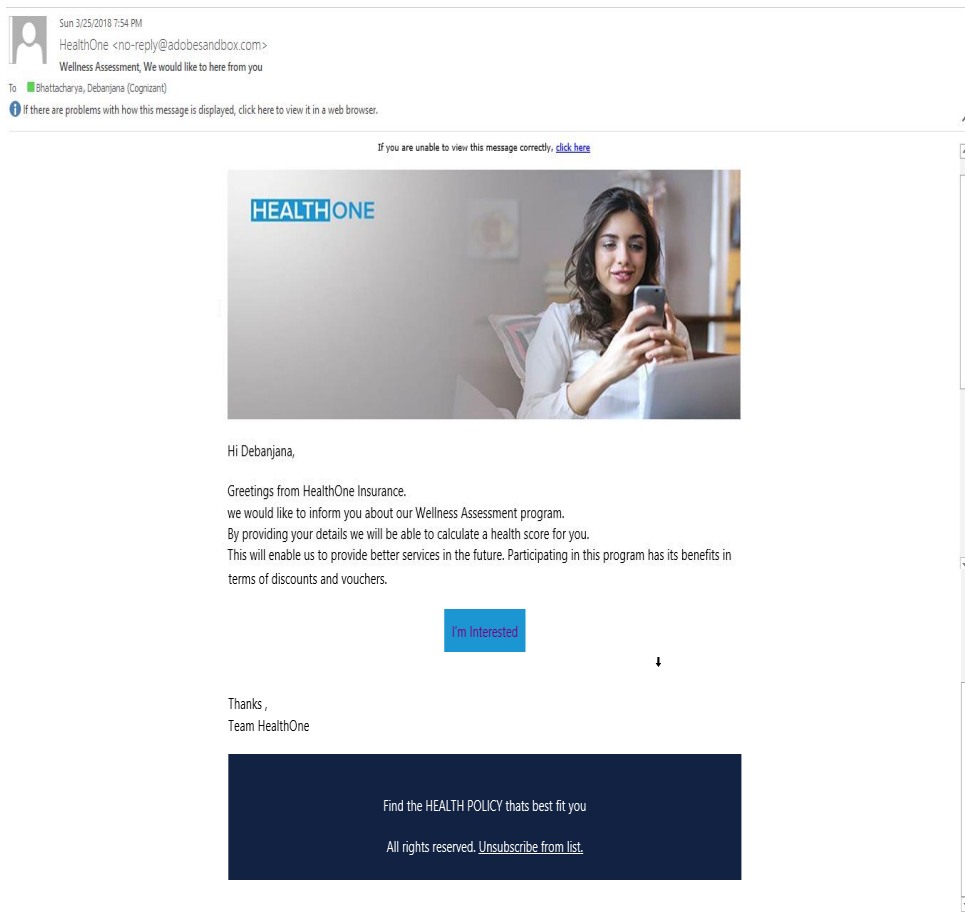
Wellness Assessment

Below is the workflow, which needs to be triggered manually to start the Healthcare Assessment campaign journey. Path to trigger the workflow:

283Sandbox -> Plan -> Program -> Open the “Health Care Assessment Campaign” -> Navigate to “Targeting and Workflows” -> Default Workflow

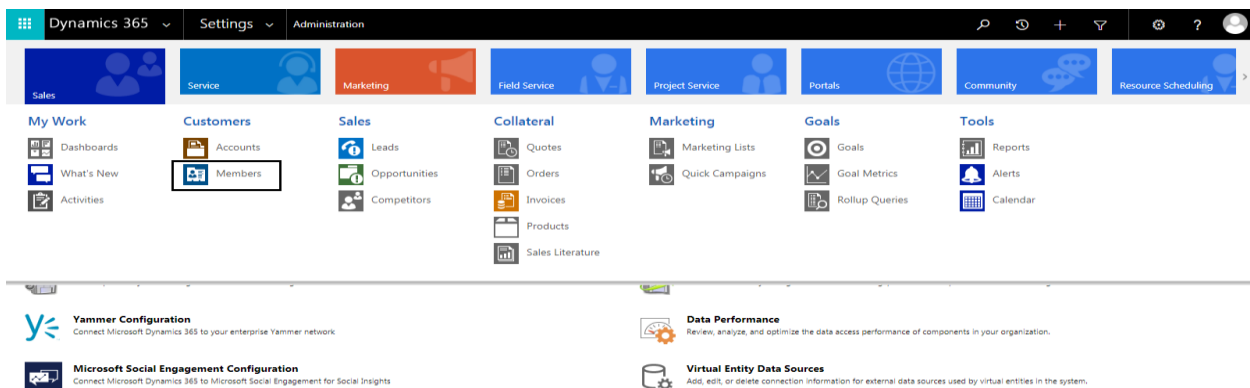


- User receives a personalized email on wellness assessment with details of the assessment program from HealthOne
- from HealthOne






Below is the MSD setup for the above operations details

1. Login to CRM and navigate to Members entity.



2. User is taken to the HealthOne portal for healthcare assessment
- 3.



 WELLNESS ASSESSMENTRETAILPRIVATECORPORATEINTERNATIONALSign In

Home > Wellness Assessment

Wellness Assessment

Wellness Assessment Questions

Member Name

—

In general, would you say your health is?

In the past year have you had:

In the past 7 days, how much pain have you felt?

4.

In last week do you had problems with constipation

12345

In last week do you had problems with constipation

☒ No ☐ Yes

In general, how satisfied are you with your life?

In a typical week, how much alcohol do you drink?

How is the condition of your mouth and teeth ?

Does your home have rugs in the hallway?

☒ No ☐ Yes

Does your home have handrails on the stairs?

☒ No ☐ Yes

5.

Does your home have grab bars in the bathroom?

☒ No ☐ Yes

Does your home have good lighting?

☒ No ☐ Yes

6.

Do you need other's help to perform daily activiti

☒ No ☐ Yes

Do you need other's help to perform daily activities?

☒ No ☐ Yes

Do you know how to use a first aid kit?

☒ No ☐ Yes

Do you have any problems with your hearing?

☒ No ☐ Yes

Do you exercise 30 mins in week?

☒ No ☐ Yes

Do you ever have 5 or more alcoholic drinks at once?

☒ No ☐ Yes

Do you eat healthy food and avoid fatty food?

☒ No ☐ Yes

Do anyone have concern about your money?

☒ No ☐ Yes

Any problems in staying or falling asleep?


☒ No ☐ Yes

Do you always fasten your seat belt while driving?

☒ No ☐ Yes

Submit

7. Navigate to ADAM ADIS record and Assessment score will be visible on the form.



MEMBER : CONTACT ▾
Adam Addis ▾

Owner

SYSTEM

MEMBER INFORMATION

Full Name	Adam Addis	Effective Date	10/1/2017	Physical Address	501 Oak Street Johnson Obea
Gender	Male	Termination Date	10/31/2018	Mailing Address	501 Oak Street Johnson Obea
Birthday	2/14/1985	Renewal Due Date	10/31/2018	Home Phone	2300215435
SSIN	2250213520	Assessment Due Date	3/31/2018	Mobile Phone	9847673221
Marital Status	Married	HRA Score	Low	Email	adamaddis85@gmail.com

PLAN INFORMATION

PCP Name	Dr. Kim Yates	Case Manager Name	Dan Weber
PCP Effective Date	10/31/2017	Case Manager Phone	7896453321
PCP Phone	8552154755	Case Manager Extn	2364

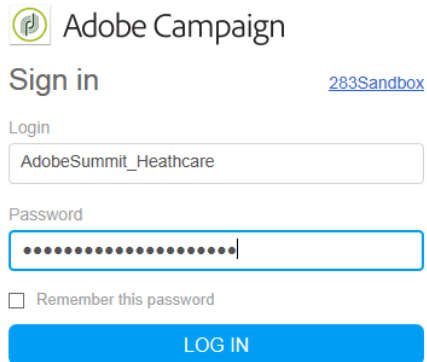
HEALTH RISK ASSESSMENTS

Title	In general, would you say your health is?	Created On
Healthcare Risk Assessment	Excellent	3/21/2018 11:25 ...
Healthcare Risk Assessment	Good	3/22/2018 1:24 P...

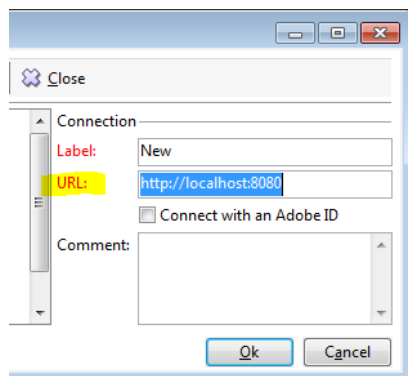
Technical Flow

Opening ACM

1. Open Adobe Campaign from the Main menu.
2. Once the login page opens, click on the top right corner.



3. In the URL field enter: <https://ac283eu.adobesandbox.com> . You can provide a meaningful name in the 'Label' field too. Click Ok

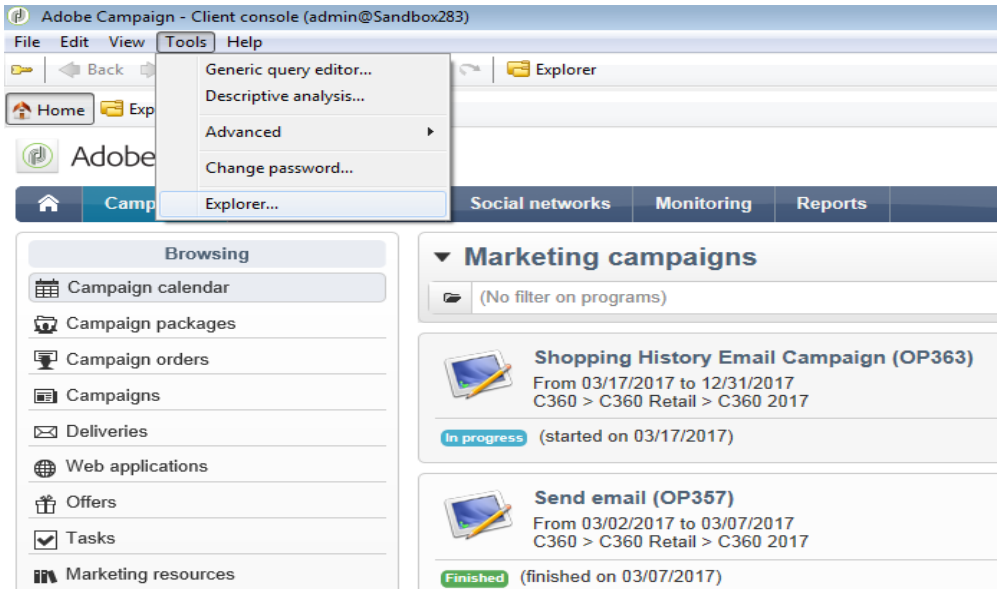


4. In the login page use the credentials :
Login: AdobeSummit_Heathcare
Password: AdobeSummit_Heathcare

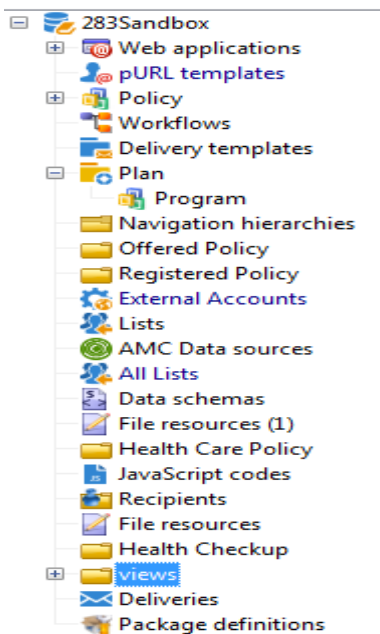
You should be able to login into Adobe Campaign.

Navigating to the Explorer View

- After a successful login, user has to go to the Explorer view.
- Click on the Tools available in menu bar and choose 'Explorer...' from the drop down.



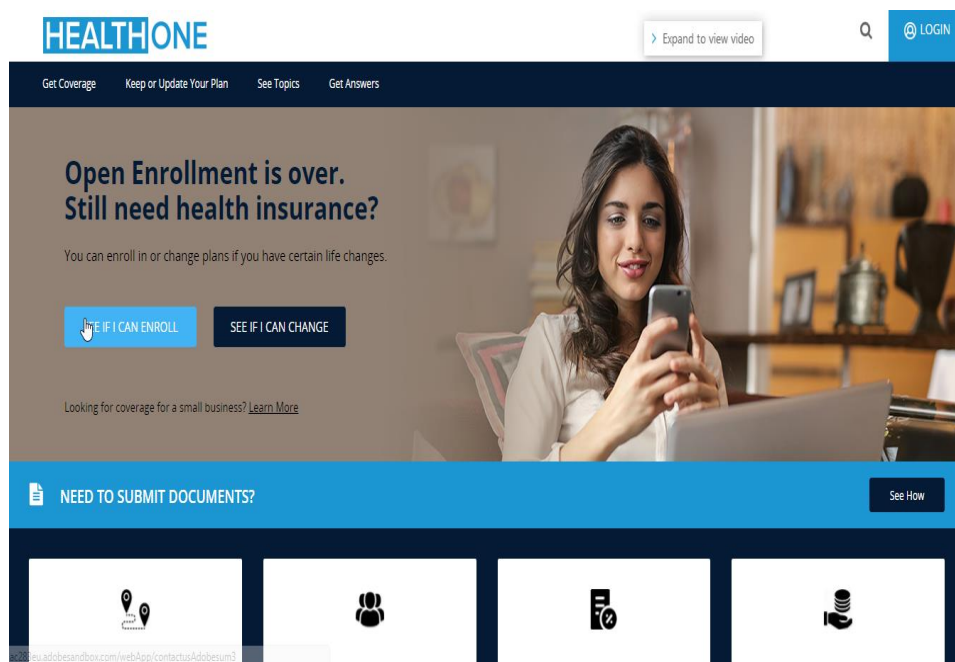
In explorer the associated folder structure will look as below,



On-boarding New Healthcare Payers with relevant plans using Machine Learning

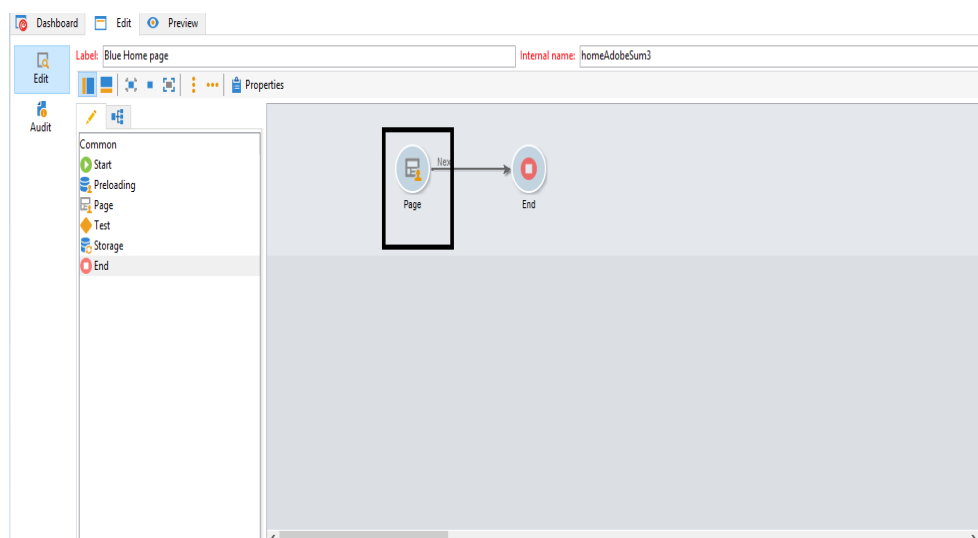
Adobe Campaign

- User visits the Healthcare insurance home page and shows interest in new enrolment and clicks on “SEE IF I CAN ENROLL”



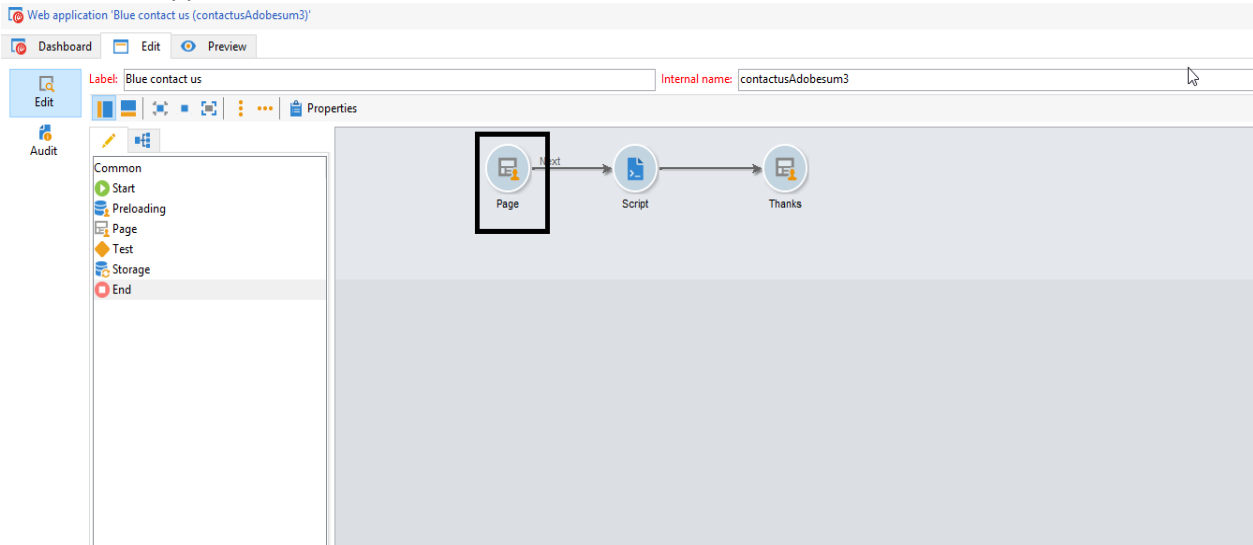
On click of the button of the home page, user navigates to below landing page to enter the basic details

- Requester expressed interest from the home page by clicking on the button “SEE IF I CAN ENROLL”
- Adobe Website URL: <http://ac283eu.adobesandbox.com/webApp/homeAdobeSum3?id=0>



- Requester navigates to interest form and by submitting the basic details for a healthcare plan.

WebApp: Blue contact us



- Form details of user age, email, mobile, Country, State, salary & Current Premium is analyzed by Microsoft ML, which then classifies them as high, med, low relevance score & pushes it into Adobe Campaign.
 - ✓ Same WebApp(Red contact us) – JS module to call Microsoft ML and get the response , which will have relevance score
- Once recived the details, above JS will insert a record in the recipient table(nkr:recipient) along with relevance score. We have extended the recipient table and added a column” Relevance score”

Data schema 'Recipients (nkr)'

Name:

nkr:recipient

Label:

Recipients

Label (singular):

Recipient

Description:

Recipient table (profiles

Table content

email contains 'rajneesh' and risk Factor is not empty

Primary key	Recipients	Email	Risk Factor	Age	Yearly Income	State/Province code
1,189,337,703	Kumar Rajneesh (rajn...	rajneesh.kumar6@cognizant.com	Medium	17	200,000.00	TX

- Master data of the policy details are stored in the table (nkr:healthcarePolicy).

Name:

nkr:healthcarePolicy

Label (singular):

Health Care Policy

Label:

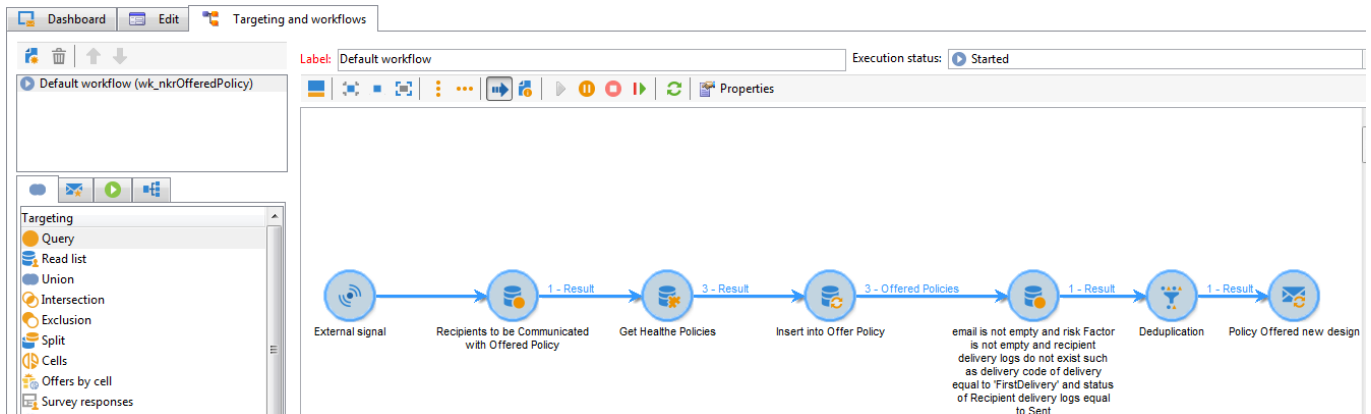
Health Care Policies

Description:

Table content (Health Care Policies)

Area of Interest	Risk Factor	Policy Number	Policy Name	Policy Premium	Policy Details
Health Care	High	11,111	Health Premier Plan (HMO)	1,239.00	HPP - Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	High	11,112	Dental Premier Plan (HMO)	1,101.00	DPP - Covers care you receive through our network of local doctors and hospitals
Health Care	High	11,113	First Health Part D Value Plus (PDP)	1,335.00	FH- Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	High	11,114	First Health Dental Value Plus (PDP)	1,049.00	First Health Dental Value Plus for Health Care & Dental
Health Care	High	11,115	Health First One Platinum Plan(HMO)	1,499.00	FHD - Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	High	11,116	Dental First One Platinum Plan(PDP)	1,089.00	DF - Covers care you receive through our network of local doctors and hospitals
Health Care	Low	11,117	Health Silver Plan (Regional PPO)	499.00	HS- Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	Low	11,118	Dental Silver Plan (Regional PPO)	351.00	DS - Covers care you receive through our network of local doctors and hospitals
Health Care	Low	11,119	Health Rx Select (PDP)	449.00	HR - Covers care you receive through our network of local doctors and hospitals
Health Care	Low	11,120	Health Basic Plan (HMO)	349.00	HB - Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	Low	11,121	Dental Rx Select (PDP)	319.00	DRS - Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	Low	11,122	Dental Basic Plan (HMO)	301.00	DB - Covers care you receive through our network of local doctors and hospitals
Health Care	Low	11,123	Health FirstOne Total Care(HMO)	489.00	FirstOne - Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	Low	11,124	Dental FirstOne Total Care(PPO)	399.00	DFT - Covers care you receive through our network of local doctors and hospitals
Health Care	Medium	11,125	Health Standard Plan (PPO)	649.00	HSP - Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	Medium	11,126	Dental Standard Plan (PPO)	505.00	DSP - Covers care you receive through our network of local doctors and hospitals
Health Care	Medium	11,127	Health Rx Saver (PDP)	669.00	HRS- Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	Medium	11,128	Dental Rx Saver (PDP)	519.00	DRX- Covers care you receive through our network of local doctors and hospitals
Health Care	Medium	11,129	Health FirstOne Gold Plan(HMO)	719.00	Health Gold - Covers care you receive through our network of local doctors and hospitals
Health Care & Dental	Medium	11,130	Dental FirstOne Gold Plan(PDP)	602.00	Dental Gold - Covers care you receive through our network of local doctors and hospitals

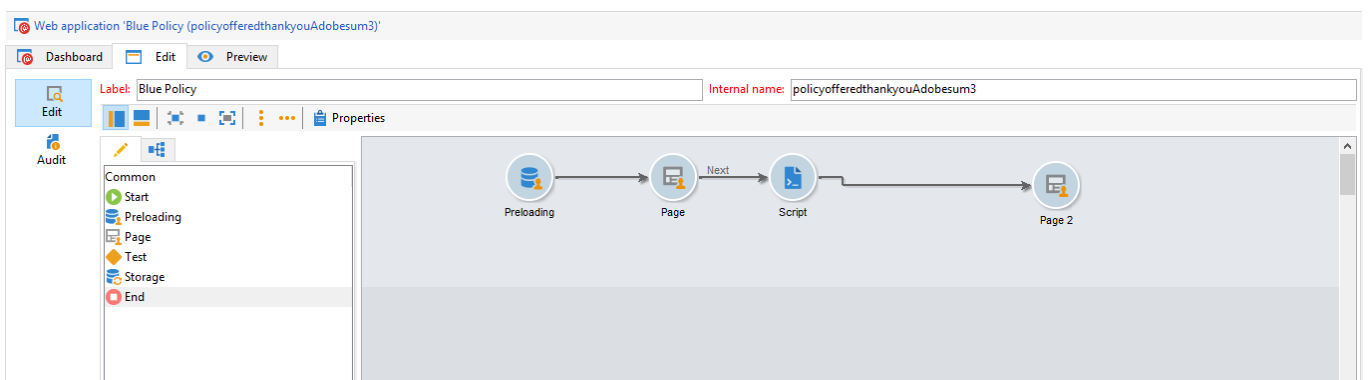
- Adobe Campaign creates journeys for users, with contextual emails, relevant policies based on Azure inputs and area of interest.
- Through below workflow, list of policies for which customer is eligible get pulled from nkr:healthcarePolicy and will get inserted to the table nkr:offpolicy. Finally the same list will get emailed to customer.



- Customer views email with details of the plan, registers for it online & does the payment. Once clicked on Submit through webapp, JS will send the customer and policy details to CRM. CRM will process the record and will send back the order confirmation id.

WebApp: Blue policy

- Subscription details are captured by MS Dynamics where new order is created & details shared back with Adobe Campaign



- Through above JS, Customer-Policy-Order mapping gets stored in the table nkr:regpolicy.

Data schema 'Registered Policies (nkr)'

Name: nkr:regpolicy Label: Registered Policies

Label (singular): Registered Policy Description: This stores the registered policy information

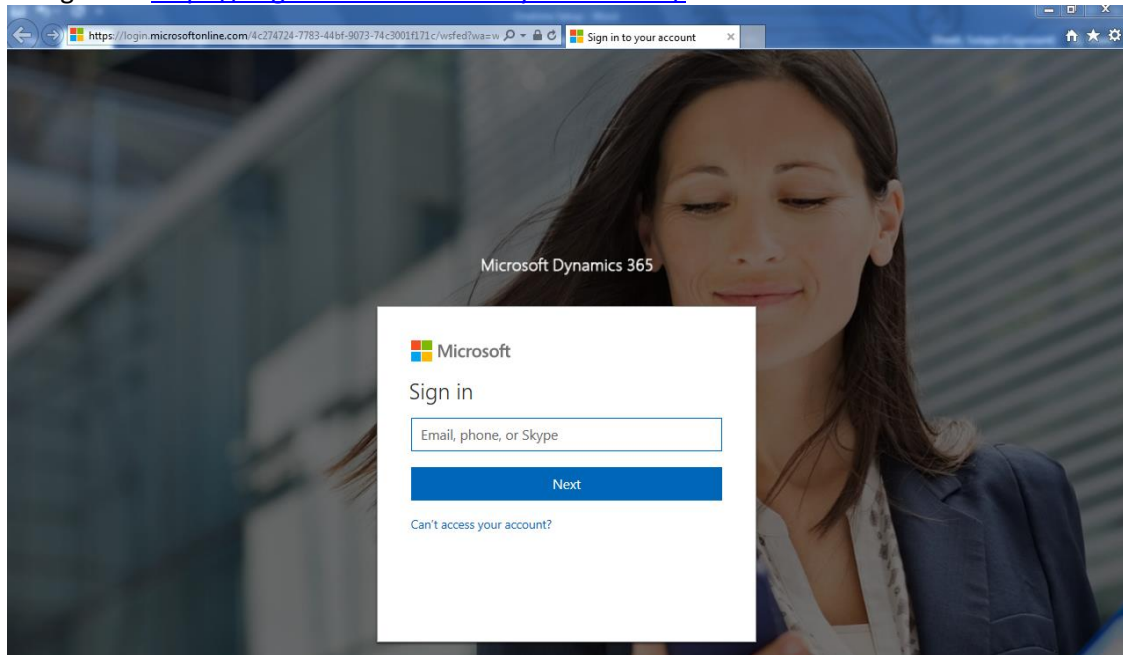
Table content

Recipient ID	Beneficiary Email	Order Date	Order ID	Payment Bank	Policy Name	Policy Premium	Registration Start Date	Registration End Date	Status
1,189,337,703	rajneesh.kumar6@cogn...	03/22/2018 2:11:42 AM	ORD-01108-T3G7G0	US Bank	Health Standard Plan (P...	649.00	03/22/2018	04/06/2018	Expired
1,189,337,703	rajneesh.kumar6@cogn...	03/22/2018 3:19:19 AM	ORD-01109-Y9G4D6	US Bank	Health Standard Plan (P...	649.00	03/22/2018	04/06/2018	Active

- Users receive confirmation email along with details of subscribed plan from MS Dynamics. Same order id should be there in the “nkr:regpolicy” policy.

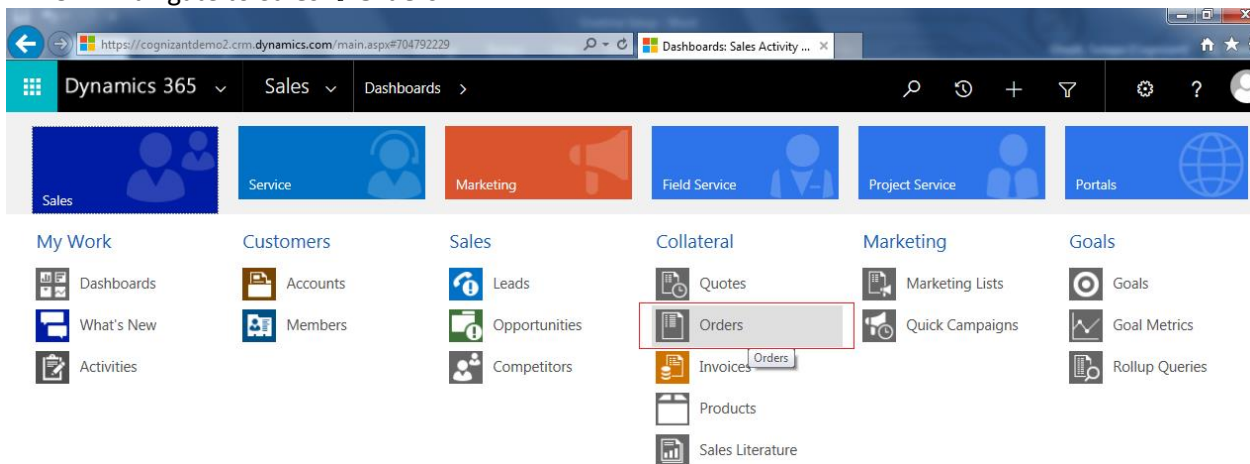
MS Dynamics

6. Navigate to <https://cognizantdemo2.crm.dynamics.com/>



7. Use the credentials:
Login: adobe@cognizantdemo2.onmicrosoft.com
Password: test@1234

8. Navigate to **Sales** → **Orders**



9. The orders that are created in Adobe would be displayed in the below screen of D365-

Order Number	Policy Name	Policy Number	Customer	Email (Customer)	Policy Premium
ORD-01109-V9G4D6	Health Standard Plan (...)	11125	Rajneesh	rajneesh.kumar6@cognizant.co...	\$649.00
ORD-01108-T3G7G0	Health Standard Plan (...)	11125	Rajneesh	rajneesh.kumar6@cognizant.co...	\$649.00
ORD-01107-X5B0M4	Health Premier Plan (...)	11111	Adam Addis	adamaddis85@gmail.com	\$1,239.00
ORD-01106-B5Q3X8	Health First One Platin...	11115	Kumar Ankur	kumar.ankur@cognizant.com	\$1,499.00
ORD-01105-N1N7X7	Health Premier Plan (...)	11111	testdata1 restdata1	kumar.ankur@cognizant.com	\$1,239.00
ORD-01104-X3G8C1	Health First One Platin...	11115	Adam Addis	adamaddis85@gmail.com	\$1,499.00
ORD-01103-P0D3J0	First Health Part D Val...	11113	kr1 an1	kumar.ankur@cognizant.com	\$1,335.00
ORD-01102-N4D7C5	First Health Part D Val...	11113	kr An	kumar.ankur@cognizant.com	\$1,335.00
ORD-01101-Q3D6H6	Health Premier Plan (...)	11111	Adam Addis	adamaddis85@gmail.com	\$1,239.00
ORD-01100-T2D7R5	Health Premier Plan (...)	11111	Kum89 Ank89	kumar.ankur@cognizant.com	\$1,239.00
ORD-01099-V8F9Y0	Health Premier Plan (...)	11111	Kum89 Ank89	kumar.ankur@cognizant.com	\$1,239.00
ORD-01098-J5Y4K1	Health FirstOne Total...	11123	Swayam Rath	swayam.rath@cognizant.com	\$489.00
ORD-01097-P1V7S7	Health Rx Select (PDP)	11119	Swayam Rath	swayam.rath@cognizant.com	\$449.00
ORD-01096-Q8K0X6	First Health Part D Val...	11113	kumar Ankur2	kumar.ankur@cognizant.com	\$1,335.00
ORD-01095-K1D1K0	Health Silver Plan (Re...	11117	Adam Addis	adamaddis85@gmail.com	\$499.00

The list displays the below fields –

- Order Number – The unique Order no that is generated when the order record is created in CRM. This is sent to the email that is triggered from CRM when order is created.
- Policy Name – Policy Name corresponding to the Order, which is obtained from Adobe through service.
- Policy Number - Policy Number corresponding to the Order, which is obtained from Adobe through service.
- Customer – Customer/Member Lookup field who is associated with the order.
- Email – Email address of the Customer who is associated with the order.
- Policy Premium – The Policy Premium amount associated with the Order, which is obtained from Adobe through service.
- Bank Name - The Name of the Bank associated with the Order, which is obtained from Adobe through service.
- Created On – The date on which the order is created in CRM.

The list is sorted in descending order of “Created On” field – the recent most order is at the top.

- The Order details can be viewed by clicking on the “Policy Name” hyperlink of an Order record.

PURCHASEORDER : ORDER
Health Premier Plan (HMO)

Status: Active | Owner: Meet Bhalodia

ORDER DETAILS

ORDER INFORMATION		SOCIAL PANE		MEMBER DETAILS	
*Order Number	ORD-01107-XS80M4	ACTIVITIES All Add Phone Call Adam Addis; Life One;... Health Care Plan Purchase Order Created CRM:0005108 Hi Adam Addis, Greetings from Life O... Yesterday		*Name	Adam Addis
Policy Number	11111			Email	adamaddis85@gmail.com
*Policy Name	Health Premier Plan (HMO)			Mobile Phone	0984 767 3221
Policy Premium	\$1,239.00			Age	30
Bank Name	City-Bank				

The Order Details form consists of 3 sections-

- Order Information – The order details that are obtained from Adobe though service.
- Social Pane – The mail that was sent to the associated member when the order was created in CRM.
- Member Details – Member basic info, who is associated with the order.

11. The Member details can be viewed by clicking on the “Customer” hyperlink of an Order record as below-

MEMBER : CONTACT
Adam Addis

Owner: SYSTEM

MEMBER INFORMATION

*Full Name	Adam Addis	Effective Date	10/1/2017	Physical Address	501 Oak Street Johnson
Gender	Male	Termination Date	10/31/2018	Mailing Address	501 Oak Street Johnson
Birthday	2/14/1985	Renewal Due Date	10/31/2018	Home Phone	2300215435
SSIN	2250213520	Assessment Due Date	3/31/2018	Mobile Phone	9847673221
Marital Status	Married	HRA Score	Low	Email	adamaddis85@gmail.com

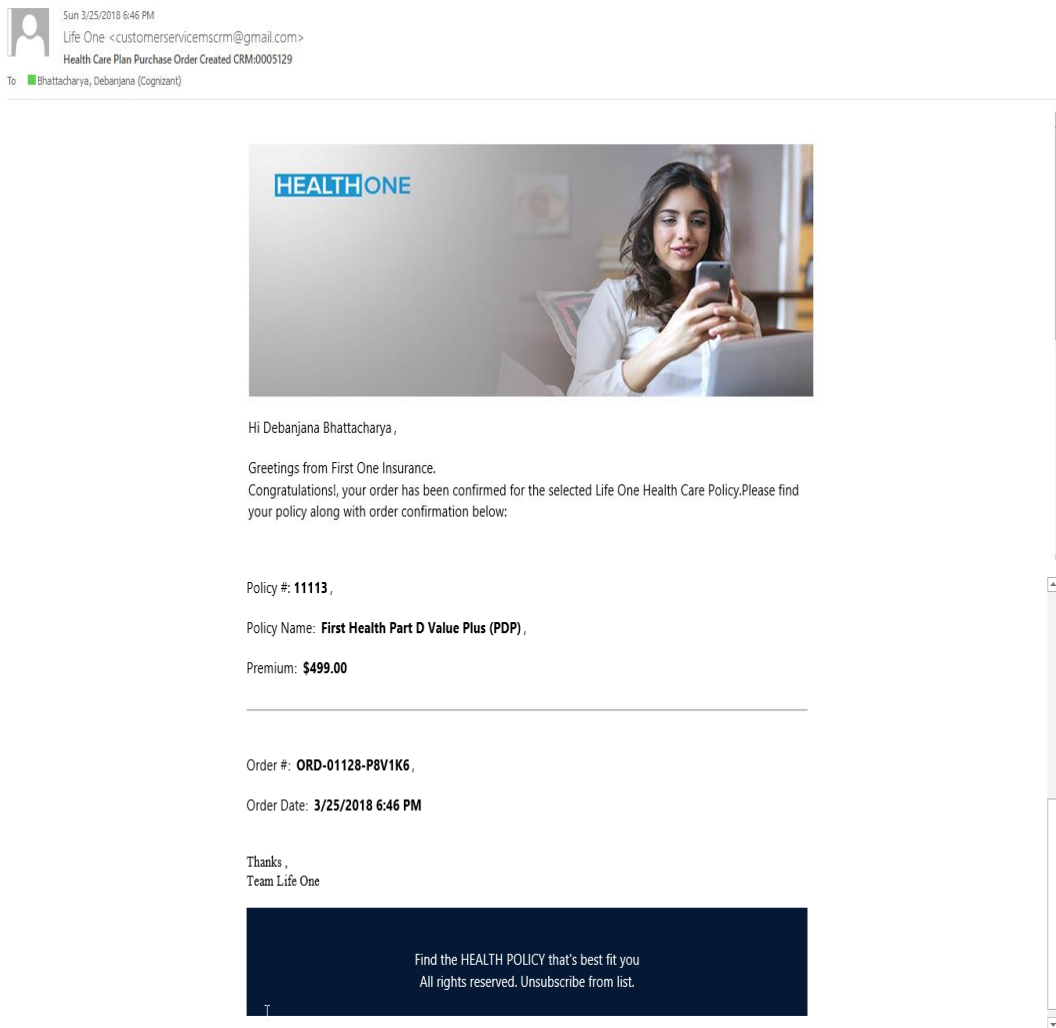
PLAN INFORMATION

PCP Name	Dr. Kim Yates	Case Manager Name	Dan Weber
PCP Effective Date	10/31/2017	Case Manager Phone	7896453321
PCP Phone	8552154755	Case Manager Extn	2364

HEALTH RISK ASSESSMENTS

Title	In general, would you say your health is?	Created On
Healthcare Risk Assessment	Excellent	2/23/2018 11:35

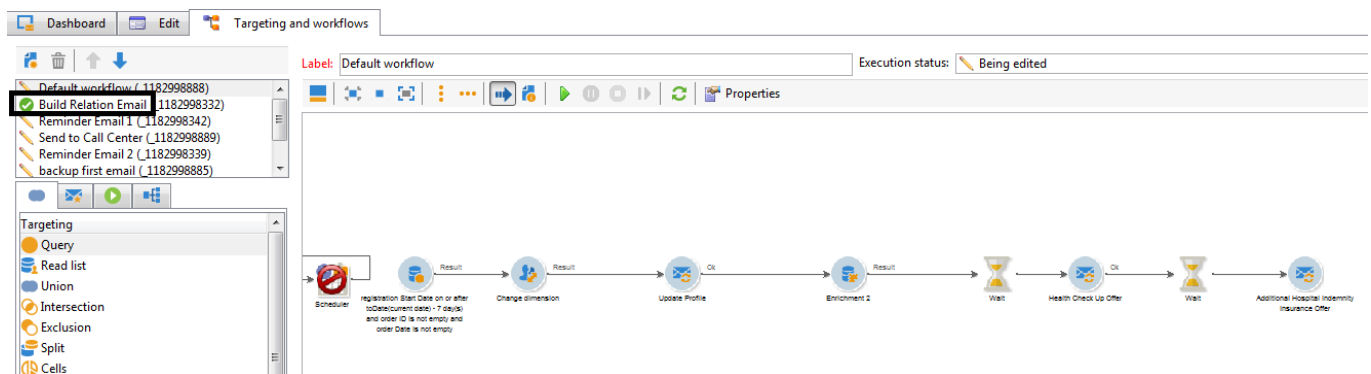
12. In D365, there is a workflow which is configured to trigger an email to the associated member when an order is created or renewed. The email template is as below –



Engaging New Healthcare Payers through consistent and relevant journeys

Adobe Campaign

- Marketer has set up campaign to target users who enrolled for a new plan to engage them using relevant content



Part 1:

- Users receives Welcome email with directions to log into the Payer website online and complete their profile details online. In the above workflow, update profile delivery template has been used to trigger the email for the same. There is a link, on click of which, user will be navigated to a webapp to update the profile. Once clicked on submit, updated details get stored in recipient table.

Webapp : Blue Profile (Internal Name = profileUpdateAdobeSum3)

- User visits the profile page and fills up their address details, etc. online
Same Webapp is used for the same.

Part 2:

- A month later the user receives an offer email based on their state, with discount for health checkup at nearby clinic.
In the above workflow, attached "Health Check up Offer" delivery template has been used to perform the action and the send the email. Here, we are pulling the details based on state of the customer from the table "nkr:healthCheckUp".

Part 3:

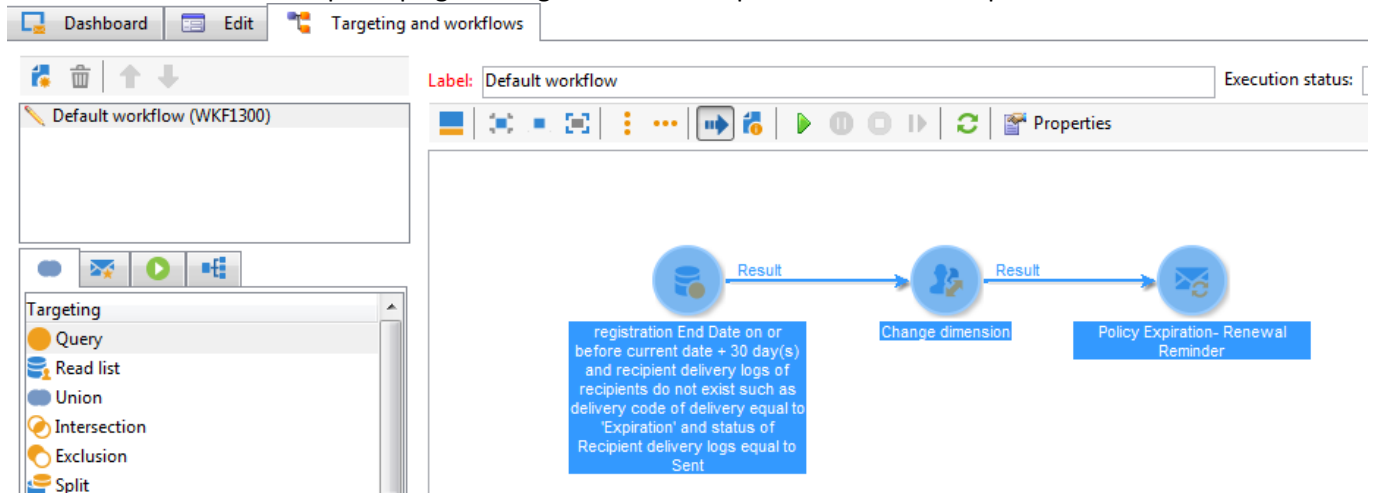
- After a month, user receives further information email around their plan. Last delivery template use to perform the action.

There is a wait module, between on the deliveries, to delay the email trigger with respective time. We can schedule it as per our convenience.

Reminding Healthcare Payers about policy expiration and Renewal

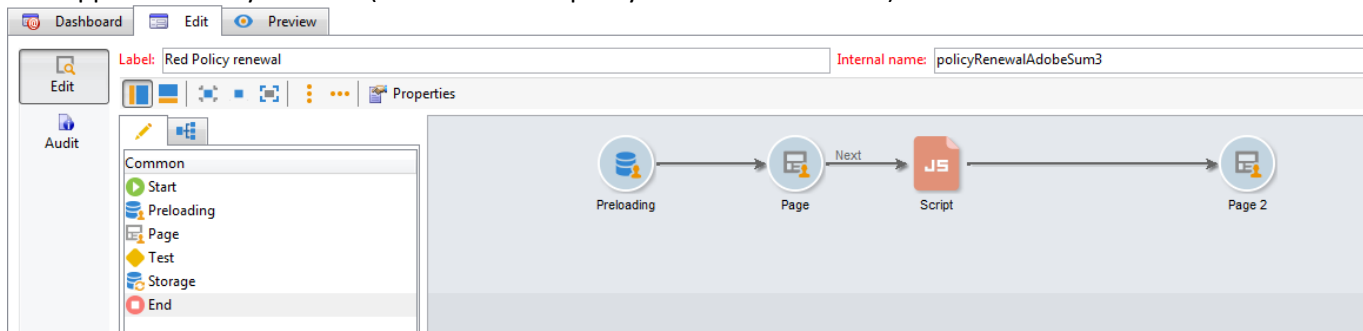
Adobe Campaign

- Marketer has set up campaign to target users whose plans are about to expire



- Users receive email alert with plan renewal option and renewal due date.
- User clicks link in email, visits the landing page and renews the plan

Webapp : Blue Policy renewal (Internal Name : policyRenewalAdobeSum3)



- Renewal details are shared to MS Dynamics and order is re-generated & details are also shared to ACM. This action gets performed through the above JS. Once adobe received the renewal confirmation, adobe insert one more record to nkr:regpolicy table and updates the status of the new record as "Active" and previous record as "Expired". Refer to the last column of the below screenshot.

Data schema 'Registered Policies (nkr)'

Name:

nkr:regpolicy

Label:

Registered Policies

Label (singular):

Registered Policy

Description:

This stores the registered policy information

Table content

Filters

beneficiary Email contains 'rajneesh'

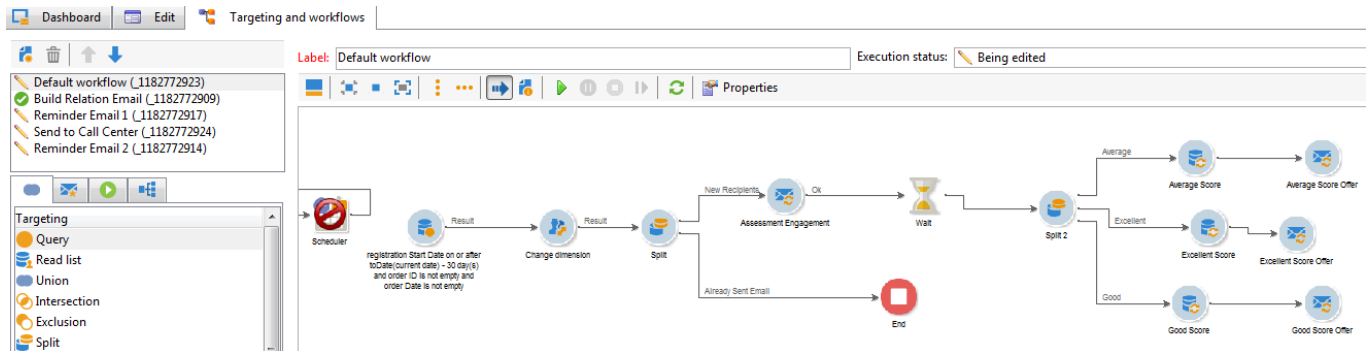
Recipient ID	Beneficiary Email	Order Date	Order ID	Payment Bank	Policy Name	Policy Premium	Registration Start Date	Registration End Date	Status
1,189,337,703	rajneesh.kumar6@cogn...	03/22/2018 2:11:42 AM	ORD-01108-T3G7G0	US Bank	Health Standard Plan (P...	649.00	03/22/2018	04/06/2018	Expired
1,189,337,703	rajneesh.kumar6@cogn...	03/22/2018 3:19:19 AM	ORD-01109-V9G4D6	US Bank	Health Standard Plan (P...	649.00	03/22/2018	04/06/2018	Active

- Users receive confirmation email along with details of renewal plan from MSD

Targeting Healthcare Payers engaging them for Healthcare Assessment

Adobe Campaign

- Marketer has set up campaign to target users for enrolling in a healthcare assessment



- Users receives email with link to healthcare assessment. Landing page has been designed in CRM. ACM has embedded the landing page URL in the email template "Assessment Engagement".
- User clicks link in email, visits the landing page (in Dynamics) and fills in details
- Healthcare details are captured by MS Dynamics a score is calculated (Excellent, Good, Average)
- The score is shared with Adobe Campaign. Storing the score details in the recipient extended column "Health Assessment Score"

Data schema 'Recipients (nkr)'

Name: nkr:recipient Label: Recipients
Label (singular): Recipient Description: Recipient table (profiles)

Table content

email contains 'rajneesh' and risk Factor is not empty

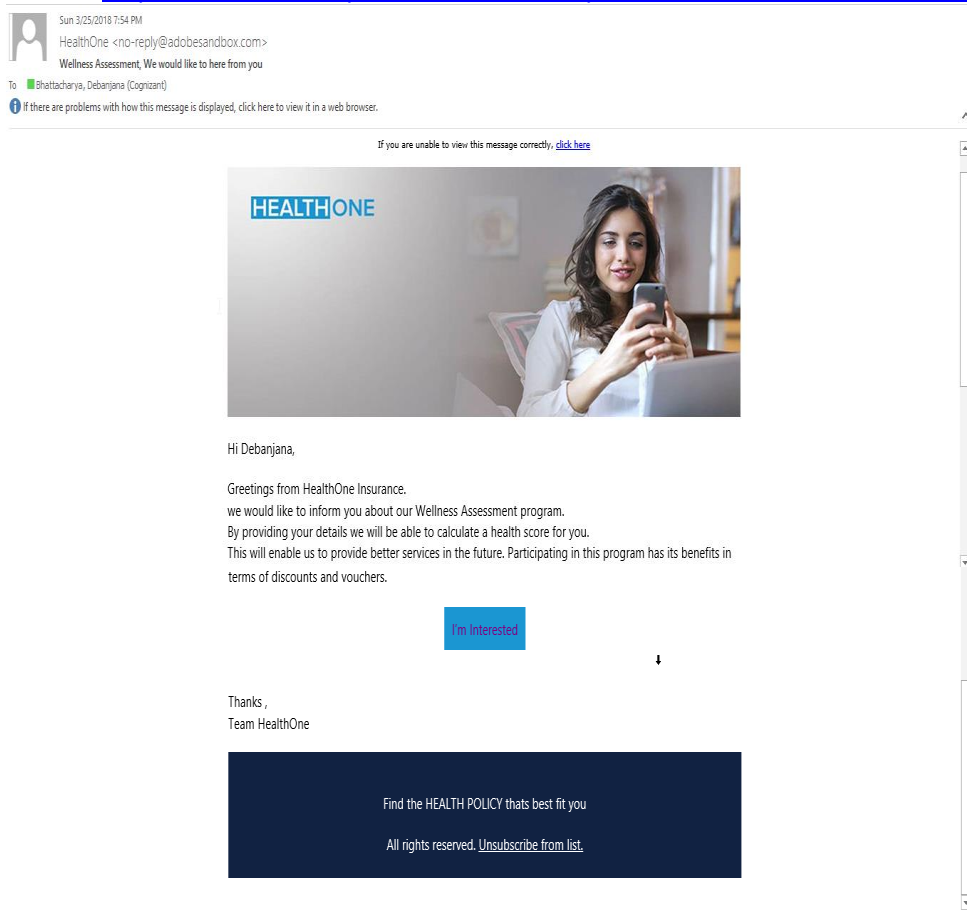
Primary key	Recipients	Email	Risk Factor	Age	Yearly Income	State/Province code	Health Assessment Score
1,189,337,703	Kumar Rajneesh (rajn...	rajneesh.kumar6@cognizant.com	Medium	17	200,000.00	TX	good

- Based on the score Adobe Campaign sends relevant offers to the users. Same has been designed the workflow.

MS Dynamics

5. Click on link given in the email to navigate to health risk assessment portal.

<https://healthcareportal.microsoftcrmportals.com/health-risk-assessment/>



6. Login to health assessment portal as per screenshot given below. Use mentioned credentials.

Username: adamaddis

Password:
cts@123456

The screenshot shows the 'LIFE ONE' Health Risk Assessment portal. The navigation bar includes links for 'HEALTH RISK ASSESSMENT', 'RETAIL', 'PRIVATE', 'CORPORATE', and 'INTERNATIONAL'. Below the navigation bar, there are links for 'Sign In', 'Register', and 'Redeem Invitation'. The main section is divided into two columns: 'Sign in with a local account' and 'Sign in with an external account'. The 'Sign in with a local account' column has fields for '* Username' and '* Password', a 'Remember me?' checkbox, and 'Sign In' and 'Forgot Your Password?' buttons. The 'Sign in with an external account' column has an 'Azure AD' button.

7. Questions will be presented. Fill the proper answers and submit the form as shown.

Home > Health Risk Assessment

Health Risk Assessment

Submission completed successfully.

8. Login to CRM and navigate to Members entity.

The screenshot shows the Microsoft Dynamics 365 user interface. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Administration'. Below this, a horizontal menu lists various functional areas: Sales, Service, Marketing, Field Service, Project Service, Portals, Community, and Resource Scheduling. The 'My Work' section on the left contains 'Dashboards', 'What's New', and 'Activities'. The 'Customers' section is expanded, showing 'Accounts' and 'Members', with 'Members' highlighted by a red box. Other sections include 'Sales' (Leads, Opportunities, Competitors), 'Collateral' (Quotes, Orders, Invoices, Products, Sales Literature), 'Marketing' (Marketing Lists, Quick Campaigns), 'Goals' (Goals, Goal Metrics, Rollup Queries), and 'Tools' (Reports, Alerts, Calendar). At the bottom, there are links for 'Yammer Configuration', 'Microsoft Social Engagement Configuration', 'Data Performance', and 'Virtual Entity Data Sources'.

9. Navigate to ADAM ADIS record and Assessment score will be visible on the form.

The screenshot displays the ADAM ADIS record form for Adam Addis. The form is organized into three main sections: Member Information, Plan Information, and Health Risk Assessments.

MEMBER INFORMATION

* Full Name	Adam Addis	Effective Date	10/1/2017	Physical Address	501 Oak Street Johnson Obar
Gender	Male	Termination Date	10/31/2018	Mailing Address	501 Oak Street Johnson Obar
Birthday	2/14/1985	Renewal Due Date	10/31/2018	Home Phone	2300215435
SSIN	2250213520	Assessment Due Date	3/31/2018	Mobile Phone	9847673221
Marital Status	Married	HRA Score	Low	Email	adamaddis85@gmail.com

PLAN INFORMATION

PCP Name	Dr. Kim Yates	Case Manager Name	Dan Weber
PCP Effective Date	10/31/2017	Case Manager Phone	7896453321
PCP Phone	8552154755	Case Manager Extn	2364

HEALTH RISK ASSESSMENTS

Title	In general, would you say your health is?	Created On
Healthcare Risk Assessment	Excellent	3/21/2018 11:25 ...
Healthcare Risk Assessment	Good	3/22/2018 1:24 P...