Microsoft

# Microsoft Cloud for Healthcare

## Industry Hack

## Lab 02: Patient Triage & Self-Scheduling

September 2021

# Contents

# Resources

*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 of deep dives covering the Microsoft Cloud for Healthcare. The assumption is you have successfully reviewed the preliminary presentations, completed environment setup prior to beginning this lab.

## 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.


## 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 Hack:

- Azure Health Bot Overview
- Use Microsoft Azure Health Bot to add chat
- Azure Health Bot: Create your first scenario
- Azure Health Bot: Automatic Welcome

## Lab Goals

After this lesson you will be able to:

- Set up Azure Health Bot
- Configure Live Chat
- Embed Azure Health Bot in Power Apps Portal
- Extend Azure Health Bot for triage and scheduling

The estimated time to complete this lab is **2** hours.

# Lab Scenario

Lamna Healthcare Company understands that providing personalization at scale can be challenging. Reducing call volume and in-person visits by developing secure virtual visits, and chat bots are important to enhancing patient engagement. To meet these requirements, Lamna Healthcare's management has asked that your team implement the **Azure Health Bot** to better facilitate their patient triage and scheduling scenarios.

The Azure Health Bot Service is a cloud platform that empowers developers in healthcare organizations to build and deploy their compliant, AI-powered virtual health assistants and health bots, that help them improve processes and reduce costs. It allows you to offer your users *intelligent* and *personalized access* to health-related information and interactions through a natural conversation experience.

Using the service, healthcare organizations can build a "health bot instance" and integrate it with their systems that patients, nurses, doctors, and other representatives interact with. Building an instance allows you to:

- Improve processes
- Improve services
- Improve outcomes
- Reduces cost

The Health Bot Service contains a **built-in medical database**, including **triage protocols**. You can also extend a health bot instance to include your own scenarios and integrate with other IT systems and data sources. To learn more about Azure Health Bot, you can reference this Microsoft Docs article: Azure Health Bot Overview.

# Lab Requirements

In this challenge, Lamna Healthcare would like for you and your team to configure a patient triage and self-scheduling scenario that utilizes the Azure Health Bot. To meet these requirements, your team's solution should do the following:

- Set up and configure Azure Health Bot
  - Install Azure Health Bot from Azure Marketplace
  - Update Azure Health Bot settings to enable Dynamics 365 integration
  - Utilize the **Application ID** in your Azure tenant created for the Health Bot:
    - For official training, Application (client) ID is dfda9044-cb98-4b0f-8086-cd651dbe4af4

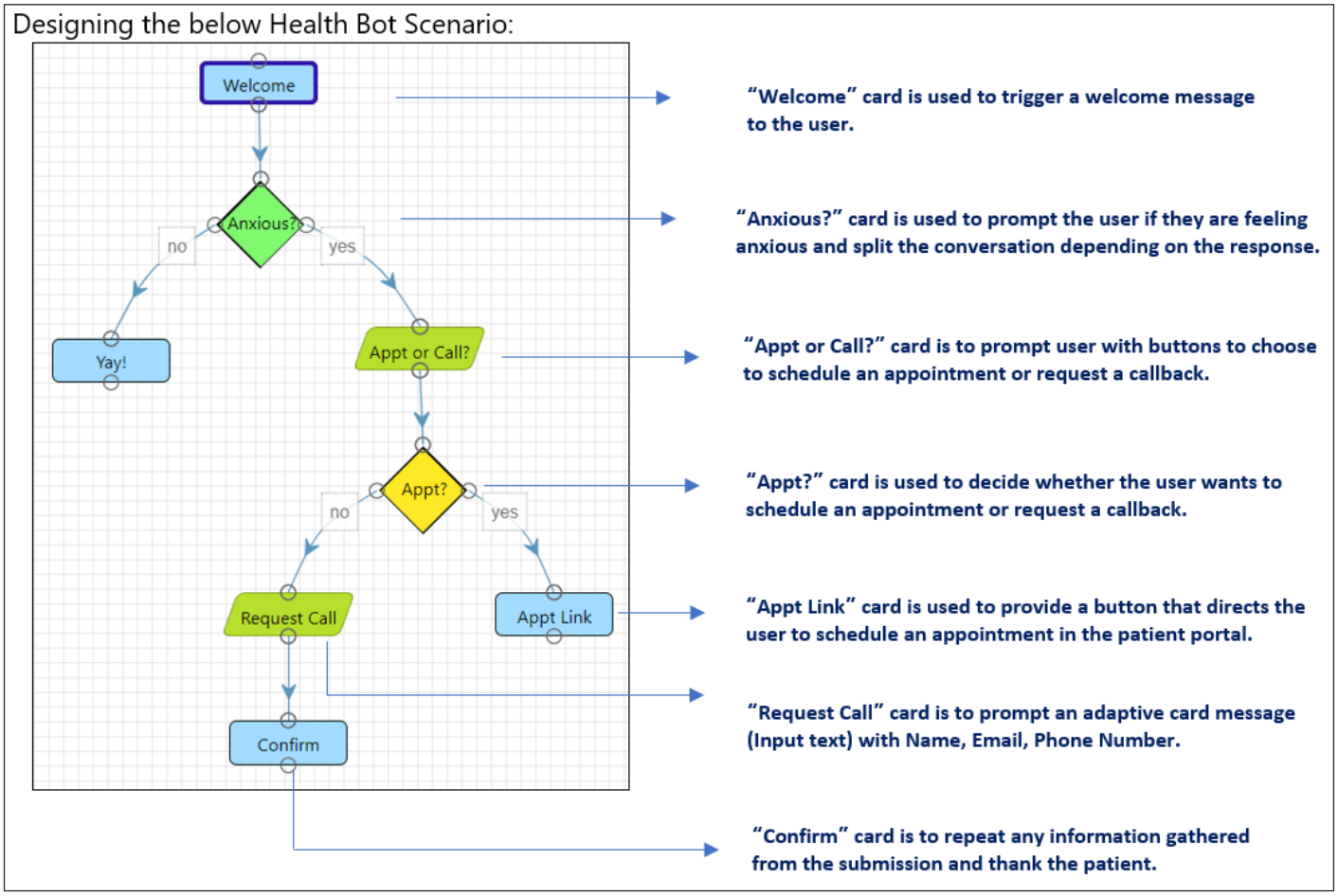
- Configure Omnichannel Live Chat
  - Assign the Omnichannel Agent Security Role to every member of your team
  - Create a Health Bot User for your team in Dynamics 365
  - Configure an Omnichannel messaging queue for your Health Bot
  - Create a Health Bot routing rule for the Default messaging queue
  - Create a Chat Widget for the patient portal

- Embed the Health Bot in the Lamna Healthcare Patient Portal
  - Use your Chat Widget code to modify the value for the Customer Self-Service Content Snippet in the Portal Management App

- Design an Azure Health Bot **triage and self-schedule** custom scenario for patients with anxiety. Your Health Bot scenario should flow as follows. See the below diagram for a visual of the process.
  - Welcome message to the patient
  - Prompt the patient if they are feeling anxious
    - If they say no, thank them for using the bot
    - If they say yes, prompt if they would like to schedule an appointment or request a callback
  - Using the response variable when a user is feeling anxious, branch into the following scenarios:
    - If they want to schedule an appointment, show a confirmation statement to thank them and supply a button directing the patient to the appointment scheduling page in your portal: https://[YOUR PORTAL].powerappsportals.com/schedule-landing/
    - If they want a callback, show an adaptive card message for the patient to input their name and phone number for a callback. The adaptive card json can be found in the appendix.
      - Respond with a confirmation statement to repeat back the patient's information and thank them for using the service.

- Design an Azure Health Bot **welcome** custom scenario.
  - Include a single step to begin the triage and self-schedule custom scenario.
  - Set this scenario as the automatic welcome scenario.

Here is an example of what your Health Bot **triage and self-schedule** scenario could look like:



# Success Criteria

Demonstrate a working Azure Health Bot to your coach that can be launched from the Lamna Healthcare Patient Portal in your assigned Microsoft Cloud for Healthcare environment. This Azure Health Bot should be capable of fulfilling all the conversational directions, including the callback trigger scenario and the patient self-scheduling link request scenario.

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