Microsoft

Microsoft Vaccination Management in a Day

Lab 03: Registration and Booking Process

Step-by-Step Lab

April 2021

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Overview

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 Microsoft Vaccination Management (MVM). These labs follow a sequence of presentations covering an overview of Microsoft Vaccination Management, Solution Center installation, and the accompanying Data model. Before beginning this lab, confirm that you have provisioned an environment with the necessary components installed as described in following two links:

- MVM Licensing
- Deploy MVM

You must also have completed all previous labs:

- **Lab 01: System Configuration**
- **Lab 02: Data Setup**

Before you Begin

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

Verify the following data setup steps before you begin this lab.

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.

Select the assigned environment (provided by your coach) from the upper-right Environment drop down.

Recommended Resources

The following resources provide a full understanding of Microsoft Vaccination Management and its components and are helpful general resources:

- MVM Homepage
- MVM MS Docs

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

- Power Apps Portals Documentation
- Configure Web Form Steps Power Apps Portals

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Background and Capabilities

Micosoft Vaccination Management Registration capabilities are the process of establishing an individual's phase to determine priority while ensuring equitable access. Can offer pre-registration to notify the individual when their phase is open while also creating visibility to a backlog.

Users and scenarios

This lab covers the following Microsoft Vaccination Management user experiences and scenarios:

Public users, who are looking to:

- Register, if phase is open
- Pre-register, if phase not yet open
- Book appointments
- Receive a confirmation (QR code) once an appointment is booked
- Cancel and reschedule appointments

Vaccination site frontline workers like help desk and volunteers who need to:

- Assist public users in checking an individual's eligibility and phase
- Assist public users in pre-registering to notify an individual when their phase is open

Goals

After this lesson you will be able to do the following:

- Understand Microsoft Vaccination Management Registration and Booking capabilities
- Learn how to check vaccination eligibility and register through the Vaccination Management Portal
- Learn how to book an appointment when you are eligible
- Discover how to configure the Vaccination Management Portal for new questions and scenarios

The estimated time to complete this lab is **60** minutes.

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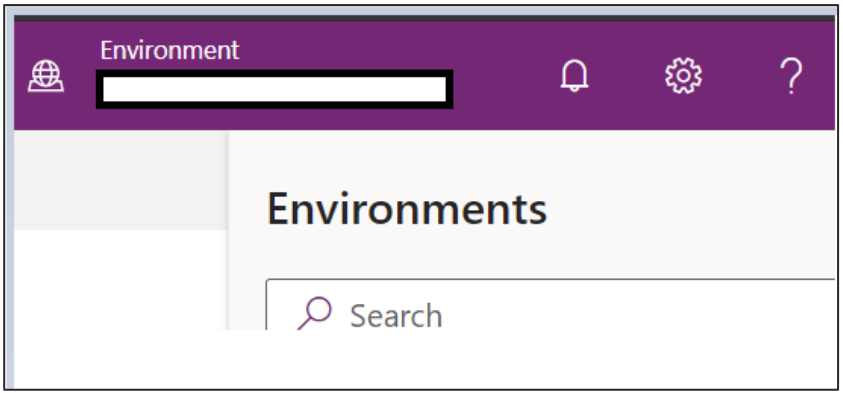
Exercise 1: Register for Vaccination via Portal

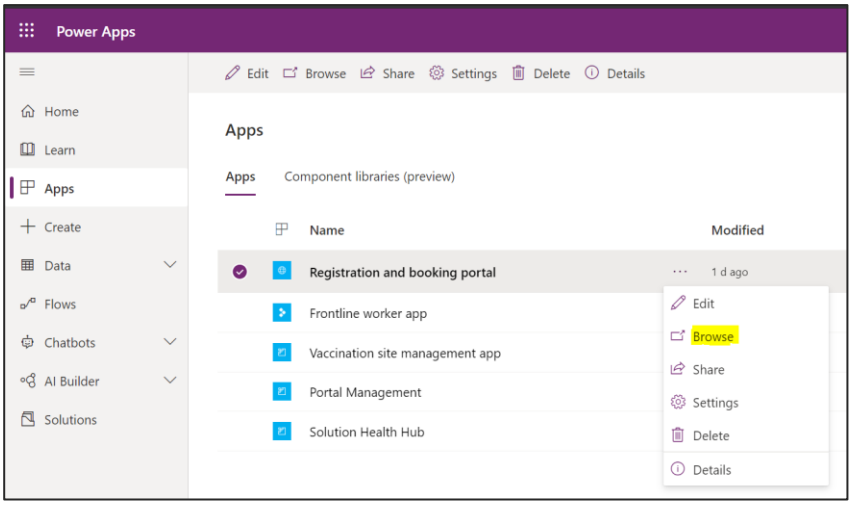
In this exercise, you will assume the persona of a public user who is looking to register for vaccination via the Vaccine Management Portal. You will learn how to browse to the portal, become familiar with the eligibility questions and understand the registration process.

Task 1: Navigate to portal and register for vaccination

1. Launch in-private/incognito mode in your browser and navigate to 'make.powerapps.com' using the user credentials shared by your coach.
2. Select your allocated environment from the list of environments in the dropdown



3. Navigate to **Apps** and locate **Registration and Booking portal** and click on '...' , then **Browse**



4. The portal launches in another tab. Click on **Start registration** button to begin the registration process.

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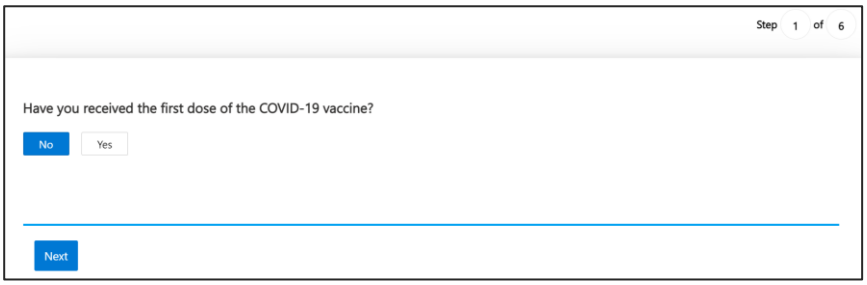
5. Select the responses to the eligibility questionnaire as shown in the screenshots and click on **Next**.

   Have you received the first dose of the COVID-19 vaccine? : **No**



6. Alternately, you can also select **Yes** for above question if you have already taken the dose 1 and set values shown below and click **Next**

   Note: You can either do step 5 or step 6 and click on **Next**

   Have you received the first dose of the COVID-19 vaccine? : **Yes**

   Did we administer that dose **: Any option No/Yes**

   What was the date of your first dose? : **<Any date in past>**

   What was the vaccine type? : **<Choose any from list>**

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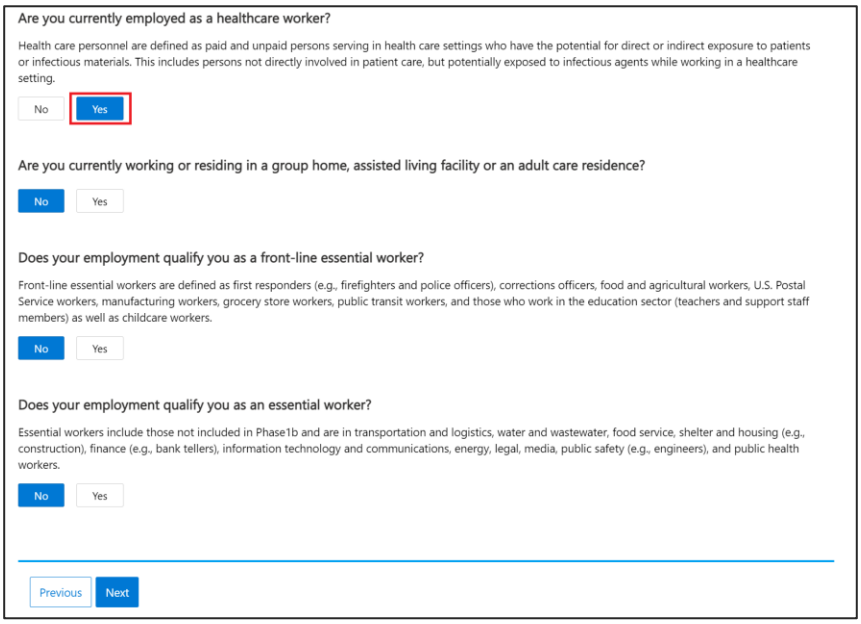
7. Select Yes only for the below question and default pre-selected responses for others and click **Next**

   Are you currently employed as a healthcare worker? : **Yes**



8. Select default pre-selected responses and click **Next**

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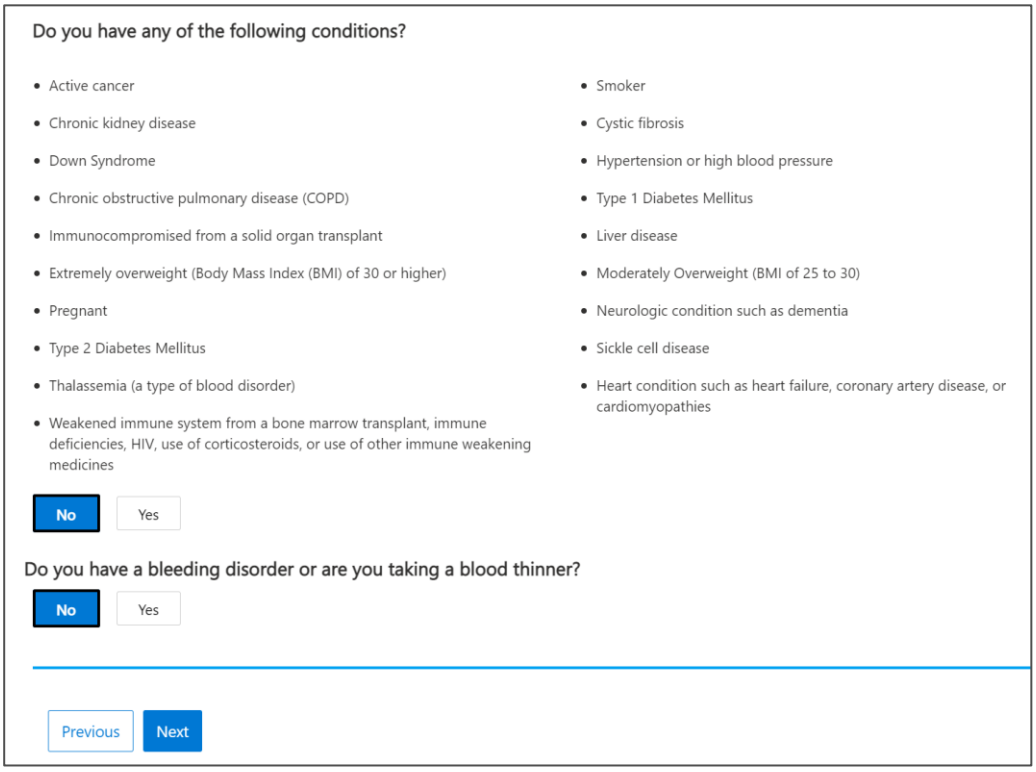
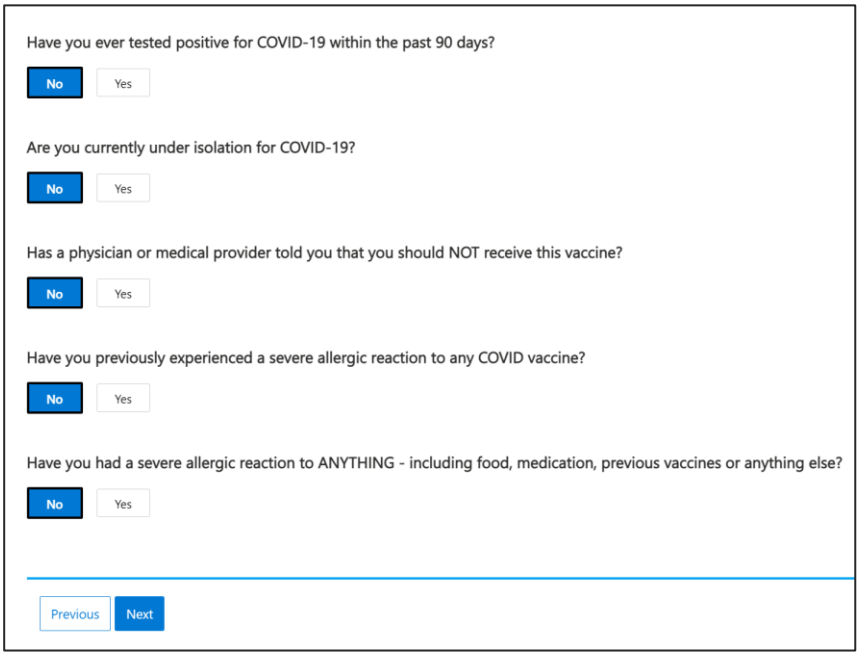


9. Select default pre-selected responses and click **Next**



10. At this step, you will create **three** new residents records that we will book as appointments for today. Fill out the following values fields and ensure the **email address** is a valid one so that you can receive booking notifications and take action on the next steps.

    a. **Resident One**:

        i. **First Name**: Madison

        ii. **Last Name**: Butler

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iii. **Race**: Asian

iv. **Ethnicity**: Not Hispanic or Latino

v. **Gender**: Female

vi. **Date of Birth**: February 01, 1967 *Note this value and keep for reference, this would be required in later exercises

vii. **Street Address**: 123 23rd Street

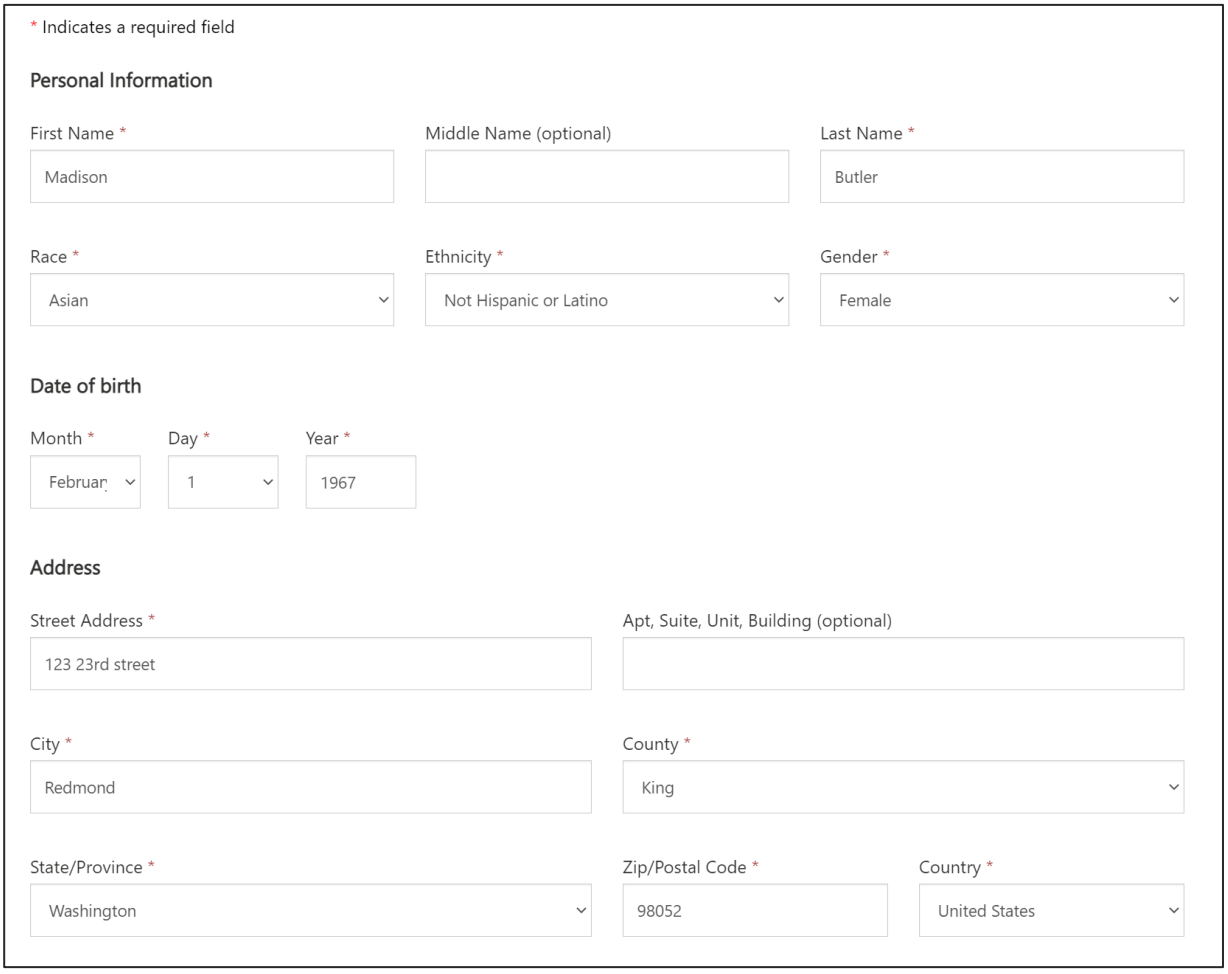
viii. **City**: Redmond

ix. **County:** King

x. **State/Province**: WA/Washington

xi. **Zip/Postal Code**: 98052

xii. **Country**: US



i. **Email Address**: Your valid email address *Note: This is important and needs to be a valid mail

ii. **Confirm Email Address** : <Same as above email address>

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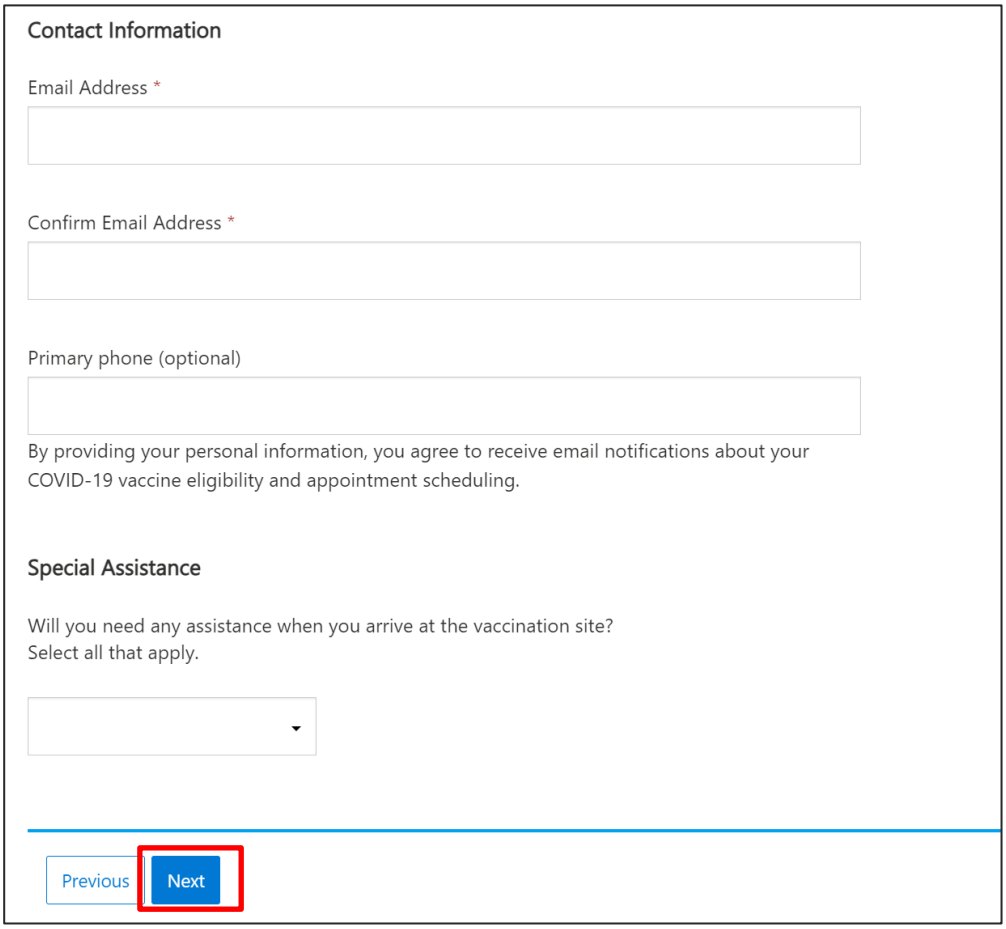
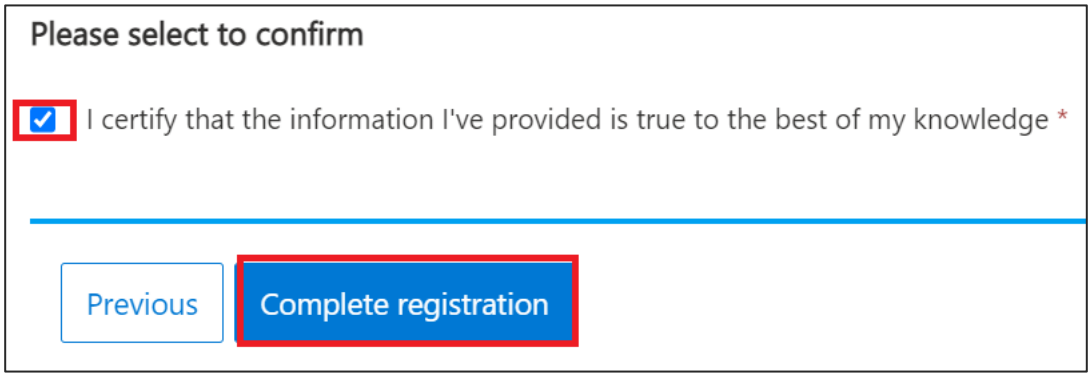
iii. **Primary Phone**: <can be left blank>

iv. **Special Assistance** : <can be left blank>

Click **Next**



11. On the next page, review the summary screen and select the checkbox for **I certify that the information I've provided is true to the best of my knowledge** and click **Complete registration**.



12. You should now see the following screen completing your registration for the vaccine.

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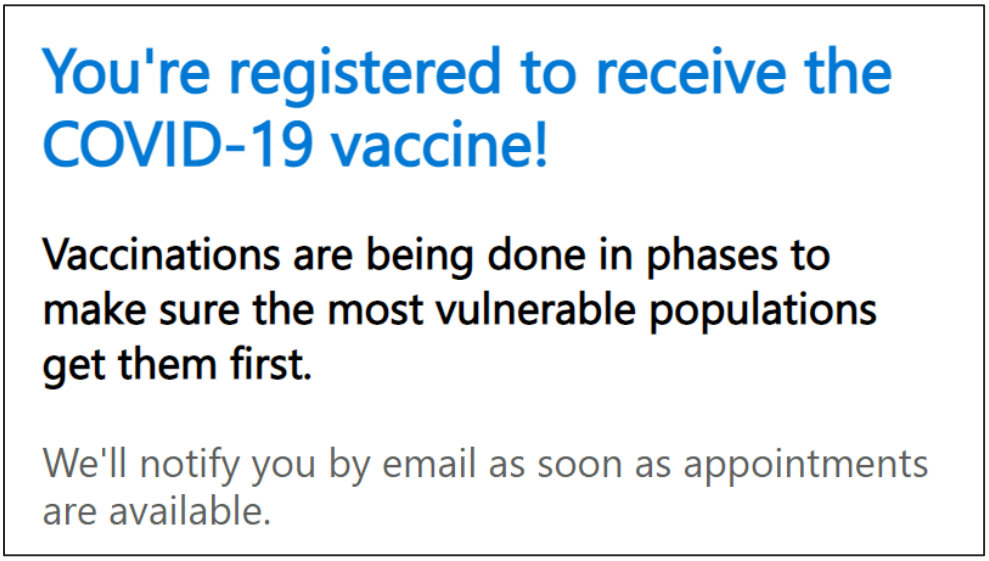

13. **Repeat Steps 10 – 13** to create additional registrations for **two** more residents:
    a. **Resident Two**:
        i. **First Name**: Christopher
        ii. **Last Name**: Reed
        iii. **Race**: Black or African American
        iv. **Ethnicity**: Not Hispanic or Latino
        v. **Gender**: Male
        vi. **Date of Birth**: March 01, 1967
        vii. **Street Address**: 456 23rd Street
        viii. **City**: Redmond
        ix. **County:** King
        x. **State/Province**: WA
        xi. **Zip/Postal Code**: 98052
        xii. **Country**: USA
        xiii. **Email Address**: Your email address
    b. **Resident Three**:
        i. **First Name**: Kayla
        ii. **Last Name**: Lewis
        iii. **Race**: White

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iv. **Ethnicity**: Hispanic or Latino

v. **Gender**: Female

vi. **Date of Birth**: April 01, 1978

vii. **Street Address**: 789 23rd Street

viii. **City**: Redmond

ix. **County:** King

x. **State/Province**: WA

xi. **Zip/Postal Code**: 98052

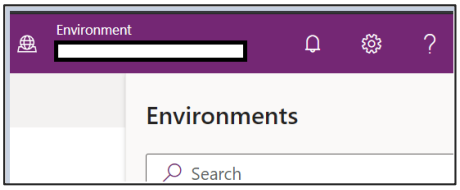
xii. **Country**: USA

xiii. **Email Address**: Your email address

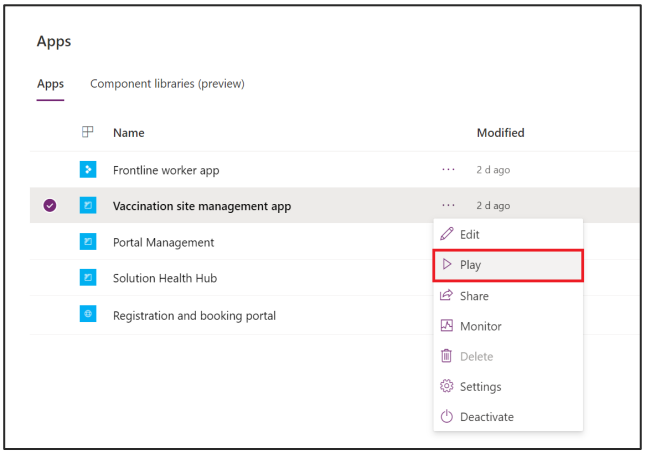
Task 2: Verify Dataverse records created post registration process

In this task, you will assume the persona of a system user/administrator and login to the Dataverse environment and view the records that are created/edited post the registration process.

1. Launch in-private/incognito mode in your browser and navigate to 'make.powerapps.com' using the user credentials shared by your coach.
2. Select your allocated environment from the list of environments in the dropdown



3. Navigate to **Apps** and locate **Vaccination site management app** and click on '…' , then **Play**



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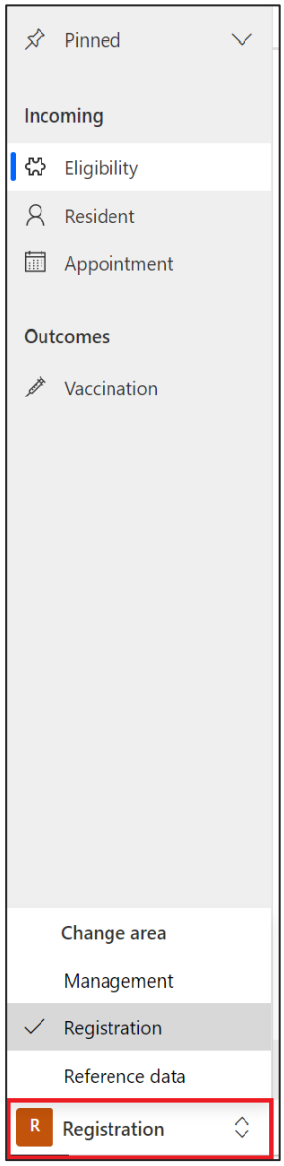
4. The Vaccination Site Management app launches in the next tab. Navigate to **Change area** in the navigation panel and click on it to set to **Registration**



5. The default view will load to **Active Covid Vaccine Eligibilities**. You can select view your **Vaccine Eligibility record** created as a result of your registration steps on the portal.

   Open your Vaccine Eligibility record and click on all tabs highlighted below – **General, Risk Factors** and **Covid History**. You can note the values you entered during the registration process reflect in the **COVID Vaccine Eligibility** record.

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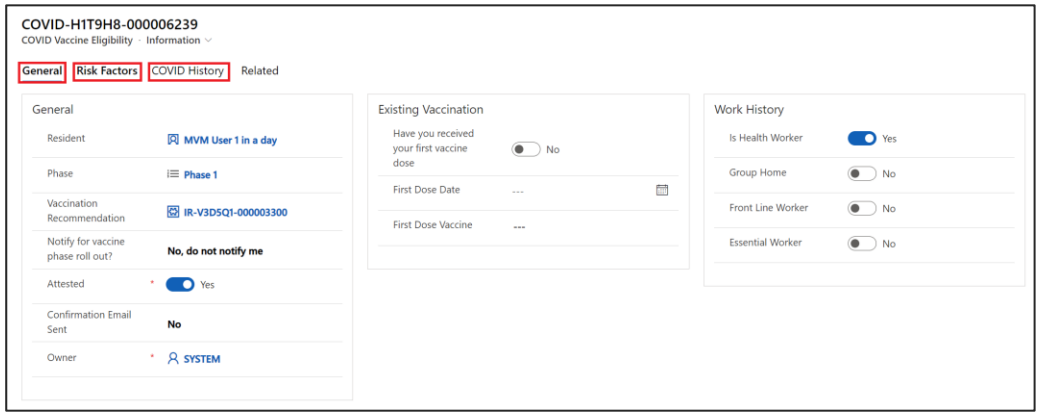
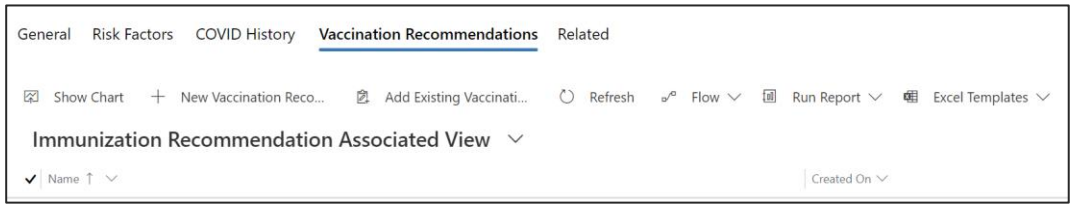


6. Note the 'Phase' showing up on the **COVID Vaccine Eligibility** record. This will be used in the subsequent exercise.

   For example, in the below screenshot, it shows up as **Phase 1.**

7. Now click on **Related** tab and select **Vaccine Recommendations**. You will not see any **Vaccine Recommendation** record tagged to your **COVID Vaccine Eligibility** record. It will get created in the subsequent exercises.



Congratulations! You have now completed your vaccine eligibility process and verified how it manifests in Dataverse. Now that you are eligible, you can move on to book your appointment for the vaccination in the next exercises.

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Exercise 2: Open a Phase to Allow Bookings for Registered Residents

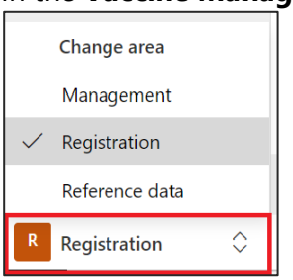
In this exercise, you will assume the persona of a Vaccine Program Administrator who will 'open' a Vaccination Phase. This will trigger notifications to the registered residents against that phase and allow them to book their appointments via a booking link.

Task 1: Open a phase to allow bookings for completed registrations

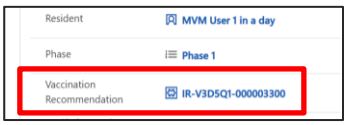
Task 2: Verify Dataverse changes post phase opening

In this task, you will verify what changed on your **COVID Vaccination Eligibility** record after the phase opened. You should see a **Vaccination Recommendation** record auto populated against the **COVID Vaccination Eligibility** record indicating that you can now book an appointment against your registration.

1. In the **Vaccine Management app,** change the area on the application. Set it to **Registration.**



2. Navigate to the same **COVID Vaccination Eligibility** record that you viewed in previous exercise. Note the Immunization Recommendation record updated there now. If it does not appear immediately, give it a few minutes before you click refresh and it should show up on your record.



Congratulations! You have now opened a phase to allow bookings for registered residents and sent invites to them for booking process. Once you receive the mail notification to schedule the vaccine, you can move on to book your appointment for the vaccination in the next exercise.

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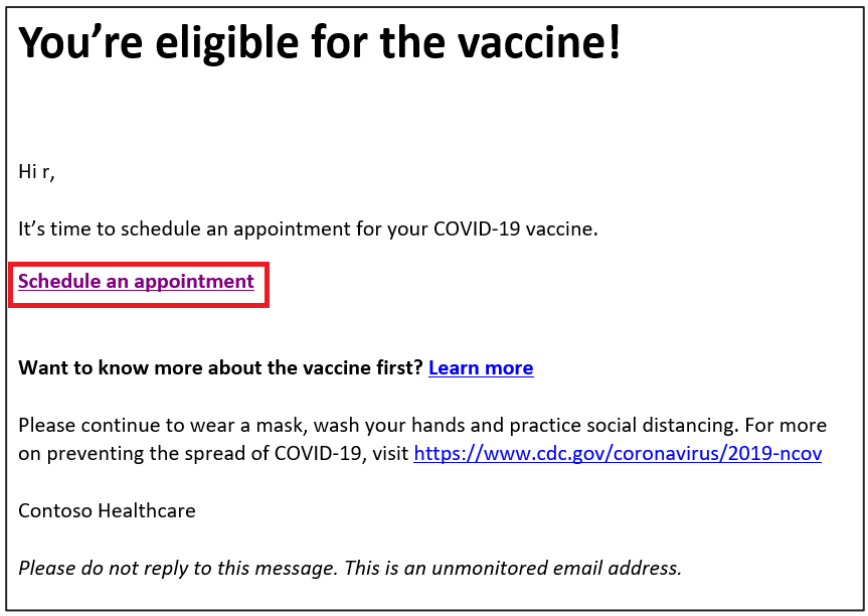
Exercise 3: Book Appointments for Vaccination via Portal

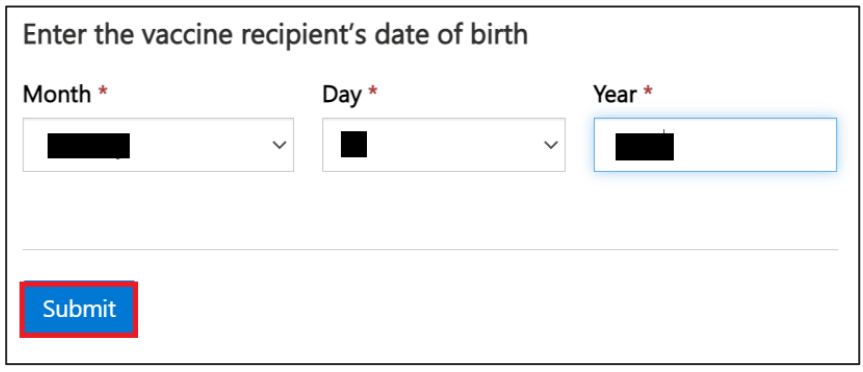
In this exercise, you will assume the persona of a public user who has registered for vaccination via the portal and now wants to book an appointment slot for vaccination. This exercise can be done after the eligibility notification mail has triggered so that you can kick off the booking experience from the Appointment link embedded in the mail.

Task 1: Navigate to portal and book an appointment

1. At the end of exercise 3, you should receive a confirmation email with an appointment link. To launch the booking experience, click on **Schedule Appointment** in the mail



2. This should launch a portal page in your browser. In the form that shows, enter the same date of birth as mentioned in Exercise 1, Task1, Step 10 and click on **Submit.**
Note : It is important that you mention the exact same date as the system validates you against this data.



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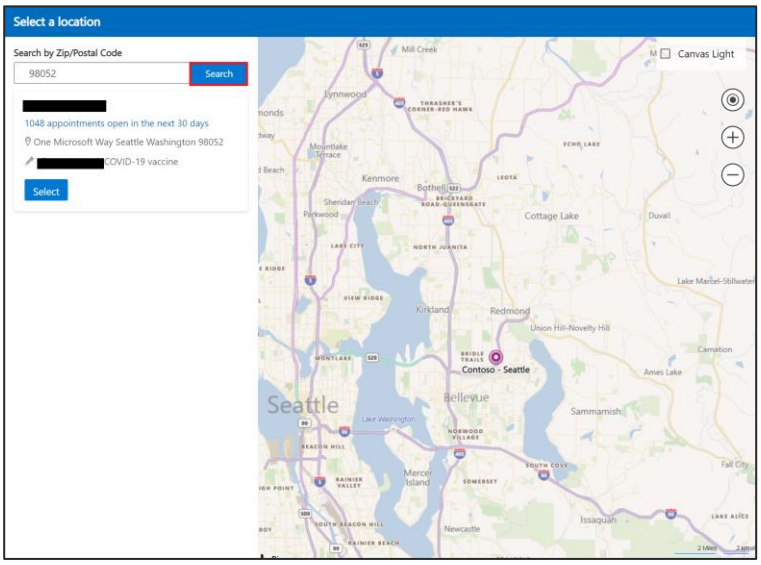
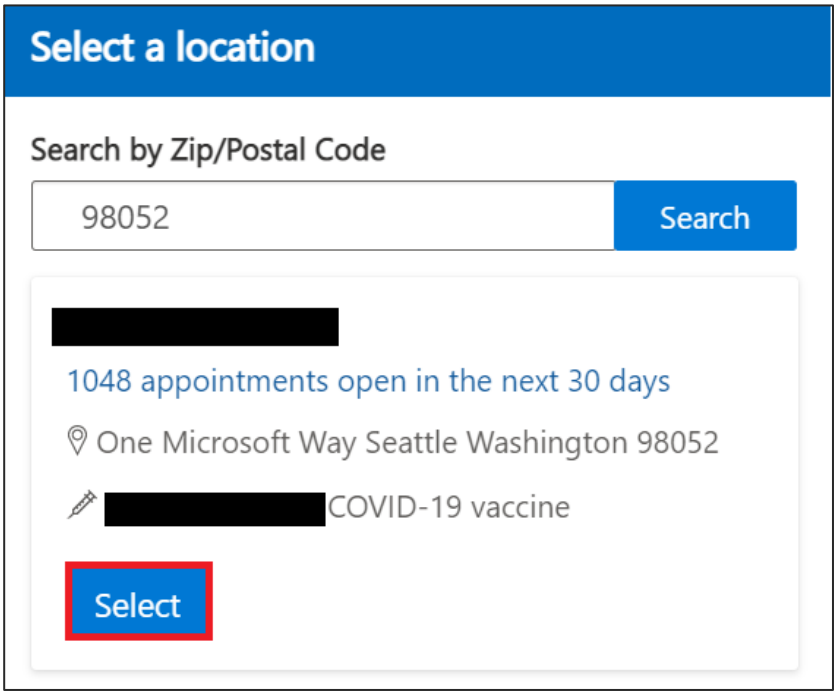
3. Search for the **Zipcode** = 98052 in the search box that appears. It should show up the open slots for booking



4. Once the vaccination site shows up with open slots, click on **Select** to choose your appointment slot.



5. Set the **Date** to today's date and click on **Apply**.

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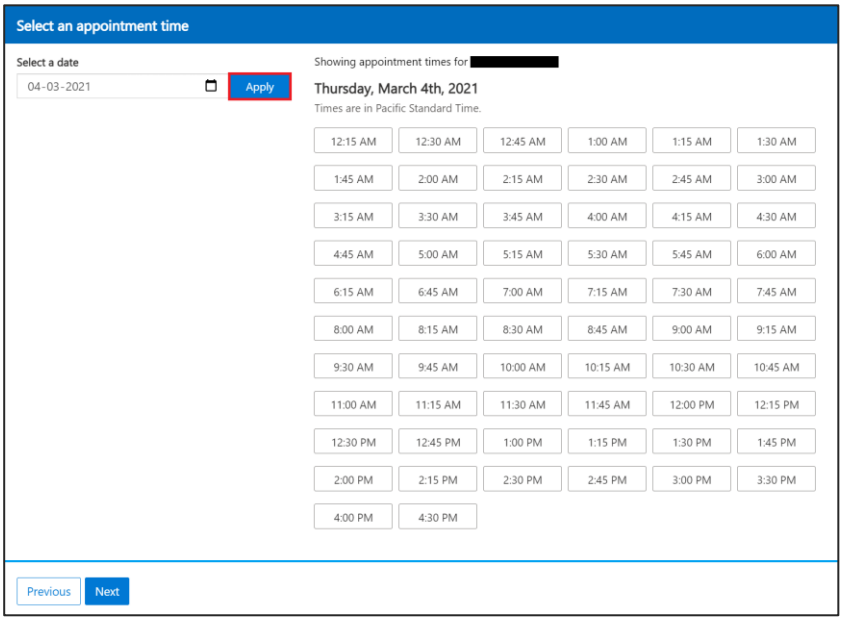
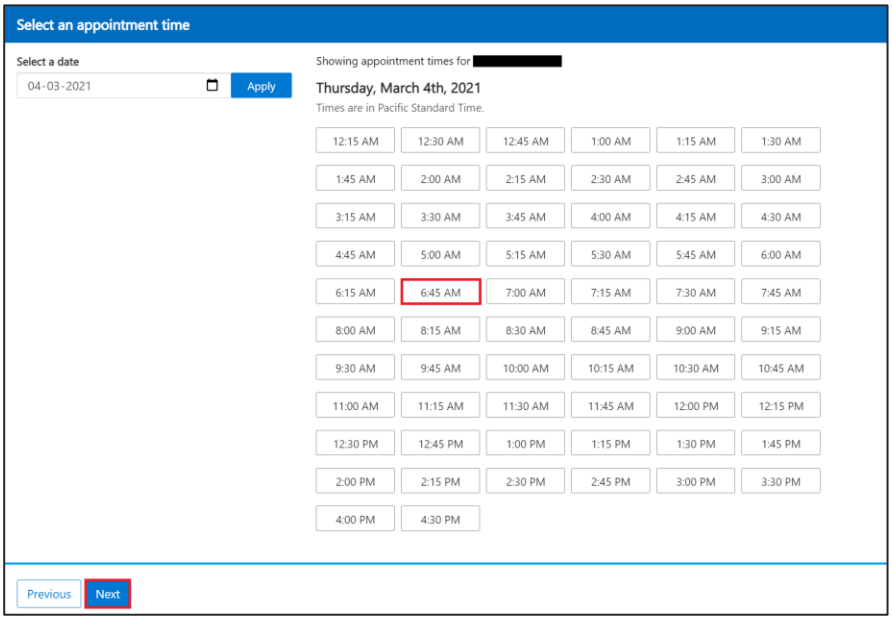


6. Select any available slot to book and click **Next**



7. Verify your details on the next page and click on **Book Appointment**

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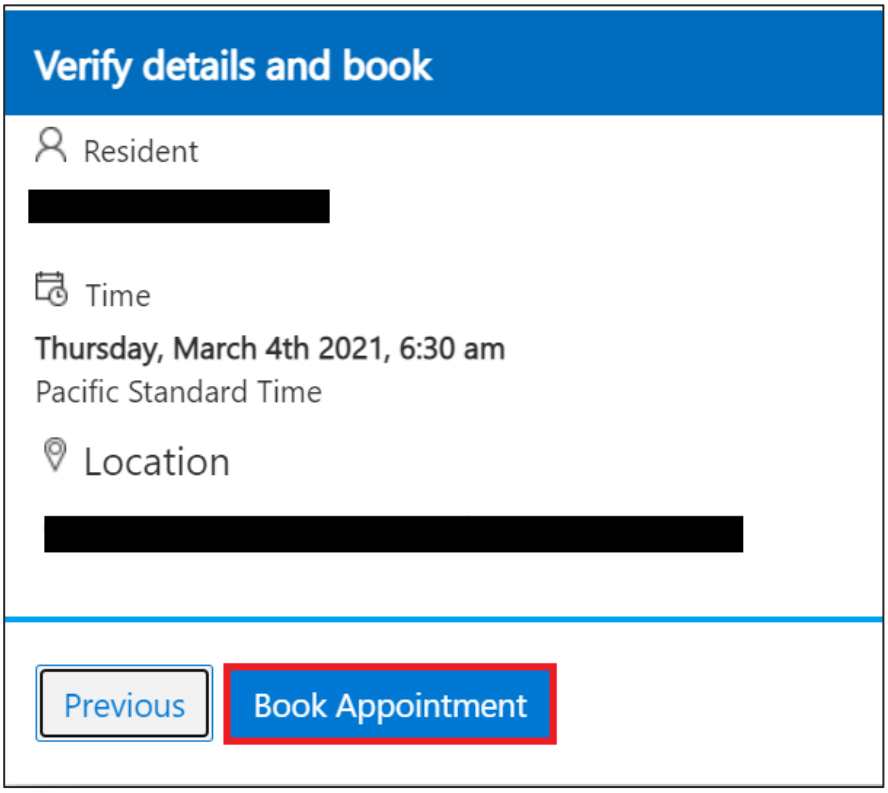

8. View the appointment confirmation and generated QR code

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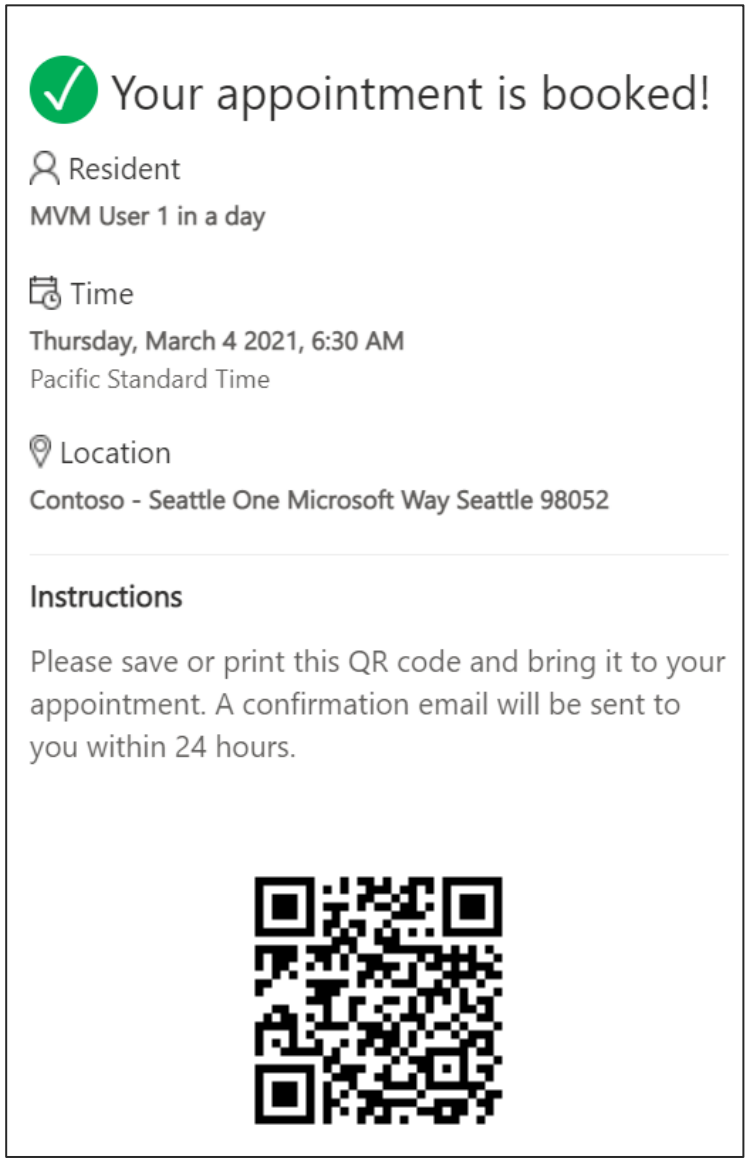

Task 2: Verify Dataverse records created post booking process

In this task, you will assume the persona of a system user and login to the Dataverse environment and view the records that are created/edited post the booking process.

1. Launch in-private/incognito mode in your browser and navigate to 'web.powerapps.com' using the user credentials shared by your coach.
2. Select your allocated environment from the list of environments in the dropdown

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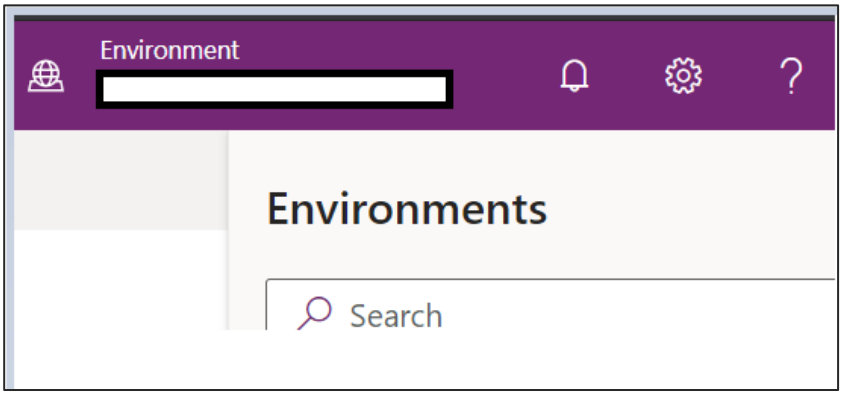
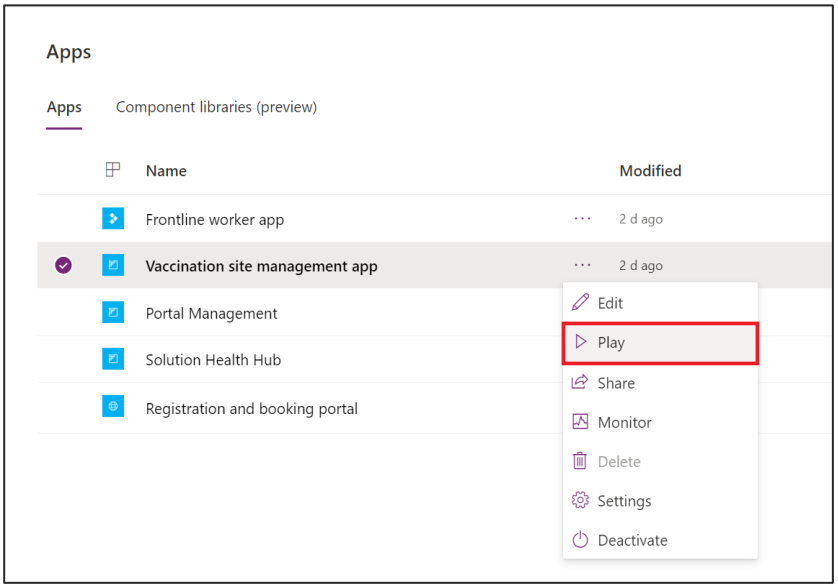


3. Navigate to **Apps** and locate **Vaccination site management app** and click on '...' , then **Play**



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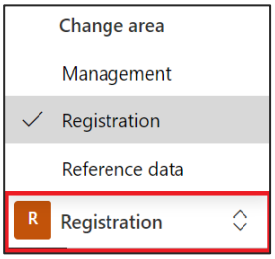
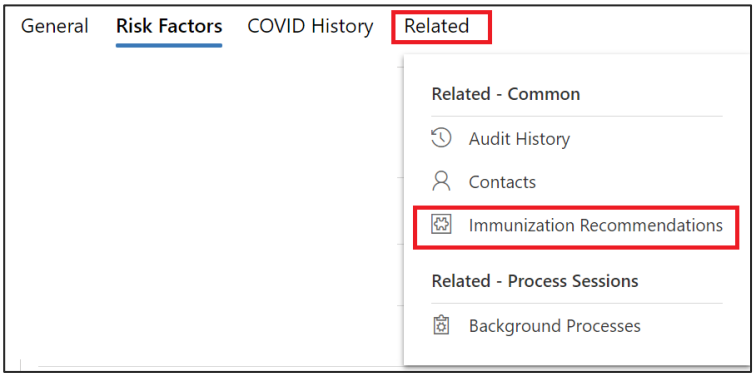
4. The Vaccination Site Management app launches in the next tab. Navigate to **Change area** in the navigation panel and click on it to set to **Registration**



5. Locate the **Covid Vaccine Eligibility** record you viewed in Exercise 1, Task2. Click on **Related** tab and select **Immunization Recommendations**



Select and view the associated **Vaccination Recommendation** record and note an **Active Appointment** field in the record.

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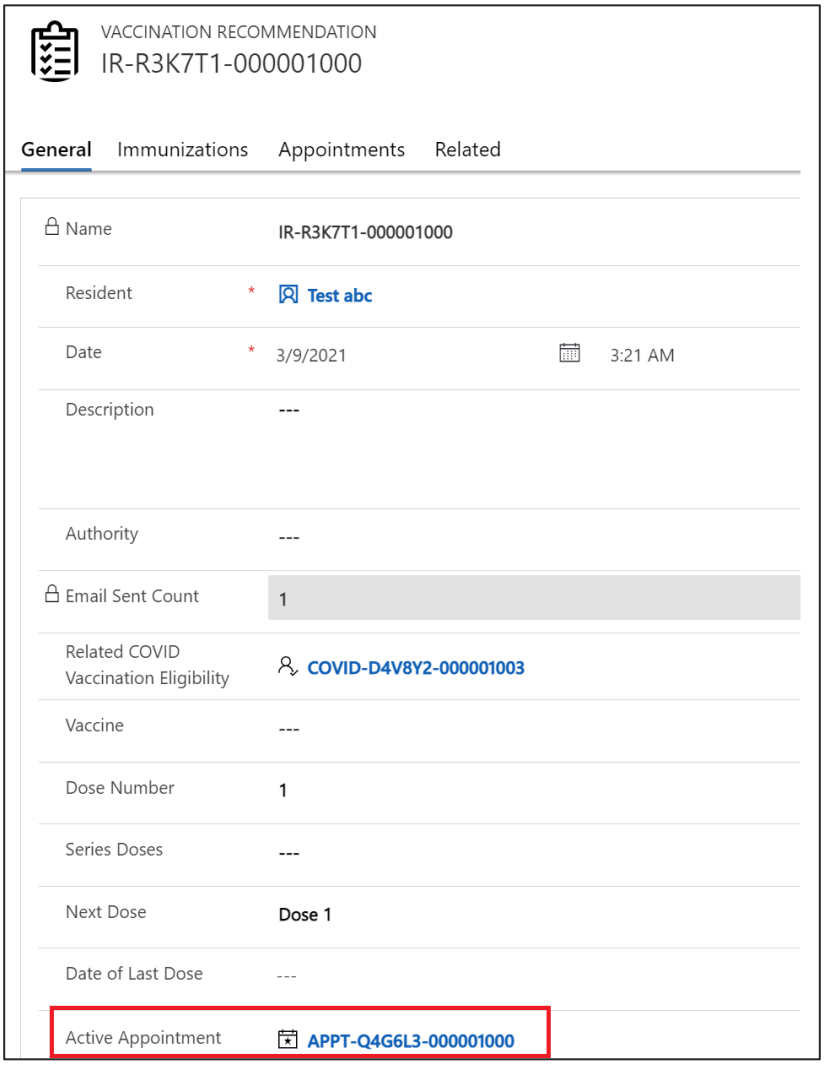

This indicates that you have completed the booking process and have been associated to an **Appointment**. You can also click and open the Appointment record to view the details of the **Slot** and **Time**.

Congratulations! You have booked an appointment for vaccination in the portal and verified how it manifests in Dataverse. This completes the happy path scenarios for Registration and Booking process. Now we will move on to other scenarios supported in Microsoft Vaccination Management.

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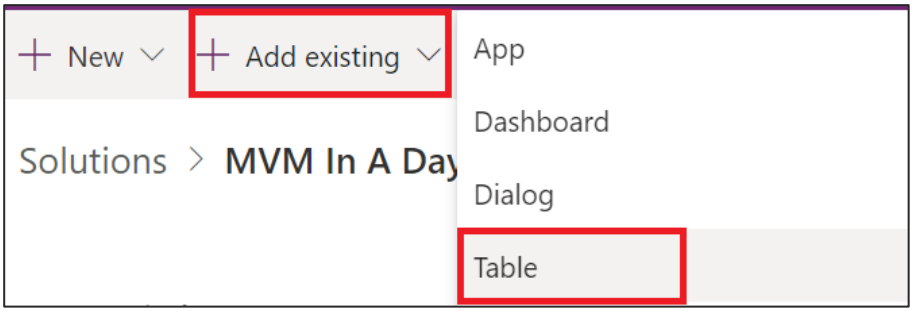
Exercise 4: Configure a New Question in Eligibility Questionnaire without Impacting Eligibility Process

In this exercise, you will be required to create a new question to the eligibility questionairre. The question is required to capture data from the user and save it in the system but does not really impact the overall eligibility computation workflow. Hence, you would just be making changes to the portal to reflect a new question in the existing questionnaire.

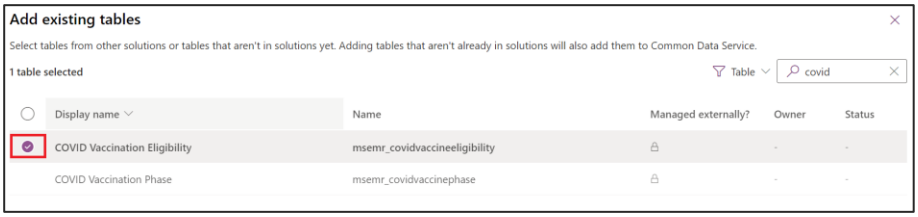
Task 1: Customize existing components and add new components in a solution

In this task, you will re-use the existing solution that you created in Lab1 and add a few components that will be customized to reflect the new question on the portal

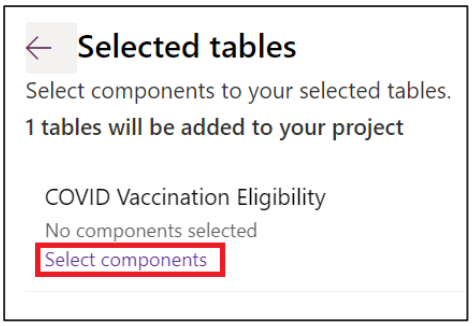
1. Navigate to the solution you created in Lab1 called **MVM in a Day** and click on **+Add Existing** and select **Table**



2. In the list that shows up, search for **Covid Vaccination Eligibility** table and click on **Next**



3. Once the table is added, click on **Select Components**



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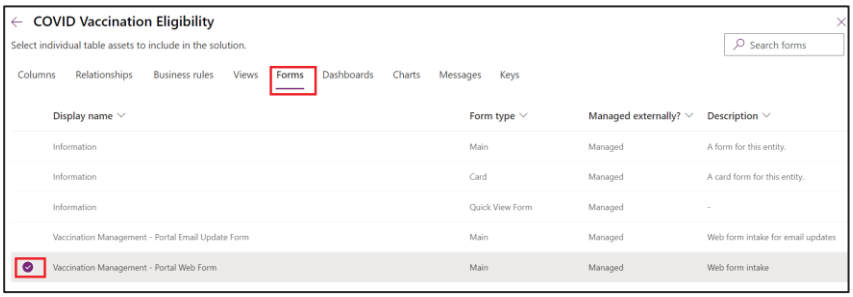
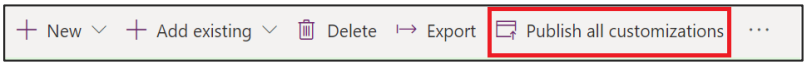
4. In the list that appears, navigate to **Forms** tab and click checkbox for **Vaccination Management – Portal Web Form** in **Forms** tab and click on **Add**



5. Click on **Publish All Customizations**

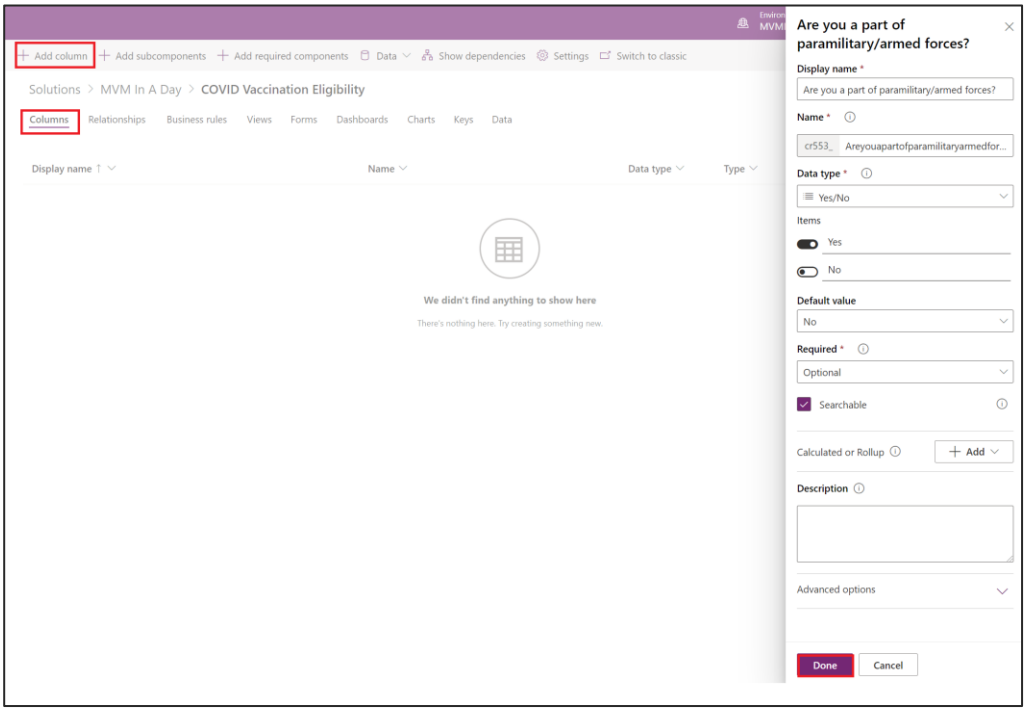


6. Add new column with below values -

   Column Name : Are you a part of Paramilitary/Armed Forces

   Type: Yes/No

   Click on **Done.**



7. Once column is added, click on **Save Table**

8. Now navigate to **Forms** tab and select the **Vaccination Management – Portal Web Form**

9. Once the form opens up, navigate to **Table Columns** in the left navigation and click on **Work History**

10. Click on + **Form Field** and select the newly created column called **Are you a part of paramilitary/armed forces**

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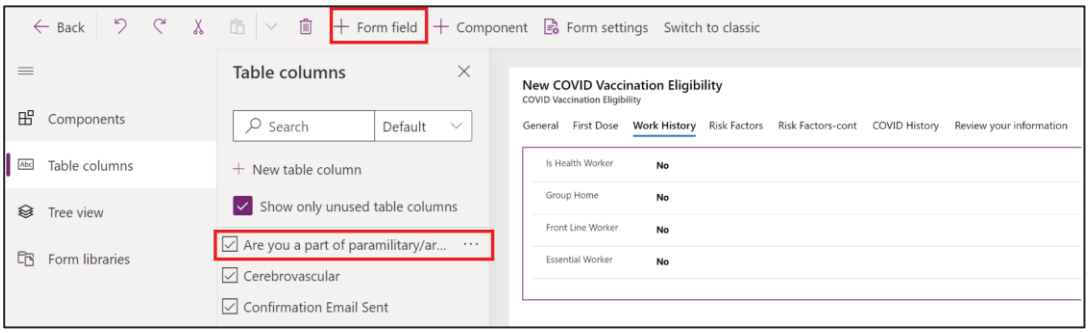
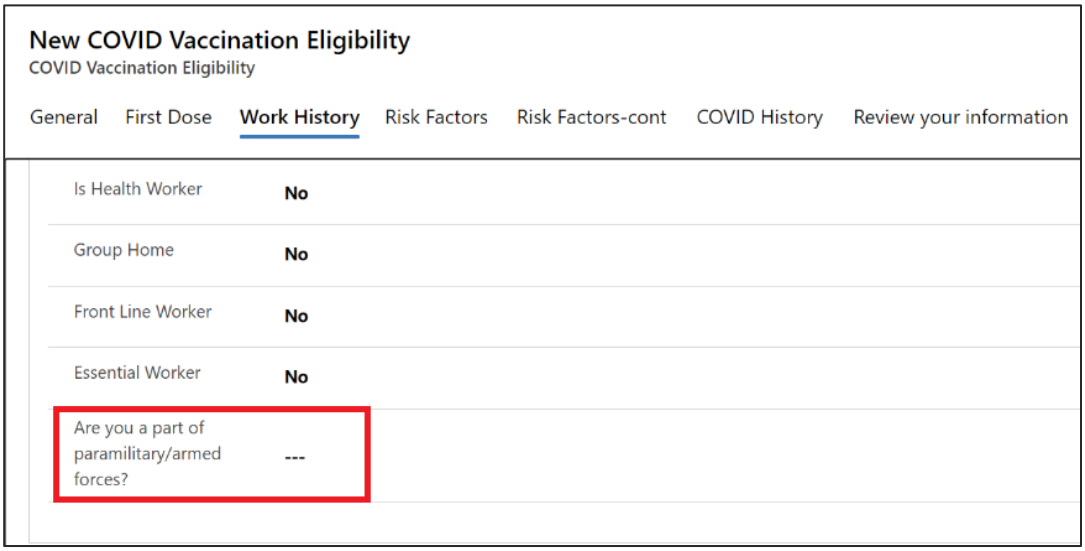


11. Note the new column show up on the form now



12. Now click on **Save** and then **Publish** to save the changes and then click **Back** to exit

13. Get back to solution page and click on **Publish All Customizations**

Task 2: Restart portal and verify your changes

1. In the same browser where you have logged in to the lab environment, open a new tab and navigate to **https://admin.powerplatform.microsoft.com/**
2. In the navigation pane, click on **Resources** dropdown and then **Portals**

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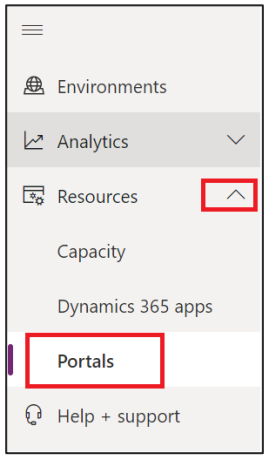
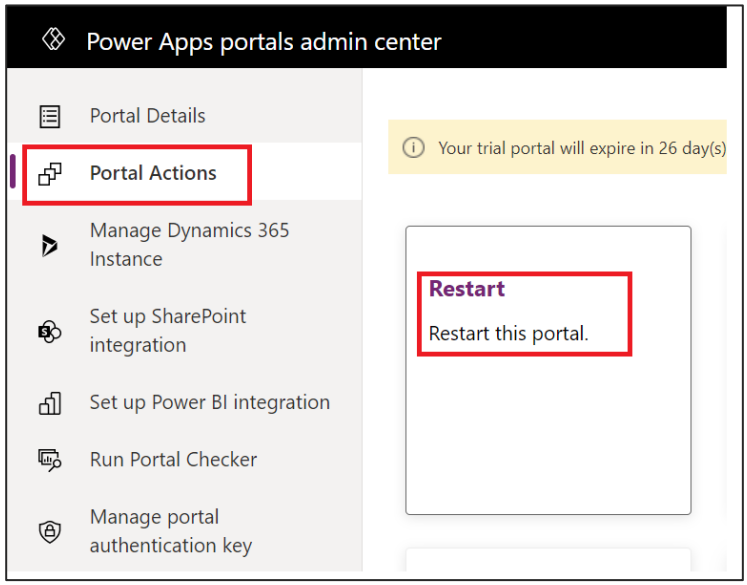


3. In the Search box, search for <Your allocated environment Name> and you can find the **Registration Portal** show up as a search result. Click on **...** and then **Manage**

4. This should launch the Portal Admin Center in a new tab. In the Admin Center, click on **Portal Actions** and then **Restart Portal**



5. Once the portal restarts, navigate back to your portal page and follow the process of checking eligibility as done in Exercise1. Follow through till you reach on the Step 2 of Eligibility questionnaire to verify your new question now shows up in the portal

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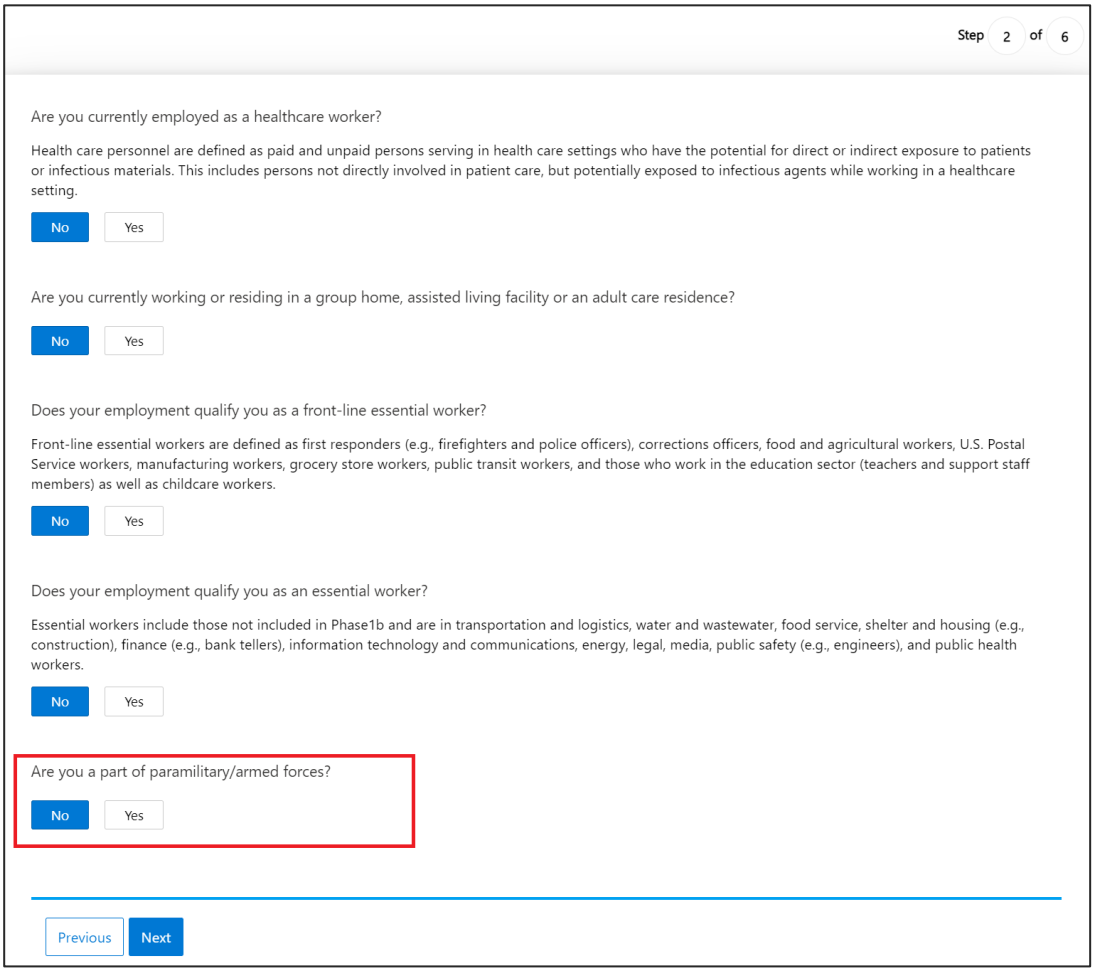

Congratulations! You have now understood how to add a new question to the Eligibility questionnaire and can track user responses in a Dataverse record.

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Bonus Exercise 1: Configure a New Eligibility Process

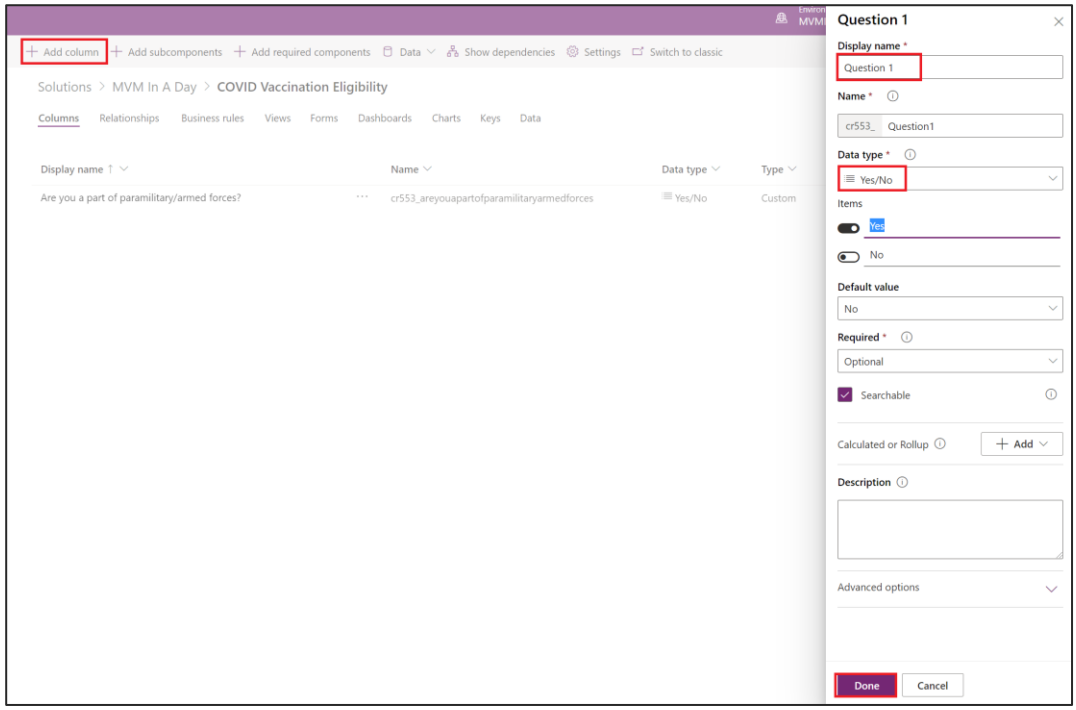
In this exercise, you will mimic onboarding the MVM solution for a new locale/geo that has different COVID vaccination eligibility rules. In that case, you would be required to override most of the existing portal behaviour and replace it with new rules. You would also be required to edit the overall eligibility workflow that evaluates if a person is eligible according to the configured rules so that the new set of rules are honoured during eligibility computation.

Task 1: Customize existing components and add new components in a solution

In this task, you will re-use the existing solution that you created in Lab1 and add a few components that will be customized to reflect the new question on the portal

1. Navigate to the solution you created in Lab1 called **MVM in a Day** and search for **Covid Vaccination Eligibility** table and click on it.

2. Once the table opens, click on **Add column** and set the following details -
   Display Name : Question 1
   Data type : Yes/No
   Click on **Done**



3. Once column is added, click on **Save Table.**

4. Repeat steps 2 to 3 for adding another column with following details –

   Display Name : Question 2

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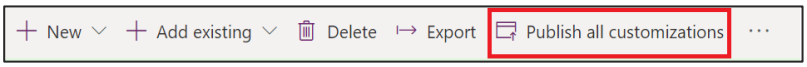
Data type : Yes/No

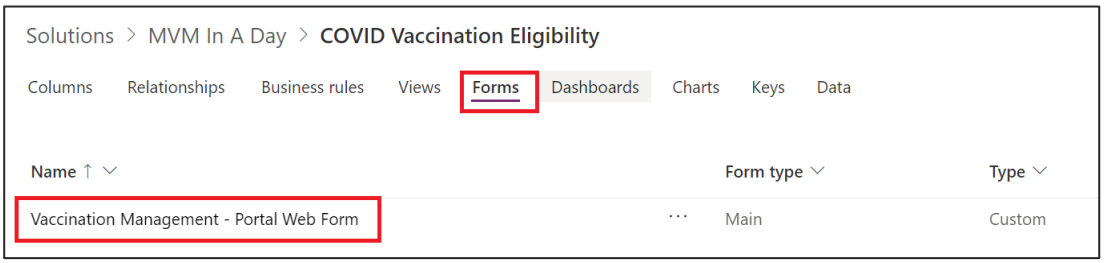
5. This is how your table **Columns** should look like now.

6. Click on solution name **MVM In A Day** to navigate back and **Publish all customizations.**

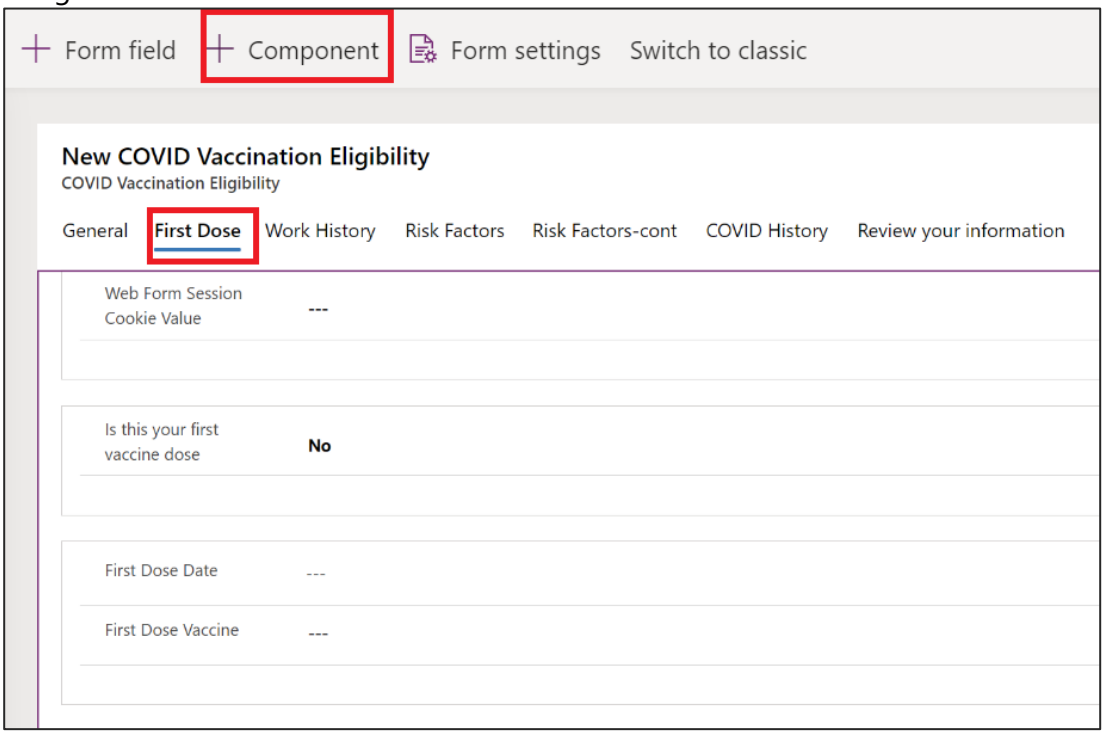


7. Once published, click again on **Covid Vaccination Eligibility** table in the solution

8. In the list that appears, navigate to **Forms** tab and click **Vaccination Management – Portal Web Form**



9. This should launch the form for editing. Now click on **First Dose** tab and then **+Component** in the navigation bar.



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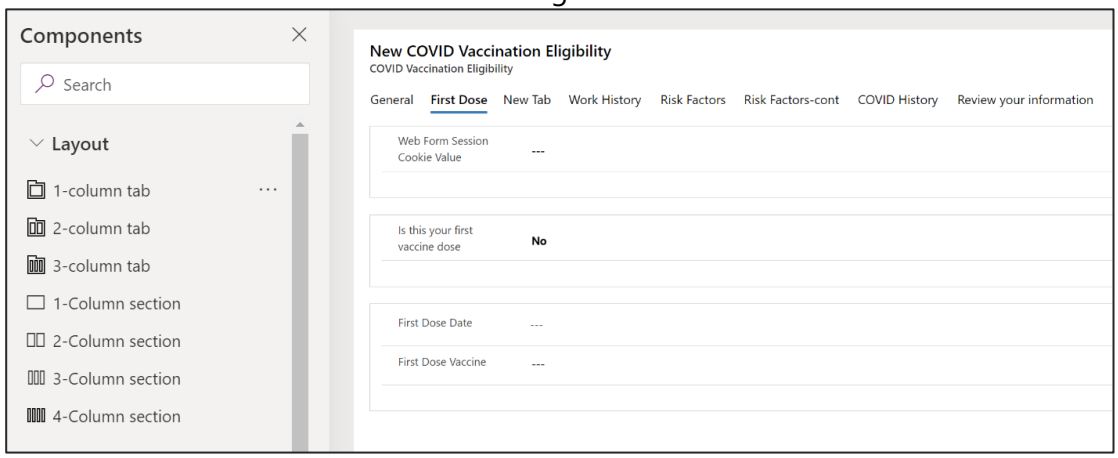
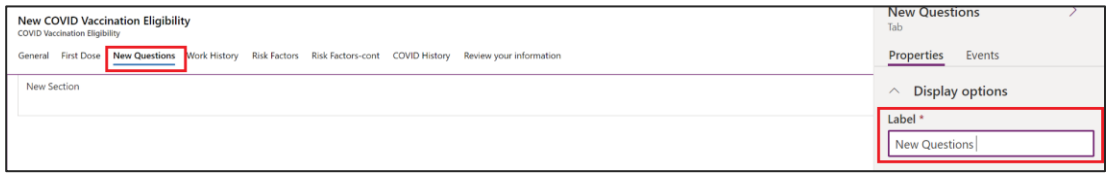
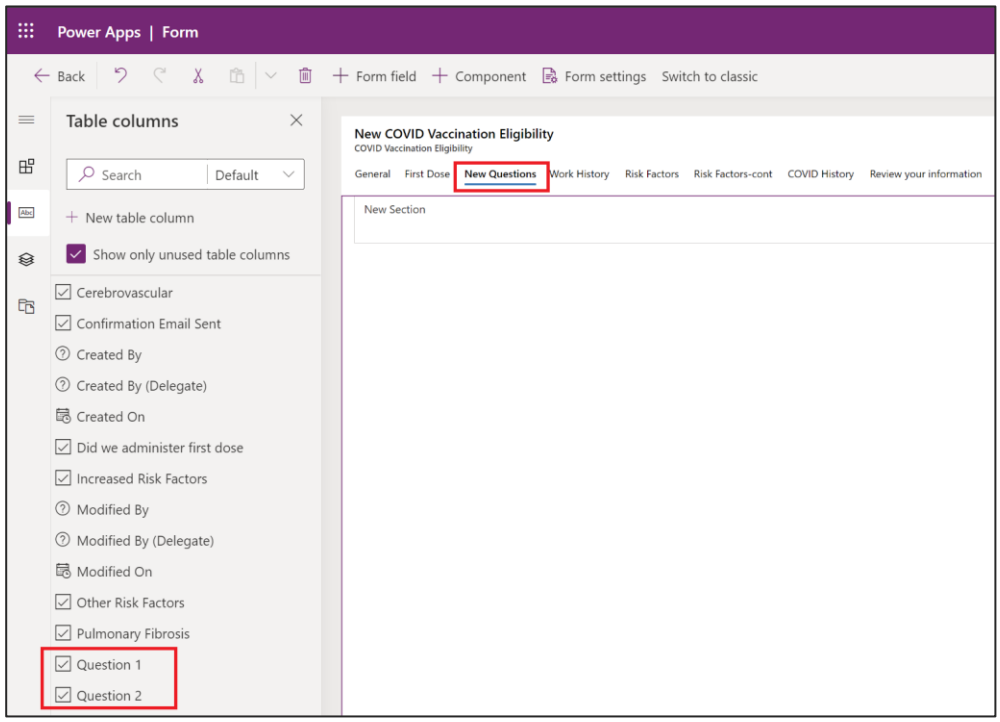
10. Now click **1-column tab** from the left navigation and see it reflect on the form as shown



11. Now click on the **New Tab** and update the **Label** to "New Questions"



12. Now click on **+Form Field** in the navigation bar and click on **Question1** and **Question2** to add them to the newly created tab



13. Once added, here is how your form tab will look like -

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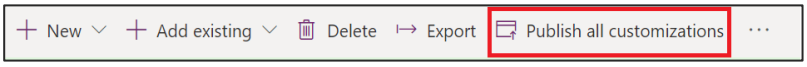
14. Click on **Save** and then **Publish**
15. Click on **Back** to exit from the form. Then click on solution name and **Publish all customizations**

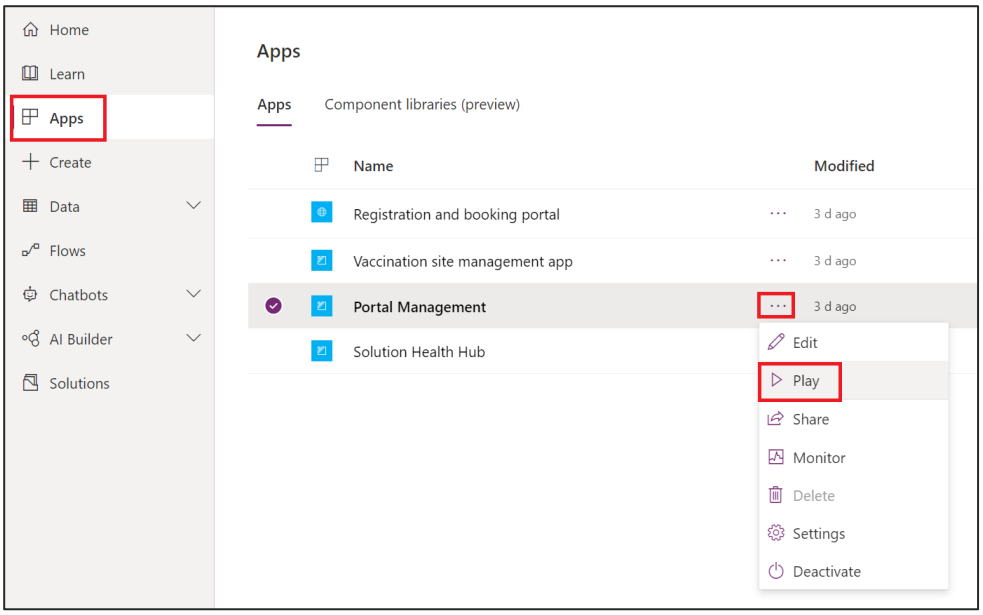


Task 2: Edit portal webform steps to show your page

In this task, you will edit the portal settings to reflect a new page with your questions. While you move from one page to the other on the portal, you are essentially navigating from one tab to the other on the form. To achieve this, each tab on the form is bound as a web form step on the portal. Introducing a new page requires changing the flow of the tabs and injecting a web form step in between. And that is exactly what we would do in this task. The original form step sequence is **Welcome** -> **WorkHistory** followed by other tabs. You will alter the sequence to **Welcome** -> **New Questions** -> **WorkHistory** followed by other tabs.

1. Launch **web.powerapps.com** using your user credentials and ensure the **Environment** is showing up correctly.

2. Click on **Apps** and locate **Portal Management** app, click on **...** and **Play**



3. This will launch the **Portal Management** app in another tab.

4. In the **Portal Management** app, click on **Web Forms** in the left navigation bar

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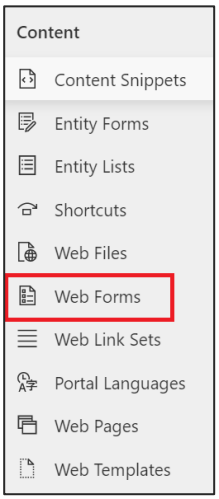
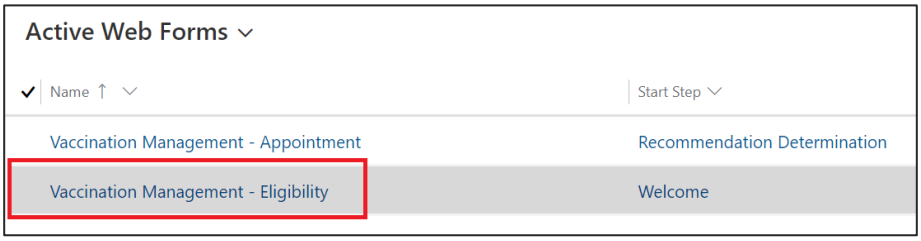
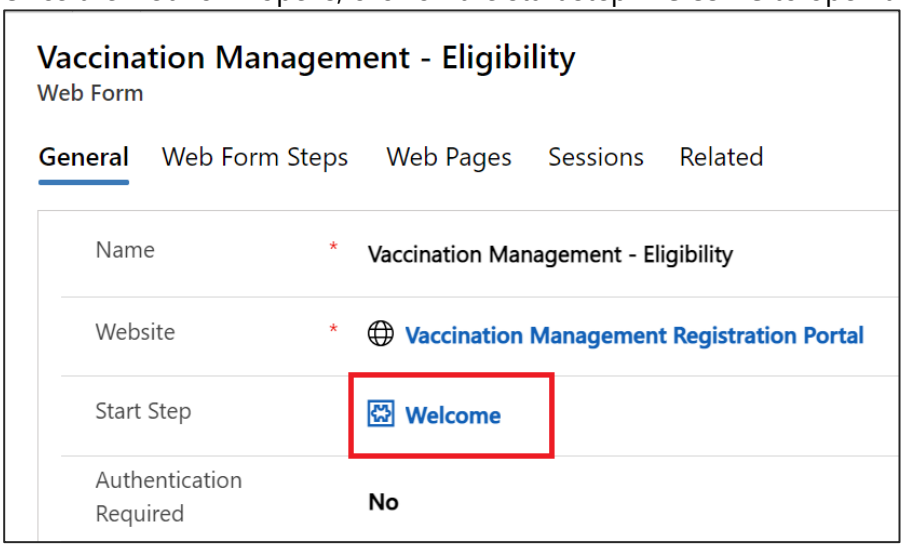


5. In the list that appears, click on **Vaccination Management – Eligibility**



6. Once the web form opens, click on the start step **Welcome** to open the web form step



7. Web form step should open up. In the start step value that shows **Work History**,click on **X** to clear the value and then click on search icon to create a new Web form step.

8. Click on **New Web Form Step** to launch a create form for web form step

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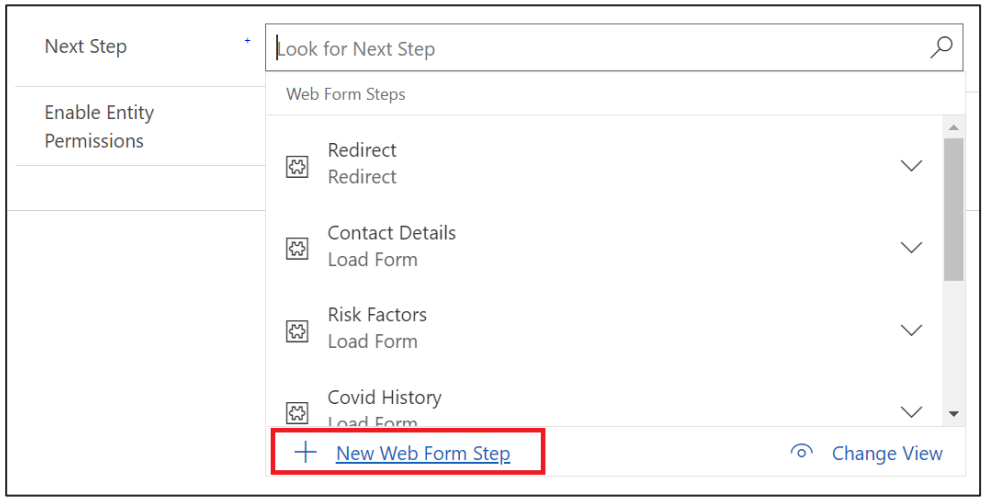


9. Set following values in the Web Form Step and click **on Save**

Name : **New Questions**

Web Form : **Vaccination Management – Eligibility**

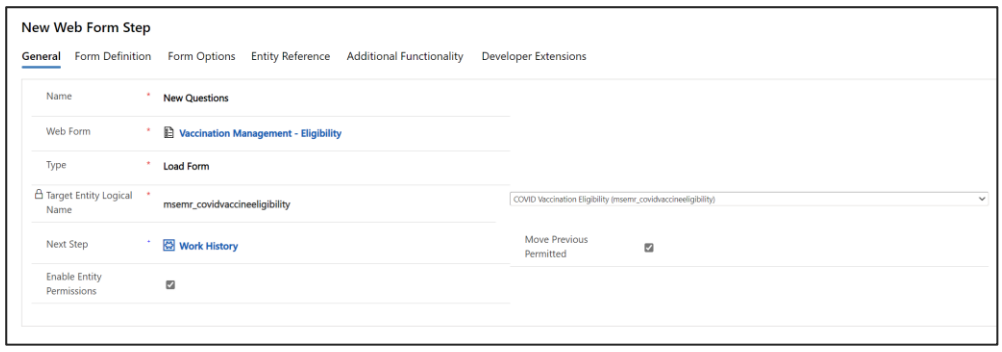
Type : **Load Form**

Target Entity Logical Name : **COVID Vaccination Eligibility**

Next Step : **Work History**

Move Previous Permitted : **Yes**

Enable Entity Permissions : **Yes**



10. Now navigate to **Form Definition** tab on the form and set the following values and then click on **Save and Close**

Form Name : **Vaccination Management – Portal Web Form**

Tab Name : **New Questions**

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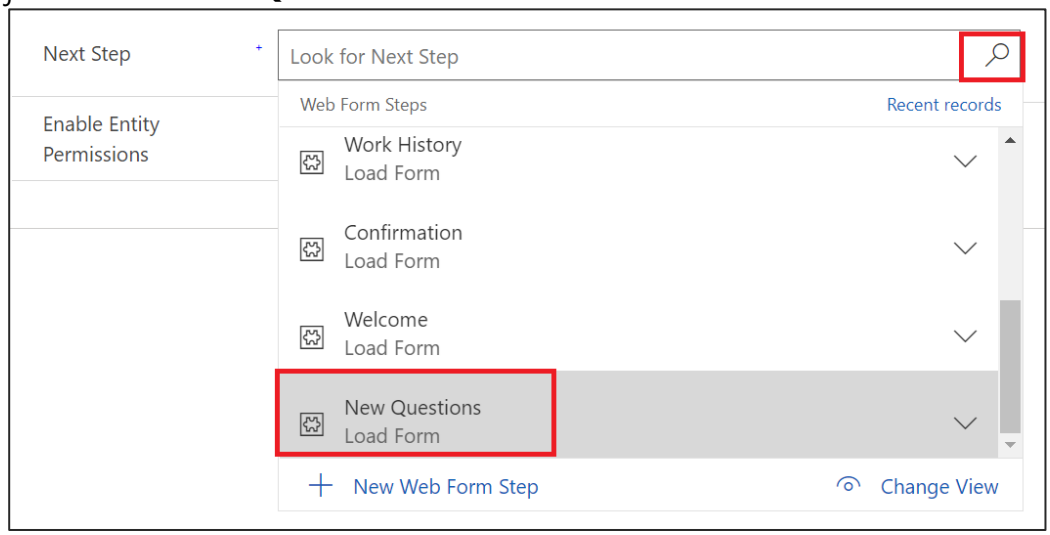
11. You will land on the **Welcome** web form step again. Now set the Next step to the web form that you just created – **New Questions**

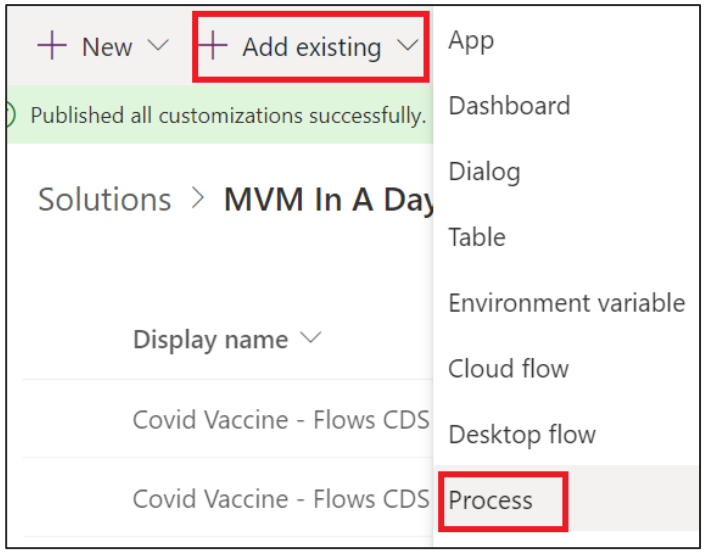


12. Once done, **Save** the form and close.

Task 3: Edit workflow to change eligibility logic

In this task you will edit the current eligibility logic to take into account the responses to your new questions and compute eligibility accordingly.

1. Navigate back to your **MVM in a Day** solution and click on **+Add existing** and select **Process**



2. Search for 'Eligibility Phase'. Select the process named **Vaccination – Eligibility Phase Determination** and click on **Add**

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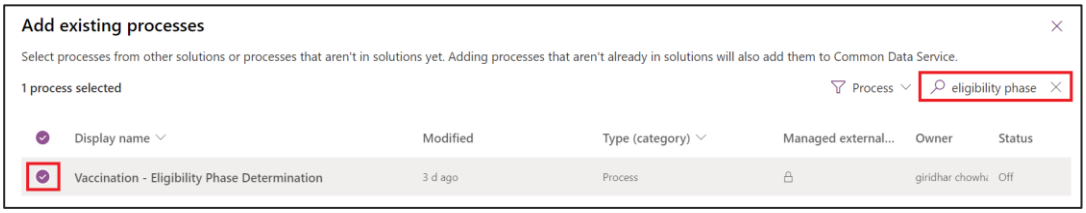
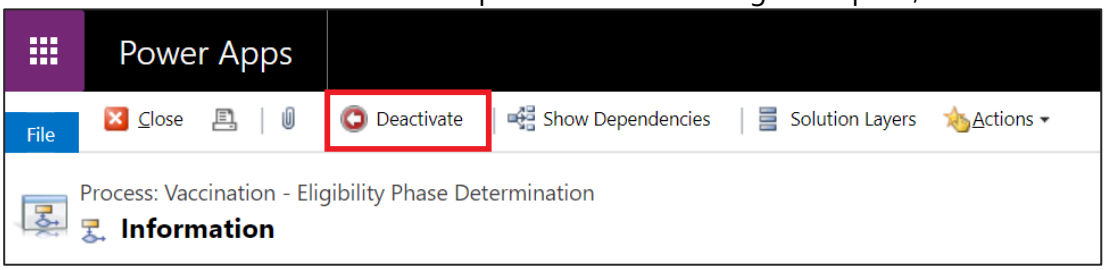
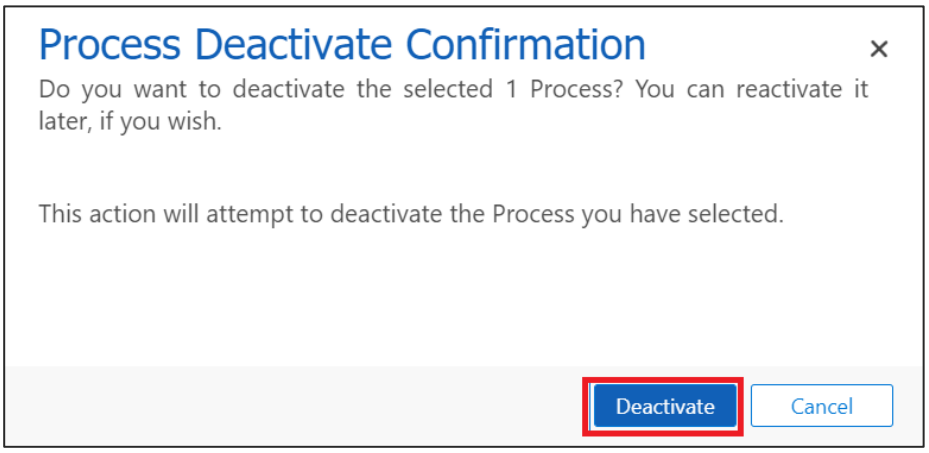


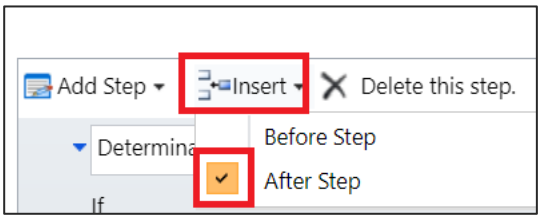
3. Once added, click on the process **Vaccination – Eligibility Phase Determination.** This will launch the process designer in a new tab.
4. Click on **Deactivate** button in the top ribbon. In the dialog that opens, click on **Deactivate**.





Now the process designer will open with the editable version of the Process.

5. In the process designer, click on **Insert** and then select **After Step**. If it is pre-selected, then simply move to the next step.



6. Then click on the **Otherwise if** written on the step that says **Phase 2**. This will highlight the whole conditional step as shown below.

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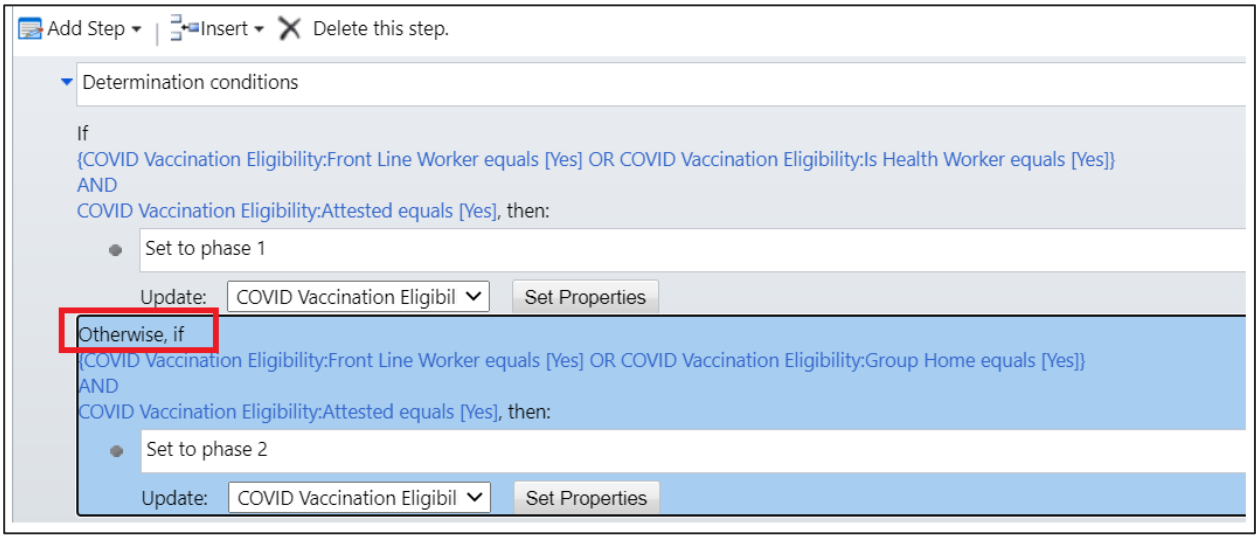
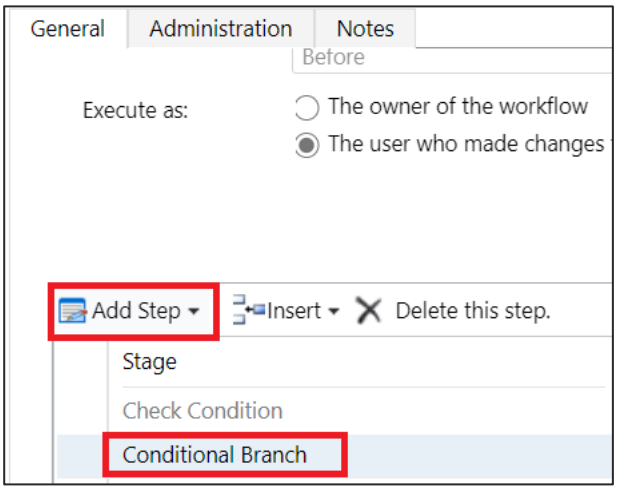
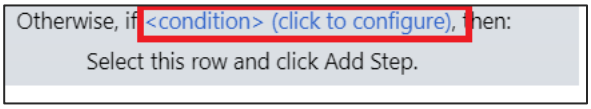


7. Once the step is selected, click on **Add Step -> Conditional Branch.** This will insert a new step post the selected conditional step.



8. Note the step appear in the workflow as shown below. Click on **<condition>(click to configure)**



9. In the dialog box that opens, begin selecting the first condition. Set Primary entity dropdown to **COVID Vaccination Eligibility**

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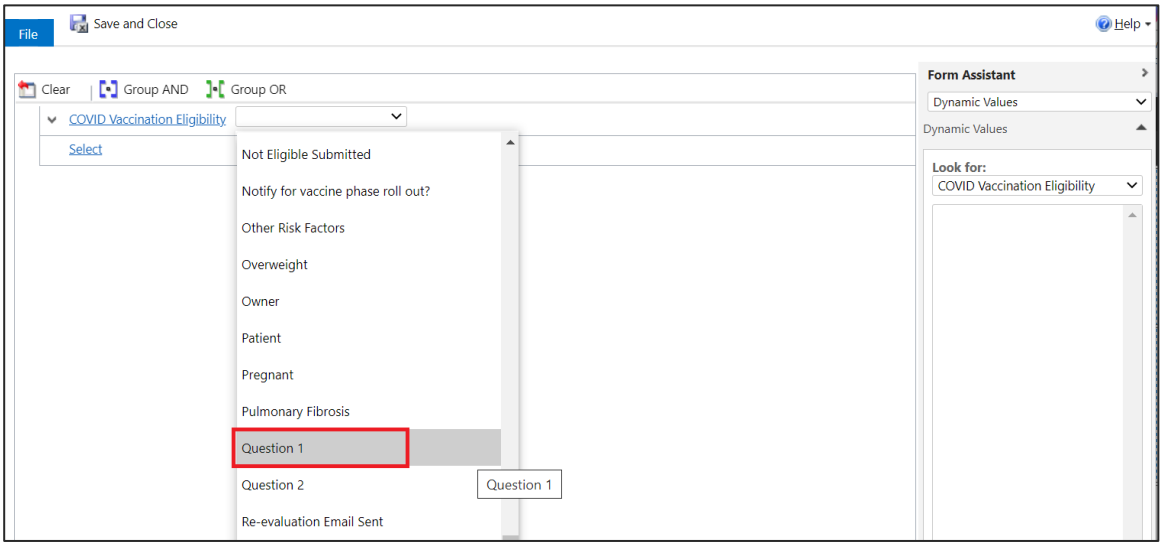
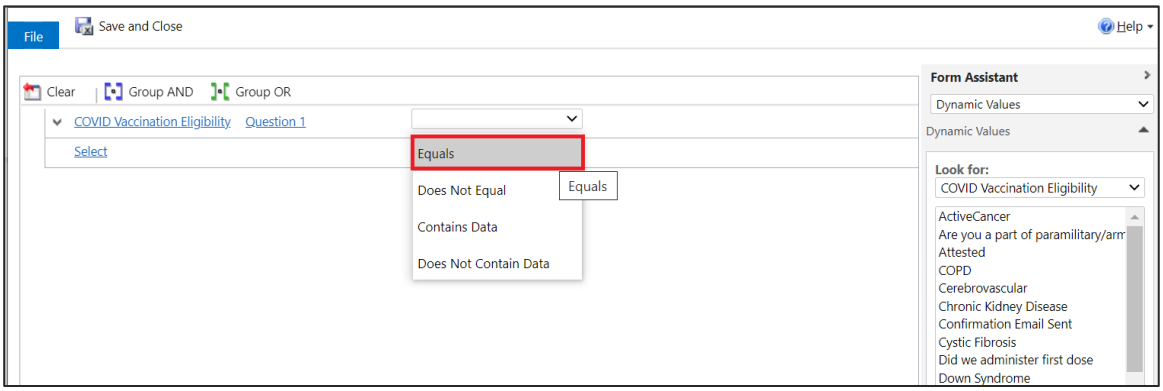
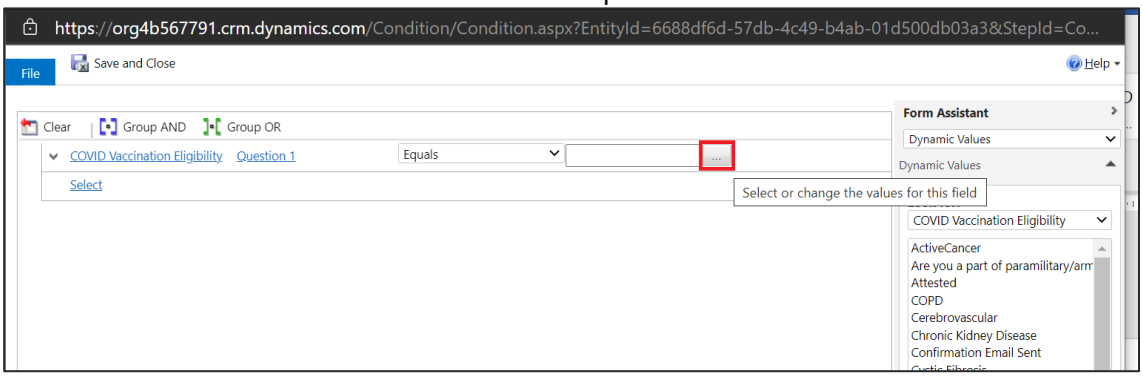
10. Now click on the next dropdown and select **Question 1** from the list.



11. Add the following conditions and select **Equals.**



12. Now click on the **...** to select values from the options shown.



13. In the dialog that pops up, select **Yes**, and then click on **>>>** and then on **OK.**

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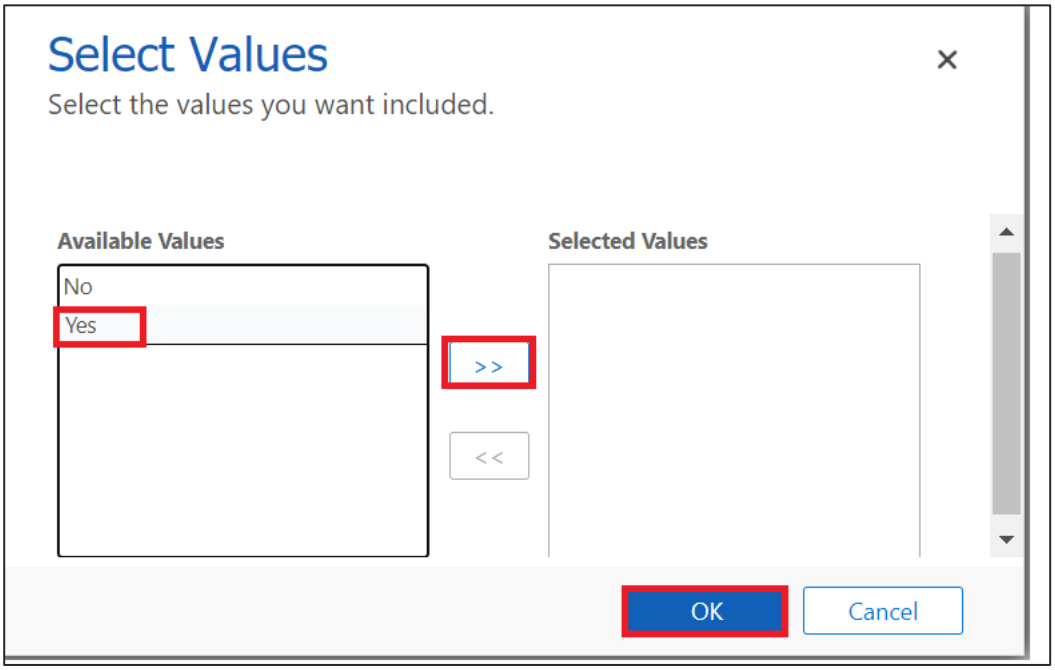
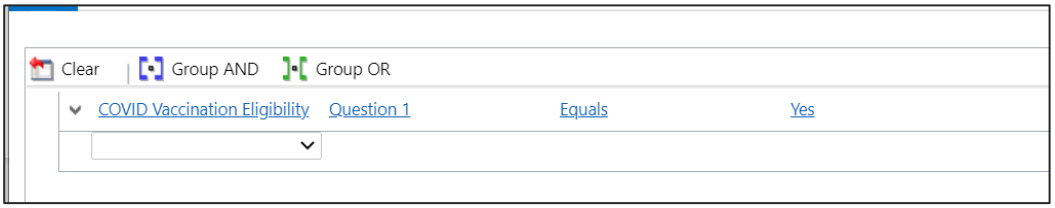
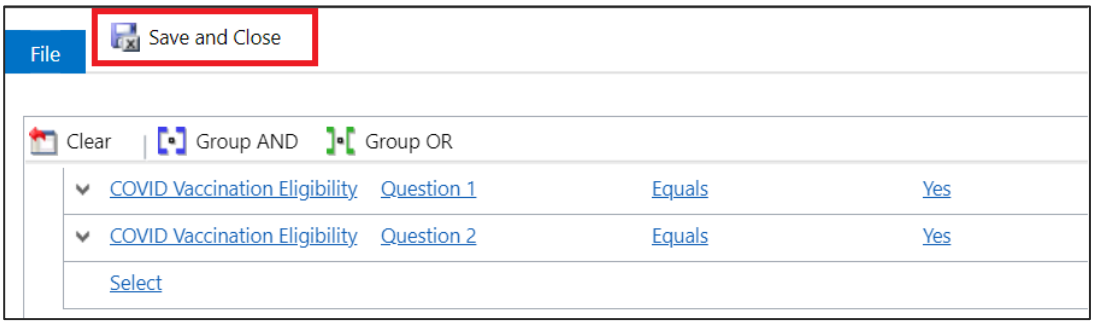


14. This is how your workflow step will look like now.



15. Repeat steps 9-13 for **Question 2**. This is how your workflow step will look like after you are done. Click on **Save and Close**



16. Once the dialog closes, your workflow designer should look like below screenshot. Now select the row shown below and click on it. Then click on **Add step -> Update record.**

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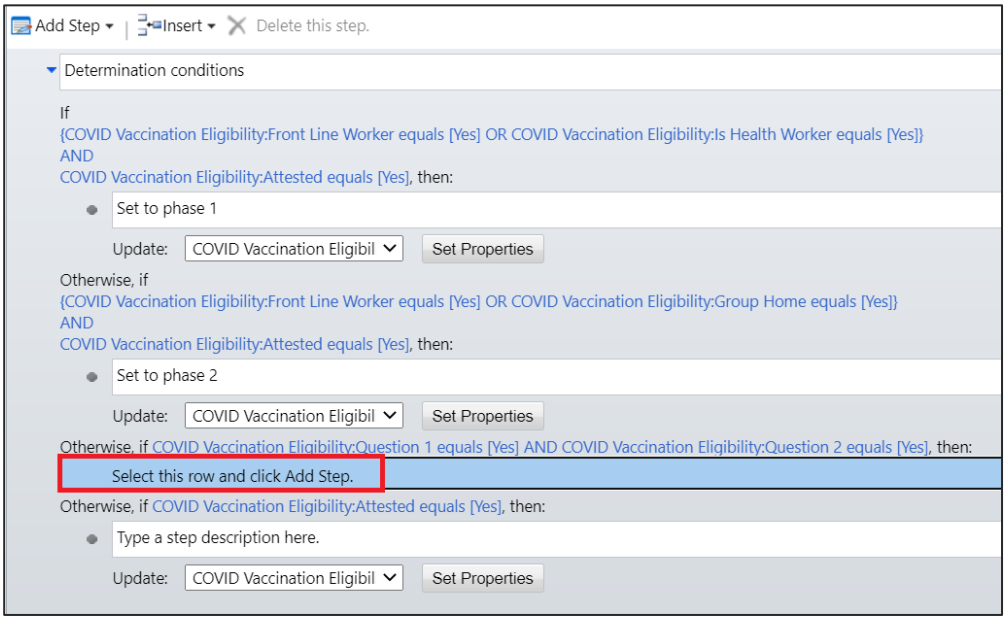
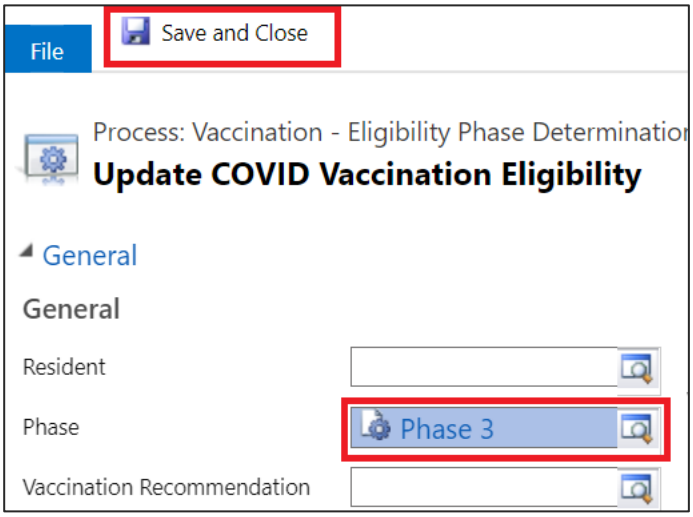


17. In the window that opens, set the **Phase** to 'Phase 3' as shown below and click **Save and Close**



18. This is how your final workflow looks like. Click **Save** and then click **Activate.**

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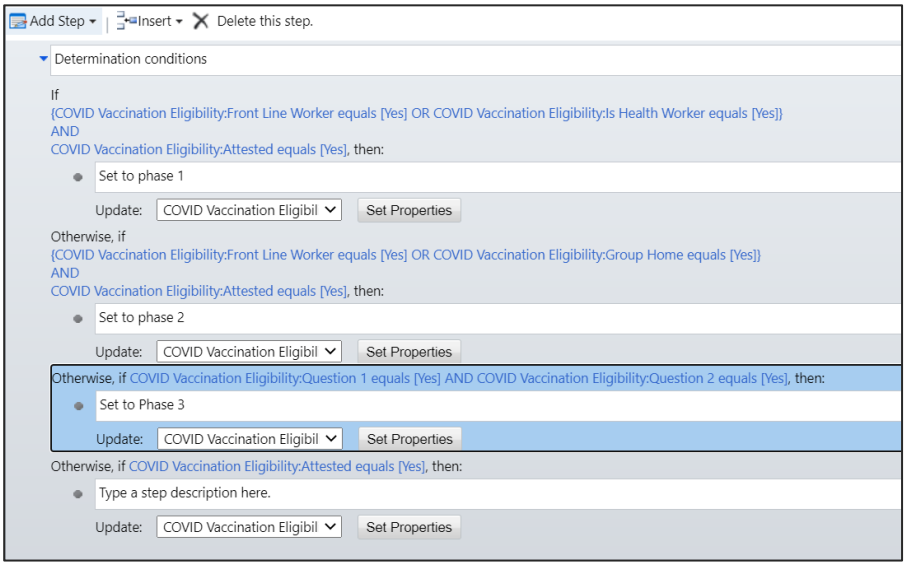
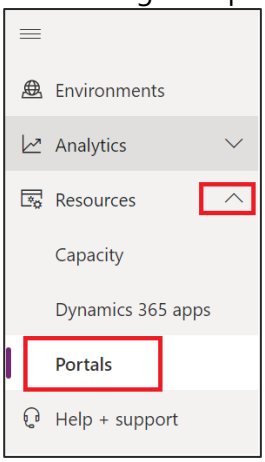


Task 4: Restart portal and verify your changes

1. In the same browser where you have logged in to the lab environment, open a new tab and navigate to **https://admin.powerplatform.microsoft.com/**
2. In the navigation pane, click on **Resources** dropdown and then **Portals**



3. In the Search box, search for <Your allocated environment Name> and you can find the **Registration Portal** show up as a search result. Click on **...** and then **Manage**

4. This should launch the Portal Admin Center in a new tab. In the Admin Center, click on **Portal Actions** and then **Restart Portal**

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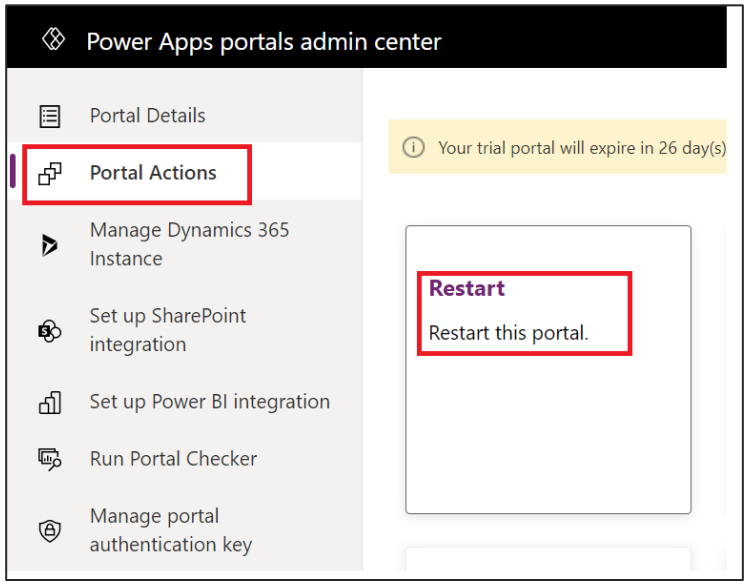
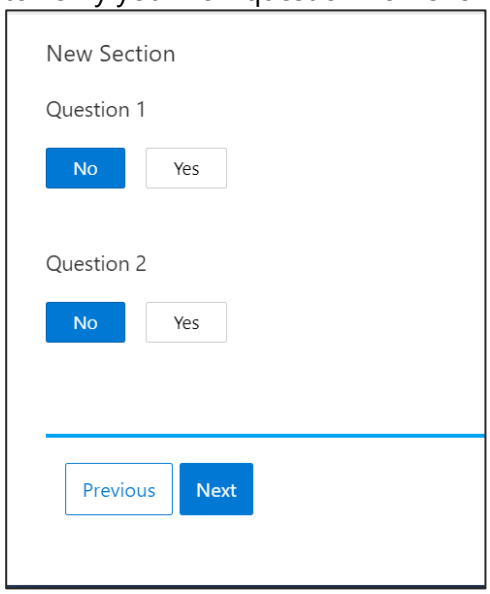


5. Once the portal restarts, navigate back to your portal page and follow the process of checking eligibility as done in Exercise1. Follow through till you reach on the Step 2 of Eligibility questionnaire to verify your new question now shows up in the portal



Congratulations! You have created a new eligibility questionnaire and plugged it in to fire in the eligibility process according to the response.

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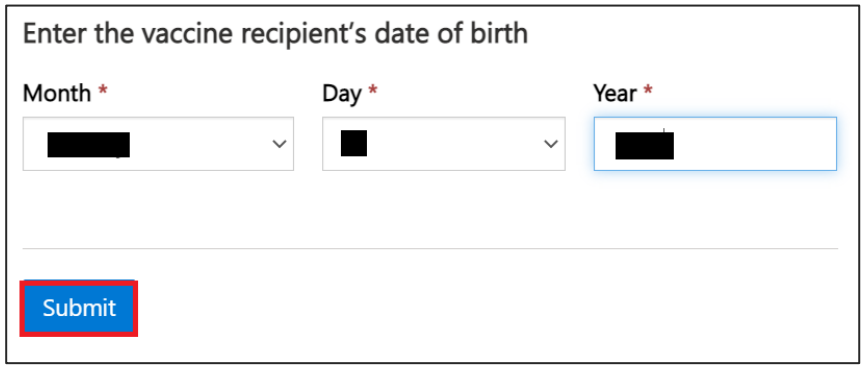
Bonus Exercise 2: Cancel and Reschedule Appointments for Vaccination via Portal

In this exercise, you will assume the persona of a public user who has registered and booked an appointment for vaccination via the portal but now wants to reschedule the appointment slot for vaccination. This exercise can be done only after you have completed Exercise 3 and the eligibility appointment mail has triggered so that you can kick off the cancellation and rescheduling experience from the link embedded in the mail.

Task 1: Navigate to portal and book an appointment

1. At the end of exercise 3, you should receive a confirmation email with an appointment confirmation QR code and a cancellation link. To launch the cancel and reschedule experience, click on **Cancel and reschedule** link in the mail.

2. It should launch the portal on your browser. Enter the same date of birth that you mentioned while registration.
Note : It is important that you mention the exact same date as the system validates you against this data.



3. Once the appointment details are loaded, click on **Cancel and Reschedule.**

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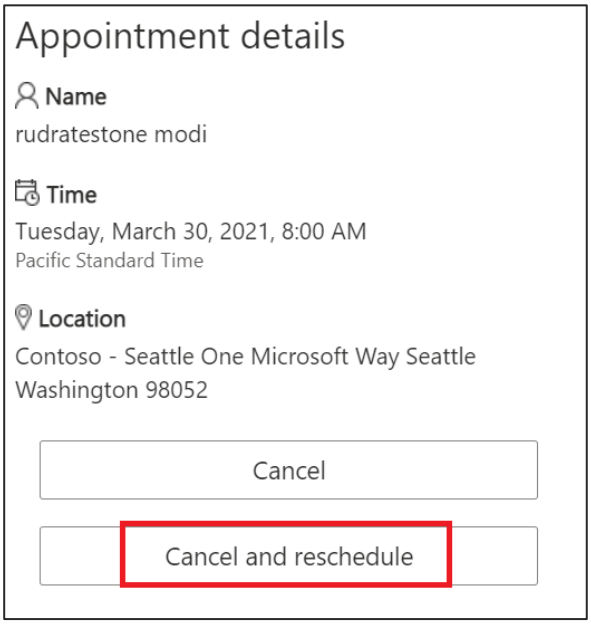
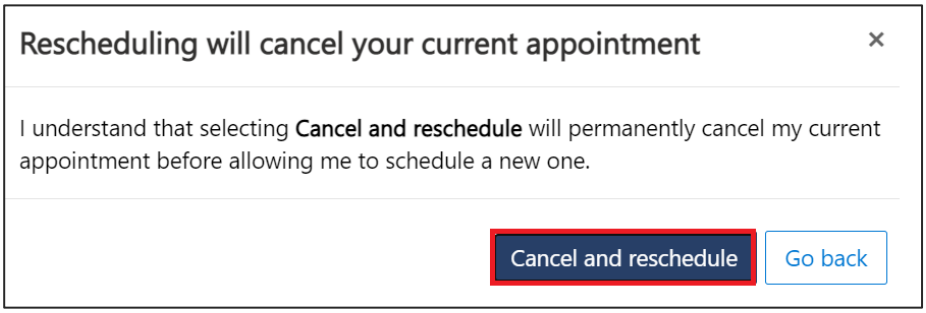
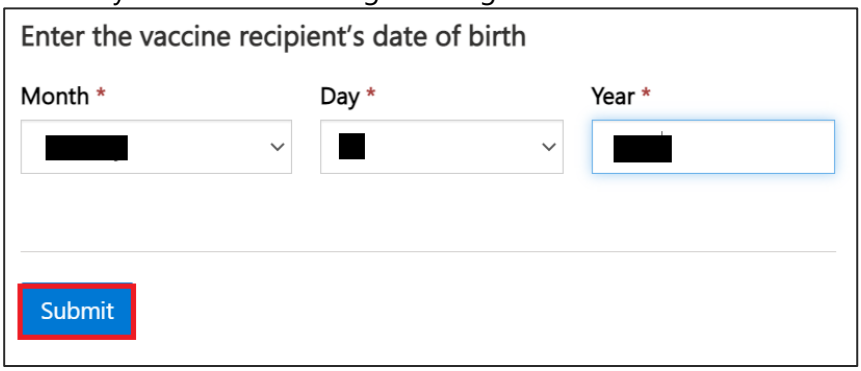


4. A dialog box asking for confirmation will appear. Click on **Cancel and reschedule**



5. Confirm your date of birth again using the same date of birth value as provided during registration.



6. Your appointment will be cancelled with a confirmation message. Click on **Schedule a new appointment.**

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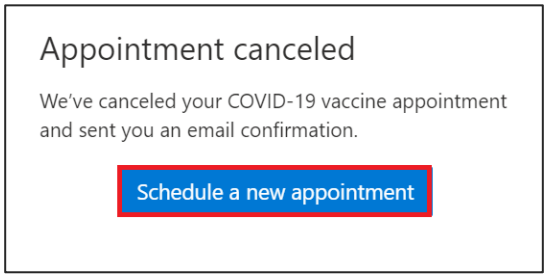
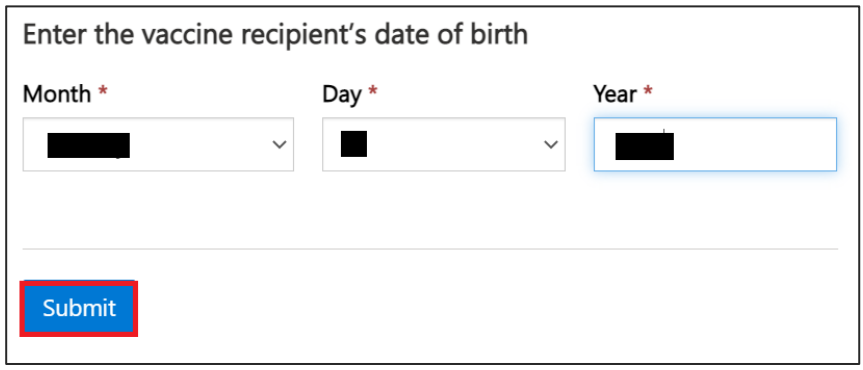


7. It will now launch the booking experience, which can be completed using steps in Exercise 3 as reference.



Congratulations! You have now cancelled and rescheduled your appointment for vaccination.

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Summary

In this lab, you learned

- Overall Microsoft Vaccination Management Registration and Booking capabilities
- How to check vaccination eligibility and register through the Vaccination Management Portal
- How to book an appointment when you are eligible
- How to waitlist yourself for the next eligible vaccination phase in case you are not eligible
- How to configure the Vaccination Management Portal for new questions and scenarios

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Lab Survey

We would appreciate your feedback on Microsoft Vaccination Management 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/MVMIADSurvey** 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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