

Dynamics 365 Healthcare V3 Upgrade Considerations and Data Model Changes

**Version**: 3.0

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# Updates to the data model to support CDS environments

The data structure for the Healthcare Accelerator has been enhanced so that all users can now leverage the data model without having Sales, Field Service or Project Service installed. Because of this change, there have been some changes to the existing data model that need to be considered before upgrading to the latest version. Below is a list of the changes. If any of these impact you, we recommend performing a backup, data extract and migration strategy in order to ensure there is no data loss.

As always, a backup should be performed before any upgrade.

## Product/Medication Entity Changes

Product entity has been replaced with custom Medication entity

|  |  |
| --- | --- |
| Old Fields from Product Entity | New Fields on Medication Entity |
| Form | Form |
| Is Brand | Is Brand |
| Is Over the Counter | Is Over the Counter |
| Medication Code | Medication Code |
| Package Container | Package Container |
| Amount | Amount |
| Code | Code |
| Manufacturer | Manufacturer |
| Medication ID | Medication ID |
| Name | Name |

## Contact Entity Changes (Forms Only)

Physician 360 Form

1. Nav Bar Relationships
   1. Removed everything under the “Marketing” tab
   2. Removed everything under the “Service” tab
   3. Removed everything under the “Sales” tab
2. Field and Tabs
   1. Removed “Originating Lead” field under the “Details” tab
   2. Removed section “RECENT OPPORTUNIES” under the “Summary” tab
   3. Removed section “RECENT CASES” under the “Summary” tab
   4. Removed section “ENTITLEMENTS” under the “Summary” tab
   5. Removed section “Icebreakers” under the “Summary” tab

PHYSICIAN 360 Form

1. Nav Bar Relationships
   1. Removed “Billing Account” under “Common” tab
   2. Removed “Vendor Contact” under “Common” tab
   3. Removed everything under the “Marketing” tab
   4. Removed everything under the “Service” tab
   5. Removed everything under the “Sales” tab
2. Tabs/Fields
   1. Removed “Originating Lead” field under the “Details” tab

## Appointment (EMR) Changes

1. Fields
   1. Status field was previously a lookup and has been changed to an Option Set

## Healthcare Service Available Time Changes

1. Fields
   1. Day of Week has been updated to point to the Days of Week Option Set

## Appointment (EMR) Service Type Changes

1. Service Type Code field updated to lookup to custom Medication entity instead of Product

## Care Plan Activity Changes

1. Product Reference Type updated to lookup to custom Medication entity instead of Product

## Medication Administration Changes

1. Medication Reference updated to lookup to custom Medication entity instead of Product

## Medication Image Changes

1. Medication Identifier updated to lookup to custom Medication entity instead of Product

## Medication Ingredient Changes

1. Ingredient Item Medication updated to lookup to custom Medication entity instead of Product
2. Medication Identifier updated to lookup to custom Medication entity instead of Product

## Medication Package Batch Changes

1. Medication Identifier updated to lookup to custom Medication entity instead of Product

## Medication Package Content Changes

1. Package Item Medication updated to lookup to custom Medication entity instead of Product
2. Medication Identifier updated to lookup to custom Medication entity instead of Product

## Medication Request Changes

1. Medication Reference updated to lookup to custom Medication entity instead of Product

## Procedure Entity Changes

1. Code updated to lookup to custom Medication entity instead of Product

## Procedure Request Changes

1. Procedure Code updated to lookup to custom Medication entity instead of Product

## Procedure Used Reference Changes

1. Ref Medication updated to lookup to custom Medication entity instead of Product

## Schedule Service Type Changes

1. Service Type updated to lookup to custom Medication entity instead of Product

## Slot Changes

1. Service Type updated to lookup to custom Medication entity instead of Product
2. Appointment Type was previously a lookup and has been replaced with a picklist (msemr\_appoinmenttypenew)

## Device Metric Changes

1. Unit is now a lookup to Codeable Concept

## Activity Definition Changes

1. Procedure Code updated to lookup to custom Medication entity instead of Product