



Microsoft Cloud for Healthcare **in a Day**

Lab 03: Patient Outreach

Step-by-Step Lab

April 2021

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Overview

Lab Prerequisites

Note: If you are in an official training, the environment has been set up and provided to you.

This is the **third** lab in a series covering the Microsoft Cloud for Healthcare. The assumption is you have successfully reviewed the preliminary presentations and have completed environment setup.

If you have not completed the environment setup, please reference the following two links:

- [Deploy Microsoft Cloud for Healthcare solutions powered by Dynamics 365](#)
- [Microsoft Cloud for Healthcare Licensing](#)

Before You Begin

Note: If you are in an official training, the user credentials and environment name have been provided to you.

1. You must be connected to the internet.
2. Open an internet browser in either In-Private or Incognito mode.
3. Navigate to [Power Apps](#) and sign-in with your user credentials.
4. Select the correct environment from the upper-right Environment drop down.



Microsoft Cloud Solution Center

This lab focuses on the **Patient Outreach** healthcare solution from Microsoft Cloud Solution Center.

Healthcare solutions for provider

Healthcare Solutions for provider empower providers to personalize patient experiences and deliver seamless care management through patient insights and health team collaboration. These solutions include the FHIR-based patient data model providing a standardized data structure for consistency across applications and seamless integration to 3rd party EMR and EHR systems. For more information click [here](#).

☐ Add all healthcare solutions for provider

Patient Service Center

Has all required licenses

Support patients with patient insights. Share information and set up appointments with patients through chat.

[Quick view](#) ☐ Add

Patient Outreach

Has all required licenses

Reach out to patients for personalized care. Keep your healthcare consumers and patients up to date with emails and events.

[Quick view](#) ☒ Added

Patient Access

Has all required licenses

Facilitate patient access to secure portals and mobile tools for better patient satisfaction and care transparency.

[Quick view](#) ☐ Add

Care Management

Has all required licenses

Organize patient care activities to achieve safer and more effective care.

[Quick view](#) ☐ Add

Home Health

Has all required licenses

Coordinate your home visit team to schedule appointments, manage schedules and conduct home visits.

[Quick view](#) ☐ Add

Virtual Visits

Has all required licenses

Empower your care team and patients to schedule and launch virtual appointments. Note: Setup is completed in the Microsoft Admin Center and requires global admin access.

[Quick view](#) [Go to setup](#)

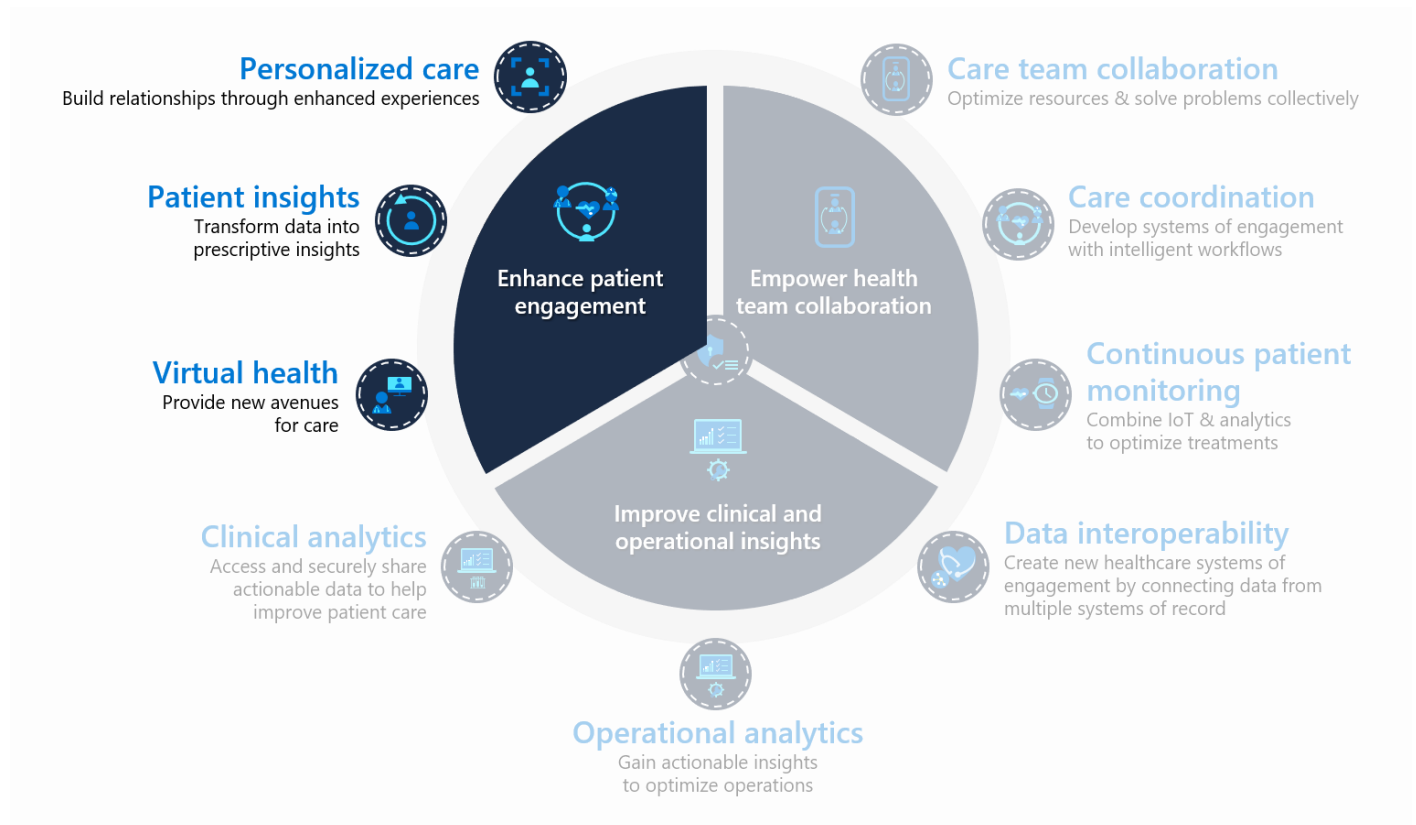
The **Patient Outreach** app allows healthcare providers to communicate with their communities and patients in a targeted, efficient way. Patient Outreach is a patient campaign management application that helps organize and automate marketing and outreach to patients.

Key capabilities of **Patient Outreach** include:

- **Patient segmentation:** Prebuilt patient segments based on the industry standard Healthcare Effectiveness Data and Information Set (HEDIS) to provide baseline patient cohorts.
- **Patient engagement campaigns:** Create healthcare-specific email campaigns that use patient segments based on the HEDIS industry standard.
- **Event management:** Use provider/payor event management templates for event administration and registration.

Industry Prioritized Scenarios

Patient Outreach focuses on the **Enhance patient engagement** priority scenario by creating personalized communication based on patient insights.



Recommended Resources

The following resources provide a full understanding of the Microsoft Cloud for Healthcare and its components and are helpful general resources:

- [Microsoft Cloud for Healthcare Documentation](#)
- [Microsoft Dynamics 365 Documentation](#)

The following additional resources may be helpful throughout the course of the lab.

- [Patient Outreach: Reach out to patients for personalized care](#)

Lab Goals

After this lesson you will be able to:



- Leverage the patient engagement management solution to setup email marketing campaigns for patients and consumers.
- Manage events for patients and consumers

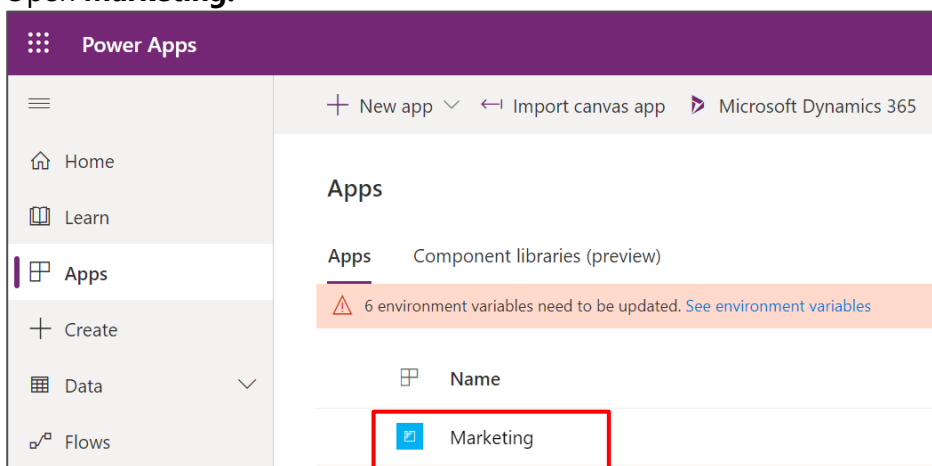


The estimated time to complete this lab is **25** minutes.

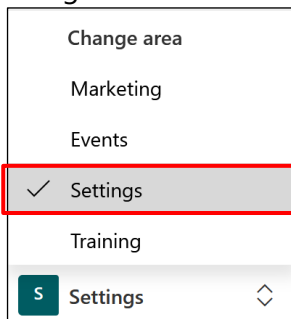
Exercise 1: Create a Patient Segment

In this exercise, you will learn how to create a **Patient Segment** with the Patient Outreach app. A Patient Segment is used to group patients into cohorts based on similar characteristics so that they can be better targeted with marketing communications. In this example, you will create a Patient Segment for patients with hypermetropia (a vision condition in which nearby objects are blurry).

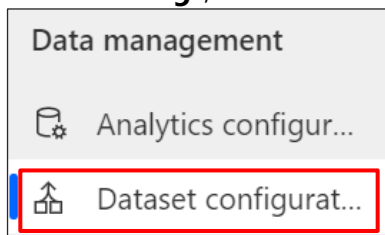
1. Navigate to [Power Apps](#).
2. Open **Marketing**.



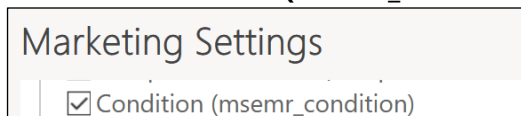
3. Navigate to the bottom left of the screen and change area drop down from Marketing to **Settings**.



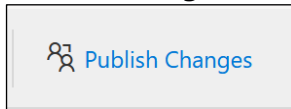
4. Under **Settings**, scroll down to **Data Management** and select **Dataset Configuration**.



5. Select the **Condition (msemr_condition)** entity.



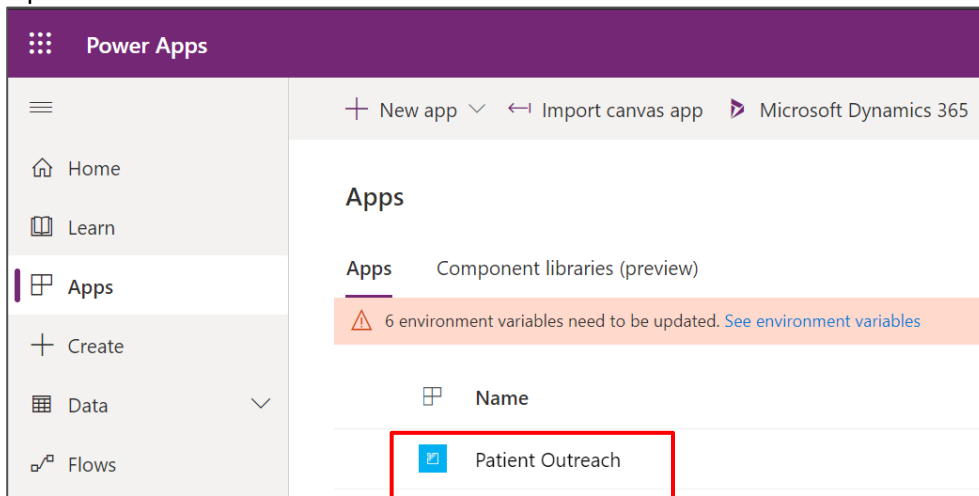
6. **Publish Changes** on the top right.



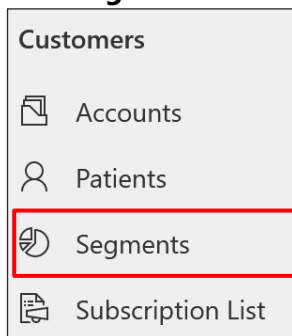
Note: While it may take up to 30 minutes for changes to take effect, they are generally ready in a few minutes.

7. Go back to [Power Apps](#).

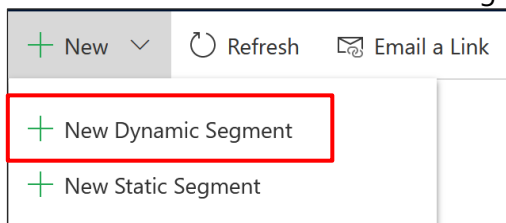
8. Open **Patient Outreach**.



9. Click **Segments** on the left navigation bar to create a new specific group of patients.

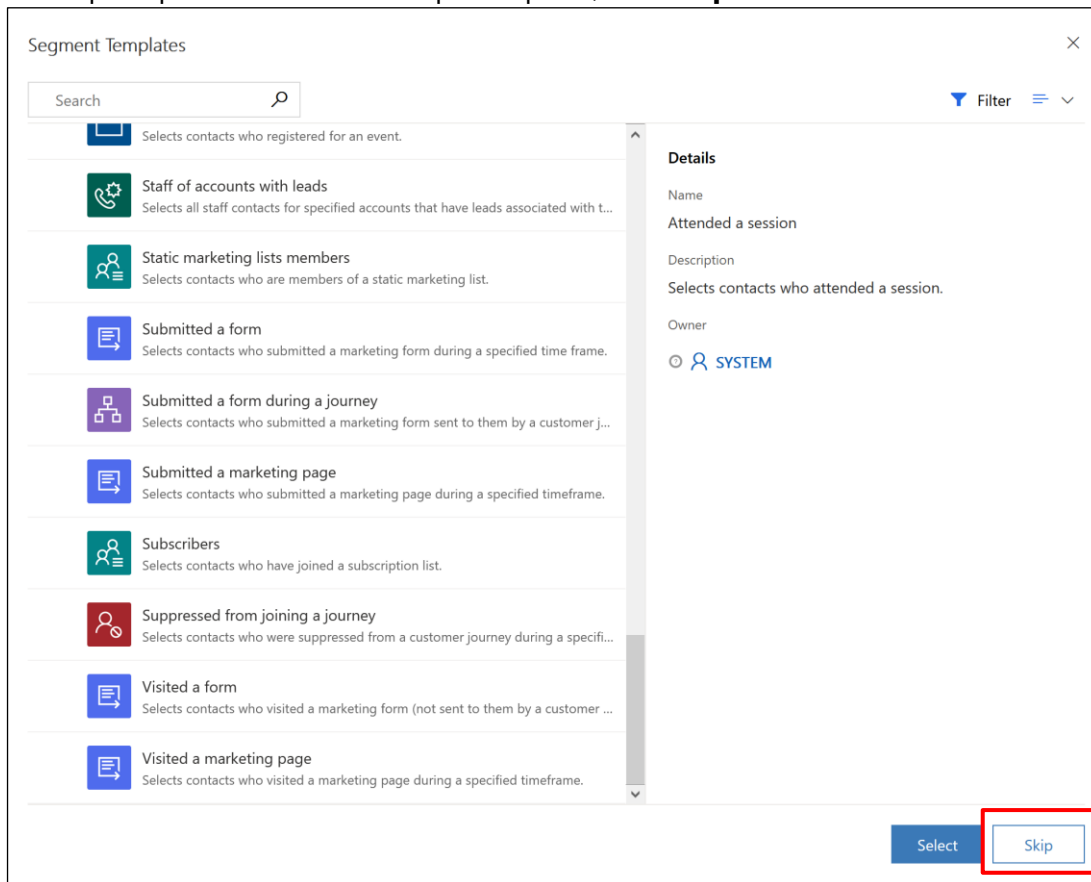


10. Click **New** to create a new Patient Segment. Select **+ New Dynamic Segment**.

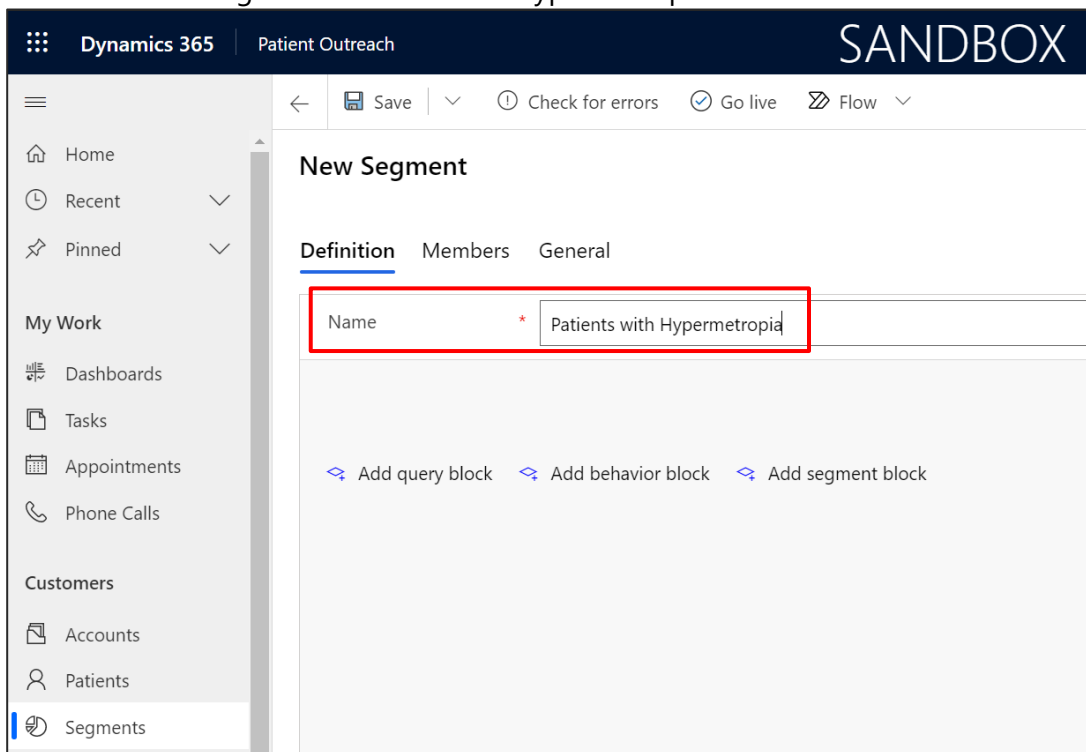


Static segments enable you to choose and add segment members manually based on existing lists or search results. **Dynamic Segments**, which you define by using a set of rules and conditions, are constantly and automatically changing based on information in your database. Since we want our group to change depending on database information, we are choosing the dynamic segment option.

11. When prompted to choose a template option, click **Skip** since we will create our own Segment.



12. **Name** the new Segment "Patients with Hypermetropia".



13. Select **Add query block** to create a new Segment for Active Patients who have a Hypermetropia condition where the Contact has a Status of Active, and the related Condition Description contains "Hypermetropia". Configure the following:
- Leave **Contact** as the main entity
 - Select **Status** from the list of fields and set it **equal** to **Active**
 - Click **Add → Add related entity**. It should default to **AND**.
 - In Select related entity drop down, choose **Condition (Condition -> Contact (Patient))**
 - Click nested **Add → Add condition** to **Condition**
 - Select attribute **Description**
 - Change the operator to **Contains** and type **Hypermetropia**

14. Select **Save** and then select **Go live** to publish the segment (you won't be able to use it in a customer journey until it goes live, even though you've saved it).

15. Wait for about a minute and then select **Refresh** on the command bar to refresh the page. You should now see that a **Members** tab has been added.

16. Click Members to see the Patients who have been added to the Dynamic Segment.

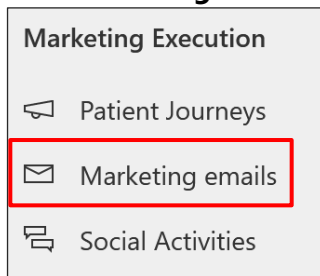
Patients with Hypermetropia			
Segment		Dynamic segment	Live
Name		Segment type	Status reason
Definition		Members	3 Members
Last evaluation 11/13/2020 3:26 PM (Next evaluation time in around 9 minutes) Refresh Search			
Full Name	Email	Company Phone	Household
Casey Jensen5	Casey.Jensen@contoso.com	---	---
Elizabeth Moore	Elizabeth.Moore@contoso.com	---	---
Jessie Irwin	Jessie.Irwin@contoso.com	---	---
1 - 3 of 3 (0 selected)			
ⓘ The segment member list only shows those contacts that you are permitted to view. It may also include additional contacts for which you don't have read permission.			

Congratulations! You have completed the steps to create a patient segment that can be used for patient outreach. This patient segment will be used in the next set of tasks in the next exercise.

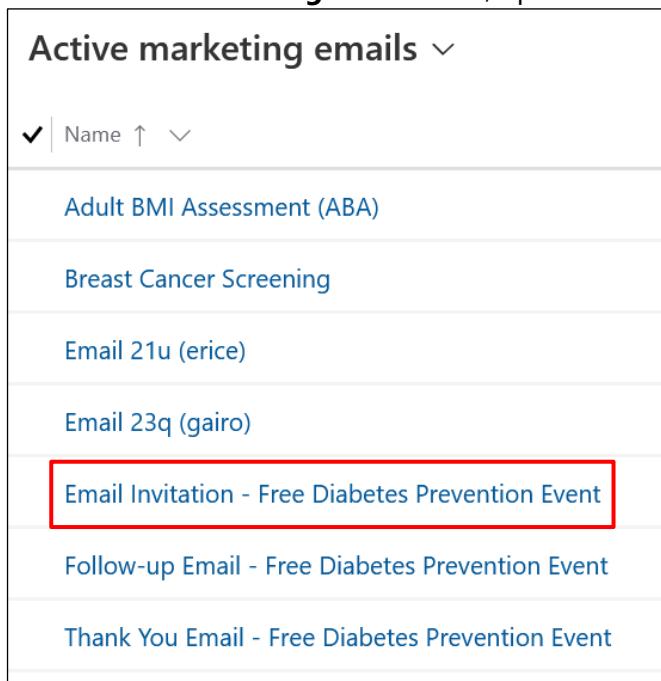
Exercise 2: Create a Marketing Email

In this exercise you will create a marketing email that will be used to reach out to the patient segment that you created in the previous exercise. Marketing emails are used to directly communicate with the patients that reside in a particular patient segment.

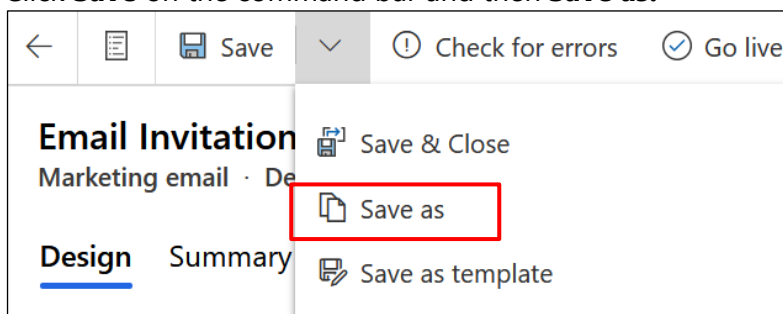
1. In the Patient Outreach app, scroll down to **Marketing Execution** in the left navigation pane and click **Marketing emails**.



2. In the **Active marketing emails** view, open "Email invitation – Free Diabetes Prevention Event".



3. Click **Save** on the command bar and then **Save as**.

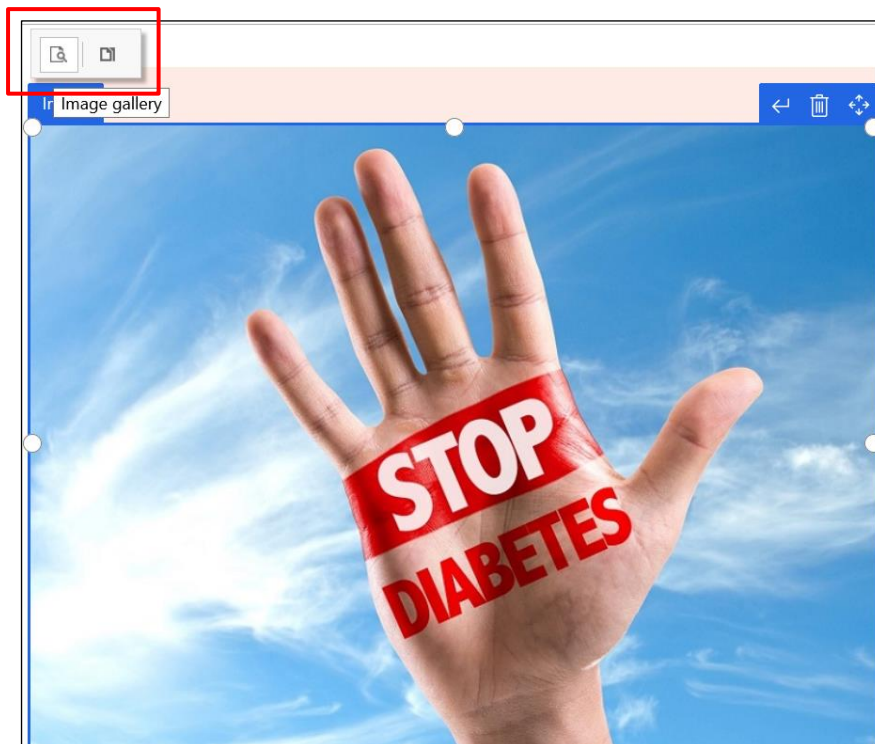


- Change the **Name** of the event to "**Email Invitation – Healthy Eye Seminar Virtual Event**" and the **Description** to "**Healthy Eye Seminar Event**". Click **Save and Close**.

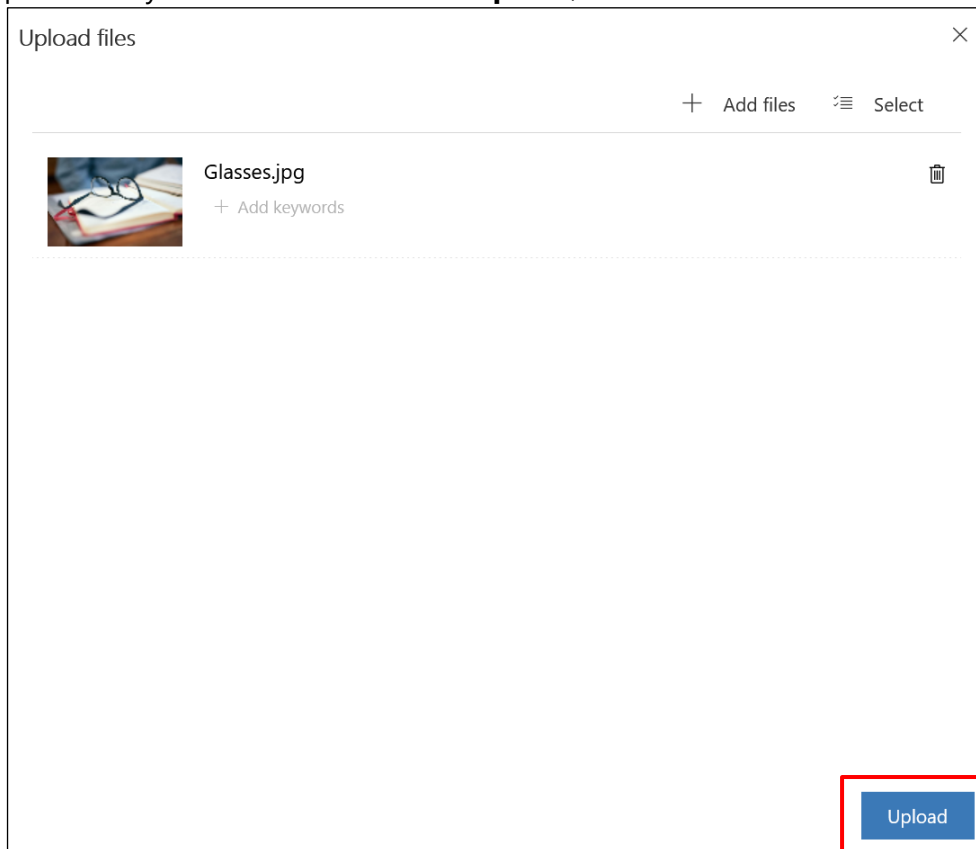
Quick Create: Marketing email

Name	* Email Invitation - Healthy Eye Seminar ...
Owner	*
Subject	{{contact.firstname}}, you are invited!
Legal designation	Commercial
Description	Healthy Eye Seminar Event

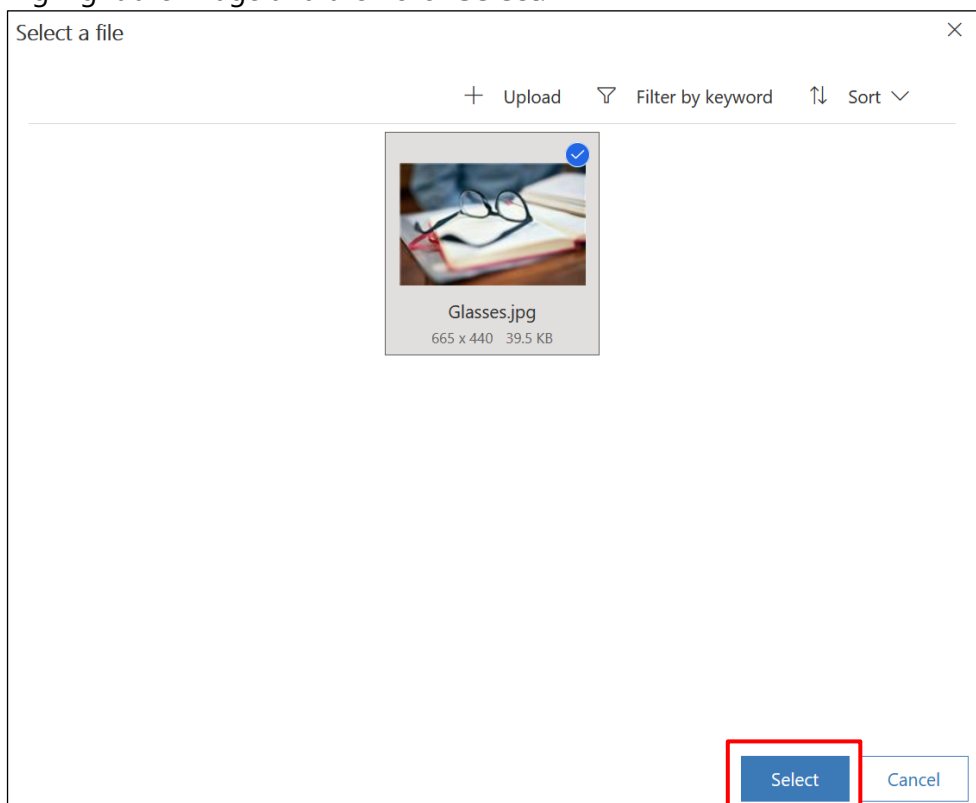
- Navigate back to Marketing emails list and select your newly created segment "**Email Invitation – Healthy Eye Seminar Event**".
- Click the image in the Designer and then click **Image Gallery** in the upper left of the image.



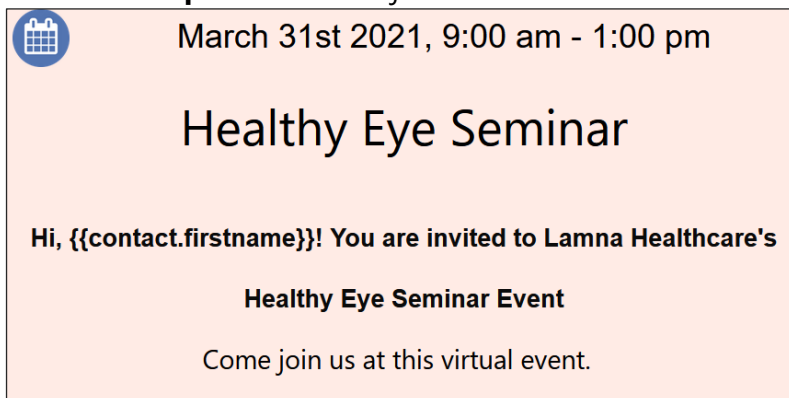
7. Select **Upload**. Select **Add files**. Find and select the file "Glasses.jpg" shared in the Lab Resources provided by the lab instructor. Click **Upload**, then click **Done**.



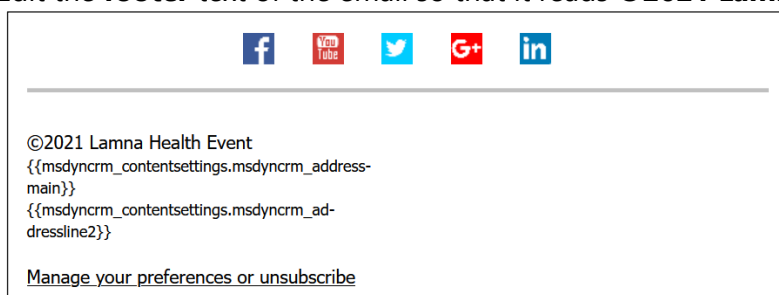
8. Highlight the image and then click **Select**.



9. Edit the text of the email so that it reads similar to the following:
- Date:** Pick a date in the future
 - Headline:** Healthy Eye Seminar
 - Description 1:** "Hi, {{contact.firstname}}! You are invited to Lamna Healthcare's Healthy Eye Seminar Event."
 - Description 2:** "Come join us at this virtual event."



10. Edit the **footer** text of the email so that it reads **©2021 Lamna Health Event**



Note the dynamic text in the email for contact first name and content settings in the footer.

11. Click **Save** on the command bar and then click **Go live**

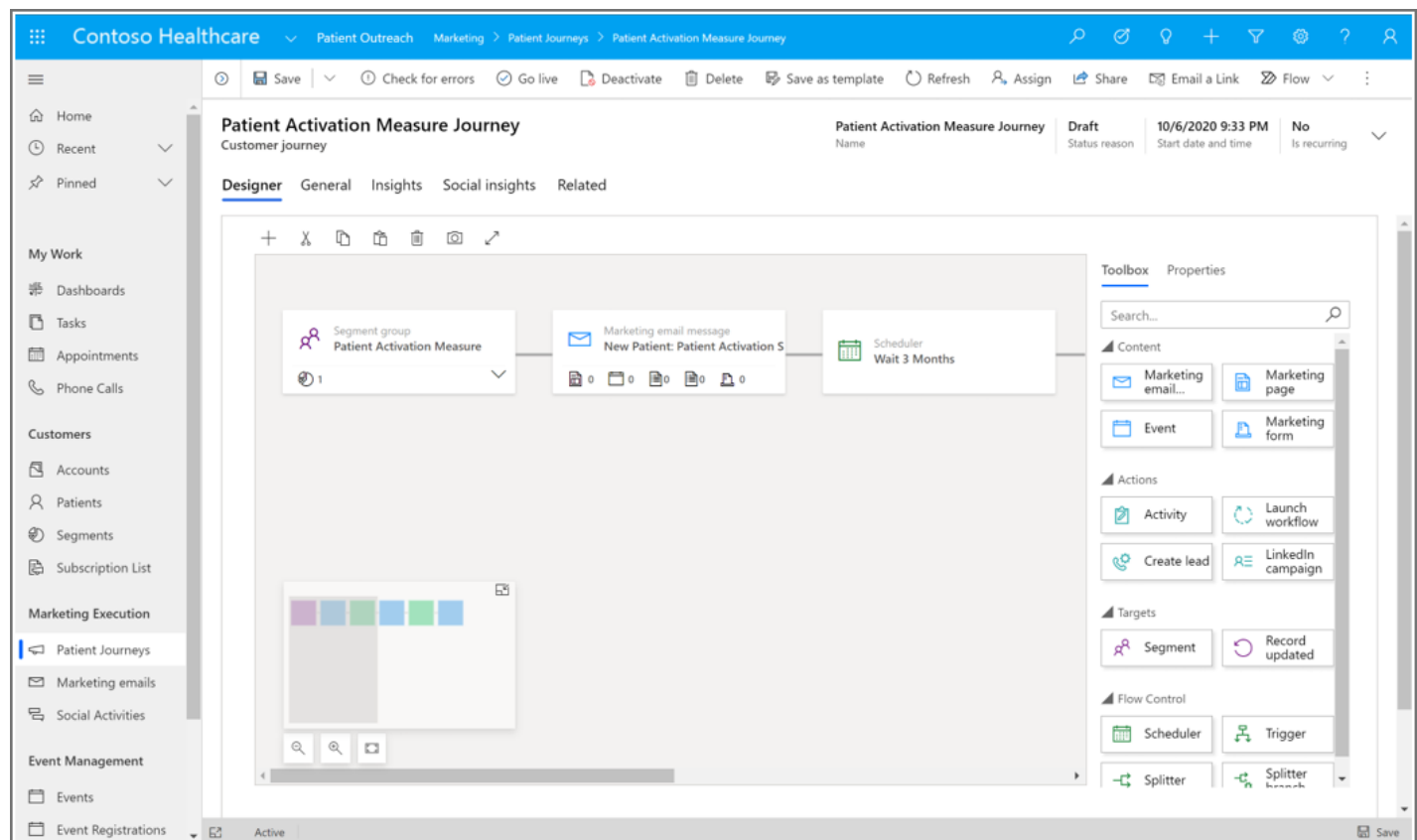


Congratulations! You have completed the steps to create a marketing email that can be used for patient outreach. This marketing email will be used in the next set of tasks in the next exercise.

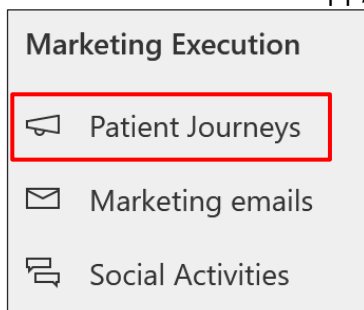
Exercise 3: Create a Patient Journey

In this exercise, you will create a Patient Journey for the patient segment that you created in the first exercise. A **patient journey** can expand your organization's patient outreach marketing capabilities by helping you guide the members of a selected marketing segment through this process by using automated messaging, activity generation, interactive decision points, and more.

Here is an example of a configured **Patient Journey**:



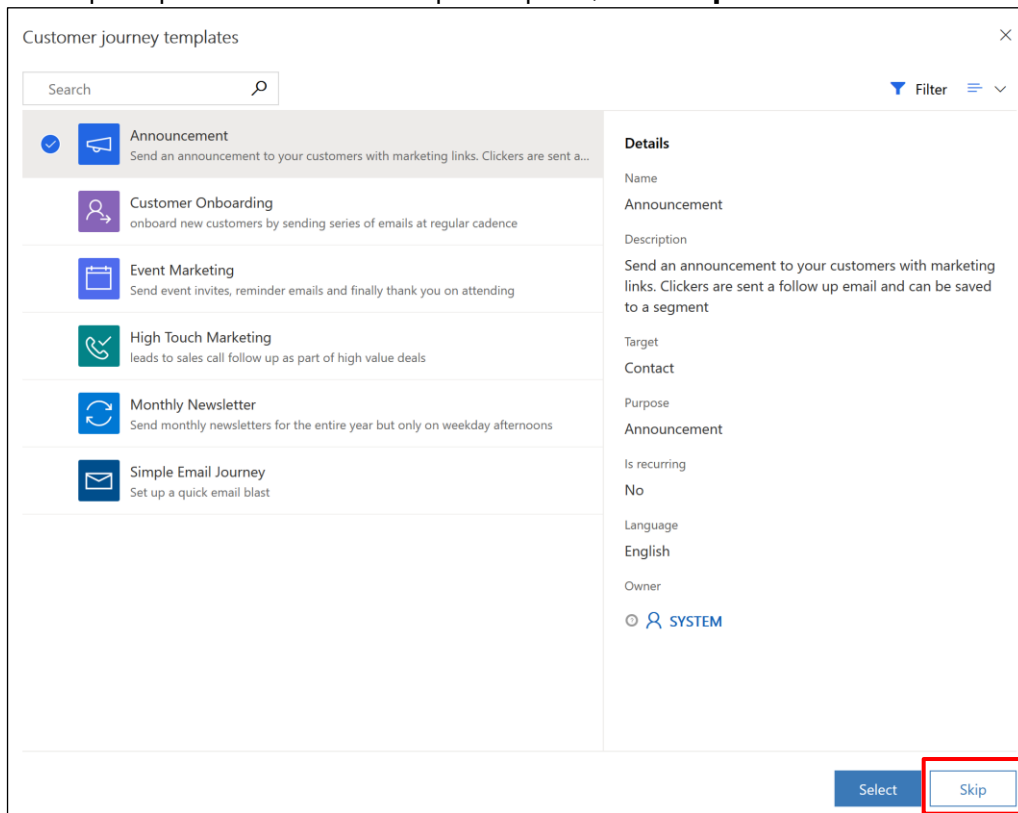
1. In the Patient Outreach app, Click **Patient Journeys** on the Site Map.



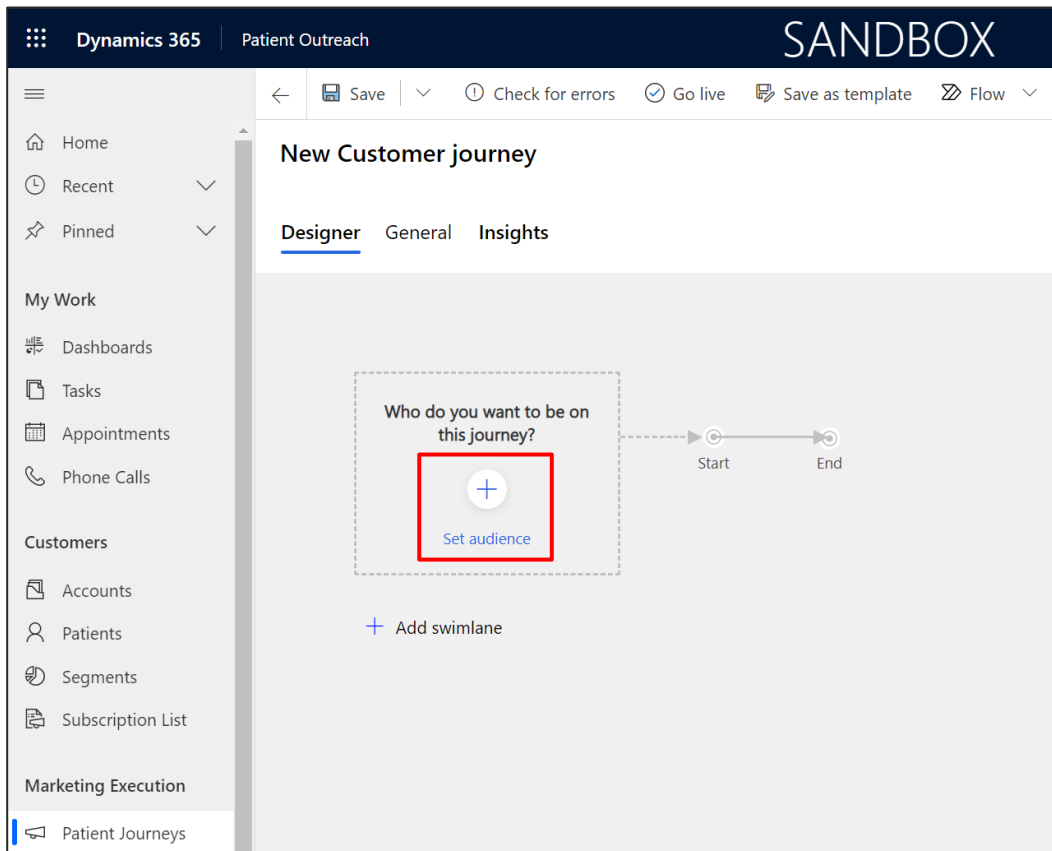
2. Click **New** to create a new Patient Journey.



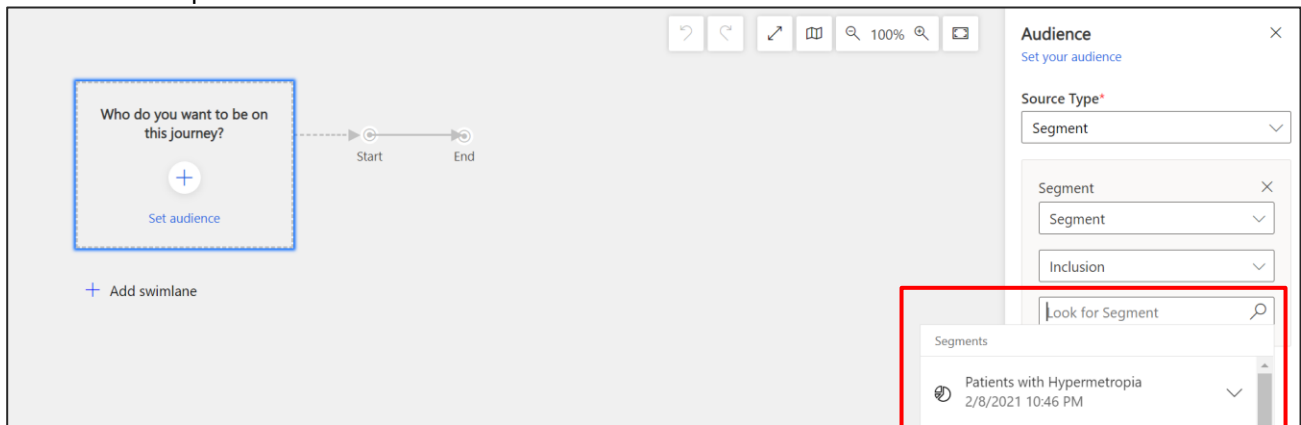
3. When prompted to choose a template option, click **Skip** as we will create our own customer journey.



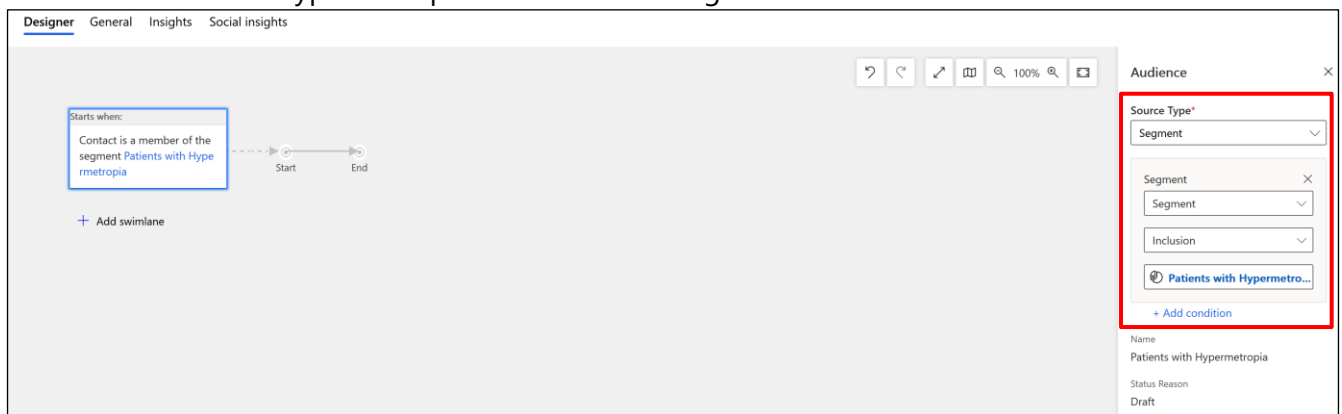
4. In the Designer view under “Who do you want to be on this journey”, select the plus sign to **Set audience**.



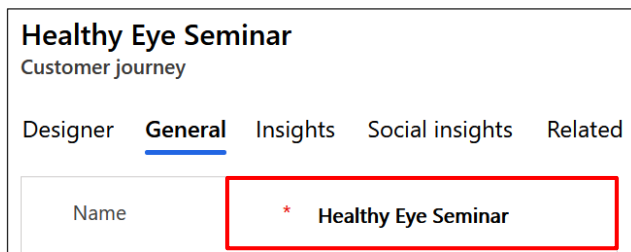
5. In the panel that shows on the right, look for segment "Patients with Hypermetropia" that you created in the previous task.



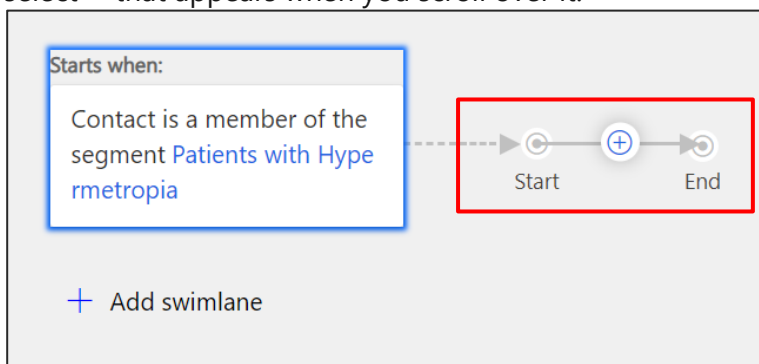
6. Select "Patients with Hypermetropia" for the source segment.



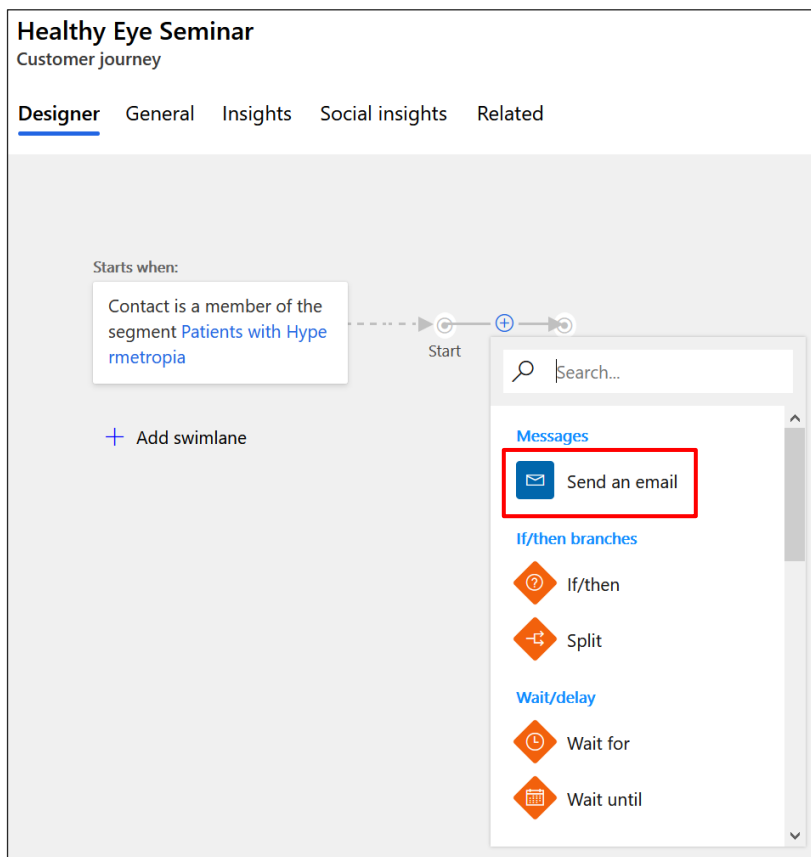
7. Click the **General** view and rename the record to "Healthy Eye Seminar". Click **Save**.



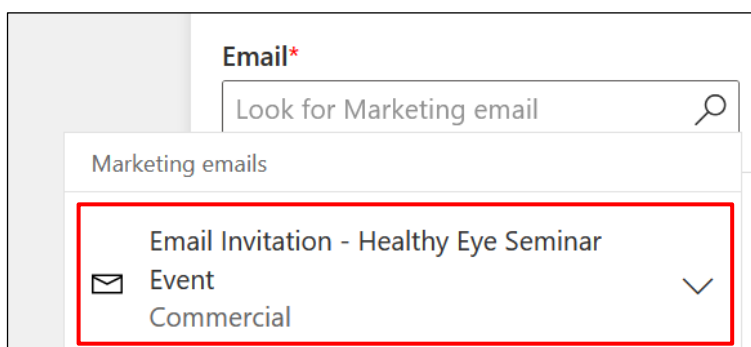
8. Go back to the **Designer** view. On the canvas between the gray arrows after the starting box, select + that appears when you scroll over it.



9. Select **Send an email** from the contextual menu.



10. In the panel on the right for the Email field, select the marketing email **"Email Invitation – Healthy Eye Seminar"** that you created in the previous task.



11. Click **Save**.

The screenshot shows the 'Healthy Eye Seminar' customer journey in the Designer view. The top toolbar includes buttons for Save, Check for errors, Go live, Deactivate, Delete, Save as template, Refresh, Check Access, Export to PDF, and Assign. The 'Save' button is highlighted with a red box. The journey flow starts with a condition 'Contact is a member of the segment Patients with Hype rmetropia', followed by a 'Start' node, then an action 'Send an email' (Email Invitation - Healthy Eye Semina...), and finally an 'End' node. On the right, a preview of the email invitation is shown, titled 'Send an email' and 'Email Invitation - Healthy Eye Seminar Virtual ...'. Below the preview, the 'Email details' section shows 'Legal designation: Commercial' and 'Subject: {{contact.firstname}}, you are invited!'. At the bottom, there is a 'Customer journey template' dropdown and a 'Change template' link.

12. Switch to **General** view and configure the run schedule for your customer journey. Enter a **Start and End** date and time that makes sense for your event. If you want to see insights for the journey, choose an upcoming Start time on today's date. Remember the dates you enter for the next exercise.

Start date and time	1/4/2021	
	1:45 AM	(
End date and time	3/31/2021	
	1:45 AM	(
Time zone	(GMT-08:00) Pacific Time (U'	
Content settings	Default Content Settings	

13. Click **Save**.14. Your journey is now ready to go. To start the journey, navigate back to the Designer view and publish it by selecting **Go live** on the command bar.

This screenshot shows the same 'Healthy Eye Seminar' customer journey in the Designer view. The 'Go live' button in the top toolbar is now highlighted with a red box. The rest of the interface, including the journey flow and the right-hand preview, remains the same as in the previous screenshot.

15. Dynamics 365 Marketing copies the journey to its email marketing service, which executes the journey by processing contacts, performing actions, and collecting results during the time it is set to run. Watch the journey's **Status Reason** as it sequences through **Going Live** to **Live**.

Healthy Eye Seminar
Customer journey

Designer General Insights Social insights Related

Starts when:
Contact is a member of the segment **Patients with Hypertropia**

Contacts in journey: 1

Send an email
Email Invitation - ...

Send an email
Email Invitation - Healthy Eye Seminar Event

Email details
Legal designation
Commercial
Subject
{{contact.firstname}}, you are invited!

16. Once your patient journey runs, you will be able to gather **key metrics and insights** from the record. When this information is available depends on the date and time you chose for the start of the customer journey. You may come back to see the results later if they aren't yet available.

Healthy Eye Seminar
Customer journey

Designer General Insights Social insights Related

Starts when:
Contact is a member of the segment **Patients with Hypertropia**

Contacts in journey: 3

Send an email
Email Invitation - ...

Journey milestones

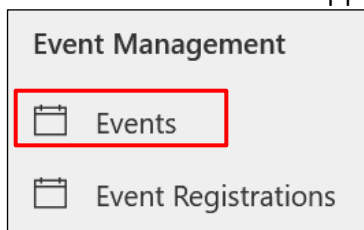
- Journey started
11/15/2020 11:48 PM
- Journey published
11/15/2020 9:50 PM
- Journey created
11/15/2020 9:49 PM

Congratulations! You have created a patient journey by utilizing the patient segment and marketing email that you created in the previous exercise.

Exercise 4: Create Virtual Healthcare Marketing Event

In this exercise, you will create a healthcare-focused, virtual Marketing **Event** that corresponds to the patient journey that you created in the previous exercise. The Marketing event management feature helps you every step of the way, from initial planning and budgeting through promotion and publication, attendee registration, webinar broadcasting, final analytics, lead generation, and evaluation of ROI.

1. In the Patient Outreach application, click **Events** on the Site Map under Event Management.



2. Select **New** on the command bar to create a new event.
3. Enter details for the New Event. Enter **Event Name** as "Healthy Eye Seminar" and enter the same **Schedule details** as you entered for the Marketing email in the previous exercise. Familiarize yourself with the other fields on the forms as part of the Preliminaries event stage.

The screenshot shows the 'New Event' form in the Dynamics 365 Patient Outreach application. The form is titled 'New Event' and has a command bar with 'Save', 'New', and 'Flow' options. The 'Preliminaries (< 1 Min)' stage is selected, indicated by a red circle. The 'General' tab is active, showing 'Key information' and 'Schedule' sections. The 'Event name' field is highlighted with a red box and contains the text 'Healthy Eye Seminar'. The 'Schedule' section is also highlighted with a red box and contains the following details:


Schedule	
Time zone	* (GMT-08:00) Pacific Time (U
Start date	* 1/4/2021 11:45 AM
End date	* 3/31/2021 1:45 AM
Countdown in days	---
This is a recurring event	<input type="checkbox"/> No

The 'Key information' section includes fields for 'Event type', 'Registered' (0), 'Check-in count' (0), and 'Event URL' (---).

4. Click **Save**.
5. Because this will be a virtual event, in the Stream This Event Online section, toggle "**Do you want to stream this event**" to **yes**.

Stream This Event Online

Do you want to stream this event ☐ No




Microsoft Teams is available as a streaming channel

Teams is perfect for an event this size. Choose "Meeting" for two-way group chats or "Live events" for webinars.

Toggle to "Yes" to enable streaming now

Stream This Event Online

Do you want to stream this event ☒ Yes

Streaming provider *  Teams Live Events

6. In the Business Process Flow, select the first stage **Preliminaries**. In the flyout, click **Next Stage**.

Healthy Eye Seminar
Event

EventMainBusinessProce...
Active for 3 minutes

Preliminaries (< 1 Min) | Agenda | Organize

General | Agenda | Website and f... | Information | Social insights

Active for less than one minute

Key information

Event name * Healthy

Event type ---

Registered 0

Check-in count 0

Event URL ---

Event name * Healthy Eye Se...

Primary goal + ---

Expected outcome + ---

Event time zone * (GMT-08:00) Pac

Start date & time * 1/4/2021 11:45 AM

End date & time * 3/31/2021 1:45 AM

Next Stage >

(GMT-08:00) Pacific Time (U

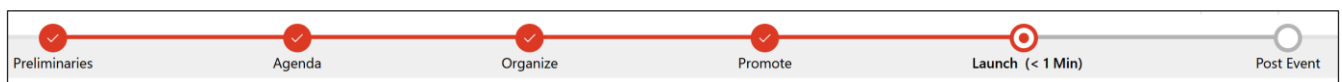
1/4/2021 11:45 AM

3/31/2021 1:45 AM

0

No

7. Advance each stage in the business process flow until you reach the **Launch** stage. Take note of each fields as you advance to the next stage.



8. Click **Go live** on the command bar

Save | New | Delete | Sync with Teams | **Go live**

9. You will now see the Teams meeting URL populated. You can also choose to make the recording available to attendees or enable Q/A for event as well by toggling each selection to Yes along with several other options.


Stream This Event Online

Do you want to stream this event

☒ Yes

Streaming provider

*

 Teams Live Events

Recording available to producers and speakers

☐ No

Recording available to attendees


☐ No

Attendee engagement report

☐ No

Do you want to enable Q/A for this event

☐ No

 Attendee URL

https://teams.microsoft.c...

Congratulations! You have created an event using the Microsoft Cloud for Healthcare. If you would like to learn more about creating events, please reference this article on Microsoft Docs regarding [Event Management Overview](#).

Summary

In this lab, you saw how to leverage the Patient Outreach solution to create an end-to-end patient engagement scenario. You learned how to setup patient segments that group patients by a unifying characteristic, how to create email marketing campaigns and use patient journeys to track them. Finally, you learned how to create events for your patients to attend.

Lab Survey

We would appreciate your feedback on Microsoft Cloud for Healthcare in a Day and this hands-on-lab, such as the quality of documentation and the usefulness of the learning experience.

Please use the survey at <https://aka.ms/MCHIADSurvey> to share your feedback.

You may provide feedback for each module as you complete it or at the end once you've completed all the modules. Thank you!

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