



Microsoft Cloud for Healthcare **in a Day**

Lab 01: Care Management

Step-by-Step Lab

April 2021

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Overview

Prerequisites

Note: If you are in an official training, the environment has been set up and provided to you.

This is the **first** lab in a series covering the Microsoft Cloud for Healthcare. These labs follow a sequence of presentations covering an overview of Microsoft Cloud for Healthcare, Solution Center installation, and the Healthcare Data model. Before beginning this lab, confirm that you have provisioned an environment with the necessary components installed as described in following two links:

- [Deploy Microsoft Cloud for Healthcare solutions powered by Dynamics 365](#)
- [Microsoft Cloud for Healthcare Licensing](#)

Before You Begin

Note: If you're in an official training the user credentials and environment name 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.



Microsoft Cloud Solution Center

This lab focuses on the **Care Management** healthcare solution from Microsoft Cloud Solution Center.

Healthcare solutions for provider					
<p>Patient Service Center Has all required licenses Support patients with patient insights. Share information and set up appointments with patients through chat.</p> <p>Quick view <input type="checkbox"/> Add</p>					
<p>Patient Outreach Has all required licenses Reach out to patients for personalized care. Keep your healthcare consumers and patients up to date with emails and events.</p> <p>Quick view <input type="checkbox"/> Add</p>					
<p>Patient Access Has all required licenses Facilitate patient access to secure portals and mobile tools for better patient satisfaction and care transparency.</p> <p>Quick view <input type="checkbox"/> Add</p>					
<p>Care Management Has all required licenses Organize patient care activities to achieve safer and more effective care.</p> <p>Quick view <input checked="" type="checkbox"/> Added</p>					
<p>Home Health Has all required licenses Coordinate your home visit team to schedule appointments, manage schedules and conduct home visits.</p> <p>Quick view <input type="checkbox"/> Add</p>					
<p>Virtual Visits Has all required licenses Empower your care team and patients to schedule and launch virtual appointments. Note: Setup is completed in the Microsoft Admin Center and requires global admin access.</p> <p>Quick view Go to setup</p>					

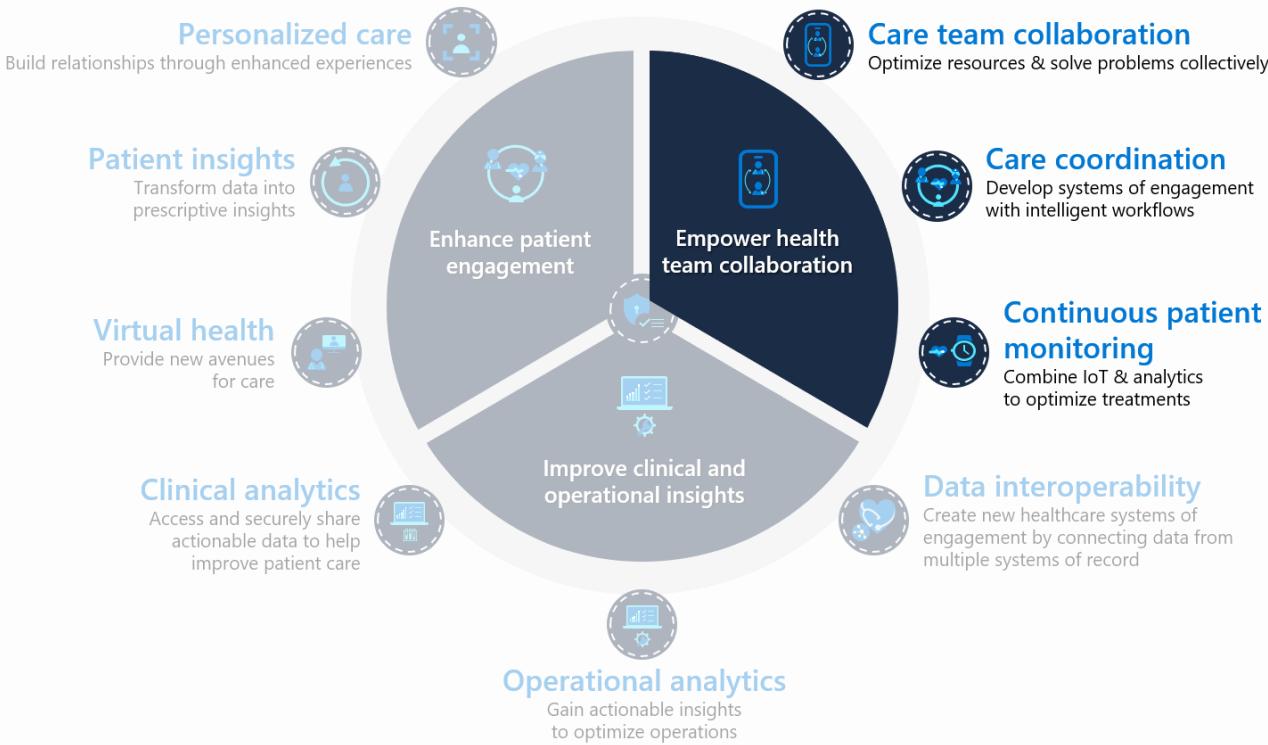
The Care Management solution helps providers coordinate care plans and care teams. They can create, personalize, and enable new care plans and manage care team members in the Care Management or Care Team Member applications, allowing for capabilities in three categories:

1. Administration for managing organizational data.
2. Care Management to support delivering care to patients.
3. Clinical Data to manage medical information, such as allergies and medical records.

This lab will explore the Healthcare Data Model and highlight where a care coordinator may navigate Patient 360 information on a form while providing care. It will also show you how to customize the form and sitemap to provide more data and insight.

Industry Prioritized Scenarios

Care Management focuses on the **Empower health team collaboration** priority scenario by creating a system that allows for enhanced care team collaboration and coordination.



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 lab:

- [Care Management: Coordinate care plans and care teams](#)

Goals

After this lesson you will be able to do the following:



- Understand key tables of Healthcare data model for Care Management.
- Navigate Care Management application
- Extend Care Management model-driven application



The estimated time to complete this lab is **50** minutes.

Exercise 1: Explore Patient 360 Information in Care Management App

Communicate the right information, at the right time, to the right people, to provide safe and effective care to the patient. Easily create, personalize, and enable new care plans for patients, and manage care team members.

Key capabilities for Care Management include:

- **Care team:** View the care team collaborating to provide the best care for the patient and reach out to them directly through Microsoft Teams.
- **Care plan:** Create and assign care plans and automate adherence to improve care for your patients.
- **Care Plan Timeline:** Ability to view clinical events in a sequential fashion for the purposes of understanding what events have taken place to discern what should be the next plan of action and/or avoid duplication.

In the **Health Analytics** dashboard, the Care Coordinator Dashboard is a template for viewing care plan specifics, appointments, and a personalized timeline.

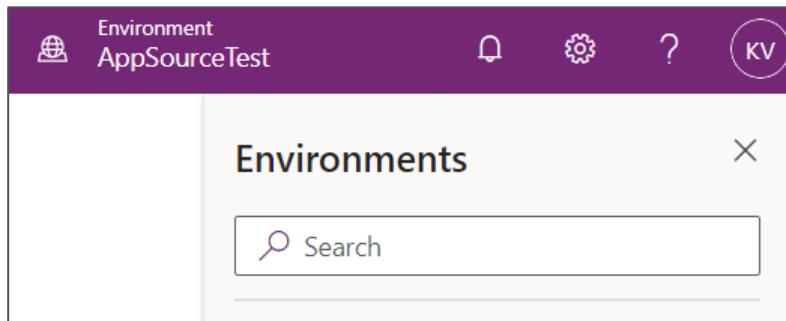
In this Exercise, you will use Care Management App and login as a Care Coordinator to navigate and do the following.

1. View **Patient 360 Dashboard** to view the recent **Appointment EMR** created for patients and assigned to Practitioner.
2. View **Organizations (Provider)** details and onboard new branch location to link it with Organization.
3. How to Create Patient data along with **encounter** details to provide a better health service to patient and access other patient clinician data like **observations, conditions**, and allergy intolerance etc.
4. How to Create Practitioner data and view existing practitioner data with **appointments** assigned and **procedures** performed by practitioner.
5. Add Care Plan, Care Team, and associate members i.e., Patient, one or more Practitioner, patient Related person, Nurses etc.

Task 1: View Patient 360 Dashboard for Appointments and Care Plan activities

In this task, you will play the role of a Care Coordinator who would like to view all Open Appointment EMRs and Care Plan Activities within the Care Management App

1. Sign-in to **Power Apps** and navigate to your environment.
 - a. Open browser with **InPrivate** window for **Edge** browser or Incognito for Chrome browser.
 - b. Login to [Power Apps](#).
 - c. Choose your environment where **Care Management** app is installed.



2. Open the **Care Management** App

- Navigate to the **Apps** section on the sitemap.
- Click to open **Care Management** from the Apps list (Refer the below picture)

The screenshot shows the Microsoft Power Apps portal. On the left, there is a navigation sidebar with options like Home, Learn, Apps (which is highlighted with an orange box), Create, Data, Tables, Choices, Dataflows, Export to data lake, and Connections. The main area is titled 'Apps' and shows a list of apps. The 'Care Management' app is selected and highlighted with an orange box. The table data is as follows:

Name	Modified
Care Management	2 wk ago
Field Service	3 wk ago
Field Service Mobile	3 wk ago
Resource Scheduling	3 wk ago
Customer Service Hub	3 wk ago
Customer Service workspace	3 wk ago

- Once you have opened Care Management, navigate to **Health Analytics** on the left navigation panel.
- By default, it opens the "**Care Coordinator Dashboard**" with below sample data (refer below picture)
 - "Active Care Plan Activities"** – Shows the glimpse of all the recent Care plan activities with **Activity Title** with **Patient Full name** and **Schedule date**.
 - "All Open Appointment EMR and Timeline"** – Shows the glimpse of All the recent open **Appointments with Patient and practitioner** information.

- e. The Care coordinator can also see the other aspects of Activities and Appointment EMR data by changing the views on the dashboard. i.e., “**Patient Details All Appointments EMR**”, “**Closed Appointment EMR**”, etc.

The screenshot shows the Care Coordinator Dashboard with three main sections:

- Active Care Plan Activities:** A list of care plan activities for Amber Rodriguez, dated from November 9, 2020, to December 25, 2020.
- All Open Appointments (EMR):** A list of open appointments for various patients, including Amber Rodriguez, Jessie Irwin, Kayla Lewis, Elizabeth Moore, Taylor Phillips, and Casey Jensen.
- Timeline:** A list of recent events, such as tasks modified by IAD User 11 and emails from IAD User 11.

Task 2: Create a new Provider Location and Physician

In this task, you will continue to get to know the Healthcare Data Model by creating a new branch **Location** for **Lamna Healthcare Company**. Then, you will create new **Practitioner** and **Patient** records.

Although it's not common for the Care Coordinator to manually enter healthcare data since it usually exists in healthcare data sources and can be synced directly into Dataverse to be used in the Microsoft Cloud for Healthcare. For today's purposes, you will be entering data to help learn the data model schema behind core tables within the Microsoft Cloud for Healthcare, along with their main attributes, and relationships.

With Azure API for FHIR, you can securely transfer that data into Dataverse once it's located on the FHIR Server. You will learn more about this topic in Lab 06: Azure FHIR Sync Agent. For now, we will focus on the healthcare common data model.

1. Create a new **Location** record for Lamna Healthcare Company in the **Care Management** App
 1. View **Care Provider (Organizations)** data: Now that you have opened **Care Management** App, Let's go and view the **Lamna Healthcare Company** record.
 2. Navigate to the Sitemap on the left navigation panel and click **Organizations**.
 3. Ensure **Active Accounts** view selected and then click to open **Lamna Healthcare Company**.

The screenshot shows the Dynamics 365 Care Management interface. The top navigation bar includes 'Dynamics 365' and 'Care Management'. The main area displays a list of 'Active Accounts' with columns for Account Name, Main Phone, and Address 1: City. One account, 'Lamna Healthcare Company', is highlighted with an orange box. The left sidebar shows the Sitemap with 'Organizations' also highlighted with an orange box.

Account Name	Main Phone	Address 1: City
Contoso Blood Test Labs	445-223424324	---
Fabrikam Inc	423-555-0100	Loyal
Lamna Healthcare Company	423-555-0100	Elko New Market
Proseware, Inc.	423-555-0100	Kenton
Trey Research	423-555-0100	Chattanooga

4. Take a moment to review the **Summary** and **Details** tab view details of **Lamna Healthcare Company**.

The screenshot shows the account details page for 'Lamna Healthcare Company'. The top navigation bar includes 'Summary' (which is active and highlighted with an orange box), 'Details', 'Insights', 'Scheduling', 'Field Service', 'Files', 'Assets and Locations', and 'Related'. The main content area is divided into sections: 'ACCOUNT INFORMATION' (with fields for Account Name, Phone, Fax, Website, Parent Account, and Ticker Symbol), 'ADDRESS' (with fields for Address 1: Street 1 and Address 2), 'Timeline' (showing a note about an appointment and an auto-post from the account), and 'Assistant' (showing no notifications or suggestions). A large orange box highlights the entire page content.

5. Create a new **Location** record and link it to **Lamna Healthcare Company** by performing the following steps:

- Navigate to the Sitemap on the left navigation panel and click **Locations**.
- Click to **New** button to create new Location for Lamna Healthcare Company
- Enter the following details for the new **Location**:
 - Name:** Contoso Blood Test Lab
 - Address 1:** 138 Littleton St

- iii. **Address City:** Huntington
- iv. **Address State:** NY
- v. **Address Country:** USA
- vi. **Address Period Start & End:** Any Date
- vii. **Managing Organization:** Lamna Healthcare Company

d. Click **Save & Close**.

New Location

General

Name	Contoso Blood Test Lab
Address City	138 Littleton St.
Address Country	USA
Address Distinct	Huntington
Address Period End	1/25/2021 8:00 AM
Address Period Start	12/25/2025 8:00 AM
Address Postal Code	11743
Address State	NY
Address Text	---

Alias 1 ---
Alias 2 ---
Alias 3 ---
Description ---
Location Number ---
Managing Organization Lamna Healt...
Operational Status ---
Mode ---

6. We will continue you to get to know the Healthcare Data Model by creating a new **Practitioner** record in the **Care Management** App
- a. Click **People** in the Sitemap
 - b. Ensure **Active Practitioners** view is selected as it loads by default "Active Patients" view.
 - c. Quick Create (+) New **Practitioner**

Dynamics 365 | Care Management

SANDBOX

Active Practitioners

Group By: (no grouping)

Full Name	Managing Organization	Email	Gender	Address 1	Mobile Phone
Abigail Jackson	---	Abigail.Jackson@cont...	Male	2312 HAMMERLY Street Stoneboro,...	555-555-0100
Adrian King	---	Adrian.King@cont...	Male	8772 STEMBRIDGE Lane Madera, P...	555-555-0100
Alex Johnson	---	Alex.Johnson@cont...	Male	8763 VIETS Court North Chili, NY 9...	555-555-0100
Jamie Evans	---	Jamie.Evans@cont...	Male	4533 AESCHLIMANN Court Homew...	555-555-0100
Jasmine Miller	---	Jasmine.Miller@con...	Male	4864 COSIO Court Church Creek, M...	555-555-0100

d. **Create** a new **Practitioner** record by filling out the following information:

- i. **Contact Type:** Practitioner
- ii. **First Name:** John
- iii. **Last Name:** Smith
- iv. **Email:** johnsmith@contosolab.com
- v. **Job Title:** General Practitioner
- vi. **Address:** 8143 Meadow Rd, New York, NY, 10031
- vii. **Mobile Phone:** (541) 754-3010
- viii. **Business Phone:** (441) 754-3010

e. Click **Save & Close**.

Quick Create: Contact X

Details

↑ Scan Business Card

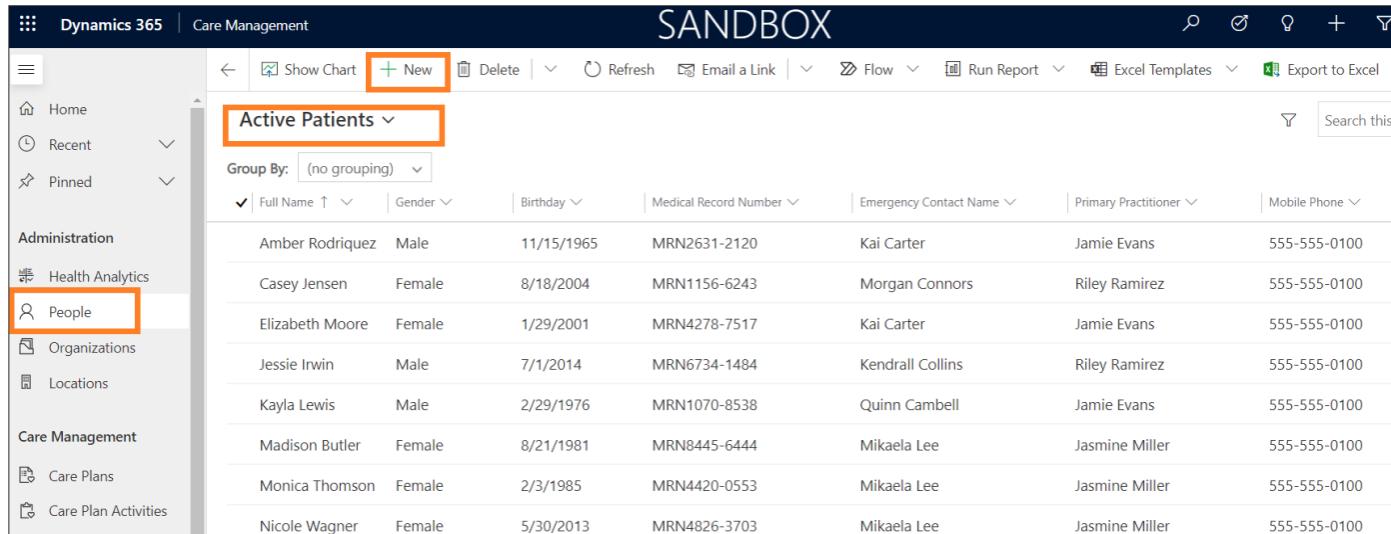
Contact Type	* Practitioner
First Name	+ John
Last Name	* Smith
Job Title	General Practitioner (GP)
Contact Information	
Email	Johnsmith@contosotestlab.com ✉
Mobile Phone	(541) 754-3010 📞
Business Phone	(441) 754-3010 📞
Description	---
Address	
Street 1	8143 Meadow Rd.

Save and Close ▼ Cancel

Task 3: Add Patient information in Care Management App

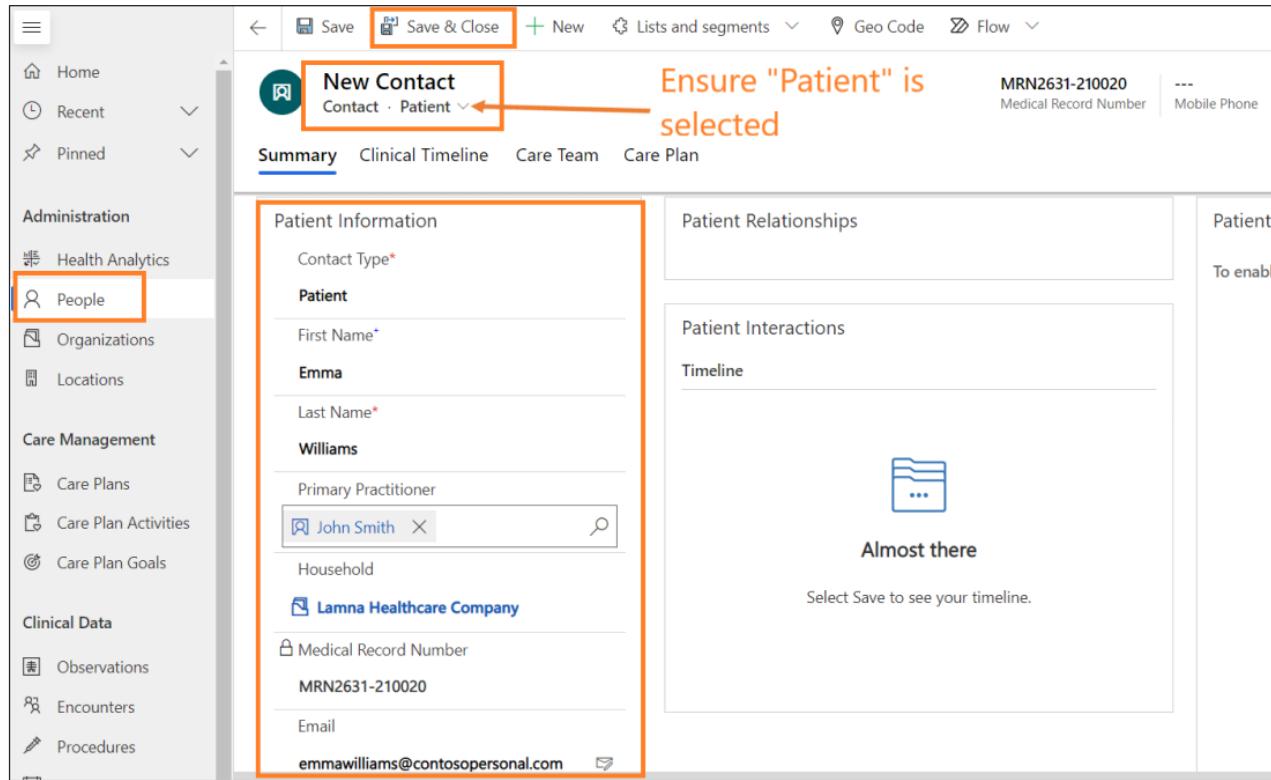
In this task you continue to walkthrough the Healthcare Data Model by creating a new **Patient** and **Patient Encounter** record in the **Care Management** app, then assigning it a **Care Plan** and a **Care Team** based on the patient's details.

1. Create a new **Patient** record in **Care Management** app by performing the following steps:
 - a. Navigate to the Sitemap on the left navigation panel and click **People**.
 - b. Click the **New** button.



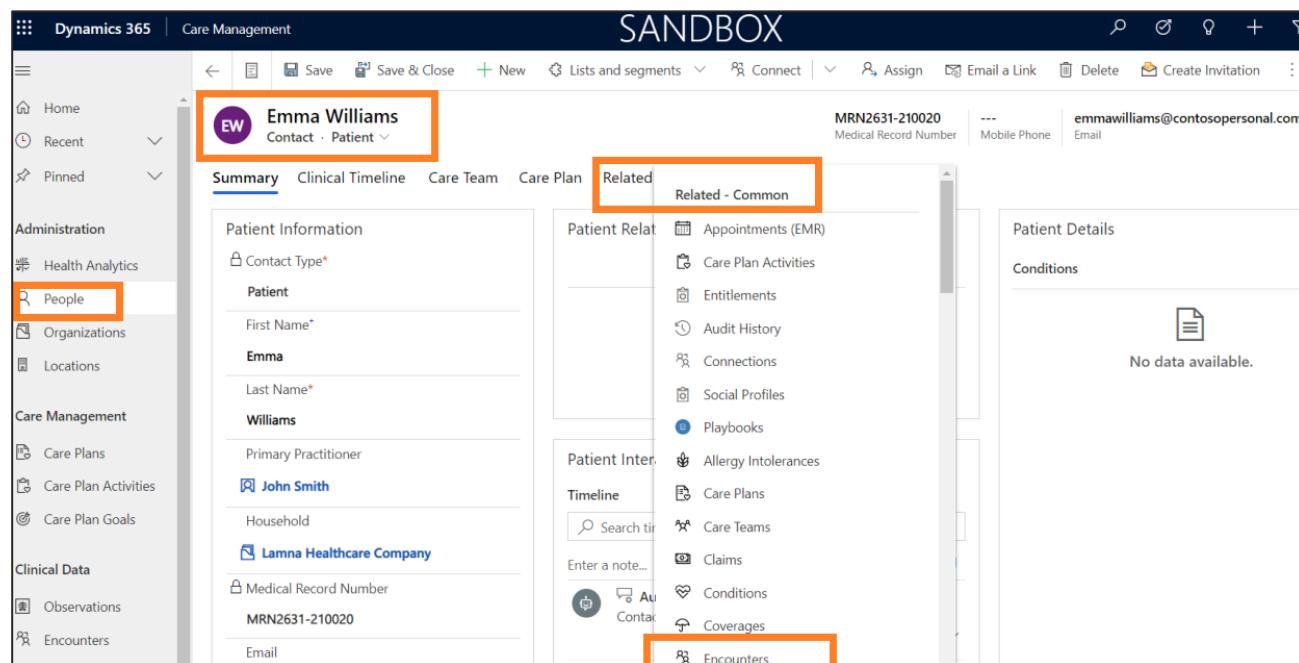
Full Name	Gender	Birthday	Medical Record Number	Emergency Contact Name	Primary Practitioner	Mobile Phone
Amber Rodriguez	Male	11/15/1965	MRN2631-2120	Kai Carter	Jamie Evans	555-555-0100
Casey Jensen	Female	8/18/2004	MRN1156-6243	Morgan Connors	Riley Ramirez	555-555-0100
Elizabeth Moore	Female	1/29/2001	MRN4278-7517	Kai Carter	Jamie Evans	555-555-0100
Jessie Irwin	Male	7/1/2014	MRN6734-1484	Kendall Collins	Riley Ramirez	555-555-0100
Kayla Lewis	Male	2/29/1976	MRN1070-8538	Quinn Campbell	Jamie Evans	555-555-0100
Madison Butler	Female	8/21/1981	MRN8445-6444	Mikaela Lee	Jasmine Miller	555-555-0100
Monica Thomson	Female	2/3/1985	MRN4420-0553	Mikaela Lee	Jasmine Miller	555-555-0100
Nicole Wagner	Female	5/30/2013	MRN4826-3703	Mikaela Lee	Jasmine Miller	555-555-0100

- c. Ensure the **Patient form** is selected, otherwise the first field might be locked.
- d. **Create** a new **Patient** record by filling out the following information:
 - i. **Contact Type:** Patient
 - ii. **First Name:** Emma
 - iii. **Last Name:** Williams
 - iv. **Primary Practitioner:** John Smith
 - v. **Household:** Lamna Healthcare Company
 - vi. **Medical Record Number:** MRN2631-210020
 - vii. **Email:** emmawilliams@contosopersonal.com
 - viii. **Address:** 4 Illinois Drive, Bronx, NY 10452, USA
 - ix. **Mobile Phone:** (561) 754-3010
 - x. **Business Phone:** 431) 754-3010
- e. Click **Save**.



2. Create new **Patient Encounter** information in the **Care Management**, Encounter Form

- While on the "Emma Williams" patient record, click **Related** Tab.
- In the Sub-menu, select **Encounters**.



- Click **New Encounter**
- Enter the following details for the new encounter:
 - Name:** Regular Test

- ii. **Patient:** Emma Williams
 - iii. **Status:** Planned
 - iv. **Start Date/Time:** Choose a date and time
 - v. **Priority:** Routine
 - vi. **Destination:** Contoso Blood Test Lab
- h. Click **Save & Close**.

Quick Create: Encounter X

General Information

Name	* Regular Test
Patient	*  Emma Williams
Status	* Planned

Start Date/Time	1/25/2021 
	8:00 AM 

Appointment (EMR)	---
-------------------	-----

Parent Encounter	---
------------------	-----

Additional Information

Priority	routine
Re admission	---

Destination	 Contoso Blood Test Lab
-------------	---

Context (Encounter)	---
---------------------	-----

Context (Episode of	---
---------------------	-----

Save and Close Cancel

3. We will continue our exploration of Patient 360 information by creating a new **Care Plan** and **Care Plan Team** for the Patient that we created in the previous step. In this step, we will create a **Care Plan** with one or more **Care Team member(s)** so that the whole care team can collaborate and provide better healthcare for the patient.

- a. While on the Patient record, **navigate** to the **Care Plan** tab and select **Add Care Plan**

The screenshot shows the Dynamics 365 Care Management interface for a patient named Emma Williams. The top navigation bar includes 'Dynamics 365' and 'Care Management'. The main header displays the patient's name, contact type (Contact · Patient), and various identifiers (MRN, phone number, email). Below the header, there are tabs: Summary, Clinical Timeline, Care Team, **Care Plan**, Encounters, and Related. The 'Care Plan' tab is highlighted with an orange box. The main content area shows three cards: 'Assigned Care Plans All Time' (0), 'Activities Complete New and Existing Care Plans' (0%), and 'Goals Complete New and Existing Care Plans' (0%). Below these cards is a section titled 'CARE PLANS' with a large circular icon containing a plus sign. At the bottom right of this section is a button labeled 'Add a New Care Plan'. A second orange box highlights this button. To its right is a blue button labeled 'Add Care Plan'.

- b. **Create** a new **Care Plan** record by filling out the following information:

- i. **Title and Description:** Emma Williams - Care Plan - for MRN2631-210020
- ii. **Status:** Active
- iii. **Start and End Dates:** Pick any
- iv. **Encounter:** Choose the Encounter that we created in the previous task.

- c. **Click Save and Close.**

Quick Create: Care Plan X

Key Information

Title	* Emma Williams - Care Plan - for MRN26...
Description	---
Patient	Emma Williams
Status	* Active

Timing Details

Start Date	2/15/2021
	8:00 AM
End Date	2/15/2021
	9:00 AM

Context

Episode of Care	---
Encounter	Regular Test

Save and Close | Cancel

- d. After saving the Care Plan, select it to open the record.

CARE PLANS

Filter By

Active

Emma Williams - Care Plan - for MRN26
0 Care Team Members

Last Modified: 2/12/2021 11:42 AM

Cancel Pause Complete

- e. Once the Care Plan record is open, select the **Care plan care teams** tab and click **New Care Plan Care Team**.

The screenshot shows the 'Care Plan Care Teams' page for 'Emma Williams - Care Plan - for MRN2631-210020'. The 'Care plan care teams' tab is selected. In the top right corner, there is a red box around the '+ New Care Plan Care Team...' button.

- f. To create the **Care Plan Care Team**, we need to create a **Care Team**. On the Care Team lookup field, click + New Care Team. A Quick Create form will pop out from the right side of the screen.

The screenshot shows the 'New Care Plan Care Team' quick create form. The 'Care Plan' dropdown is set to 'Emma Williams - Care Plan - for MRN2631-210020'. The '+ New Care Team' button is highlighted with a red box. An orange arrow points from the text 'Create Care Team' to this button.

- g. **Create** a new **Care Team** record by filling out the following information:

- i. **Name:** Emma Williams - Care Team - for MRN2631-210020
- ii. **Care Team Number:** 1
- iii. **Subject Type:** Patient
- iv. **Patient:** Find and select "Emma Williams" created previously
- v. **Care Team Status:** Proposed
- vi. **Context Type:** Encounter
- vii. **Encounter:** Regular Test (Create in the previous task)
- viii. **Period Start and Period End:** Pick Any Date

Quick Create: Care Team

General

Name	Emma Williams - Care Team - for MRN2...
Care Team Number	1
Subject Type	Patient
Patient	<input type="text" value="Emma Williams"/> <input type="button" value="X"/> <input type="button" value=""/>
Care Team Status	Proposed
Context Type	Encounter
Encounter	<input type="text" value="Regular Test"/> <input type="button" value=""/>
Additional Info	
Period Start	1/25/2021 <input type="button" value=""/>
Period End	2/27/2021 <input type="button" value=""/>
Entity Image	<input type="button" value="Upload an image"/> <input type="button" value=""/>
<input type="button" value="Save and Close"/> <input type="button" value="Cancel"/>	

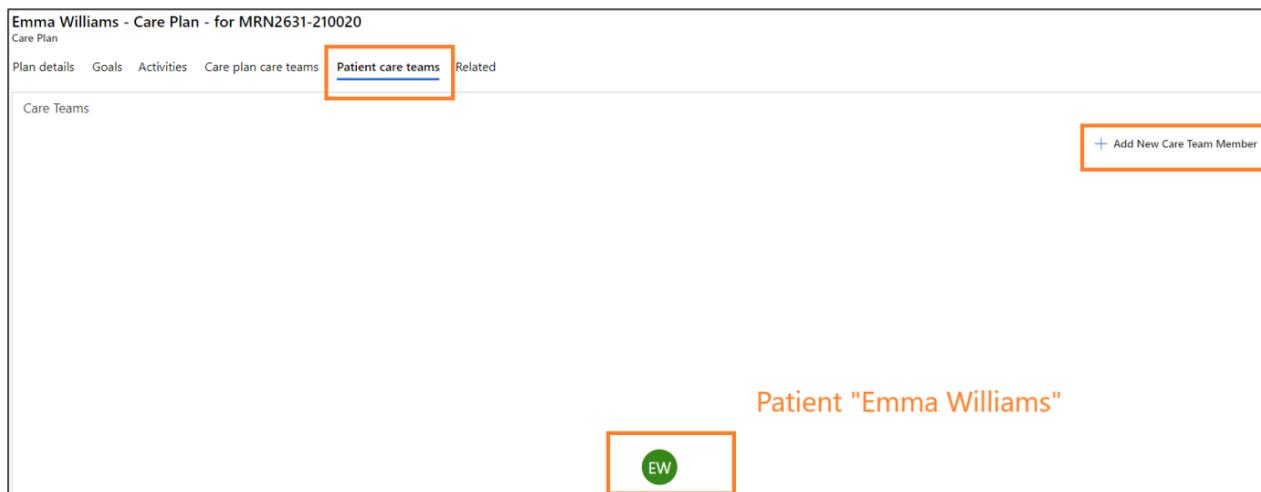
- i. Click **Save and Close** to save the care team.
- j. Click **Save and Close** to save the **Care plan care team** and return to the Care Plan record.

New Care Plan Care Team

General

Care Plan	<input type="text" value="Emma Williams - Care Plan - for MRN2631-210020"/> <input type="button" value=""/>
Care Team	<input type="text" value="Emma Williams - Care Team - for MRN2631-210020"/> <input type="button" value=""/>

4. After you create **Care plan care team**, you should be able to add new **Care Team Members** by selecting the **Patient care teams** tab and clicking **+Add New Care Team Member**



5. **Create** a new **Care Team Participant** record by filling out the following information:

- i. **Member Type:** Practitioner
- ii. **Practitioner:** John Smith
- iii. **Period Start and Period End:** Pick any date.

6. Click **Save and Close**.

Quick Create: Care Team Participant

General

Member Type	Practitioner
Practitioner	* <input type="text" value="John Smith"/> <input type="button" value="X"/>
Role	<input type="text" value="1, Hydroxy cholecalciferol"/>
Description	---
Period Start	1/25/2021 8:00 AM
Period End	1/26/2021 8:00 AM

Save and Close | Cancel

7. Repeat the steps above and **add** another **Practitioner (Adrian King)**, as a **Care Team Participant**.

Enter the following information:

- i. **Member Type:** Practitioner
- ii. **Practitioner:** Adrian King
- iii. **Period Start and Period End:** Pick any date.

8. Click **Save and Close**

Quick Create: Care Team Participant X

General

Member Type	Practitioner
Practitioner	* <input type="text" value="Adrian King"/> X 🔍
Role	<input checked="" type="checkbox"/> "1, Hydroxy cholecalciferol"
Description	---
Period Start	1/25/2021 📅 8:00 AM 🕒
Period End	1/30/2021 📅 8:00 AM 🕒

9. **Create** one more **Care Team Participant** record by filling out the following information:

- i. **Member Type:** Related Person
- ii. **Related Person:** Casey Jensen
- iii. **Period Start and Period End:** Pick any date.

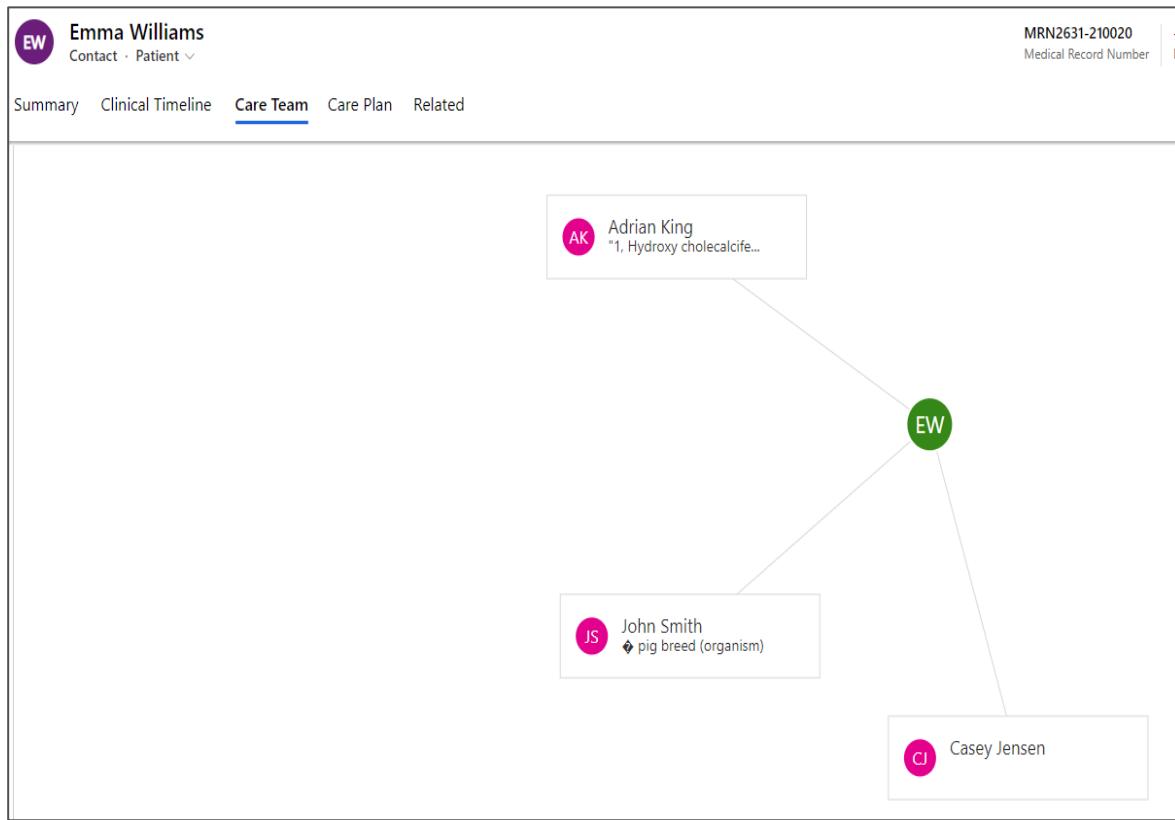
10. Click **Save and Close**

Quick Create: Care Team Participant X

General

Member Type	Related Person
Related Person	* <input type="text" value="Casey Jensen"/> X 🔍
Role	---
Description	---
Period Start	1/25/2021 📅 8:00 AM 🕒
Period End	1/29/2021 📅 8:00 AM 🕒

11. You will now see the complete Care Team that has been mapped to Emma Williams.



Congratulations! In this Task, you have learned how to create a new **Patient** and **Patient Encounter** record in the **Care Management** app, then assigned it a **Care Plan** and a **Care Team** based on the patient's details.

Task 4: View Patient Clinical Data, Care Plan and Timeline

In this task, we will look at a patient's medical history, activities, clinical timeline, and procedure details in the Care Management app to see a full 360 view of the patient.

1. Click **People** on the sitemap, select the **Active Patients** view, and search for **Casey Jensen**.

The screenshot shows the 'Active Patients' view in the Care Management app. On the left is a sidebar with links: Home, Recent, Pinned, Administration, Health Analytics, People (which is highlighted with a red box), Organizations, Locations, Care Management, and Care Plans. The main area is titled 'Active Patients' with a dropdown menu. It includes a search bar with 'Casey Jensen' and a magnifying glass icon. Below the search bar are filter options: 'Group By: (no grouping)' and sorting columns: Full Name ↑, Gender, Birthday, Medical Record Number, Emergency Contact Name, Primary Practitioner, and Mobile Phone. The table lists the following patients:

Full Name	Gender	Birthday	Medical Record Number	Emergency Contact Name	Primary Practitioner	Mobile Phone
Amber Rodriguez	Male	11/15/1965	MRN2631-2120	Kai Carter	Jamie Evans	555-555-0100
Casey Jensen	Female	8/18/2004	MRN1156-6243	Morgan Connors	Riley Ramirez	555-555-0100
Elizabeth Moore	Female	1/29/2001	MRN4278-7517	Kai Carter	Jamie Evans	555-555-0100
Jessie Irwin	Male	7/1/2014	MRN6734-1484	Kendrall Collins	Riley Ramirez	555-555-0100
Kayla Lewis	Male	2/29/1976	MRN1070-8538	Quinn Cambell	Jamie Evans	555-555-0100
Madison Butler	Female	8/21/1981	MRN8445-6444	Mikaela Lee	Jasmine Miller	555-555-0100
Monica Thomson	Female	2/3/1985	MRN4420-0553	Mikaela Lee	Jasmine Miller	555-555-0100

2. Open the “Casey Jensen” record to view the **Patient Relationships**, **Patient Details** and **Patient Interactions**.

The screenshot shows the Microsoft Cloud for Healthcare interface. On the left, there's a navigation bar with links like Home, Recent, Pinned, Administration, Health Analytics, People, Organizations, and Locations. The main area is titled "Active Patients" and shows a list of patients. A row for "Casey Jensen" is selected, displaying details: Female, Birth Date 8/18/2004, Medical Record Number MRN1156-6243, Emergency Contact Morgan Connors, Primary Practitioner Riley Ramirez, and Phone 555-555-0100.

The main content area is the "Casey Jensen" patient record page. It has tabs for Summary, Clinical Timeline, Care Team, Care Plan, and Related. The "Summary" tab is active. The page is divided into several sections:

- Patient Information:** Includes fields for Contact Type (Patient), First Name (Casey), Last Name (Jensen), Primary Practitioner (Riley Ramirez), Medical Record Number (MRN1156-6243), Email (Casey.Jensen@contoso.com), Home Phone (555-555-0100), Mobile Phone (555-555-0100), Business Phone (423-555-0100), Contact Method (Any), and Gender (Female).
- Patient Relationships:** Shows a list of related persons: Jordan Mitchell (555-555-0100, Jordan.Mitchell@contoso.com), Kai Carter (555-555-0100, Kai.Carter@contoso.com), and Ana Bowman (555-555-0100, Ana.Bowman@contoso.com).
- Patient Details:** Shows a list of conditions: Arthritis - for MRN21 (Casey Jensen, Onset Date 10/26/2020), Asthenia - for MRN02 (Casey Jensen, Onset Date 11/9/2020), Celiacs disease - for # (Casey Jensen, Onset Date 11/18/2020), and Dehydration - for MR (Casey Jensen, Onset Date 10/12/2020).
- Patient Interactions:** Shows a timeline of interactions. Three entries are listed as "Overdue": "Appointment (EMR) from SYSTEM" (Casey Jensen - Appointment for MRN0623-5573, Onset Date 11/7/2020 1:29 AM), "Appointment (EMR) from SYSTEM" (Casey Jensen - Appointment for MRN1007-5238, Onset Date 11/7/2020 1:27 AM), and "Appointment (EMR) from SYSTEM" (Casey Jensen - Appointment for MRN3482-4655, Onset Date 10/22/2020 7:40 PM).

3. Click the **Clinical Timeline** tab to show data with regards to Care Plan, Medication Request, procedures, Task, and Conditions etc. Choose a date 20 days in the past to see data similar to the view below.

change to past date
(example: 20 days before)

Jump to date: Tue December 29th 2020

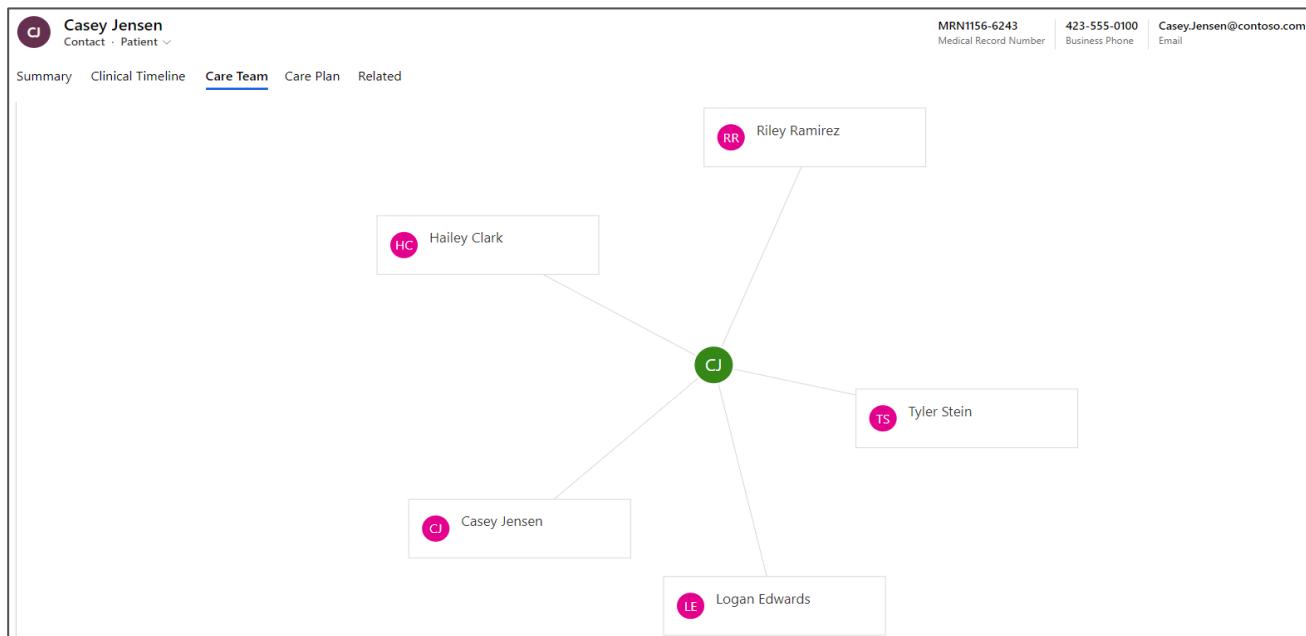
Filter by: Condition, Encounter, Care Plan, Allergy ...

Types:

- Appointment (EMR)**: Casey Jensen - Appoint...
- Care Plan**: Casey Jensen - Care Plan ...
Casey Jensen - Descriptio...
- Encounter**: Patient Encounter - Case...
Patient Encounter - Casey...
- Medication Request**: treaterset 50mg
treaterset 50mg
- Procedure**: Skin Clear Ups
Skin Clear Ups
- Task**: 25184213
76668415
Follow up with Dr on Enc...
Follow up with Dr on Enc...

Note: Data may change based on the frequent data load, if you are not able to see the above timeline view, then you may need jump to an older date.

- Select the **Care Team** tab to see all the team members participants of Patient "Casey Jensen" (patient abbreviation "CJ" shown in the center)



- Select the Care Plan tab to view all the associated **Care Plan** details with **status** for patient "Casey Jensen". The below "Care Plan" stats are displaying the Number of Assigned Care Plans, Activities Complete, Goals Complete etc.

The screenshot shows the Care Plan section of the Microsoft Care Management application. At the top, there are three cards: 'Assigned Care Plans All Time' (8), 'Activities Complete New and Existing Care Plans' (6%), and 'Goals Complete New and Existing Care Plans' (0%). Below these are five care plans for different patients, each with a summary, last modified date, and three buttons: Cancel, Pause, and Complete. A 'New Care Plan' button is located in the top right corner.

Casey Jensen - Care Plan - for MRN4301	Casey Jensen - Care Plan - for MRN081	Casey Jensen - Care Plan - for MRN643	Casey Jensen - Care Plan - for MRN5101	Casey Jensen - Care Plan - for MRN0571	
4 Care Team Members HC, RR, TS, LE	4 Care Team Members HC, RR, TS, LE	4 Care Team Members HC, RR, TS, LE	4 Care Team Members HC, RR, TS, LE	4 Care Team Members HC, RR, TS, LE	
Last Modified: 10/23/2020 7:42 PM	Last Modified: 10/23/2020 7:42 PM	Last Modified: 10/23/2020 7:42 PM	Last Modified: 10/23/2020 7:42 PM	Last Modified: 10/23/2020 7:42 PM	
Cancel	Pause	Complete	Cancel	Pause	Complete

The screenshot shows the Care Plan Activities section of the Microsoft Care Management application. The 'Care Plan' tab is highlighted with an orange box. Below it, there are two columns of care plan activities, each with a summary, last modified date, and three buttons: Cancel, Pause, and Complete. At the bottom, there is a table titled 'Care Plan Activities' with columns for Name, Description, Care Plan, Activity Status, and Activity End Date. The entire 'Care Plan Activities' section is also highlighted with an orange box.

Name	Description	Care Plan	Activity Status	Activity End Date
Care Plan Activity - Casey Jensen - for MRN8578- ---		Casey Jensen - Care Plan - for MRN8578-7516	Scheduled	11/17/2020
Care Plan Activity - Casey Jensen - for MRN1750- ---		Casey Jensen - Care Plan - for MRN1750-2720	Scheduled	11/24/2020
Care Plan Activity - Casey Jensen - for MRN1750- ---		Casey Jensen - Care Plan - for MRN1750-2720	Scheduled	12/29/2020
Care Plan Activity - Casey Jensen - for MRN4306- ---		Casey Jensen - Care Plan - for MRN4306-4012	Cancelled	12/8/2020

Congratulations! You have learned how to navigate, view, and create Patient 360 data in the Care Management application.

Exercise 2: Extend Care Management App

In this exercise, we will see how a **System Customizer** can customize and extend the **Care Management App**.

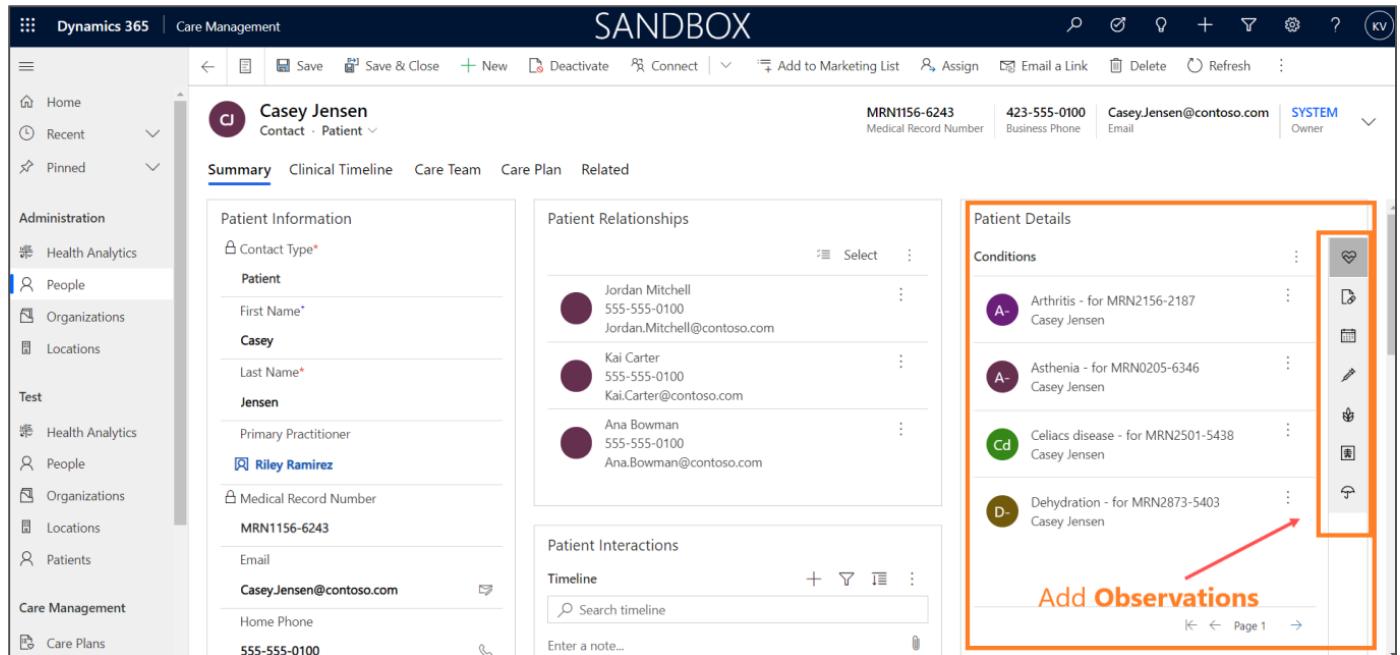
Note: User must have a System Customizer or System Administrator security role to complete this exercise. If you are in an official training, this has already been applied to your user.

You will do the following tasks in this exercise:

1. Add **Observation** data on the Patient form in patient details section. This allows the Care coordinator to see essential clinical data in one place, including conditions, procedures, allergy intolerance and observations for the patient.
2. Add the **Claims** table to the Sitemap, which will allow the Care coordinator to quickly check recent claims information for patients.
3. Customize **Care Plan** with Filter and Group by Option with Patient: with this customization, Care Coordinator will be able to filter and pivot **Care Plan** data by Patient.

Task 1: Add Patient Observations data on the Patient form

In this task we will add related **Observations** data for the Patient to the form to gain a deeper understanding of the selected patient.



1. Edit the **Care Management App**
 - a. Navigate to [Power Apps](#).
 - b. Select **Apps** and highlight the **Care Management App**.
 - c. Go to more Commands by clicking ... and then click **Edit**.

The screenshot shows the Microsoft App Service portal interface. On the left, a sidebar lists categories: Home, Learn, Apps (which is selected and highlighted with an orange border), Create, Data, Flows, Chatbots, AI Builder, and Solutions. The main area is titled 'Apps' and shows a list of apps. An orange warning bar at the top states: '⚠️ 6 environment variables need to be updated. See environment variables'. The app list includes:

Name	Modified
Customer Service Hub	5 d ago
Patient Service Center	1 wk ago
Customer Service workspace	1 wk ago
Care Management	1 mo ago
FHIR Sync Agent Administration	
Home Health	
Care Team Member	
Patient Outreach	
Healthcare Administration	

A context menu is open over the 'Edit' button for the 'Care Management' app, listing options: Edit (highlighted with an orange border), Play, Share, Monitor, Delete, and Settings.

2. Edit Patient form by scrolling down until you find Contact Table

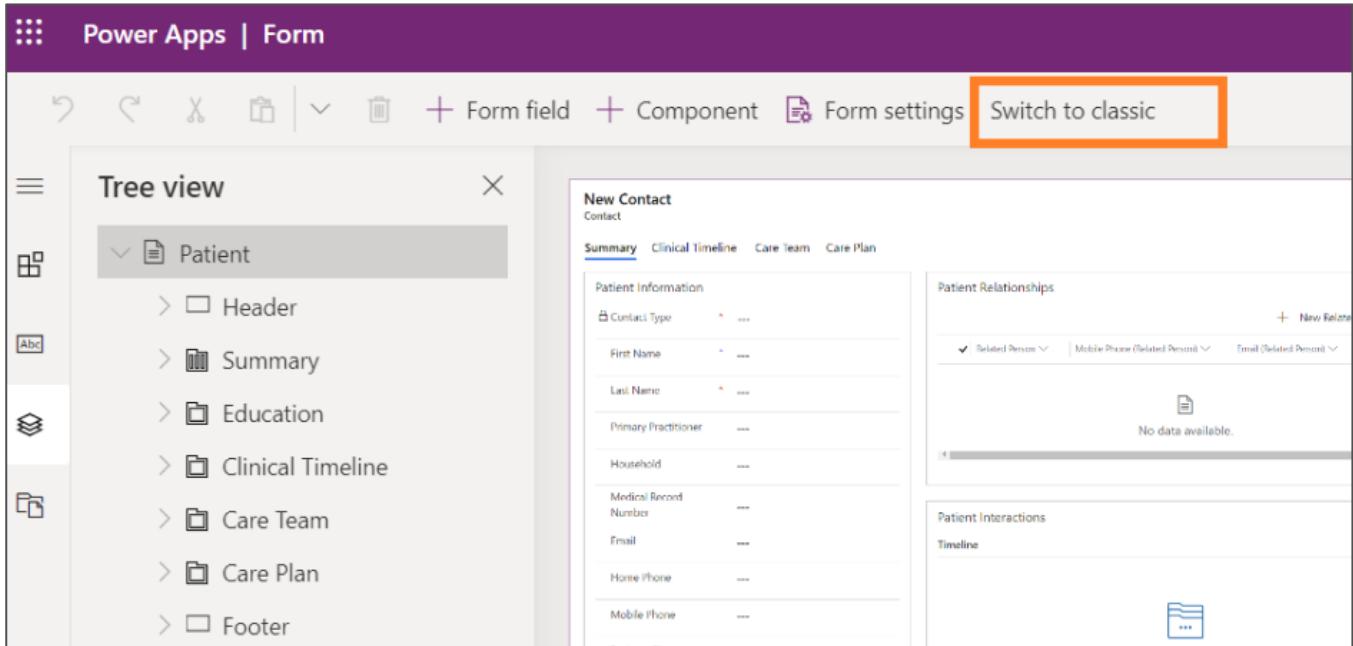
- Click **Forms** (this will list all the Forms under Contact Table).
- Select **Patient** and click the **Edit Pen Icon** (refer to picture below).

The screenshot shows the App Designer canvas for the 'Care Management' app. The canvas displays a grid of components. A red arrow points from the 'Edit' button in the previous screenshot to the 'Patient' form in the canvas. The 'Patient' form is highlighted with an orange border. The right-hand panel shows the 'Components' tab, where 'Patient' is selected. A tooltip says: 'Click "Edit" This form is used by the portal to in'. The 'Properties' tab is also visible.

3. The Power Apps model-driven **Form Designer** should have opened.

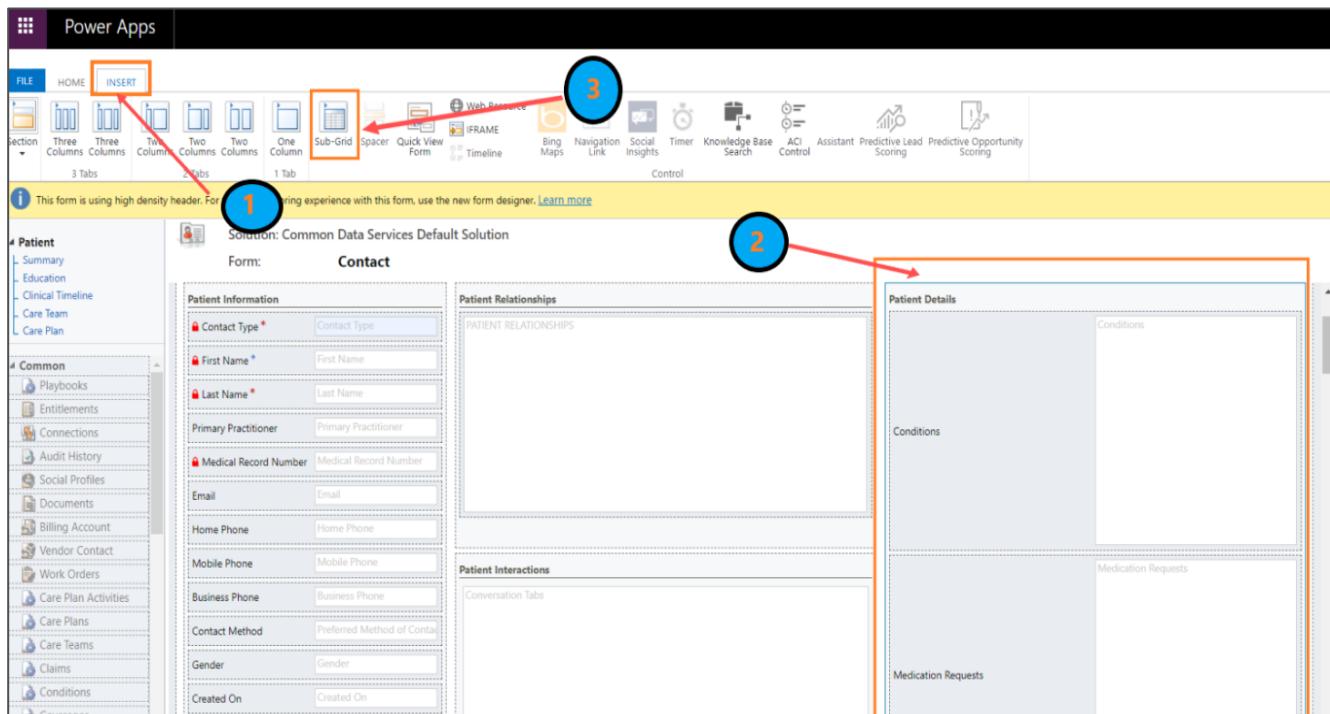
Note: Currently, Power Apps >> Form Designer does not support this PCF control customization, we will use the Classic Editor to Customize this PCF Control. Later we will change back to use the Power Apps Form Designer for this customization when there is a support.

4. Click “Switch to Classic” button (refer to the picture below).



5. Customize the Patient Form to add **Observations** control under **Patient Details** Panel

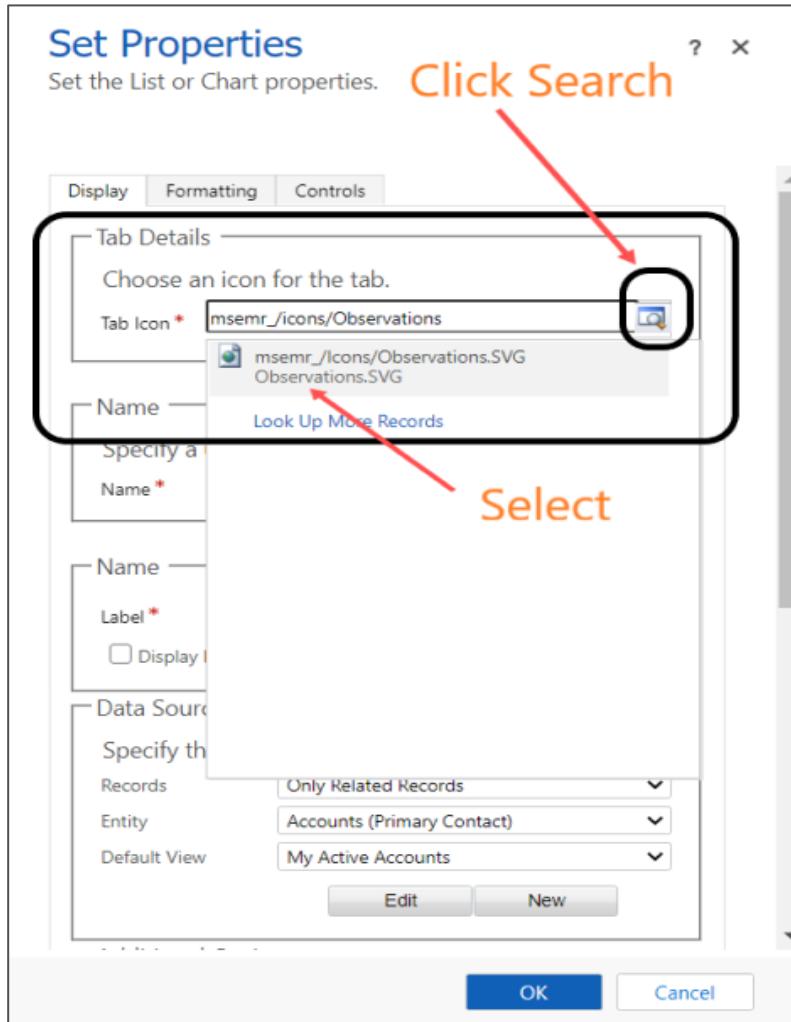
- Select the **Patient Details** Tab Panel
- Select the **Insert** tab, then select **Sub-Grid**.



6. This will open the **Set Properties** window. Fill out the below values:

a. Tab Details Section:

- i. **Tab Icon** – msemr/_icons/Observations
- ii. **Click “Search”** and select the record.



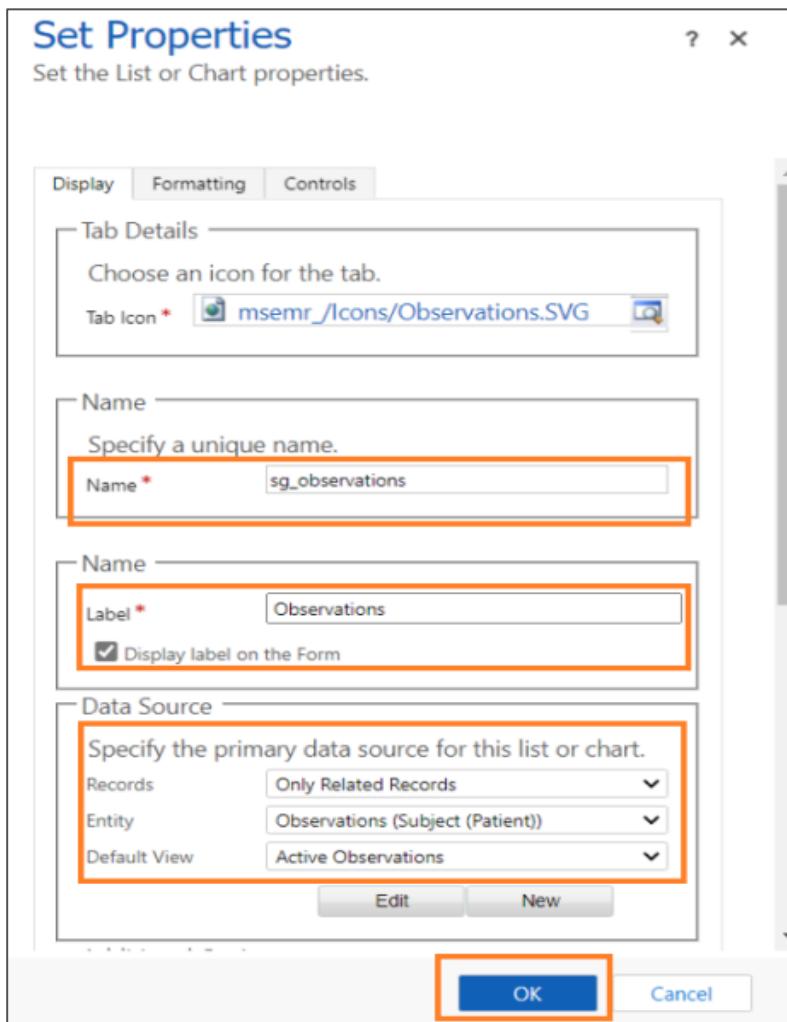
7. Name Section:

- a. **Name** – sg_observations
- b. **Label** – Observations (Select **checkbox “Display Label on the Form”**)

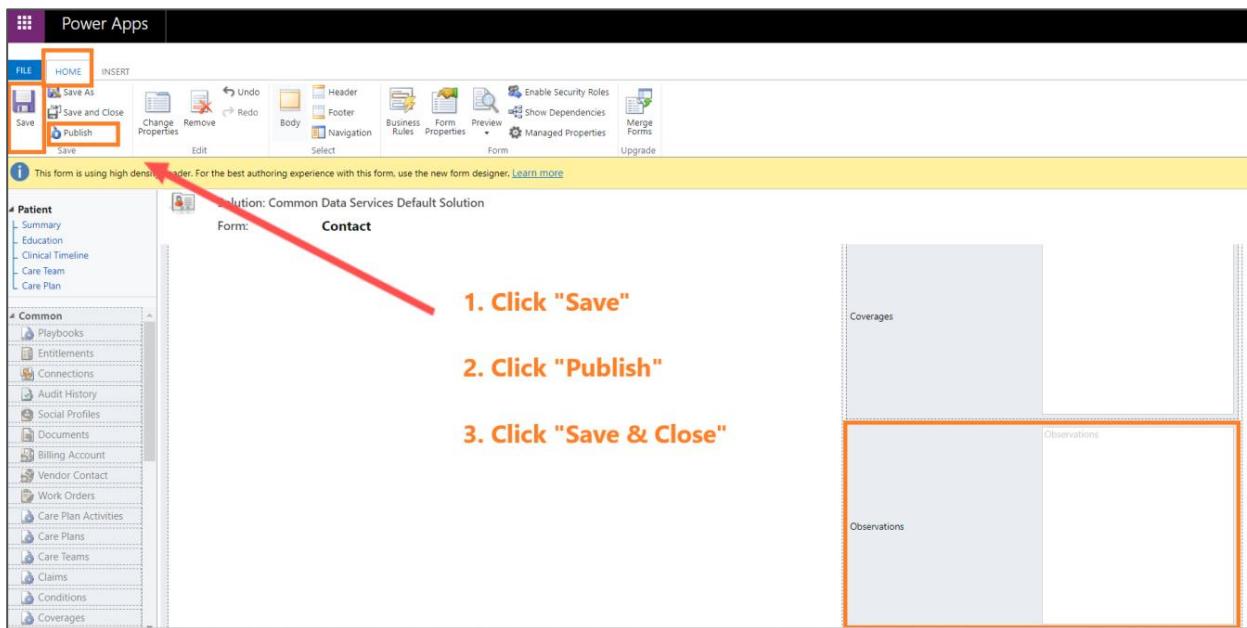
8. Data Source section:

- a. **Records** - Only Related Records
- b. **Entity** - Observations (Subject (Patient))
- c. **Default View** – Active Observations

9. After all details are entered, click **OK**



4. You should now see the **Observations** sub-grid added into the Patient Form (refer to the picture below). Select the **Home tab** and click **Save** and then click **Publish** to publish the customization changes.



10. Verify the **Observations** data was added to the **Patient** Form:

- Open the **Care Management app**
- Select **People** on the sitemap and select a **Patient**.
- Cross check that **Observations** was added to the **Patient Details**.
- Click **Observations Icon** to see the **Patients Observations** data

The screenshot shows the Microsoft Power Platform canvas app interface for the Care Management app. At the top, it displays the patient's name, Casey Jensen, and contact information. Below the header, there are tabs for Summary, Clinical Timeline, Care Team, Care Plan, and Related. The Summary tab is selected. In the main content area, there are three sections: Patient Information, Patient Relationships, and Patient Details. The Patient Details section contains a table titled 'Observations' with several rows of data. One row is highlighted with a red border. To the right of the table is a vertical toolbar with various icons. The 'Edit' icon in this toolbar is also highlighted with a red border.

Congratulations! You have successfully added **Observation** data under the **Patient Details** section.

Task 2: Add Claims data to the Sitemap in Care Management app

The **Care Coordinator** wants to see the Patient 360 data for each patient, Care Coordinator would like to see all the Patient **Claims** data.

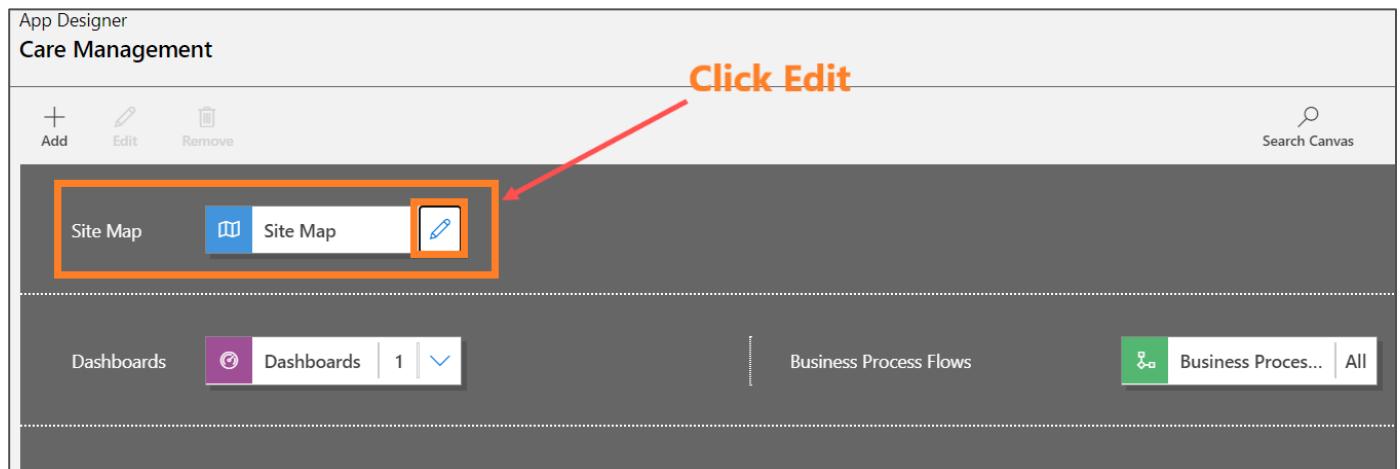
In this task, you will learn how to add a new table within the sitemap of the Care Management application.

1. Edit Care Management App:

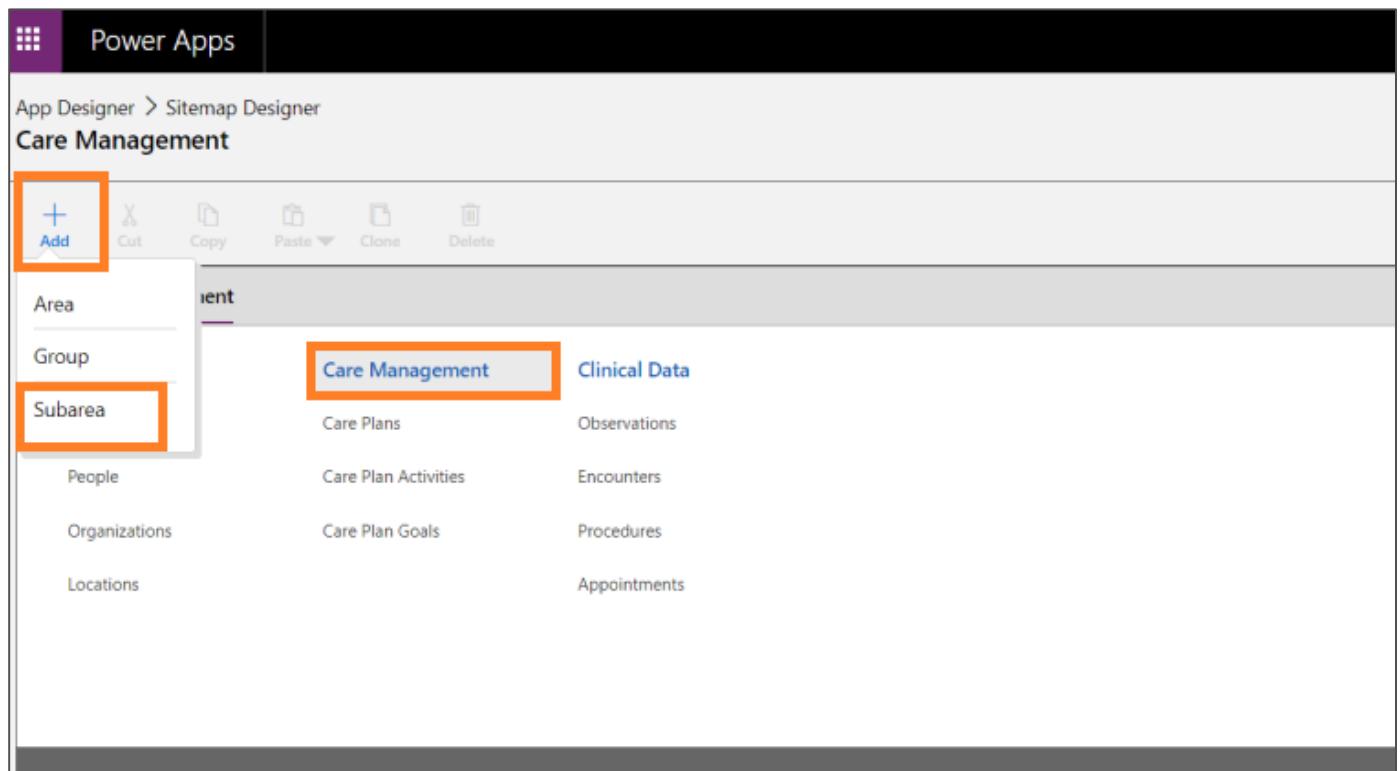
- Navigate to [Power Apps](#).
- Select **Apps** and highlight the **Care Management** App.
- Go to more Commands by clicking ... and then click **Edit**.

The screenshot shows the Microsoft Power Apps portal. On the left, there is a navigation sidebar with options like Home, Learn, Apps (which is selected and highlighted with an orange border), Create, Flows, Chatbots, AI Builder, and Solutions. The main area is titled 'Apps' and shows a list of apps. One app, 'Care Management', is highlighted with an orange border. To the right of the app list, there is a context menu for the 'Care Management' app, also highlighted with an orange border. The menu items include Edit, Play, Share, Monitor, Delete, and Settings. The 'Edit' option is specifically highlighted with a red border.

2. Click **Site Map** and then click the **Edit Pen Icon** (refer to picture below).



- a. Ensure “**Care Management**” is selected, then click the **Add** button and then click **Subarea**.



- b. In the **Property window**, choose **Claim** from the Entity drop-down menu.
c. Click **Save**, then click **Publish**.
d. Click **Save & Close**.

The screenshot shows the Microsoft App Designer Sitemap Designer interface. In the center, there's a grid of items under the 'Care Management' section. The 'Claims' item is highlighted with an orange box. To the right, the 'Properties' panel is open, showing settings for a 'SUB AREA'. Under the 'General' tab, the 'Entity' dropdown is set to 'Claim', which is also highlighted with an orange box.

3. Navigate back to the **Care Management app** to verify that **Claims** has been added under the **Care Management** section.

The screenshot shows the Dynamics 365 Care Management app interface. On the left, the sidebar has a 'Care Management' section with several items: Care Plans, Care Plan Activities, Care Plan Goals, and Claims. The 'Claims' item is highlighted with an orange box. The main area displays a grid titled 'Active Claims' with various columns like Name, Type, Patient, Organization, Insurer, Hospitalization Start, and Hospitalization End. The grid lists multiple claims entries.

Name	Type	Patient	Organization	Insurer	Hospitalization Start	Hospitalization End
Insurance Claim - Broken Ankle - Amber Rodriguez	---	Amber Rodriguez	Proseware, Inc.	---	11/9/2020	11/12/2020
Insurance Claim - Broken Hand - Elizabeth Moore	---	Elizabeth Moore	Proseware, Inc.	---	11/2/2020	11/8/2020
Insurance Claim - Broken Jaw - Reed Flores	---	Reed Flores	Proseware, Inc.	---	10/9/2020	10/15/2020
Insurance Claim - Broken Jaw - Renata Hall	---	Renata Hall	Lamna Healthcare & Fabrikam Inc	---	11/4/2020	11/8/2020
Insurance Claim - Broken Leg - Nicole Wagner	---	Nicole Wagner	Lamna Healthcare & Fabrikam Inc	---	10/18/2020	10/25/2020
Insurance Claim - Broken Toe - Amber Rodriguez	---	Amber Rodriguez	Proseware, Inc.	---	10/18/2020	10/28/2020
Insurance Claim - Broken Toe - Monica Thomson	---	Monica Thomson	Lamna Healthcare & Fabrikam Inc	---	11/24/2020	11/25/2020
Insurance Claim - Broken Tooth - Remy Morris	---	Remy Morris	Lamna Healthcare & Fabrikam Inc	---	11/7/2020	11/18/2020
Insurance Claim - Bruised Bone - Reed Flores	---	Reed Flores	Proseware, Inc.	---	11/18/2020	11/23/2020
Insurance Claim - Foot Fracture - Jessie Irwin	---	Jessie Irwin	Proseware, Inc.	---	10/10/2020	10/19/2020
Insurance Claim - Head Trauma - Elizabeth Moore	---	Elizabeth Moore	Proseware, Inc.	---	11/13/2020	11/22/2020
Insurance Claim - Head Trauma - Rowan Murphy	---	Rowan Murphy	Lamna Healthcare & Fabrikam Inc	---	11/9/2020	11/18/2020

Congratulations! You have customized the Sitemap to add **Claims** to the Care Management section.

Task 3: Add an Editable Grid to Care Plans

In this task, we will add an editable grid to the Care Plan table. With editable grids, users can do rich in-line editing directly from grids and subgrids whether they are using a web app, tablet, or phone.

1. Edit **Care Management App**:
 - a. Navigate to [Power Apps](#).
 - b. Select **Apps** and highlight the **Care Management** App.

- c) Go to more Commands by clicking ... and then click **Edit**.

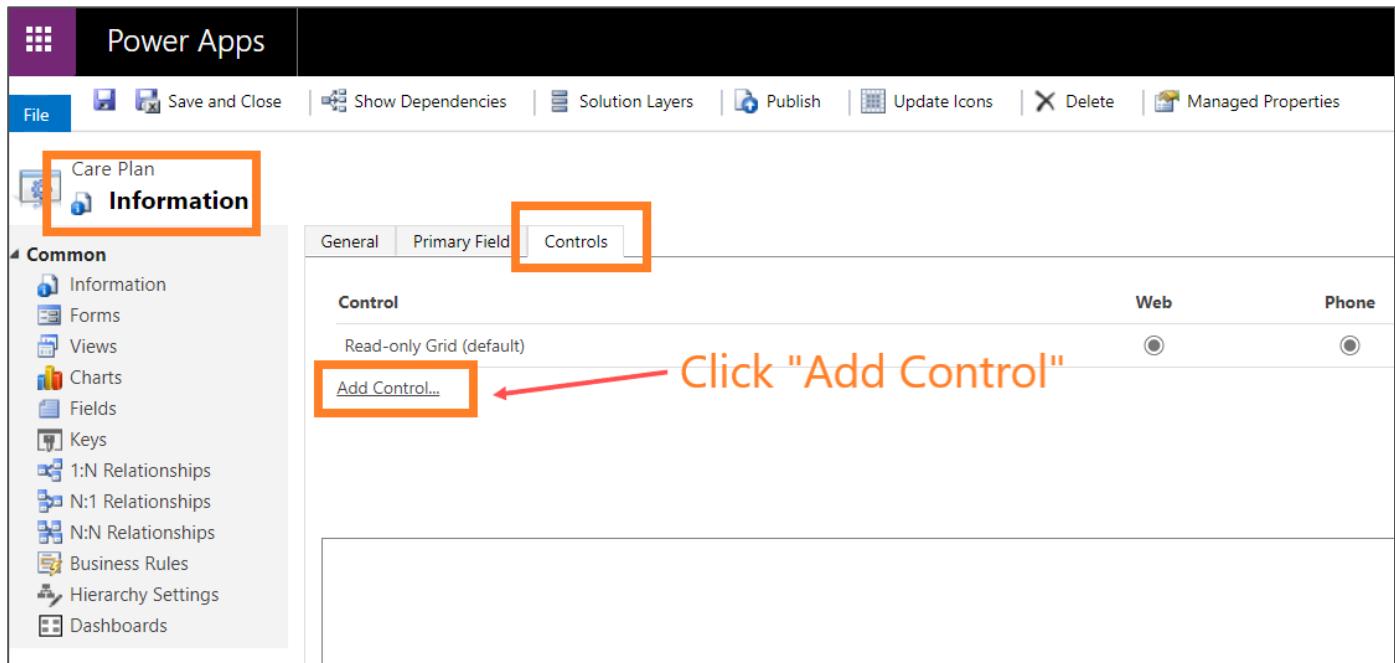
The screenshot shows the Microsoft Power Apps portal. On the left, there's a navigation sidebar with options like Home, Learn, Apps (which is selected and highlighted with an orange box), Create, Data, Flows, Chatbots, AI Builder, and Solutions. The main area is titled 'Apps' and shows a list of components under 'Component libraries (preview)'. One item, 'Care Management', is highlighted with an orange box. To its right, there's a context menu with options: ... (ellipsis), Edit (which is also highlighted with an orange box), Play, Share, Monitor, Delete, and Settings.

2. Select **Care Plan** and click the **Edit** button to navigate to the table customization page.

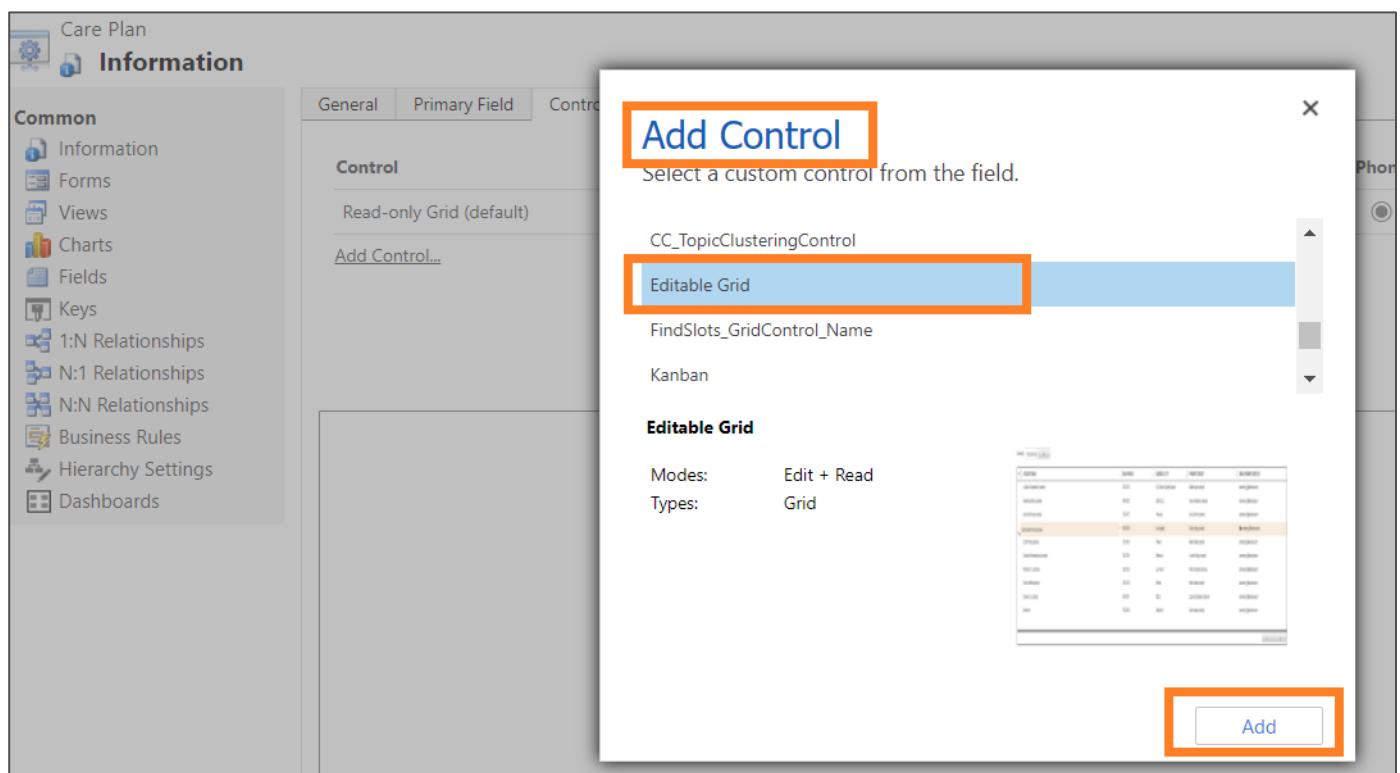
The screenshot shows the Microsoft App Designer interface for the 'Care Management' entity view. At the top, there's a toolbar with 'Add', 'Edit' (highlighted with an orange box and a red arrow pointing to it), and 'Remove'. Below the toolbar, there's a section titled 'Entity View (22)' containing several cards for different entities: Account, Allergy Int..., Appointm..., and Care Plan. The 'Care Plan' card is also highlighted with an orange box. The 'Edit' button is located in the top right corner of the 'Entity View' section.

3. Select **Care Plan** and click **Edit** to navigate to additional **Care Plan** Table customizations

- a. Select the **Control tab** as marked in the below picture and click **Add Control**.



- Select “**Editable Grid**” control from Customer Control section
- Click “**Add**” button to add the “**Editable Grid**” into the **Care Plan** Table



- You have now added an **Editable Grid** with both **web** and **tablet** properties enabled.

The screenshot shows the Microsoft Power Platform canvas app editor interface. On the left, there's a navigation pane with 'Care Plan' and 'Information' selected. The main area has tabs: 'General', 'Primary Field', 'Controls' (which is highlighted with a red box), and 'Events'. Under the 'Control' section, 'Editable Grid' is selected. Below it, there are properties for 'Grid view' (with 'Add Lookup' and 'Nested grid view' options) and 'Nested grid parent ID'. At the bottom, there's a 'Group by Column *' property with a value of 'Enabled (Enum)'. The top right corner says 'Working on solution:'.

- e. Click the **Save** button to save the changes, then click **Publish** to publish the changes.

The screenshot shows the Power Apps canvas app editor interface. The top navigation bar includes 'File' (highlighted with a red box and labeled 1), 'Save and Close', 'Show Dependencies', 'Solution Layers', 'Publish' (highlighted with a red box and labeled 2), 'Update Icons', 'Delete', and 'Managed Properties'. The 'Working on solution' status is shown at the top right. The left sidebar lists 'Common' categories like Information, Forms, Views, Charts, Fields, Keys, and various relationship types. The main content area is identical to the previous screenshot, showing the 'Information' page with the 'Editable Grid' control selected.

- f. Verify your changes by navigating back to the Care Management ap and adding a **Group By** option in the "Active Care Plan" view. With this option, a Care Coordinator would be able to view Care Plan records by **patients, context type** etc.

The screenshot shows the Dynamics 365 Care Management interface. The left sidebar has sections for Home, Recent, Pinned, Administration, Health Analytics, People, Organizations, Locations, Care Management (with 'Care Plans' highlighted), Care Plan Activities, Care Plan Goals, Claims, and Clinical Data. The main area is titled 'Active Care Plans' and 'By patient'. A dropdown menu 'Group By' is set to 'Patient'. The grid lists care plans for three patients: Amber Rodriguez, Casey Jensen, and Elizabeth Moore. Each row contains the care plan title, author, start date, end date, subject type, and context type.

Row	Patient	Title	Author	Start Date	End Date	Subject Type	Context Type
1	Amber Rodriguez	Casey Jensen - Care Plan - for MR...	Casey Jensen	11/15/2020 1:54 PM	11/30/2020 1:54 PM	Patient	Encounter
2	Amber Rodriguez	Casey Jensen - Care Plan - for MR...	Casey Jensen	11/1/2020 4:46 PM	11/16/2020 4:46 PM	Patient	Encounter
3	Amber Rodriguez	Casey Jensen - Care Plan - for MR...	Casey Jensen	10/9/2020 3:33 PM	10/24/2020 3:33 PM	Patient	Encounter
4	Amber Rodriguez	Casey Jensen - Care Plan - for MR...	Casey Jensen	10/10/2020 1:47 A...	10/25/2020 1:47 A...	Patient	Encounter
5	Amber Rodriguez	Casey Jensen - Care Plan - for MR...	Casey Jensen	11/28/2020 5:03 PM	12/13/2020 5:03 PM	Patient	Encounter
6	Amber Rodriguez	Casey Jensen - Care Plan - for MR...	Casey Jensen	10/14/2020 12:09 ...	10/29/2020 12:09 ...	Patient	Encounter
7	Casey Jensen	Casey Jensen - Care Plan - for MR...	Casey Jensen	11/13/2020 9:47 PM	11/28/2020 9:47 PM	Patient	Encounter
8	Casey Jensen	Casey Jensen - Care Plan - for MR...	Casey Jensen	10/17/2020 7:29 A...	11/1/2020 7:29 AM	Patient	Encounter
9	Elizabeth Moore						

Congratulations! You have customized an **Active Care Plan** view by adding an editable grid with additional filters to pivot **Care Plan** data by **Patient**.

Summary

Congratulations! You have completed **Lab 01: Care Management**.

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

Care Coordinator:

- **Navigate** and view Patient 360 data on the dashboard.
- Onboard a new branch location for Lamna healthcare company.
- **Understand the data model** for Practitioner and Patient records and assign Care Plans and Care Teams.
- Navigate patient records to discover their clinical data including Encounters, Medication Requests, Care Plans, Care Timelines, Care Plan Activities etc.

System Customizer:

- **Extend** and customize Care Management App to enable Care Coordinator to provide better care to patients.
- Add Observation data on the Patient form in patient details section.
- Add Claim detail on the Sitemap.
- Customize Care Plan to filter and pivot Care Plan data by Patient.

Lab Survey

We would appreciate your feedback on Microsoft Cloud for Healthcare in a Day and this hands-on-lab, such as the quality of documentation and the usefulness of the learning experience.

Please use the survey at <https://aka.ms/MCHIADSurvey> to share your feedback.

You may provide feedback for each module as you complete it or at the end once you've completed all the modules. Thank you!

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