

Microsoft Cloud for Healthcare **in a Day**

Lab 05: Patient Access Portal & Patient Service Center

Step-by-Step Lab

April 2021

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Overview

Lab Prerequisites

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

This is the **fifth** lab in a series covering the Microsoft Cloud for Healthcare. The assumption is you have successfully reviewed the preliminary presentations and have completed environment setup. You must also **complete “Lab 04: Virtual Healthbot”** as this lab will build off the previous one.

If you have not completed the environment setup, please reference the following two links:

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

This lab also uses the following additional installed application(s):

- [Dynamics 365 Productivity Tools](#)

Before you Begin

Note: If you’re in an official training the user credentials and environment name have been provided to you.

1. You must be connected to the internet.
2. Open the browser in In-Private or Incognito mode.
3. Navigate to [Power Apps](#) and sign-in with the user credentials.
4. Select the correct environment from the upper right **Environment** drop down.



Solution Center

This lab focuses on the **Patient Access** and **Patient Service Center** healthcare solutions installed from Solution Center.

Healthcare solutions for provider

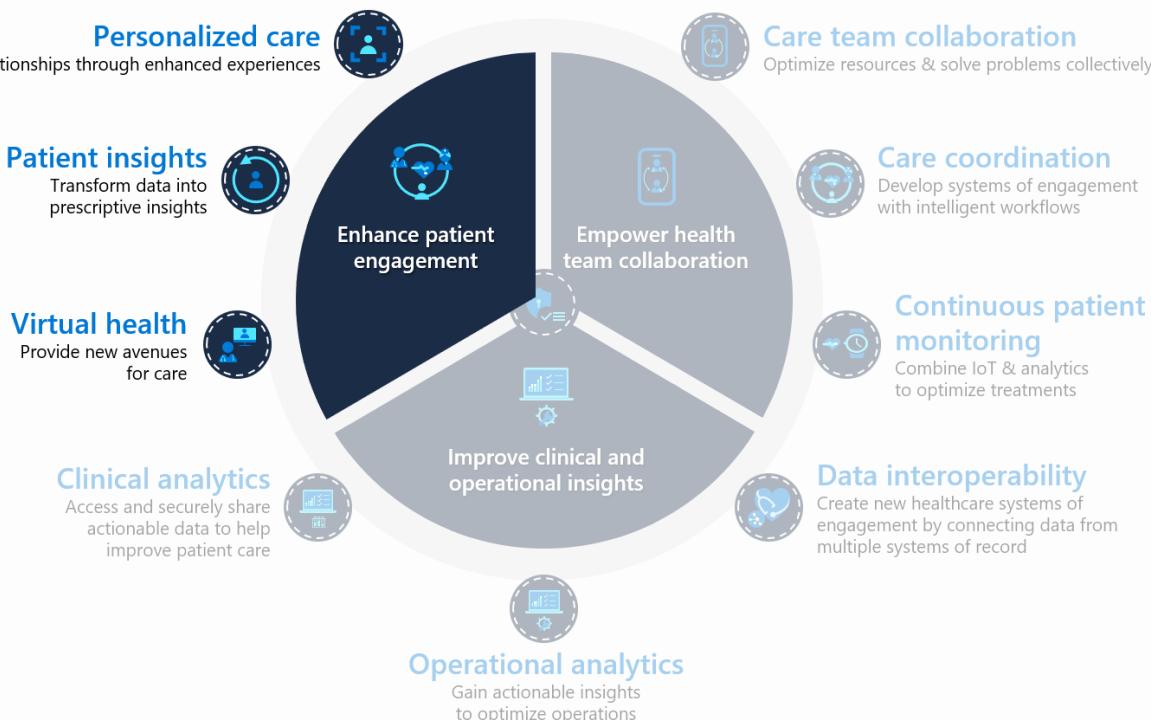
Healthcare Solutions for provider empower providers to personalize patient experiences and deliver seamless care management through patient insights and health team collaboration. These solutions include the FHIR-based patient data model providing a standardized data structure for consistency across applications and seamless integration to 3rd party EMR and EHR systems. For more information click [here](#).

Add all healthcare solutions for provider

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

Industry Prioritized Scenarios

The Azure Health Bot focuses on the **Enhance patient engagement** priority scenario by creating a virtual health option to allow for new avenues of care with embedded insights.



Recommended Resources

The following resources provide a full understanding of the Microsoft Cloud for Healthcare and its components and are helpful general resources:

- [Microsoft Cloud for Healthcare](#)
- [Microsoft Cloud for Healthcare Documentation](#)

The following additional resources reference the areas taught throughout the lab:

- [Power Apps Portals admin center](#)
- [Set up and configure a Patient Access portal](#)
- [Patient Access: Provide access for personalized care](#)
- [Productivity pane overview](#)
- [Guide agents with scripts](#)
- [Create and manage knowledge articles](#)
- [Review and reject or approve a knowledge article](#)
- [Configure automatic chats using Microsoft Health Bot](#)
- [Enable a bot to escalate and end conversation](#)

Lab Goals

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



- Configure and navigate the Patient Portal
- Configure an escalation from the Healthbot in the Patient Portal to a human agent in the Patient Service Center application
- Create an Agent Script and Knowledge Article
- Enable Smart Assist in Patient Service Center



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

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 that was installed in your environment by the Patient Access module in Solution Center when the 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 to expect after configuring your external website and signing into the Healthcare Patient Portal:

The screenshot shows the 'Welcome Reed Flores' page of the Contoso Healthcare Patient Access Portal. The left sidebar contains navigation 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 search bar. The main content area features three large cards: 'Schedule an appointment' (with a video of a child at a computer), 'View messages' (with a woman on a phone), and 'Find a doctor' (with a doctor). Below these are sections for 'Unread messages' (empty), 'Medications' (empty), 'Upcoming appointments' (empty), and a 'Let's Chat!' button.

If you'd like to learn more about portals, check out the following: [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.

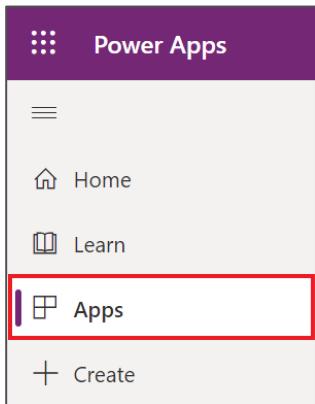
Now, Lamna Healthcare wants to associate the previous Customer Self-Service portal with the **Healthcare Patient Portal** template, so the correct website is displayed to the user. The following steps will guide you through how to bind your website to the proper template and restart the portal for changes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

You may remember the Customer Self-Service template from Lab 04: Azure Health Bot, where you embedded the Health Bot in the Lamana Healthcare Patient Portal and tested the conversation and escalation. 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. Navigate to [Power Apps](#) (recommend Incognito or InPrivate session).
2. Log in using the credentials supplied in the training for your user.
3. Select the correct environment from the upper right **Environment** drop down.



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



5. 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.

Name	Modified	Owner	Type
Lamna Healthcare Patient Portal	3 d ago	SYSTEM	Portal
Portal Management	3 d ago		Model-driven

6. Select **More Commands (...)** > **Browse**. This will open the Healthcare Patient Portal. You may also select the app name or click Browse on the top command bar to open it.

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, Data, Flows, Chatbots, AI Builder, and Solutions. The main area is titled 'Apps' and shows a list of apps. One app, 'Lamna Healthcare Patient Portal', is selected and highlighted with a red box. A context menu is open next to it, listing options: Edit, Browse (which is also highlighted with a red box), Share, Settings, Delete, and Details. There are also two status messages at the top: 'Your trial portal app will expire in 26 days. To keep it, convert it to production.' and '6 environment variables need to be updated. See environment variables'.

7. You should see the **Customer Self-Service** template in the **Lamna Healthcare Patient Portal**.

The screenshot shows the 'Lamna Healthcare Patient Portal' website. At the top, there's a header with the text 'Contoso, Ltd.' and links for Knowledge Base, Forums, My Support, and Sign in. Below the header is a large banner with the text 'CONTOSO CUSTOMER SELF-SERVICE'. Underneath the banner is a search bar with 'All' and 'Search' buttons. The main content area has a section titled 'Most Popular' with three categories: 'Most Popular Articles', 'Most Recent Articles', and 'Top Rated Articles'. At the bottom of the page, there's a section titled 'Forums'.

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

9. Return to the **Power Apps** screen in the **Apps** section.
10. Select the **Lamna Healthcare Patient Portal** app if it isn't already selected.
11. Select **More Commands (...)** > **Settings**. This will pop out the **Portal settings** panel on the right.

Name	Modified
Lamna Healthcare Patient Portal	2 d ago
Patient Outreach	
Care Management	
Healthcare Administration	
FHIR Sync Agent Administration	
Home Health	

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

Portal settings

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 ↗](#)

13. This will open a new tab, the **Power Apps Portals admin center**, where you can do portal administrative tasks.
14. The page should open in the **Portal Details** tab of the Power Apps Portals admin center.

The screenshot shows the 'Power Apps Portals admin center' interface. On the left, a sidebar menu is visible with the following items:

- Portal Details** (selected, highlighted with a red border)
- 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

The main content area is titled 'Portal Details' and contains the following configuration fields:

- General Settings**
 - Name: Lamna Healthcare Patient Portal
 - Type: Trial (marked with a red asterisk)
 - A yellow callout message: ⓘ Your trial portal will expire in 27 day(s). Convert your portal to production to avoid its suspension. [Learn more](#)
- Convert** button
- Application ID**: 8ae63a08-cba9-463a-bdb7-1d28a4fc2c4f
- Owner**: (empty field)
- Portal URL**
 - Base Portal URL: <https://healthcarepatient.powerappsportals.com>
- Portal Audience**
 - Portal Audience: Customer (marked with a red asterisk)
- Update Portal Binding**
 - Select Website Record: Customer Self-Service (marked with a red asterisk)

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

The screenshot shows the 'Update Portal Binding' section of the 'Portal URL' configuration page. A red box highlights the 'Select Website Record' dropdown field.

Portal URL

Base Portal URL:
<https://healthcarepatient.powerappsportals.com>

Portal Audience

Portal Audience: Customer

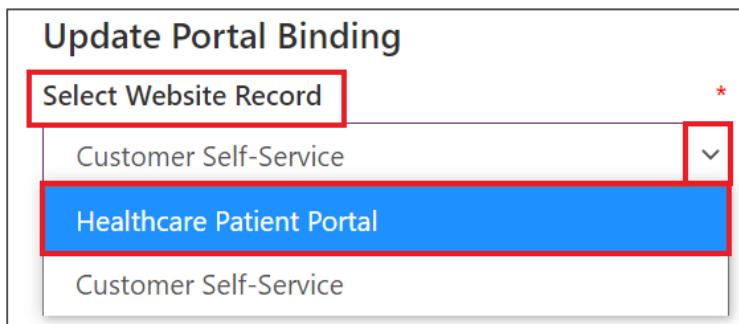
Update Portal Binding

Select Website Record: Customer Self-Service (highlighted with a red border)

Change Portal State

Portal State: On

16. 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.



17. 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

18. Select **Portal Actions** on the left navigation > **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 30 day(s). Convert your portal to production to avoid its suspension. [Learn more](#) [Convert](#)

Restart
Restart this portal.

Update Dynamics 365 URL
Update your Dynamics 365 URL if it has changed after provisioning.

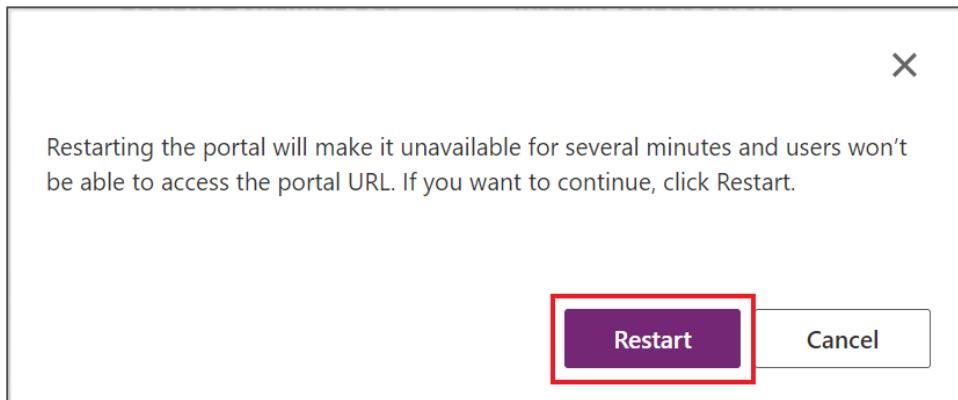
Install Project Service Automation extension
Install the Project Service Automation extension for Partner portals

Install Field Service extension
Install the Field Service extension for Partner portals

Get Public Key
Click to get the public key of the Portal.

Get latest metadata translations
Click to get latest metadata translations

19. When prompted, confirm the **Restart** for the portal.

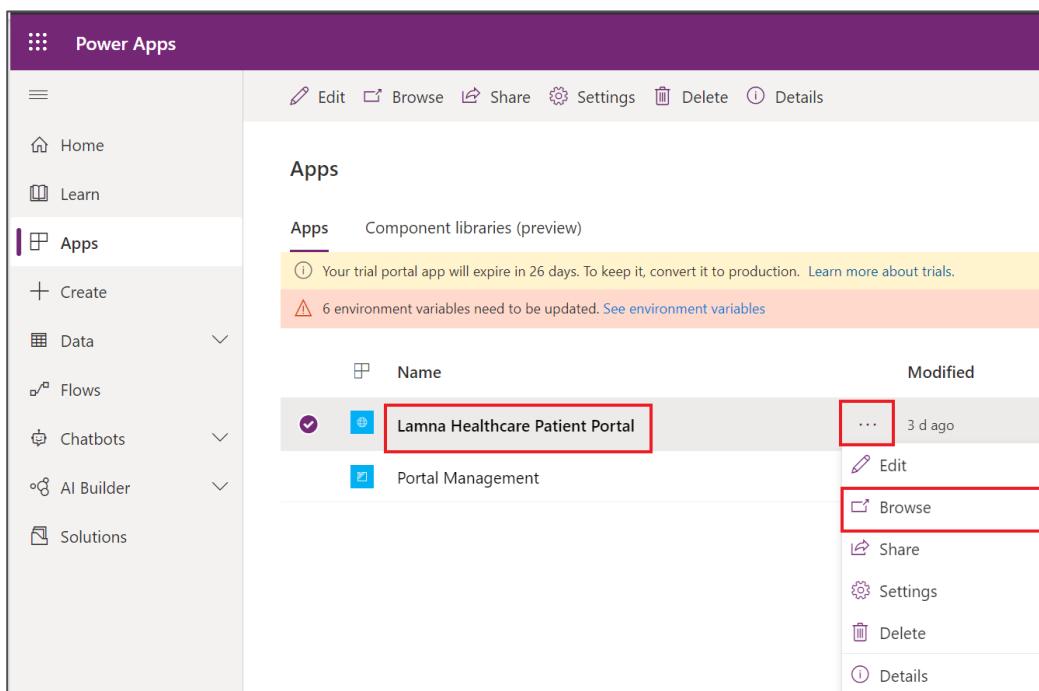


20. Wait 1-5 minutes for the portal to restart. (Feel free to refill your water or stretch those legs!)

a. You may also jump ahead to [Task 2](#), as we will open the portal later in the exercise.

21. Navigate back to the Lamna Healthcare Patient Portal

- Navigate to the [Power Apps](#).
- Select **Apps** > **Lamna Healthcare Patient Portal** app.
- Open the app by selecting the app name or clicking **Browse**.



Name	Modified
Lamna Healthcare Patient Portal	3 d ago
Portal Management	

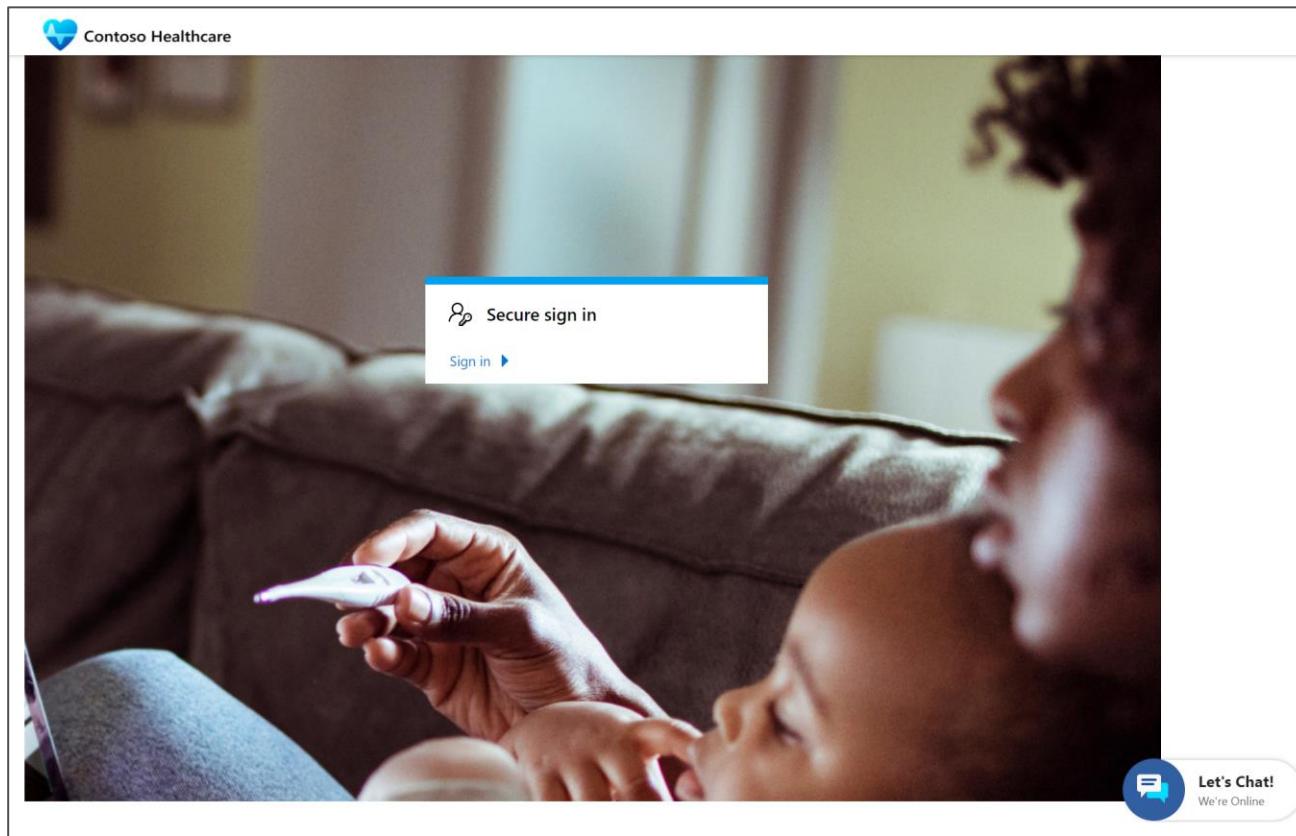
22. If you see the following error, the portal is still restarting.



Service Unavailable

HTTP Error 503. The service is unavailable.

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



Congratulations! You completed the post deployment steps to configure the Patient Access Portal. After updating the bindings and restarting the portal, the website should now show 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 invite a patient to create an account and sign in.

In this task, you will learn how to **create an invitation code** for a patient to sign up and use the Lamna Healthcare Patient Portal.

1. Open the Healthcare Administration app.
 - a. Navigate to the [Power Apps](#).
 - b. Select **Apps > Healthcare Administration** app.
 - c. Select **More Commands (...) > Play** (or select the app name).

A screenshot of the Microsoft Power Apps interface. On the left, there is a sidebar with options: Learn, Apps (which is selected and highlighted in purple), Create, Data, Flows, Chatbots, AI Builder, and Solutions. The main area is titled "Apps Component libraries (preview)" and shows a list of apps. There is a warning message: "⚠️ 6 environment variables need to be updated. See environment variables". Below this, there is a table with columns "Name" and "Actions". The table contains four rows: "Lamna Healthcare Patient Portal" (with a play icon), "Patient Outreach" (with a play icon), "Care Management" (with a play icon), and "Healthcare Administration" (with a play icon). The "Healthcare Administration" row is highlighted with a red rectangle around its "Actions" column.

2. Open an existing Patient record.

- Select **People** on the left navigation bar if not already selected.
- Open an existing record from the **Active Patients** view. Using an existing record will ensure additional healthcare data is associated with the patient to view in the portal.

The screenshot shows the Dynamics 365 Healthcare Administration interface. The left sidebar has a 'People' option highlighted with a red box. The main area displays a table titled 'Active Patients' with four rows of patient data:

	Full Name	Gender	Birthday	Medical Record Number	Emergency Contact Name
Amber Rodriqu...	Male	11/15/1965	MRN2631-2120	Kai Carter	
Casey Jensen	Female	8/18/2004	MRN1156-6243	Morgan Connors	
Elizabeth Moore	Female	1/29/2001	MRN4278-7517	Kai Carter	
Jessie Irwin	Male	7/1/2014	MRN6734-1484	Kendall Collins	

3. Create an invitation for the Patient.

- You should be on the patient form you opened.
- Select **Create Invitation** from the top command bar. It should be near the right side.

The screenshot shows the patient form for 'Elizabeth Moore'. The top toolbar includes a 'Create Invitation' button highlighted with a red box. The patient details shown are:

- EM (Profile icon)
- Elizabeth Moore**
- Contact · Patient
- MRN4278-7517 (Medical Record Number)
- 555-555-0100 (Mobile Phone)
- Elizabeth.Moore@contoso.com (Email)

Note: You may have to expand additional options to see this command in the drop down as shown below.

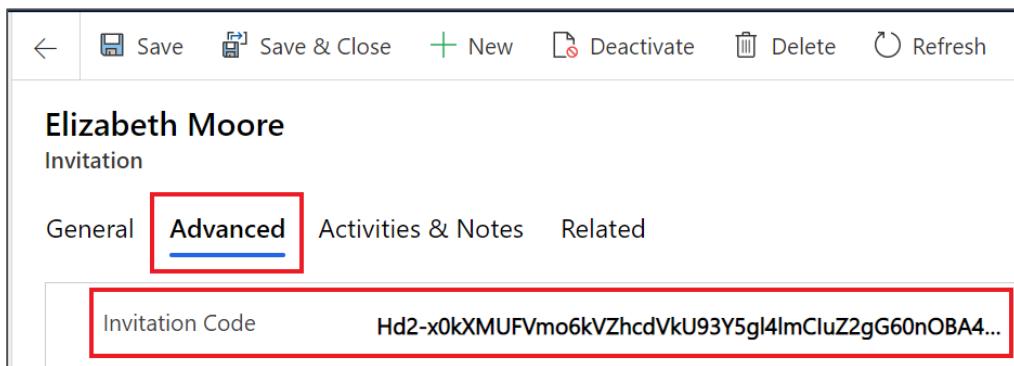
The screenshot shows the patient form for 'Elizabeth Moore' with expanded options in the top toolbar. The 'Create Invitation' button is highlighted with a red box. Other visible options include 'Change Password' and 'Refresh'.

- A New Invitation form will appear. You don't need to make any changes. Click **Save**.

The screenshot shows the 'New Invitation' form. The top toolbar has a 'Save' button highlighted with a red box. The form contains the following fields:

- General** tab selected
- Name: * Elizabeth Moore
- Type: * Single
- Owner/Sender: * IAD User 29
- Invited Patient: Elizabeth Moore

4. Once saved, an invitation code will be created for the patient. Let's go retrieve it.
 - a. Go to the **Advanced** tab on the Invitation record.
 - b. Copy and store the **Invitation Code** for accessing the Patient Portal in the next task.

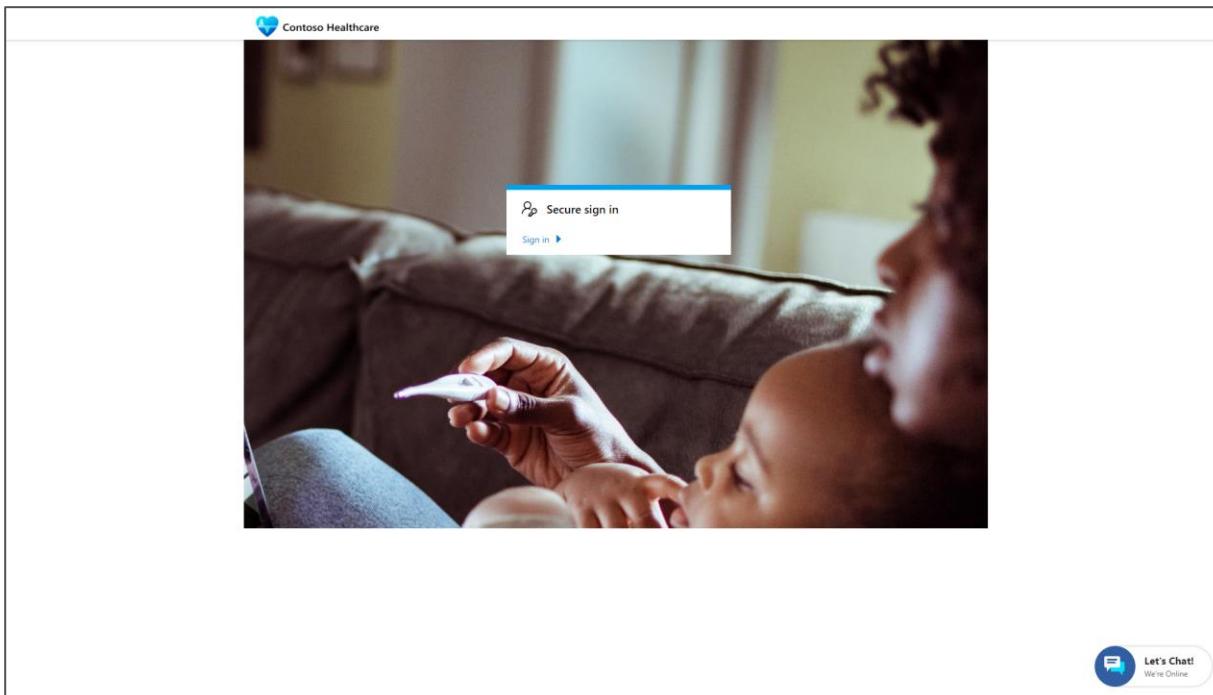


Congratulations! You have successfully created an invitation code for a patient to register an account in the Patient Portal.

Task 3: Redeem Invitation Code and Sign into Patient Portal

In this task, you will transition **personas** and act as a **patient**, who just received an invitation to Lamna Healthcare's Patient Portal and is excited to register and navigate its features.

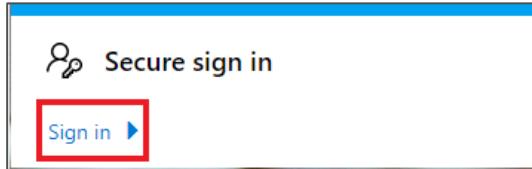
1. Open the Lamna Healthcare Patient Portal.
 - a. Navigate to the [Power Apps](#).
 - b. Select **Apps > Lamna Healthcare Patient Portal** app.
 - c. Open the app by selecting the app name or clicking **Browse**.
2. Your Patient Portal should open and look like the following:



3. If you still see the Customer Self-Service template, make sure you've completed [Exercise 1, Task 1](#).

4. Redeem the invitation to sign into the Patient Portal.

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



- Select the **Redeem invitation** tab.
- Paste your **Invitation code** you stored a few steps ago.
- Click **Register**.

A screenshot of the Contoso Healthcare Patient Portal. At the top, there's a navigation bar with "Sign in", "Register", and "Redeem invitation" buttons. The "Redeem invitation" button is highlighted with a red box. Below it, there's a section titled "Sign up with an invitation code". It has an input field for "* Invitation code" containing a long string of characters, which is also highlighted with a red box. There's a checkbox for "I have an existing account" and a blue "Register" button at the bottom, which is also highlighted with a red box.

5. Register for a new local account.

- Email** should **auto-fill** from your contact. If not, create a dummy email.
- Create a **Username** for the Patient (recommend using parts of patient name)
- Create a **Password** to sign into the Patient Portal (something you will remember because you will sign in again this later in the lab!)
- Click **Register**.

A screenshot of a "Register for a new local account" form. It has four input fields: "* Email" with the value "Elizabeth.Moore@contoso.com", "* Username" with the value "EMoore", "* Password" with the value ".....", and "* Confirm password" with the value ".....". All these input fields are highlighted with red boxes. Below them is a blue "Register" button, which is also highlighted with a red box.

6. After selecting Register, you should be signed into the Patient Portal. Now you will learn to navigate its features in the following task.

Congratulations! You have successfully redeemed the invitation to register an account and signed in.

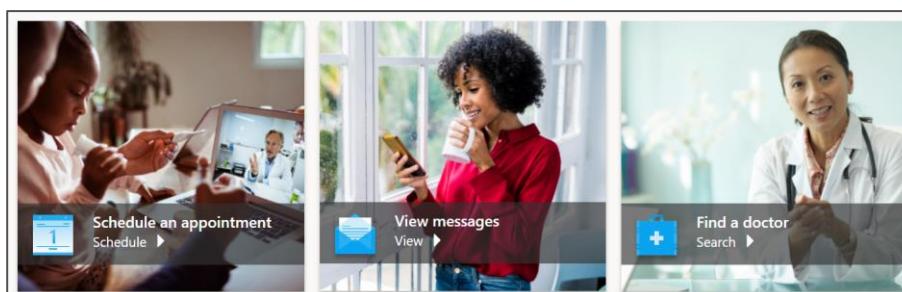
Task 4: Navigate the Patient Access Portal

In this task, you will continue as the **patient persona** and navigate the Patient Portal.

- After registering for an account in the **Patient Access Portal**, you should be welcomed by the portal Homepage.

Note: In some cases, you might be directed to the patient profile upon sign in. Select the Contoso Healthcare company in the upper left at any time to go back to the Homepage.

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

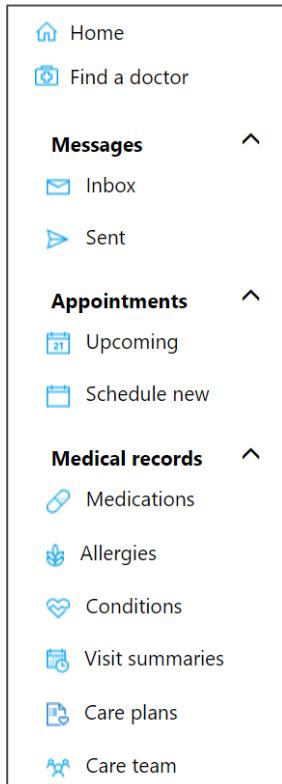


3. You will also see current patient information including **unread messages**, **upcoming appointments**, and **current medications**.

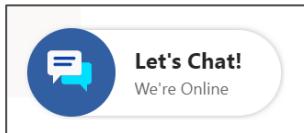
Unread messages			Medications			
From	Subject	Received	Medication	Ordered by	Date started	Refills
Abigail Jackson	Smoking Cessation seminar	12/17/2020 4:35 AM	Nighttime for Kids Relief	Jamie Evans	10/31/2020 5:36 PM	1
Jasmine Miller	Please view Test Results	12/17/2020 4:35 AM	Hydrocarbon Fli 50G	Jamie Evans	10/31/2020 5:34 PM	1

Upcoming appointments		
Date ↑	Provider	Location
1/30/2021 6:14 AM		
2/14/2021 3:38 AM		
2/14/2021 4:06 AM		

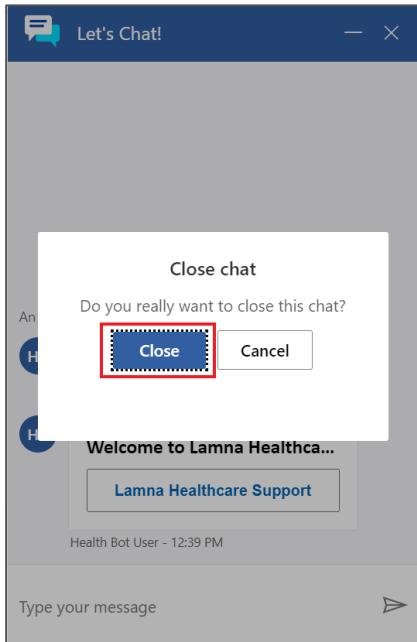
4. In the left navigation bar, you will see all available options. Below is the list of the available options. In bonus tasks, we go into further detail to navigate the different options and see their functionality.
- Home** command will direct you back to the homepage.
 - Find a doctor** shows a list of practitioners with associated city and state information.
 - Messages** allows a secure method to send and receive messages to healthcare professionals.
 - You can expand Messages on the navigation bar to see both the **Inbox** and **Sent** messages.
 - Expand **Appointments** to check **upcoming** and **schedule new** appointments.
 - Check **Medical records** including **medications**, **allergies**, **conditions**, **visit summaries**, **care plans**, and **care team**.



5. You may start a conversation with the Health bot by clicking **Let's Chat** button found in the lower right-hand corner of the screen to open the virtual assistant.



6. This will open the Health Bot and start the conversation you created in Lab 04. We will have a full conversation with the bot in the final exercise, but for now we will close the Bot.



7. You may also access the patient Profile page by selecting the patient's name in the upper right drop down and selecting **Profile**.



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

Your Information

First Name *

Last Name *

Home Phone 2

E-mail

Home Phone

How may we contact you? Select all that apply.

Email
 Fax
 Phone
 Mail

Update

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



10. You should be redirected to the sign in page.

Sign in with a local account

* Username

* Password

Remember me?

Sign in **Forgot your password?**

Sign in with an external account

Azure AD

Sign in **Register** **Redeem invitation**

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 a patient to register to the website, and navigated the portal once it's been deployed through the Microsoft Cloud for Healthcare.

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.

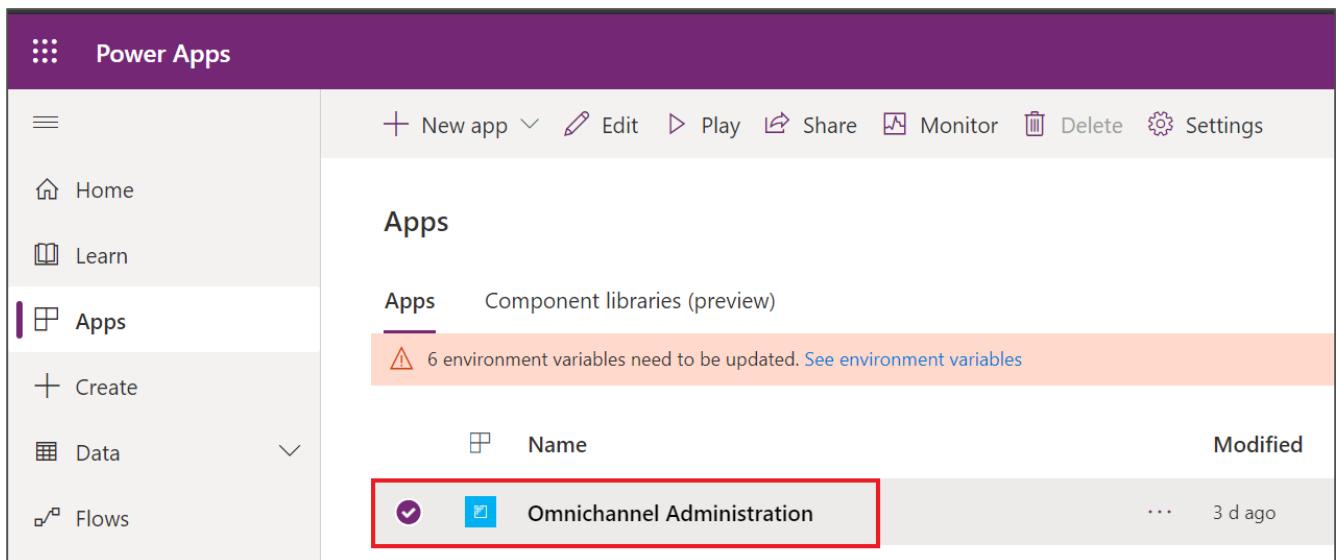
The screenshot displays the Microsoft Healthspace Patient Service Center. On the left, the main workspace shows a chat history with a healthcare bot and a live agent. The right side shows a 'Customer Summary' for 'Elizabeth Moore' with details like MRN4278-7517, contact info (555-555-0100, Email: Elizabeth.Moore@contoso.com), and owner (Kelsey Bloomquist). A red box highlights the 'Agent scripts' section in the productivity pane on the right, which lists 'Validate Patient Information' with two steps: 'Confirm Phone Number' and 'Verify Insurance Information'.

Task 1: Assign Productivity Tools Administrator Role

In this task, you will assign the necessary role to your user to create and use agent scripts. Specifically, you will be adding the **Productivity tools administrator** role. 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.

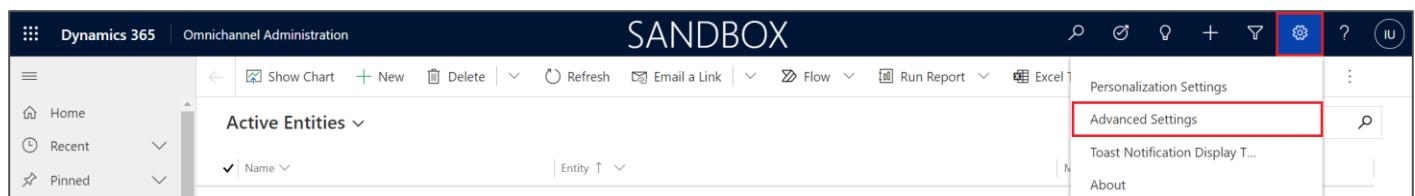
See the following documentation to learn more about these roles: [Assign roles and enable users for Omnichannel for Customer Service](#)

1. Open the Omnichannel Administration app.
 - a. Navigate to the [Power Apps](#).
 - b. Select **Apps > Omnichannel Administration** app.
 - c. Select **More Commands (...) > Play** (or click the app name).



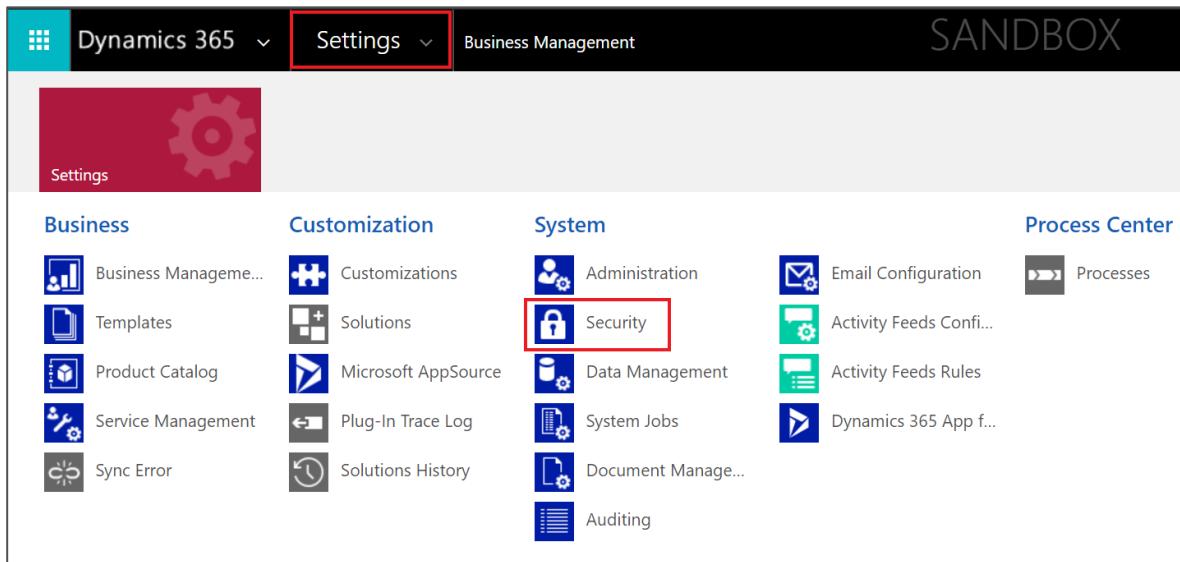
The screenshot shows the Power Apps interface. On the left, there's a sidebar with options like Home, Learn, Apps (which is selected), Create, Data, and Flows. The main area is titled 'Apps' and shows a list of apps. One app, 'Omnichannel Administration', is highlighted with a red box. The list includes columns for Name and Modified. A message at the top right says '6 environment variables need to be updated. See environment variables'.

2. Select the gear in the upper right corner and navigate to **Settings > Advanced Settings**.



The screenshot shows the Dynamics 365 interface with the title 'Sandbox'. In the top right, there's a gear icon which opens a dropdown menu. The 'Advanced Settings' option is highlighted with a red box in this menu.

3. A new tab should open and navigate to Dynamics 365.
4. In **Dynamics 365**, select **Settings > Security**.



5. Select Users.

The screenshot shows the Dynamics 365 Security page. At the top, it says 'Dynamics 365 for Outlook Deprecated' with a note that it's retired as of Oct. 1, 2020. The main heading is 'Security'. Below it, a section asks 'Which feature would you like to work with?'. It lists several options: 'Users' (highlighted with a red box), 'Security Roles', 'Field Security Profiles', 'Positions', 'Teams', 'Business Units', 'Hierarchy Security', and 'Access Team Templates'. Each option has a small icon and a brief description.

6. Select Enabled Users for the grid view so that your user will show in the list.

The screenshot shows the Dynamics 365 'Enabled Users' grid view. At the top, there are buttons for 'NEW', 'PROMOTE TO ADMIN', and 'EMAIL A LINK'. Below this is a dropdown menu with 'Enabled Users' highlighted with a red box. The main grid displays a list of users with columns for 'Full Name' and a checkbox. The users listed are '# AriaPrdMdlExporterFpa', '# BizQA', '# CCADataAnalyticsML', '# CDSFileStorage', and '# CDSReportService'.

7. Scroll down to find your user or search for IAD User in the Search bar.

The screenshot shows the Dynamics 365 interface with the search bar containing 'IAD User'. The results table lists five users: IAD User 01 through IAD User 05, all associated with the business unit 'healthcareinaday' and primary email addresses starting with 'IADUser'. A red box highlights the search term in the search bar.

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

The screenshot shows the Dynamics 365 interface with the search bar containing 'IAD User'. The results table has 'IAD User 01' selected, indicated by a checked checkbox in the first column. The top navigation bar shows the 'MANAGE ROLES' button highlighted with a red box. A red box also highlights the search term in the search bar.

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

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

The screenshot shows the 'Manage User Roles' dialog box. It asks 'What roles would you like to apply to the 1 User you have selected?'. The table lists roles under 'Role Name' and 'Business Unit'. Two roles are selected: 'Productivity tools administrator' and 'Productivity tools user', both of which are highlighted with a red box. The 'OK' button at the bottom is also highlighted with a red box.

Role Name	Business Unit
<input type="checkbox"/> Playbook Manager	healthcareinaday
<input type="checkbox"/> Playbook User	healthcareinaday
<input checked="" type="checkbox"/> Productivity tools administrator	healthcareinaday
<input checked="" type="checkbox"/> Productivity tools user	healthcareinaday
<input type="checkbox"/> Project Owner	healthcareinaday
<input type="checkbox"/> Relationship Insights Admin	healthcareinaday

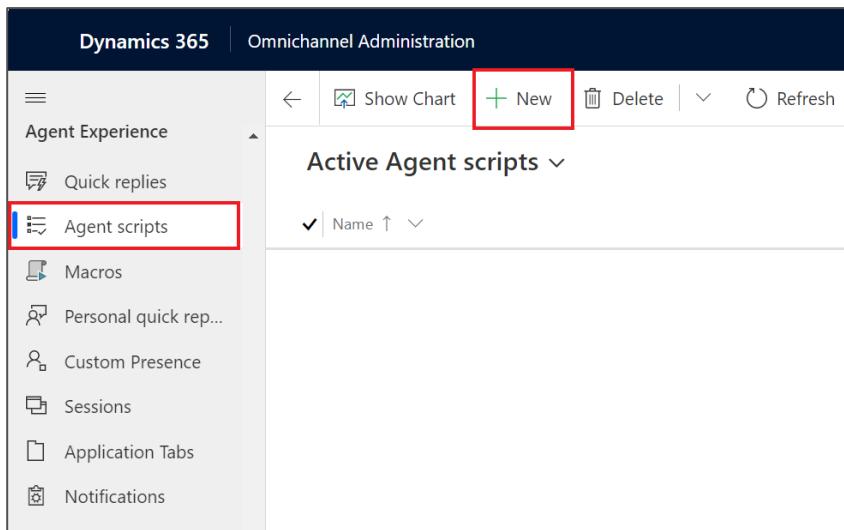
Note: You will assign more roles again in this lab. It's recommended to leave the User screen open.

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

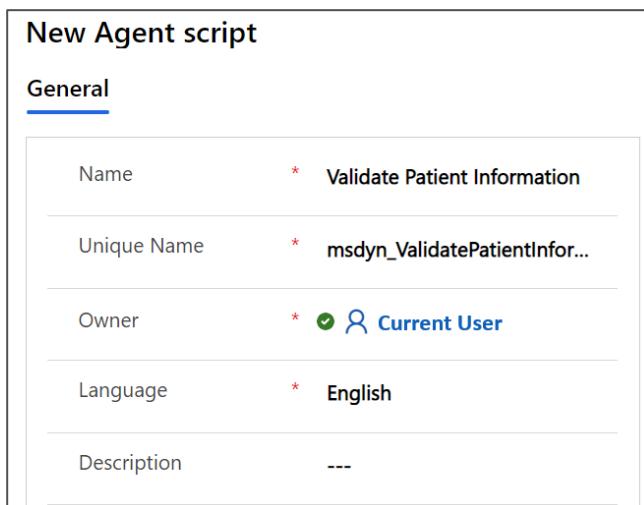
Task 2: Create an Agent Script

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 back to **Omnichannel Administration** application which you previously opened.
2. In the left navigation bar, under **Agent Experience**, select **Agent Scripts**.
 - a. If you don't see Agent Scripts, make sure you completed Task 1 and assigned roles.
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



General	
Name	* Validate Patient Information
Unique Name	* msdyn_ValidatePatientInformation
Owner	* <input checked="" type="checkbox"/> Current User
Language	* English
Description	---

5. Select **Save**. The **Agent script steps** appear.
6. In the **Agent script steps** section, select **+New Agent script step**.

Agent script steps

No data available.

7. **Quick Create: Agent script steps** appears. Specify the following:

- Name:** Confirm Phone Number
- Unique Name:** msdyn_ConfirmPhone
- Order:** 1
- Action type:** Text
- Text instructions:** Ask patient to confirm phone number.

Quick Create: Agent script step	
Name	* Confirm Phone Number
Unique Name	* msdyn_ConfirmPhoneNumber
Owner	* Current User
Agent script	Validate Patient Information
Order	* 1
Action type	* Text
Text instructions	* Ask patient to confirm phone number.

8. Select **Save and Close**. Now we will add another step.

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

Agent script steps

Name	Action type	Modified On
Confirm Phone Number	1 Text	12/1/2020 2:39 PM

10. Another **Quick Create: Agent script steps** appears. Specify the following:

- Name:** Verify Insurance Information
- Unique Name:** msdyn_VerifyInsuranceInformation
- Order:** 2
- Action type:** Text
- 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	* Current User
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			
<input checked="" type="checkbox"/> Name	Order ↑ ↓	Action type	Modified On
Confirm Phone Number	1	Text	12/1/2020 2:39 PM
Verify Insurance Information	2	Text	12/1/2020 2:47 PM

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

Validate Patient Information

Agent script

General Related

Name	* Validate Patient Information	Agent script steps	<input checked="" type="checkbox"/> Name	Order ↑ ↓	Action type	Modified On
Unique Name	* msdyn_ValidatePatientInfor...	Confirm Phone Number	1	Text	12/1/2020 2:39 PM	
Owner	* Current User	Verify Insurance Information	2	Text	12/1/2020 2:47 PM	
Language	* English					
Description	---					

Congratulations! You've 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**.

1. Open the Omnichannel Administration app if you aren't already in it.
 - a. Navigate to the [Power Apps](#).
 - b. Select **Apps > Omnichannel Administration** to open the app.
2. In the left navigation bar, under **Agent Experience**, select **Sessions**.
3. Select a session template from the list for which you want to associate the script. In this case we will select the **Chat session – default** template.

Name	Mode	Description
Case entity session - default template	Docked	---
Chat session - default	Docked	Customer Summary
Custom messaging session - default	Docked	Customer Summary
Entity records session - default	Hidden	Entity record
Facebook session - default	Docked	Customer Summary
LINE session - default	Docked	Customer Summary

4. Open the **Chat session – default** record.

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**.

The screenshot shows the 'Agent scripts' tab selected in the 'Chat session - default' page. The 'Agent scripts' tab is highlighted with a red box. To the right of the table, there is a button labeled 'Add Existing Agent scr...' which is also highlighted with a red box.

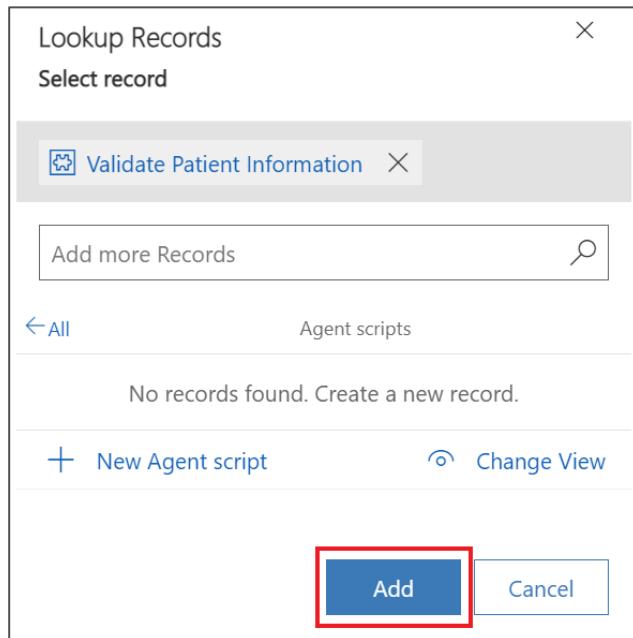
6. The **Lookup Records** pane appears.

The screenshot shows the 'Lookup Records' pane. It includes a search bar labeled 'Look for Records' with a magnifying glass icon. Below the search bar are sections for 'Recent records' and 'All records'. At the bottom are buttons for 'Validate Patient Information' and '+ New Record'.

7. In the **Look for Records** box, select the **search icon**. Select the **Validate Patient Information** agent script from the list.

The screenshot shows the 'Lookup Records' pane with a results list. One item, 'Validate Patient Information' dated 12/1/2020 2:24 PM, is highlighted with a red box. Other buttons like '+ New Agent script' and 'Change View' are visible at the bottom.

8. Select **Add**.



9. **Chat session – default** should now have the **Validate Patient Information** Agent script listed.

A screenshot of the 'Chat session - default' page. The 'Agent scripts' tab is selected. In the main area, there is a table with one row. The row contains the name 'Validate Patient Information' and the creation date '2/12/2021 3:36 PM'. There is also a 'Create On' column which is empty. At the top right of the table, there is a 'Add Existing Agent scr...' button.

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 as seen in the below screen or through user search.

The screenshot shows the Microsoft Power Platform Patient Service Center interface. On the left, there's a chat window with a healthcare bot named "Lamna Healthcare Support". The bot has sent messages like "Welcome to Lamna Healthcare Patie..." and "Hi there, I'm your Healthcare Assistant." On the right, there's a "Customer Summary" card for "Elizabeth Moore" with details like MRN4278-7517, phone numbers 555-555-0100 and 555-555-0100, and email Elizabeth.Moore@contoso.com. A "Smart assist" sidebar is open, showing "Knowledge article suggestions" and "Similar case suggestions", both of which are currently turned off. The sidebar also includes icons for "Public" and "Internal" switching, and a "Save" button at the bottom.

Task 1: Assign Knowledge Manager User Role

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

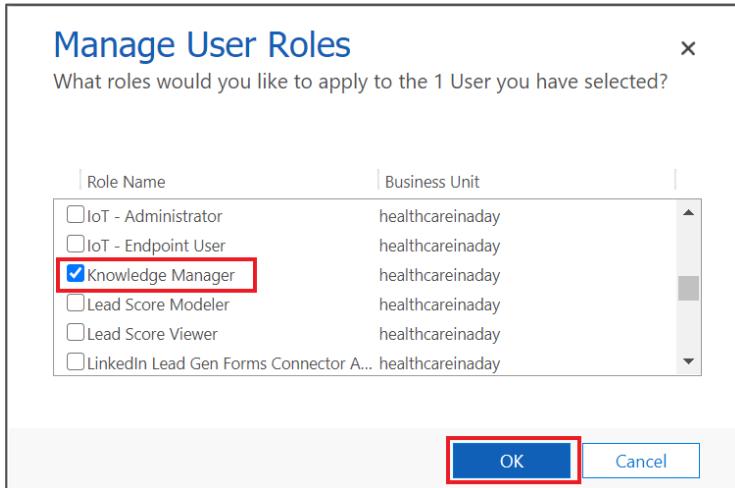
1. If you kept the User Settings page up from the previous exercise, navigate to that page.

The screenshot shows the Dynamics 365 Security page titled "Sandbox". The top navigation bar includes "Dynamics 365", "Settings", and "Security". Below the navigation, there are several buttons: "+ NEW", "EDIT", "APPROVE EMAIL", "REJECT EMAIL", "PROMOTE TO ADMIN", "MANAGE ROLES" (which is highlighted with a red box), "CHANGE BUSINESS UNIT", "CHANGE MANAGER", "CHANGE POSITION", and "***". A search bar at the top right contains the text "IAD User". The main area is a table titled "Search Results" with columns: "Full Name", "Position", "Main Phone", "Business Unit", "Site", "Title", and "Primary Email". There are five rows of data, each with a checkbox in the first column. The first row, "IAD User 01", has its checkbox selected and is highlighted with a red box. The table has a "Charts" icon on the far right.

2. If you didn't keep it open, follow all steps (except 9) in [Exercise 2, Task 1 – Assign Productivity User Roles](#) and then return here to assign the proper role.
3. Once you've selected your user and clicked **Manage Roles**, you must assign the necessary role(s).

- a. 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 and click **OK**.

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



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

Task 2: Set up Knowledge Management Settings

1. Open the Customer Service Hub Administration app.
 - a. Navigate to the [Power Apps](#).
 - b. Select **Apps > Customer Service Hub** app.
 - c. Select **More Commands (...)** > **Play** (or click the app name).

Name	Modified
Customer Service workspace	3 d ago
Customer Service Hub	1 wk ago

2. 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 Dynamics 365 Customer Service Hub interface. On the left, there is a site map with various categories like Customers, Service, Knowledge, Devices, and Service. Under the 'Service' category, 'Service Management' is highlighted with a red box and a red arrow pointing to it. Below the site map, a 'Service' button is also highlighted with a red box. The main area displays the 'Tier 1 Dashboard' with four sections: 'Active Cases' (listing several cases like 'Replacement Walker Needed', 'Request for Oxygen Tank Re...', etc.), 'My Resolved Cases' (empty), 'My Draft Emails' (empty), and 'My Activities' (empty). The top right corner shows a date range: 'This Quarter 10/1/2020 To 12/31/2020'.

3. In the site map on the left, scroll down and navigate to **Knowledge Base Management > Settings**.

The screenshot shows the 'Knowledge Base Management > Settings' page. The left site map highlights the 'Knowledge Base Management' section, which then leads to the 'Settings' page. The 'Settings' page contains several configuration sections: 'Embedded Knowledge Search', 'Record Types' (with a note to select record types for knowledge base management), 'Support Portal Connection' (with options for external portal integration), 'Knowledge Articles Feedback' (with a note to enable user feedback), and 'Knowledge Articles Inline Image' (with a note to enable inline image use). A blue 'Save' button is located at the bottom right of the page.

4. **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**.

Record Types

Select the record types for which you want to turn on knowledge base management.

Available

- 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

Selected

- Case
- Contact

>

>>

<<

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

Support Portal Connection

Select Yes to share Knowledge Articles as links.

Use an external portal. Select this option to send the ...

External links for KB articles are created in the URL format specified below

URL format ---

6. 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.

Knowledge Articles Feedback

Enable users to provide feedback on knowledge articles from search control.

Enable users to provide feedback on knowledge articles ...

Task 3: Create Knowledge Article

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**.

Change area

Service

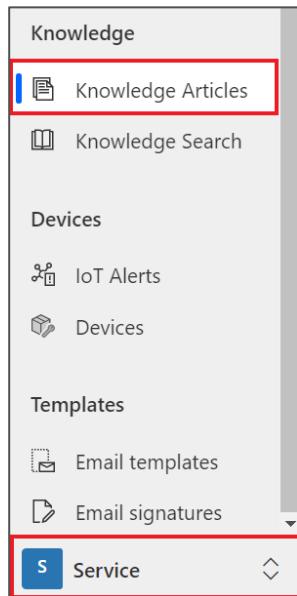
✓ Service Management

Scheduling

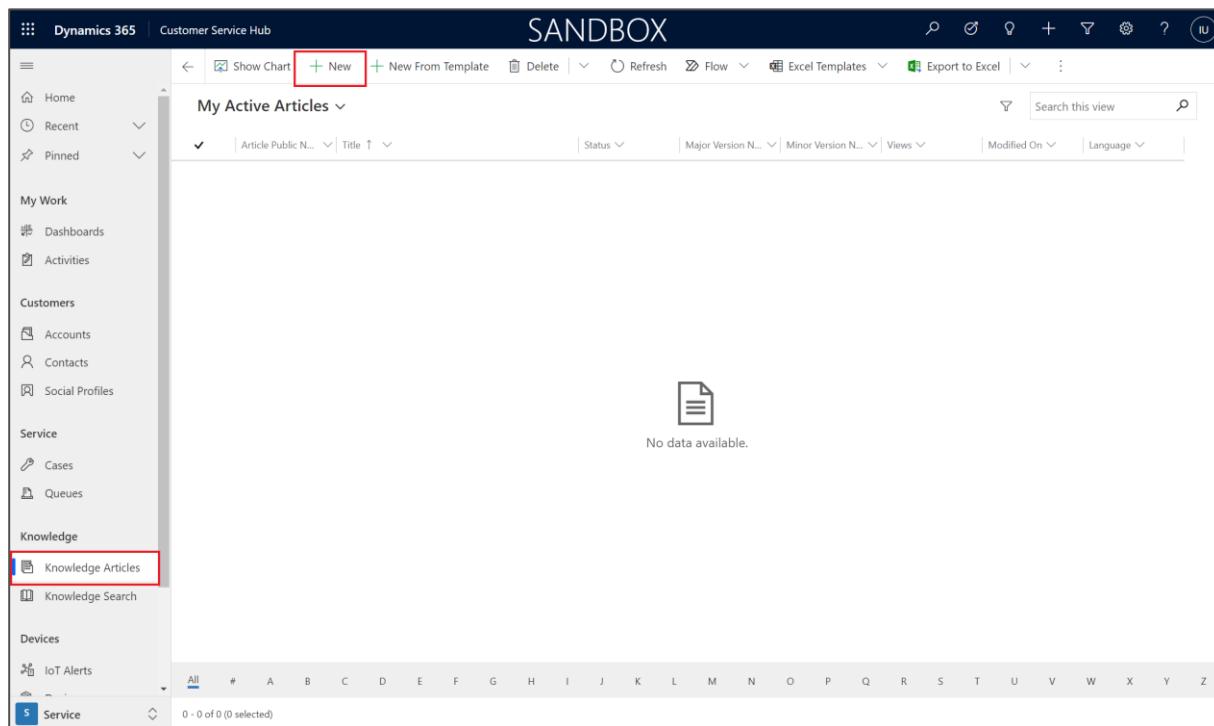
Help and Support

SM Service Managem... ▾

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



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



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

The screenshot shows the 'New Knowledge Article' interface. At the top, there's a red banner with 'New Process' and 'Active for less than one mi...'. Below it, tabs for 'Content', 'Summary', and 'Analytics' are visible, with 'Content' being the active tab. A progress bar at the top right shows 'Author (< 1 Min)' with a red circle icon, 'Review' with a grey circle icon, and 'Publish' with a grey circle icon. On the right, language settings show 'English - United States' and 'Proposed Status Reason'. The main area is titled 'ARTICLE CONTENT' and contains fields for 'Title' (with a red asterisk) and 'Keywords', both currently empty. There's also a 'Description' field which is partially visible.

5. On the **Article Content** section tab of the new knowledge article, specify the following details:
- Title:** Shortness of Breath
 - Keywords:** Asthma, shortness of breath, trouble breathing
 - Description:** Uncomfortable sensation or awareness of breathing or needing to breathe.

This screenshot shows the same 'New Knowledge Article' interface as before, but with the data filled in. The 'Content' tab is still active. The 'Title' field now contains 'Shortness of Breath'. The 'Keywords' field contains 'Asthma, shortness of breath, trouble breathing'. The 'Description' field contains the text 'Uncomfortable sensation or awareness of breathing or needing to breathe.' A red box highlights the entire 'ARTICLE CONTENT' section, and a red arrow points to the 'Description' field.

- 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:

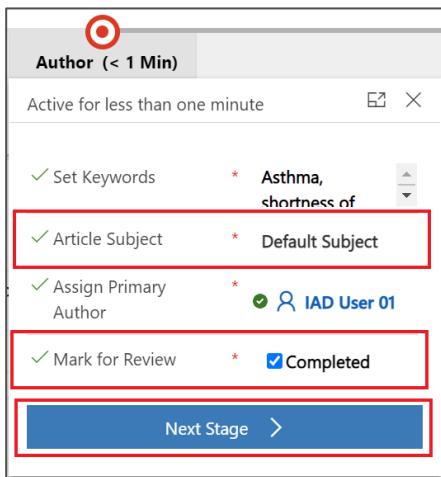
- Fever or a change in the amount, color, or thickness of sputum
- Breathlessness does not go away after resting for 30 minutes
- Swelling in the feet and ankles
- Trouble breathing when you lie flat
- High fever, chills, and cough
- Wheezing
- Worsening of pre-existing shortness of breath

6. Select **Save**.

The 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.

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** 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.

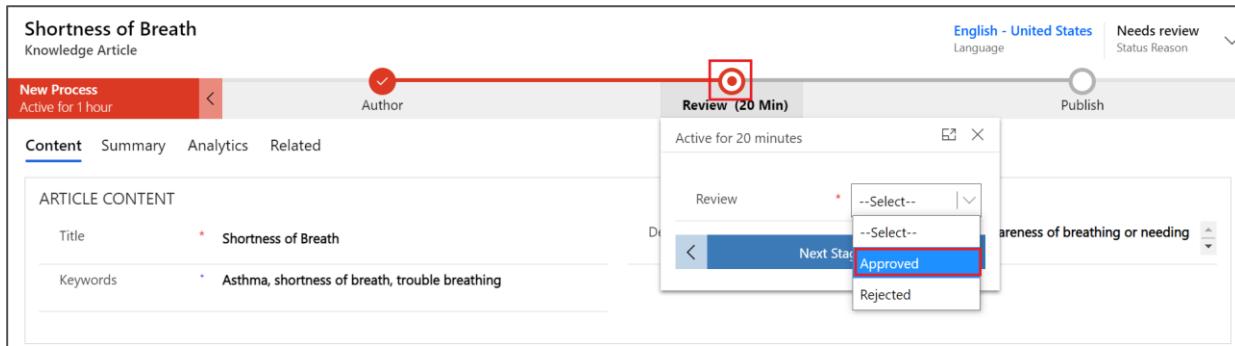
1. In Customer Service Hub, navigate to **Service > Dashboards** and use the drop-down to choose the **My Knowledge Dashboard**.

The screenshot shows the Dynamics 365 Customer Service Hub interface. On the left, there is a navigation bar with various sections like Home, Recent, Pinned, My Work, Dashboards (which is highlighted with a red box), Activities, Customers, Service, Knowledge, and Devices. The main area is titled 'Sandbox' and shows a dashboard titled 'Tier 1 Dashboard'. A dropdown menu under 'Tier 1 Dashboard' is open, with 'My Knowledge Dashboard' also highlighted with a red box. The dashboard itself has three tiles: 'My Resolved Cases' (No data available), 'My Draft Emails' (No data available), and 'My Activities' (No data available). Below the dashboard, there is a section for 'In Progress' cases, which includes three items: 'Walker Leg Broken', 'Electric Cart Battery Replace...', and 'Finger Splint Order', each with a status icon (WL, EC, FS) and a brief description.

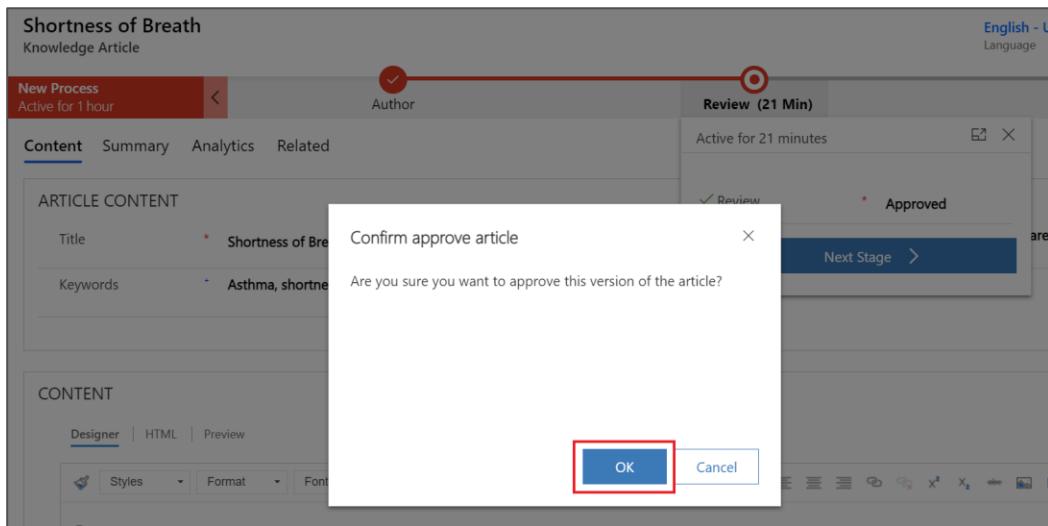
2. Note the **Shortness of Breath** knowledge article in **My Active Articles** stream

The screenshot shows the Dynamics 365 Customer Service Hub interface again. The navigation bar and dashboard structure are similar to the previous screenshot. The 'My Knowledge Dashboard' is selected in the dropdown menu. The main area now displays the 'My Active Articles' stream, which is highlighted with a red box. This stream lists one article: 'Shortness of Breath' by 'IAD User 01', with a status of 'Needs review'. To the right of the stream, there are several other dashboard tiles: 'By Subject' (Default (1)), 'Views by Subject' (a chart showing 0 views for Default Subject), 'By Owner' (IAD User... (1)), 'By Status Reason' (Needs review), and 'Other Queues and Views' which includes 'My Published Articles' (0), 'My Expired Articles' (0), and 'My Articles Expiring ...' (0).

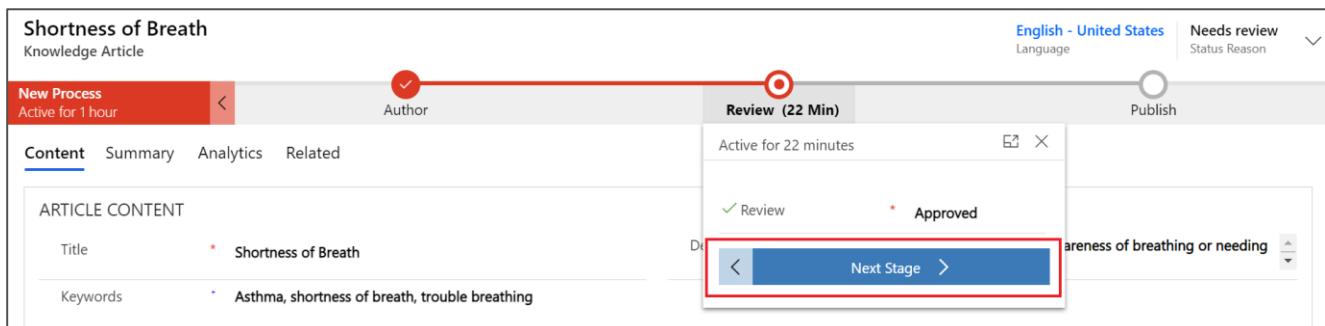
3. Select the **Shortness of Breath** knowledge article.
4. On the Business process bar, in the **Review** stage and in the **Review** drop-down, select **Approve**.



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**.

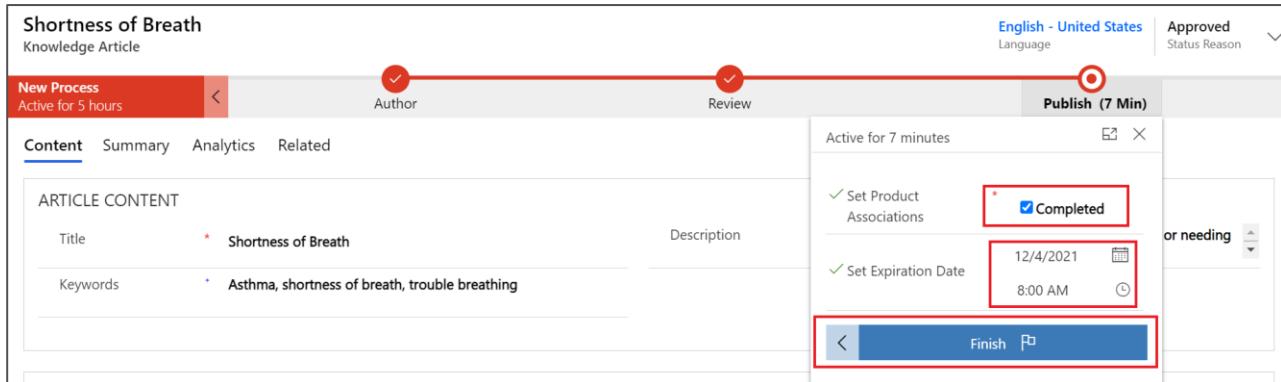


Congratulations! You have successfully reviewed and approved the knowledge article. We will show you how to publish the Knowledge Articles to be available during patient service center calls.

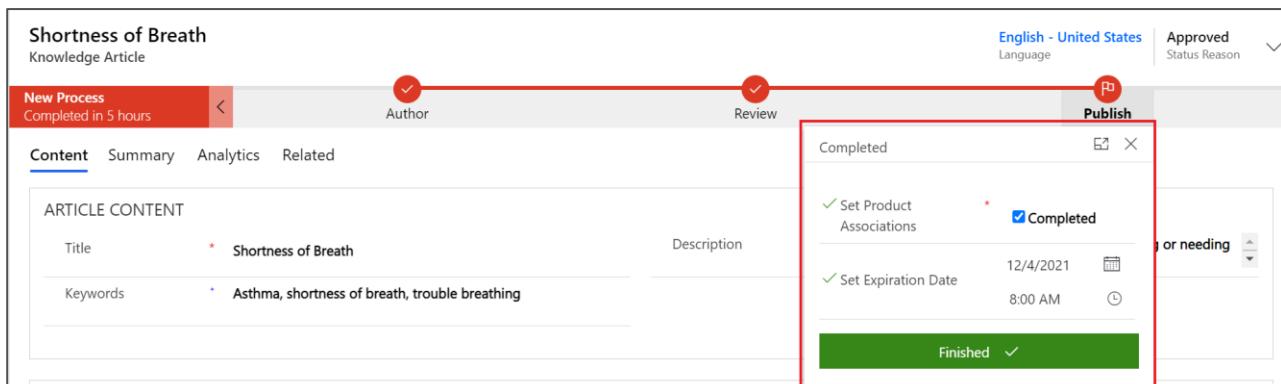
Task 5: Publish your Knowledge Article

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

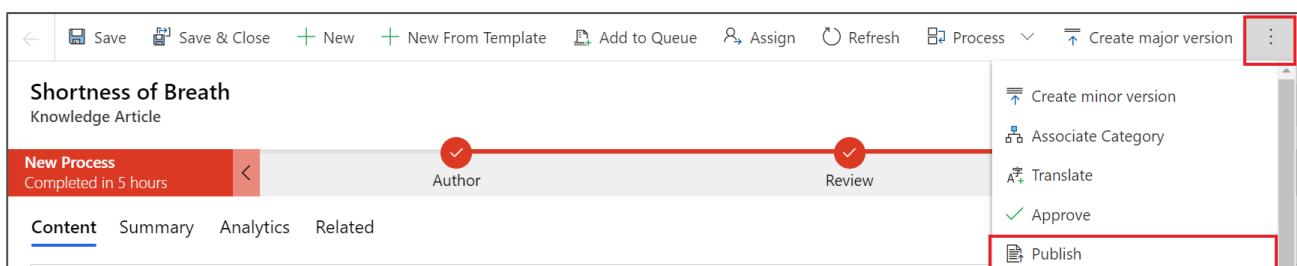
1. In your **Shortness of Breath** Knowledge Article, Select the **Publish** stage.
 - a. For **Set Product Associated** check the box **Completed**.
 - b. Add an **Expiration Date** for one year from now.
 - c. Select **Finish**



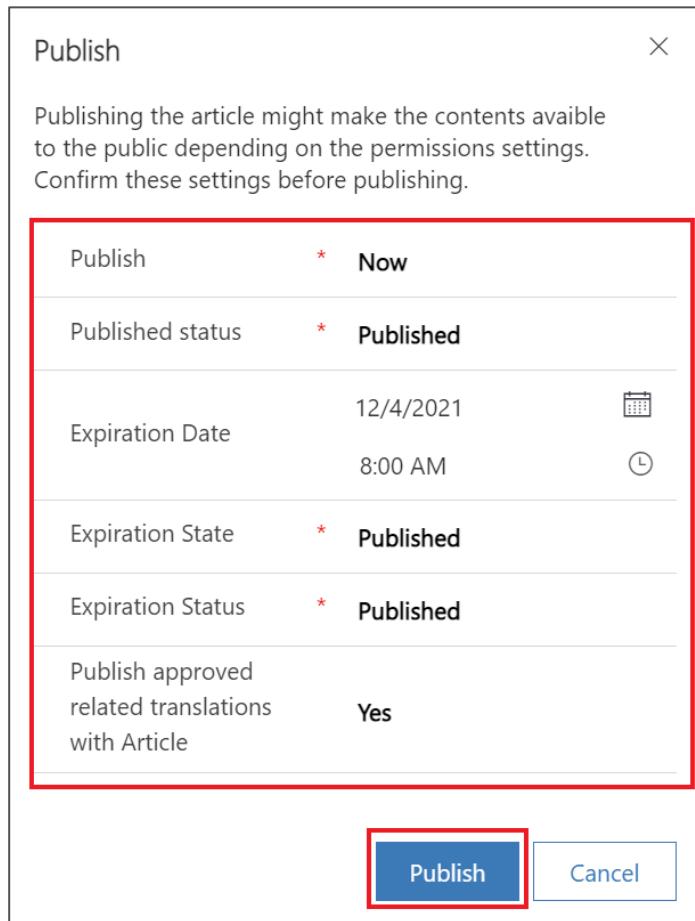
2. Once you select Finish, the business process flow should show as completed.



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.

There's a lot you can do with Knowledge Articles and this only touches on a small portion of the capabilities. Check out additional knowledge article references to learn more:

[Knowledge Management](#)

[Knowledge Articles](#)

[Create and manage knowledge articles](#)

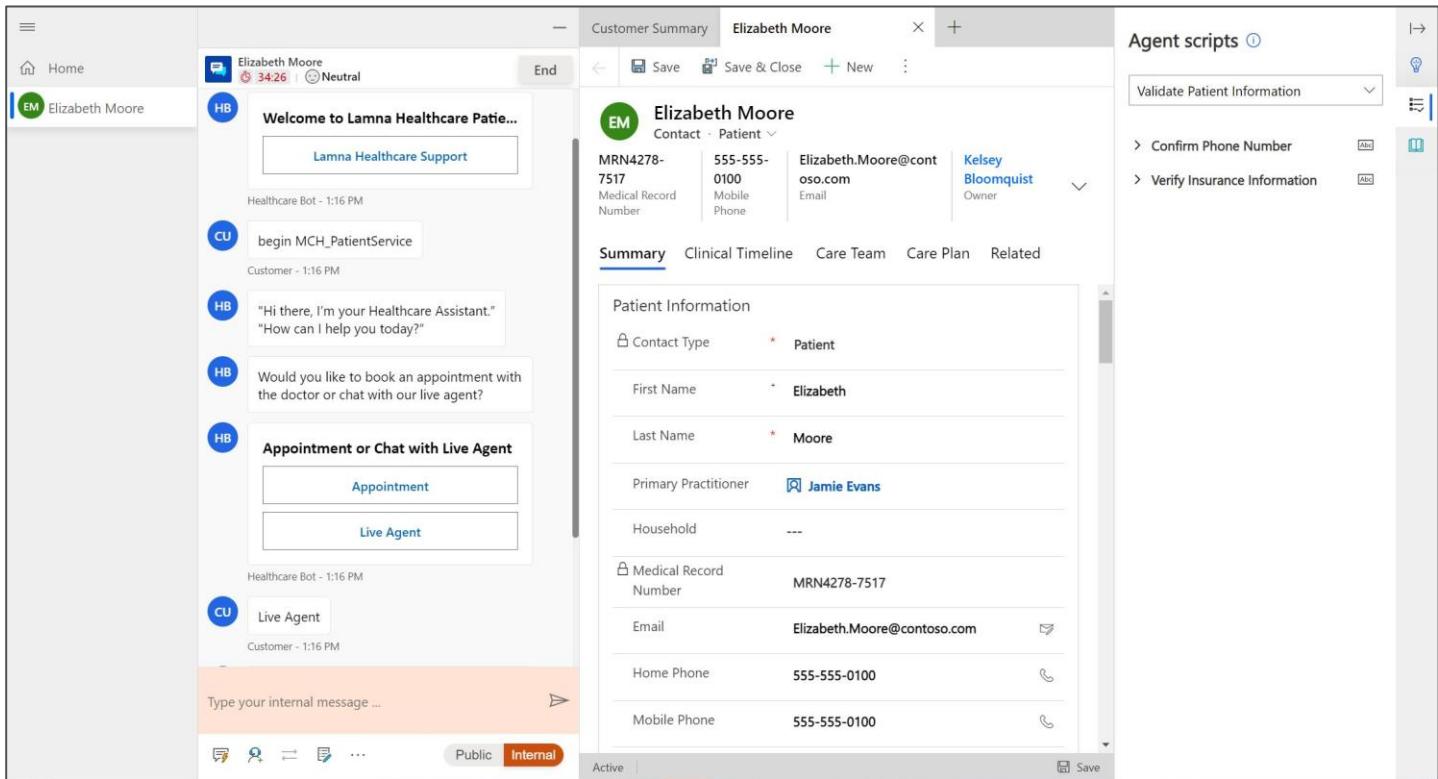
[Search and Share Knowledge Articles](#)

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.

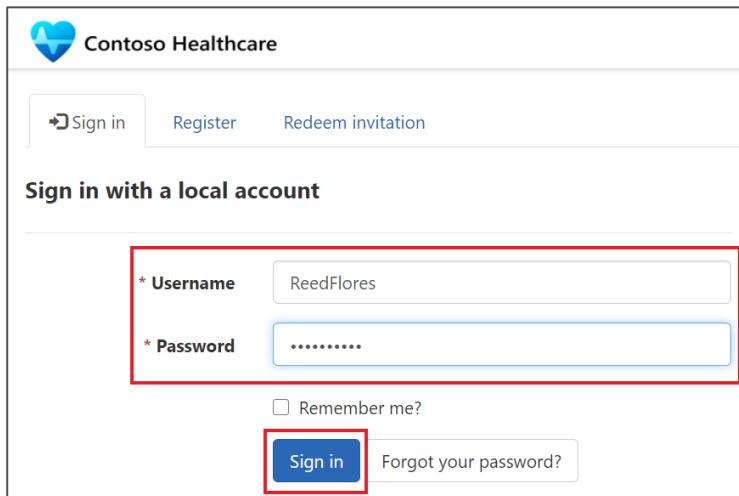
Note: To do this exercise, you must have completed "Lab 04: Health Bot & Omnichannel". During that lab, if you did not add the Health Bot content snippet to the Healthcare Patient Portal chat widget code, please see [Appendix Task 1](#).

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.



Task 1: Patient Logs into Access Portal & Agent logs into Patient Service Center

1. Open the **Lamna Healthcare Patient Portal** app.
 - a. Navigate to the [Power Apps](#).
 - b. Select **Apps > Lamna Healthcare Patient Portal** app.
 - c. Open the app by selecting the app name or clicking **Browse**.
2. Sign into the Patient Portal using the credentials you created in [Exercise 1, Task 2](#).



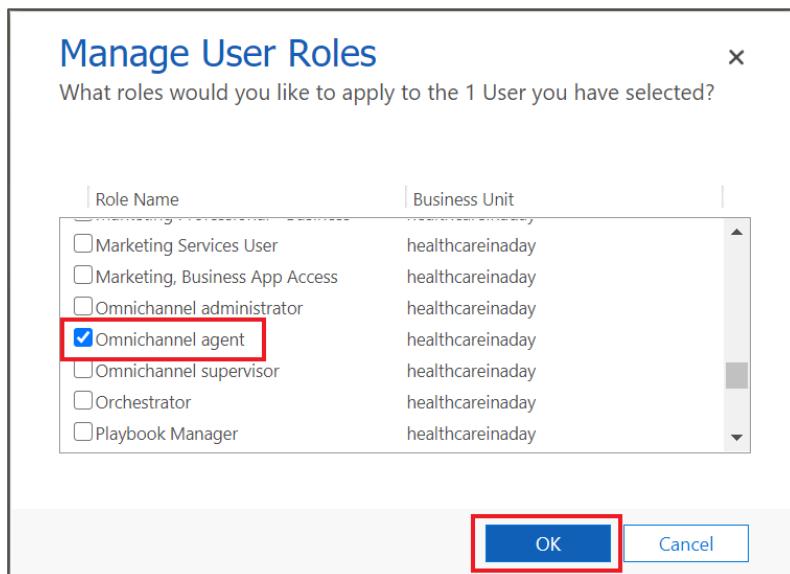
3. You should be directed to the portal Homepage.

The screenshot shows the Contoso Healthcare Patient Access Portal homepage for user 'Reed Flores'. The left sidebar includes links for Home, Find a doctor, Messages, Appointments, Medical records, Medications, Allergies, Conditions, Visit summaries, Care plans, and Care team. The main content area features a 'Welcome Reed Flores' message and three cards: 'Schedule an appointment', 'View messages', and 'Find a doctor'. Below these cards are sections for 'Unread messages' and 'Medications', both indicating no records. At the bottom right is a 'Let's Chat!' button with a speech bubble icon and the text 'We're Online'.

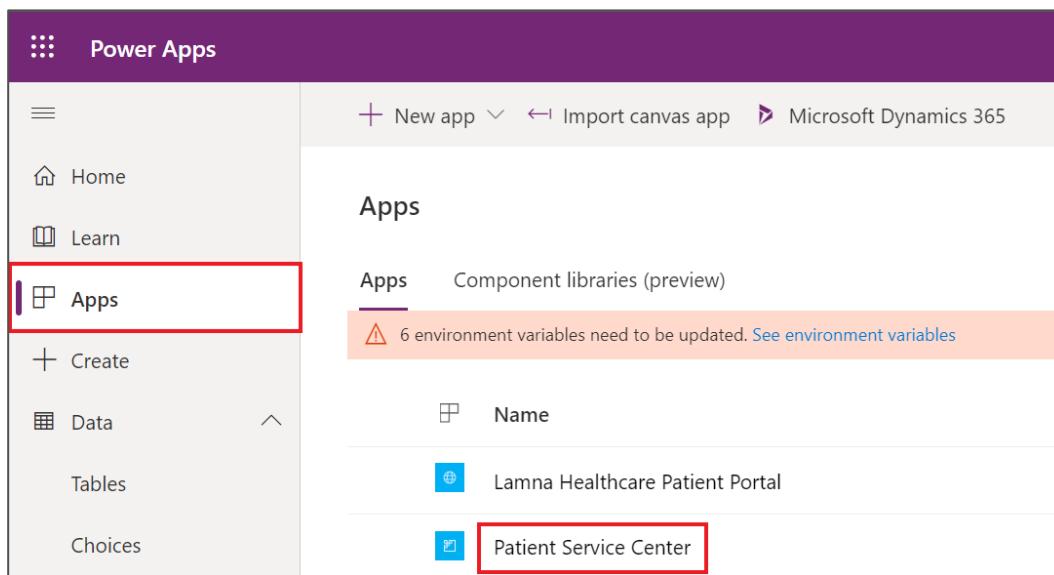
4. Your Patient is ready to go in the Patient Portal. Now we need to make sure an agent is available for then the Health Bot needs to escalate.

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

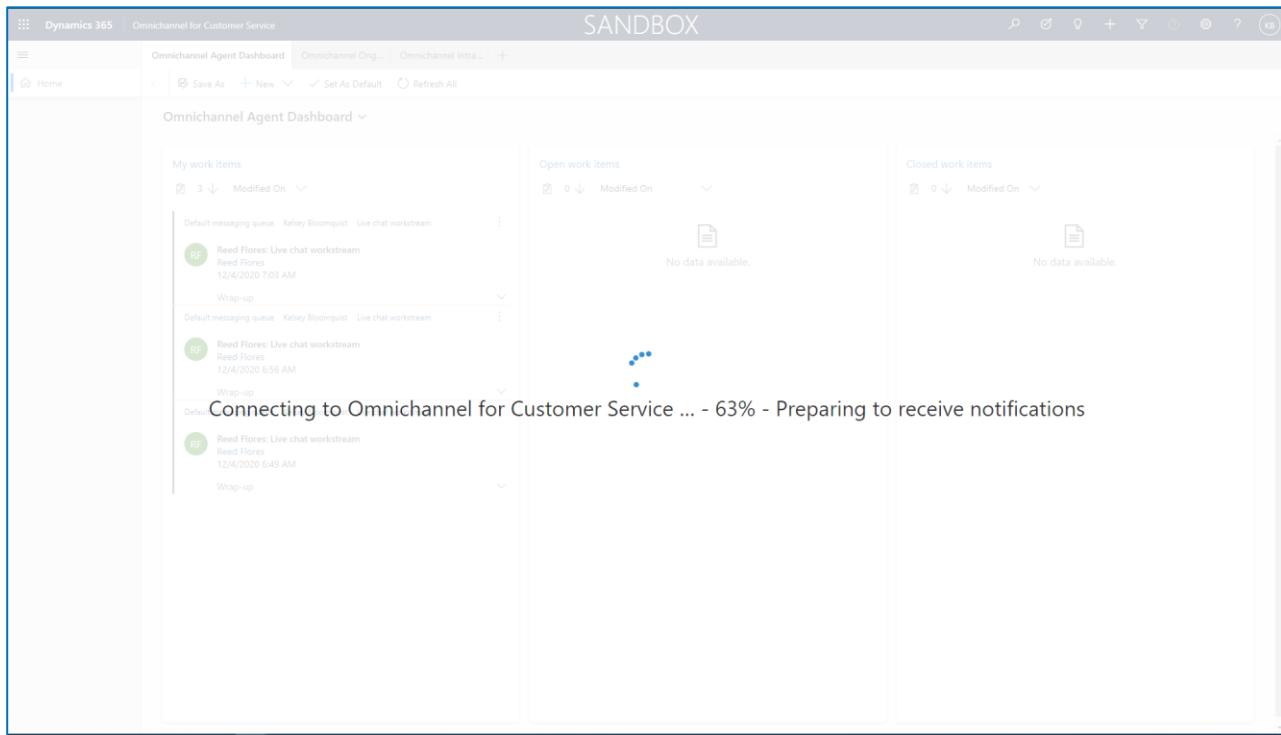
5. If you didn't assign the Omnichannel agent role previously, assign the proper role by following the steps in [Exercise 2, Task 1 – Assign Productivity User Roles](#). Once you've selected your user and clicked **Manage Roles**, assign the **Omnichannel agent** role and click **OK**.



6. Open the **Patient Service Center*** app. (*May show as **Omnichannel for Customer Service**)
 - a. Navigate to the [Power Apps](#).
 - b. Select **Apps > Patient Service Center*** app.
 - c. Select **More Commands (...)** > **Play** (or select the app name).



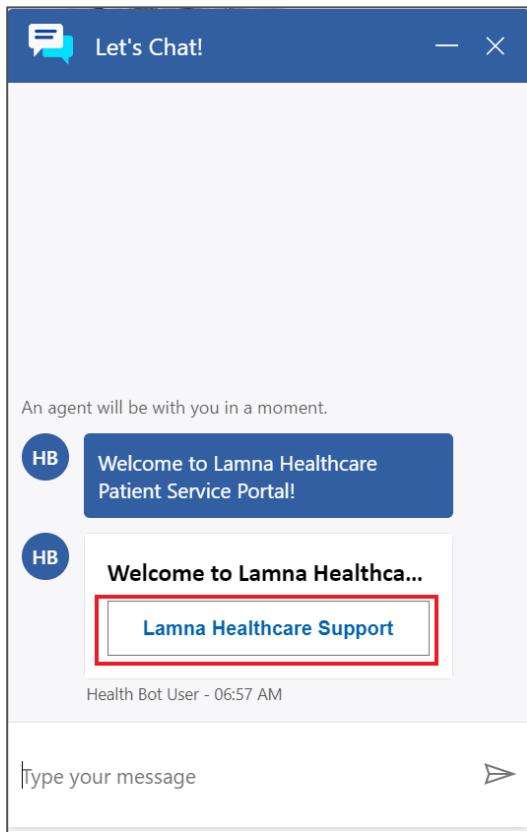
7. In the **Patient Service Center*** app, you should see a "Loading..." splash screen that goes through percentages.



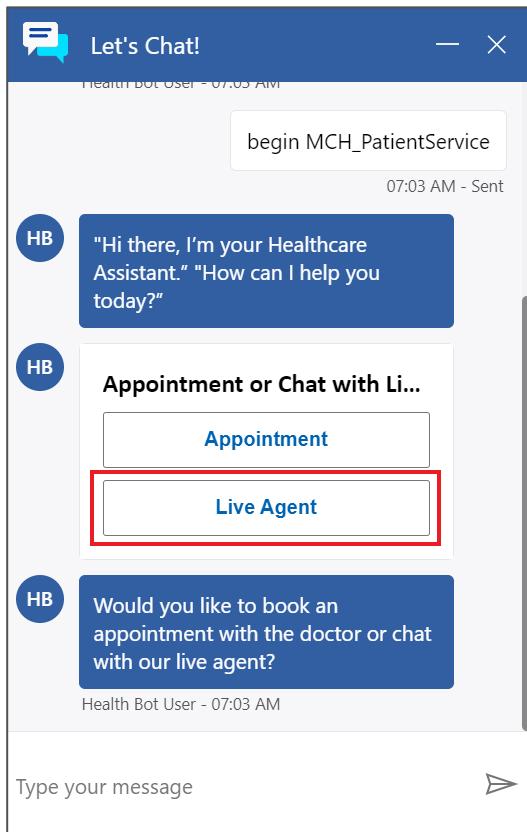
- a. If you don't see the splash screen and the presence indicator is grayed out, escalation into the app from the health bot won't work properly.
- b. Refresh again or close and reopen Patient Service Center until the splash screen appears. You may need to close all other apps or close incognito altogether and sign back in.
- c. 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.
8. Once your presence indicator is green, you are ready to accept patient escalations.
9. If there are issues with presence indicator that can't be resolved, continue with next Task.

Task 2: Patient Escalates through Healthcare Bot

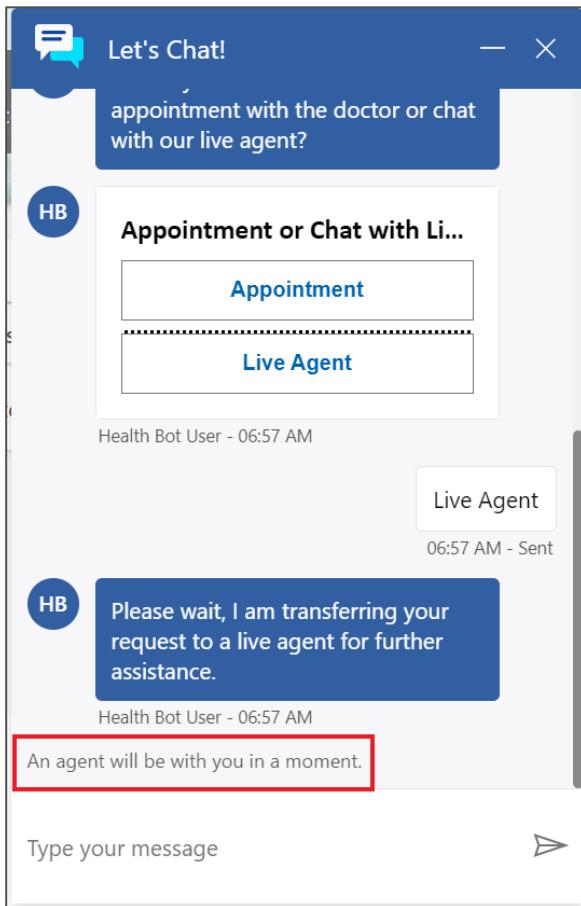
1. Select the **Let's Chat** Health Bot chat widget in the bottom right corner of the portal.
2. The Health Bot should go through the same conversation you created in Lab 03.
 - a. Make sure you set the Welcome message in the Health Bot in Lab 03
 - b. If the welcome message doesn't show, check the settings you did in Lab 03 (Teams and Human handoff enabled)
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.**



- Switch over to **Patient Service Center*** so you can accept the escalation to you 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.

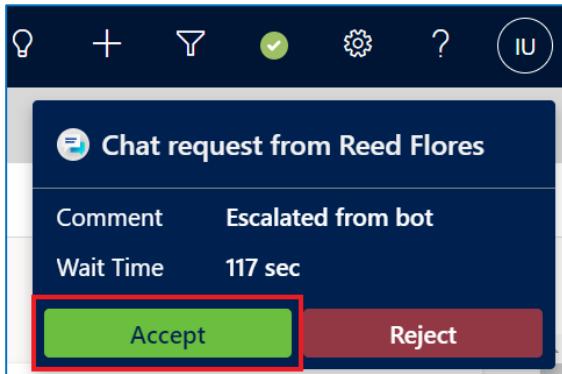
Task 3: Agent Provides Personalized Care in Patient Service Center with the Productivity Pane

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.

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



- 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.

The screenshot displays the Microsoft Healthbot interface. On the left, there's a sidebar with navigation links like Home and a list for Elizabeth Moore. The main area shows a conversation with a healthcare bot. The bot messages include:

- Welcome to Lamna Healthcare Patie...
- "Hi there, I'm your Healthcare Assistant."
- "How can I help you today?"
- Would you like to book an appointment with the doctor or chat with our live agent?
- Appointment or Chat with Live Agent
- Appointment
- Live Agent

 Below the bot messages is a text input field labeled "Type your internal message ...". The productivity pane on the right shows a summary of Elizabeth Moore's information, including her medical record number (MRN4278-7517), contact details (555-555-0100, Elizabeth.Moore@contoso.com), and owner (Kelsey Bloomquist). It also lists "Agent scripts" such as "Validate Patient Information", "Confirm Phone Number", and "Verify Insurance Information".

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". 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.

Key References:

[Healthbot](#)

[Enable Bot to escalate and end conversation](#)

Summary

Congratulations! You have completed **Lab 05: Patient Access Portal & Patient Service Center**.

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

1. Configure the Customer Self-Service Portal to Healthcare Patient Portal.
2. Invite a patient to the portal and redeem the invitation as the user.
3. Navigate the Healthcare Patient Portal.
4. Add the necessary roles for agents and configurations.
5. Create Agent Scripts and associate them with a Session.
6. Set Knowledge Management settings.
7. Create, review, approve, and publish Knowledge Articles.
8. Add Healthbot to the Patient Portal.
9. Converse with the Health Bot through the Portal.
10. Escalate to a human agent through the Health Bot.
11. Provide personalized care as a Patient Service Center agent using the productivity pane with Agent Scripts and Knowledge Articles.

Lab Survey

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

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

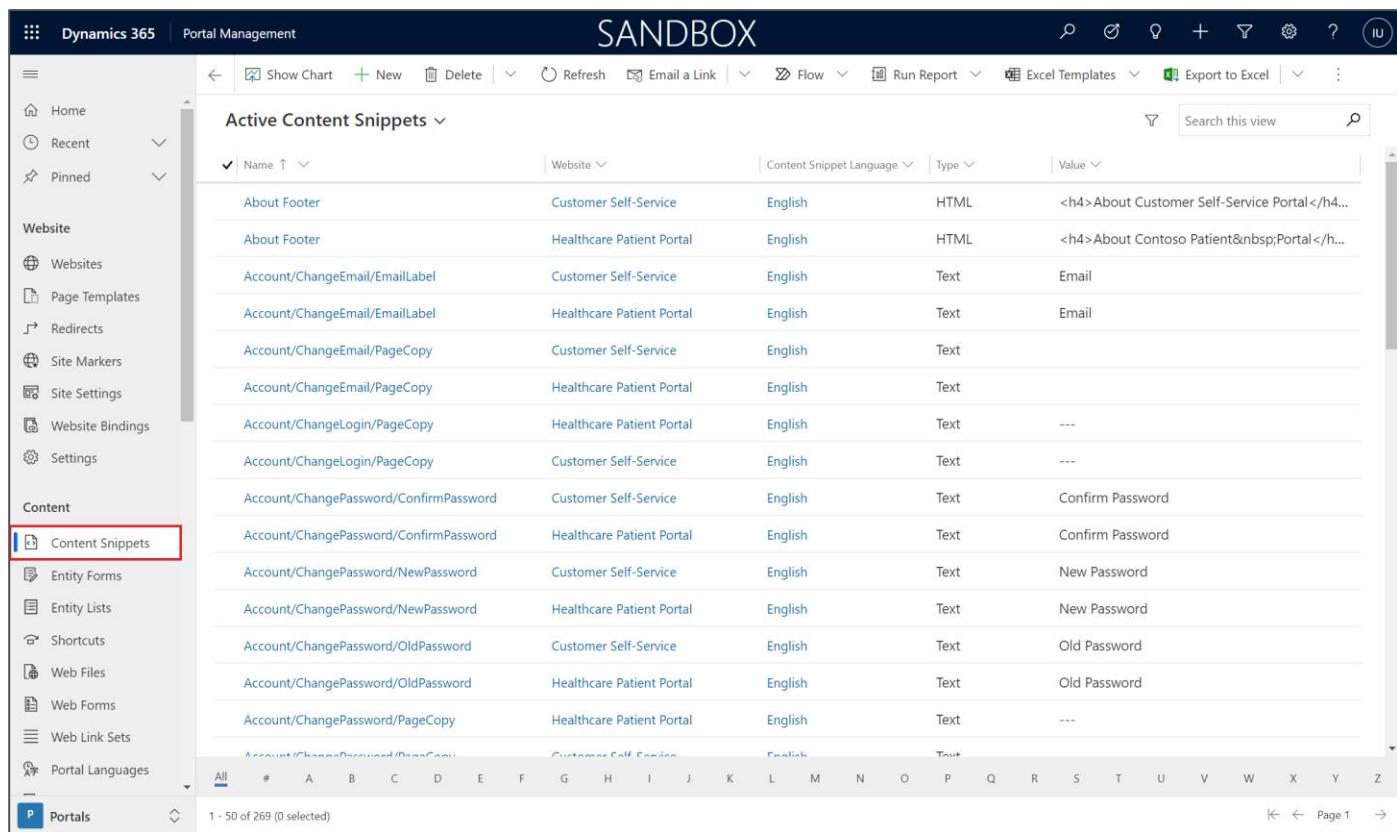
You may provide feedback for each module as you complete it or at the end once you've completed all the modules. Thank you!

Appendix

Task 1: Add Health Bot Widget Code to Content Snippet

In this task, you will add the Health Bot widget code into the content snippet for the Healthcare Patient Portal website.

1. Open the Portal Management app.
 - a. Navigate to the [Power Apps](#).
 - b. Select **Apps > Portal Management** app.
 - b. Select **More Commands (...)** > **Play** (or select the app name).
2. Select **Content Snippets** in the left navigation panel.



The screenshot shows the Dynamics 365 Portal Management interface. The left sidebar has sections like Home, Recent, Pinned, Website, Page Templates, Redirects, Site Markers, Site Settings, Website Bindings, and Settings. Under Content, 'Content Snippets' is selected and highlighted with a red box. The main area displays a list of 'Active Content Snippets' with columns: Name, Website, Content Snippet Language, Type, and Value. A search bar at the top right contains the text 'Search this view'. The 'Value' column for the 'About Footer' snippet shows the HTML code: <h4>About Customer Self-Service Portal</h4>.

Name	Website	Content Snippet Language	Type	Value
About Footer	Customer Self-Service	English	HTML	<h4>About Customer Self-Service Portal</h4>
About Footer	Healthcare Patient Portal	English	HTML	<h4>About Contoso Patient Portal</h4>
Account/ChangeEmail/EmailLabel	Customer Self-Service	English	Text	Email
Account/ChangeEmail/EmailLabel	Healthcare Patient Portal	English	Text	Email
Account/ChangeEmail/PageCopy	Customer Self-Service	English	Text	
Account/ChangeEmail/PageCopy	Healthcare Patient Portal	English	Text	
Account/ChangeLogin/PageCopy	Customer Self-Service	English	Text	
Account/ChangeLogin/PageCopy	Healthcare Patient Portal	English	Text	
Account/ChangePassword/ConfirmPassword	Customer Self-Service	English	Text	Confirm Password
Account/ChangePassword/ConfirmPassword	Healthcare Patient Portal	English	Text	Confirm Password
Account/ChangePassword/NewPassword	Customer Self-Service	English	Text	New Password
Account/ChangePassword/NewPassword	Healthcare Patient Portal	English	Text	New Password
Account/ChangePassword/OldPassword	Customer Self-Service	English	Text	Old Password
Account/ChangePassword/OldPassword	Healthcare Patient Portal	English	Text	Old Password
Account/ChangePassword/PageCopy	Healthcare Patient Portal	English	Text	---

3. In **Active Content Snippets**, type “**Chat Widget**” in the Search box (refer below picture).
 - a. It retrieves **Chat Widget Code** records.
 - b. Select to open the Chat Widget Code record related to **Healthcare Patient Portal**.



The screenshot shows the 'Active Content Snippets' list with a search filter applied. The search bar at the top right contains the text 'chat widget'. Two records are listed in the results:

- Chat Widget Code (Customer Self-Service)
- Chat Widget Code (Healthcare Patient Portal)

The second record, 'Chat Widget Code (Healthcare Patient Portal)', is highlighted with a red box.

4. In the **Chat Widget Code** record, paste in **Value (HTML)** the **Chat Widget Code snippet** that you copied and stored in **Lab 03: Health Bot & Omnichannel** (see screenshot below)

The screenshot shows the Dynamics 365 Portal Management interface. On the left, a navigation bar includes options like 'Content Snippets', 'Entity Forms', 'Web Pages', and 'Portals'. The main area displays a 'Content Snippet' record titled 'Chat Widget Code'. The 'General' tab is selected, showing fields such as Name ('Chat Widget Code'), Website ('Healthcare Patient Portal'), Display Name ('Chat Widget Code'), Type ('HTML'), and Content Snippet Language ('---'). Below these fields is a 'Value (HTML)' section containing the following code:

```

1 <script id="Microsoft_Omnichannel_LCWidget" src="https://oc-cdn-ocprod.azureedge.net/livechatwidget/scripts/LiveChatBootstrapper.js" data-app-id="12345678-1234-1234-1234-1234567890ab"></script>

```

The 'Designer' tab is also visible in the Value (HTML) section.

5. If you need to retrieve the value again, go back to Power Apps and follow these steps:

- Open the **Omnichannel Administration** app.
- Select **Chat** from navigation bar.
- Select your **Chat Widget** you created in Lab 03.

The screenshot shows the Dynamics 365 Omnichannel Administration interface. On the left, a navigation bar includes 'Home', 'Recent', 'Pinned', 'Channels', 'Entity Records', 'Chat' (which is highlighted with a red box), and 'SMS'. The main area displays a list titled 'Active Chat Widgets' with one record shown:

Name	Status	Modified On
Patient Portal Chat Widget	Active	12/2/2020 4:32 AM

- Copy the **Code snippet** from your **Chat Widget** record.

The screenshot shows the 'Patient Portal Chat Widget' configuration page. It includes sections for General settings, Work distribution, Proactive chat, File attachments, Chat Transcripts, and Customer waiting. A red box highlights the 'Code snippet' section on the right, which contains the following code:

```

<script id="Microsoft_Omnichannel_LCWidget" src="https://oc-cdn-ocprod.azureedge.net/livechatwidget/scripts/LiveChatBootstrapper.js" data-app-id="add5014c-95d4-4568-a54d-4b86c28f775e" data-lcv-version="prod" data-org-id="5ce1760a-c5a9-43f7-9ee6-3f02a3e1b036" data-org-url="https://d03bf642468246b4809e0a2eb61de6-crm.omnichannelengagementhub.com"></script>

```

- e. Go back to the **Portal Management** app.
- f. In the **Chat Widget Code** record, paste in **Value (HTML)** the **Chat Widget Code snippet**.

The screenshot shows the 'Chat Widget Code' record in the Dynamics 365 Portal Management app. The 'General' tab is selected. The 'Name' field is set to 'Chat Widget Code', and the 'Website' field is set to 'Healthcare Patient Portal'. A red box highlights the 'Value (HTML)' field, which contains the same code snippet as shown in the previous screenshot:

```

<script id="Microsoft_Omnichannel_LCWidget" src="https://oc-cdn-ocprod.azureedge.net/livechatwidget/scripts/LiveChatBootstrapper.js" data-app-id="add5014c-95d4-4568-a54d-4b86c28f775e" data-lcv-version="prod" data-org-id="5ce1760a-c5a9-43f7-9ee6-3f02a3e1b036" data-org-url="https://d03bf642468246b4809e0a2eb61de6-crm.omnichannelengagementhub.com"></script>

```

6. Click **Save & Close**.

Congratulations! You have added the Health Bot Chat Widget to the Healthcare Patient Portal.

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