



Microsoft Cloud for Healthcare **Industry Labs**

Lab 02: Patient Outreach

Step-by-Step Lab

September 2021

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Overview

Learning Objectives

In this module, you will learn how to do the following:

- Create a Patient Segment
- Create a Marketing Email
- Create a Patient Journey
- Create a virtual healthcare Marketing Event

Prerequisites

- Lab 01 – Care Management

Patient Outreach Application

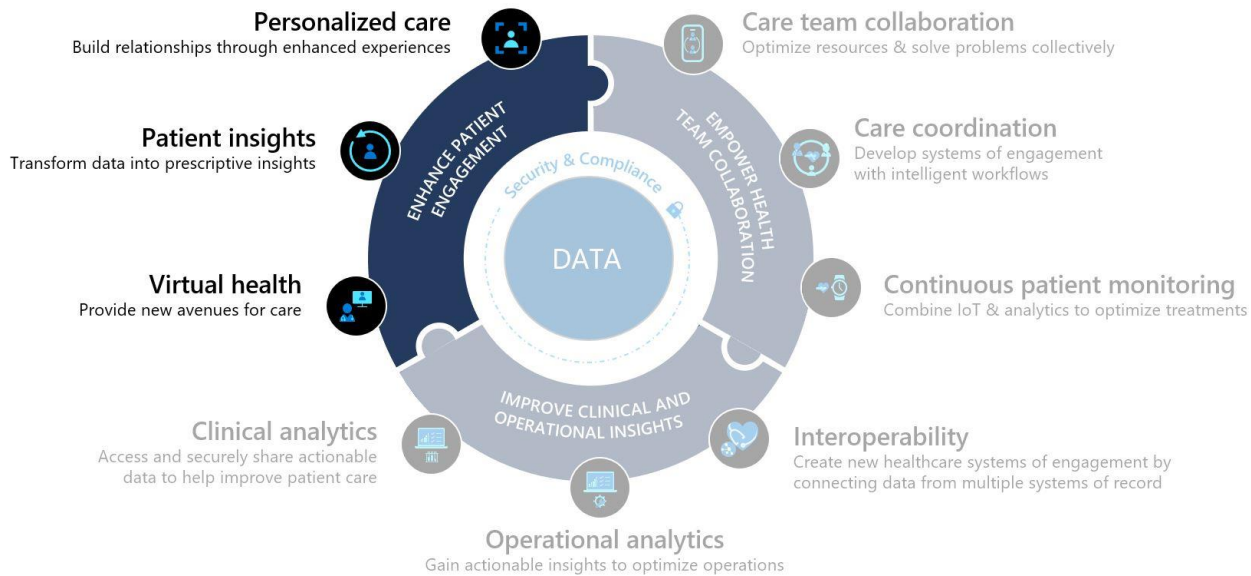
The **Patient Outreach** application allows healthcare providers to communicate with their communities and patients in a targeted, efficient way. Patient Outreach is a patient campaign management application that helps organize and automate marketing and outreach to patients.

Key capabilities of **Patient Outreach** include:

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

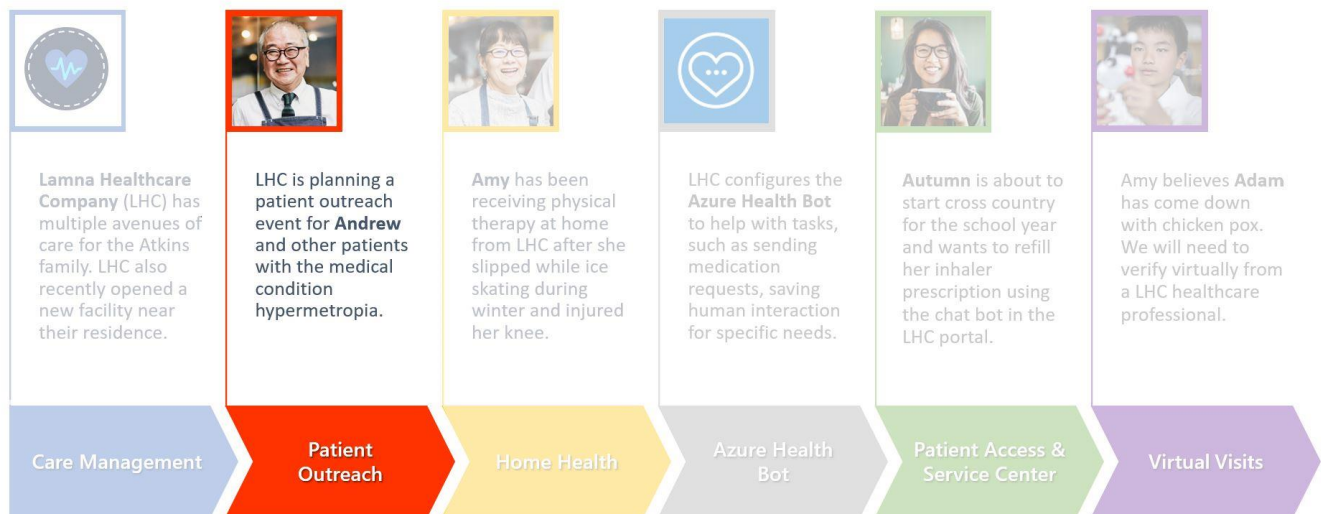
Industry Prioritized Scenarios

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



Atkins Family Healthcare Story

This lab will focus on the healthcare story of Andrew Atkins.



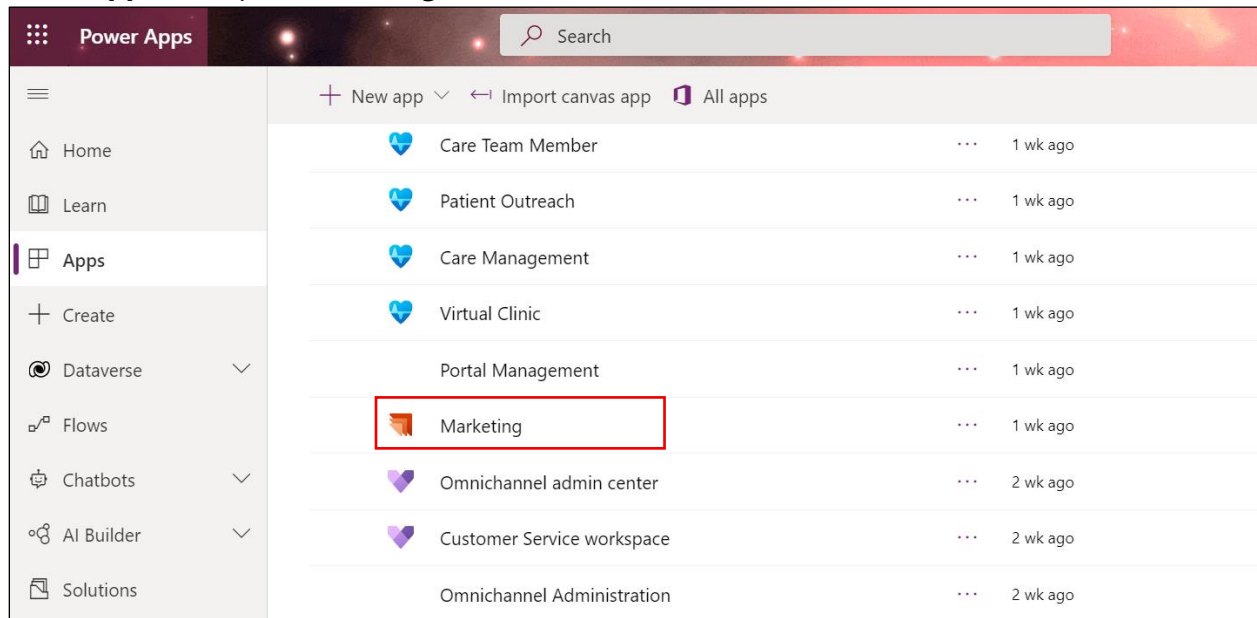
At his annual check-up earlier this year, Andrew learned that he has hypermetropia, a common eye condition in adults in which nearby objects are blurry. Lamna Healthcare Company has seen a recent influx of patients who would like to be more educated on hypermetropia and has decided to increase their patient outreach efforts by hosting a virtual marketing event.

In this lab, you will play the role of a Lamna Healthcare Company marketing administrator and utilize Microsoft Cloud for Healthcare's Patient Outreach capabilities to create a virtual marketing event.

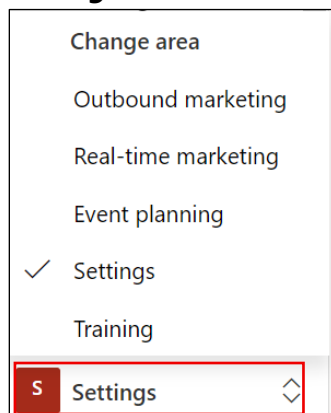
Exercise 1: Create a Patient Segment

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

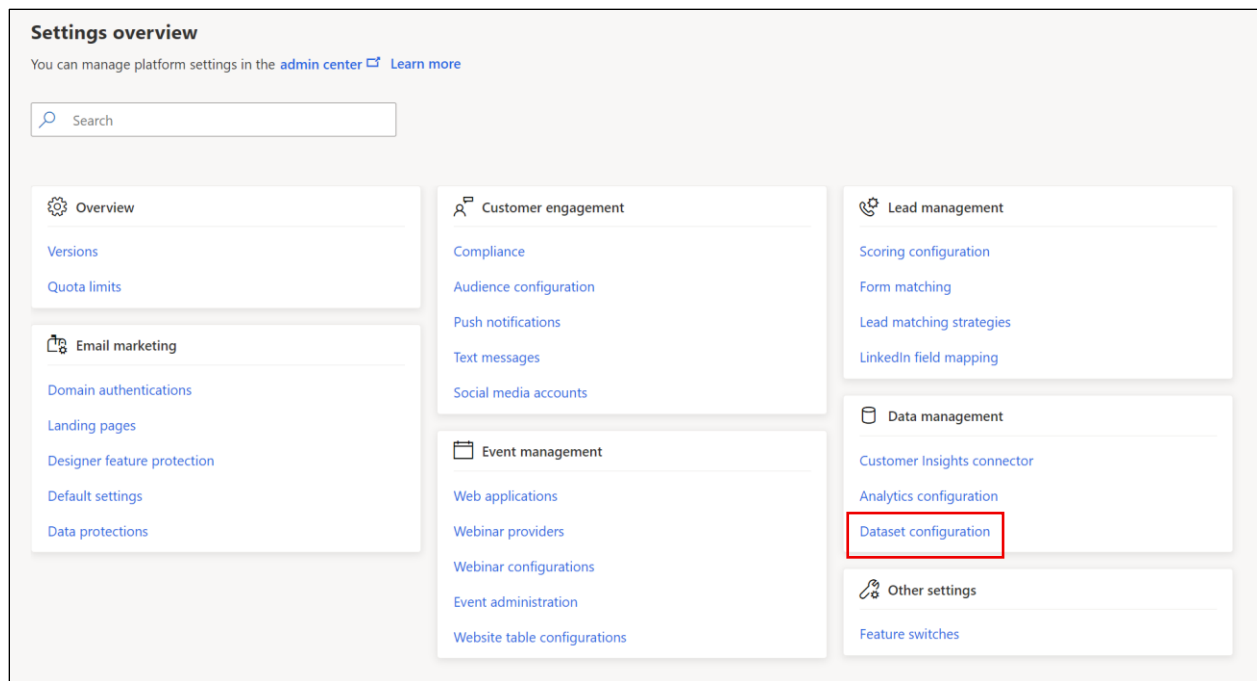
1. While logged into your Microsoft 365 tenant, navigate to make.powerapps.com.
2. Go to **Apps** and open **Marketing**.



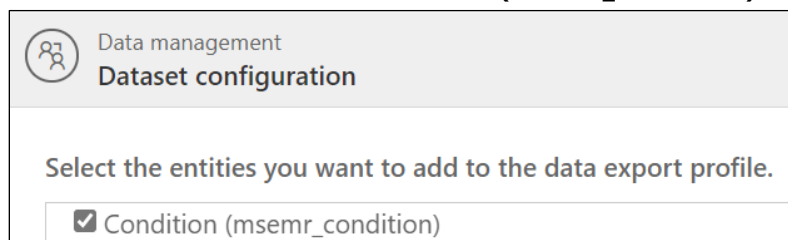
3. Navigate to the **bottom left on the screen** and change the drop-down selection from Marketing to **Settings**.



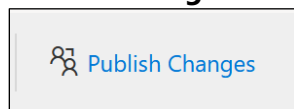
4. On the Settings overview screen, select **Dataset configuration** under Data management.



5. Scroll down and select the **Condition (msemr_condition)** entity.

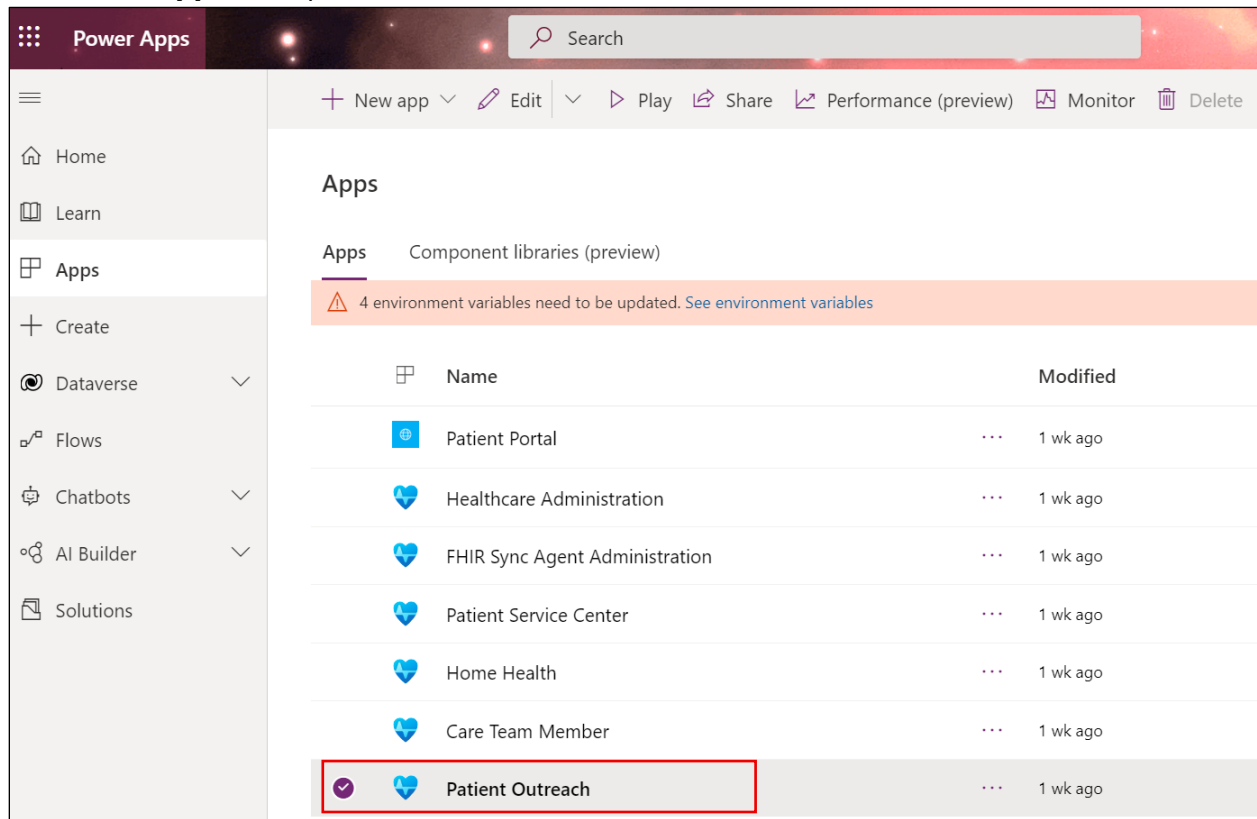


6. **Publish Changes** on the top right.

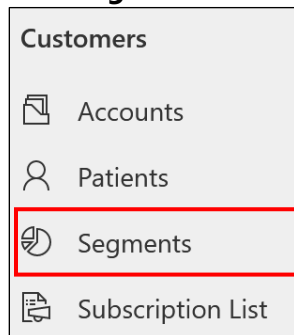


Note: While it may take up to 30 minutes for changes to take effect, they are generally ready in a few minutes.

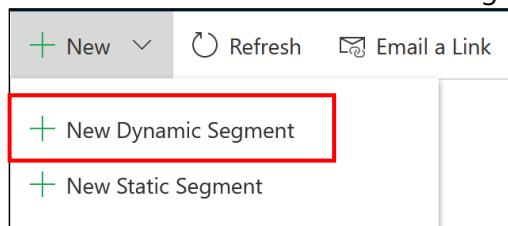
7. Go back to **Apps** and open **Patient Outreach**.



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

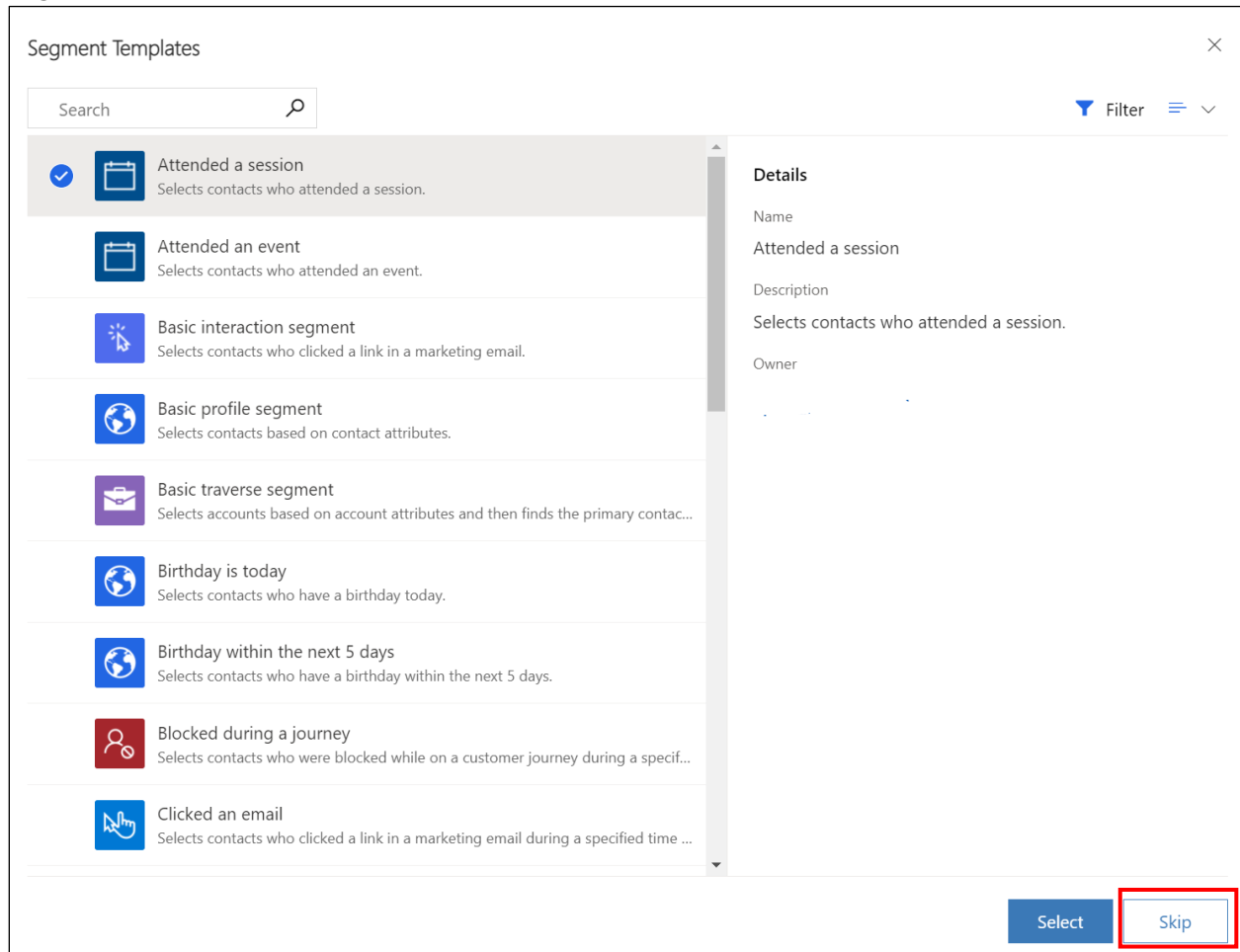


9. Click **New** to create a new Patient Segment. Select **+ New Dynamic Segment**.

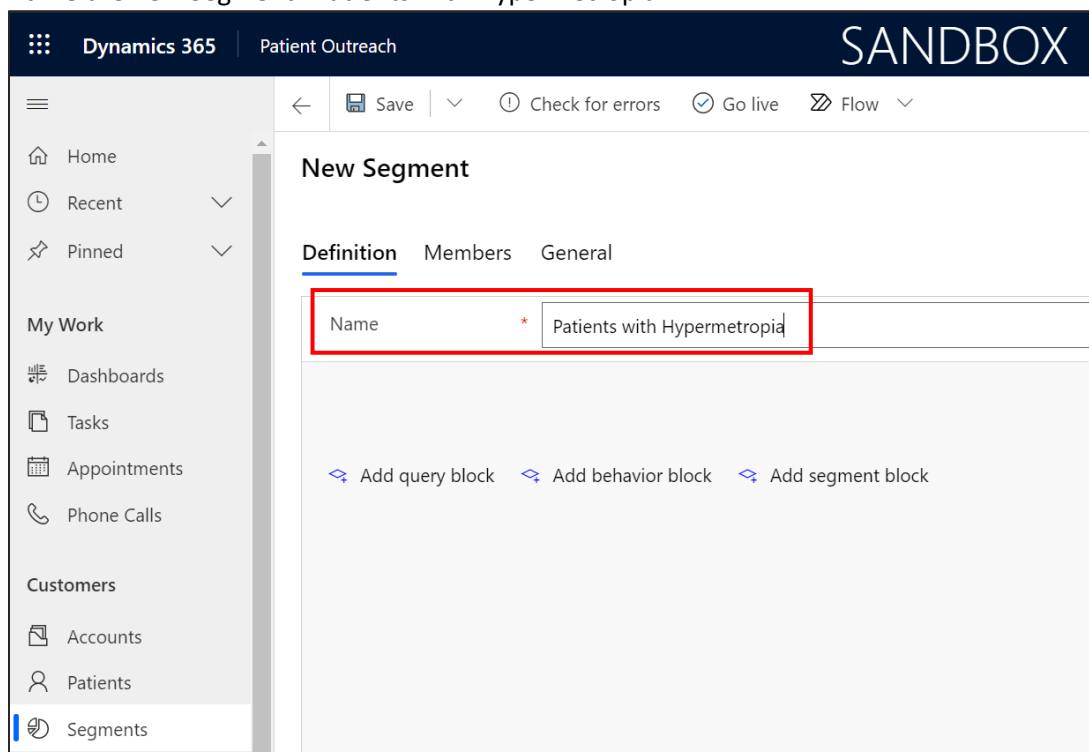


Did you know? *Static segments* enable you to choose and add segment members manually based on existing lists or search results. *Dynamic Segments*, which you define by using a set of rules and conditions, are constantly and automatically changing based on information in your database. Since we want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

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



11. Name the new Segment “Patients with Hypermetropia”.



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

The screenshot shows the 'Contact' entity configuration. The main condition is 'Status equals Active'. A related entity 'Condition (Condition -> Contact (Patient))' is added with the condition 'Description contains Hypermetropia'. The interface includes a tree view on the left and a list of conditions on the right.

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

The screenshot shows the command bar with a 'Save' button (floppy disk icon) and a 'Go live' button (checkmark icon) both highlighted with red boxes. Other buttons include 'Check for errors', 'Flow', and a back arrow.

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

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

The screenshot shows the 'Patients with Hypermetropia' segment page. The 'Members' tab is selected, displaying a list of 4 members. The table includes columns for Full Name, Email, Company Phone, and Household. The last evaluation time is 9/1/2021 10:29 AM.

Full Name	Email	Company Phone	Household
Andrew Atkins	Andrew.Atkins@contoso.com	---	Atkins Household
Casey Jensen	Casey.Jensen@contoso.com	---	---
Elizabeth Moore	Elizabeth.Moore@contoso.com	---	---
Jessie Irwin	Jessie.Irwin@contoso.com	---	---

1 - 4 of 4

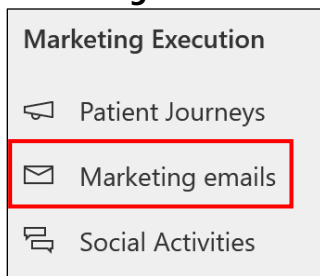
ⓘ The segment member list only shows those contacts that you are permitted to view. It may also include additional contacts for which you don't have read permission.

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

Exercise 2: Create a Marketing Email

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

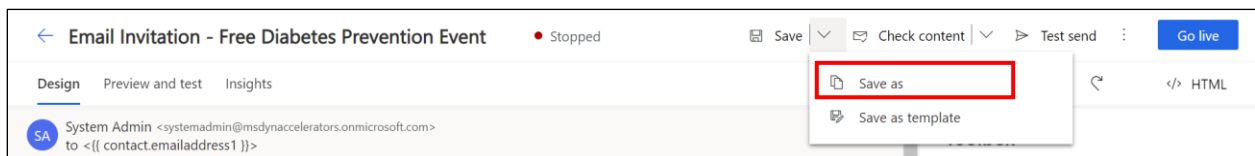
1. In the Patient Outreach app, scroll down to **Marketing Execution** in the left navigation pane and click **Marketing emails**.



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


Active marketing emails ▾	
✓ Name ▾	Subject ▾
Email Invitation - Free Diabetes Prevention Event	{{contact.firstname}}, you are invited!
Follow-up Email - Free Diabetes Prevention Event	{{contact.firstname}}, do not forget to register for e...
Thank You Email - Free Diabetes Prevention Event	{{contact.firstname}}, thank you for joining us!
Breast Cancer Screening	Breast Cancer Screening
Adult BMI Assessment (ABA)	Adult BMI Assessment (ABA)
Email 21u (erice)	Crisis Management
Email 23q (gairo)	Crisis Management Tool Link

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



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

Quick Create: Marketing email
×

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

Save and Close

▼

Cancel

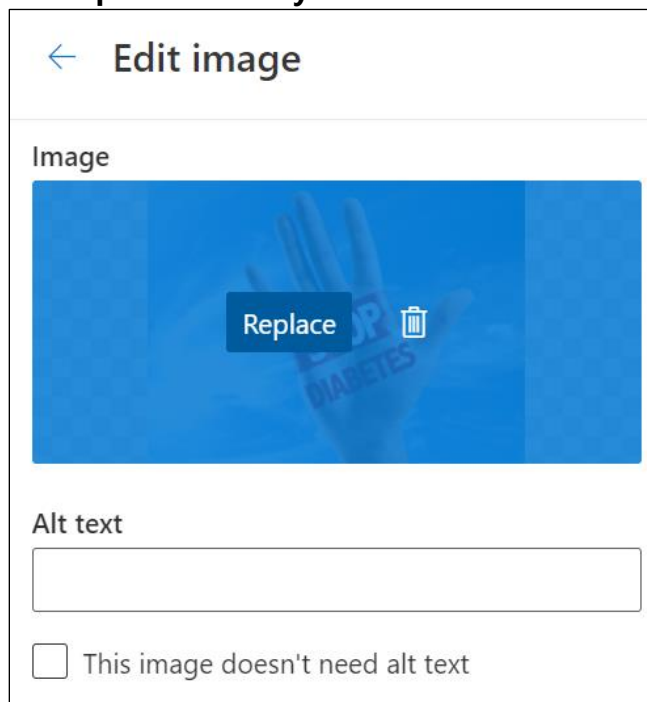
- Navigate back to Marketing emails list and select your newly created segment **"Email Invitation – Healthy Eye Virtual Seminar"**.

Active marketing emails ▾	
✓ Name ▾	Subject ▾
Email Invitation - Healthy Eye Virtual Seminar	{{contact.firstname}}, you are invited!
Email Invitation - Free Diabetes Prevention Event	{{contact.firstname}}, you are invited!
Follow-up Email - Free Diabetes Prevention Event	{{contact.firstname}}, do not forget to register for e...
Thank You Email - Free Diabetes Prevention Event	{{contact.firstname}}, thank you for joining us!
Breast Cancer Screening	Breast Cancer Screening
Adult BMI Assessment (ABA)	Adult BMI Assessment (ABA)
Email 21u (erice)	Crisis Management
Email 23q (gairo)	Crisis Management Tool Link

6. Click the image in the Designer and click **Replace** in the Edit Image pane.



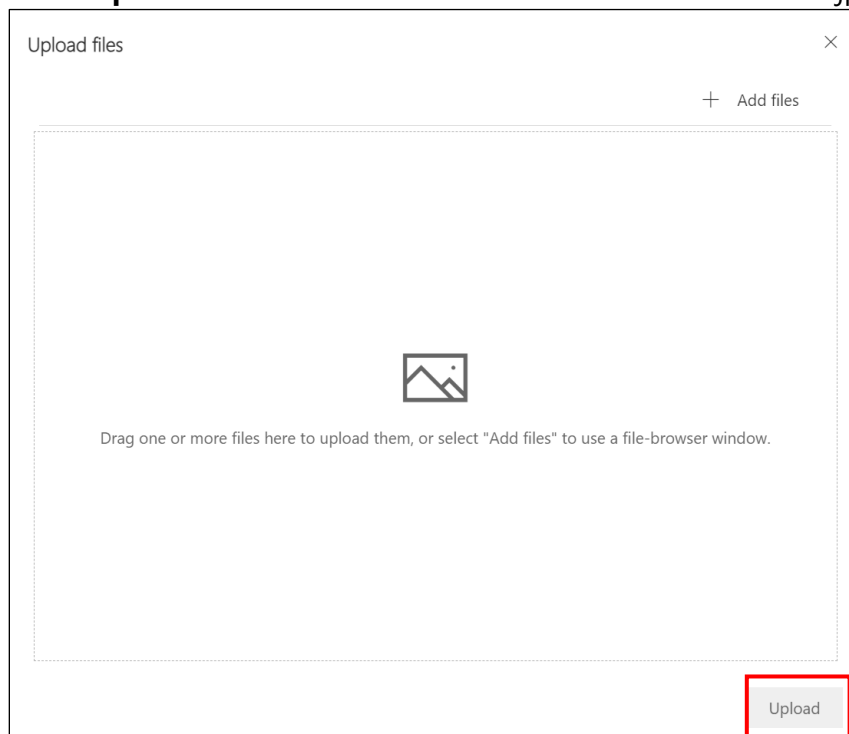
7. Click **Upload to library**.



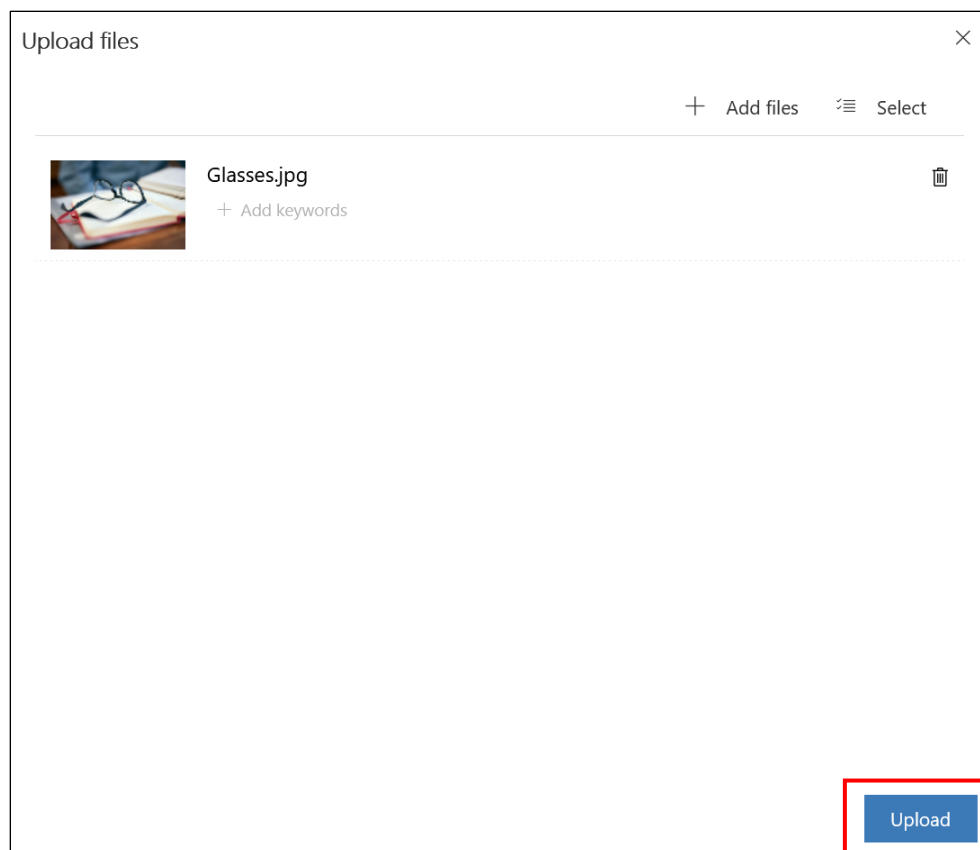
8. **Right click** the image below and **Save as** Glasses.jpg.



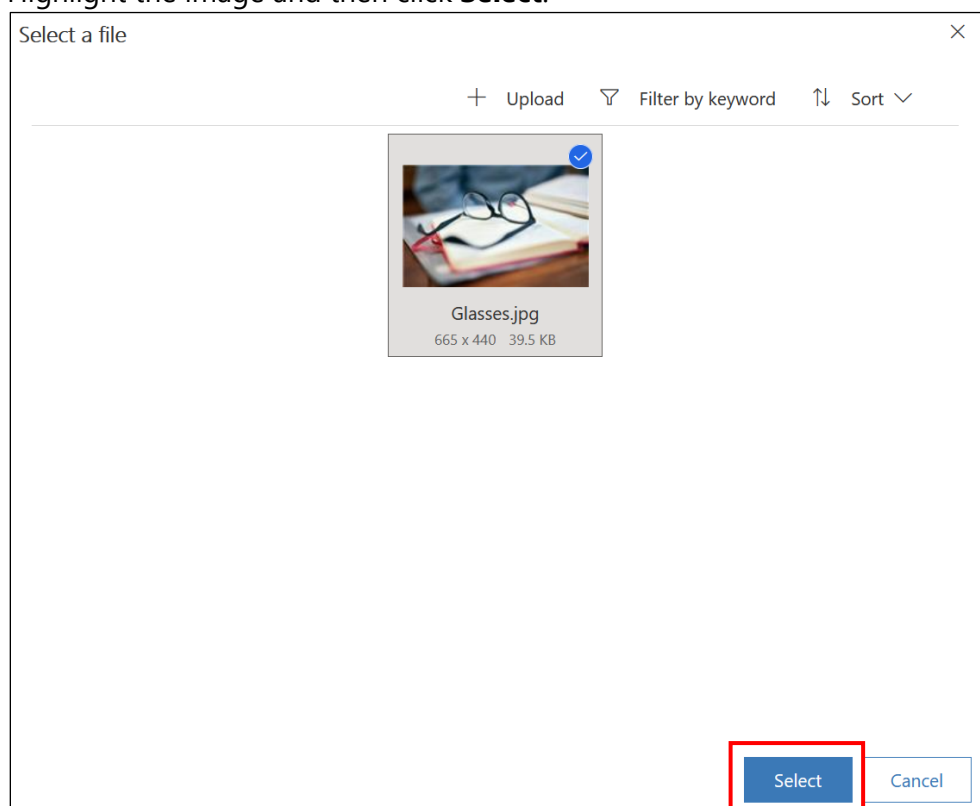
9. Select **Upload**. Select **Add files**. Find and select the file "Glasses.jpg" which you just saved.



10. Click **Upload**.



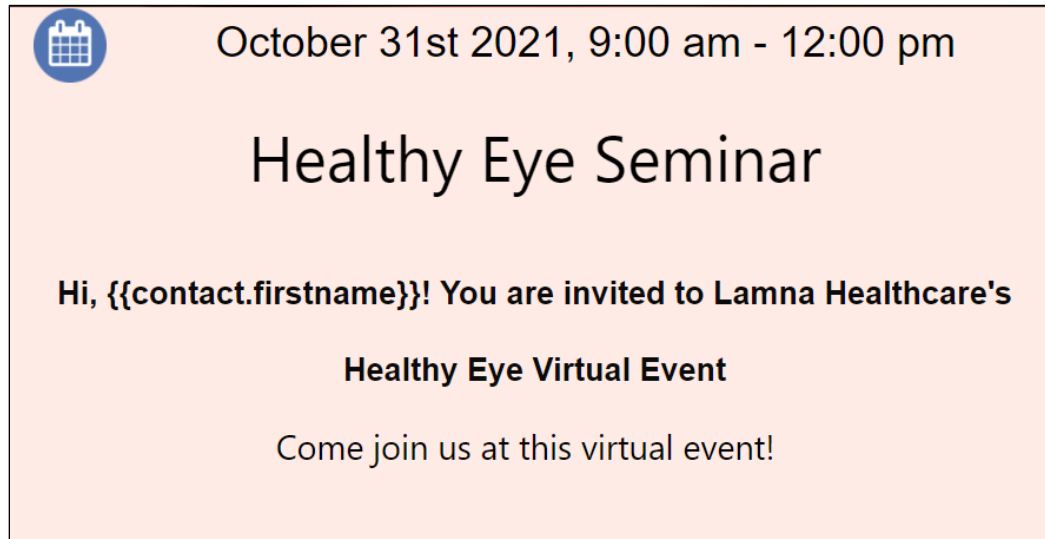
11. Highlight the image and then click **Select**.



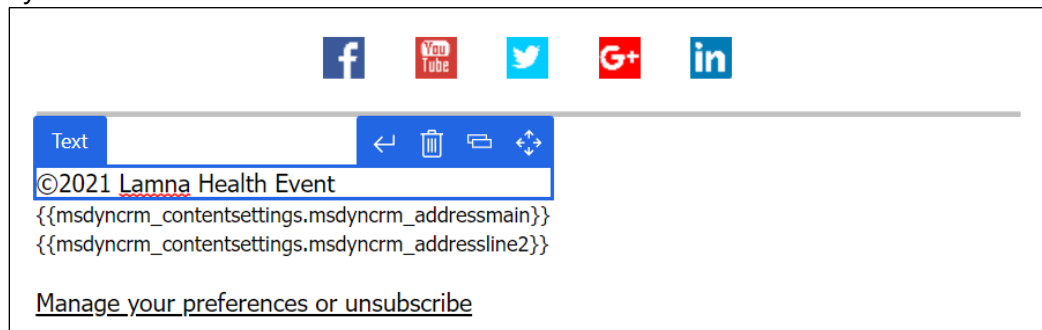
12. Edit the text of the email as follows:

- a. **Date:** Pick a date in the future
- b. **Headline:** Healthy Eye Seminar

- c. **Description 1:** "Hi, {{contact.firstname}}! You are invited to Lamna Healthcare's Healthy Eye Virtual Event.
- d. **Description 2:** "Come join us at this virtual event.



13. Edit the **footer** text of the email so that it reads **©2021 Lamna Health Event**. Do NOT edit the dynamic text below.



14. Click **Save** on the command bar and then click **Go live** so that the marketing email is available for use.

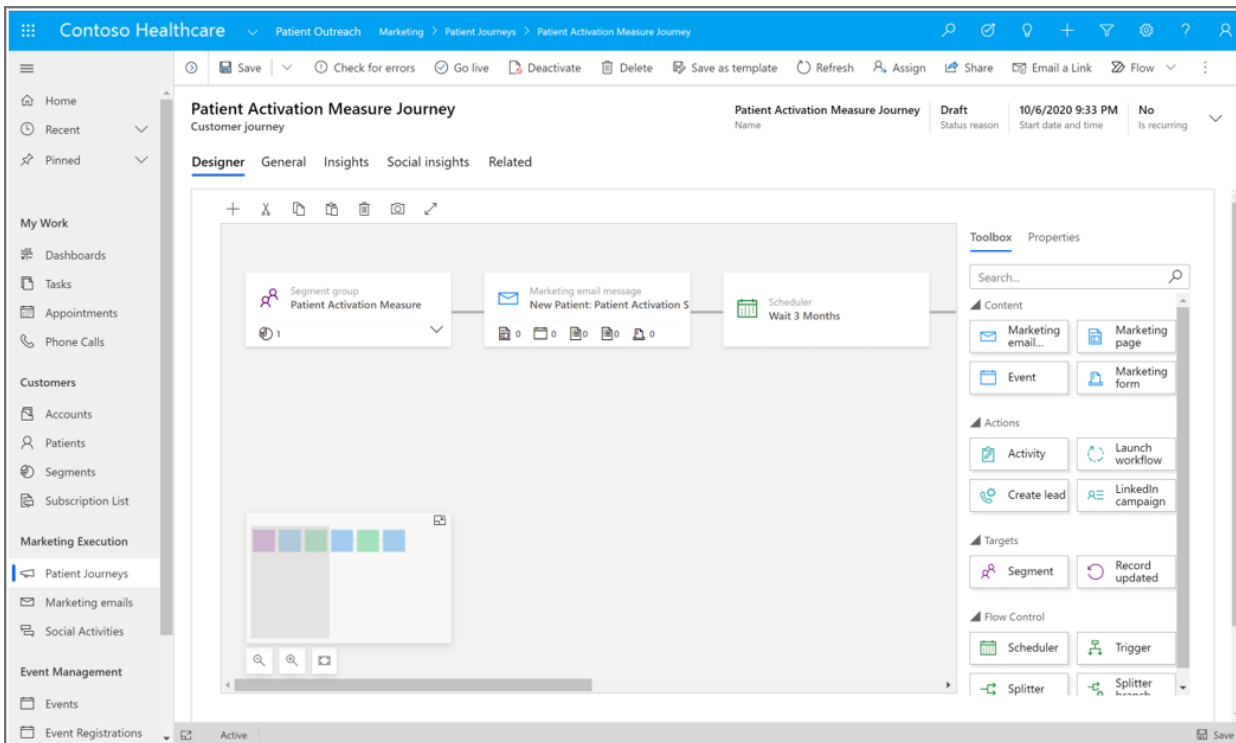


Congratulations! You have completed the steps to create a marketing email that can be used for patient outreach. This marketing email will be used in the next set of tasks in the next exercise.

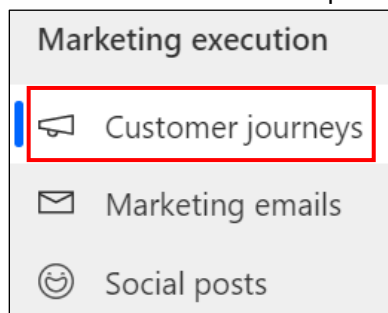
Exercise 3: Create a Patient Journey

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

Here is an example of a configured **Patient Journey**, which focuses on the Patient Activation Measure segment group and sends them a marketing email after a 3-month waiting period.



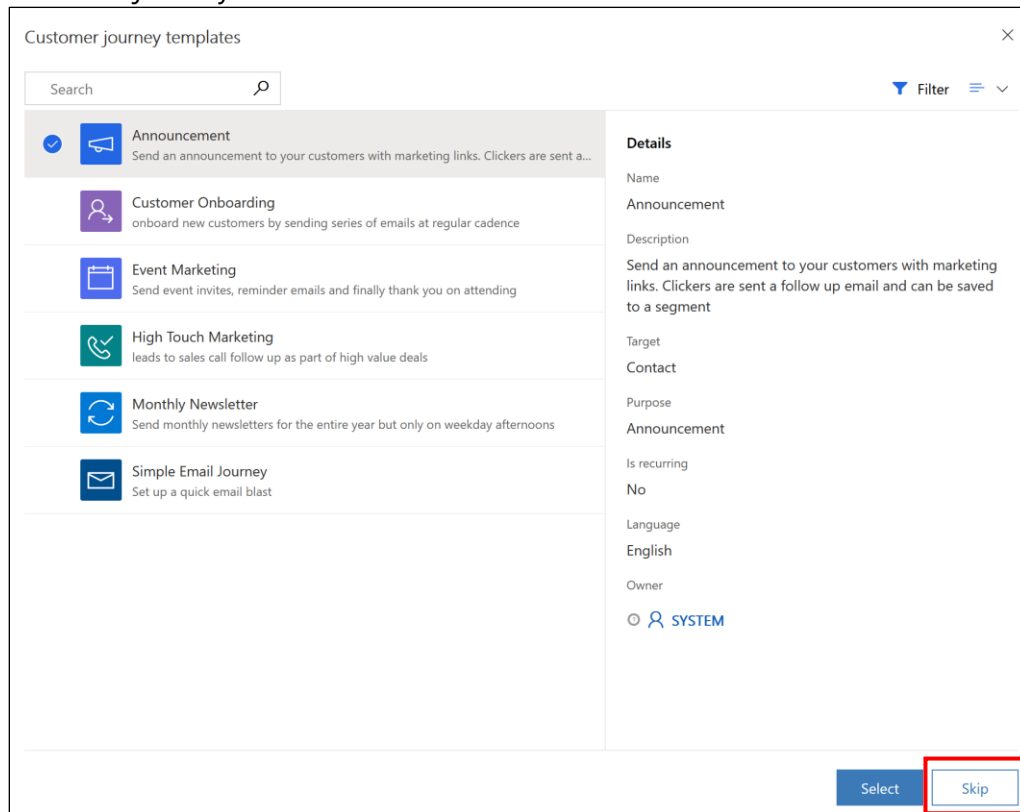
1. In the Patient Outreach app in make.powerapps.com, click **Customer journeys** under Marketing execution on the Site map.



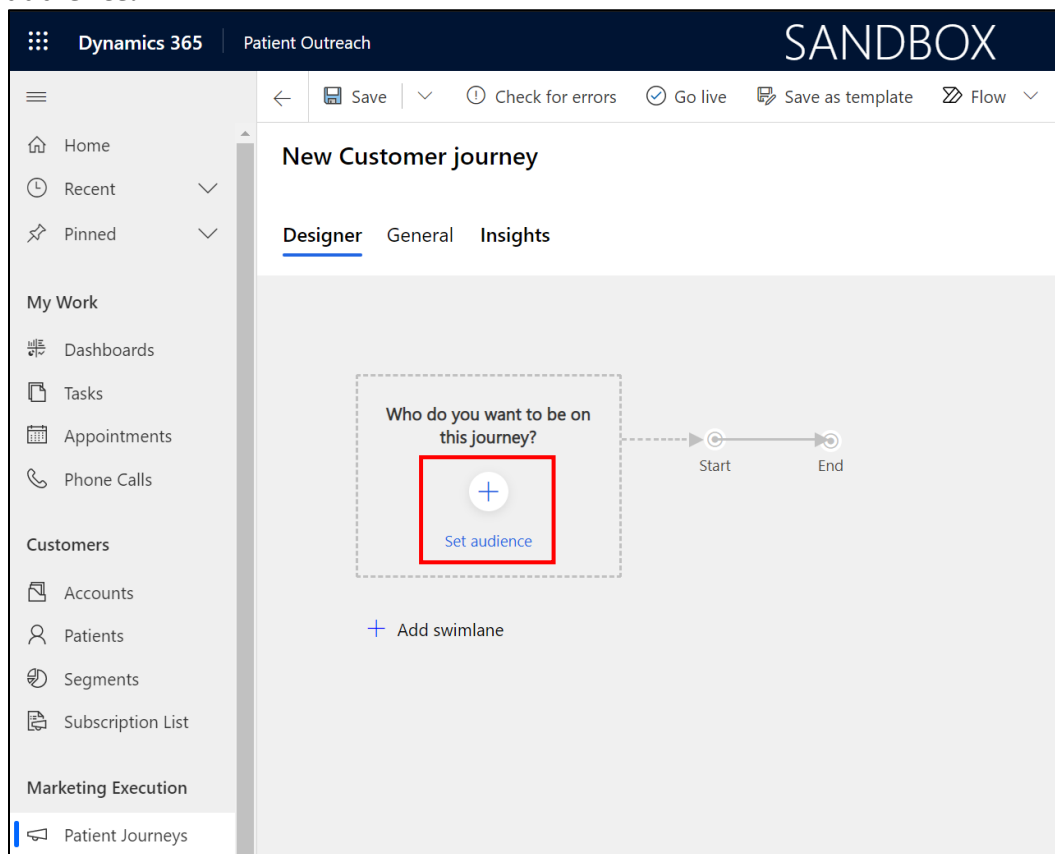
2. Click **New** to create a new Patient Journey.



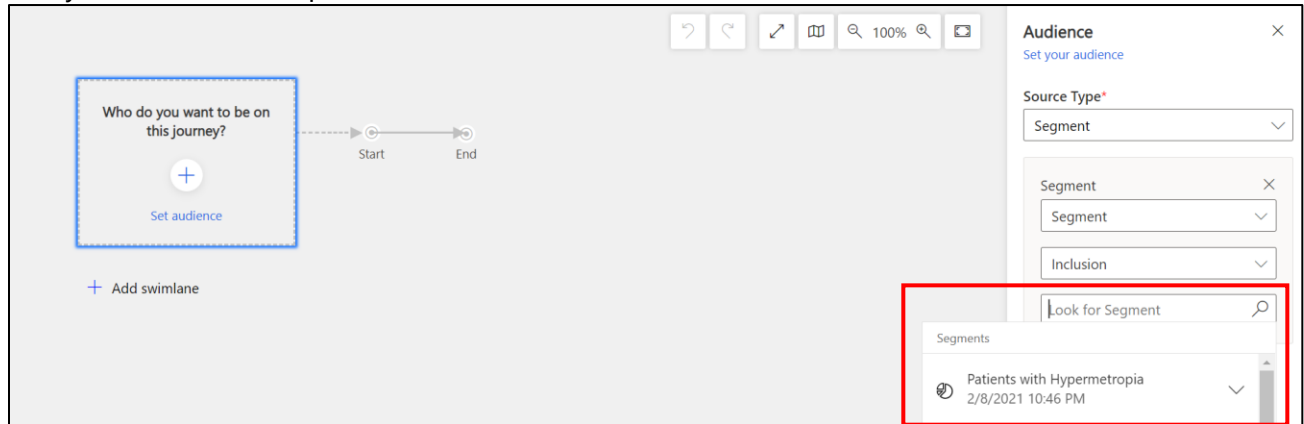
3. When prompted to choose a Customer journey template option, click **Skip** as we will create our own customer journey.



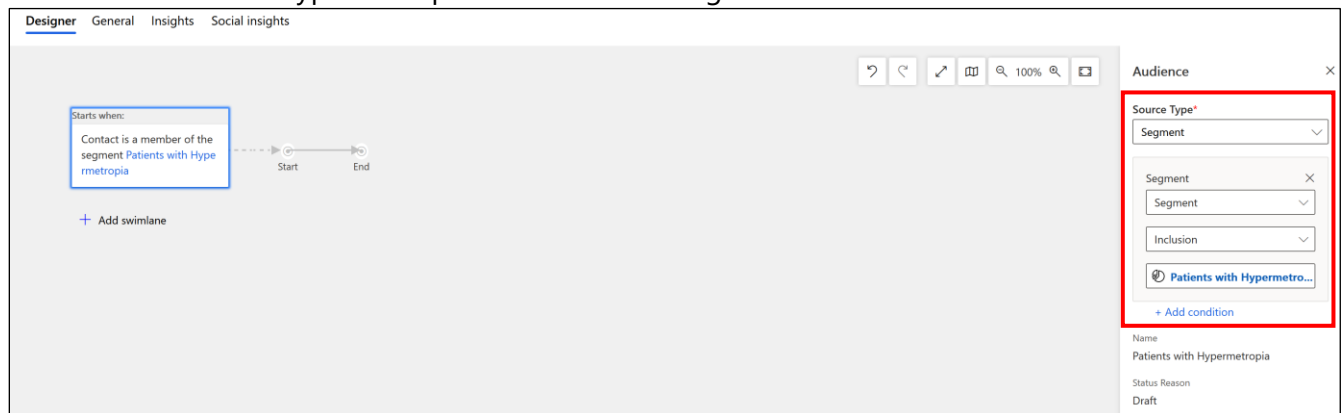
4. In the Designer view under “Who do you want to be on this journey”, select the plus sign to **Set audience**.



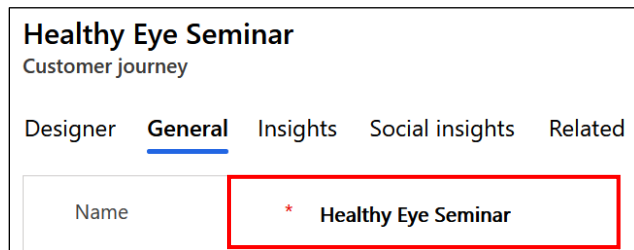
5. In the Audience panel that shows on the right, **search** for the “Patients with Hypermetropia” segment that you created in the previous task.



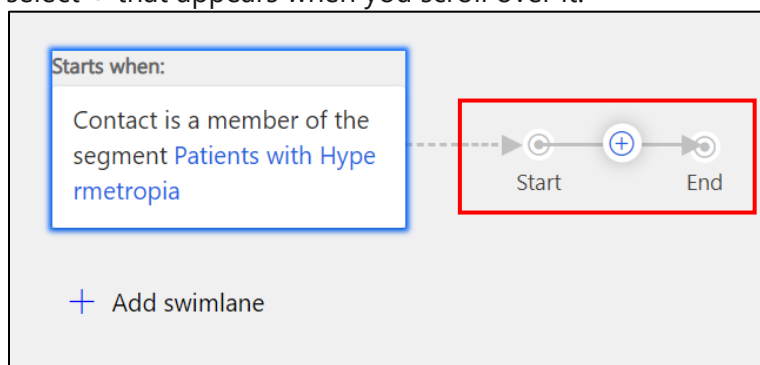
6. Select “Patients with Hypermetropia” for the source segment.



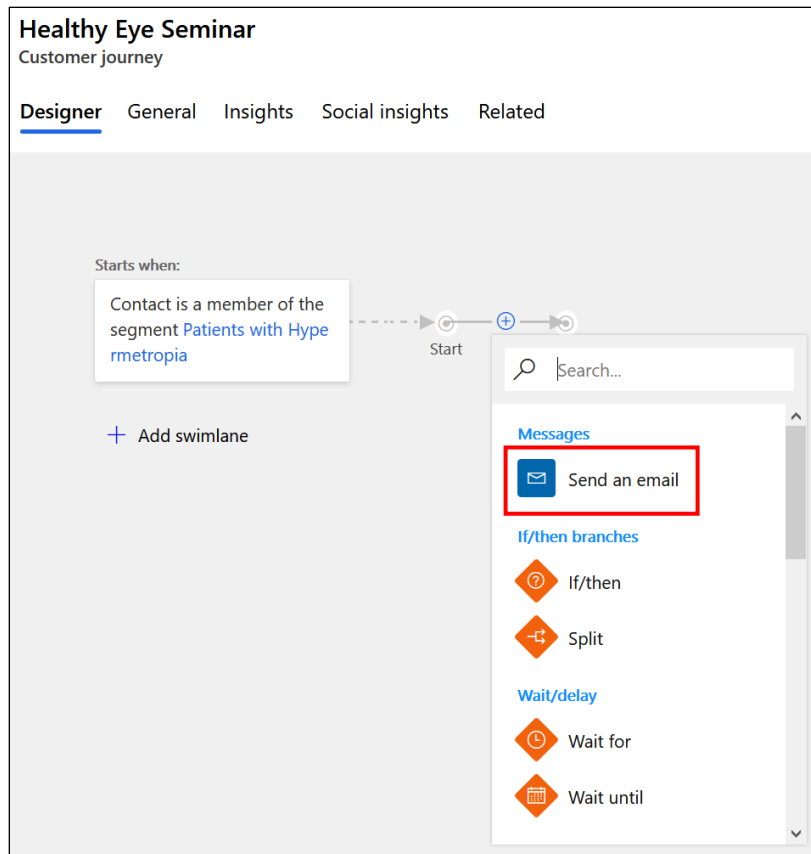
7. Click the **General** view and rename the record to “Healthy Eye Seminar”. Click **Save**.



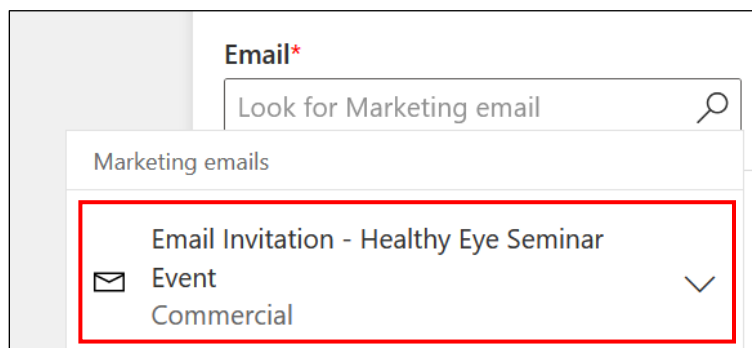
8. Go back to the **Designer** view. On the canvas between the gray arrows after the starting box, select + that appears when you scroll over it.



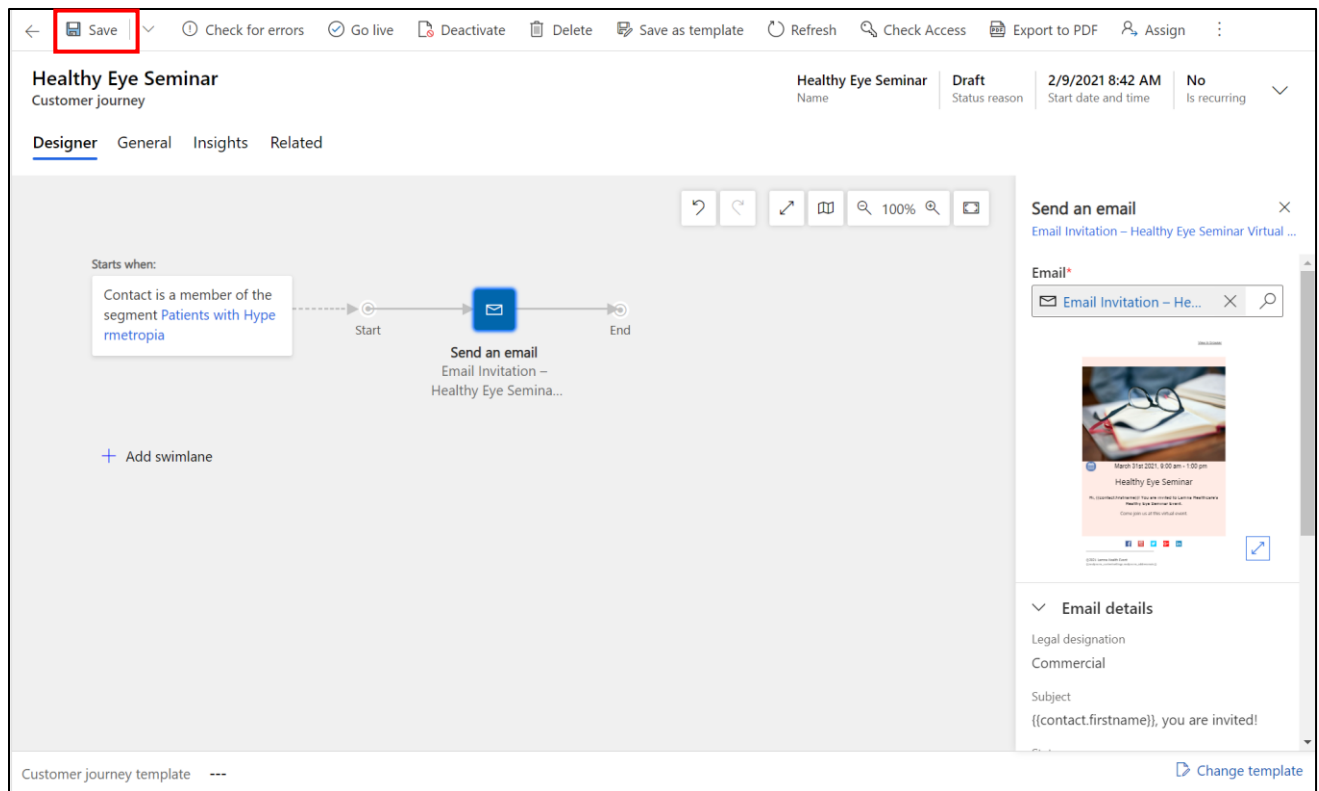
9. Select **Send an email** from the contextual menu.



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



11. Click **Save**.

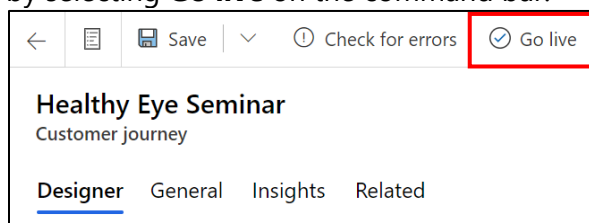


12. Switch to **General** view and configure the run schedule for your customer journey. Enter a **Start and End** date and time that makes sense for your event. If you want to see insights for the journey, choose an upcoming Start time on today's date. Remember the dates you enter for the next exercise.

Start date and time	9/1/2021	
	11:06 PM	
End date and time	10/29/2021	
	11:06 PM	
Time zone	(GMT-08:00) Pacific Time (US)	
Content settings	Default Content Settings	

13. Click **Save**.

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



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

Healthy Eye Seminar
Customer journey

Healthy Eye Seminar
Name

Going live
Status reason

11/16/2020 7:48 AM
Start date and time

No
Is recurring

Designer General Insights Social insights Related

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

Contacts in journey:

Start

Send an email
Email Invitation - ...

End

Send an email
Email Invitation - Healthy Eye Seminar Event

Email
Email Invitation - Healthy Eye Se...

March 21st 2021, 9:00 am - 1:00 pm

Healthy Eye Seminar

Hi, {{contact.firstname}}! You are invited to attend the Healthy Eye Seminar & Healthy Eye Seminar Event. Coming join us for a free eye exam. We hope you can make it!

Email details

Legal designation
Commercial

Subject
({{contact.firstname}}), you are invited!

Customer journey template ---

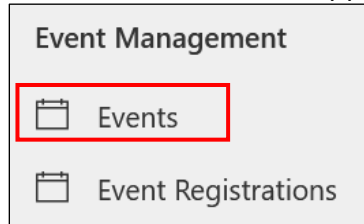
16. Once your patient journey runs, you will be able to gather **key metrics and insights** from the record. When this information is available depends on the date and time you chose for the start of the customer journey. You may come back to see the results later if they aren't yet available.

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

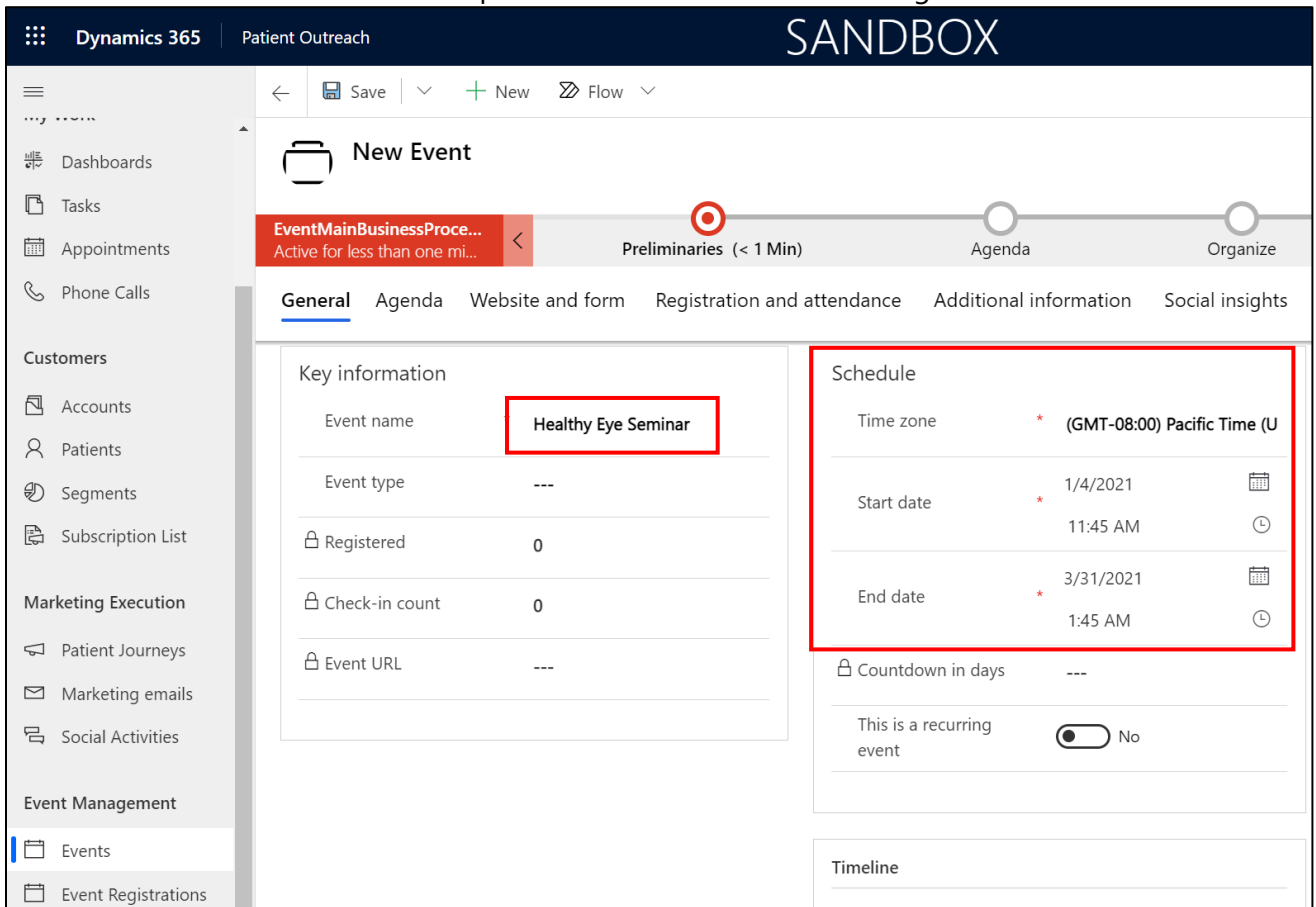
Exercise 4: Create a Virtual Healthcare Marketing Event

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

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



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


A screenshot of the 'New Event' form in the Dynamics 365 Patient Outreach application. The form is titled 'New Event' and has a command bar with 'Save', 'New', and 'Flow' options. The 'EventMainBusinessProce...' process is active. The 'Preliminaries (< 1 Min)' stage is selected. The 'General' tab is active, showing 'Key information' and 'Schedule' sections. The 'Event name' field is set to 'Healthy Eye Seminar'. The 'Schedule' section is highlighted with a red box and contains the following details: Time zone: (GMT-08:00) Pacific Time (U); Start date: 1/4/2021 at 11:45 AM; End date: 3/31/2021 at 1:45 AM; Countdown in days: ---; This is a recurring event: No. The left sidebar shows the 'Event Management' section with 'Events' and 'Event Registrations' options.

4. Click **Save**.

5. Since this will be a virtual event, in the Stream This Event Online section, toggle “**Do you want to stream this event**” to **Yes**.

Stream This Event Online

Do you want to stream this event ☐ No




Microsoft Teams is available as a streaming channel ×

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

Toggle to "Yes" to enable streaming now

Stream This Event Online

Do you want to stream this event ☒ Yes

Streaming provider *  Teams Live Events

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

HE Healthy Eye Seminar
Event

EventMainBusinessProce...
Active for 3 minutes

Preliminaries (< 1 Min) Agenda Organize

General Agenda Website and f... Active for less than one minute

Key information

Event name *	Healthy
Event type	---
Registered	0
Check-in count	0
Event URL	---

Event name * Healthy Eye Se...

Primary goal + ---

Expected outcome + ---

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

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

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

Next Stage >

(GMT-08:00) Pacific Time (U

1/4/2021 11:45 AM

3/31/2021 1:45 AM

0

No

7. Advance each stage in the business process flow until you reach the **Launch** stage. Observe the fields associated with stage as you advance through them.



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

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


9. You will now see the Teams meeting URL populated. You may also choose to make the recording available to attendees, enable Q/A for the event, as well as other options by toggling their corresponding selection to Yes.

Stream This Event Online

Do you want to stream this event

☒ Yes

Streaming provider

*  Teams Live Events

Recording available to producers and speakers

☐ No

Recording available to attendees


☐ No

Attendee engagement report

☐ No

Do you want to enable Q/A for this event

☐ No

 Attendee URL

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

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