



Microsoft Cloud for Healthcare **Industry Labs**

Lab 01: Care Management

Step-by-Step Lab

September 2021

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Overview

Learning Objectives

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

- Create a new location record for Lamna Healthcare Company
- Import healthcare data for the Atkins family
- Navigate the Care Management application

Prerequisites

- Download **Demo Data Import.zip** file from training resources in GitHub

Care Management Application

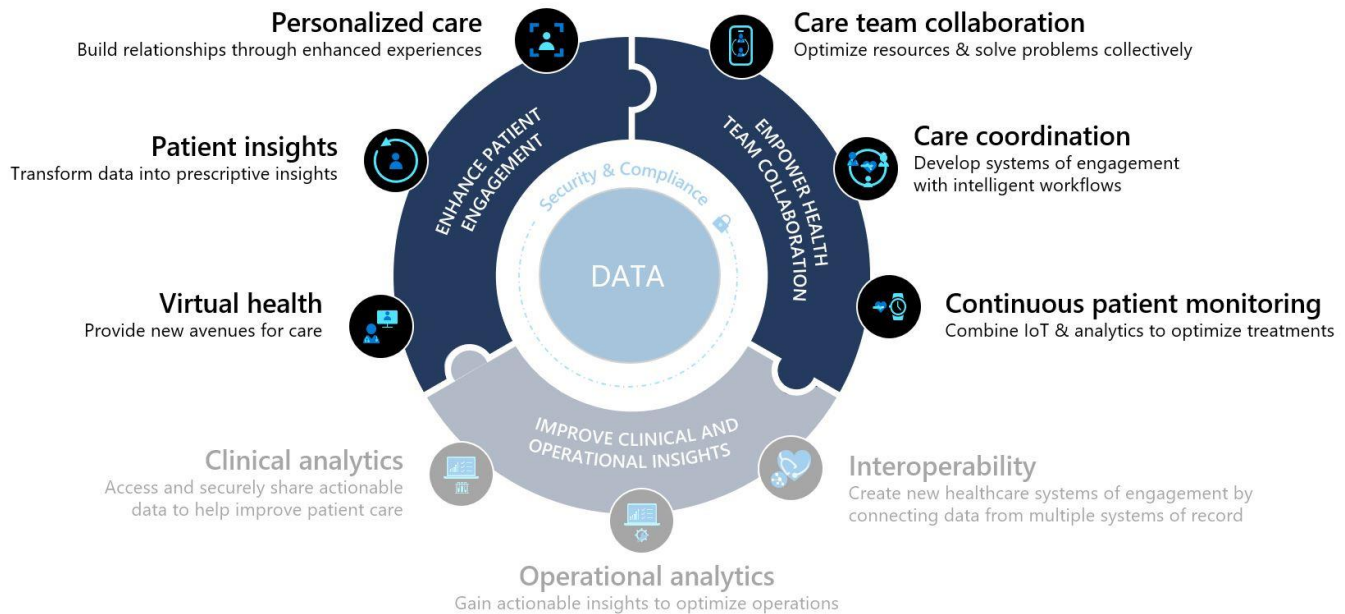
The **Care Management** application allows healthcare systems to provide coordinated care to each patient by quickly communicating the right information, at the right time, to the right people. Users can easily create, personalize, and enable new care plans for patients, manage care teams, and view patients' clinical timelines and care insights right within the application.

Key capabilities for Care Management include the following:

- **Care team:** View and collaborate with care teams to provide the best care for the patient.
- **Care plan:** Create and assign care plans and automate adherence to improve care coordination for your patients.
- **Clinical timeline:** Concise, sequential, and interactive view of patient's clinical occurrences.
- **Virtual clinic:** Provide your care team members the ability to perform virtual appointments with patients.

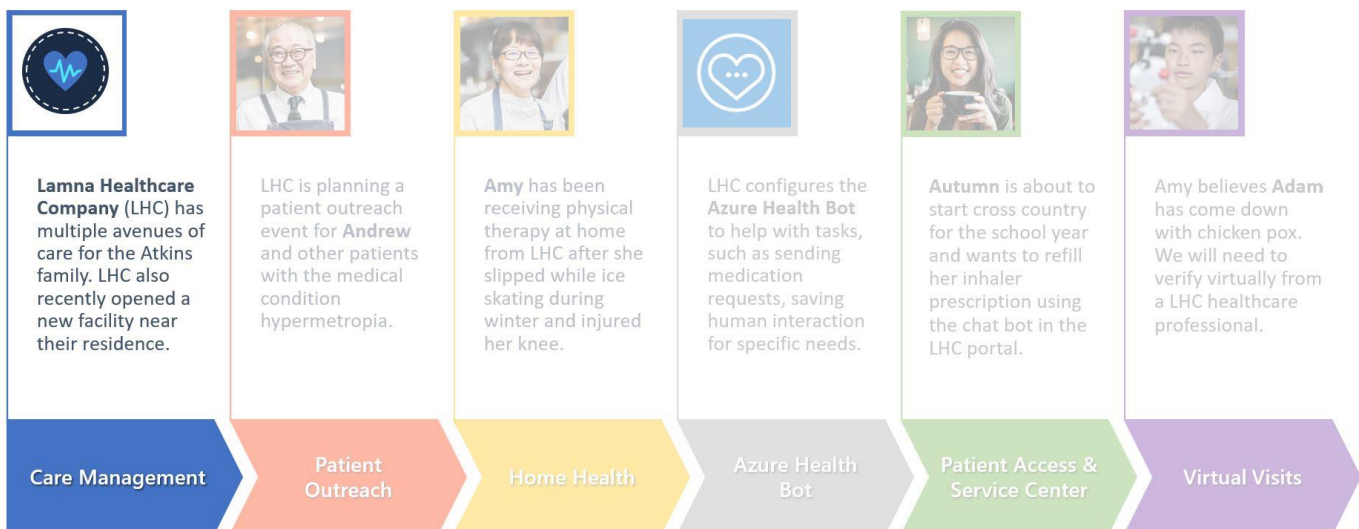
Industry Prioritized Scenarios

Care Management focuses on both **Enhance patient engagement** and **Empower health team collaboration** priority scenarios. It creates a system that allows for enhanced care team collaboration and coordination, virtual care options, and a 360 view of patient healthcare data including patient insights.



Atkins Family Healthcare Story

This lab will focus on the story of Lamna Healthcare Company, who is opening a new location near the Atkins' Family residence in Redmond, WA.

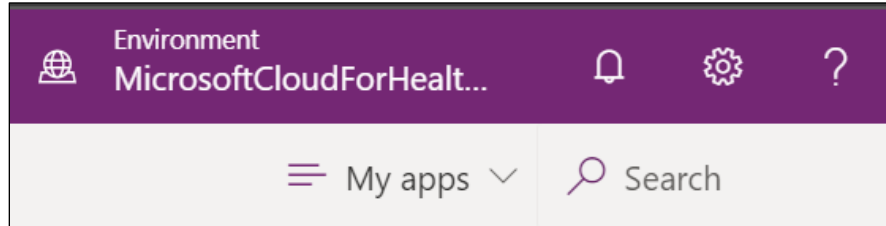


Now that Lamna Healthcare Company's new location is ready to open, we need to ensure the new location record is in the system and the new branch has all the necessary patient information imported. Then we will explore the application to get familiar with the data structure and application features.

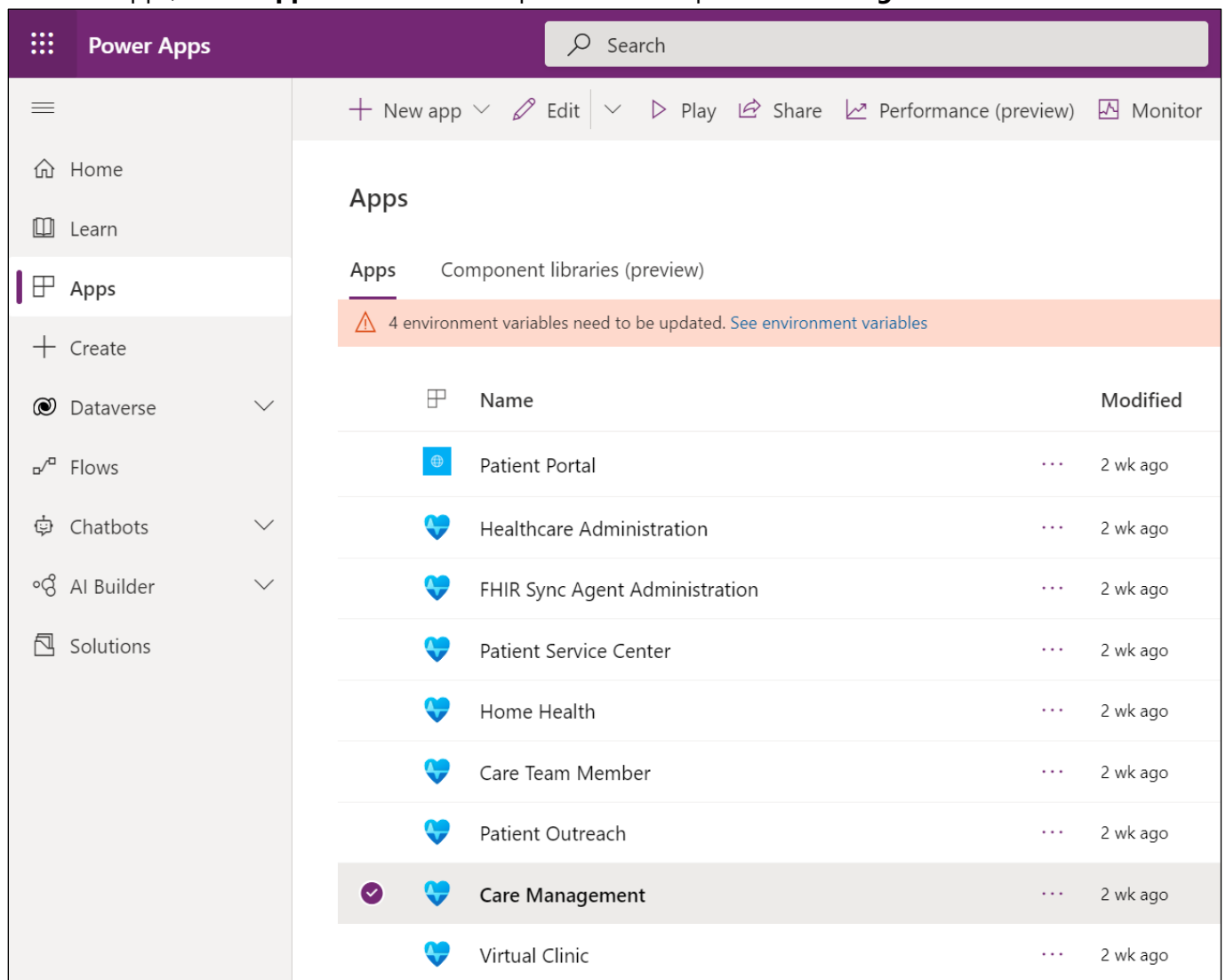
Exercise 1: Create a New Location

In this exercise, you will be creating a new Location record for the **Lamna Healthcare Company** Organization. They have opened a new branch in **Redmond, WA** and we need to ensure this location is in the system.

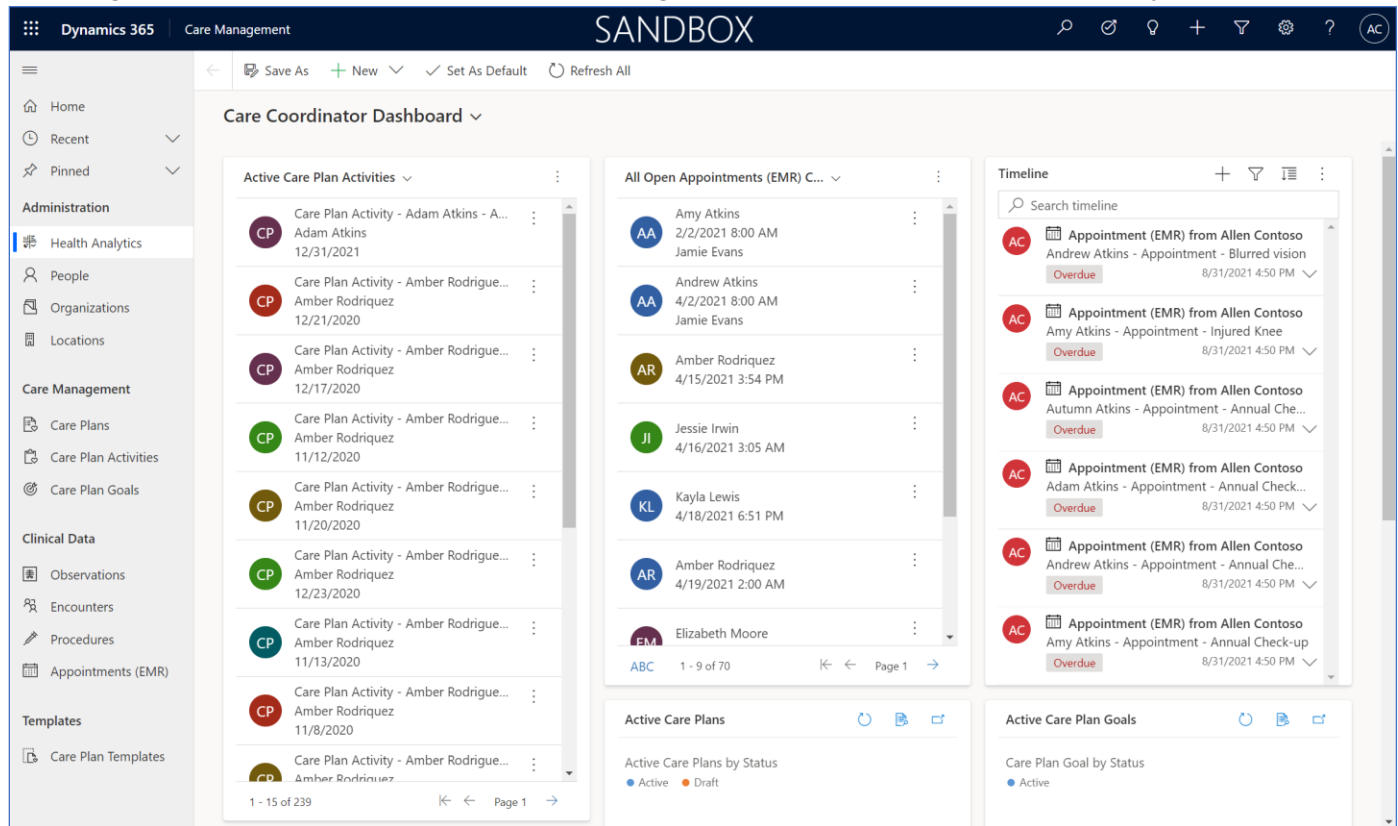
1. Navigate to [Power Apps](#) in an In-Private or Incognito window.
2. Select the proper **Environment** in the upper right.



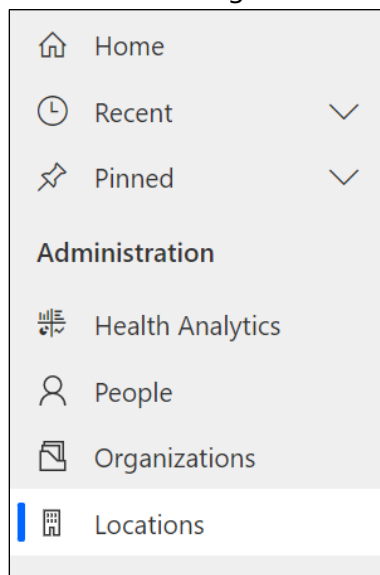
3. In Power Apps, select **Apps** in the left sitemap. Select and open **Care Management**.



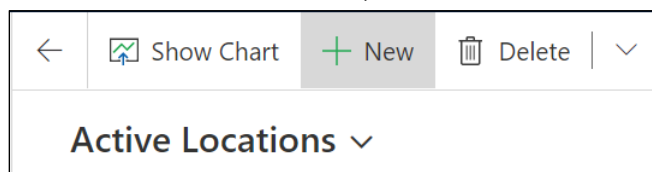
4. You should be landed in the **Health Analytics** section showing the **Care Coordinator Dashboard**. This is a helpful tool for care coordinators to get a complete view of their healthcare organization data, including care plans, care plan activities, care plan goals, appointments (EMR), and activity timeline.



5. In the Care Management sitemap on the left, select **Locations**.



6. In the Active Locations view, select **+ New**.



7. Fill in the following information for the new location:
 - a. **Name:** Lamna Healthcare – Redmond, WA
 - b. **Address City:** Redmond
 - c. **Address State:** WA
 - d. **Managing Organization:** Lamna Healthcare Company

New Location																																									
General																																									
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">Name</td> <td style="width: 10%;">*</td> <td style="width: 70%;">Lamna Healthcare – Redmond, WA</td> </tr> <tr> <td>Address City</td> <td></td> <td>Redmond</td> </tr> <tr> <td>Address Country</td> <td></td> <td>---</td> </tr> <tr> <td>Address Distinct</td> <td></td> <td>---</td> </tr> <tr> <td>Address Period End</td> <td></td> <td>--- </td> </tr> <tr> <td>Address Period Start</td> <td></td> <td>--- </td> </tr> <tr> <td>Address Postal Code</td> <td></td> <td>---</td> </tr> <tr> <td>Address State</td> <td></td> <td>WA</td> </tr> </table>	Name	*	Lamna Healthcare – Redmond, WA	Address City		Redmond	Address Country		---	Address Distinct		---	Address Period End		---	Address Period Start		---	Address Postal Code		---	Address State		WA	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 60%;">Alias 1</td> <td style="width: 40%;">---</td> </tr> <tr> <td>Alias 2</td> <td>---</td> </tr> <tr> <td>Alias 3</td> <td>---</td> </tr> <tr> <td>Description</td> <td>---</td> </tr> <tr> <td>Location Number</td> <td>---</td> </tr> <tr> <td>Managing Organization</td> <td> Lamna Healthcare Company</td> </tr> <tr> <td>Operational Status</td> <td>---</td> </tr> <tr> <td>Mode</td> <td>---</td> </tr> </table>	Alias 1	---	Alias 2	---	Alias 3	---	Description	---	Location Number	---	Managing Organization	Lamna Healthcare Company	Operational Status	---	Mode	---
Name	*	Lamna Healthcare – Redmond, WA																																							
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Mode	---																																								

8. Click **Save & Close**. Now let's see the new location in the Managing Organization record.
9. In the sitemap on the left, select **Organizations**.

Home

Recent
▼

Pinned
▼

Administration

Health Analytics

People

Organizations

Locations

10. Change the grid view in the drop-down from "My Active Accounts" to "**Active Accounts**".

The screenshot shows the Dynamics 365 interface. On the left is a sidebar with navigation options: Home, Recent, Pinned, Administration, Health Analytics, People, Organizations (selected), Locations, Care Management, and Clinical Data. On the right, the 'My Active Accounts' dropdown menu is open, displaying a list of system views. The views listed are: My Active Accounts, Accounts Being Followed, Accounts I Follow, Accounts: Influenced Deals That We Won, Accounts: No Campaign Activities in Last 3 Months, Accounts: Responded to Campaigns in Last 6 Months, Active Accounts (highlighted), All Accounts, Excluded Accounts Campaigns, Inactive Accounts, My Connections, Selected Accounts Campaigns, and Service Account.

11. Once in the **Active Accounts** view, select the **Lamna Healthcare Company** Organization record.

Active Accounts ▾					
Search this view 🔍					
✓	Account Name ↑ ▾	Main Phone ▾	Address 1: City ▾	Primary Contact ▾	Email (Primary Contact) ▾
	Butler Household	555-555-0102	---	Madison Butler	Madison.Butler@contoso.com
	Contoso, Ltd.	417-547-4423	Stark City	---	---
	Endoscopy and Surgicenter	---	Elma	---	---
	Endoscopy Center	---	Bayamon	---	---
	Eye Care Surgery Center	---	Glen Easton	---	---
	Fabrikam Inc	423-555-0100	Loyal	---	---
	Humongous Insurance	423-555-0100	Middlefield	---	---
	Irwin Household	555-555-0100	---	Jessie Irwin	Jessie.Irwin@contoso.com
	Jensen Household	555-555-0101	---	Casey Jensen	Casey.Jensen@contoso.com
✓	Lamna Healthcare Company	423-555-0100	Elko New Market	---	---
	Moore Houshold	555-555-0105	---	Elizabeth Moore	Elizabeth.Moore@contoso.com

12. Select the **Related** tab and then scroll down to select **Locations**.

The screenshot shows the 'Lamna Healthcare Company' account page. The 'Related' tab is selected, and a dropdown menu is open, highlighting the 'Locations' option. The 'ACCOUNT INFORMATION' section on the left lists details for the company, including its name, phone number (423-555-0100), and website. The 'Timeline' section on the right shows a list of events, including 'Appointment Review' and 'Procedure Requests'.

ACCOUNT INFORMATION

Field	Value
Account Name	Lamna Healthcare Company
Phone	423-555-0100
Fax	---
Website	---
Parent Account	---
Ticker Symbol	---

Related

- Locations
- Medication Requests
- Medication Requests
- Medication Requests
- Practitioner Roles
- Procedure Requests
- Procedure Requests
- Procedure Requests
- Referral Requests
- Referral Requests
- Referral Requests
- Medications

13. You will see the newly created **Lamna Healthcare – Redmond, WA** location associated to the record.

The screenshot shows the 'Lamna Healthcare Company' account page with the 'Locations' tab selected. The 'Location Associated View' table displays a list of locations, including 'Contoso Pharmaceuticals', 'Fabrikam Residences', and 'Lamna Healthcare – Redmond, WA'. The table columns include Name, Created On, Physical Type, Address Use, Address State, Address Period, Address City, and Type.

Location Associated View

Name	Created On	Physical Type	Address Use	Address State	Address Period	Address City	Type
Contoso Pharmaceuticals	8/19/2021 3:46 PM	---	Home	PA	9/28/2020 5:2...	Ringtown	---
Fabrikam Residences	8/19/2021 3:46 PM	---	Home	IL	9/28/2020 5:2...	Galesburg	---
Lamna Healthcare – Redmond, WA	9/14/2021 4:50 PM	---	---	WA	---	Redmond	---

Congratulations! You created a new location in Redmond, WA for Lamna Healthcare Company using the Care Management application.

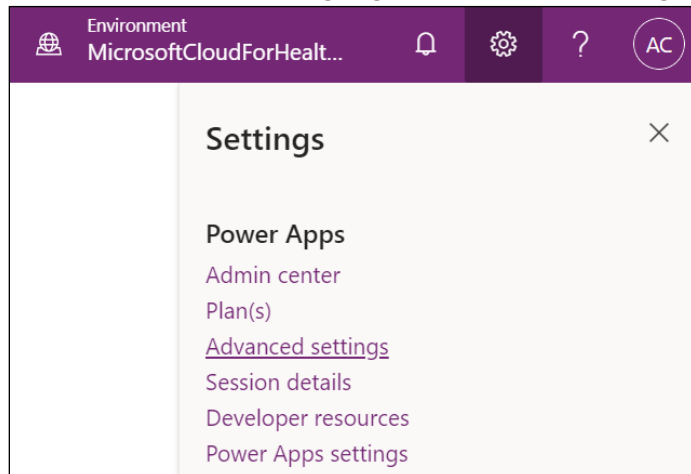
Exercise 2: Import Healthcare Data

In this exercise, you will import the necessary healthcare data pertaining to the Atkins family, who is transferring to the new Lamna Healthcare Company location branch in Redmond, WA.

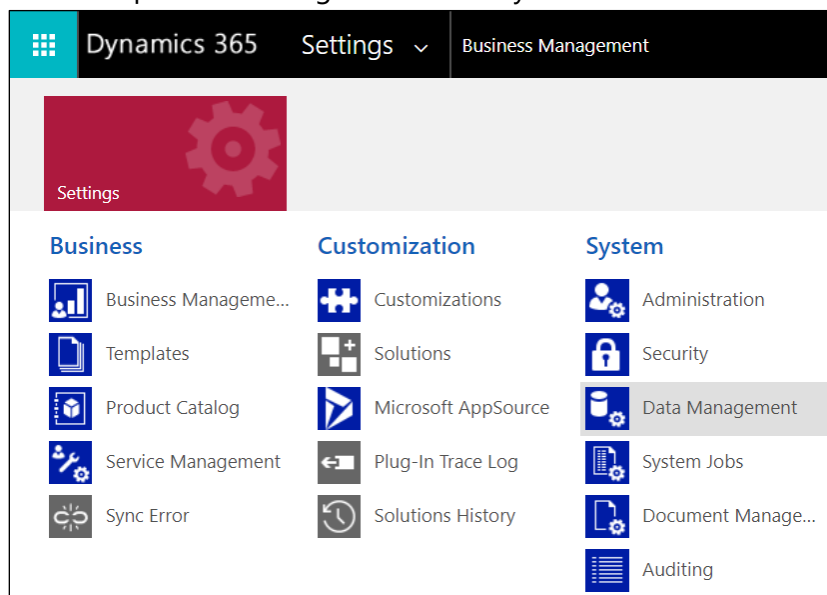
Healthcare data is sensitive and resides in a secure location. Frequently, healthcare organizations will use an Electronic Health Record (EHR) vendor to store their data and use data models based on the Fast Healthcare Interoperability Resources (FHIR) standards framework. In this structure, you can synchronize this data into Dataverse using Azure Healthcare APIs. We will not demonstrate this concept in this lab as it requires Azure API for FHIR. You can learn more about the topic on [Microsoft Docs](#).

For this lab, we have supplied the necessary Atkins family healthcare data in a zip file for you to import. You can find the zip file in the training resources. The **Demo Data Import.zip** file contains multiple csv files corresponding to various healthcare entities. This exercise will walk you through the process to import the zip file and match the metadata to the associated entities and fields.

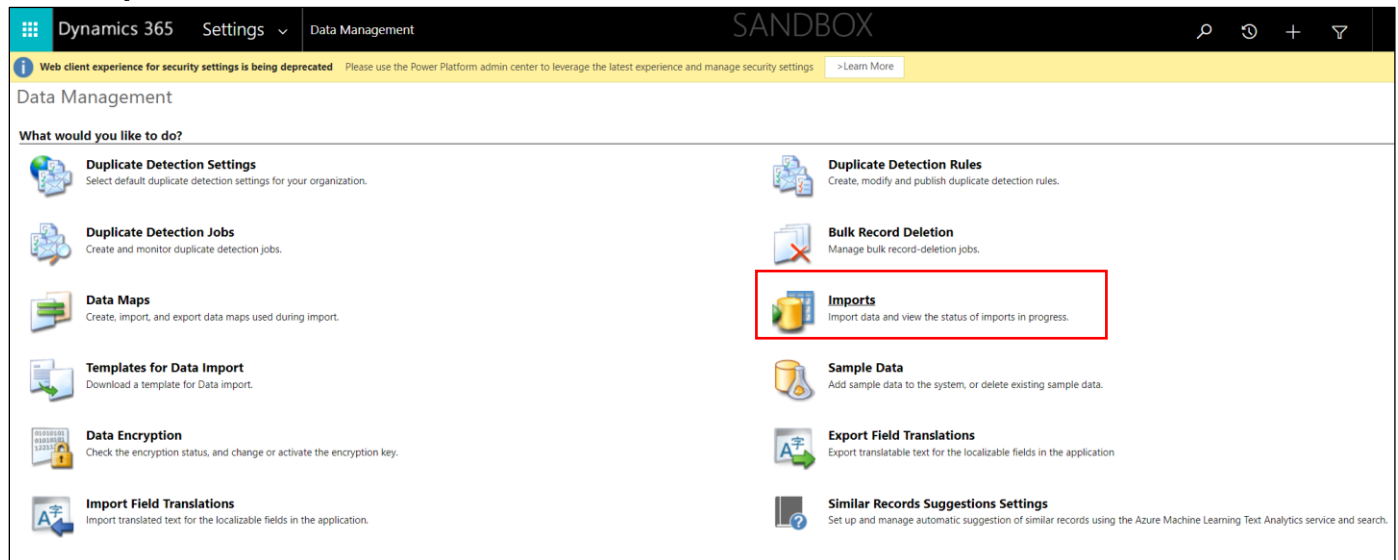
1. Once you have downloaded the necessary zip file, navigate to [Power Apps](#).
2. In Power Apps, click the gauge icon in the upper right. Select **Advanced Settings** in the Settings menu.



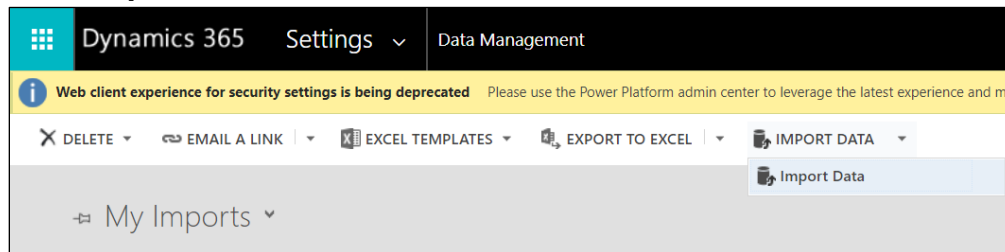
3. This will open the Settings window in Dynamics 365. From **Settings**, select **Data Management**.



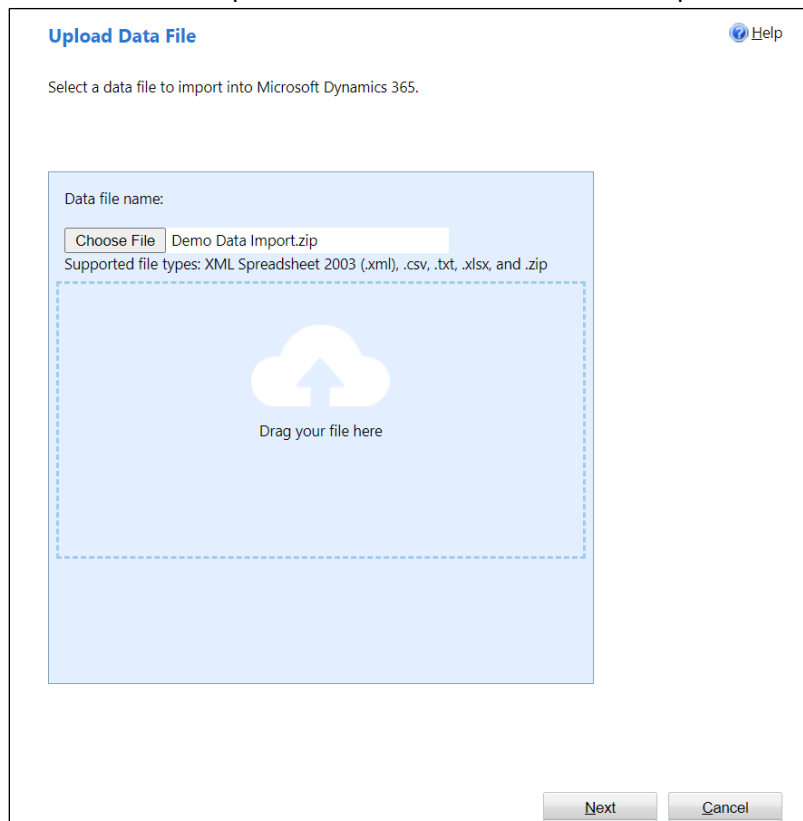
4. Go to **Imports**.



5. Select **Import Data** on the command bar.



6. Click **Choose File**. Select the file "**Demo Data Import.zip**" which you downloaded from the training resources. This zip file contains all the entities to import in csv file format. Click **Next**.



7. On the Review File Upload Summary, it will show the list of files to import. Click **Next**.

Review File Upload Summary

Help

The following data will be imported into Microsoft Dynamics 365.

16 files found in the Demo Data Import.zip file.

File Name	Size
Account.csv	1 KB
Allergy Intolerance.csv	1 KB
Appointment (EMR).csv	2 KB
Care Plan Activity Goal.csv	2 KB
Care Plan Activity.csv	2 KB
Care Plan Goal.csv	2 KB
Care Plan.csv	2 KB
Care Team Participant.csv	2 KB
Care Team.csv	2 KB
Condition.csv	1 KB
Contact.csv	2 KB
Encounter.csv	2 KB
Episode of Care.csv	1 KB
Goal.csv	1 KB
Medication Request.csv	1 KB
Related Person.csv	1 KB

► Delimiter Settings

Back

Next

Cancel

8. On the Select Data Map screen, select **Default** (Automatic Mapping). Click **Next**.

Select Data Map

Help

Before your data can be imported, it must be mapped to the data in Microsoft Dynamics 365. You can let the system map your data automatically, or you can select a data map to specify how your data will be imported.

System Data Maps

Default (Automatic Mapping)

Data Maps for Salesforce.com

For Full Data Export

For Report Export

Data Maps for Microsoft Outlook Business Contact Manager

For BCM 2010

Back

Next


Cancel

















9. On the Map Record Types screen, you will map the source data file name to the Dynamics record type in the system. Select the **Record Type** that matches the source data file name for each unmapped pair.

*Note: Goal may auto map to the INCORRECT entity. For the **Goal** record type, open the mapping drop-down and select the **first Goal** entry in the list.*

Map Record Types [Help](#)

Map the source data files to the target Microsoft Dynamics 365 record types. If a source file cannot be mapped to an existing record type, you can create a new record type or choose to skip importing the data.

 Some data files are not mapped. Please map them to Microsoft Dynamics 365 record types to continue.


Source Data Files	Microsoft Dynamics 365 Record Types
 Account	Account
 Allergy Intolerance	Not Mapped
 Appointment (EMR)	Not Mapped
 Care Plan Activity Goal	Not Mapped
 Care Plan Activity	Not Mapped
 Care Plan Goal	Not Mapped
 Care Plan	Not Mapped
 Care Team Participant	Not Mapped
 Care Team	Not Mapped
 Condition	Not Mapped
 Contact	Contact
 Encounter	Not Mapped
 Episode of Care	Not Mapped
 Goal	Goal
 Medication Request	Not Mapped
 Related Person	Not Mapped

















[Back](#) [Next](#) [Cancel](#)

10. When complete will all data file entity mappings, click **Next**.

Map Record Types [Help](#)

Map the source data files to the target Microsoft Dynamics 365 record types. If a source file cannot be mapped to an existing record type, you can create a new record type or choose to skip importing the data.

 The data files have been successfully mapped to the target Microsoft Dynamics 365 record types.

Source Data Files	Microsoft Dynamics 365 Record Types
 Account	Account
 Allergy Intolerance	Allergy Intolerance
 Appointment (EMR)	Appointment (EMR)
 Care Plan Activity Goal	Care Plan Activity Goal
 Care Plan Activity	Care Plan Activity
 Care Plan Goal	Care Plan Goal
 Care Plan	Care Plan
 Care Team Participant	Care Team Participant
 Care Team	Care Team
 Condition	Condition
 Contact	Contact
 Encounter	Encounter
 Episode of Care	Episode of Care
 Goal	Goal
 Medication Request	Medication Request
 Related Person	Related Person

[Back](#) [Next](#) [Cancel](#)

11. On the Map Fields screen, select any Dynamics record type that shows a warning symbol to **map the remaining fields** which the system could not map automatically.

*Note: For the Account record type, choose the **first Primary Contact (Lookup)**. For Care Plan Goal and Encounter, you must fix the status in the required field section near the top of the section.*

Map Fields [Help](#)

Select the Microsoft Dynamics 365 record type and map each source field to a target Microsoft Dynamics 365 field. We suggest that you map all the required fields before you click Next.

Map the unmapped fields, and then continue.

Dynamics 365 Record Types	Source Fields	Dynamics 365 Show All
Account	Required Fields	
Allergy Intolerance	Account Name	Account Name
Appointment (EMR)	Optional Fields	
Care Plan	Main Phone	Main Phone
Care Plan Activity	Primary Contact	Primary Contact (Lookup)
Care Plan Activity Goal	Lookup reference for field Primary Contact	
Care Plan Goal	Related Record Type: Referred Field:	
Care Team	<input checked="" type="checkbox"/> Contact Full Name	
Care Team Participant	OK Cancel	
Condition		
Contact		
Encounter		
Episode of Care		
Goal		
Medication Request		
Related Person		

Back Next Cancel

12. Complete the data schema mapping for all the remaining unmapped fields.

Map Fields [Help](#)

Select the Microsoft Dynamics 365 record type and map each source field to a target Microsoft Dynamics 365 field. We suggest that you map all the required fields before you click Next.

Map the unmapped fields, and then continue.

Dynamics 365 Record Types	Source Fields	Dynamics 365 Show All
Account	Required Fields	
Allergy Intolerance	Care Plan	Care Plan (Lookup)
Appointment (EMR)	Description	Description
Care Plan	Goal	Goal (Lookup)
Care Plan Activity	Status (Option Set)	Status (Option Set)
Care Plan Activity Goal	Optional Fields	
Care Team	Due Date	Due Date
Care Team Participant		
Condition		
Contact		
Encounter		
Episode of Care		
Goal		
Medication Request		
Related Person		

Back Next Cancel

13. Once you have completed mapping the fields, select **Next**.

Map FieldsHelp

Select the Microsoft Dynamics 365 record type and map each source field to a target Microsoft Dynamics 365 field. We suggest that you map all the required fields before you click Next.

✔ All the record types with fields have been successfully mapped.

Dynamics 365 Record Types	Source Fields	Dynamics 365 Fields
✔ Account		
✔ Allergy Intolerance		
✔ Appointment (EMR)		
✔ Care Plan		
✔ Care Plan Activity		
✔ Care Plan Activity Goal		
✔ Care Plan Goal		
✔ Care Team		
✔ Care Team Participant		
✔ Condition		
✔ Contact		
✔ Encounter		
✔ Episode of Care		
✔ Goal		
✔ Medication Request		
✔ Related Person		

Required Fields

Active	Active (Two Options)
Name	Name
Patient	Patient (Lookup)
Related Person	Name (Lookup)

Back Next Cancel

14. You may receive a pop-up error message that some required fields are not mapped. If you have mapped all the fields, disregard this warning, and click **OK** to continue.

microsoftcloudforhealthcare.crm.dynamics.com says

Some required fields are not mapped. This might result in some records not being imported.

OK Cancel

15. On the Review Mapping Summary screen, it should show a green check mark next to each entity. This means the data is ready for import. Click **Next**.

Review Mapping Summary

Help

The data from the source files has been successfully mapped to the target record types and fields in Microsoft Dynamics 365. The data is ready to import.

Source Data Files	Microsoft Dynamics 365 Record Types
✓ Account.csv	Account
✓ Allergy Intolerance.csv	Allergy Intolerance
✓ Appointment (EMR).csv	Appointment (EMR)
✓ Care Plan Activity Goal.csv	Care Plan Activity Goal
✓ Care Plan Activity.csv	Care Plan Activity
✓ Care Plan Goal.csv	Care Plan Goal
✓ Care Plan.csv	Care Plan
✓ Care Team Participant.csv	Care Team Participant
✓ Care Team.csv	Care Team
✓ Condition.csv	Condition
✓ Contact.csv	Contact
✓ Encounter.csv	Encounter
✓ Episode of Care.csv	Episode of Care
✓ Goal.csv	Goal
✓ Medication Request.csv	Medication Request
✓ Related Person.csv	Related Person

⚠ Data in any record types or fields that are set to Ignore will not be imported. To view or change the record type and field mappings, click Edit.

Edit

Back

Next

Cancel

16. On the Review Settings and Import Data screen, ensure **Allow Duplicates** is set to **No**. If desired, set a Data Map Name to save for future imports. Then click **Submit**.

Review Settings and Import Data

Help

Review the default settings, make the necessary changes, and submit the data for import.


Allow Duplicates


☒ No

☐ Yes

Duplicate records will be determined based on the duplicate detection settings in Microsoft Dynamics 365.

Select Owner for Imported Records

 Allen Contoso



This user will own the imported records if the records do not contain owner information or if the records cannot be assigned to the specified owners.

Data Map Name (optional)

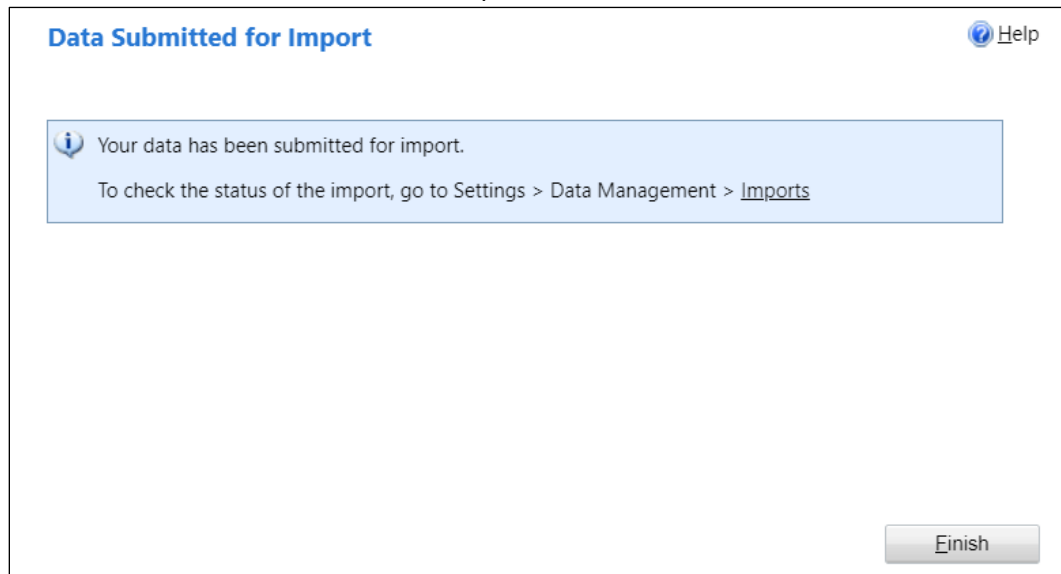
Save this data map for future imports.

Back

Submit

Cancel

17. Your data has been submitted for import. You can click Finish.



18. To review the import progress and verify data imported successfully, go back to **Settings > Data Management > Imports**. Once the import is complete, the **My Imports** view should show the table with all **Status Reason** as **Completed** for all rows and no Partial Failures or Errors in the table.

The screenshot shows the Dynamics 365 interface with the "My Imports" view. The table lists 16 import records, all with a status of "Completed". The columns are: Import Name, Status Reason, Successes, Partial Failures, Errors, Total Progress, Created On, and Created By.

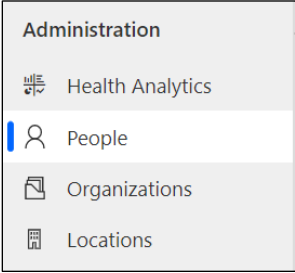
<input type="checkbox"/>	Import Name	Status Reason	Successes	Partial Failures	Errors	Total Progress	Created On	Created By
<input type="checkbox"/>	Demo Data Import.zip (Account.csv)	Completed	1	0	0	1	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Allergy Intolerance....)	Completed	4	0	0	4	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Appointment (EMR)...	Completed	6	0	0	6	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Care Plan Activity G...	Completed	7	0	0	7	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Care Plan Activity.csv)	Completed	7	0	0	7	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Care Plan Goal.csv)	Completed	7	0	0	7	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Care Plan.csv)	Completed	6	0	0	6	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Care Team Participa...	Completed	14	0	0	14	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Care Team.csv)	Completed	6	0	0	6	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Condition.csv)	Completed	3	0	0	3	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Contact.csv)	Completed	4	0	0	4	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Encounter.csv)	Completed	6	0	0	6	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Episode of Care.csv)	Completed	6	0	0	6	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Goal.csv)	Completed	7	0	0	7	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Medication Request...	Completed	3	0	0	3	8/31/2021 4:...	Allen Contoso
<input type="checkbox"/>	Demo Data Import.zip (Related Person.csv)	Completed	12	0	0	12	8/31/2021 4:...	Allen Contoso

Congratulations! You have successfully imported the necessary Atkins family healthcare information that the new Lamna Healthcare Company branch location will use to provide proper care.

Exercise 3: Navigate Care Management Features

In this exercise, you will navigate the patient record of one of the Contacts that you imported in the previous exercise. In this case, we will examine the healthcare information of Amy Atkins to see how a care team member would obtain a full view of the patient.

- 1. Navigate to the Care Management application and select **People** on the Site Map.



- 2. Find and select **Amy Atkins** from the Active Patients view. Open the record by double clicking or selecting Edit in the command bar.

<div><div>Show Chart</div><div>Edit</div><div>Delete</div><div>Merge</div><div>Change Password</div><div>Geo Code</div><div>Assign</div><div>Share</div><div>Lists and segments</div><div>Email a Link</div><div>Follow</div></div>							
Active Patients							
Group By: (no grouping)							
<input checked="" type="checkbox"/>	Date of Birth	Full Name	Gender	Deprecated - Medical Record Num...	Emergency Contact Name	Primary Practitioner	Mobile Phone
	7/7/2011	Adam Atkins	Male	MRN7835-4571	---	Jamie Evans	425-555-0195
	11/15/1965	Amber Rodriguez	Male	MRN2631-2120	Kai Carter	Jamie Evans	555-555-0100
<input checked="" type="checkbox"/>	2/20/1970	Amy Atkins	Female	MRN7835-4569	---	Jamie Evans	425-555-0197
	3/15/1965	Andrew Atkins	Male	MRN7835-4568	---	Jamie Evans	425-555-0198
	10/10/2005	Autumn Atkins	Female	MRN7835-4570	---	Jamie Evans	425-555-0196

- 3. Take a moment to examine the **Summary** tab on Amy's patient record. On this tab, the care team member will have a full view of Amy's primary **information**, **relationships**, healthcare **details**, and patient **interactions**.

AA

Amy Atkins

Contact · Patient

2/20/1970

Date of Birth

Business Phone

Amy.Atkins@contoso.com

Email

Allen Contoso

Owner

Summary

Clinical Timeline

Care Team

Care Plan

Home Care

Related

Patient Information

Contact Type*

Patient

First Name*

Amy

Last Name*

Atkins

Primary Practitioner

Jamie Evans

Household

Atkins Household

Email

Amy.Atkins@contoso.com

Home Phone

425-555-0199

Mobile Phone

425-555-0197

Business Phone

Medical Identifiers

Identifier

Type

No data available.

Patient Relationships

Name

Mobile Phone (Name)

Email (Name)

Andrew Atkins

425-555-0198

Andrew.Atkins@contoso.com

Autumn Atkins

425-555-0196

Autumn.Atkins@contoso.com

Adam Atkins

425-555-0195

Adam.Atkins@contoso.com

Patient Details

Conditions

Amy Atkins - Knee Sprain 2021

Amy Atkins

4. In the **Patient Information** section, notice that the **Contact Type** field is **Patient**. The healthcare data model uses the contact entity from the Common Data Model and defines the type of contact as patient, practitioner, or related person. This determines the type of form shown. Here we see the patient form.

AA

Amy Atkins

Contact · Patient

Summary

Clinical Timeline

Care Team

Patient Information

Contact Type*

Patient

5. In the **Patient Relationships** section, you can see the rest of the Atkins family is listed since they are linked as related persons in the system.

Patient Relationships

✓

Name

Mobile Phone (Name)

Email (Name)

Andrew Atkins

425-555-0198

Andrew.Atk

Autumn Atkins

425-555-0196

Autumn.Atk

Adam Atkins

425-555-0195

Adam.Atkir

6. In the **Patient Details** section, you can cycle through the various icons to see different medical details including **conditions**, **medication requests**, **appointments (EMR)**, **procedures**, **allergy intolerances**, **claims**, and **coverages**. This is a simple and efficient way to observe patient healthcare details.

Patient Details

Conditions

Select

AA

Amy Atkins - Knee Sprain 2021

Amy Atkins

Heart

Document

Calendar

Pencil

Leaf

Box

Umbrella

7. If you scroll down on the page, you will see the **Patient Interactions** section. This shows any activity, note, or post and can be filtered or sorted.

Patient Interactions

Timeline

+

▼

≡

⋮

🔍

Search timeline

✎

Enter a note...

📎

AC

📅

Appointment (EMR) from Allen Contoso

Amy Atkins - Appointment - Injured Knee

Overdue

8/31/2021 4:50 PM

▼

AC

📅

Appointment (EMR) from Allen Contoso

Amy Atkins - Appointment - Annual Check-up

Overdue

8/31/2021 4:50 PM

▼

🗣️

🔧

Auto-post on Amy Atkins

Contact: Created By Allen Contoso.

8/31/2021 4:50 PM

▼

8. Select the **Clinical Timeline** tab. On this tab, a care team member will be able to view a weekly calendar of the patient's clinical information as well as a list of any upcoming or previous events.

AA

Amy Atkins
Contact · Patient ▼

2/20/1970
Date of Birth

Business Phone

Amy.Atkins@contoso.com
Email

Allen Contoso
Owner

▼

Summary

Clinical Timeline

Care Team

Care Plan

Related

Patient Clinical Timeline

📅

Today

←

→

September 12, 2021 - September 1...

🔍

All clinical data, Allerg...

+ New

12 Sun

13 Mon

14 Tue

Sep 15 Wed

16 Thu

17 Fri

18 Sat

<

📅

Amy Atkins - Care Plan - Annual Check-up

>

<

📅

Amy Atkins - Care Plan - Knee Injury

>

<

📅

Physical Therapy

>

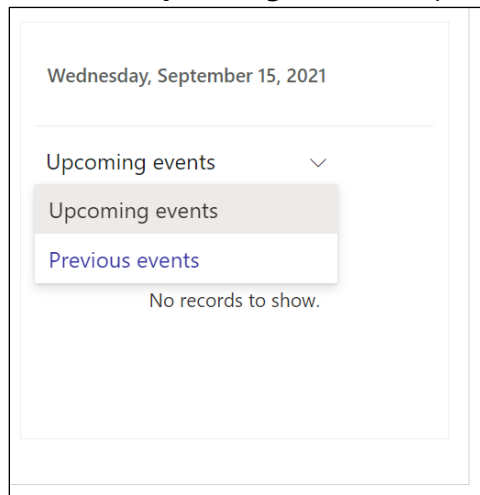
Wednesday, September 15, 2021

Upcoming events

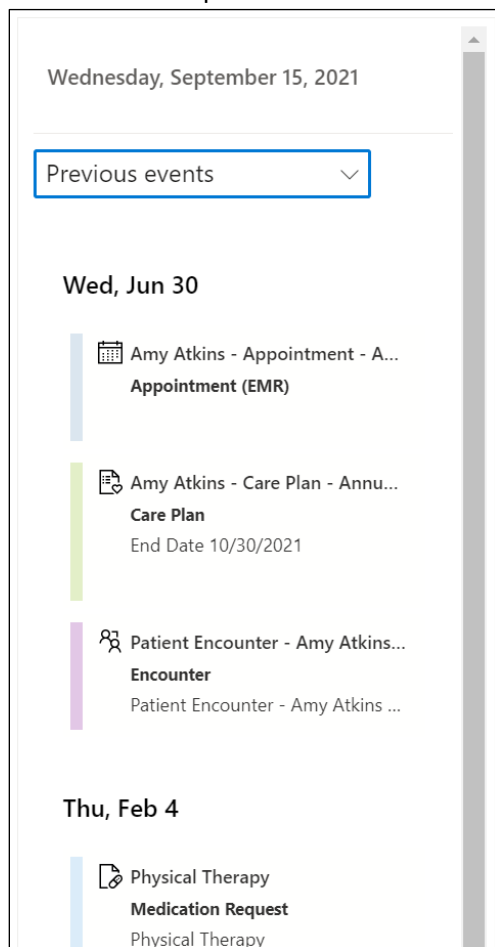
▼

No records to show.

9. Select the **Upcoming events** dropdown in the right pane and switch to **previous events**.



10. See the list of events Amy had previously including Appointments, Care Plans, Encounters, and Medication Requests.



11. Select the **Care Team** tab. On this tab, the care team member can find other members who may be providing care to the patient for any current conditions and care plans.

The screenshot shows the 'Care Team' tab for a patient named Amy Atkins. The page has a header with the patient's name and a dropdown menu. Below the header, there are tabs for 'Summary', 'Clinical Timeline', 'Care Team' (which is selected), 'Care Plan', and 'Related'. The main content area is titled 'Care Teams' and includes a 'Filter By' dropdown set to 'All Care Teams'. There are two columns of care team members. The left column is titled 'Amy Atkins - Care Team - Annual Check-up' and the right column is titled 'Amy Atkins - Care Team - Knee Injury 2021'. Both columns show a 'No status set' button and a 'No condition assigned' message. Below these, there are two members listed: Jamie Evans (Practitioner, No role assigned) and Andrew Atkins (Related Person, No role assigned).

12. Select the **Care Plan** tab. On this tab, the care team member will be able to see a full view of all the Care Plans associated to the patient. This includes a list of their care plan activities and statistics for completed activities and goals. You can create a new care plan or filter by care plan type in this view.

The screenshot shows the 'Care Plan' tab for a patient named Amy Atkins. The page has a header with the patient's name and a dropdown menu. Below the header, there are tabs for 'Summary', 'Clinical Timeline', 'Care Team', 'Care Plan' (which is selected), and 'Related'. The main content area is titled 'CARE PLANS' and includes a 'Filter By' dropdown set to 'Active'. There are three summary cards: 'Assigned Care Plans' (All Time) with a value of 2, 'Activities Complete' (New and Existing Care Plans) with a value of 33%, and 'Goals Complete' (New and Existing Care Plans) with a value of 33%. Below these cards, there is a 'CARE PLANS' section with a '+ New Care Plan' button. At the bottom, there is a 'Care Plan Activities' table with columns for Name, Description, Care Plan, Activity Status, and Activity End Date. The table contains three rows of data.

✓ Name	Description	Care Plan	Activity Status	Activity End Date
Care Plan Activity - Amy Atkins - Annual		Amy Atkins - Care Plan - Annual Check-up	In Progress	12/31/2021
Care Plan Activity - Amy Atkins - Knee Inj		Amy Atkins - Care Plan - Knee Injury	Completed	8/31/2021
Care Plan Activity - Amy Atkins - Knee Inj		Amy Atkins - Care Plan - Knee Injury	In Progress	12/31/2021

13. Finally, select the **Related** tab to see any additional details related to the patient record.

Congratulations! You have explored the Care Management app and its featured data within a patient record.

Summary

Nice work! You have completed **Lab 01 - Care Management**.

In this lab, you learned how to do the following:

- Create a new branch location record associated with an organization
- Import data and understand the healthcare data model further
- Navigate Care Management application and patient records to discover their clinical data including Encounters, Medication Requests, Care Plans, Care Timelines, Care Plan Activities etc.