ReadMe for Patient Registration demo

This ReadMe will explain how to use this Patient Registration demo content.

This demo will involve MORF, Power automate, Sharepoint, PDF Document Generation Service and Adobe Acrobat Sign.

Upon submission from Morf form, it will merge the data to a word template(stored in a sharepoint folder) using Document Generation API service. These are all processed and automated in Power Automate.

After hitting submit, the end user is then forwarded directly to the signing page in Adobe Acrobat Sign. Then a second signer will counter sign after via opening e-sign request email.

To see a full preview of this demo, visit
https://preview.getmorf.io/?form=/demos/health/patientregistration/patient%20registration.json

Get Started

1. Acquire a 'Site Key' by going to MORF editor https://editor.getmorf.io/#/ and clicking Request site key. (Name, email, Organization name and domain info are required)
2. Download the Word file template here
   https://github.com/aftialabs/morf-preview/blob/main/demos/health/patientregistration/We.Health%20-%20Patient%20Registration%20form.docx
3. In a Sharepoint Site, create a Sharepoint folder and add the Patient Registration form word file here

Power Automate setup

Create an automated flow in your power automate and rename any of the steps below to your liking.

Once the flow has been saved, an HTTP POST URL will be generated from the first step and this URL will need to get copy and pasted into the **submit** field in the Patient Registration JSON.

Submitting data to the HTTP POST URL will trigger this flow and do the processing/automation of the json data payload. It then respond back to the POST API origin with the Signing URL. Morf will then forward the page from the form straight to the signing experience in Adobe Acrobat Sign.

1. Select 'When an HTTP request is received' on the first step
2. Select 'Initialize Variable' on the second step and enter the following below
   a. Name: data

        b. Type: Object

        c. Value: json(triggerFormDataValue('data'))

3. Select 'Get file content' (Sharepoint) for the 3rd step
   a. Site Address: [Select the Sharepoint Site the word template resides in from Get Started, step 3]
   b. File Identifier: [Select the 'Patient Registration form.docx']
4. Select 'Generate document from Word template' (Adobe PDF Services)
   a. Template File Name: We.Health - Patient Registration form.docx
   b. Merge Data: string(variables('data'))
   c. Template File Content: File Content (This is under Dynamic content > Get file content)
5. Select 'Upload a document and get a document ID' (Adobe Sign)
   a. File Name: Output File Name (This is under Dynamic content > Generate document from Word template)
   b. File Content: Output File Content (This is under Dynamic content > Generate document from Word template)
6. Select 'Create an agreement from an uploaded document and send for signature' (Adobe Sign)
   1. Agreement Name: We.Health - Patient Registration for @{variables('data')?['patient']?['firstName']} @{variables('data')?['patient']?['lastName']}
   2. Document ID: Document ID (Select this under Dynamic Content > Upload a document and get a document ID)
   3. Signature Type: ESIGN
   4. 1st Participant Email: variables('data')?['patient']?['email']
   5. For the second recipient, input any demo account you would like to use as the second signer.
7. Select 'Do until'
   a. Add: outputs('Retrieve_the_Signing_URL')?['body/signingUrlSetInfos']?[0]?['signingUrls']?[0]?['esignUrl'] 'is not equal to' null
   b. Select 'Delay'
      i. Count: 2
      ii. Unit: Second
   c. Select 'Scope' and rename this step to Try
      i. Select 'Retrieve the Signing URL' (Adobe Sign)
         1. Agreement ID: Agreement ID (Select this under Dynamic content > Create an agreement from an uploaded document and send for signature)
   d. Select 'Scope' and rename this step to Catch
      i. Apply any catch method you prefer
8. Select 'Initialize variable'
   a. Name: url
   b. Type: String

      c. Value:
         outputs('Retrieve_the_Signing_URL')?['body/signingUrlSetInfos']?[0]?['signingUrl
         s']?[0]?['esignUrl']

9. Select 'Response' (HTTP)
    a. Status Code: 200
    b. Headers: Content-Type | application/json
    c. Body:

```
{
  "successUrl": @{variables('url')}
}
```

Using JSON code to generate the complete MORF form

1. Go to
   https://github.com/aftialabs/morf-preview/blob/main/demos/health/patientregistration/patient%20registration.json
2. Copy the JSON code and paste it into the editor in https://editor.getmorf.io/#/
3. You will see the full form on the right side
4. Paste the HTTP POST URL from 'Power Automate section, step 1' into the Submit field
1. Paste the Site Key from 'Get Started, step 1' into the sitekey field
5. Click on Preview at the top and a new tab will open
6. Fill out the form and you can hit Submit to test

Submit

1. Submitting the form will give a Spinning loading icon/message
2. If everything is setup correctly, the user will be brought straight to Adobe Acrobat Sign to complete the first recipient's signature