



# Microsoft Cloud for Healthcare **in a Day**

## Lab 02: Home Health

### 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 **second** 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

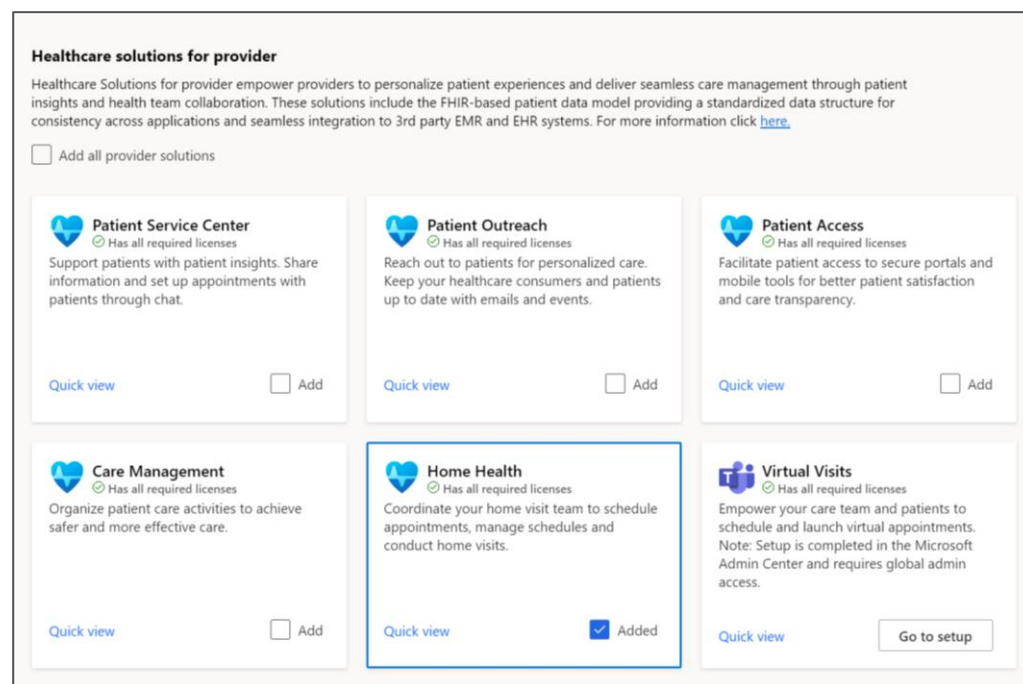
*Note: If you are in an official training, the user credentials and environment have been provided to you.*

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 **Home Health** healthcare solution installed from Microsoft Cloud Solution Center.



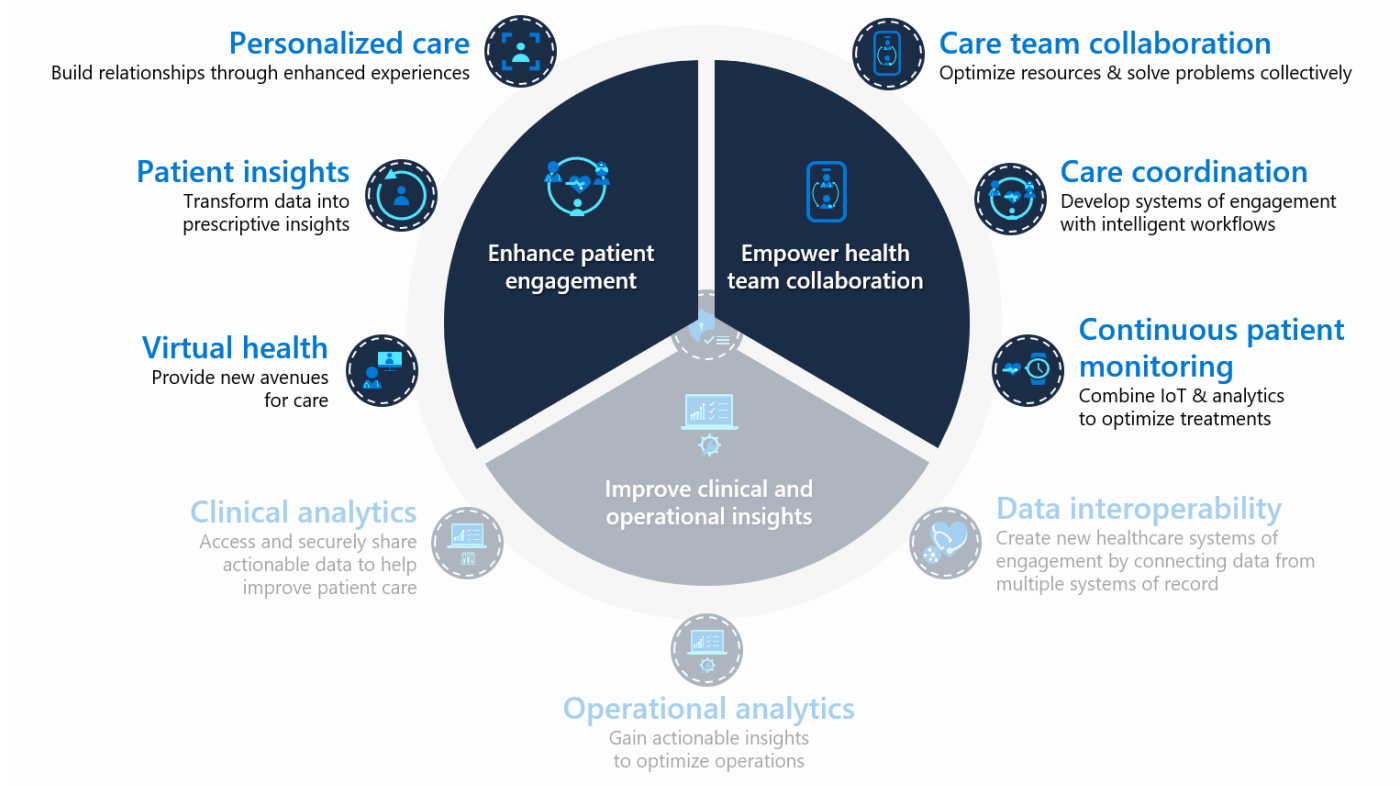
The **Home Health** app allows provider personnel to schedule appointments for the patient based on a variety of factors. It allows for the communication of the right information, at the right time, to the right people, to provide safe and effective care to your patients. Manage home visit schedules, notify patients, and give access to medical information to the provider on the go.

Key capabilities of Home Health include:

- **Schedule home visit:** Enable care coordinators to schedule home visit appointments, while viewing patient information directly in context.
- **Provider scheduling:** View schedules of care team members and optimize visiting routes.
- **Patient engagement:** Notify patients about upcoming appointments, follow up with patients after a visit, and automatically check with patients between visits.
- **Home visit coordination:** Coordinate care and support distinct processes and tasks for the home visit.

## Industry Prioritized Scenarios

Home Health focuses on the **Empower health team collaboration** and **Enhance patient engagement** priority scenarios by creating a system that allows for improved care team coordination with optimized resources and enhanced patient engagement with personalized experiences and home visits.



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

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

- [Home Health – Setting up Bookable Resources](#)
- [Home Health – Types of Scheduling Capabilities](#)

## Lab Goals

After this lesson you will be able to:



- Create and configure Bookable Resources and configure a Schedule Board.
- Manage schedules, set up alerts, and notifications.



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

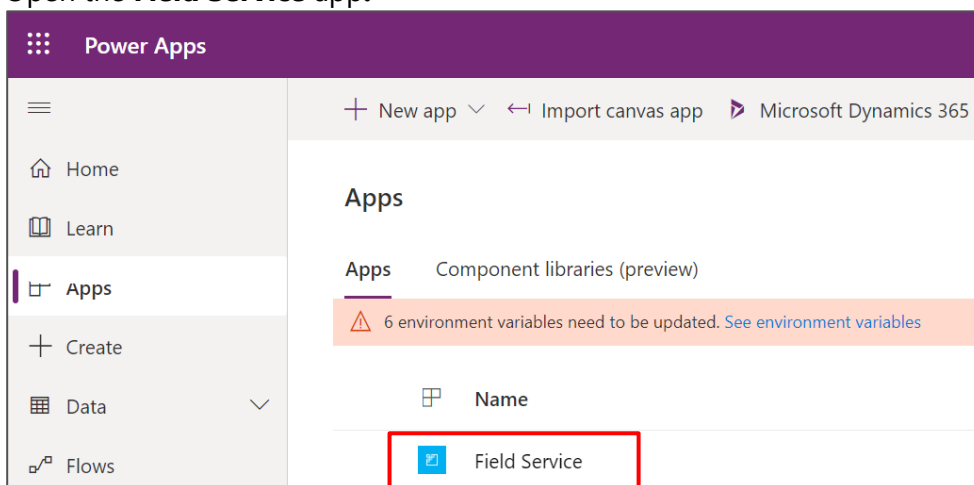
# Exercise 1: Create a Bookable Resource

In this exercise you will learn how to create a **Bookable Resource** to be used for scheduling a Home Health Work Order. A bookable resource in the Microsoft Cloud for Healthcare is anything that needs to be scheduled. This most commonly includes people, equipment, and physical spaces (facilities). Bookable Resources must be created before scheduling a Home Health Work Order.

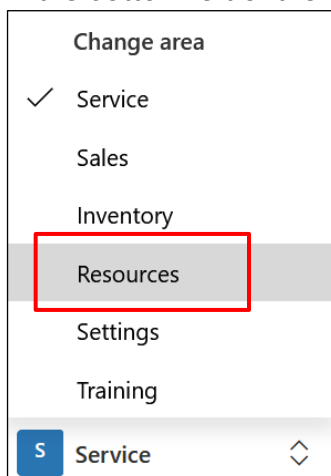
Each resource can have different attributes that distinguish it from others, including but not limited to:

- Characteristics (for example: Accounting)
- Categories (for example: Manager)
- Territories (for example: Washington State)
- Organizational Unit (for example: Seattle Service Delivery)
- Location (for example: Location Agnostic)
- Resource Type (for example: User)

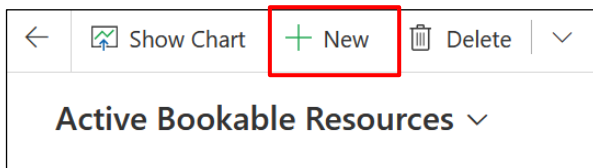
1. Navigate to [Power Apps](#).
2. Open the **Field Service** app.



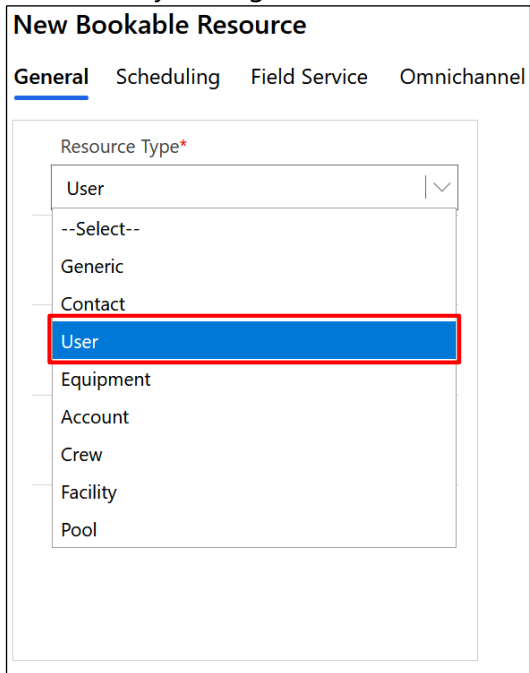
3. In the bottom left of the navigation pane, change the area from **Service** to **Resources**.



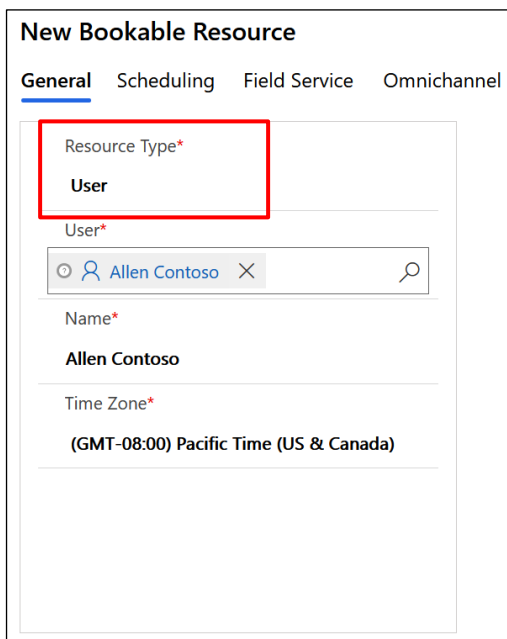
4. Click **New** on the command bar to create a new **Bookable Resource**.



5. Select **Resource Type**. A Resource type is a classification that describes who or what the resource is and how the resource relates to your organization. In this case, select User, who is a person and a member of your organization and needs access to the Field Service Mobile app.



6. Pick a **User** and select their **Time Zone**.



7. Click **Scheduling** to decide where the resource starts and ends his or her working day for scheduling and routing purposes. There are three options available when selecting the **Start/End location** for the Bookable Resource:

- **Location agnostic** - select this option if the location of this resource is not required for the business need and does not need to be considered during the scheduling process. Note that if the work location of a requirement is set to **on site**, location agnostic resources will not return in results.
- **Resource Address** - select this option if the resource starts and ends his or her day at a unique location. The exact location is derived from the latitude and longitude values on the related user, account, or contact records depending on the resource type.
- **Organizational Unit** - select this option if the resource starts and ends the day at an organizational unit, typically representing a company location.

In this case, choose **Location Agnostic**.

8. Click **Field Service** to configure any other aspects of the Bookable Resource. **Save** the record.
9. After **saving** the bookable resource, it's time to set the **working hours** of the resource. Working hours are considered by:

- The schedule board by displaying working and nonworking hours as different colors.
- The schedule assistant by only displaying resources that are working in the result.
- Resource Scheduling Optimization, which automatically books requirements to resources that are working.

Click Show **Working Hours** on the command bar:

10. Click **+New -> Working Hours**.

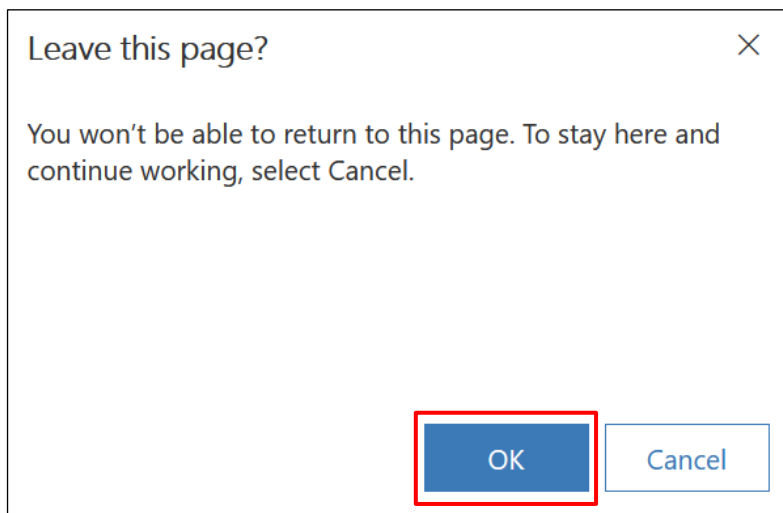


11. Choose **date** you want the working schedule to begin on, the beginning and end **time** of working hours (such as 8am to 5pm), along with a **repeat** option such as "every day" and then click off Sunday and Saturday. Click **Save**.

12. Go back to General and create a **Resource Characteristic** by selecting **+New Bookable Resource Characteristic**.

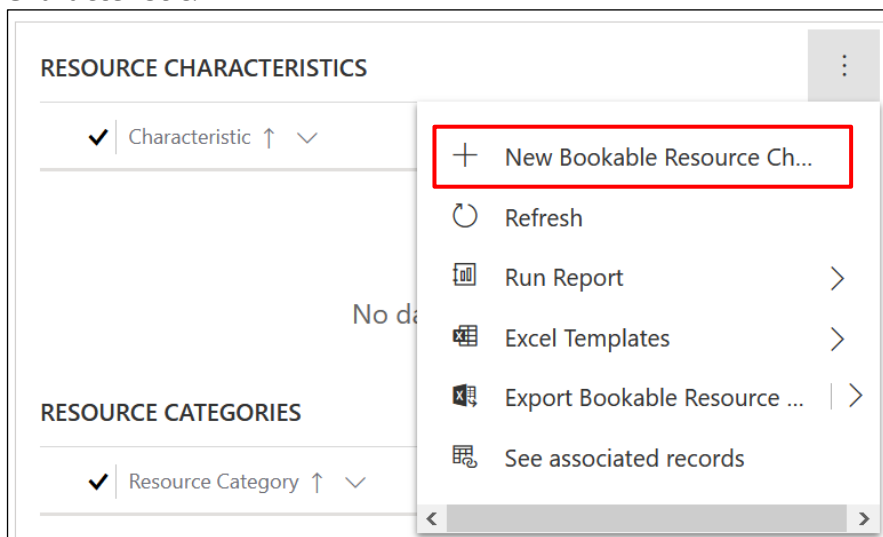
Click the magnifying glass and select **+New Characteristic**.

Click **OK**.

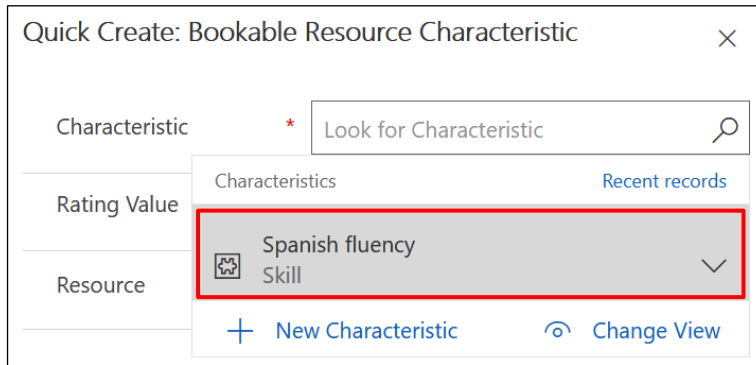


Type **"Spanish fluency"** for the **Name** and click **Save & Close**.

13. Back on the Bookable Resource record on the General tab, click **+New Bookable Resource Characteristic**.



14. Click the magnifying glass and select the **"Spanish fluency" Resource Characteristic** that you just created.



Quick Create: Bookable Resource Characteristic

Characteristic \* Look for Characteristic

Rating Value

Resource

Characteristics Recent records

Spanish fluency Skill

+ New Characteristic Change View

Click **Save & Close**.

**Note:** Characteristics represent a resource's skills and certifications. This could be concrete, like a CPR certification; more general, like accounting or web development experience; or as simple as security clearance for a specific building or fluency in the Spanish language.

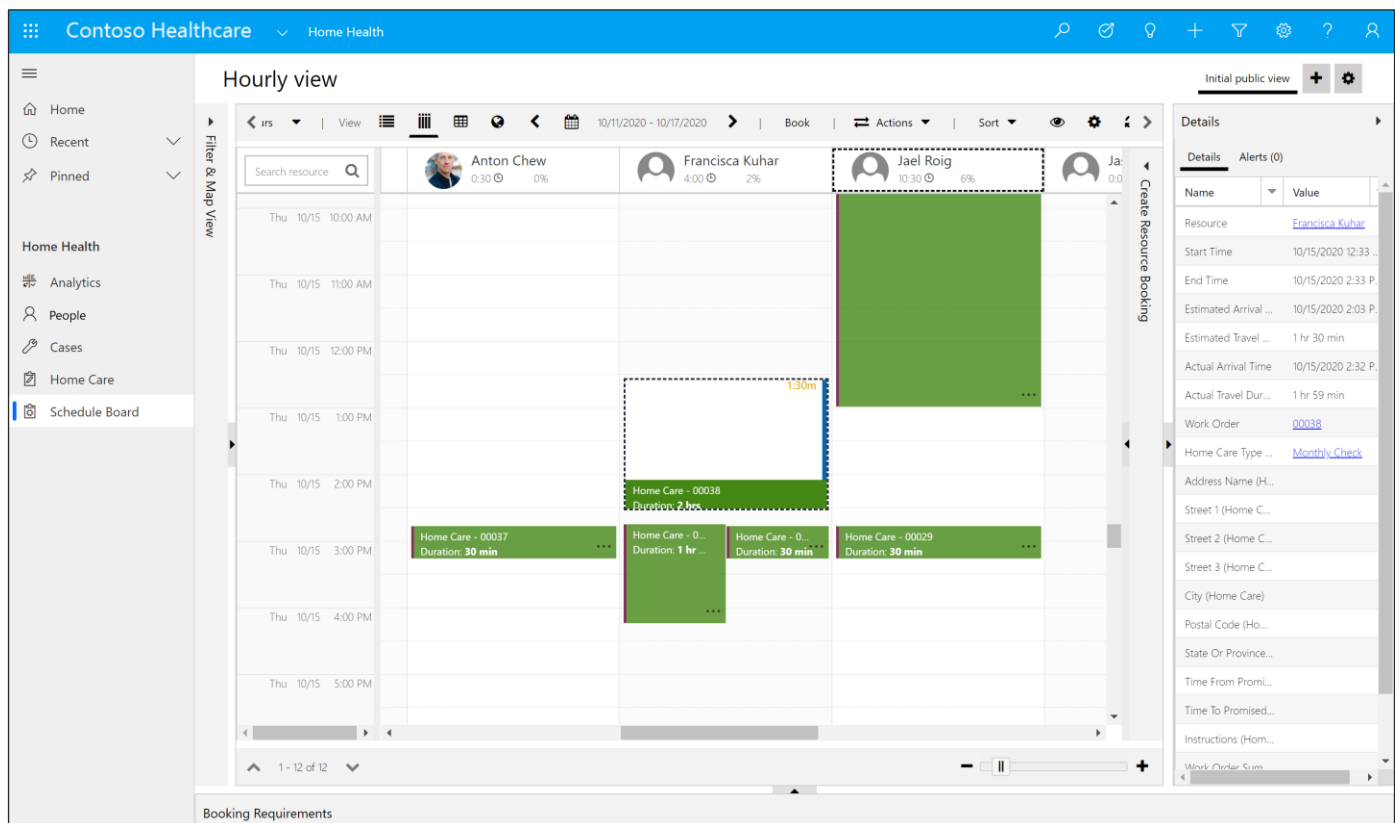
15. Create **two** more **Bookable Resources** following the same process. This time select **Contact** as the **Resource Type** and choose any **Contact** in the system. Choose **Location Agnostic** just as before and click **Save**. Configure the **Work Hours** the same as the previous Bookable Resource and click **Save & Close**.

**Congratulations!** You have created a Bookable Resource. In the next task, we will use this bookable resource to help configure the Schedule Board.

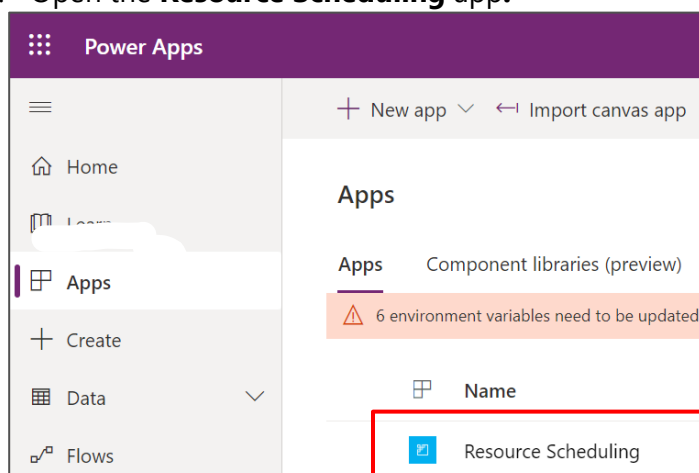
# Exercise 2: Configure the Schedule Board

In this exercise, you will configure the schedule board for the **Bookable Resource** that you created in the previous task. The schedule board provides an overview of resource availability and bookings you can make. Before you use the schedule board, it is important to set up the views and filters to your preference. To use the schedule board booking functionality, geocoding, and location services, you need to turn on maps.

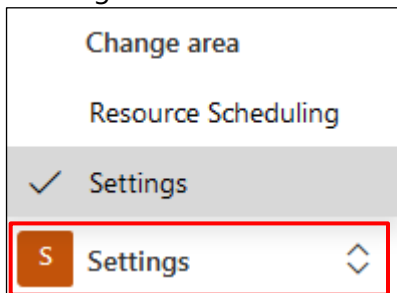
Here is an example of a configured **Schedule Board**:



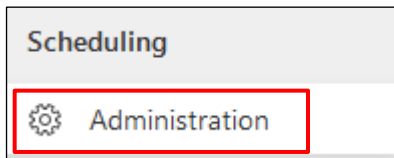
1. Navigate to [Power Apps](#).
2. Open the **Resource Scheduling** app.



3. Change the area in the bottom left navigation drop down from Resource Scheduling to **Settings**.



4. Click **Administration**.



5. Click **Scheduling Parameters**.



6. Change "Connect to Maps" to **Yes** and then click **OK** to accept the terms.

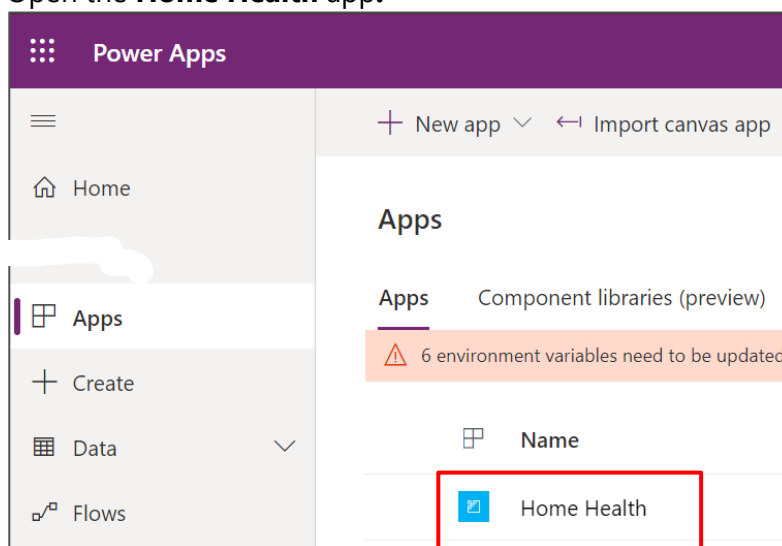
Connect to Maps **Yes**

Disclosure: Enabling this field will allow the system to send addresses and coordinates to an external mapping provider (Bing by default) to represent locations on a map and to calculate distances and travel times. Turning off this feature will disable mapping and distance calculation for resource scheduling purposes.

**OK**

7. Click **Save & Close**.

8. Open the **Home Health** app.



9. Click **Home Care** and open any **Home Care Work Order**.

Work Order Number	Household	Substatus
00029	Wagner Household	---
00020	Contoso, Ltd.	---
00028	Butler Household	---
00026	Irwin Household	---
00032	Wilson Household	---

10. Click **Related** and then click **Characteristics**.

**00029**  
Home Care

**Summary** Patient Information Settings Service Tasks Address Products Timeline Care Team Care Plan **Related**

**GENERAL**

Time Window Start 11/16/2020 12:00 AM

Time Window End 11/16/2020 2:00 AM

Patient [Elizabeth Moore](#)

Household [Wagner Household](#)

Physician [Logan Edwards](#)

Home Visit Number 00029

System Status **Open - Unscheduled**

Substatus ---

Home Visit Type [Home Visit](#)

Home Visit Summary **Replacing a cracked denture**

Price List [Home Visit Price List](#)

**Timeline**

Search timeline

Enter a note...

**Related - Details**

- Resource Bookings
- Incidents
- Products
- Services
- Service Tasks

**Related - Common**

- Activities
- Connections
- Audit History
- Actuals
- Characteristics**
- Resource Preferences
- Requirements
- Time Entries
- IoT Alerts

**Related - Inventory**

- Purchase Orders
- RMAs

Active System Status: Open - Unscheduled Substatus: ---

11. Click **+ New Requirement Characteristic**.

**00029**  
Home Care


**Summary** Patient Information Settings


Show Chart **+ New Requirement Characteristic**

12. Choose **"Spanish fluency"** for the **Characteristic** and a desired Work Order for the **Resource Requirement**. Click **Save & Close**.


**New Requirement Characteristic**

**General** Field Service

Owner \* 

Characteristic \*  **Spanish fluency**


Rating Value ---


Resource Requirement \*  


**Important:** Make sure the **Work Order** number populated in the **Resource Requirement** field matches the Work Order number on the **Field Service** tab.


13. Click **Schedule Board**.

**Home Health**

 Contacts


 Cases

 Home Care

 **Schedule Board**

14. Click the **+** button in the upper right corner to create a new **Schedule Board** tab.

**Hourly view**

Initial public view 

Filter & Map View




Filter **Map View**

11/16/2020

Grayscale Gray

Seattle

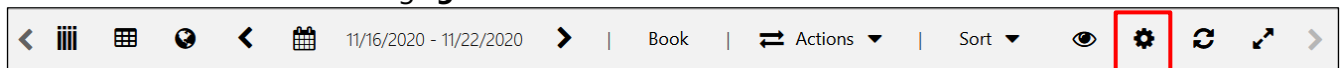
Search resources...

	12:00 AM	1:00 AM	2:00 AM	3:00 AM	4:00 AM	5:00 AM	6:00 AM	7:00 AM	8:00 AM
 Allen Contoso 0.00 0%									
 Cameron Baker 0.00 0%									
 Elizabeth Moore 0.00 0%									

1 - 3 of 3

15. Name the new Schedule Board tab **"My Schedule Board Tab"**. Leave all defaults and click **Add**.

16. Click on the Scheduler Settings **gear**



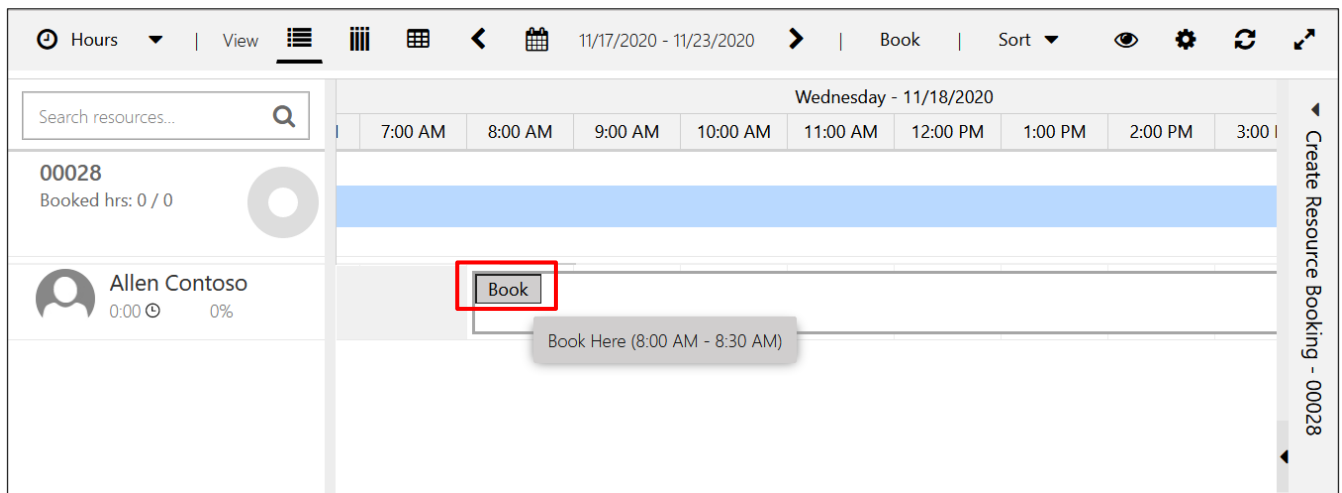
17. Change the Hours view to be closer to typical working hours, such as 6am to 6pm.

18. Find the work order that you added the **Spanish fluency** characteristic to and click on the grid to highlight it. Click **Find Availability** to open the Schedule Assistant filter.

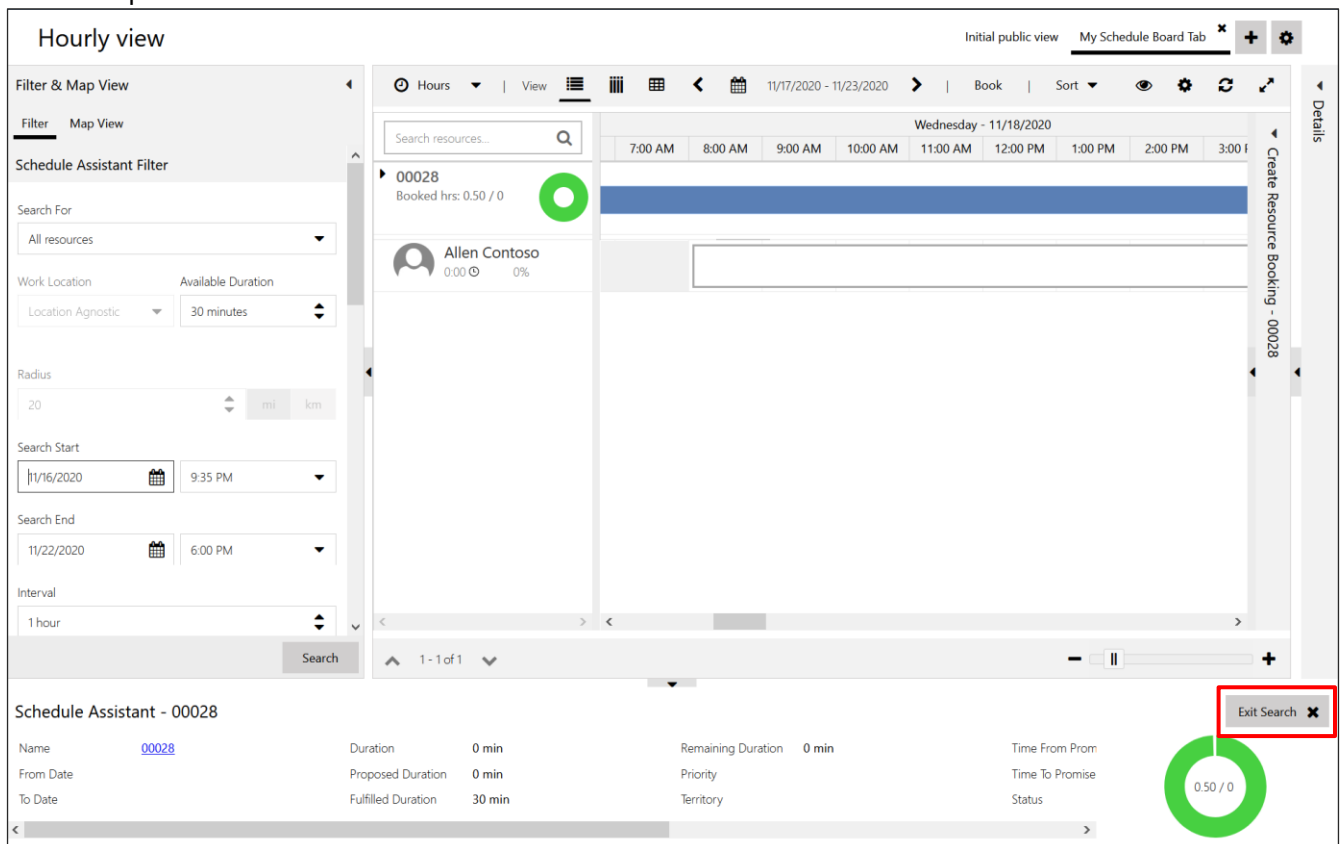
Open Requirements    Unscheduled Service Activities <u>Unscheduled Work Orders</u>															
Work C	Household (Home C	Is Prim	From C	To Date	Duratic	Owner	Status	Priority	Time Fron	Time Tc	Fulfillm	Time Window	Time Winc	Work L	Create
00028	Butler Household	Yes			0 min	SYSTEM	Active					11/07/2020 8:...	11/07/202...	Onsite	10/30/...
00020	Contoso, Ltd.	Yes			0 min	SYSTEM	<b>FIND AVAILABILITY</b>					11/01/2020 1:00 ...	11/01/2020 ...	Onsite	10/30/2...



19. Notice that the other two Bookable Resources that you created that do NOT have the “Spanish fluency” characteristic are dropped from the search. Click the **Book** button on the Bookable Resource’s schedule to schedule the work order.



The work order is now scheduled and has disappeared from the bottom grid. Click **Exit Search** to close the pane.



**Congratulations!** You have configured a Schedule Board tab and scheduled a Home Health visit using the bookable resource that you created in the previous task in this exercise.

# Summary

This lab taught you how to navigate the Home Health solution by creating Bookable Resources, configuring the Schedule Board. There was also a bonus challenge to show you the extensibility possibilities with the Microsoft Cloud for Healthcare by and configuring a business process flow to show an entire home visit scenario.

# 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.

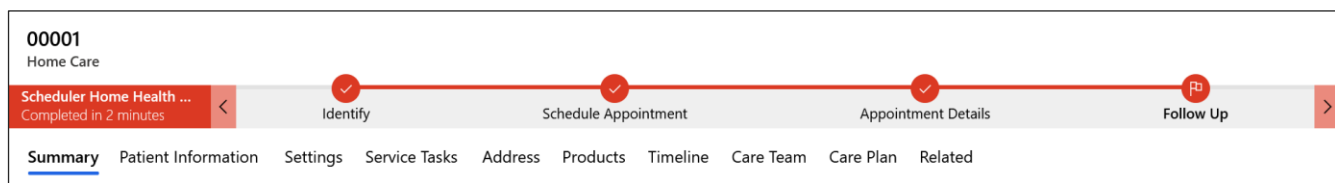
Please use the survey at <https://aka.ms/MCHIADSurvey> to share your feedback.

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

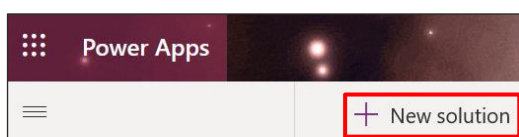
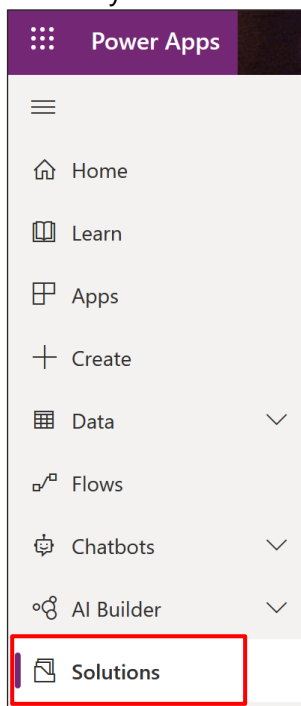
# Bonus Exercise: Configure Business Process Flow for Case to Home Care and Booked Visit

In this exercise, we are going to show you how to modify the Case to Work Order Business Process Flow that ships with the Microsoft Cloud for Healthcare. Business process flows provide a guide for people to get work done. They provide a streamlined user experience that leads people through the processes their organization has defined for interactions that need to be advanced to a conclusion of some kind. This user experience can be tailored so that people with different security roles can have an experience that best suits the work they do.

In this task we will add a condition and a stage to the Scheduler Home Health Business Process Flow that comes with the Microsoft Cloud for Healthcare.



1. Navigate to [Power Apps](#).
2. Choose your environment and go to **Solutions** -> **+ New solution**.



3. Create a new solution by giving it a **Name** and selecting a **Publisher**. This solution will be a container for the new Business Process Flow.

### New solution ✕

Display name \*

Name \*

Publisher \*

CDS Default Publisher

▼

Edit publisher

Version \*

More options ▼

Click **Create**.

Create

Cancel

4. Open the new solution and click + **Add existing** and choose Process to add the Business Process Flow.
5. In the **Search box**, type "Scheduler" and select the "Scheduler Home Health Business Process Flow".

#### Add existing processes ✕

Select processes from other solutions or processes that aren't in solutions yet. Adding processes that aren't already in solutions will also add them to Common Data Service.

1 process selected ▼ Process ▼

Display name ▼	Modified	Type (category) ▼	Managed externally?	Owner	Status
Resource Scheduling - ScheduleRequirementGroup	3 wk ago	Process	🔒	giridhar chowhan	On
<input checked="" type="radio"/> Scheduler Home Health Business Process Flow	2 wk ago	Process	🔒	giridhar chowhan	On
ScheduleRetrain	2 wk ago	Process	🔒	SYSTEM	On

Click **Add**.

Add

Cancel

6. Open the Business Process Flow and click **Save As**.

↻ Update

📋 Validate

⏪ Deactivate

📄 Order Process Flow

7. Provide a new **Name** for the Business Process Flow and click **Save**.

**Power Apps**

**Scheduler Home Health Business Process Flow (Copy) ^**

Process Name \*

**Power Apps**

**Scheduler Home Health Business Process Flow - v2.0 ^**

Process Name \*

8. Go back to your solution and click **+ Add existing** -> **Process**. Search for the Business Process Flow that you just created and add it to your solution.

**Add existing processes** ✕

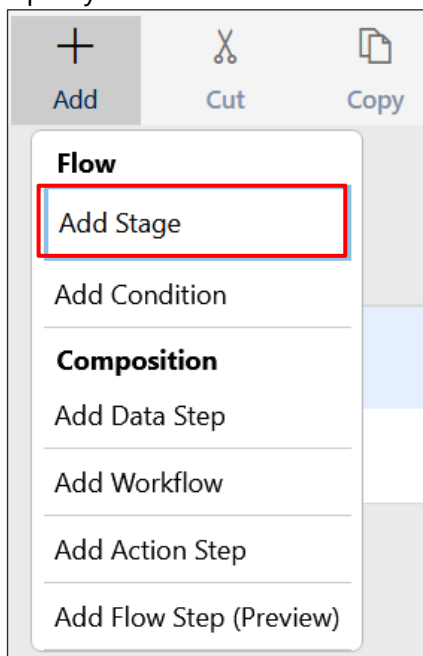
Select processes from other solutions or processes that aren't in solutions yet. Adding processes that aren't already in solutions will also add them to Common Data Service.

1 process selected Process  ✕

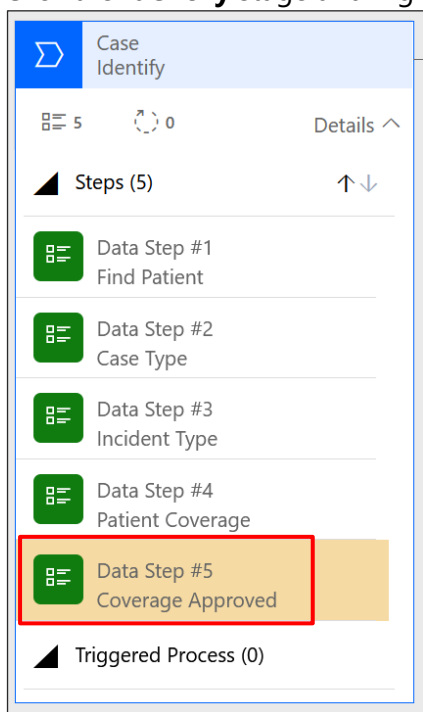
Resource Scheduling - Retrieve Resource Availability	3 wk ago	Process	🔒	On
Resource Scheduling - ScheduleRequirementGroup	3 wk ago	Process	🔒	On
Resource Scheduling - Search Resource Availability	3 wk ago	Process	🔒	On
Resource Scheduling - Search Resource Availability For...	1 d ago	Process	🔒	On
Resource Scheduling - Transform Entity	3 wk ago	Process	🔒	On
Resource Scheduling - UpdateBookingsStatus	3 wk ago	Process	🔒	On
Resource Scheduling - UpdateRequirementDemand	3 wk ago	Process	🔒	On
Resource Scheduling - UpdateRequirementModel	3 wk ago	Process	🔒	On
SchedulePrediction	3 wk ago	Process	🔒	On
<input checked="" type="checkbox"/> Scheduler Home Health Business Process Flow - v2.0	3 min ago	Process	🔒	Off
ScheduleRetrain	3 wk ago	Process	🔒	On
ScheduleTraining	3 wk ago	Process	🔒	On
SchedulingFeatureFlagsDisableChangesToNameOrDes...	1 d ago	Process	🔒	On
UnschedulePrediction	3 wk ago	Process	🔒	On
UnscheduleTraining	3 wk ago	Process	🔒	On

**Add** **Cancel**

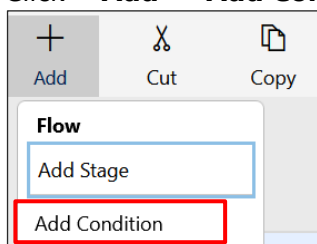
9. Open your new Business Process Flow and click + **Add** -> **Add Stage**.



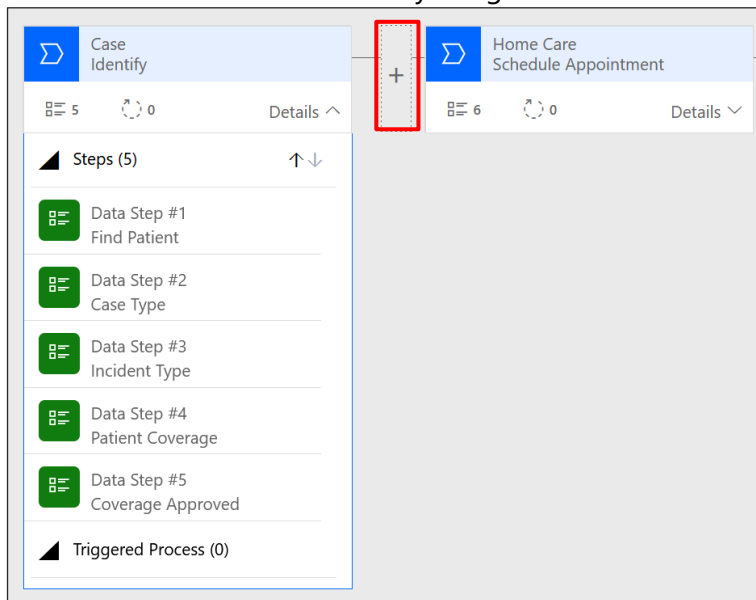
10. Click the **Identify** stage and highlight Data Step #5, **Coverage Approved**.



11. Click + **Add** -> **Add Condition**.



12. Click the + between the "Identify" stage and the "Schedule Appointment" stage.



13. **Name** the Condition "Coverage Approval". Select **Coverage Approved** as the field and click **Yes** for the value. Click **Apply**.

**Condition**

Display Name

Coverage Approval

Rules [+ New](#)

**Rule 1** ✕

Field

Coverage Approved

Operator

Equals

Type

Value

Value

☒ Yes

☐ No

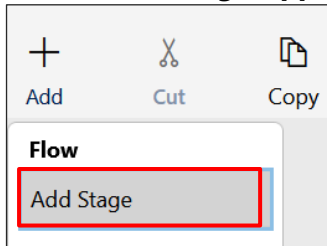
Condition Expression (Text View)

(Coverage Approved Equals [Yes])

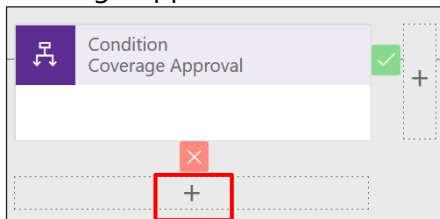
! **Apply** Discard



14. Click the **Coverage Approval** condition on the canvas and then click **+ Add** -> **Add Stage**.



15. Click the **+** under the tile to create a new stage for when the Call Center Agent selects "No" for the Coverage Approved field.



16. **Name** the new stage "Transfer to Patient Services". Add a conditional stage for the true scenario and then click **Apply**.

A screenshot of a 'Stage' configuration form. The form has several fields: 'Display Name' with the text 'Transfer to Patient Services', 'Category' with a dropdown arrow, and 'Entity' with a dropdown arrow showing 'Case'. Below these fields is a section for 'Business Rules' with a link that says 'Business rules for this stage's entity'. At the bottom of the form, there are two buttons: 'Apply' (highlighted with a red rectangular border) and 'Discard'. There is also an information icon (i) to the left of the 'Apply' button.

17. Expand the **Details** on the new **Stage**. Highlight the first **Data Step** and rename it to "Resolve Case". Select **Resolve Case** as the Data Field and click **Apply**.

**Data Step**

Step Name

Resolve Case

Data Field

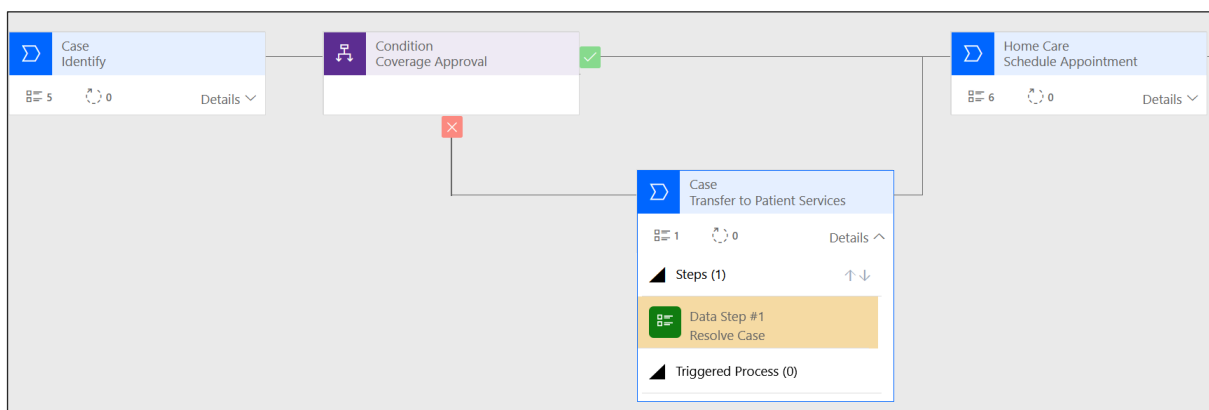
Resolve Case

☒ Required

Sequence

1

**Apply** Discard



18. Click **Save** and close the Business Process Flow.

**Save** Validate Save As Activate

19. Back in your solution, select the original "Scheduler Home Health Business Process Flow" and turn it off.

The screenshot shows the 'Solution Customizations' page in the Microsoft Cloud for Healthcare interface. The breadcrumb navigation is 'Solutions > Solution Customizations'. The top toolbar includes buttons for '+ New', '+ Add existing', 'Edit', 'Remove', and 'Turn off' (highlighted with a red box). Below the toolbar is a table with columns 'Display name', 'Name', and 'Type'. The table contains two rows: the first row is 'Scheduler Home Health Business Process Flow' (Type: Process) and the second row is 'Scheduler Home Health Business Process Flow - v2.0' (Type: Process). The first row is selected, and the 'Turn off' button is highlighted.

20. Then select the new version that you just created and turn it on.

The screenshot shows the 'Solution Customizations' page. The breadcrumb navigation is 'Solutions > Solution Customizations'. The top toolbar includes buttons for '+ New', '+ Add existing', 'Edit', 'Remove', and 'Turn on' (highlighted with a red box). Below the toolbar is a table with columns 'Display name', 'Name', and 'Type'. The table contains two rows: the first row is 'Scheduler Home Health Business Process Flow' (Type: Process) and the second row is 'Scheduler Home Health Business Process Flow - v2.0...' (Type: Process). The second row is selected, and the 'Turn on' button is highlighted.

21. Finally, Publish all customizations.

The screenshot shows the 'Solution Customizations' page. The breadcrumb navigation is 'Solutions > Solution Customizations'. The top toolbar includes buttons for '+ New', '+ Add existing', 'Delete', 'Export', and 'Publish all customizations' (highlighted with a red box). Below the toolbar is a table with columns 'Display name', 'Name', and 'Type'. The table contains two rows: the first row is 'Scheduler Home Health Business Process Flow' (Type: Process) and the second row is 'Scheduler Home Health Business Process Flow - v2.0' (Type: Process).

**Congratulations!** You have created a business process flow for the Microsoft Cloud for Healthcare. If you would like to learn more about business process flows, you can find a more detailed overview here: [Business process flows overview](#).

# Bonus Exercise 2: Leverage Care Management Components with Field Service Mobile App

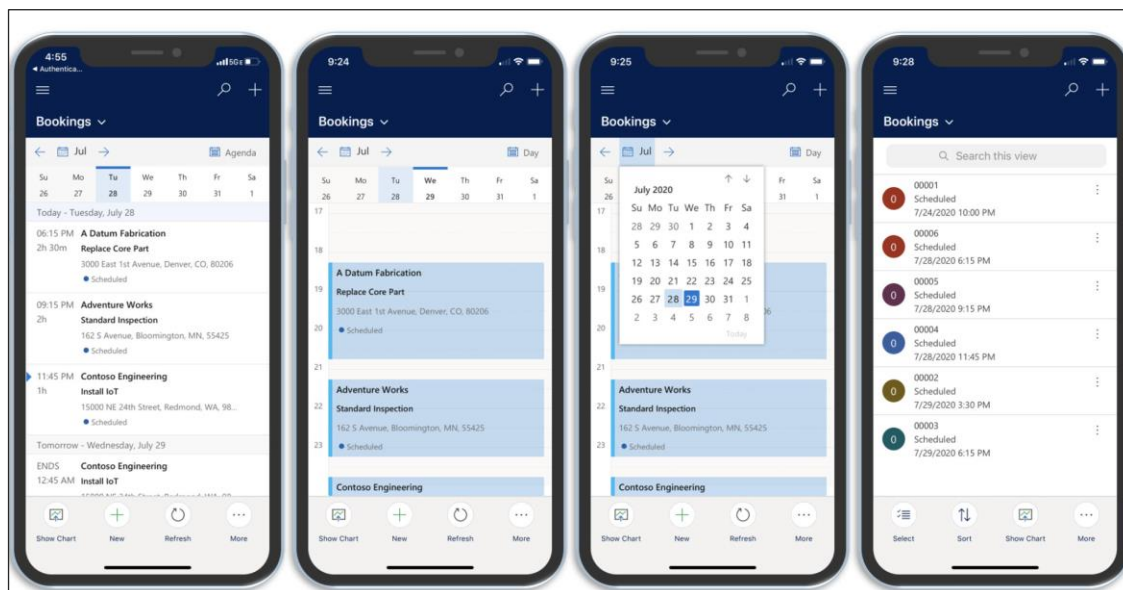
In this bonus exercise, we are going to walk you through the Field Service Mobile App and demonstrate how to leverage Care Management components from the perspective of a Nurse or a Physical Therapist out in the field working with a patient. We will walk through the installation process, how to set up Home Health users and security profiles, and how to use the app to complete work orders.

[The Field Service \(Dynamics 365\) mobile app](#) is designed and optimized for mobile health workers to view Dynamics 365 Home Health work orders and patient information. This mobile app is built on Microsoft Power Platform and is customizable to your business needs with the same admin console as all Dynamics 365 business apps.

It is available natively for Apple iOS and Google Android phones and tablets, the Field Service (Dynamics 365) mobile app offers technicians many capabilities they need to perform onsite customer service, such as:

- A calendar view of assigned jobs.
- Support for picture, video, and asset barcode scanning.
- Customer signature capture.
- Offline capabilities so mobile health workers can continue viewing and recording work in areas without internet.

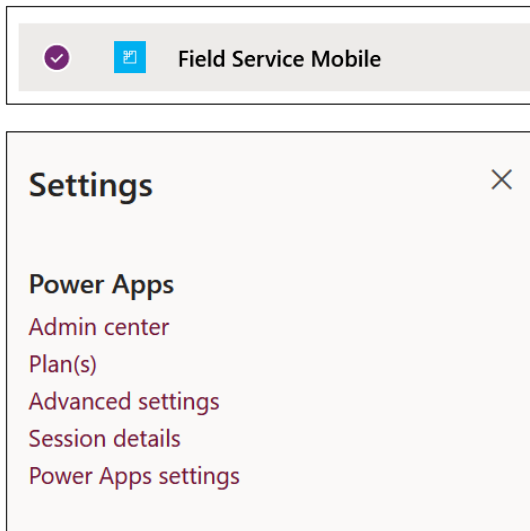
Here is a calendar view of scheduled work orders:



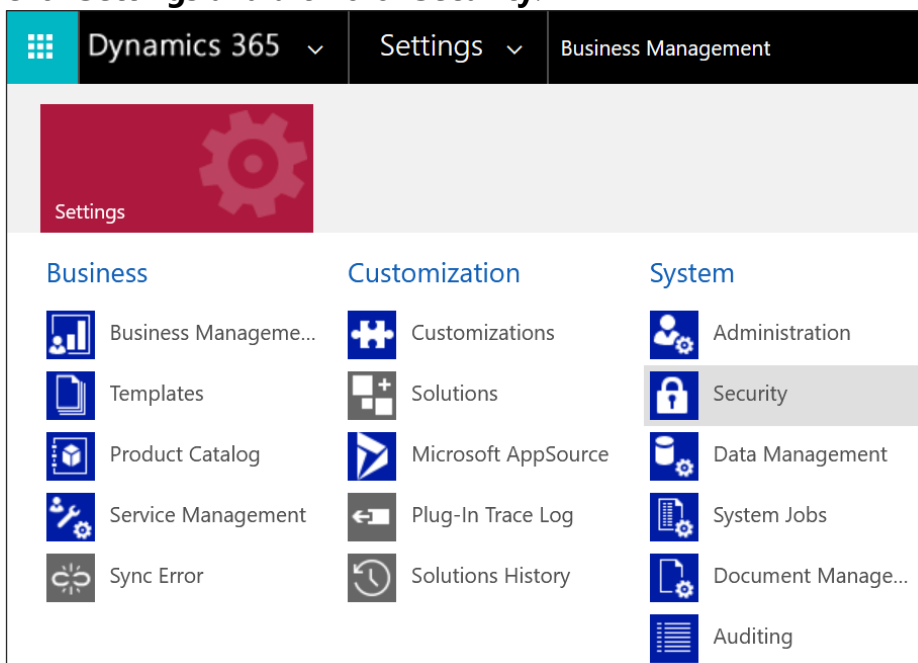
## Task 1: Assign Security Roles to Field Service Mobile Users

In this task we will assign the Field Service Mobile – Resource role to Home Health workers.

1. Navigate to [Power Apps](#).
2. Go to **Apps** to select the **Field Service Mobile app** and then click the **gear icon** in the upper righthand corner and go to **Advanced Settings**.




3. Click **Settings** and then click **Security**.



4. Click **Users** and then change the view to show "**Enabled Users**". Find the user whom you would like to assign the "Field Service Mobile – Resource" role to and select **Manage Roles**.

### Security

**Which feature would you like to work with?**

**Users**  
Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.

### Enabled Users

☐ | Full Name ↑

☒ | Allen Contoso

**MANAGE ROLES**

5. Scroll down to select the “Field Service – Resource” security role and click OK.

### Manage User Roles

What roles would you like to apply to the 1 User you have selected?

Role Name	Business Unit
<input type="checkbox"/> Field Service - Administrator	d14f3d427dab44b391230ff9b81b32
<input type="checkbox"/> Field Service - Dispatcher	d14f3d427dab44b391230ff9b81b32
<input type="checkbox"/> Field Service - Inventory Purchase	d14f3d427dab44b391230ff9b81b32
<input checked="" type="checkbox"/> Field Service - Resource	d14f3d427dab44b391230ff9b81b32
<input type="checkbox"/> Field Service - Salesperson	d14f3d427dab44b391230ff9b81b32
<input type="checkbox"/> FileStoreService App Access	d14f3d427dab44b391230ff9b81b32

OK

Cancel

**Congratulations!** You have assigned the Field Service – Resource role to a Field Service Mobile Home Health user in the Microsoft Cloud for Healthcare.

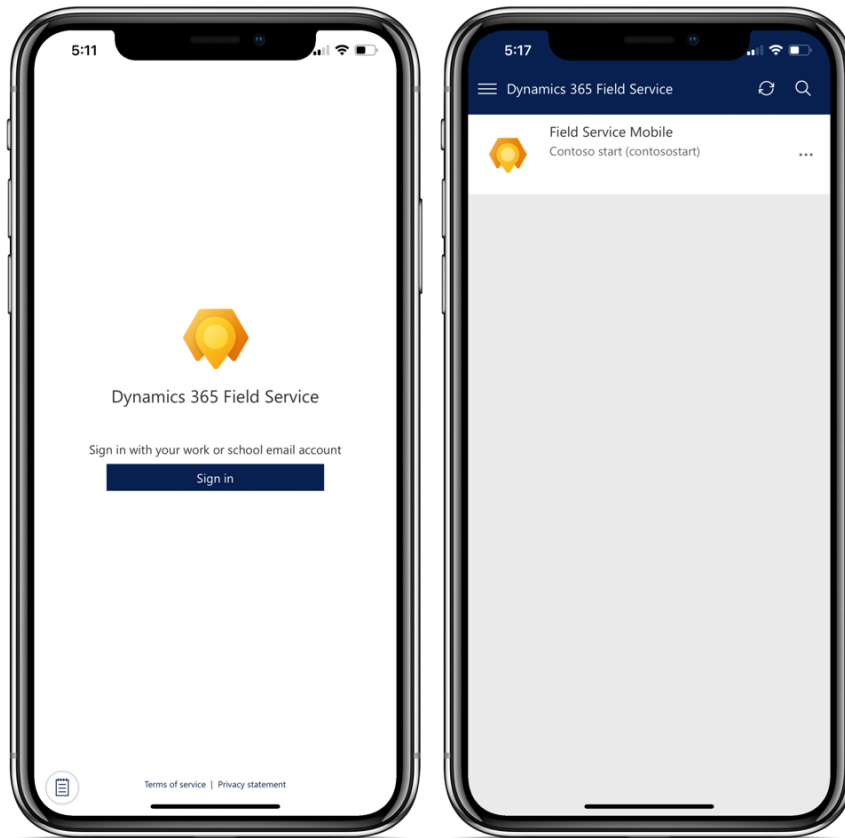
## Task 2: Download the Field Service Mobile app and sign in

In this task, we will walk through how to download the Field Service Mobile app to an iOS or Android device and how to sign in.

1. Go to the app store on your iOS or Android device and search for **Dynamics 365 Field Service**.
2. Download the app called **Field Service (Dynamics 365)**, as seen in the following screenshot. It's the mobile app built on the Power Platform.



3. **Launch** the app and **sign in** with the Microsoft Cloud for Healthcare username and password for the user that you assigned the "Field Service Mobile – Resource" security role to in the previous task.



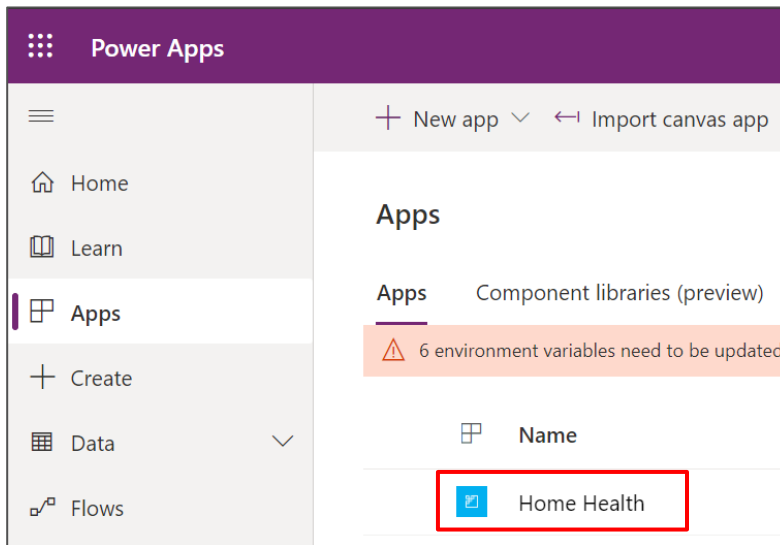
**Congratulations!** You have downloaded and signed into the Field Service Mobile as a Home Health user in the Microsoft Cloud for Healthcare

### Task 3: Use the Field Service Mobile app to manage Home Health Work Orders

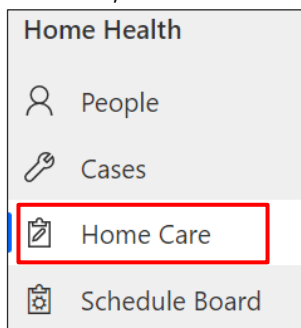
In this task we will assign a Home Health Work Order to our Home Health Bookable Resource, view it and make updates to it in the Field Service mobile app, and then view those changes in the Microsoft Cloud for Healthcare Home Health app.

1. **Navigate** to [Power Apps](#).
2. **Open** the **Home Health** app





3. **Navigate to Home Care** and **open** the unscheduled **Home Care Work Order 00020** for the Contoso, Ltd. Household. (opening any unscheduled Home Care Work Order is fine):



Active Home Cares ▾			
✓ Work Order Number ▾	Household ▾	Substatus ▾	System Status ▾
00020	Contoso, Ltd.	---	Open - Unsched...

4. Scroll down to the **Primary Incident** section and set the **Primary Incident Estimated Duration** to **1 hour** (this will ensure that the work order takes up time on the Resource's calendar once scheduled).

PRIMARY INCIDENT

Primary Incident Type \* ⚠ Defective Monitoring Hardware

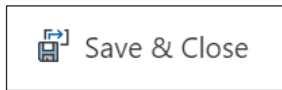
Primary Incident Description Defects covered in patient vitals monitoring hardware

Primary Incident Estimated Duration 1 hour ▾

Primary Incident Customer Asset ---

IoT Alert ---

5. Click **Save & Close**.



6. Navigate to the **Schedule Board** and click **Unscheduled Work Orders**.

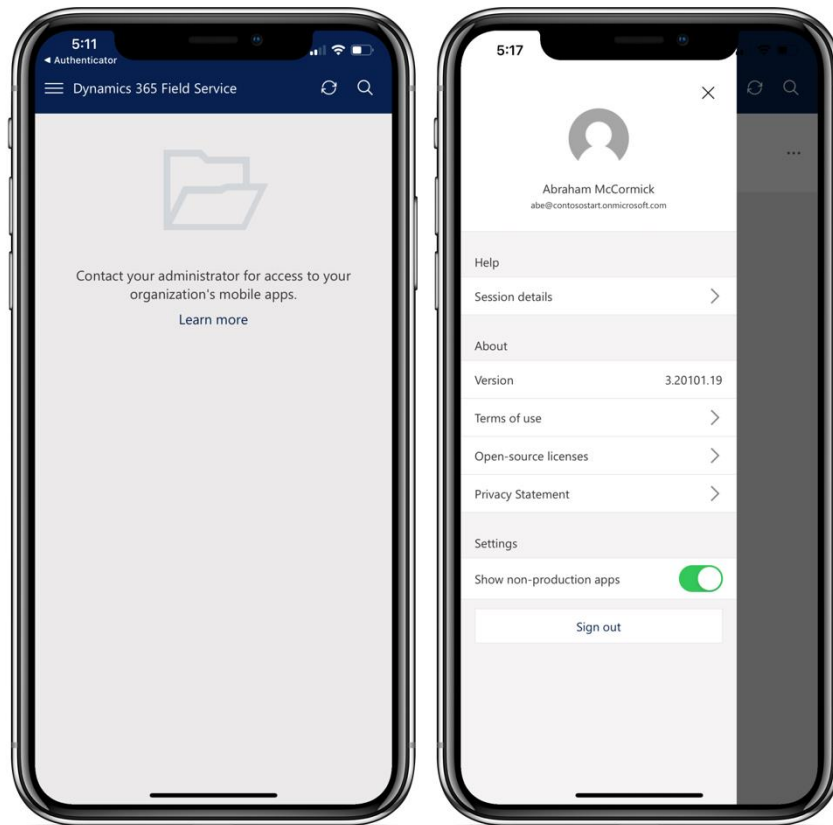
The screenshot shows the Dynamics 365 Home Health interface in "Sandbox" mode. The left navigation pane has "Schedule Board" highlighted with a red box. The main area shows an "Hourly view" for "Allen Contoso" with a time slot grid from 3:00 PM to 3:00 AM. Below the grid, a table of "Unscheduled Work Orders" is visible, with the tab name highlighted by a red box.

Work Order ID	Household (Home Care)	Is Primary	From Date	To Date	Duration	Owner	Status	Priority	Time From	Time To	Fulfillment	Time Window	Time Window	Work Location	Created
00020	Contoso Ltd.	Yes			1 hr	K Venkat	Active					11/01/2020 1:30 ...	11/01/2020 ...	Onsite	02/10/2...
00027	Jensen Household	Yes			1 hr	K Venkat	Active					11/11/2020 7:30 ...	11/11/2020 8...	Onsite	02/10/2...
00026	Irwin Household	Yes			0 min	K Venkat	Active					11/05/2020 7:00...	11/05/2020 ...	Onsite	02/10/2...
00014	Thomson Household	Yes			0 min	K Venkat	Active					11/18/2020 10:0	11/18/2020 1...	Onsite	02/10/2...

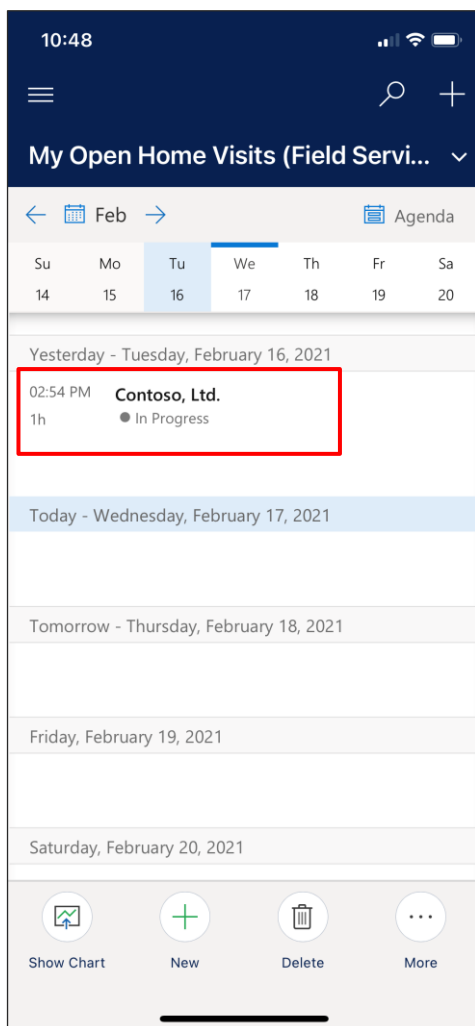
7. Drag the **Home Health Work Order** onto the **Schedule Board** to assign it to your **Bookable Resource**.

The screenshot shows a close-up of the "Hourly view" for "Allen Contoso". A work order is being assigned to the 3:00 PM slot on Tuesday, 2/16/2021. The slot is highlighted in green with the text "Home ... Durati...".

8. On your **mobile device**, log into the **Field Service Mobile App** as your Bookable Resource user. If you encounter a message that says, "Contact your administrator for access to your organization's mobile apps", simply select the menu icon in the top left and toggle **Show non-production apps** to Yes (as the list shows production apps by default).



9. In the list of environments, **find** the In a Day **environment** that you have been working in. From there, you will find the Home Health Work Order in the calendar view in an "In Progress" state.



10. **Click** to open the **Work Order**. Once the Work Order is open, **update** the **Booking Status** from "In Progress" to "Completed" and click **Save**.

10:50

<

00020

Bookable Resource Booking

General

Customer

Service

Notes

Booking Status\*

In Progress

Start Time\*

2/16/2021

2:54 PM

Actual Arrival Time\*

2/16/2021

3:53 PM

End Time\*

2/16/2021

3:54 PM

Duration\*

1 hour

Save

Save & Close

New

More

10:50

Save

Discard

00020

Bookable Resource Booking

General

Customer

Service

Notes

Booking Status\*

Completed

Start Time\*

2/16/2021

2:54 PM

Actual Arrival Time

2/16/2021

3:53 PM

End Time\*

2/17/2021

10:50 AM

Duration\*

19.92 hours

Resource\*

Allen Contoso

10:51

< 🔍 +

**00020**

Bookable Resource Booking

General Customer Service Notes

Booking Status\*  
Completed

Start Time\*  
2/16/2021 2:54 PM

Actual Arrival Time\*  
2/16/2021 3:53 PM

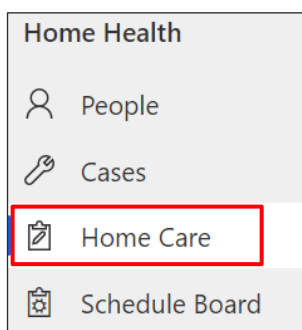
End Time\*  
2/17/2021 10:50 AM

Duration\*  
19.92 hours

Save Saving

Save Save & Close New More

11. **Navigate** back to the **Home Health** app, click **Home Care** on the site map, and find for your Work Order. You will see that the **System Status** has been updated to "Open – Completed".



Active Home Cares ▾				
✓ Work Order Number ▾	Household ▾	Substatus ▾	System Status ▾	
00020	Contoso, Ltd.	---	Open - Complet...	

**Congratulations!** You have assigned a Home Health Work Order to a Home Health Bookable Resource, viewed it and made updates to it in the Field Service mobile app, and then viewed those changes in the Microsoft Cloud for Healthcare Home Health app.



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