



# Microsoft Cloud for Healthcare **Industry Labs**

## Lab 03: Home Health

Step-by-Step Lab

September 2021

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# Overview

## Learning Objectives

In this module, you will do the following:

- Create a Bookable Resource
- Configure the Schedule Board
- Leverage Care Management Components with the Field Service Mobile App

## Prerequisites

- None

## Home Health Application

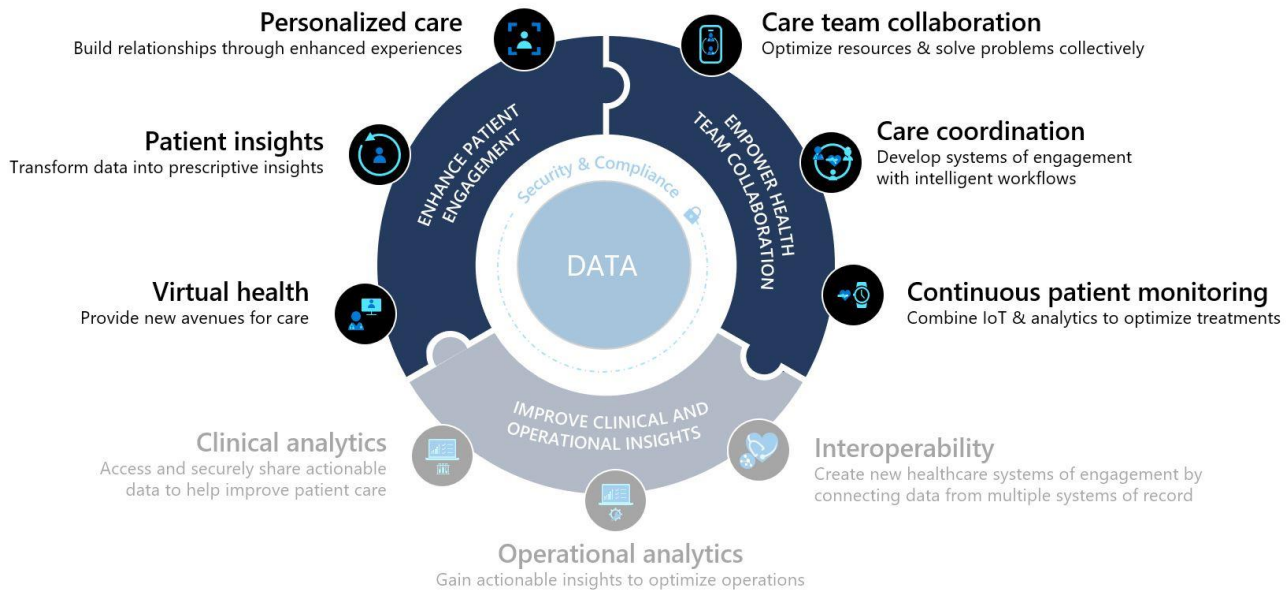
Microsoft Cloud for Healthcare's **Home Health** application allows provider personnel to schedule appointments for the patient based on a variety of factors. It allows for the communication of the right information, at the right time, to the right people, to provide safe and effective care to your patients. Manage home visit schedules, notify patients, and give access to medical information to the provider on the go.

Key capabilities of Home Health include:

- **Schedule home visit:** Enable care coordinators to schedule home visit appointments, while viewing patient information directly in context.
- **Provider scheduling:** View schedules of care team members and optimize visiting routes.
- **Patient engagement:** Notify patients about upcoming appointments, follow up with patients after a visit, and automatically check with patients between visits.
- **Home visit coordination:** Coordinate care and support distinct processes and tasks for the home visit.

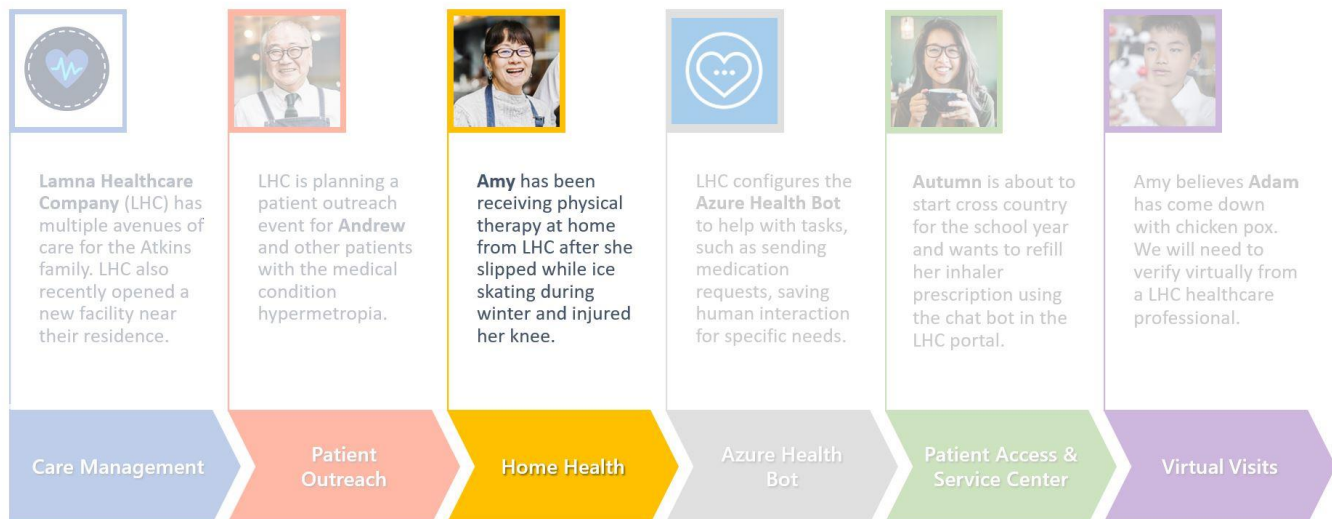
## Industry Prioritized Scenarios

Home Health focuses on both **Empowering health team collaboration** and **Enhance patient engagement** priority scenarios by creating a system that allows for improved care team coordination with optimized resources and enhanced patient engagement with personalized experiences and home visits.



## Atkins Family Healthcare Story

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



Amy sprained her knee while ice skating last winter and was prescribed at-home physical therapy by her practitioner to rehabilitate the injury. To facilitate this home care scenario, Lamna Healthcare Company has deployed Microsoft Cloud for Healthcare's Home Health capabilities.

In this lab, you will play the role of a Lamna Healthcare Company Home Health dispatcher to configure the Home Health application.

# Exercise 1: Create a Bookable Resource

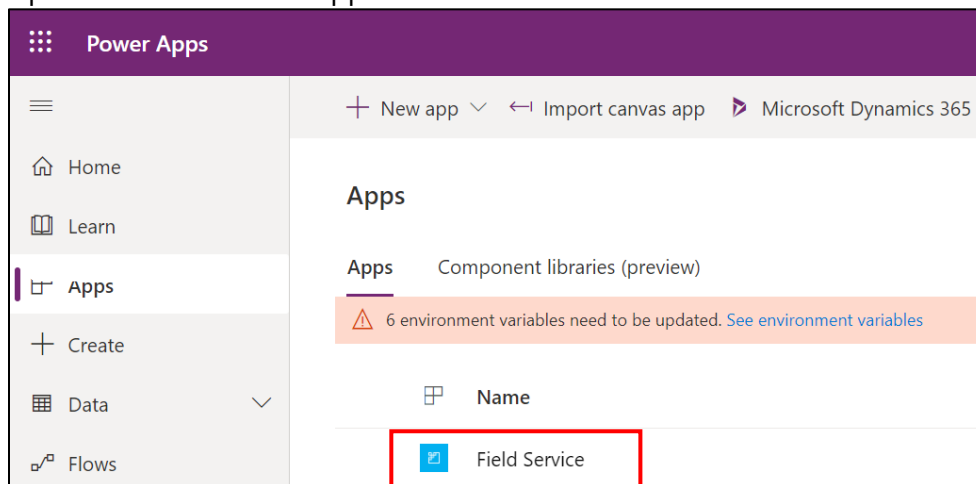
In this exercise, you will learn how to create a **Bookable Resource** to be used for scheduling a Home Health Work Order. A bookable resource in the Microsoft Cloud for Healthcare is anything that needs to be scheduled. This most commonly includes people, equipment, and physical spaces (facilities). Bookable Resources must be created before scheduling a Home Health Work Order.

Each resource can have different attributes that distinguish it from others, including but not limited to the following:

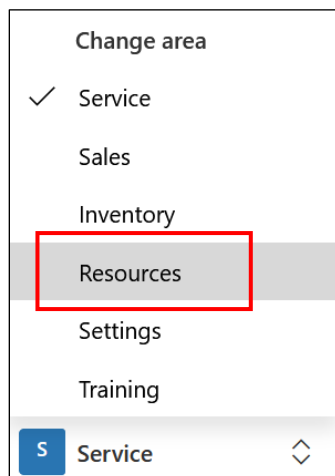
- Characteristics (for example: Accounting)
- Categories (for example: Manager)
- Territories (for example: Washington State)
- Organizational Unit (for example: Seattle Service Delivery)
- Location (for example: Location Agnostic)
- Resource Type (for example: User)

Now let's create a Bookable Resource in the Home Health application.

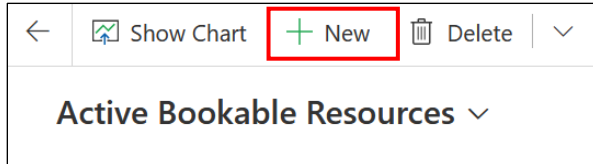
1. Navigate to [make.powerapps.com](https://make.powerapps.com).
2. Open the **Field Service** app.



3. In the bottom left of the navigation pane, change the area from **Service** to **Resources**.

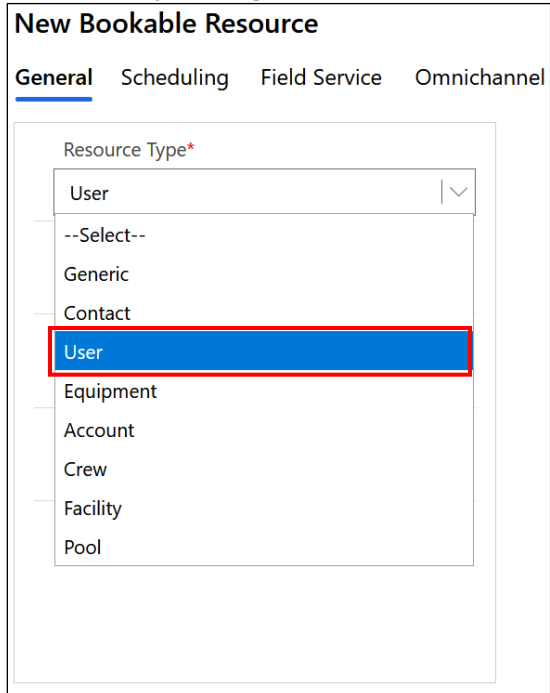


4. This will take you to the Bookable Resources entity. Click **New** on the command bar to create a new **Bookable Resource**.



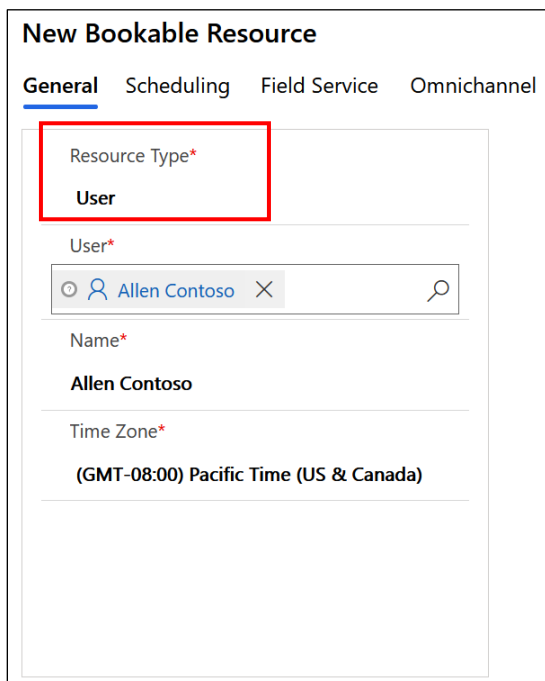
The screenshot shows the top of the Bookable Resources entity view. The command bar at the top contains a back arrow, a 'Show Chart' button with a bar chart icon, a '+ New' button (highlighted with a red box), a 'Delete' button with a trash icon, and a dropdown arrow. Below the command bar, the header reads 'Active Bookable Resources' followed by a dropdown arrow.

5. Select **Resource Type**. A Resource type is a classification that describes who or what the resource is and how the resource relates to your organization. In this case, select **User**, who is a person and a member of your organization and needs access to the Field Service Mobile app.



The screenshot shows the 'New Bookable Resource' form with the 'General' tab selected. The 'Resource Type\*' dropdown menu is open, showing a list of options: 'User', '--Select--', 'Generic', 'Contact', 'User' (highlighted with a blue bar and a red box), 'Equipment', 'Account', 'Crew', 'Facility', and 'Pool'. The 'User' option is the correct selection for a person.

6. Pick a **User** and select their **Time Zone**.



The screenshot shows the 'New Bookable Resource' form with the 'General' tab selected. The 'Resource Type\*' dropdown is now closed and shows 'User' (highlighted with a red box). Below it, the 'User\*' field shows a search bar with 'Allen Contoso' selected (highlighted with a red box). The 'Name\*' field shows 'Allen Contoso'. The 'Time Zone\*' field shows '(GMT-08:00) Pacific Time (US & Canada)'.

7. Click **Scheduling** to decide where the resource starts and ends his or her working day for scheduling and routing purposes. There are three options available when selecting the **Start/End location** for the Bookable Resource:
- **Location agnostic** - select this option if the location of this resource is not required for the business need and does not need to be considered during the scheduling process. Note that if the work location of a requirement is set to **on site**, location agnostic resources will not return in results.
  - **Resource Address** - select this option if the resource starts and ends his or her day at a unique location. The exact location is derived from the latitude and longitude values on the related user, account, or contact records depending on the resource type.
  - **Organizational Unit** - select this option if the resource starts and ends the day at an organizational unit, typically representing a company location.

In this case, choose **Location Agnostic**.

General		Scheduling	Field Service	Omnichannel
Start Location	*	Location Agnostic		
End Location	*	Location Agnostic		
		Generic Type (Deprecated)	---	
		Organizational Unit	---	
Scheduling				
Display On Schedule Board	*	Yes	Enable for Availability Search	Yes

8. Click the **Field Service** tab to optionally configure any other aspects of the Bookable Resource. **Save** the record.
9. After **saving** the bookable resource, it's time to set the **working hours** of the resource. Working hours are considered by the following:
- The schedule board by displaying working and nonworking hours as different colors.
  - The schedule assistant by only displaying resources that are working in the result.
  - Resource Scheduling Optimization, which automatically books requirements to resources that are working.

Click Show **Working Hours** on the command bar:

← Save Save & Close + New Show Work Hours

10. Click **+New** -> **Working Hours**.

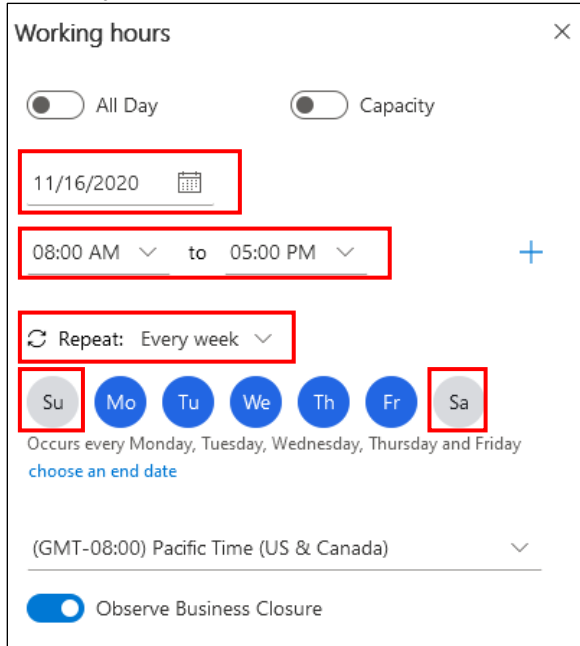
+ New Today ↑

Working hours

Non-working

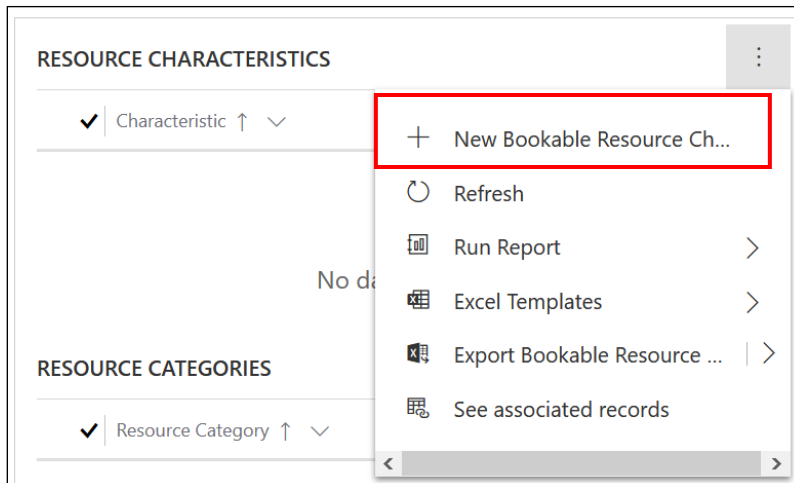
Time off

11. Choose **date** you want the working schedule to begin on, the beginning and end **time** of working hours (such as 8am to 5pm), along with a **repeat** option such as "every day" and then click off Sunday and Saturday. Click **Save**.



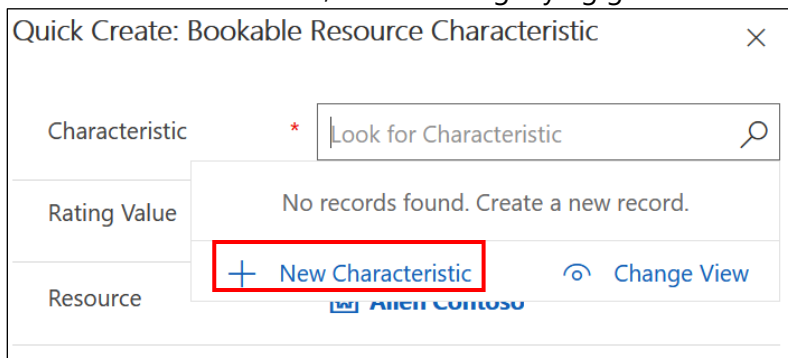
The "Working hours" dialog box shows configuration options. At the top are two toggle switches: "All Day" (off) and "Capacity" (off). Below these is a date field set to "11/16/2020" with a calendar icon. Underneath is a time range field set to "08:00 AM" to "05:00 PM". A "Repeat" dropdown is set to "Every week". Below the repeat option is a row of seven day buttons: "Su", "Mo", "Tu", "We", "Th", "Fr", and "Sa". The "Su" and "Sa" buttons are highlighted with red boxes. Below the day buttons, text indicates "Occurs every Monday, Tuesday, Wednesday, Thursday and Friday" with a link to "choose an end date". At the bottom, there is a time zone dropdown set to "(GMT-08:00) Pacific Time (US & Canada)" and a toggle switch for "Observe Business Closure" which is turned on.

12. Go back to General and create a **Resource Characteristic** by selecting **+New Bookable Resource Characteristic**.



The "RESOURCE CHARACTERISTICS" section shows a dropdown menu with "Characteristic" selected. A context menu is open, displaying several options. The option "+ New Bookable Resource Ch..." is highlighted with a red box. Other options in the menu include "Refresh", "Run Report", "Excel Templates", "Export Bookable Resource ...", and "See associated records". Below the menu, the "RESOURCE CATEGORIES" section is visible with a "Resource Category" dropdown.

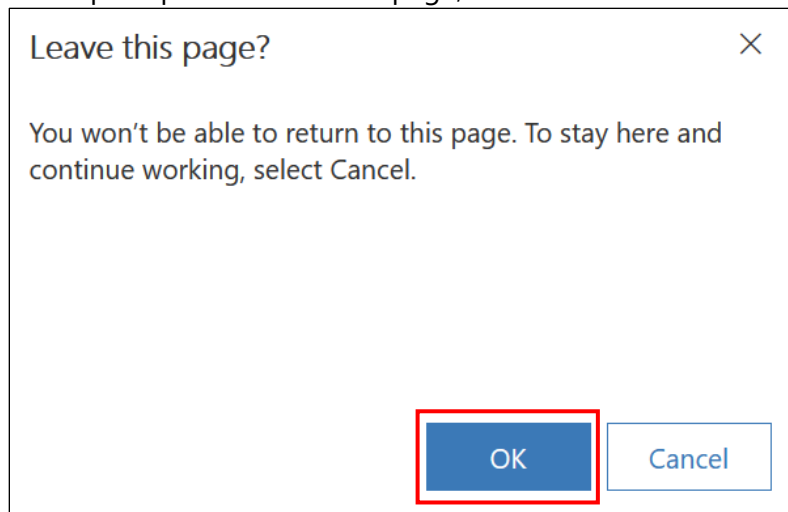
13. In the Characteristic field, click the magnifying glass and select **+New Characteristic**.



The "Quick Create: Bookable Resource Characteristic" dialog box features a search bar for the "Characteristic" field. The search bar contains the placeholder text "Look for Characteristic" and a magnifying glass icon. Below the search bar, a message states "No records found. Create a new record." A button labeled "+ New Characteristic" is highlighted with a red box. To the right of this button is a "Change View" link. The "Rating Value" and "Resource" fields are also visible but empty.



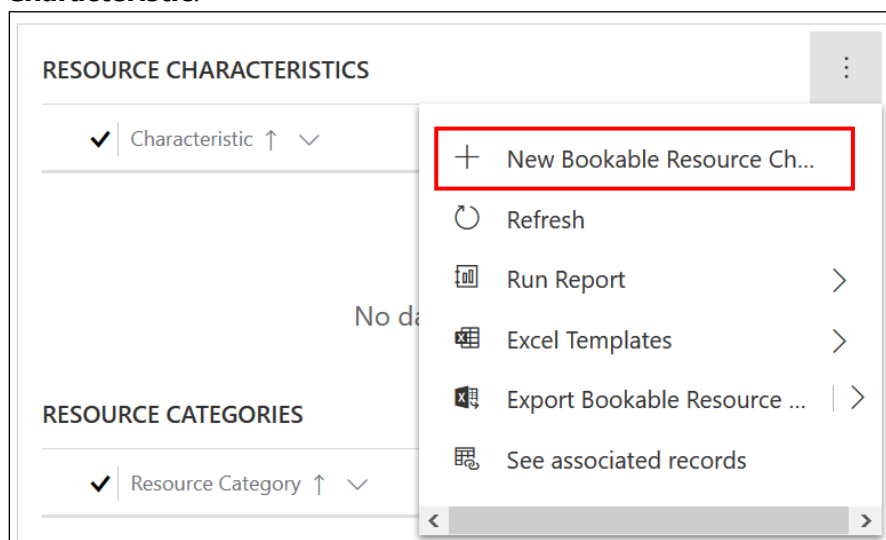
14. When prompted to leave this page, click **OK**.



15. Type "**Spanish fluency**" for the **Name** and click **Save & Close**.

A form titled "Spanish fluency" with the subtitle "Characteristic". It has two tabs: "General" (selected) and "Related". Under the "General" tab, there are three input fields: "Name" (containing "Spanish fluency" with a red asterisk), "Description" (containing "---"), and "Characteristic Type" (containing "Skill" with a red asterisk).

16. Back on the Bookable Resource record on the General tab, click **+New Bookable Resource Characteristic**.



17. In the Characteristic field, click the magnifying glass, search and select the **"Spanish fluency" Resource Characteristic** that you just created. Click **Save & Close**.

Quick Create: Bookable Resource Characteristic

Characteristic \*

Rating Value

Resource

Characteristics [Recent records](#)

Spanish fluency Skill

[+ New Characteristic](#) [Change View](#)

***Note:** Characteristics represent a resource's skills and certifications. This could be concrete, like a CPR certification; more general, like accounting or web development experience; or as simple as security clearance for a specific building or fluency in the Spanish language.*

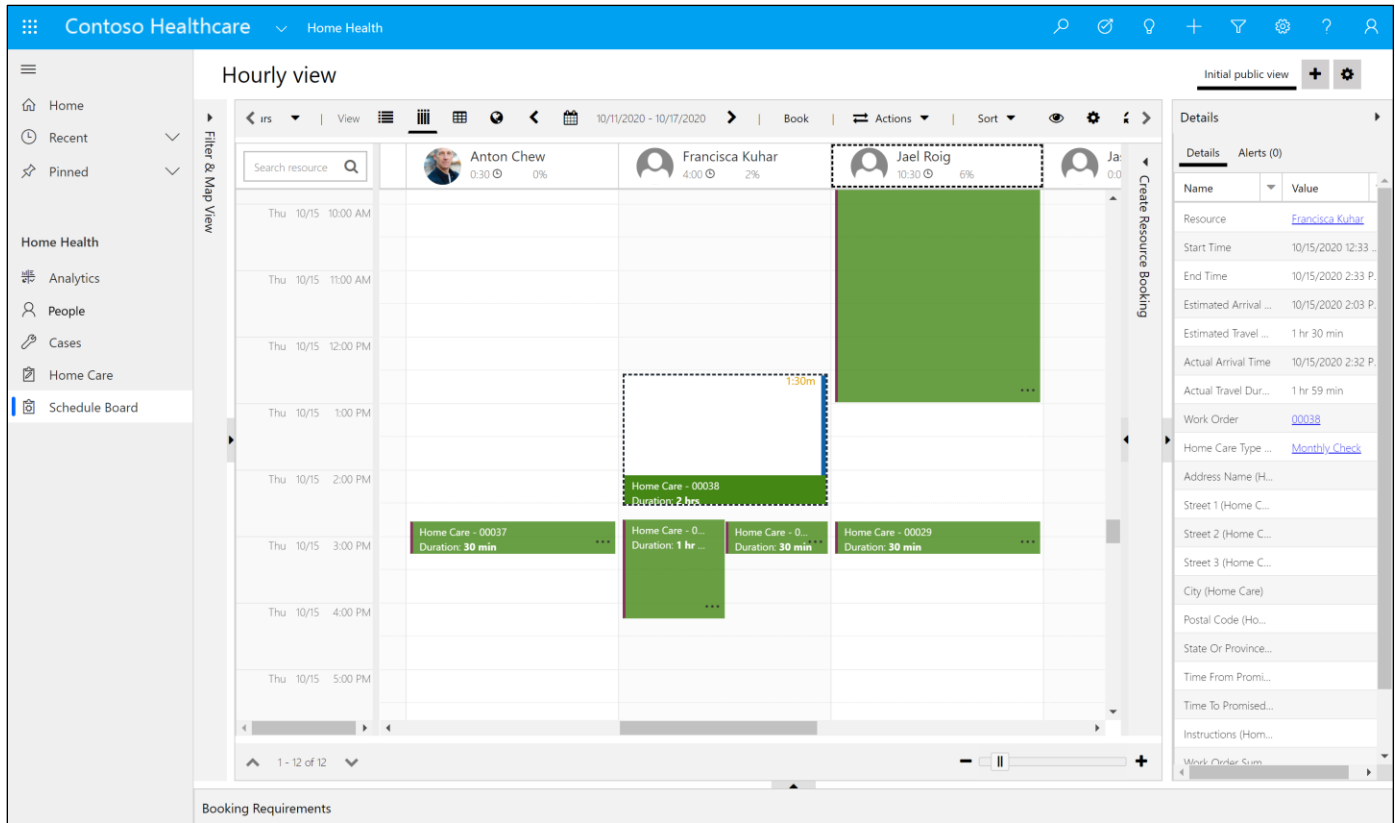
18. To have more data in the system, create **two** more **Bookable Resources** following the same process. For each of them, select **Contact** as the **Resource Type** and choose any Contact in the system. Choose **Location Agnostic** just as before and click **Save**. Configure the **Work Hours** the same as the previous Bookable Resource and click **Save & Close**.

**Congratulations!** You have created a Bookable Resource. In the next task, we will use this bookable resource to help configure the Schedule Board.

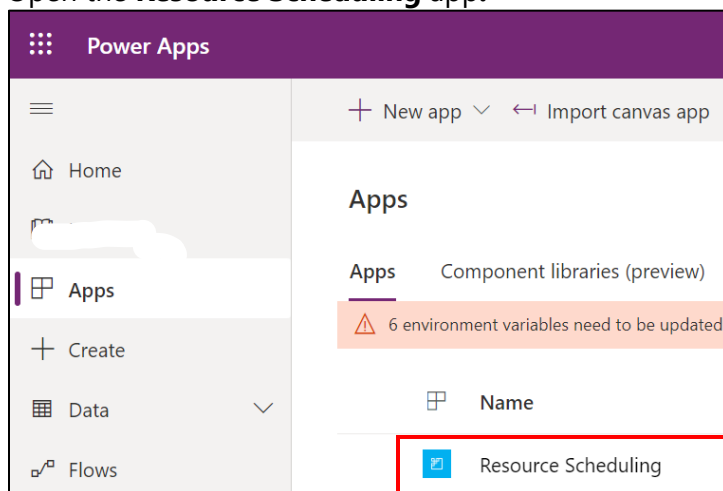
## Exercise 2: Configure the Schedule Board

In this exercise, you will configure the schedule board for the **Bookable Resource** that you created in the previous task. The schedule board provides an overview of resource availability and bookings you can make. Before you use the schedule board, it is important to set up the views and filters to your preference. To use the schedule board booking functionality, geocoding, and location services, you need to turn on maps.

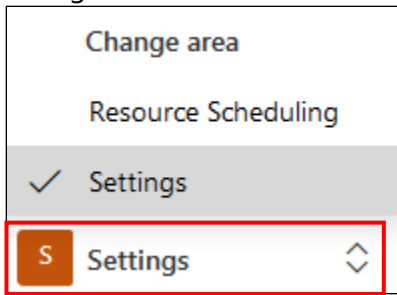
Here is an example of a configured **Schedule Board**:



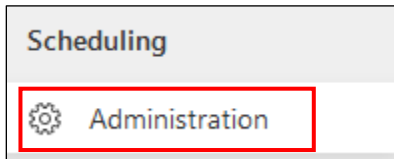
1. Navigate to [make.powerapps.com](https://make.powerapps.com).
2. Open the **Resource Scheduling** app.



3. Change the area in the bottom left navigation drop down from Resource Scheduling to **Settings**.



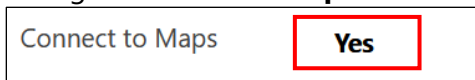
4. Click **Administration**.



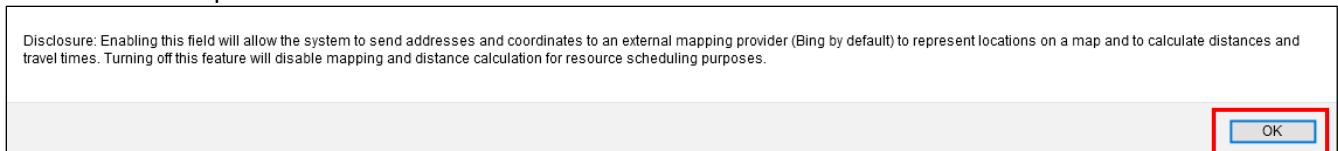
5. Click **Scheduling Parameters**.



6. Change "Connect to Maps" to **Yes**.

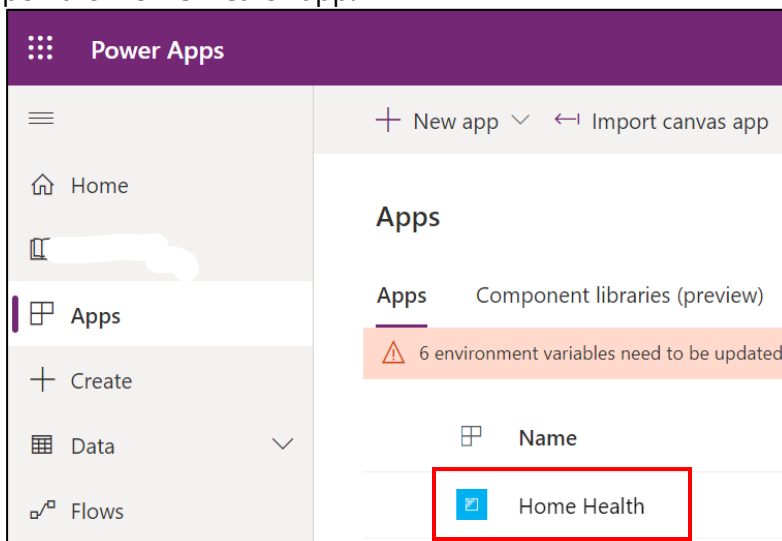


7. Click **OK** to accept the terms.



8. Click **Save & Close**.

9. Open the **Home Health** app.



10. Click **Home Care** and open any **Home Care Work Order**.

The screenshot shows the 'Active Home Cares' section of a software interface. On the left is a sidebar with navigation options: Home, Recent, Pinned, Home Health, Contacts, Cases, Home Care (highlighted with a red box), and Schedule Board. The main area displays a table of active home care work orders.

Work Order Number	Household	Substatus
00029	Wagner Household	---
00020	Contoso, Ltd.	---
00028	Butler Household	---
00026	Irwin Household	---
00032	Wilson Household	---

11. Click **Related** and then click **Characteristics**.

The screenshot shows the details page for Home Care work order 00029. The 'Related' dropdown menu is open, showing various options. The 'Characteristics' option is highlighted with a red box. The main page displays general information about the work order, including patient details, household, physician, and visit summary.

**GENERAL**

Time Window Start	11/16/2020	12:00 AM
Time Window End	11/16/2020	2:00 AM
Patient	Elizabeth Moore	
Household	Wagner Household	
Physician	Logan Edwards	
Home Visit Number	00029	
System Status	Open - Unscheduled	
Substatus	---	
Home Visit Type	Home Visit	
Home Visit Summary	Replacing a cracked denture	
Price List	Home Visit Price List	

**Related - Details**

- Resource Bookings
- Incidents
- Products
- Services
- Service Tasks

**Related - Common**

- Activities
- Connections
- Audit History
- Actuals
- Characteristics**
- Resource Preferences
- Requirements
- Time Entries
- IoT Alerts

**Related - Inventory**

- Purchase Orders
- RMAs

12. Click **+ New Requirement Characteristic**.

The screenshot shows the details page for Home Care work order 00029. The 'Summary' tab is selected. At the bottom, there is a button labeled '+ New Requirement Characteristic' which is highlighted with a red box.

**00029**  
Home Care


Summary Patient Information Settings


Show Chart + New Requirement Characteristic

13. Choose **"Spanish fluency"** for the **Characteristic** and a desired Work Order for the **Resource Requirement**. Click **Save & Close**.


**New Requirement Characteristic**

**General** Field Service

Owner \* ✓  Jam

Characteristic \*  **Spanish fluency**


Rating Value ---


Resource Requirement \*  


**Important:** Make sure the **Work Order** number populated in the **Resource Requirement** field matches the Work Order number on the **Field Service** tab.


14. Click **Schedule Board**.

Home Health

 Contacts


 Cases

 Home Care

 **Schedule Board**

15. Click the **+** button in the upper right corner to create a new **Schedule Board tab**.

Hourly view

Initial public view **+** 

Filter & Map View


Filter Map View


11/16/2020


Grayscale Gray

Seattle

Search resources...

Allen Contoso 0.00 0% 

Cameron Baker 0.00 0% 

Elizabeth Moore 0.00 0% 

12:00 AM 1:00 AM 2:00 AM 3:00 AM 4:00 AM 5:00 AM 6:00 AM 7:00 AM 8:00 AM

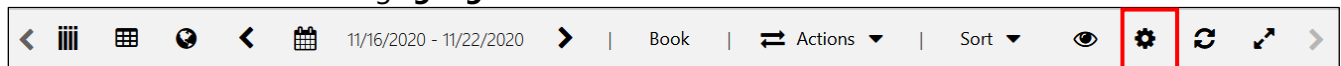
Create Resource Booking

Details

1 - 3 of 3


16. Name the new Schedule Board tab **"My Schedule Board Tab"**. Leave all defaults and click **Add**.

17. Click on the Scheduler Settings **gauge**.

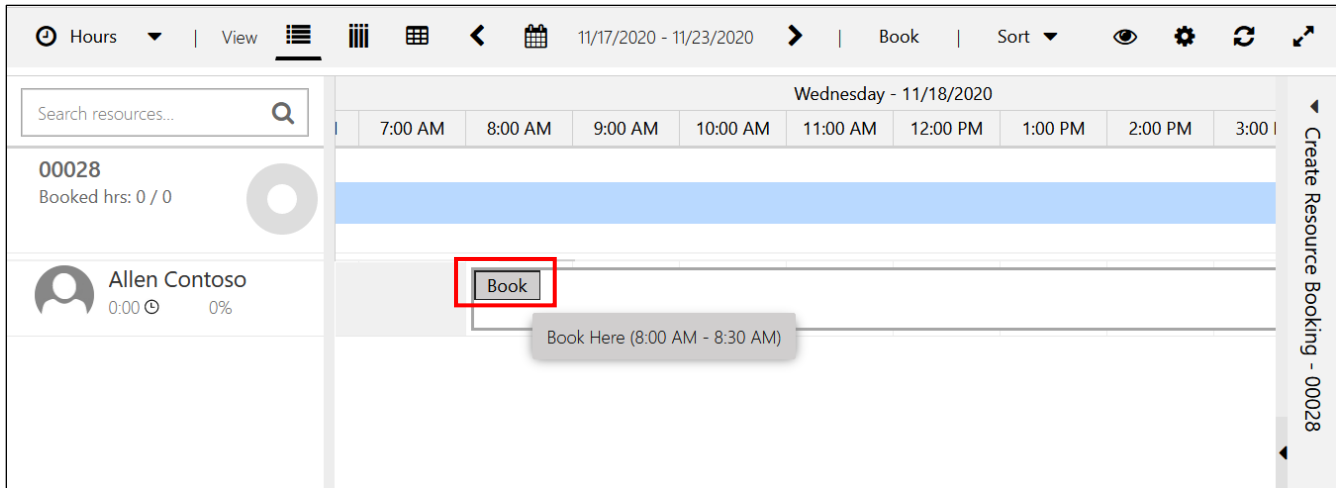


18. Change the Hours view to be closer to typical working hours, such as 6am to 6pm.

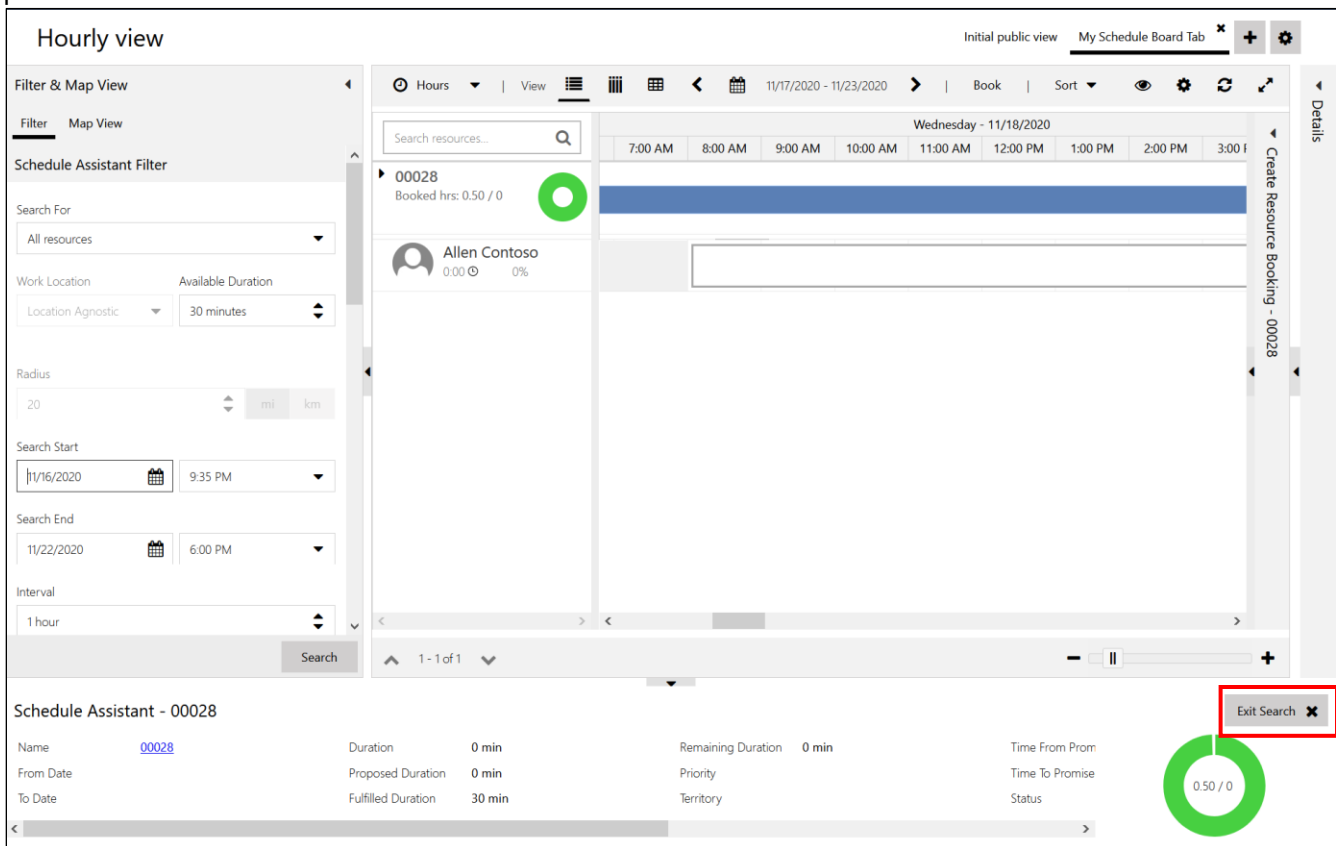
19. Find the work order that you added the **Spanish fluency** characteristic to and click on the grid to highlight it. Click **Find Availability** to open the Schedule Assistant filter.

Open Requirements    Unscheduled Service Activities <u>Unscheduled Work Orders</u>																
Work C	Household (Home C	Is Prim	From C	To Date	Duratic	Owner	Status	Priority	Time From	Time To	Fulfillm	Time Window	Time Winc	Work L	Created	
00028	Butler Household	Yes			0 min	SYSTEM	Active					11/07/2020 8:...	11/07/202...	Onsite	10/30/...	
00020	Contoso, Ltd.	Yes			0 min	SYSTEM	<div><div></div>FIND AVAILABILITY</div>					11/01/2020 1:00 ...	11/01/2020 ...	Onsite	10/30/2...	

20. Notice that the other two Bookable Resources that you created that do NOT have the "Spanish fluency" characteristic are dropped from the search. Click the **Book** button on the Bookable Resource's schedule to schedule the work order.



21. The work order is now scheduled and has disappeared from the bottom grid. Click **Exit Search** to close the pane.



**Congratulations!** You gave configured a Schedule Board tab and scheduled a Home Health visit using the bookable resource that you created in the previous task in this exercise.



## Exercise 3: [BONUS] Leverage Care Management Components with Field Service Mobile App

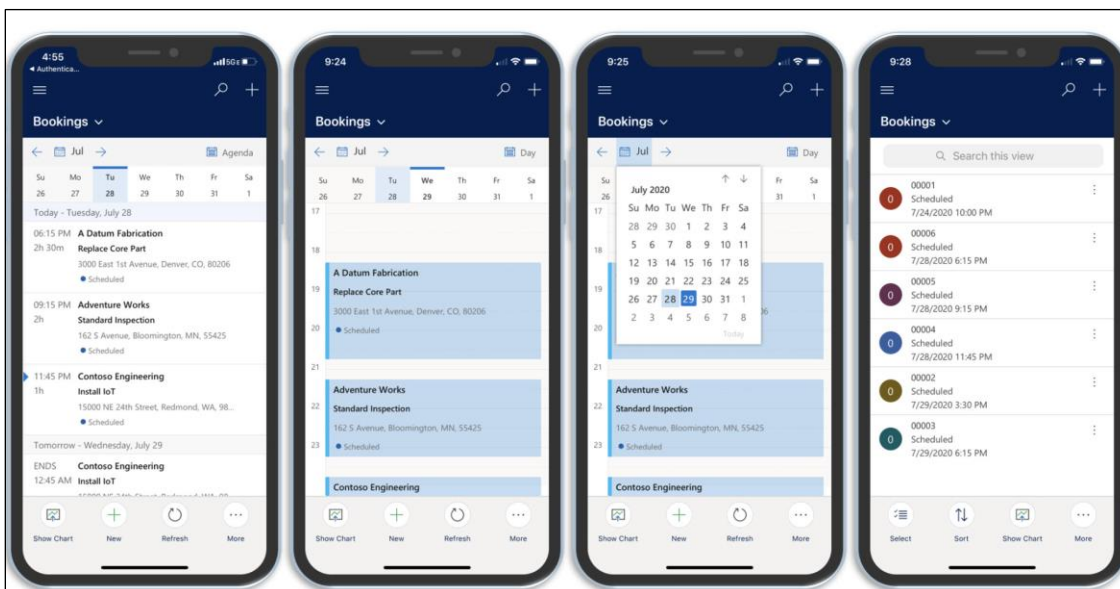
In this exercise, we are going to walk you through the **Field Service Mobile App** and demonstrate how to leverage **Care Management** components from the perspective of a Nurse or a Physical Therapist out in the field working with a patient. We will walk through the installation process, how to set up **Home Health** users and security profiles, and how to use the app to complete work orders.

[The Field Service \(Dynamics 365\) mobile app](#) is designed and optimized for mobile health workers to view Dynamics 365 Home Health work orders and patient information. This mobile app is **built on Microsoft Power Platform** and is customizable to your business needs with the same admin console as all Dynamics 365 business apps.

It is available natively for Apple iOS and Google Android phones and tablets, the Field Service (Dynamics 365) mobile app offers technicians many capabilities they need to perform onsite customer service, such as the following:

- A calendar view of assigned jobs
- Support for picture, video, and asset barcode scanning
- Customer signature capture
- Offline capabilities so mobile health workers can continue viewing and recording work in areas without internet

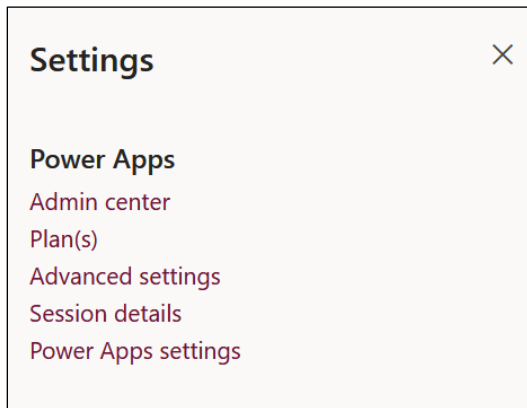
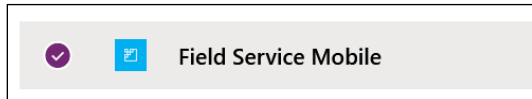
Here is a calendar view of scheduled work orders:



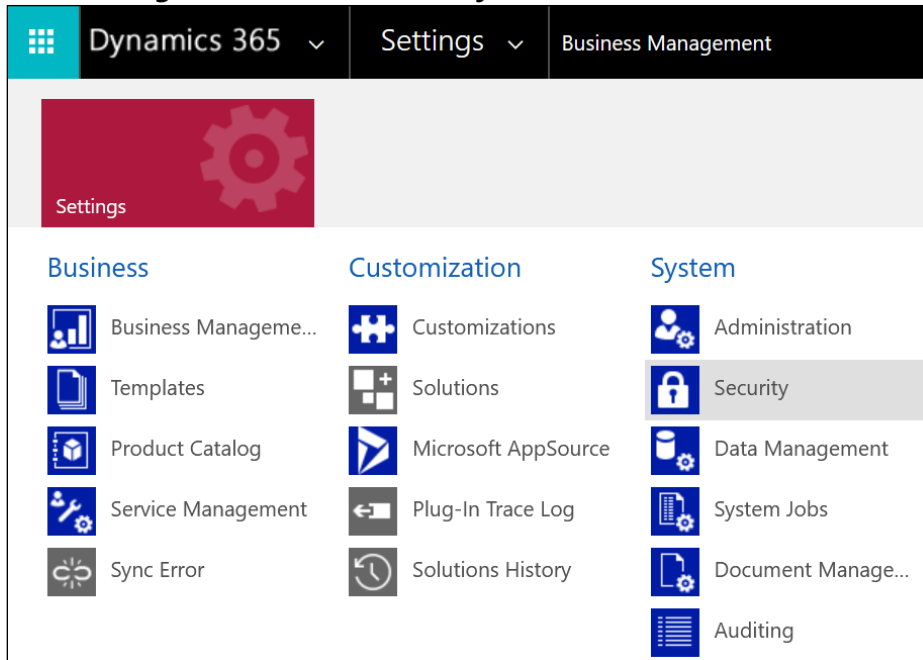
## Task 1: Assign Security Roles to Field Service Mobile Users

In this task we will assign the Field Service – Resource role to Home Health workers.

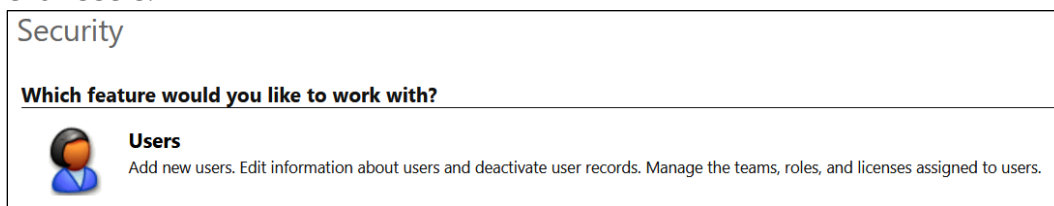
1. Navigate to [make.powerapps.com](https://make.powerapps.com).
2. Go to **Apps** to select the **Field Service Mobile** app and then click the **gear** icon in the upper righthand corner and go to **Advanced Settings**.



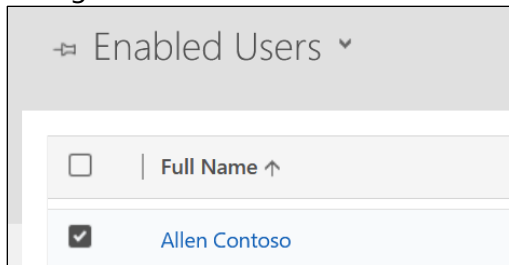
3. Click **Settings** and then click **Security**.



4. Click **Users**.



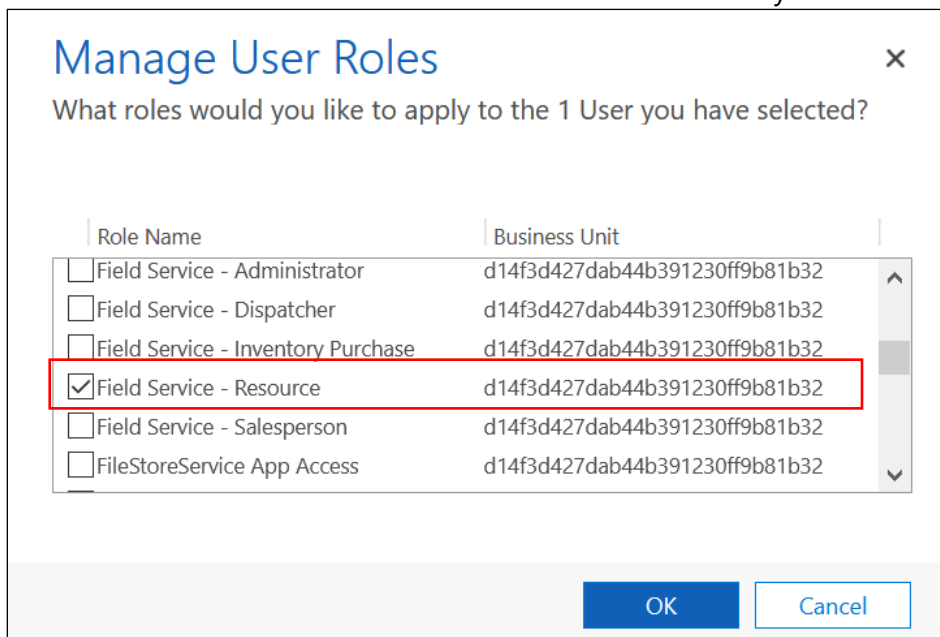
5. Change the view to show “**Enabled Users**”.



6. Find and select the user whom you would like to assign the “Field Service – Resource” role and select **Manage Roles**.



7. Scroll down to select the “**Field Service – Resource**” security role and click OK.



**Congratulations!** You have assigned the Field Service – Resource role to a Field Service Mobile Home Health user in the Microsoft Cloud for Healthcare.

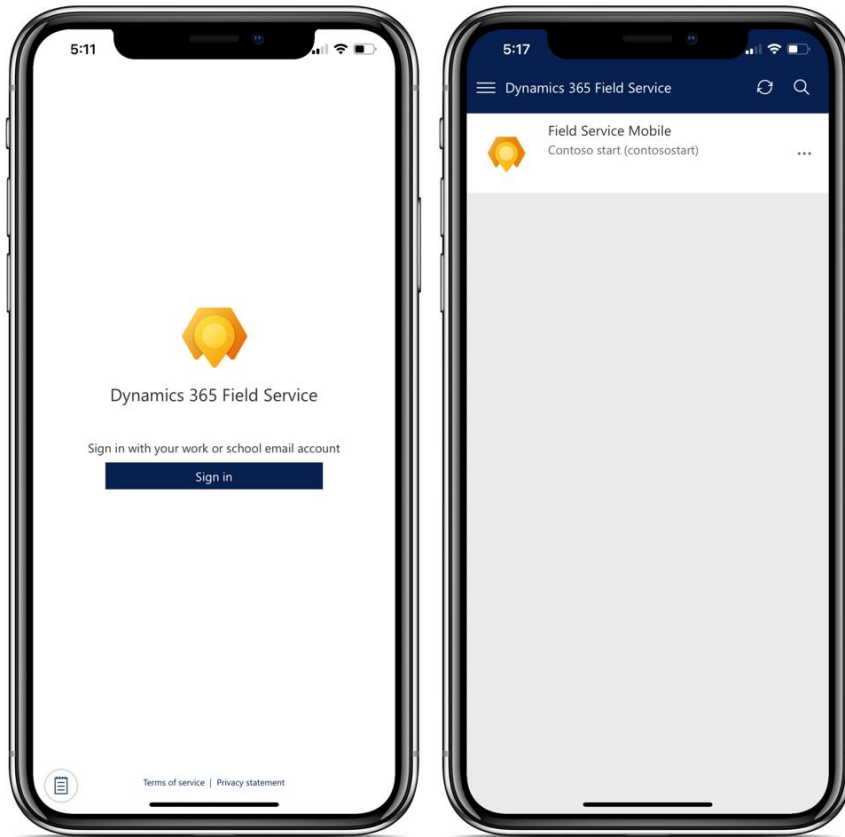
## Task 2: Download the Field Service Mobile app and sign in

In this task, we will walk through how to download the Field Service Mobile app to an iOS or Android device and sign in.

1. Go to the app store on your iOS or Android device and search for Dynamics 365 Field Service.
2. Download the app called **Field Service (Dynamics 365)**, as seen in the following screenshot. It is the mobile application built on the Power Platform.



3. Launch the app and sign in with the Microsoft Cloud for Healthcare username and password for the user that you assigned the "Field Service – Resource" security role to in the previous task.

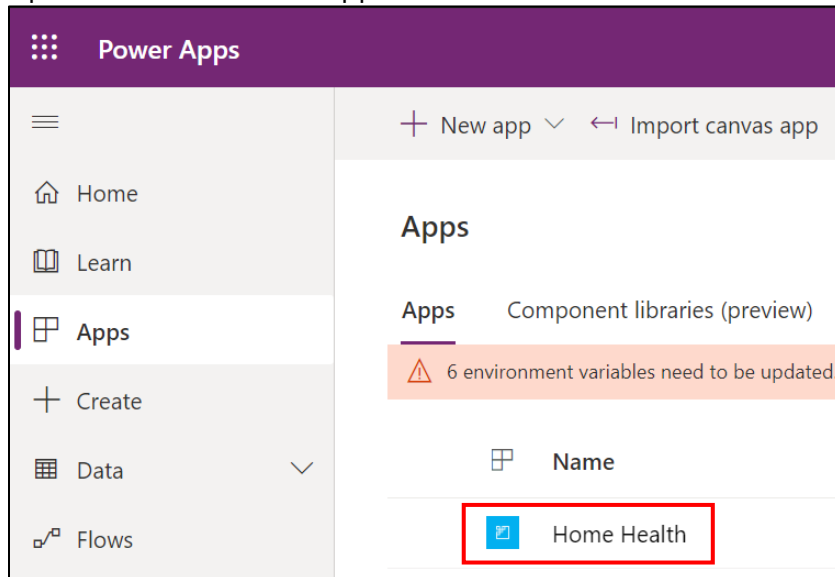


**Congratulations!** You have downloaded and signed into the Field Service Mobile as a Home Health user in the Microsoft Cloud for Healthcare

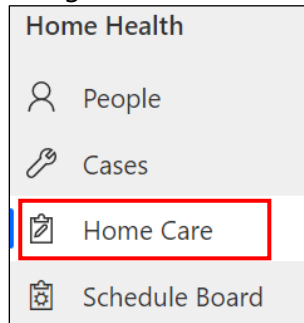
### Task 3: Use the Field Service Mobile app to manage Home Health Work Orders

In this task we will assign a **Home Health Work Order** to our Home Health Bookable Resource. We will then view and make updates to it in the Field Service mobile app, and view those changes in the Microsoft Cloud for Healthcare Home Health app.

1. Navigate to [make.powerapps.com](https://make.powerapps.com).
2. Open the **Home Health** application.



3. Navigate to **Home Care**.




4. **Open** the unscheduled **Home Care Work Order 00020** for the Contoso, Ltd. Household.  
(Opening any unscheduled Home Care Work Order is fine)

Active Home Cares ▾			
✓   Work Order Number ▾	Household ▾	Substatus ▾	System Status ▾
00020	Contoso, Ltd.	---	Open - Unsched...

5. Scroll down to the Primary Incident section and set the **Primary Incident Estimated Duration** to 1 hour (this will ensure that the work order takes up time on the Resource's calendar once scheduled).

PRIMARY INCIDENT

Primary Incident Type \*  Defective Monitoring Hardware

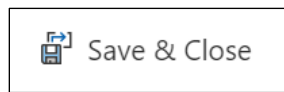
Primary Incident Description Defects covered in patient vitals monitoring hardware

Primary Incident Estimated Duration 1 hour

Primary Incident Customer Asset ---

IoT Alert ---

6. Click **Save & Close**.



7. Navigate to the **Schedule Board** and click **Unscheduled Work Orders**.

Dynamics 365 Home Health SANDBOX

Hourly view

Initial public view

Search resources...

Allen Contoso 0:00 0%

PM 3:00 PM 4:00 PM 5:00 PM 6:00 PM 7:00 PM 8:00 PM 9:00 PM 10:00 PM 11:00 PM 12:00 AM 1:00 AM 2:00 AM 3:00 AM

Open Requirements Unscheduled Service Activities **Unscheduled Work Orders**

Work Order	Household (Home Care)	Is Primary	From Date	To Date	Duration	Owner	Status	Priority	Time From	Time To	Fulfillment	Time Window	Time Window	Work Location	Created
00020	Contoso Ltd.	Yes			1 hr	K Venkat	Active					11/01/2020 1:30 ...	11/01/2020 ...	Onsite	02/10/2...
00027	Jensen Household	Yes			1 hr	K Venkat	Active					11/11/2020 7:30 ...	11/11/2020 8...	Onsite	02/10/2...
00026	Irwin Household	Yes			0 min	K Venkat	Active					11/05/2020 7:00...	11/05/2020 ...	Onsite	02/10/2...
00034	Thompson Household	Yes			0 min	K Venkat	Active					11/18/2020 10:0	11/18/2020 1	Onsite	02/10/2...

8. **Drag** the Home Health Work Order **onto the Schedule Board** to assign it to your Bookable Resource.

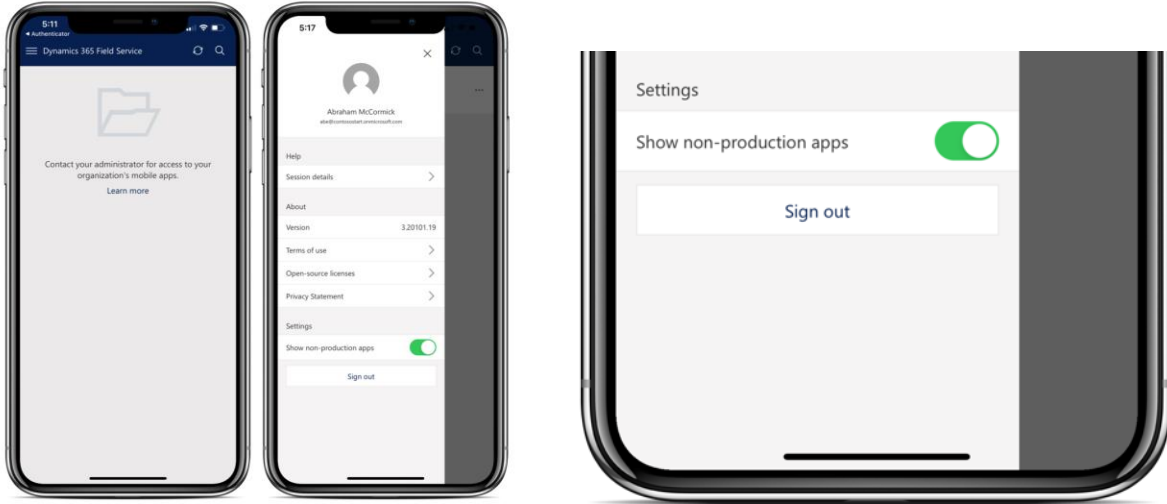
Search resources...

Allen Contoso 1:00 1%

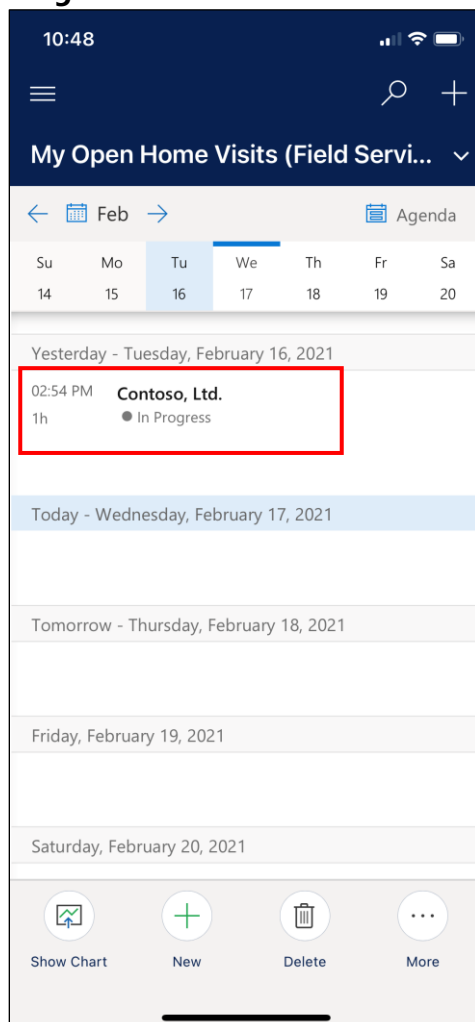
Tuesday - 2/16/2021

11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	5:00 PM	6:00 PM	7:00 PM
				Home ... Durati...				

9. On your mobile device, log into the Field Service Mobile App as your Bookable Resource user. If you encounter a message that says, "Contact your administrator for access to your organization's mobile apps", simply select the menu icon in the top left and **toggle Show non-production apps to Yes** (as the list shows production apps by default).



10. In the list of environments, **find the Microsoft Cloud for Healthcare environment** that you have been working in. From there, you will find the Home Health Work Order in the calendar view in an **"In Progress"** state.





11. **Click to open** the Work Order. Notice the Booking Status says **In Progress**.

A screenshot of a mobile application interface for a 'Bookable Resource Booking'. The top status bar shows the time as 10:50 and signal/battery icons. The app header includes a back arrow, a search icon, and a plus icon. Below the header, the booking ID '00020' is displayed, followed by the title 'Bookable Resource Booking'. A tab bar at the top of the main content area has four tabs: 'General' (selected), 'Customer', 'Service', and 'Notes'. The 'General' tab is active, showing a form with the following fields: 'Booking Status\*' with a dropdown menu set to 'In Progress' (highlighted with a red box), 'Start Time\*' with a date field set to '2/16/2021' and a time field set to '2:54 PM', 'Actual Arrival Time\*' with a date field set to '2/16/2021' and a time field set to '3:53 PM', 'End Time\*' with a date field set to '2/16/2021' and a time field set to '3:54 PM', and 'Duration\*' with a text field set to '1 hour'. At the bottom of the screen is a navigation bar with four icons and labels: 'Save', 'Save & Close', 'New', and 'More'.

12. Update the Booking Status from "In Progress" to "Completed" to close the Work Order and click **Save**.

A screenshot of the same mobile application interface, but with the booking status updated to 'Completed'. The 'Booking Status\*' dropdown menu is now set to 'Completed' (highlighted with a red box). The 'Save' button in the top right corner of the form area is also highlighted with a red box. The other fields in the form remain the same: 'Start Time\*' is '2/16/2021' at '2:54 PM', 'Actual Arrival Time\*' is '2/16/2021' at '3:53 PM', 'End Time\*' is '2/16/2021' at '3:54 PM', and 'Duration\*' is '1 hour'. The bottom navigation bar remains the same with 'Save', 'Save & Close', 'New', and 'More' buttons.

10:51

< 00020

Bookable Resource Booking

General Customer Service Notes

Booking Status\*  
Completed

Start Time\*  
2/16/2021 2:54 PM

Actual Arrival Time\*  
2/16/2021 3:53 PM

End Time\*  
2/17/2021 10:50 AM

Duration\*  
19.92 hours

Save Save & Close New More

13. Navigate back to the Home Health app and click **Home Care** on the site map.

Home Health

People

Cases

Home Care

Schedule Board

14. Find your Work Order. You will see that the System Status has been updated to **Open – Completed**.

Active Home Cares			
✓ Work Order Number	Household	Substatus	System Status
00020	Contoso, Ltd.	---	Open - Complet...

**Congratulations!** You have assigned a Home Health Work Order to a Home Health Bookable Resource, made updates to the work order in the Field Service mobile app, and then viewed those changes in the Microsoft Cloud for Healthcare Home Health app.