Microsoft Cloud for Healthcare in a Day

Lab 06: Virtual Visits

Step-by-Step Lab

60 minutes

January 2022

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Overview

Learning Objectives

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

* Configure the Virtual Clinic app
* Configure Microsoft Teams for virtual visits
* Schedule a virtual visit in the Patient Portal

Prerequisites

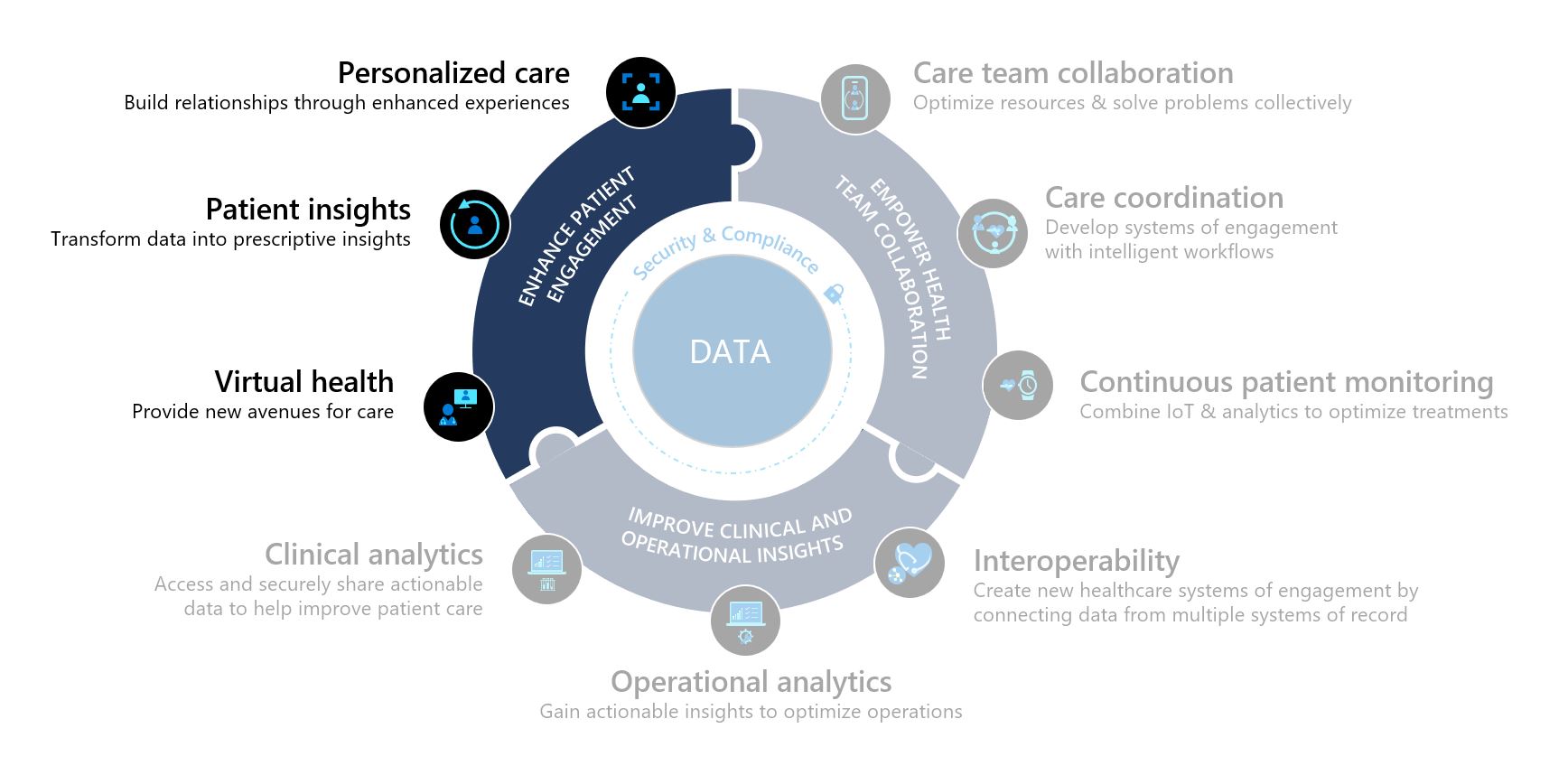
* None

Virtual Clinic Application

Microsoft Cloud for Healthcare’s Virtual Clinic application allows clinicians to use video conferencing to provide high-quality, personalized, and affordable consultations. Using the entire meetings platform in Microsoft Teams, providers will be able to schedule, manage, and conduct virtual visits with patients. The Virtual Clinic application can then be embedded inside of Microsoft Teams to provide a practitioner with a full view of their patient’s information and history all in one unique experience.

Industry Prioritized Scenarios

Virtual Care focuses on the **Enhance patient engagement** priority scenario by providing a virtual health solution for scheduling and following up on virtual visits between patients, providers, and care managers.



Healthcare Story

This lab will focus on the healthcare story of Reed Flores.

Timeline

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After coming home from hiking, Reed noticed he had a new rash on his right leg. He decides to schedule a virtual appointment to get a diagnosis.

In this lab, you will first play the role of a Lamna Healthcare system administrator by configuring the Microsoft Cloud for Healthcare Virtual Clinic application to be used for virtual appointments. Then, you will play the role of Reed Flores by scheduling a virtual appointment with his practitioner, Alex Johnson. Finally, you will join the virtual appointment from the view of a practitioner to observe the complete end-to-end experience.

Exercise 1: Configure Virtual Clinic Application

In this exercise, you will configure the Microsoft Cloud for Healthcare Virtual Clinic application. The Virtual Clinic application allows practitioners to use video conferencing in Microsoft Teams to provide high-quality, personalized, and affordable consultations for their patients.

Task 1: Create a new Practitioner Specialty for the Patient Portal

In this task, we are going to create a new **Practitioner Specialty** for the Patient Portal. Practitioner Specialties are used to define the **reason** why a patient is booking the virtual appointment. They are defined as Codeable Concepts records, with the type of Practitioner Specialty.

Below is an example of the appointment booking screen in the Patient Portal. As the first step in the process, the user must select a reason for their appointment.

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1. Go to <https://make.powerapps.com/>.
2. In the upper right-hand corner, click the **funnel** **icon** which will open **Advanced Find**.

Icon

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1. In the **Search** box, browse for **Codeable Concepts** and click **Results**.

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1. Click **New Codeable Concept**.

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1. In the new Codable Concept record, fill in the following details and click **Save**.
   1. **Name**: General Medicine
   2. **Text**: General Medicine
   3. **Type**: Practitioner Specialty
   4. **Code**: general

Graphical user interface, application

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**Congratulations!** You have created a new Practitioner Specialty that will now be available for selection as an appointment visit in the Patient Portal.

Task 2: Configure Mapped System User on Practitioner Record

In this task, you will configure the Mapped System User field on the Practitioner record. This field should be set to the system user that maps to the contact record. In our case here, we will set it to the record associated with our logged in user. This will allow our user to act as the practitioner in the virtual visit.

There are two different places the Teams meeting may be created:

* In the case of virtual appointments, the Teams meeting is created on the mapped user’s calendar.
* In the case of instant virtual appointments, the Teams meeting is created on the Organizer (organizer email for virtual appointments) specified in the Admin settings.

1. In Power Apps, select **Apps** and then open the **Virtual Clinic** application.

Graphical user interface

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1. Click **People**, change the view to **Active Practitioners**, and open the **Alex Johnson** record.

Graphical user interface, application

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1. Select **your logged in user** as the **Mapped System User**.

Graphical user interface, application

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1. Click **Save & Close**.

**Congratulations!** You have mapped the practitioner record to your logged in user.

Task 3: Enable a Practitioner’s Schedule

In this task, you will configure the practitioner’s schedule to allow patients to book appointments with them using the Patient Portal. This will allow Reed to schedule an appointment with his practitioner, Alex Johnson.

1. In the Virtual Clinic app, change the sitemap area in the lower left corner from Operations to **Schedule Administration**.

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1. On the sitemap, select **Schedules** and open the **Alex Johnson schedule** record.

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1. Change **Active** from No to **Yes** and click **Save**.

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**Congratulations!** You have enabled a practitioner’s schedule to be used for booking virtual appointments.

Task 4: Configure Slots

In this task, we will configure a new appointment slot to show practitioner’s availability. This will allow patients to select an available appointment time slot when booking with a practitioner. In this case, we will enable the practitioner, Alex Johnson, to be available today at a set time for virtual appointments.

1. In the Virtual Clinic app, select **Slots** on the Site Map and click + **New**.

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1. Fill in the following record details and click **Save & Close**.
   1. **Name**: Alex Johnson Slot
   2. **Start**: Today, at a later time
   3. **End**: Today, an hour after the Start
   4. **Schedule**: Alex Johnson schedule
   5. **Status**: Free
   6. **isVirtual**: Yes
   7. **Specialty**: General Medicine (the practitioner specialty record you created)
   8. **Service** **Category**: General Medicine (same as specialty)

A screenshot of a computer

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**Congratulations!** You have created a new virtual slot for Reed to book with his practitioner, Alex Johnson.

Task 5: Configure Environment Variables

In this task, you will configure the environment variables necessary to generate a Microsoft Teams URL for virtual appointments.

1. Go to <https://make.powerapps.com/>
2. Go to **Apps** and click on **See environment variables**.

Graphical user interface

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1. Scroll down to the bottom to find the **Virtual Visit Secret** and the **Virtual Visit Client ID**. These environment variables are used to authenticate against the Microsoft Graph API to schedule the meeting event. To set these up, we need to create a new Application Registration in Microsoft Azure.

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1. **Copy and paste** the following variables:
   1. **Virtual Visit Secret**: aJm7Q~y\_bSlwV0z~pQ0NZ3-zIlmhNKJbPzPfa
   2. **Virtual Visit Client ID**: dfda9044-cb98-4b0f-8086-cd651dbe4af4

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1. Finally, enter the email address of your logged in user into the Virtual Appointment Scheduler Email field (*ex: iaduser77@powerplatformopenhacks.onmicrosoft.com*).

Graphical user interface, text, application, email

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1. Click **Save and close**.

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**Congratulations!** You have obtained the **Virtual Visit Client ID** and **Virtual Visit Secret** combination to be used to authenticate against the Microsoft Graph API to schedule virtual meeting events. You have also entered the email address of a primary event scheduler.

Task 6: Activate Flows and Connection References

In this task, we will activate the Flows and Connection References that deployed along with the Virtual Clinic application.

1. Navigate to <https://make.powerapps.com/>.
2. Click **Solutions** and then click **+ New Solution**.

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1. Name the solution “LamnaHealthcare”, choose the **Default Publisher** and click **Create**.

Graphical user interface, text, application, email

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1. Select the new **LamnaHealthcare** solution and click **Edit**.

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1. Click **+ Add existing** and select **Cloud flow** under Automation**.**

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1. Select **CF -> Schedule Teams Meeting for instant and virtual, update record with url and status to booked** and click **Add**.

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1. **Select** the Cloud flow. Navigate to **Details in a new tab** on the command bar to open Power Automate.

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1. Under the **Connection References** section, click **Edit**

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Description automatically generated

1. Click **Edit**.

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1. Click **Sign in** for **Microsoft Dataverse** to create the Connection Reference.

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1. Click **Sign in** for **Office 365 Users** to create the Connection Reference.

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1. Click **Continue**

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1. Click **Save** to commit your updates.

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1. Click the **Back** **arrow** to return to the flow’s main page. Ensure it has completed saving first.

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1. Click **Turn on** to turn on the flow.

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**Congratulations!** You have set the Connection References and turn on the Cloud flow for creating virtual appointments.

Exercise 2: Configure Microsoft Teams for Virtual Visits

In this exercise, you will configure integration with Microsoft Teams for Lamna Healthcare Company. Microsoft Teams offers several features useful for hospitals and other healthcare organizations. By integrating Microsoft Cloud for Healthcare with Microsoft Teams, you can improve the collaboration between your care team staff and enhance patient care. You can quickly schedule and conduct virtual visits remotely with patients.

Additionally, your care team can use Microsoft Teams internally to do the following:

* Chat, call, post messages, and communicate as a team.
* Store and share files and documents to collaborate.
* Use Shifts to create, manage, and share schedules among your staff.

Task 1: Install and Set up Microsoft Teams Integration

By default, the Basic and Enhanced Microsoft Teams integration is disabled for customer engagement apps in Dynamics 365. In this Task, we will enable Microsoft Teams in Dynamics 365.

1. Go to <https://make.powerapps.com/>.
2. Select the **gear** in the upper right-hand corner and then select **Advanced Settings.**

Graphical user interface, application

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1. You will be landed in Dynamics 365 Business Management section.

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Description automatically generated

1. Go to **Settings** 🡪 **System** 🡪 **Administration.**

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1. Select **System Settings.**

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1. Under **Microsoft Teams Integration**, switch Enable **Basic** Microsoft Teams Integration to **Yes**.

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1. When the pop-up opens to verify the change, click **OK**. This will take several minutes to configure. Graphical user interface, application

   Description automatically generated
2. When it is completed, click **Finish**.

Graphical user interface

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1. Once back on System Settings, switch Enable **Enhanced** Microsoft Teams integration to **Yes**.

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1. When the pop-up opens to verify the change, click **OK**.

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1. Another pop-up window will open to grant permissions. Select the user you are signed in as currently.

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1. Click **Accept** for requested permissions. It may take several minutes to configure. Ensure you do not have pop ups blocked that may interfere with the communication. If so, turn off blockers for this website, cancel and try connecting again.

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1. Click **Finish**.

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1. You will now see that both Microsoft Teams Integration settings are set to Yes. Click **OK**.

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**Congratulations!** You have enabled Microsoft Teams integration for Dynamics 365.

Task 2: Embed Virtual Clinic App in Microsoft Teams

In this task, you will customize the Microsoft Teams experience for a practitioner by embedding the Virtual Clinic app to the Teams channel in your environment. We will be utilizing the Microsoft Teams web experience for this task.

1. While logged in to your Microsoft 365 tenant, open a new tab and go to [teams.microsoft.com](https://teams.microsoft.com).
2. Click **Next** through the prompts, and then click **Let’s Go.**

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1. Select Teams on the left navigation bar and then click **Create Team.**

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1. Select **From scratch.**

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1. Select **Public**.

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1. Name the Team “**Lamna Healthcare – Redmond**” and click **Create**. You may skip add members step.

Graphical user interface, application, Teams

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1. Once the Team is created and the **General channel** selected, click the **+** button to add a tab

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1. Search for “Power Apps” and select **Power Apps**

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1. Click **Add**

Graphical user interface, application, Teams

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1. Select **Model-driven apps** form the dropdown menu, then scroll down and select **Virtual Clinic** and click **Save**. Ensure to select the app that is associated with your environment.

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1. You will now see the Virtual Clinic app embedded in Microsoft Teams

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**Congratulations!** You have embedded the Virtual Clinic app in Microsoft Teams.

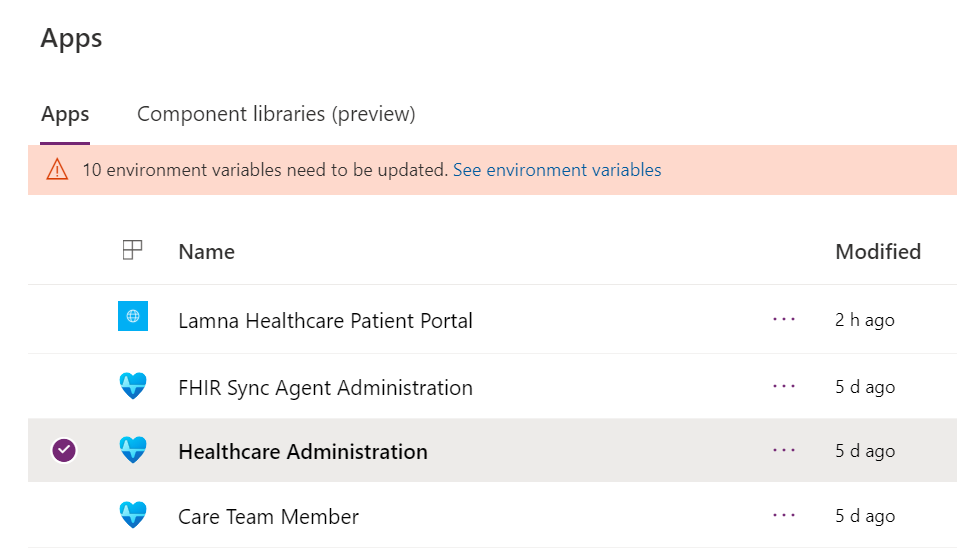
Exercise 3: Schedule a Virtual Visit

In this final exercise, you will use the items that you configured in the previous exercises to schedule a virtual visit between Reed Flores and his practitioner, Alex Johnson.

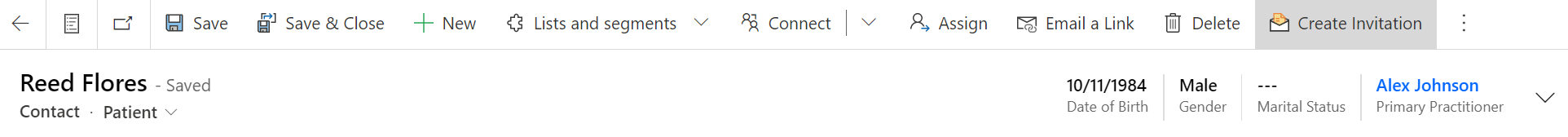
**Task 1: Schedule an Instant Virtual Appointment**

In this task, you will log in to the Patient Portal as Reed Flores and schedule an instant virtual appointment.

1. Go to <https://make.powerapps.com/>
2. First, we must create an account in the patient portal for Reed Flores like we did for Casey Jensen in Lab 05: Patient Access & Service Center. Go to Apps and open Healthcare Administration.



1. Open Reed Flores’ record and select **Create Invitation** on the command bar.



1. Click **Save** and navigate to the **Advanced** tab for the invitation code. Store the invitation code.

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1. Navigate back to Power Apps and open the **Lamna Healthcare Patient Portal.**

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1. Select **Sign in**.

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1. Select the **Redeem Invitation** tab, enter the **Invitation code**, and click **Register**.

Graphical user interface, text, application

Description automatically generated

1. Create an account for **Reed Flores**. Click Register.

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Description automatically generated

1. If you are landed on the profile page, select the Lamna Healthcare name or logo in the top left to go to the homepage.

Graphical user interface, application

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1. Expand **Appointments** and select **Schedule new**.

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1. Select **Instant virtual appointment**.

Graphical user interface, text, application, email

Description automatically generated

1. Select the **General Medicine** option that you created earlier in the lab as the reason for the visit.

Graphical user interface

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1. On the Personal tab, Reed Flores’ personal information should auto-populate. Scroll down and click **Next** to go to the next section.



1. On the insurance section, click **+ Add Insurance.**

Graphical user interface

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1. Fill out the required fields with any information and click **Next.**

Graphical user interface, text, application, email

Description automatically generated

1. Click **Next.**

Graphical user interface, text, application, email

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1. **Check the box** for Consent Terms and then click **Join queue**.

Graphical user interface

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1. A new internet browser tab will open and may be blank. Let’s join as the practitioner first and then rejoin as the patient.
2. Open a new tab in your browser and go to [teams.microsoft.com](https://teams.microsoft.com). Navigate to the Virtual Clinic app that you embedded in the “Lamna Healthcare – Redmond” Teams channel. On the Instant Virtual Appointment Dashboard, you will see that **Reed Flores** has arrived for a virtual appointment. **Double-click to open the record**.

Graphical user interface, text, application, email

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1. When Reed Flores’ patient record opens, click **Join Meeting**

Graphical user interface

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1. Click **Cancel** as we will not open the Microsoft Teams desktop app in this example.

Graphical user interface, text, application

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1. Click **Continue on this browser** to proceed with opening the virtual meeting.

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1. Click **Join now** to join the virtual meeting.

Graphical user interface, application, Teams

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1. Click **Teams** on the right to reduce the size of the meeting and see the full holistic experience for a practitioner.

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1. Go back to the Lamna Healthcare Patient Portal tab and **click the link** provided to join the appointment as the patient in the portal.

Graphical user interface, website

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**Congratulations!** You have scheduled an instant virtual appointment using the patient portal and joined the appointment as a practitioner using the Virtual Clinic app embedded in Microsoft Teams.

Summary

**Nice work!**  You have completed **Lab 06 – Virtual Visits**.

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

* Configure the Virtual Clinic app
* Configure Microsoft Teams for virtual visits
* Schedule a virtual visit in the Patient Portal

Completing this lab concludes the Microsoft Cloud for Healthcare in a Day training. Thank you!