



# Microsoft Cloud for Healthcare Industry Labs

## Lab 05: Patient Access & Service Center

Step-by-Step Lab

September 2021

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# Overview

## Learning Objectives

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

- Configure and navigate the Patient Access Portal with the Healthcare template
- Configure Agent Scripts to show in the Productivity Pane
- Configure Knowledge Articles to show in the Productivity Pane
- Experience full escalation scenario between Patient, Health Bot, and Live Agent

## Prerequisites

- Lab 01 – Care Management
- Lab 04 – Azure Health Bot

## Patient Access Portal

Provide patients with access to their health data, knowledge articles, and in-person and virtual appointment scheduling. Enable patients to chat with a health bot, communicate with a caregiver, and view their clinical data, all within the portal provided by Patient Access.

Key capabilities for Patient Access include the following:

- **Provide access:** Give patients an easy-to-use portal to access their health information.
- **Direct engagement:** Enable patients to engage through automated chat conversations that hand off to your patient service center.
- **Scheduling and messaging:** Let your patients schedule appointments and send messages to their providers.

## Patient Service Center Application

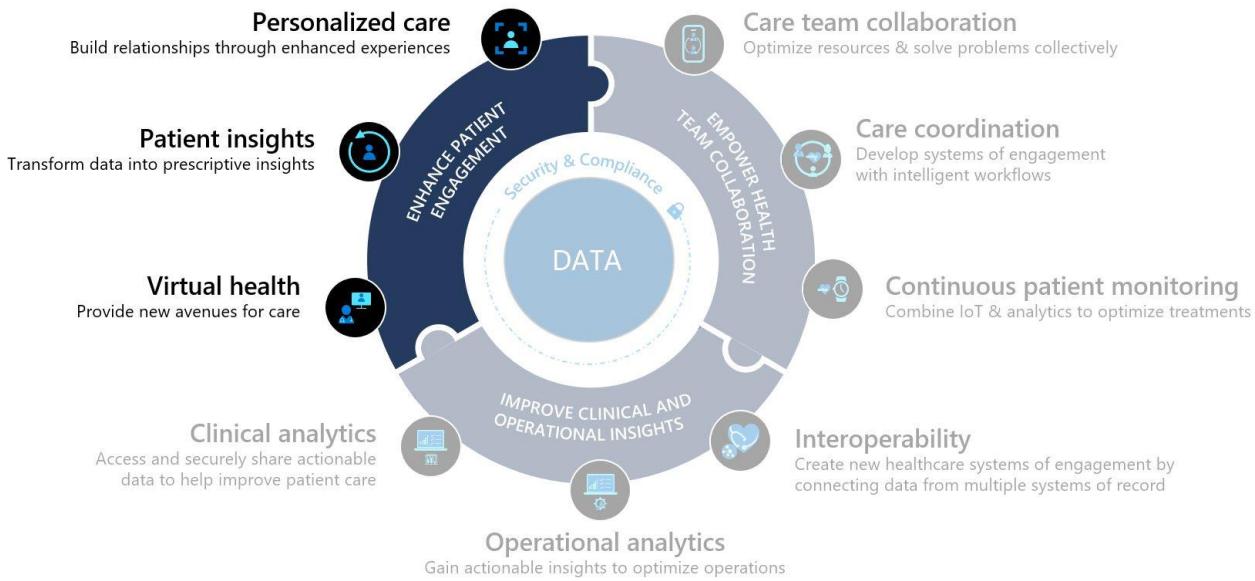
Engage with your patients in the way they want, by using chat, and monitor automatic conversations through the Microsoft Azure Health Bot service. Service agents can help your patients with information and setting up appointments.

Key capabilities for Patient Service Center include the following:

- **Monitor patient conversations:** An ongoing conversations dashboard provides information on the conversations that are handled by the agents and integrated bots.
- **Agent scripts:** Leverage provider-specific agent scripts to address patient issues.
- **Monitor effectiveness:** Conversation intelligence provides insights to service center managers on agent performance.
- **Follow up:** Send follow-up surveys on patient satisfaction, reminders on appointments, and more.
- **Appointment scheduling:** Schedule or reschedule appointments during conversations with patients.

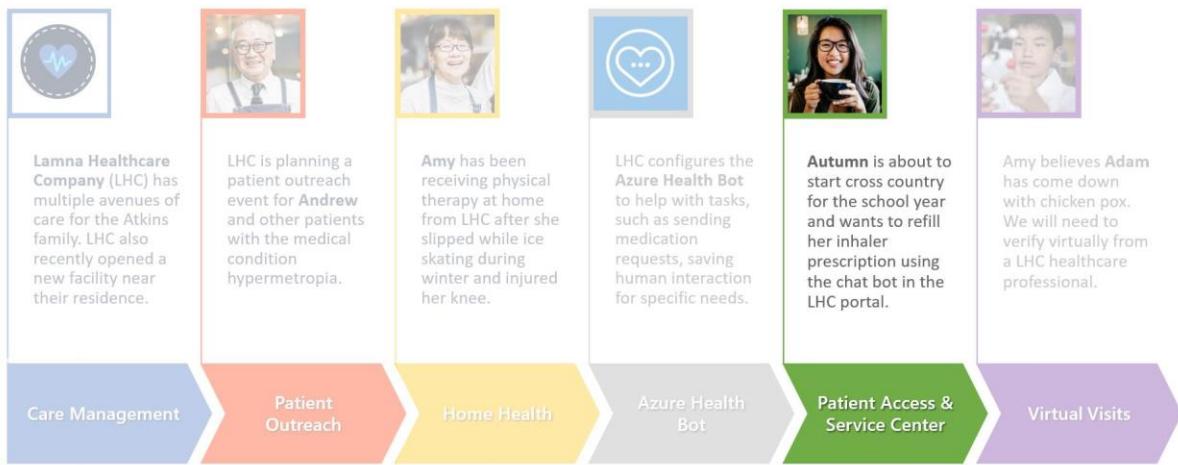
## Industry Prioritized Scenarios

The Patient Access Portal and Patient Service Center focus on the **Enhance patient engagement** priority scenario by engaging effectively with patients using pre-built guidance and automated systems.



## Atkins Family Healthcare Story

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



Autumn is looking forward to running on the cross-country team when school starts back up in the fall. She's realized her current albuterol inhaler is low on medication and decides it's a good time to get a fresh refill. Since she prefers text, she wants to request through the chat bot in the Patient Access Portal.

In this lab, you will first play the role of a Lamna Healthcare system administrator to configure the Patient Access Portal and various tools in Patient Service Center. You will also play the role of Autumn, who will log into the portal and interact with the Azure Health Bot to refill her inhaler prescription. In the final scenario, you will play both roles to experience the full end-to-end escalation experience.

# Exercise 1: Configure & Navigate the Patient Access Portal

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

1. Configure an external website to the Healthcare Patient Portal template
2. Create a registration code and invite a patient to create an account for the website
3. Log in as a patient to navigate the features of the healthcare website

The **Healthcare Patient Portal** is a template installed in your environment by the Patient Access module in Microsoft Cloud Solution Center when Microsoft Cloud for Healthcare was deployed.

A **Portal** is an external website that allows for communication between a company and its users. In this case, the Lamna Healthcare Company wants an external website for their patients to access their medical history and communicate effectively with the institution. The Healthcare Patient Portal template tailors the website's user interface for a healthcare company focusing on secure communication, information access, and an overall improved patient experience.

Here's what you should see after configuring and logging into the Healthcare Patient Portal:

The screenshot shows the Contoso Healthcare Patient Access Portal. At the top, there is a navigation bar with the Contoso Healthcare logo and a dropdown menu for 'Reed Flores'. On the left, a sidebar contains links for Home, Find a doctor, Messages (Inbox, Sent), Appointments (Upcoming, Schedule new), Medical records (Medications, Allergies, Conditions, Visit summaries, Care plans, Care team), and a 'Welcome Reed Flores' message. The main content area features three large cards: 'Schedule an appointment' (laptop screen showing a video call), 'View messages' (woman on phone), and 'Find a doctor' (doctor smiling). Below these are sections for 'Unread messages' (empty) and 'Medications' (empty). A 'Let's Chat!' button is located at the bottom right.

If you'd like to learn more about portals, check out Microsoft Docs: [What is Power Apps portals?](#)

## Task 1: Configure the Healthcare Patient Portal

Prior to deploying Microsoft Cloud for Healthcare, we created a portal in your environment using the **Customer Self-Service** template. This was a prerequisite to install the Healthcare Patient Portal as part of the Patient Access module.

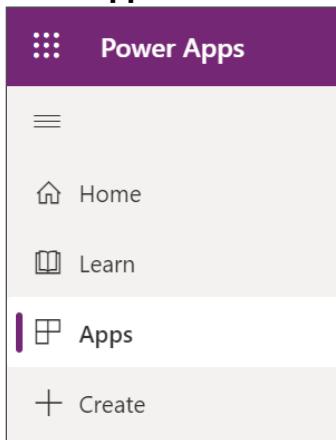
Lamna Healthcare wants to associate the previously installed Customer Self-Service portal with the **Healthcare Patient Portal** template, so the correct website is displayed to the user. The following steps will guide you through how to bind your website to the proper template and restart the portal for changes to apply.

We will first open the Portal to show the Customer Self-Service template currently bound. After the configuration steps in this task, you will see the new Healthcare Patient Portal user interface.

1. Using an In-Private or Incognito window, navigate to [Power Apps](#).
2. Select the correct environment from the upper right **Environment** drop down.



3. Select **Apps** on the left navigation bar.



4. Find the **Lamna Healthcare Patient Portal** app. It should be the only app where Type is Portal. You can also search for it in the Search bar in the upper right corner

A screenshot of the Power Apps interface. The top navigation bar has "Power Apps" and a search bar. The left sidebar shows "Home", "Learn", "Apps" (selected), "Create", "Dataverse", "Flows", and "Chatbots". The main area is titled "Apps" and shows a table with two rows. The columns are "Name" and "Modified". The first row is for "Lamna Healthcare Patient Portal" (modified 3 wk ago) and the second row is for "Healthcare Administration" (modified 3 wk ago). A red banner at the bottom of the table says "⚠️ 4 environment variables need to be updated. See environment variables".

Name	Modified
Lamna Healthcare Patient Portal	3 wk ago
Healthcare Administration	3 wk ago

5. Click the app name to **open** the **Lamna Healthcare Patient Portal**. You may also select More Commands (...) > Browse or click Browse on the top command bar to open it.

The screenshot shows the Microsoft App Management portal interface. At the top, there's a header with the word "Apps". Below it, a navigation bar has "Apps" selected, with the sub-label "Component libraries (preview)". A prominent orange warning banner at the top states "⚠️ 4 environment variables need to be updated. See environment variables". The main content area is a table with columns "Name" and "Modified". The "Name" column lists several items: "Lamna Healthcare Patient Portal" (selected, indicated by a checkmark), "Healthcare Administration", "FHIR Sync Agent Administration", "Patient Service Center", "Home Health", and "Care Team Member". To the right of the table, a context menu is open for the selected item, listing options: "Edit", "Browse" (which is highlighted in purple), "Share", "Settings", "Delete", and "Details".

6. You should see the Customer Self-Service template shown in the Lamna Healthcare Patient Portal.

The screenshot shows the Contoso Customer Self-Service website. The header includes the company name "Contoso, Ltd." and links for "Knowledge Base", "Forums", "My Support", and "Sign in". The main banner features the text "CONTOSO CUSTOMER SELF-SERVICE" over a background image of a factory floor. Below the banner is a search bar with "All" and "Search" buttons. A "Most Popular" section follows, containing three categories: "Most Popular Articles", "Most Recent Articles", and "Top Rated Articles". At the bottom of the page, the word "Forums" is visible.

7. Close the Lamna Healthcare Patient Portal website. Now you will configure it to the Healthcare Patient Portal template.

8. Return to the Power Apps screen in the Apps section. Select the **Lamna Healthcare Patient Portal** app if it isn't already selected.

The screenshot shows the Microsoft Power Apps portal interface. On the left, there's a navigation sidebar with options like Home, Learn, Apps (which is selected and highlighted in purple), Create, Dataverse, Flows, and Chatbots. The main area is titled 'Apps' and shows a list of apps. There are two items listed:

Name	Modified
Lamna Healthcare Patient Portal	3 wk ago
Healthcare Administration	3 wk ago

A red warning bar at the top indicates: "4 environment variables need to be updated. See environment variables".

9. Select **More Commands (...)** > **Settings**. This will bring out the **Portal settings** panel on the right.

The screenshot shows the settings page for the 'Lamna Healthcare Patient Portal'. On the left, there's a list of apps with their names and last modified dates. The 'Lamna Healthcare Patient Portal' app is selected. On the right, there's a vertical ribbon menu with several options: Edit, Browse, Share, Settings (which is selected and highlighted in grey), Delete, and Details. The 'Settings' option is currently active.

Name	Modified
Lamna Healthcare Patient Portal	3 wk ago
Healthcare Administration	
FHIR Sync Agent Administration	
Patient Service Center	
Home Health	
Care Team Member	

10. In **Portal settings**, under **Advanced options**, select **Administration**.

## Portal settings

Name \*

Lamna Healthcare Patient Portal

Address \*

https://cloudforhealthcare.powerappspportals....

Language

English

---

### Advanced options

[Authentication settings](#)  
Configure authentication settings and manage identity providers for your portal.  
[Authentication settings](#)

[Administration](#)  
See additional details and perform advanced portal actions e.g. Update website address or provide a custom domain name. [Learn more](#)  
[Administration](#) ↗

[Site settings](#)  
Configure website settings. [Learn more](#)  
[Site settings](#) ↗

11. Selecting Administration will open a new window, the **Power Apps Portals admin center**, where you can do portal administrative tasks.
12. You should be landed in the **Portal Details** tab of the Power Apps Portals admin center.

Power Apps portals admin center

Portal Details

- Portal Actions
- Manage Dynamics 365 Instance
- Set up SharePoint integration
- Set up Power BI integration
- Run Portal Checker
- Manage portal authentication key
- Set up IP address restriction

Portal Details

General Settings

Name \*

Lamna Healthcare Patient Portal

Type \*

Trial

Your trial portal will expire in 5 day(s). Convert your portal to production to avoid its suspension. [Learn more](#)

Convert

Application ID

2ff2f621-b4af-43a8-b9f9-9058b58d9c9e

Owner

Portal URL

Base Portal URL

<https://cloudforhealthcare.powerappspportals.com>

Portal Audience

Portal Audience \*

Customer

Update Portal Binding

Select Website Record \*

Customer Self-Service

13. Scroll down to **Update Portal Binding > Select Website Record**.

Update Portal Binding

Select Website Record \*

Customer Self-Service

14. Open the **Select Website Record** drop down and change the current value (Customer Self-Service) to **Healthcare Patient Portal**. This will bind the Healthcare Patient Portal template with this portal URL and show the proper user interface to the user.

**Update Portal Binding**

Select Website Record \*

Customer Self-Service

Healthcare Patient Portal

Customer Self-Service

15. Select **Update**.

**Update Portal Binding**

Select Website Record \*

Healthcare Patient Portal

**Change Portal State**

Portal State \*

On

Enable portal for early upgrade

If you are a Global Administrator, click [here](#) to provide consent to your Dynamics 365 portals.

**Update**

16. Select **Portal Actions** section on the left navigation. Then click **Restart**.

Power Apps portals admin center

Portal Details

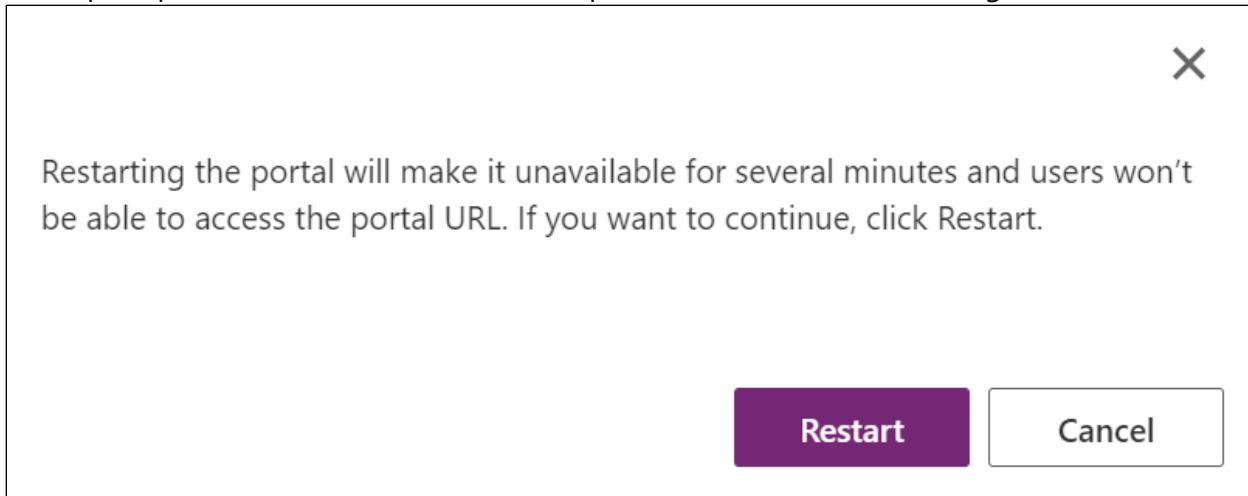
**Portal Actions**

- Manage Dynamics 365 Instance
- Set up SharePoint integration
- Set up Power BI integration
- Run Portal Checker
- Manage portal authentication key
- Set up IP address restriction

Your trial portal will expire in 5 day(s). Convert your portal to production to avoid its suspension. [Learn more](#) **Convert**

<b>Restart</b> Restart this portal.	<b>Update Dynamics 365 URL</b> Update your Dynamics 365 URL if it has changed after provisioning.	<b>Install Project Service Automation extension</b> Install the Project Service Automation extension for Partner portals
<b>Install Field Service extension</b> Install the Field Service extension for Partner portals	<b>Get Public Key</b> Click to get the public key of the Portal.	<b>Get latest metadata translations</b> Click to get latest metadata translations

17. When prompted, confirm the **Restart** for the portal. This will allow the change to take effect.



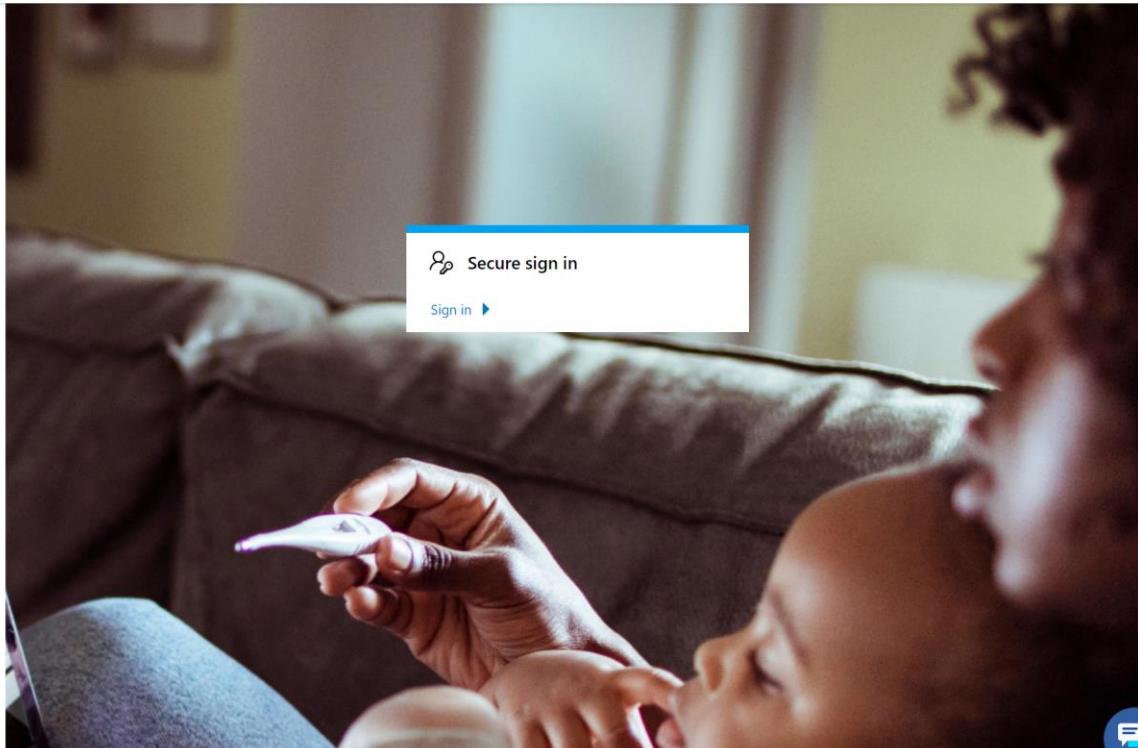
18. Wait 1-5 minutes for the portal to restart. (Feel free to refill water or stretch your legs!)
- You may also jump ahead to [Task 2](#), and skip opening the portal now as we will open the portal again later in the exercise.
19. Navigate back to the Lamna Healthcare Patient Portal in [Power Apps](#).

Name	Modified
Lamna Healthcare Patient Portal	3 wk ago
Healthcare Administration	3 wk ago

20. If you see the following error, the portal is still restarting.



21. Once the Portal is opened and running properly, it should look like the following:



**Congratulations!** You completed the post deployment steps to configure the Healthcare Patient Portal template deployed from Patient Access. After updating the bindings and restarting the portal, the website now shows as Healthcare Patient Portal template rather than Customer Self-Service.

## Task 2: Invite a Patient to the Portal

Now that the Patient Portal is ready to go, we need to allow Lamna Healthcare patients to create accounts.

In this task, you will learn how to **create an invitation code** for patients to sign up and use the Lamna Healthcare Patient Portal. Since **Autumn** will be accessing the patient portal to fill her medication in this lab, we will create an account for her. You also need to create an account for **Adam** to use in the Virtual Care lab.

1. Open the **Healthcare Administration** app in [Power Apps](#).

The screenshot shows the 'Apps' screen in Power Apps. At the top, there are two tabs: 'Apps' (which is selected) and 'Component libraries (preview)'. Below the tabs, a message says '⚠️ 10 environment variables need to be updated. See environment variables'. The main area is a table with columns 'Name' and 'Modified'. There are five items in the list:

Name	Modified
Lamna Healthcare Patient Portal	2 h ago
FHIR Sync Agent Administration	5 d ago
<b>Healthcare Administration</b>	5 d ago
Care Team Member	5 d ago

2. In the Administration section of the sitemap, select **People**, if not already selected. You will see the **Active Patients** grid view.

The screenshot shows the Dynamics 365 interface with the 'Healthcare Administration' app selected. On the left, there is a sitemap with sections: Home, Recent, Pinned, Administration, People (which is selected), Organizations, and Locations. The main area is titled 'Active Patients' and shows a grid of patient data. The grid has columns for Date of Birth, Full Name, and Gender. There are three rows of data:

Date of Birth	Full Name	Gender
7/7/2011	Adam Atkins	Male
11/15/1965	Amber Rodriqu...	Male
2/20/1970	Amy Atkins	Female

3. Open the **Autumn Atkins** patient record so we can obtain an invitation code for her to use.

Active Patients ▾			
Group By: (no grouping) ▾			
✓ Date of Birth ▾	Full Name ↑ ▾	Gender ▾	Deprecated – Medical Record ... ▾
7/7/2011	Adam Atkins	Male	MRN7835-4571
11/15/1965	Amber Rodriguez	Male	MRN2631-2120
2/20/1970	Amy Atkins	Female	MRN7835-4569
3/15/1965	Andrew Atkins	Male	MRN7835-4568
✓ 10/10/2005	Autumn Atkins	Female	MRN7835-4570
8/18/2004	Casey Jensen	Female	MRN1156-6243

4. On Autumn Atkins patient record, select **Create Invitation** from the top command bar. It should be near the right side. You may have to expand additional options to see this command in the drop down.

The screenshot shows the Microsoft Health Records interface for a patient named Autumn Atkins. The top navigation bar includes standard options like Save, New, and Connect. To the right of the patient's name, there are fields for Date of Birth (10/10/2005), Business Phone, and Email. A dropdown menu is open, showing several options: Create Invitation (which is highlighted in grey), Change Password, and Refresh. Below the top bar, the patient's contact information is displayed, including their name, date of birth, and phone number.

If you don't see the command, ensure you are seeing the **patient form**, not the contact form.

The screenshot shows the patient form for Autumn Atkins. The top navigation bar has tabs for Summary, Clinical, Care Team, Care Plan, and Related. The 'Summary' tab is currently selected. Below the tabs, there is a navigation menu with items: Contact, Patient (which is highlighted in grey), Practitioner, and Information. The main content area is labeled 'Patient Information'.

5. A New Invitation form will appear. You don't need to make any changes. Click **Save**. Once saved, an invitation code will be created for the patient. Let's go retrieve it.

The screenshot shows the 'New Invitation' form. The 'General' tab is selected. The form contains the following fields:

- Name: \* Autumn Atkins
- Type: \* Single
- Owner/Sender: \* Allen Contoso
- Invited Patient: Autumn Atkins

6. Go to the **Advanced** tab on the Invitation record. Copy and store the **Invitation Code** for accessing the Patient Portal in the next task.

The screenshot shows a software interface for managing patient invitations. At the top, it displays the name "Autumn Atkins" and the word "Invitation". Below this, there is a navigation bar with four tabs: "General", "Advanced" (which is underlined, indicating it is the active tab), "Activities & Notes", and "Related". Under the "Advanced" tab, there is a section labeled "Invitation Code" which contains the value "Jary82dHuH5hd3AhjpQKkaXxZRJIW894Q8Crei1-DCOTIKhgl-R...".

**Congratulations!** You have successfully created an invitation code for **Autumn** to register an account in the Patient Portal. Repeat this task for **Adam** to create another invitation code. Remember to keep the right names associated with each code!

### Task 3: Redeem Invitation Code and Sign into Patient Portal

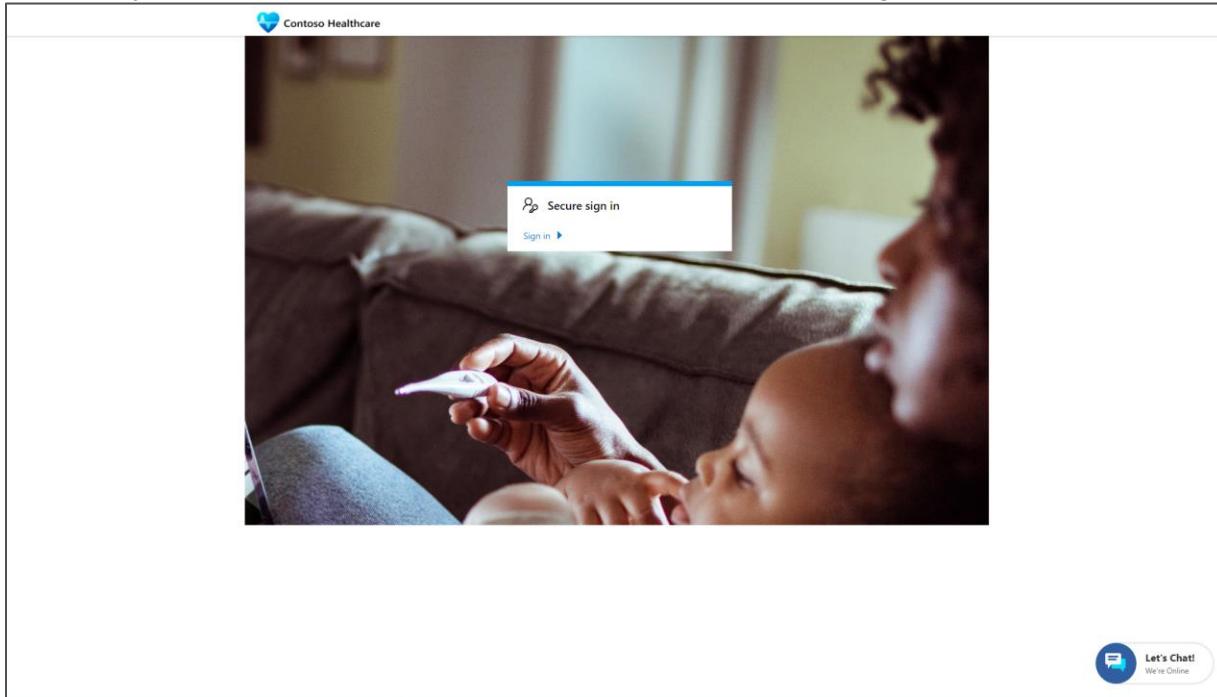
In this task, you will **transition personas** and act as **Autumn** and **Adam Atkins**, who just received invitation codes to Lamna Healthcare's Patient Portal and are excited to register and navigate its features.

1. Open the Lamna Healthcare Patient Portal in [Power Apps](#).

The screenshot shows the Microsoft Power Apps portal interface. On the left, there is a navigation sidebar with options like Home, Learn, Apps (which is selected and highlighted in purple), Create, Dataverse, Flows, and Chatbots. The main area is titled "Apps" and shows a list of apps. One app is highlighted: "Lamna Healthcare Patient Portal". A message above the list states: "⚠️ 4 environment variables need to be updated. See environment variables". The list includes the following items:

Name	Modified
Lamna Healthcare Patient Portal	3 wk ago
Healthcare Administration	3 wk ago

2. In the first task, we configured the portal to the Healthcare Patient Portal template. Now that it's been restarted, your Patient Portal should open and look like the following:



3. If you still see the Customer Self-Service template, make sure you've completed Exercise 1, Task 1 to change the template to the Healthcare Patient Portal.

4. In the Patient Portal, select **Sign in**.

The screenshot shows a light gray rectangular box containing a 'Secure sign in' button with a key icon and a 'Sign in' link below it.

5. After the sign in page loads, select the **Redeem invitation** tab.

The screenshot shows the Contoso Healthcare Patient Portal sign-in page. The 'Redeem invitation' tab is highlighted in blue. The page includes fields for 'Username' and 'Password', a 'Remember me?' checkbox, and 'Sign in' and 'Forgot your password?' buttons.

6. Paste the **Invitation code** you stored for Autumn Atkins. Click **Register**.

The screenshot shows the Contoso Healthcare Patient Portal sign-up page. The 'Redeem invitation' tab is highlighted in blue. It features an 'Invitation code' input field containing the value 'Jary82dHuH5hd3AhjpQKkaXxZRJIW894Q8Crei1-DCOTIKhgl-RECcR-AzXW0jg4ipYoEyz6TQKbuYHgfW7v-gSfcgZsEsO5xB8DrufR5LKqhnHHC1eeg5-zVxt'. There is also a 'I have an existing account' checkbox and a 'Register' button.

7. Register a new local account for Autumn Atkins with the following recommended details:

- Email:** Autumn.Atkins@contoso.com (should auto-fill)
- Username:** AutumnAtkins
- Password:** Make up your own. Please note the password to use for sign in later.

The screenshot shows the Contoso Healthcare Patient Portal register page for a new local account. It includes fields for 'Email' (Autumn.Atkins@contoso.com), 'Username' (AutumnAtkins), 'Password', and 'Confirm password'. A 'Register' button is at the bottom. Above the form, a message bar displays a long invitation code: 'Redeeming code: Jary82dHuH5hd3AhjpQKkaXxZRJIW894Q8Crei1-DCOTIKhgl-RECcR-AzXW0jg4ipYoEyz6TQKbuYHgfW7v-gSfcgZsEsO5xB8DrufR5LKqhnHHC1eeg5-zVxt zVx0NRlopaqRsqqFH-piJocNIKxP6WQ-hJuY3uH41c8tWBblGBai0-'.

8. Click **Register**. After selecting Register, you should be signed into the Patient Portal.

**Congratulations!** You have successfully redeemed an invitation to register an account for Autumn and signed in. Repeat this task with Adam's invitation code and his user information to create another account for Adam.

## Task 4: Navigate the Patient Access Portal

In this task, you will continue as **Autumn or Adam Atkins** and navigate the features of the Patient Portal.

- After registering for an account in the **Patient Access Portal**, you should be welcomed by the portal Homepage or profile page if your account requires action, such as email confirmation required. You can ignore the email confirmation warning if displayed.

Contoso Healthcare

Autumn Atkins

Your email requires confirmation.

Profile

Security

Change Password

Change Email

Manage External Authentication

First Name \*

Autumn

Last Name \*

Atkins

Home Phone 2

Provide a telephone number

Home Phone

425-555-0199

E-mail

Autumn.Atkins@contoso.com

How may we contact you? Select all that apply.

Email

Fax

Phone

Mail

Update

- Select **Contoso Healthcare** in the upper left to go back to the Homepage.

Contoso Healthcare

Autumn Atkins

Profile

- You should be navigated to the Patient Portal **Homepage**.



[Home](#)  
[Find a doctor](#)

Messages  
Appointments  
Medical records  
Personal information

## Welcome Autumn Atkins



### Unread messages

From	Subject	Received
------	---------	----------

There are no records to display.

### Medications

Medication	Ordered by	Date started	Refills
------------	------------	--------------	---------

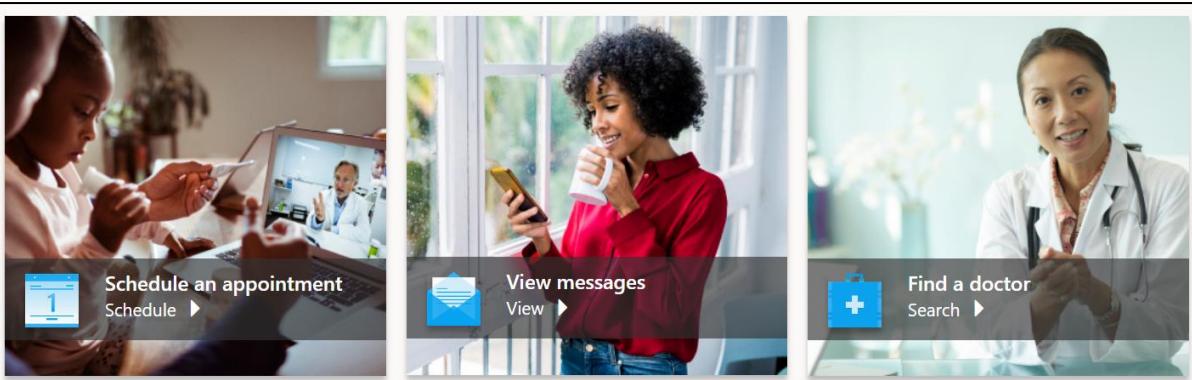
Asthma Inhaler Jamie Evans 5/3/2021 12:00 AM 3

### Upcoming appointments

Date ↑	Provider	Location
--------	----------	----------

There are no records to display.

4. In the center of the homepage, you will see **shortcuts** to schedule an appointment, view messages, or find a doctor.



5. Below the shortcuts, you will see **current patient information** including unread messages, upcoming appointments, and current medications.

### Unread messages

From	Subject	Received
------	---------	----------

There are no records to display.

### Medications

Medication	Ordered by	Date started	Refills
------------	------------	--------------	---------

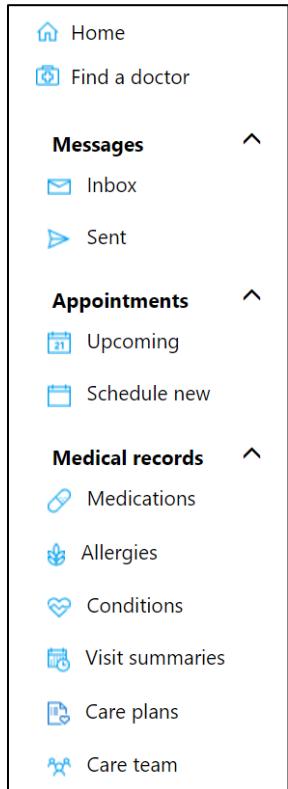
Asthma Inhaler Jamie Evans 5/3/2021 12:00 AM 3

### Upcoming appointments

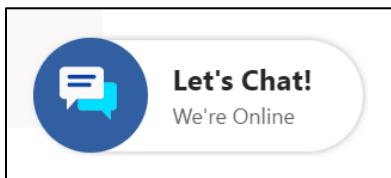
Date ↑	Provider	Location
--------	----------	----------

There are no records to display.

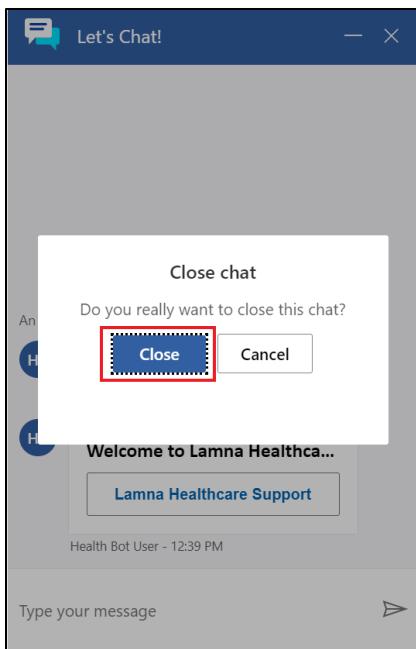
6. In the left navigation bar, you will see all available options for navigation in the Patient Portal. Click through the options to see what's available.
  - a. **Home** command will direct you back to the homepage.
  - b. **Find a doctor** shows a list of practitioners with associated city and state information.
  - c. **Messages** allows a secure method to send and receive messages to healthcare professionals.
  - d. Expand Messages on the navigation bar to see both the **Inbox** and **Sent** messages.
  - e. Expand **Appointments** to check **upcoming** and **schedule new** appointments. Scheduling new appointments allows for **clinic** or **virtual** appointments, which can be instantly instantiated. The Virtual Care Lab will go through the process of booking an instant virtual appointment.
  - f. Check **Medical records** including **medications**, **allergies**, **conditions**, **visit summaries**, **care plans**, and **care team**.



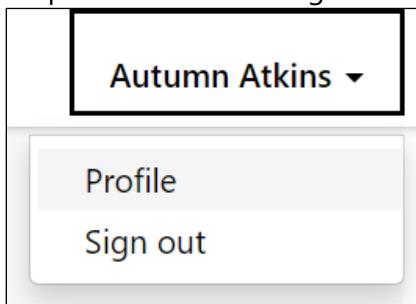
7. The Azure Health Bot icon shows at the lower right-hand corner of the screen. You may start a conversation by clicking **Let's Chat** button to open the virtual assistant.



8. In the final exercise, we will have a full conversation with the bot, but for now we will close and continue.



9. You may access the patient Profile page at any time by selecting the patient's name in the upper right drop down and selecting **Profile**.



10. Here you can customize the patient profile as needed. For now, we will keep it the same.

The screenshot shows the "Contoso Healthcare" patient profile page for "Autumn Atkins".

**Left Sidebar:**

- Profile (selected)
- Security
- Change Password
- Change Email
- Manage External Authentication

**Top Right:**

- Autumn Atkins (dropdown)
- Confirm Email (button)

**Main Content Area:**

**Your Information:**

First Name *	Autumn	Last Name *	Atkins
Home Phone 2	Provide a telephone number	E-mail	Autumn.Atkins@contoso.com
Home Phone	425-555-0199		

**Contact Preferences:**

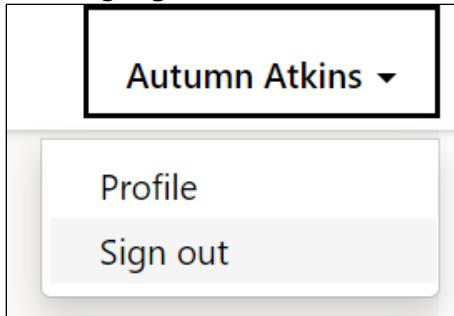
How may we contact you? Select all that apply.

Email  
 Fax  
 Phone  
 Mail

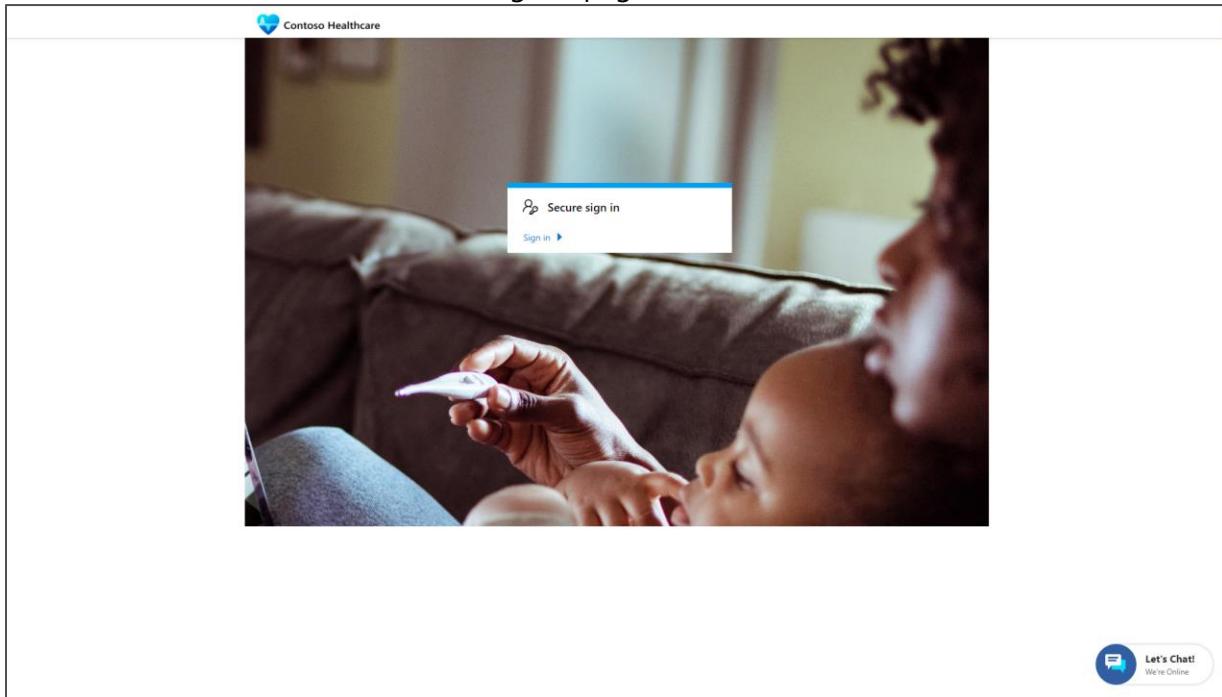
**Bottom:**

**Update** button

11. You may log out of the Patient Portal by selecting the patient's name in the upper right drop down and selecting **Sign Out**.



12. You should be redirected back to the sign in page.



**Congratulations!** You have navigated the Patient Portal to see what information and communication is available to the Patient.

In this exercise, you learned how to configure the Patient Access Portal to display as the Healthcare Patient Portal, invite patients to register to the website, and navigate the website features.

## Exercise 2: Configure Agent Scripts

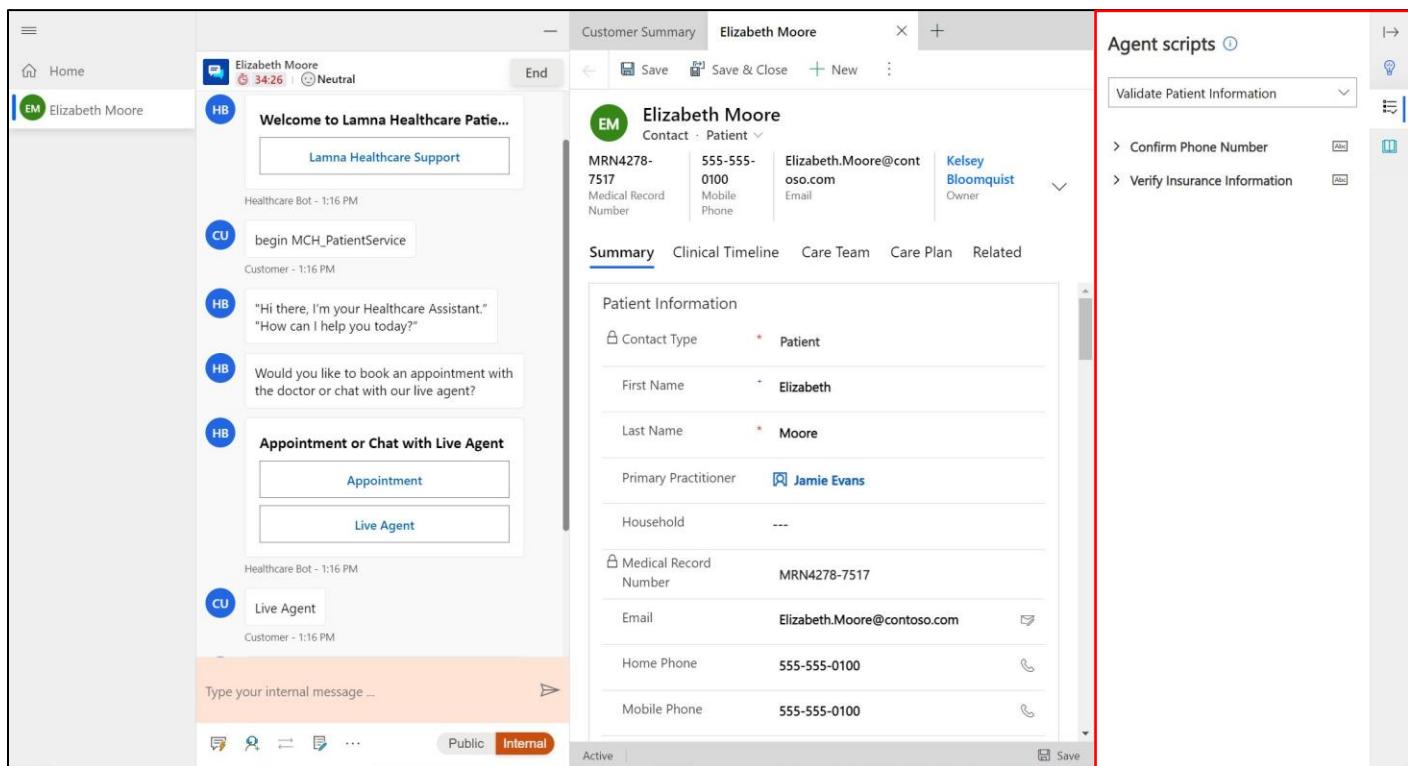
Lamna Healthcare Company wants to ensure they have proper tools in place to provide the best service and guidance during patient interactions.

Patient Service Center has a **productivity pane** which is an auxiliary work area which contains tools that support or expedite an agent's tasks when engaging with patients. During a patient engagement, it will be embedded directly on the screen next to patient information and can be collapsed or expanded as needed.

See the following documentation to learn more about the productivity pane: [Productivity pane overview](#)

**Agent Scripts** are one of the tools in the productivity pane that agents can use to help with patient care. Agent Scripts provide guidance for a specific situation and help organizations be unified, accurate, and effective while also being faster and more efficient with patients. The scripts ensure that only accurate, company-endorsed information is being shared and help reduce error and improve customer satisfaction.

In this exercise, you will create an agent script to appear in the productivity pane in Patient Service Center. The following screen shows the productivity pane on the right-hand side with the Agent Scripts tab showing. The agent script selected is Validate Patient Information and there are two steps shown. You will not see this below output until the final exercise in this lab while testing escalation, however, you will be creating the components needed to display in the productivity pane later.



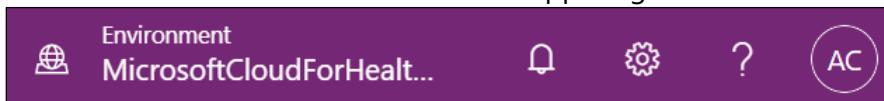
## Task 1: Assign Productivity Tools Administrator Role

In this task, you will assign the necessary roles to your user to create and use agent scripts. Specifically, you will be adding the **Productivity tools administrator** and **Productivity tools user** roles. The Productivity tools administrator can do any action (create/read/write/append/delete) on the agent script, while the Productivity tools user only has read capabilities. Since we are creating them, we need the administrator role.

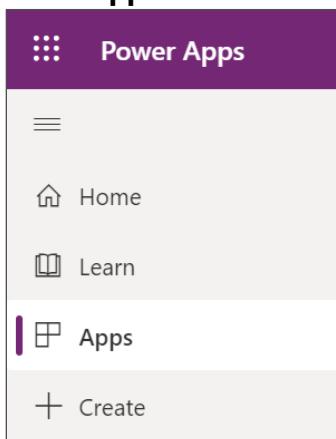
See the following documentation to learn more about these roles: [Assign roles and enable users for Omnichannel for Customer Service](#)

22. Using an In-Private or Incognito window, navigate to [Power Apps](#).

23. Select the correct environment from the upper right **Environment** drop down.



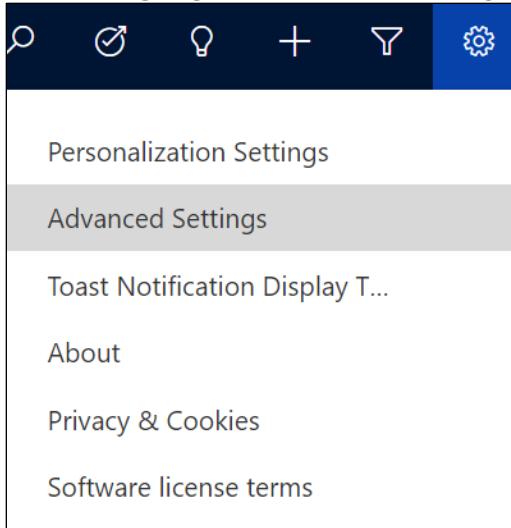
24. Select **Apps** on the left navigation bar.



1. Open the **Omnichannel Administration** app.

A screenshot of the "Omnichannel Administration" app. At the top, it says "Apps" and shows tabs for "Apps" (which is underlined) and "Component libraries (preview)". A red banner at the top indicates "⚠️ 4 environment variables need to be updated. See environment variables". Below is a table with columns "Name" and "Modified". It lists two items: "Omnichannel admin center" (modified 3 wk ago) and "Omnichannel Administration" (modified 3 wk ago). The "Omnichannel Administration" row is currently selected, indicated by a grey background.

2. Select the **gauge icon** in the upper right corner and navigate to **Advanced Settings**.



3. A new window should open and navigate to Dynamics 365. It may take a while to load. If it's been longer than a minute, stop and reload the page. It should then load faster.

4. In **Dynamics 365**, select **Settings > Security**.

A screenshot of the Dynamics 365 Settings page. The top navigation bar shows 'Dynamics 365' and 'Business Management'. Below the navigation is a red banner with a gear icon and the word 'Settings'. The main content area is divided into three columns: 'Business', 'Customization', and 'System'. The 'System' column contains several options: Administration, Security (which is highlighted with a grey background), Data Management, System Jobs, Document Manage..., and Auditing.

5. Under Security, select **Users**.

A screenshot of the Security page under the 'System' section. The title is 'Security'. Below it is a heading 'Which feature would you like to work with?'. There is a section titled 'Users' with a user icon, a brief description: 'Add new users. Edit information about users and deactivate user records. Manage the teams, roles, and licenses assigned to users.', and a 'Manage' button.

6. Switch the view drop down from Omnichannel Users to **Enabled Users** for the grid view so that your user will show in the list.

The screenshot shows a dropdown menu titled 'Omnichannel Users'. Under the heading 'System Views', there is a list of user categories. The 'Enabled Users' option is highlighted with a light blue background. Other options include '@Me', 'Access Mode Interactive Users', 'Administrative Access Users', 'Administrators', 'Agents', 'All', 'Application Users', 'Associated Record Team Members', 'Bot agents', 'Bot Users', 'By Me', 'Disabled Users', 'Disabled users consuming licenses', 'Enabled Users' (which is selected), and 'Full Access Users'.

7. While in the Enabled User list, scroll down to **find your user** or use the **Search** bar.

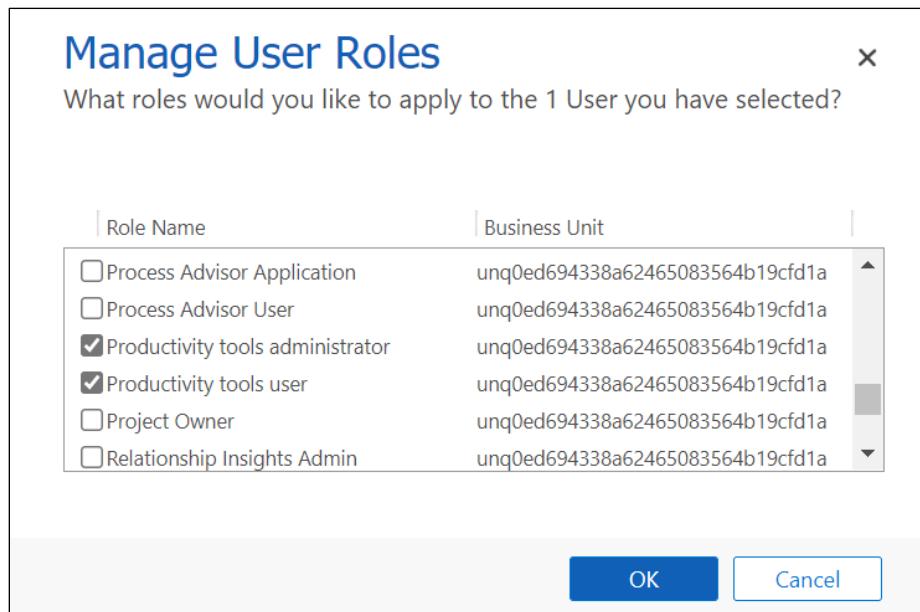
The screenshot shows a search results grid with a single entry. The search bar at the top contains the text 'iad'. The grid has columns for 'Full Name ↑', 'Position', 'Main Phone', 'Business Unit', 'Site', 'Title', and 'Primary Email'. The entry 'IAD User 01' is listed under 'Full Name' with the primary email 'IADUser01@PowerPlatformOp...'.

8. Select your user for the training and select **Manage Roles** on the top command bar.

The screenshot shows a user list grid with a single entry selected. The top navigation bar includes 'Dynamics 365', 'Settings', 'Security', and a 'Sandbox' indicator. The command bar below the navigation bar includes buttons for '+ NEW', 'EDIT', 'APPROVE EMAIL', 'REJECT EMAIL', 'PROMOTE TO ADMIN', 'MANAGE ROLES' (which is highlighted), and 'CHANGE BUSINESS UNIT'. The selected user in the grid is 'IAD User 01' with the primary email 'IADUser01@PowerPlatformOp...'. The grid has columns for 'Full Name ↑', 'Position', 'Main Phone', 'Business Unit', and 'Site'.

9. Scroll down and select the following two roles to your user and select **OK**.

- a. **Productivity tools administrator**
- b. **Productivity tools user**



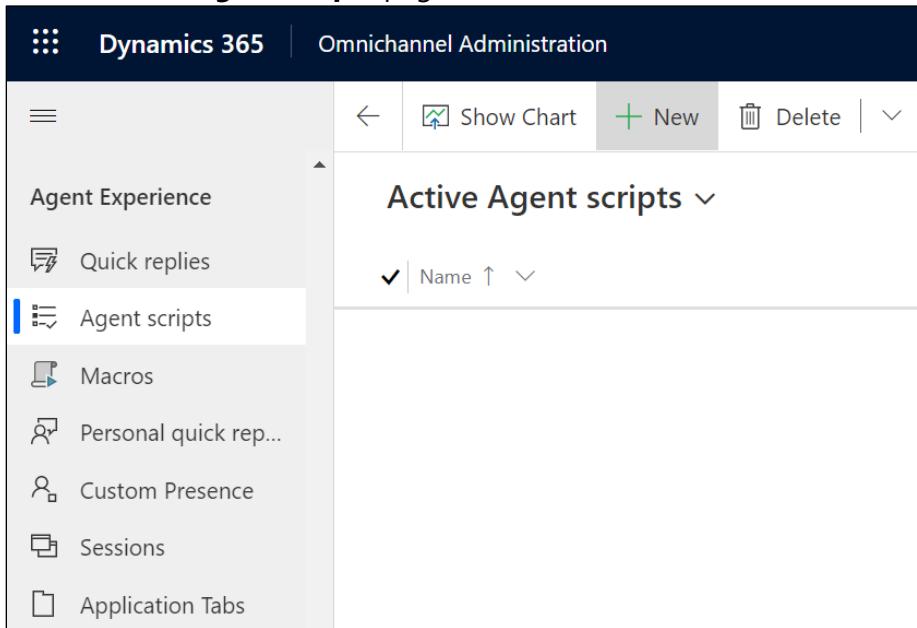
*Note: You will assign more roles in this lab. It is recommended to leave the User screen open.*

**Congratulations!** You have successfully assigned the necessary **Productivity tools** user roles to set up and use agent scripts.

## Task 2: Create an Agent Script

In this task, you will create an agent script in the Omnichannel Administration app. This script will guide the agent to **validate patient information** when a conversation is initiated between a patient and an agent in Patient Service Center. The script will have two steps, one to **confirm phone information** and another to **verify insurance information**. This task will guide you through creation of this agent script and its steps.

1. Navigate to **Omnichannel Administration** application which you opened in the first task.
2. In the left navigation bar, under **Agent Experience**, select **Agent Scripts**.
3. On the **Active Agent scripts** page, select **+New**.



4. For the **New Agent script** record, specify the following:
  - a. **Name:** Validate Patient Information
  - b. **Unique Name:** msdyn\_ValidatePatientInformation

The screenshot shows the 'New Agent script' form. The title is 'New Agent script' and the tab is 'General'. The form fields are:

- Name: \* Validate Patient Information
- Unique Name: \* msdyn\_ValidatePatientInfor...
- Owner: \* Allen Contoso
- Language: \* English (United States)
- Description: ---

5. Click **Save**. The **Agent script steps** should appear on the right

Validate Patient Information  
Agent script

General Related

Name \* Validate Patient Information  
Unique Name \* msdyn\_ValidatePatientInfor...  
Owner \* Allen Contoso  
Language \* English (United States)  
Description ---

Agent script steps

+ New Agent script step

No data available.

6. In the **Agent script steps** section, select **+New Agent script step**.

Agent script steps

+ New Agent script step

✓ Name Order ↑ Action type Modified On

No data available.

7. Quick Create form for the **Agent script step** appears. Specify the following fields:

- a. **Name:** Confirm Phone Number
- b. **Unique Name:** msdyn\_ConfirmPhone
- c. **Order:** 1
- d. **Action type:** Text
- e. **Text instructions:** Ask patient to confirm phone number.

Quick Create: Agent script step

Name	* Confirm Phone Number
Unique Name	* msdyn_ConfirmPhone
Owner	*  Allen Contoso
Agent script	 Validate Patient Information
Order	* 1
Action type	* Text
Text instructions	* Ask patient to confirm phone number.

8. Click **Save and Close**. Now let's add another step.
9. In the **Agent script steps** section, select **+New Agent script step** again.

Agent script steps			 New Agent script step	
 Name	Order ↑	Action type	Modified On	
Confirm Phone Number	1	Text	9/13/2021 3:19 PM	

10. Another **Quick Create** form for the **Agent script step** appears. Specify the following fields:
  - a. **Name:** Verify Insurance Information
  - b. **Unique Name:** msdyn\_VerifyInsuranceInformation
  - c. **Order:** 2
  - d. **Action type:** Text
  - e. **Text instructions:** Ask Patient for Insurance Provider and ID #. Verify their response matches insurance information on file.

Quick Create: Agent script step

Name	* Verify Insurance Information
Unique Name	* msdyn_VerifyInsuranceInformation
Owner	*  Allen Contoso
Agent script	Validate Patient Information
Order	* 2
Action type	* Text
Text instructions	* Ask Patient for Insurance Provider and ID #. Verify their response matches

11. Select **Save and Close**. Both steps should now be in the **Agent script steps** table.

Agent script steps			
	+ New Agent script step	:	
✓ Name	Order ↑	Action type	Modified On
Confirm Phone Number	1	Text	9/13/2021 3:19 PM
Verify Insurance Information	2	Text	9/13/2021 3:23 PM

12. The agent script is now complete. Select **Save & Close**.

Validate Patient Information

Agent script

General	Related												
Name * Validate Patient Information <input type="checkbox"/> Unique Name * msdyn_ValidatePatientInfor... Owner *  Allen Contoso Language * English (United States) Description ---	Agent script steps <table border="1"> <thead> <tr> <th>✓ Name</th> <th>Order ↑</th> <th>Action type</th> <th>Modified On</th> </tr> </thead> <tbody> <tr> <td>Confirm Phone Number</td> <td>1</td> <td>Text</td> <td>9/13/2021 3:19 PM</td> </tr> <tr> <td>Verify Insurance Information</td> <td>2</td> <td>Text</td> <td>9/13/2021 3:23 PM</td> </tr> </tbody> </table>	✓ Name	Order ↑	Action type	Modified On	Confirm Phone Number	1	Text	9/13/2021 3:19 PM	Verify Insurance Information	2	Text	9/13/2021 3:23 PM
✓ Name	Order ↑	Action type	Modified On										
Confirm Phone Number	1	Text	9/13/2021 3:19 PM										
Verify Insurance Information	2	Text	9/13/2021 3:23 PM										

**Congratulations!** You have completed creating an agent script with two steps to validate patient information, including phone number and insurance information.

### Task 3: Associate the Agent Script with a Session Template

In this task, you will associate the agent script with a session template so it will load for agents based on the type of session they've opened. We will be associating the agent script we just created with the **Default chat session**. This is the default chat session that opens during an escalation to an agent in Patient Service Center.

1. Open the **Omnichannel Administration** app in Power Apps if you aren't already in it.

The screenshot shows the 'Apps' screen of the Omnidirectional Administration app. At the top, there are two tabs: 'Apps' (which is selected) and 'Component libraries (preview)'. Below the tabs, a red banner displays a warning: '⚠️ 4 environment variables need to be updated. See environment variables'. The main area is a table with columns 'Name' and 'Modified'. It lists two apps: 'Omnichannel admin center' and 'Omnichannel Administration'. The 'Omnichannel Administration' app is selected, indicated by a checkmark icon next to its name.

Name	Modified
Omnichannel admin center	3 wk ago
<b>Omnichannel Administration</b>	3 wk ago

2. In the left navigation bar, under **Agent Experience**, select **Sessions**.

The screenshot shows the 'Agent Experience' navigation bar. The 'Sessions' option is highlighted with a blue vertical bar on its left, indicating it is selected. Other options include 'Quick replies', 'Agent scripts', 'Macros', 'Personal quick rep...', 'Custom Presence', 'Application Tabs', and 'Notifications'.

3. Select the **Chat session – default** session template. We will associate this session with the agent script.

The screenshot shows the 'Active Session Templates' list. The 'Name ↑' sorting header is visible. Three templates are listed: 'Case entity session - default template', 'Chat session - default' (which is selected and highlighted in blue), and 'Entity records session - default'.

Name ↑
Case entity session - default template
<b>Chat session - default</b>
Entity records session - default

4. Double click or select Edit on the command bar to open the **Chat session – default** record.

**Chat session - default**  
Session Template

General Agent scripts Related

Name	* Chat session - default
Unique Name	* msdyn_chat_session
Type	* Generic
Title	{customerName}
Communication panel mode	* Docked
Description	This is the default session template for Chat channel

5. Select the **Agent scripts** tab. In the **Agent scripts** section, select **Add Existing Agent script**.

**Chat session - default**  
Session Template

General Agent scripts Related

Agent scripts

Add Existing Agent scr... :

Name	Created On
No data available.	

6. The **Lookup Records** pane should appear on the right.

Lookup Records X

Select record

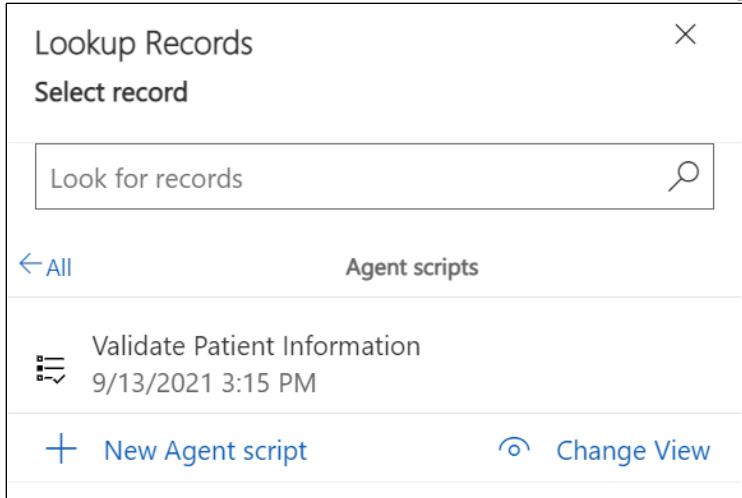
Look for Records 🔍

Recent records All records

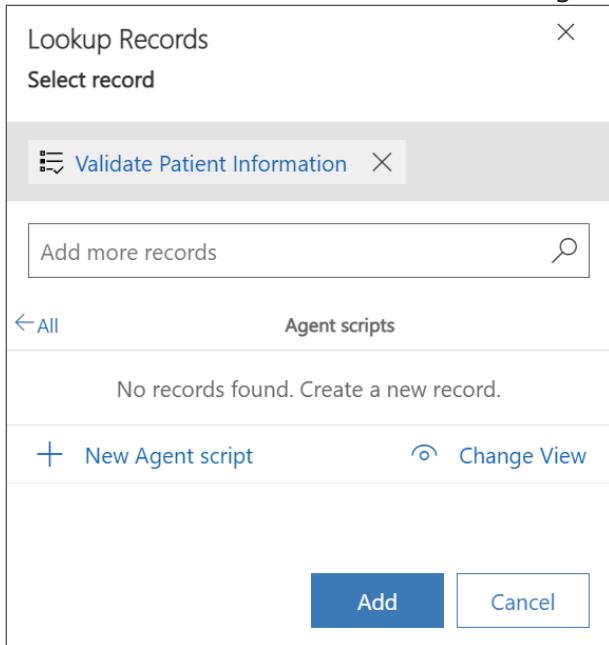
🕒 Validate Patient Information

+ New Record

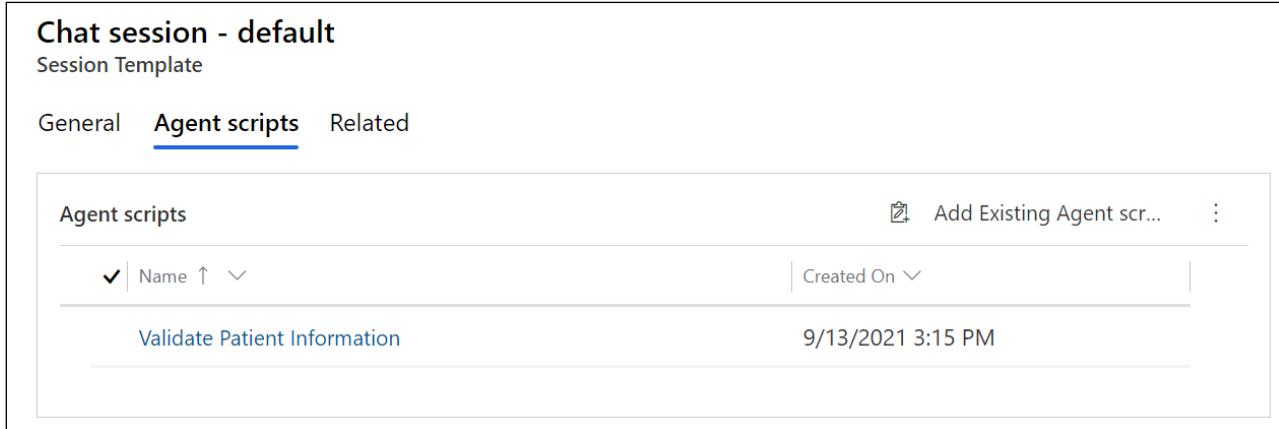
7. In the **Look for Records** box, select the **search icon** (magnifying glass).



8. Select the **Validate Patient Information** agent script from the list and click **Add**.



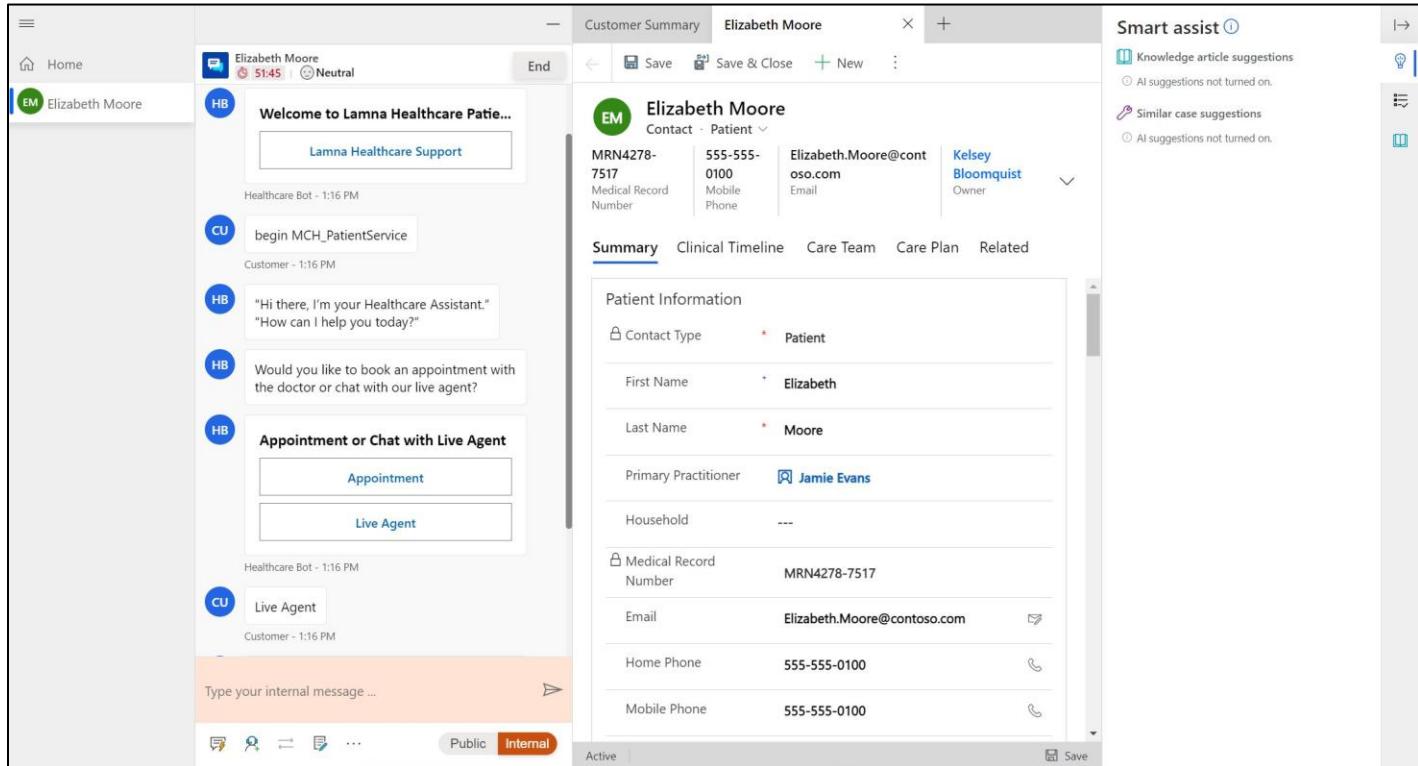
9. **Chat session – default** Session Template should have the **Validate Patient Information** Agent script.



**Congratulations!** You have successfully created an agent script with two steps and associated the agent script with the default chat session. Now your agents can use this script during a default chat session with a patient.

# Exercise 3: Configure Knowledge Articles

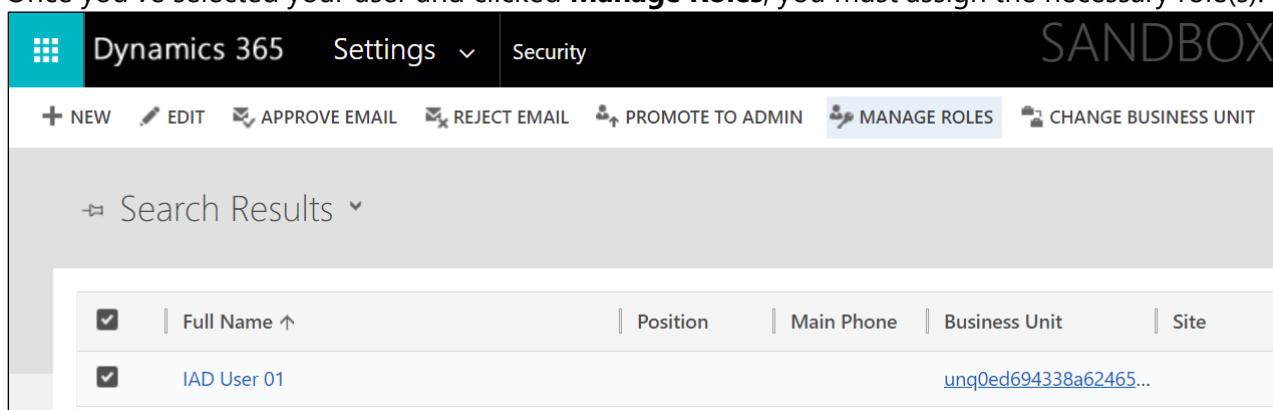
In this exercise, you will learn how to create and manage **Knowledge Articles** that can address any number of issues your customers would like to discuss during the patient service center conversation. These knowledge articles will appear in the productivity pane in Patient Service Center through AI-enabled suggestions.



## Task 1: Assign Knowledge Manager User Role

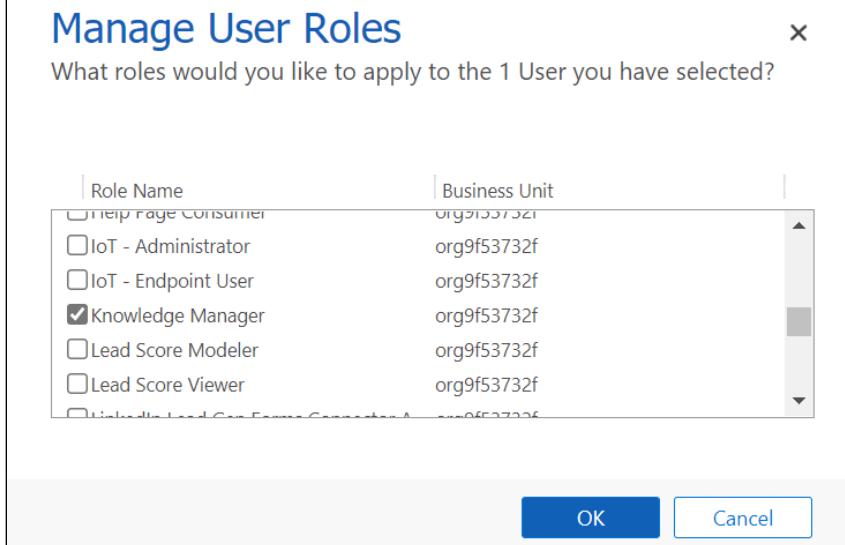
In this task, we will assign the necessary user role to create and view knowledge articles.

1. If you kept the User Settings page up from the previous exercise, navigate to that page. If you didn't keep it open, follow all the steps in Exercise 2, Task 1 and then return here to assign the proper role.
2. Once you've selected your user and clicked **Manage Roles**, you must assign the necessary role(s).

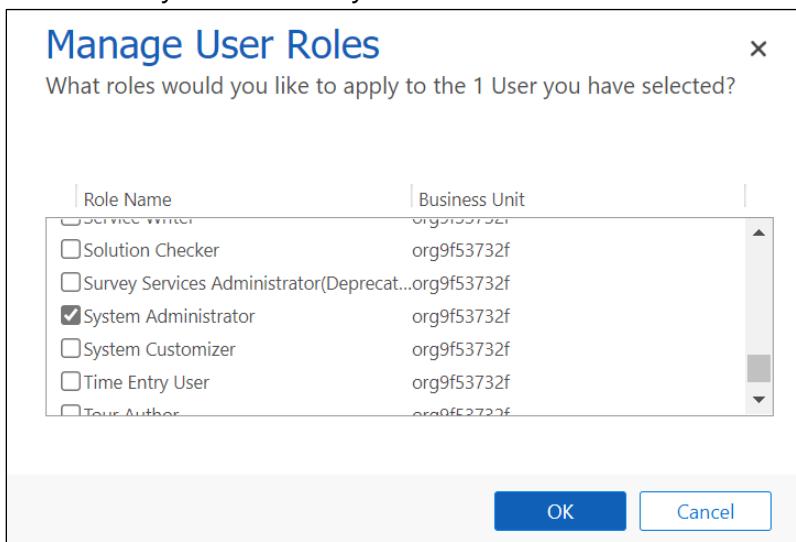


3. There are three roles you can choose with [create/read permissions for Knowledge Articles](#).
  - i. Knowledge Manager
  - ii. Customer Service Manager
  - iii. Customer Service Representative

4. For this lab, select the **Knowledge Manager** role.



5. Also ensure you have the System Administrator role. Official training users have it assigned.



6. Select **OK** to close the Manage User Roles window and accept changes.

**Congratulations!** You have assigned the proper roles to create and read knowledge articles.

## Task 2: Set up Knowledge Management Settings

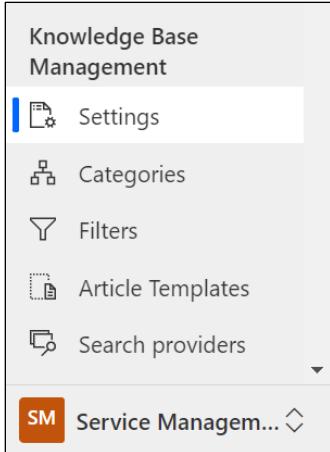
1. In [Power Apps](#), open the **Customer Service Hub** app.

The screenshot shows the Power Apps portal interface. On the left, there's a navigation bar with Home, Learn, Apps (selected), Create, Dataverse, Flows, and Chatbots. The main area is titled 'Apps' and shows two entries: 'Customer Service workspace' and 'Customer Service Hub'. A message at the top right says '10 environment variables need to be updated. See environment variables'. The 'Customer Service Hub' entry has a modified date of '3 wk ago'.

1. In Customer Service Hub, on the left navigation bar, go to the bottom left corner where there's a drop down that says **Service**. Select it and change the area to **Service Management**.

The screenshot shows the left navigation bar of the Customer Service Hub. It includes sections for Home, Recent, Pinned, My Work (with Dashboards and Activities), Customers (Accounts, Contacts, Social Profiles), Service (Cases, Queues), Knowledge (Knowledge Articles), and a 'Change area' dropdown. The 'Change area' dropdown is open, showing options: Service (checked), Service Management (selected), Scheduling, Help and Support, and Service (button). The 'Service' button at the bottom is highlighted.

2. Once in the Service Management area, scroll down to **Knowledge Base Management** section and select **Settings** in the left navigation.



3. **Record Types** allows you to configure the record types you want to turn on for knowledge management.
- The list will include all entities that are available for an N:N relationship.
  - Knowledge management is enabled for **Case** table by default. Because our scenario will also use the Case table, **we don't need to add any additional tables at this time.**

The screenshot shows the 'Record Types' configuration screen. It includes a header 'Embedded Knowledge Search' and a sub-section 'Record Types'. A note says 'Select the record types for which you want to turn on knowledge base management.' Below this are two lists: 'Available' (containing Account, Bookable Resource, Bookable Resource Booking, Bookable Resource Booking Header, Bookable Resource Category, Bookable Resource Category Assn, Bookable Resource Characteristic, Bookable Resource Group, Booking Status) and 'Selected' (containing Case, Contact). Between the lists are four buttons: >, >>, <<, and <.

4. For Support Portal Connection, this allows you to integrate an external portal for publishing knowledge articles.
- Selecting Yes would share the knowledge article as a link in the email sent to the customer.
  - Selecting No would share the article content inserted in the email body.
  - Keep as **No** as we will not be integrating an external portal connection

The screenshot shows the 'Support portal connection' settings. It includes a note 'To share knowledge article as URLs, you'll need to first set up an external portal and turn on the setting below.' Below this is a toggle switch labeled 'Use an external portal' with the value 'No'.

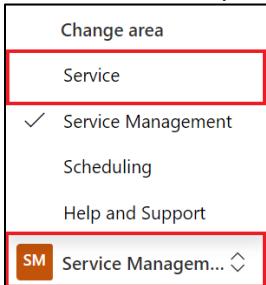
5. In the **Knowledge Articles Feedback** section, set **Enable users to provide feedback on knowledge articles from search control** to **Yes**. This will allow users to provide feedback on knowledge articles opened from knowledge search control.

The screenshot shows the 'Knowledge articles feedback' settings. It includes a note 'Enable users to provide feedback on knowledge articles from search control.' Below this is a toggle switch labeled 'Enable feedback' with the value 'Yes'.

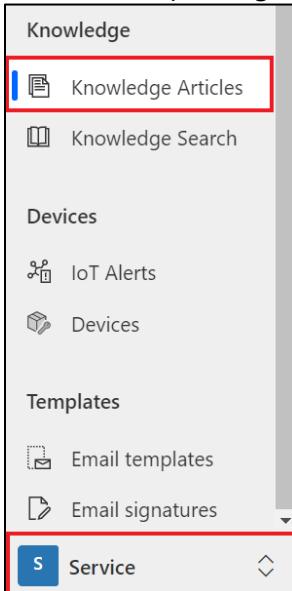
### Task 3: Create Knowledge Article

In this task, you will create a new knowledge article about Asthma for agents to access during patient conversations.

1. In **Customer Service Hub**, on the left navigation bar, go to the bottom left corner where you previously modified the drop down. Change it back from Service Management to **Service**.



2. In the sitemap, navigate to **Service > Knowledge Articles**.



3. Select **New on the command bar**.

SANDBOX

My Active Articles

No data available.

New Knowledge Article

New Process

Author (< 1 Min)

Review

Publish

Content

Title

Description

Keywords

Article Public N... Title Status Major Version N... Minor Version N... Views Modified On Language

4. You should be on the **Content** tab of a new knowledge article.

New Knowledge Article

New Process

Author (< 1 Min)

Review

Publish

Content

ARTICLE CONTENT

Title

Description

Keywords

English - United States

Proposed Status Reason

5. On the **Article Content** section of the new knowledge article, specify the following details:

- Title:** Shortness of Breath
- Keywords:** Asthma, shortness of breath, trouble breathing, inhaler, albuterol
- Description:** Uncomfortable sensation or awareness of breathing or needing to breathe.

New Knowledge Article

New Process

Author (< 1 Min)

Review

Publish

Content

ARTICLE CONTENT

Title

Description

Keywords

English - United States

Proposed Status Reason

Shortness of Breath

Asthma, shortness of breath, trouble breathing

Uncomfortable sensation or awareness of breathing or needing to breathe.

d. In the **Content** section, copy and paste the content for your knowledge article.

## Common causes

Shortness of breath is not always related to an underlying condition. It may be caused by:

- Aerobic exercise
- Intense physical activity
- High altitude with lower oxygen levels
- Poor cardiovascular fitness
- Anxiety
- Being obese
- General weakness

## Treatment

**Self-treatment:** Self- care steps that may be helpful in some less- serious cases:

- Stop smoking
- Avoid exposure to pollutants, allergens and environmental toxins
- Lose weight if overweight
- Avoid exertion at elevations
- Take slow even breaths
- When you breathe out, put your lips together, like slowly blowing out a candle (Pursed Lip Breathing)

## See a doctor if you notice:

- Chest pain or pressure
- Inability to function

## See a doctor immediately if you notice:

- Fever or a change in the amount, color, or thickness of sputum
- Breathlessness does not go away after resting for 30 minutes
- Swelling in the feet and ankles
- Trouble breathing when you lie flat
- High fever, chills, and cough
- Wheezing
- Worsening of pre-existing shortness of breath

## 6. Select Save.

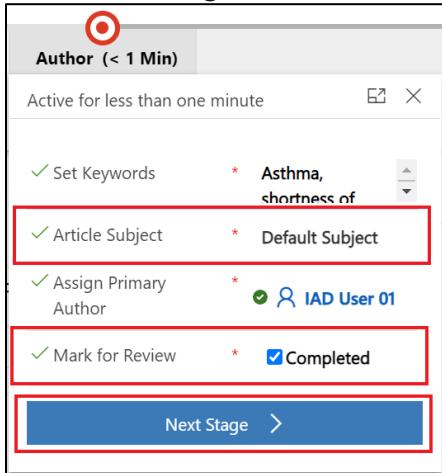
The screenshot shows the Microsoft Dynamics 365 form for creating a new knowledge article. At the top, there is a navigation bar with links for Save, Save & Close, New, New From Template, and Flow. To the right, it shows the language as English - United States and the status as Proposed. Below the navigation bar is a horizontal Business Process flow bar with four stages: New Process (Active for less than one minute), Author (< 1 Min), Review, and Publish. The Author stage is currently active. The main content area is titled "New Knowledge Article" and contains tabs for Content, Summary, Analytics, and Content. The Content tab is selected, showing "ARTICLE CONTENT" with fields for Title ("Shortness of Breath") and Description ("Uncomfortable sensation or awareness of breathing or needing to breathe"). It also lists Keywords ("Asthma, shortness of breath, trouble breathing"). Below this is a rich text editor toolbar and a section titled "Common causes" containing a bulleted list of causes for shortness of breath.

The Business Process flow bar at the top of the form helps you to drive the article towards completeness. You have the option to customize the stages in the Business Process flow to suit your requirements. We will now complete the author stage so it can move into review.

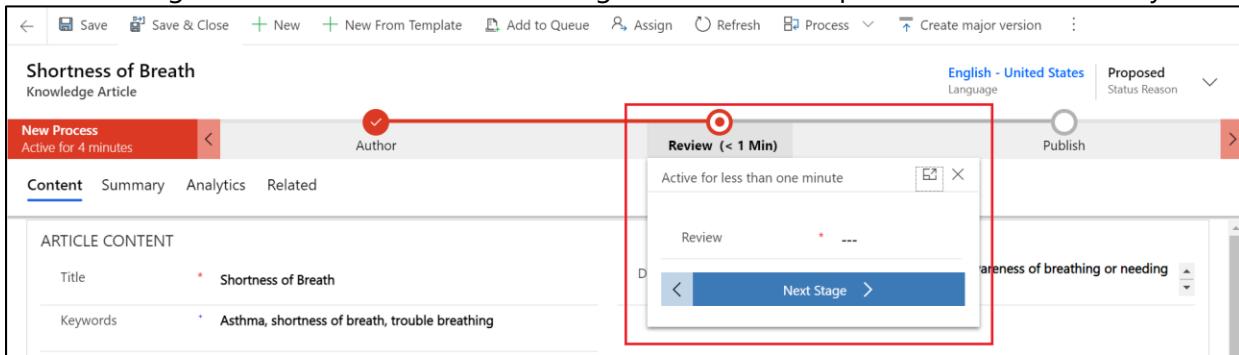
## 7. On the Business process bar, select **Author**. The business step options should pop out below.

This screenshot shows the same form after selecting the Author stage from the Business Process flow bar. A red box highlights the "Author (2 Min)" stage and the pop-up window that appears below it. The window is titled "Active for 2 minutes" and lists several business step options with checkboxes: "Set Keywords" (checked, with "Asthma, shortness of breath" listed), "Article Subject" (unchecked, with "---"), "Assign Primary Author" (checked, with "IAD User 01" listed), and "Mark for Review" (unchecked, with "Mark Complete" checked). At the bottom of this window is a blue "Next Stage >" button. The rest of the form remains the same, showing the "Common causes" section with its bullet points.

1. Add the **Article Subject**: Default Subject. This is the subject of the article to help with searches.
2. Check the box for **Mark for Review** as Mark Complete.
3. In the **Assign Primary Author** drop-down list, you may choose a person who is responsible for maintaining the article content. By default, the user who creates the article is the primary author. For this training, we will keep it as our IAD user.
4. Select **Next Stage** to mark the article complete and ready for review.



5. The knowledge article is now in the review stage of the business process flow and is ready for review.



**Congratulations!** You have successfully created a knowledge article for Shortness of Breath and marked it for review.

## Task 4: Review and Publish Knowledge Article

To ensure accuracy of the knowledge article, typically someone else would review and approve it. For this training exercise, you will mark the article reviewed and approved yourself. Quick note that this task also requires the Knowledge Manager role or another that can approve knowledge articles.

1. In Customer Service Hub, navigate to **Service > Dashboards**. Use the drop-down to choose the **My Knowledge Dashboard**.

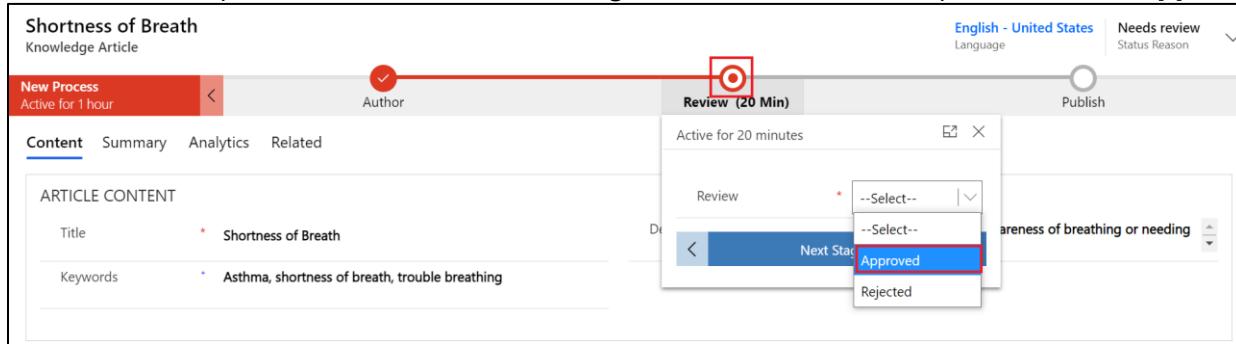
The screenshot shows the Dynamics 365 Customer Service Hub interface. On the left, there is a navigation bar with various links like Home, Recent, Pinned, My Work (with Dashboards selected), Customers, Service, Knowledge, Devices, and Service. The main area is titled 'Sandbox' and shows a 'Tier 1 Dashboard'. A dropdown menu is open under 'System Dashboards' with several options listed, including 'Knowledge Manager', which is also highlighted with a red box. Below the dashboard, there are sections for 'My Resolved Cases', 'My Draft Emails', and 'My Activities', each showing a message 'No data available.'

2. Note the **Shortness of Breath** knowledge article in **My Active Articles** stream.

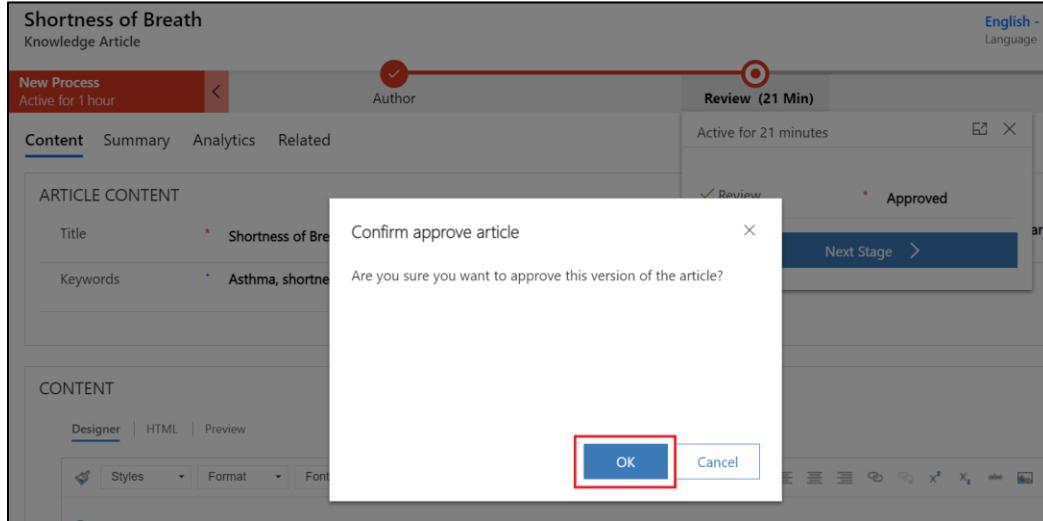
The screenshot shows the Dynamics 365 Customer Service Hub interface. The navigation bar is identical to the previous screenshot. The main area is titled 'Sandbox' and shows a 'My Knowledge Dashboard'. The 'My Active Articles' stream is visible, with the 'Shortness of Breath' article highlighted by a red box. This article is categorized under 'Modified On' and has a status of 'Needs review'. To the right, there are four data visualization cards: 'By Subject' (a chart showing 0 views for the Default Subject), 'Views by Subject' (a chart showing 0 views for the Default Subject), 'By Owner' (a chart showing 1 view for IAD User 01), and 'By Status Reason' (a pie chart showing 1 view for the 'Needs review' reason). On the right side, there is a section titled 'Other Queues and Views' with three items: 'My Published Articles Filtered' (0), 'My Expired Articles Filtered' (0), and 'My Articles Expiring ... Filtered' (0).

3. Select the **Shortness of Breath** knowledge article.

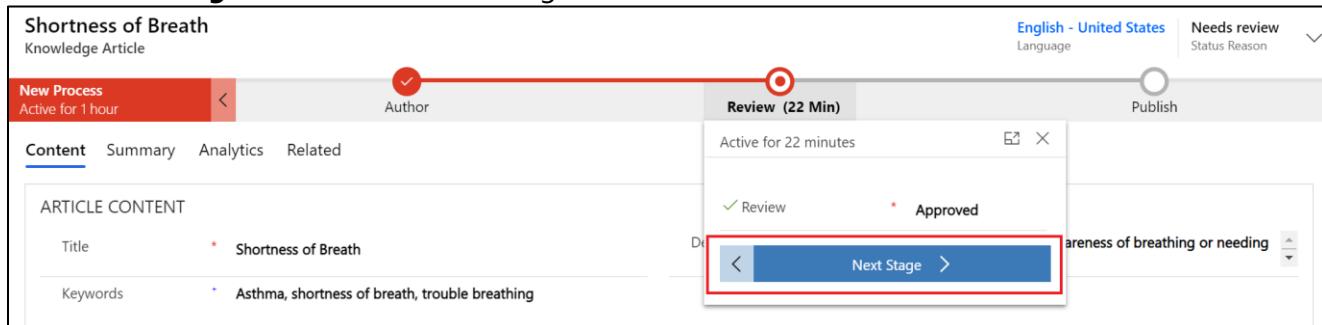
4. On the Business process bar, in the **Review** stage and in the **Review** drop-down, select **Approve**.



5. Click **OK** when prompted to **Confirm approve article**.



6. Select **Next Stage** to move to Publish stage.



7. You should now be in the **Publish** stage and **Status Reason** should have changed to **Approved**.



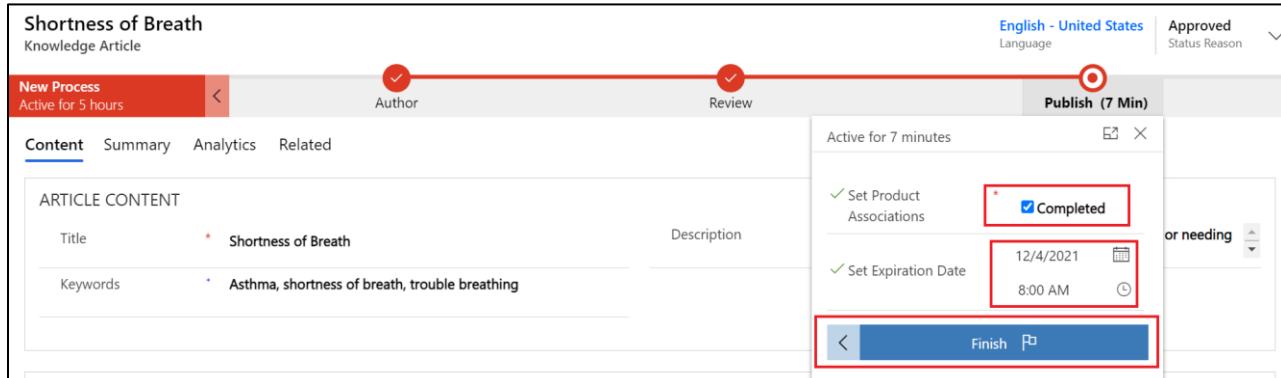
**Congratulations!** You have successfully reviewed and approved the knowledge article. We will show you how to publish the Knowledge Articles to be available during patient service center calls.

## Task 5: Publish your Knowledge Article

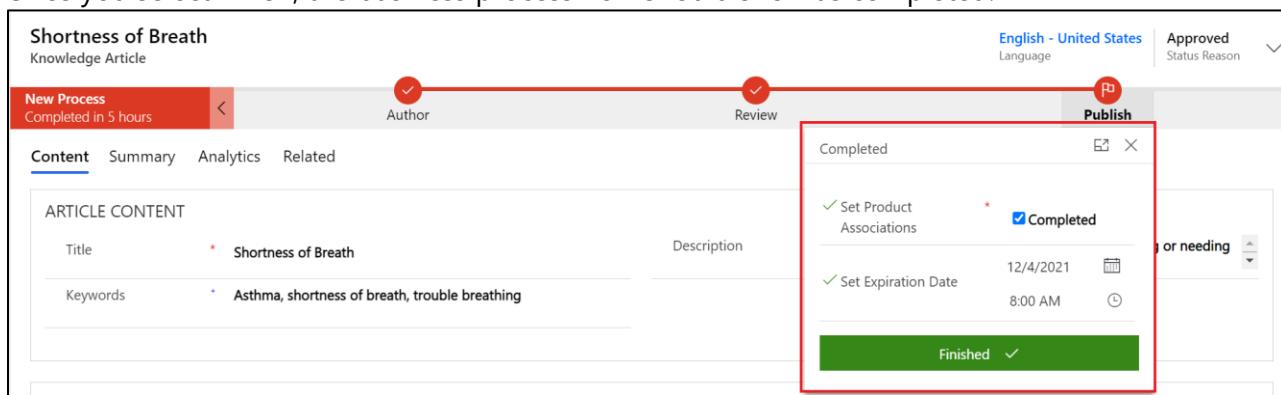
In this task, you will learn how to publish the knowledge article so it's live and ready to be used.

1. In your **Shortness of Breath** Knowledge Article, Select the **Publish** stage.

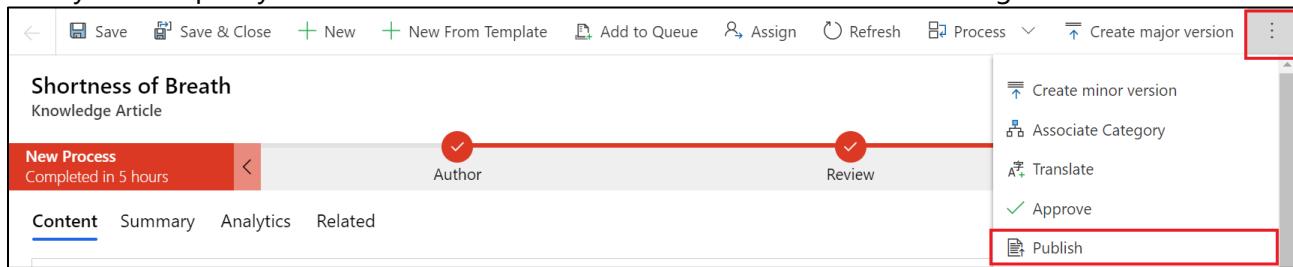
- a. For **Set Product Associated** check the box **Completed**.
- b. Add an **Expiration Date** for one year from now.
- c. Select **Finish**



2. Once you select Finish, the business process flow should show as completed.



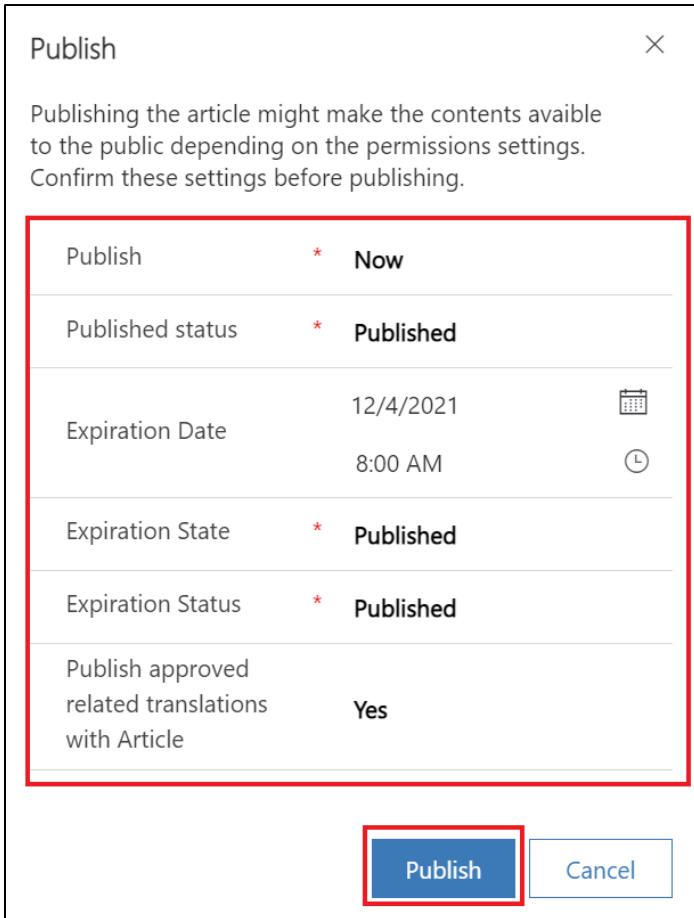
3. Now you can specify the additional Publish details. On the command bar to go **More > Publish**.



4. Specify the following details (see screenshot below):

- a. **Publish:** Now
- b. **Published Status:** Published
- c. **Expiration State:** Published
- d. **Expiration Status:** Published
- e. **Publish approved related translations with Article**, choose Yes.

5. Select **Publish**



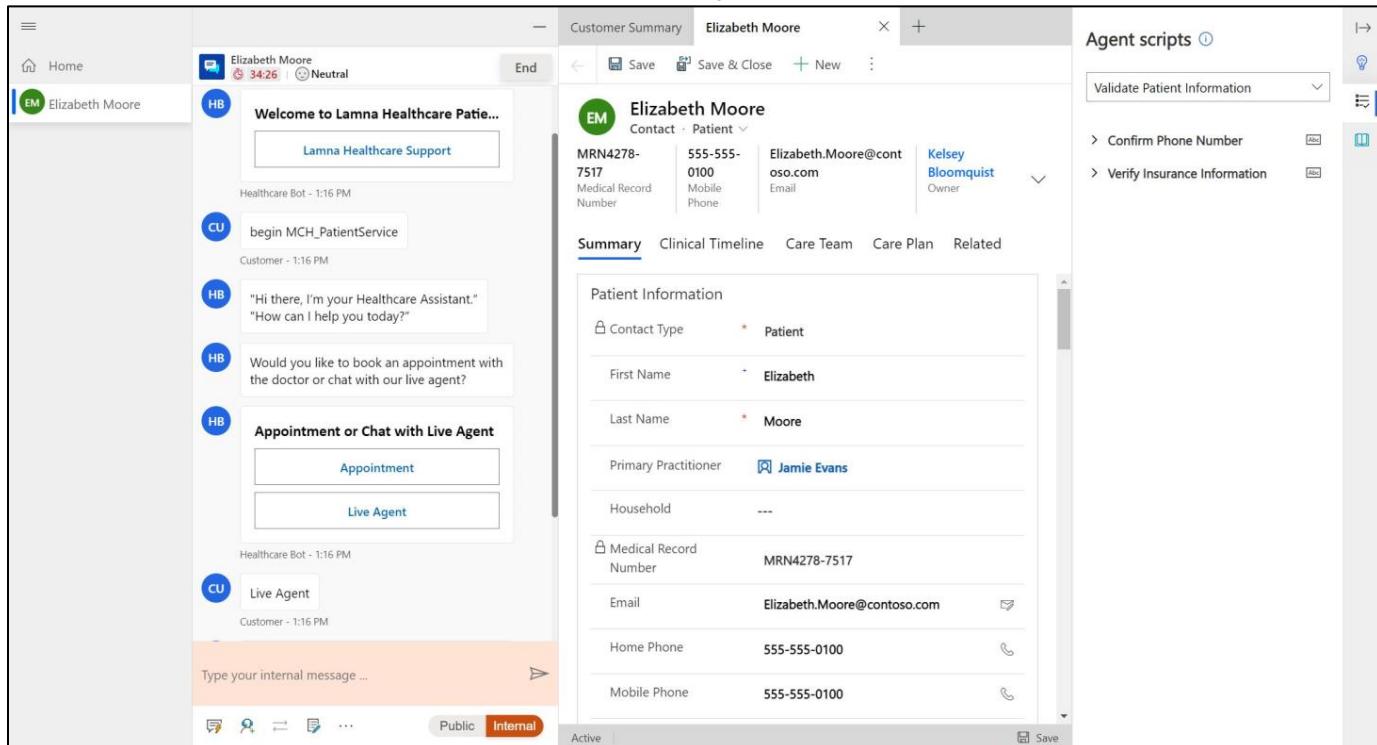
**Congratulations!** You have successfully reviewed and published the knowledge article. We will see these knowledge articles highlighted in Patient Service Center when testing the final escalation.

# Exercise 4: Experience Escalation & Smart Assist Features

In this exercise, you will utilize the Smart Assist features and test the full experience you configured for the patient and patient service center agent. Starting from when the patient logs into the portal website, continuing with a health bot conversation, and ending with an escalation to a human agent who can provide proper care in Dynamics 365 with Agent Scripts and Knowledge Articles.

The following screen shows Patient Service Center after a patient has been escalated to a call agent. This lab will conclude by bringing together all the components we've set up in previous exercises and show how the call agent can give personalized experiences with proposed insights directly in the application.

Find out more about [Patient Service Center](#), [Productivity tools](#), and [App Profiles](#) on Microsoft Docs.

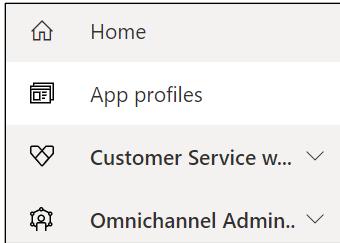


## Task 1: Create App Profile Manager to Enable Smart Assist Features

1. Navigate **Apps** within to Power Apps.
2. Go to **Customer Service workspace** > more commands (...) > App Profile Manager.  
*If the page will not open and you are using Edge, please try Chrome.*

This screenshot shows the Microsoft Power Apps portal. In the top navigation bar, 'Customer Service workspace' is selected. Below it, there's a message about environment variables. The main area lists two apps: 'Customer Service workspace' and 'Customer Service Hub'. For each app, there are several actions available: Edit, Play, Share, Performance (preview), Monitor, Delete, Settings, Details, Deactivate, and App profile manager. The 'App profile manager' option is highlighted with a red box, indicating it is the target for this task.

3. Select **App profiles** on the left navigation.



4. On the **App profile manager** page, select **+New profile**.

A screenshot of the 'Power Apps | App profile manager' page. The left sidebar shows the same navigation options as the previous screenshot. The main area is titled 'App profiles' and lists three existing profiles: 'Customer Service workspace + channels - default profile', 'Omnichannel for Customer Service - default profile', and 'Customer Service workspace - default profile'. At the top right, there is a '+ New profile' button and a 'Refresh' button.

5. Add the following details for the new profile:

- Name:** Industry Labs Profile
- Unique Name:** MCH\_IndustryLabsProfile

A screenshot of a 'New profile' dialog box. It contains fields for 'Name \*' (filled with 'Industry Labs Profile') and 'Unique name \*' (filled with 'MCH\_IndustryLabsProfile'). Below these fields, there is explanatory text: 'The unique name must include a prefix + name in this format: prefix\_name.' and 'The prefix must include:' followed by a bulleted list: 'Only alphanumeric characters' and '3-8 characters'. There is also a note: 'The name portion can be any length, but can't include spaces.' A 'Description' field is present but empty. At the bottom are 'Save' and 'Cancel' buttons.

6. Select the App Profile you just created for edit.

**App profiles**

Name
<input checked="" type="checkbox"/> Industry Labs Profile
<input type="checkbox"/> Customer Service workspace + channels - default profile
<input type="checkbox"/> Omnichannel for Customer Service - default profile
<input type="checkbox"/> Customer Service workspace - default profile

7. You will be landed on the Industry Labs Profile page.

**Industry Labs Profile**

Customize the user experience of this profile. [Learn more](#)

General Session templates Productivity pane Channels

Name: Industry Labs Profile [Edit](#)

Description:

The interface shows a productivity pane divided into four sections: Communication pane, Anchor tabs, Application tabs, and Productivity pane. A sidebar on the left contains a 'Session' section with a message input field. Labels point to each section: 'Communication pane', 'Anchor tabs', 'Application tabs', and 'Productivity pane'. A legend at the bottom right identifies icons for 'Session' (two circles), 'Communication pane' (speech bubble), 'Anchor tabs' (circle with lines), 'Application tabs' (square with lines), and 'Productivity pane' (square with lines).

Customizable features

8. Navigate to the **Session templates** tab and select **Add entity session template**.

**Industry Labs Profile**

Customize the user experience of this profile. [Learn more](#)

General Session templates Productivity pane Channels

**Entity session templates**  
Choose the session templates that should open when a new session starts.  
[Learn more](#)

+ Add entity session templates

9. Create a **new session template**. Click OK when prompted to open a Unified Interface tab.

The screenshot shows the 'Industry Labs Profile' settings page. At the top, there's a heading 'Customize the user experience of this profile.' Below it, a 'Session templates' tab is selected, indicated by a purple underline. Other tabs include 'General', 'Productivity pane', and 'Channels'. A section titled 'Entity session templates' asks to choose session templates for new sessions, with a link to 'Learn more'. A search bar is present, and a button labeled 'Create a new template in Unified Interface' is visible.

10. Fill in values for the new session template. Ensure the prefix follows rules outlined in [Microsoft Docs](#).

**Name:** Industry Labs Session

**Unique Name:** MCH\_IndustryLabsSession

**Type:** Entity (must choose entity here to use in app profile)

**Entity:** Case

The screenshot shows the 'New Session Template' dialog. The 'General' tab is selected. The form fields are as follows:

Name	*	Industry Labs Session
Unique Name	*	MCH_IndustryLabsSession
Type	*	Entity
Entity	*	Case
Title	---	
Communication panel mode	*	Hidden
Description	---	
Owner	*	IAD User 99

11. Select **Save**.

12. Select the **Agent Scripts** tab.

13. Select **Add existing Agent Script**.

Industry Labs Session  
Session Template

General Agent scripts Related

Agent scripts

Add Existing Agent scr...

No data available.

14. Search for the **Validate Patient Information** script and add it.

Lookup Records

Select record

Validate Patient Information

Add more records

Type to search or press Enter to browse

New Record

Add Cancel

15. Click **Save & Close**.

Save & Close

Make sure to choose the right session template type—once you save, the type can't be changed.

Industry Labs Session  
Session Template

General Agent scripts Related

Agent scripts

Add Existing Agent scr...

Validate Patient Information

9/16/2021 9:04 AM

16. On the Industry Labs Profile page, add the new entity session template you created. *If you don't see any templates listed, try typing a space or pressing enter to trigger the search.*

**Industry Labs Profile**

Customize the user experience of this profile. [Learn more](#)

General    **Session templates**    Productivity pane    Channels

**Entity session templates**  
Choose the session templates that should open when a new session starts.  
[Learn more](#)

X

- Industry Labs Session
- Case entity session - default templ.

**Industry Labs Profile**

Customize the user experience of this profile. [Learn more](#)

General    **Session templates**    Productivity pane    Channels

**Entity session templates**  
Choose the session templates that should open when a new session starts.  
[Learn more](#)

Industry Labs Session ...

+ Add entity session templates

17. Select the Productivity pane tab and enable **all the options**.

The screenshot shows the 'Industry Labs Profile' settings page. The 'Productivity pane' tab is selected. Under the 'Productivity tools' section, three features are enabled: 'Smart assist', 'Knowledge search', and 'Agent scripts'. Each feature has a description and a toggle switch set to 'On'.

**Industry Labs Profile**

Customize the user experience of this profile. [Learn more](#)

General Session templates **Productivity pane** Channels

When the productivity pane is on, you can customize it by choosing productivity tools. [Learn more](#)

Turn on productivity pane  On

Default mode  Expanded

**Productivity tools**

Smart assist  On  
Make intelligent recommendations of knowledge articles, similar cases, and more based on real-time context. [Learn more](#)

Knowledge search  On  
Let users search for relevant knowledge articles. [Learn more](#)

Agent scripts  On  
Give step-by-step instructions to help minimize human error and provide consistent service. [Learn more](#)

18. Go to channels and enable all active channels

The screenshot shows the 'Industry Labs Profile' settings page. The 'Channels' tab is selected. Under the 'Omnichannel for Customer Service' section, the 'All active channels' option is enabled. A description states that if turned on, every channel set up in Omnichannel for Customer Service will be included.

**Industry Labs Profile**

Customize the user experience of this profile. [Learn more](#)

General Session templates Productivity pane **Channels**

**Omnichannel for Customer Service**  
If this is turned on, every channel you have set up in Omnichannel for Customer Service will be included in this app profile. [Learn more](#)

All active channels  On

**Congratulations!** You created a new app profile and associated a new session template.

## Task 2: Patient Logs into Access Portal & Agent logs into Patient Service Center

19. Navigate to Power Apps and open the **Lamna Healthcare Patient Portal** app.
20. Sign into the Patient Portal as Autumnn Atkins, using the credentials you created in Exercise 1, Task 2 when you registered Autumn for the patient portal.

The screenshot shows the Contoso Healthcare Patient Portal sign-in screen. At the top, there is a logo and the text "Contoso Healthcare". Below it are three buttons: "Sign in" (highlighted in red), "Register", and "Redeem invitation". The main area has two sections: "Sign in with a local account" and "Sign in with an external account". Under "Sign in with a local account", there are fields for "Username" (containing "AutumnAtkins") and "Password" (redacted). There is also a "Remember me?" checkbox and two buttons at the bottom: "Sign in" and "Forgot your password?". Under "Sign in with an external account", there is a "Azure AD" button.

21. You should be directed to the profile if your email requires confirmation. Click **Contoso Healthcare** in the upper left to go to the portal Homepage.

The screenshot shows the Contoso Healthcare Patient Profile page for Autumnn Atkins. At the top, there is a logo and the name "Autumn Atkins". On the right, there is a dropdown menu showing "Autumn Atkins". The main area has a sidebar with links: "Profile", "Security" (with "Change Password" and "Change Email" options), and "Manage External Authentication". The main content area is titled "Your Information" and contains fields for "First Name \*" (containing "Autumn"), "Last Name \*" (containing "Atkins"), "Home Phone 2" (with placeholder "Provide a telephone number"), "E-mail" (containing "Autumn.Atkins@contoso.com"), and "Home Phone" (containing "425-555-0199"). Above these fields, a message says "Your email requires confirmation." with a "Confirm Email" button. Below the information, there is a section titled "How may we contact you? Select all that apply." with checkboxes for "Email", "Fax", "Phone", and "Mail", all of which are checked. A blue "Update" button is at the bottom. In the bottom right corner, there is a "Let's Chat!" button with the text "We're Online".

22. Your patient is ready to go in the Patient Portal. Now we need to make sure an agent is available for them when the Health Bot needs to escalate.

Contoso Healthcare

Autumn Atkins ▾

Home

Find a doctor

Messages

Appointments

Medical records

Personal information

Welcome Autumn Atkins

Schedule an appointment

View messages

Find a doctor

Unread messages

From Subject Received

There are no records to display.

Medications

Medication Ordered by Date started Refills

Asthma Inhaler Jamie Evans 5/3/2021 12:00 AM 3

Upcoming appointments

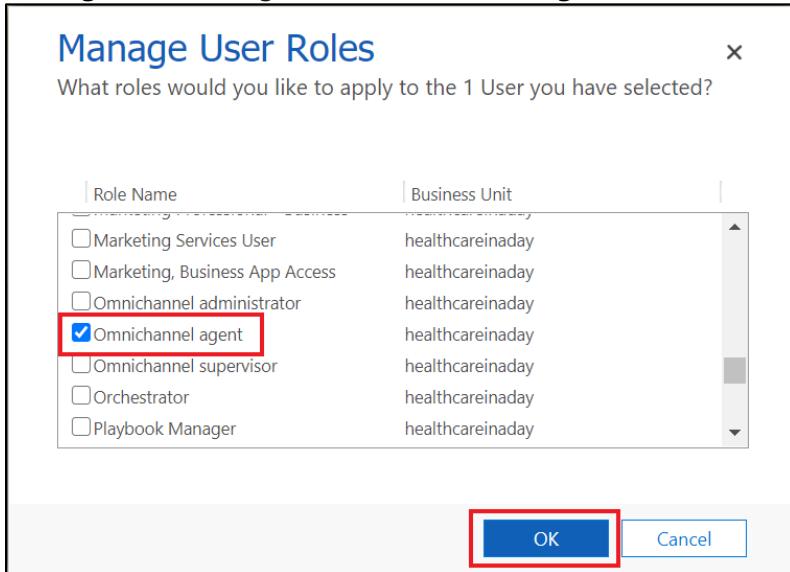
Date ↑ Provider Location

There are no records to display.

Let's Chat!  
We're Online

*Note: Before opening Patient Service Center, make sure you have completed adding the Omnichannel agent role to your user in Lab 04.*

23. If you didn't assign the Omnichannel agent role in Lab 04, assign the proper role by following the steps in Exercise 2, Task 1 – Assign Productivity User Roles. Once you've selected your user and clicked **Manage Roles**, assign the **Omnichannel agent** role and click **OK**.



24. Navigate to Apps and open the **Patient Service Center** app.

The screenshot shows the Microsoft Power Apps portal. On the left, there's a navigation bar with 'Home', 'Learn', 'Apps' (which is highlighted with a red box), 'Create', 'Data', 'Tables', and 'Choices'. The main area is titled 'Apps' and shows a list of apps. One app, 'Patient Service Center', is highlighted with a red box. A message at the top right says '6 environment variables need to be updated. See environment variables'.

25. In the **Patient Service Center**, you should see a "Loading..." splash screen that goes through percentages. This ensures the live agent status is captured properly.

The screenshot shows the Dynamics 365 Omnichannel for Customer Service interface. It's titled 'Sandbox'. The main dashboard has sections for 'My work items', 'Open work items', and 'Closed work items'. Under 'My work items', there are two entries: 'Default messaging queue - Kelsey Bloomquist - Live chat workstream' and 'Wrap-up'. The second entry has a timestamp '12/4/2020 6:56 AM'. A progress bar at the bottom indicates 'Connecting to Omnichannel for Customer Service ... - 63% - Preparing to receive notifications'.

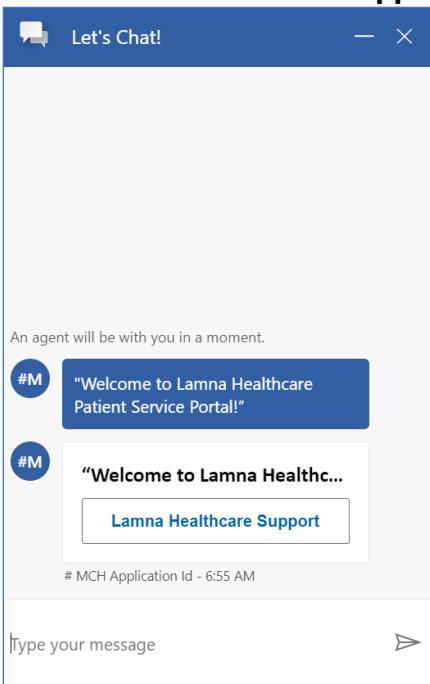
- If you don't see the splash screen and the presence indicator is grayed out, escalation into the app from the health bot won't work properly.
- Refresh again or close and reopen Patient Service Center until the splash screen appears. You may need to close all other apps or close incognito altogether and sign back in.
- If you just assigned the Omnichannel agent role, it may take up to 15 minutes to apply and for the presence to show for your user.

26. Once your presence indicator is green, you are ready to accept patient escalations.

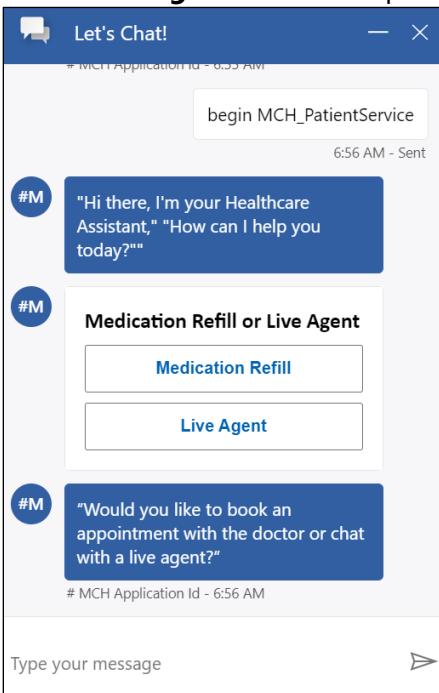
**Congratulations!** You have successfully logged in as both the patient and the live agent. Now it's time to start the Health Bot conversation.

## Task 2: Patient Escalates through Healthcare Bot

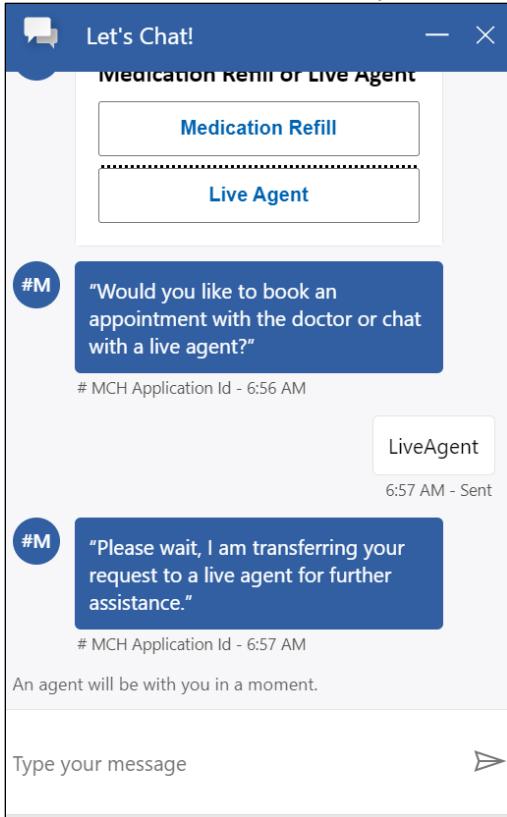
1. Select the **Let's Chat** Health Bot chat widget in the bottom right corner of the portal.
2. The Health Bot should go through the same conversation you created in Lab 04.
  - a. Make sure you set the Welcome message in the Health Bot lab
  - b. If the welcome message doesn't show, check the settings you did in Lab 04 (Teams and Human handoff enabled). Also make sure you added the widget snippet to the Patient Healthcare chat widget.
3. Select **Lamna Healthcare Support** to start a support conversation.



4. Select **Live Agent** in the next prompt to escalate to an agent.



5. You will see the chat notifies you -- **An agent will be with you in a moment.**



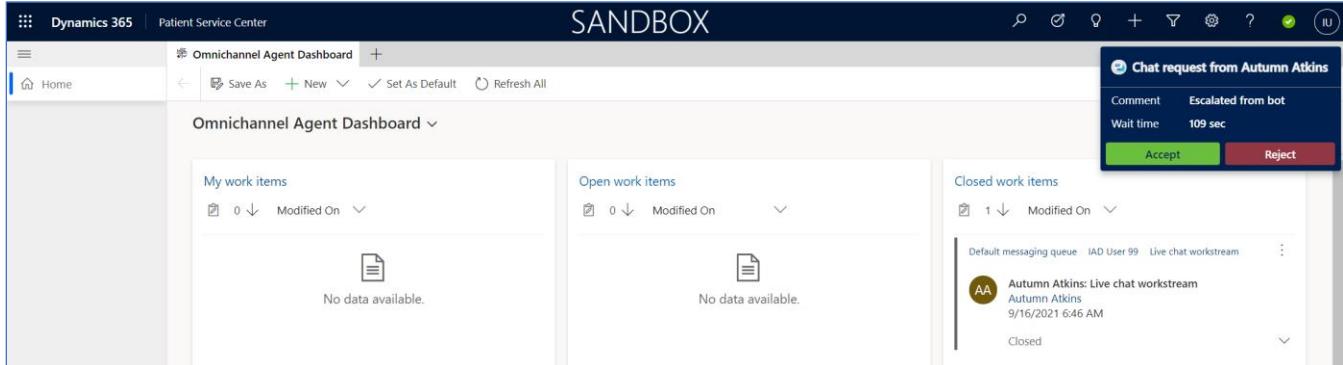
6. Now let's switch over to the **Patient Service Center** app so you can accept the escalation as an agent.

**Congratulations!** You have successfully configured and started a conversation with the Health Bot in the Healthcare Patient Portal and asked to escalate to an agent in Patient Service Center.

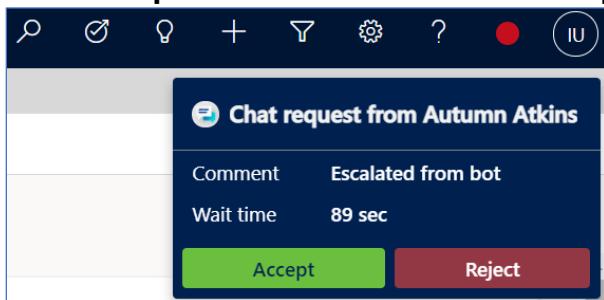
## Task 3: Agent Provides Personalized Care in Patient Service Center with the Productivity Pane

In this task, you will act as the Patient Service Center Agent, accept the escalation from the healthbot and assist the patient with their issue by using the productivity pane.

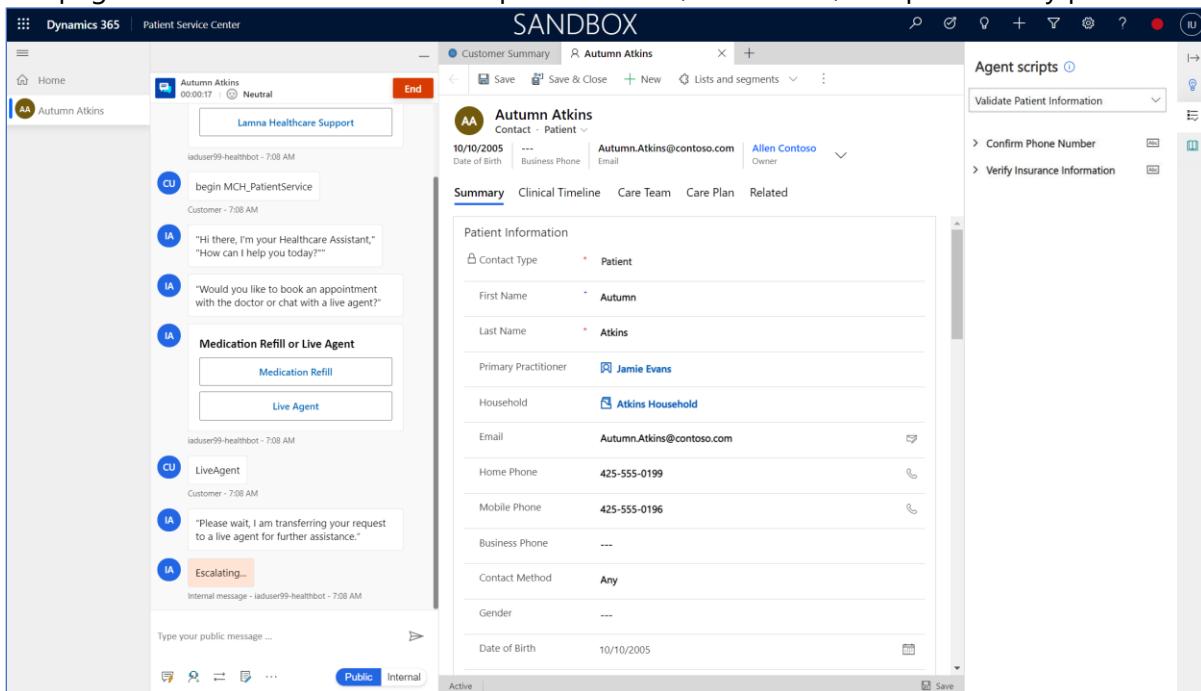
1. Navigate back to the **Patient Service Center** app. You should be signed in as your IAD User.
2. Notice in the upper right corner there is a **Chat request** from your user.



3. Select **Accept** to start a conversation with the patient.



4. The page should reload and show the patient record, active chat, and productivity pane as seen below.



5. See the chat directly embedded on the left-hand side. Try out the command bar below it to see various options such as **auto-replies** and **surveys**.
6. Navigate around and test out the **productivity pane**.
7. Go through the **agent script** and check off ones you complete asking the patient.
8. Go to **Knowledge Article** tab and **search** for "Breath" or "Inhaler". Notice your Knowledge Article appear.

**Congratulations!** You completed the full experience from logging in as a patient to the portal, conversing with the health bot, and escalating into Patient Service Center to navigate the features for the agent.

# Summary

**Nice work!** You have completed **Lab 05 – Patient Access & Service Center**.

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

- Configure and navigate the Patient Access Portal with the Healthcare template
- Configure Agent Scripts to show in the Productivity Pane
- Configure Knowledge Articles to show in the Productivity Pane
- Experience full escalation scenario between Patient, Health Bot, and Live Agent to show the various tools lit up in Patient Service Center during a conversation.