



Microsoft Cloud for Healthcare Industry Labs

Lab 06: Virtual Care

Step-by-Step Lab

September 2021

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Overview

Learning Objectives

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

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

Prerequisites

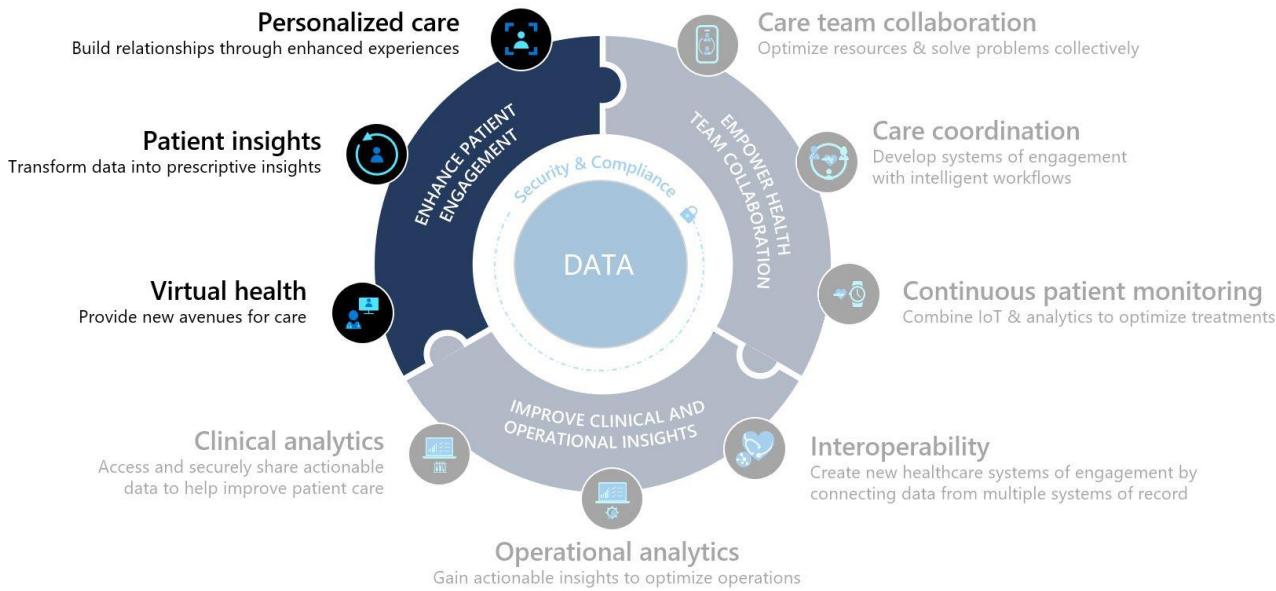
- Lab 01 – Care Management
- Lab 05 – Patient Access & Service Center

Virtual Clinic Application

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

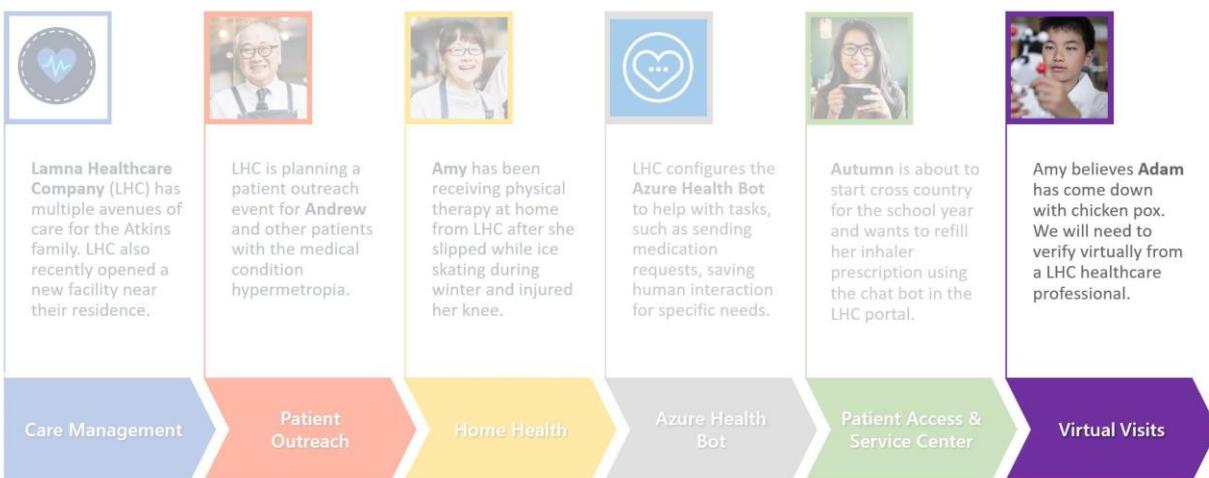
Industry Prioritized Scenarios

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



Atkins Family Healthcare Story

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



After coming home from school, Adam's mother, Amy, noticed that Adam had several spots on his arms that were not there earlier in the day. Concerned that Adam might have contracted chicken pox, Amy decides to schedule a virtual appointment with Adam's practitioner to get a diagnosis.

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

Exercise 1: Configure Virtual Clinic Application

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

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

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

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

The screenshot shows the 'Instant virtual appointment' section of the Patient Portal. On the left, there is a sidebar with navigation links: Home, Find a doctor, Messages, Appointments, Medical records, and Personal information. The 'Personal information' link is currently selected, indicated by a dropdown arrow icon. At the top right, there are four buttons: 'Reason' (highlighted with a blue border), 'Personal', 'Insurance', and 'Join'. Below these buttons, the 'Select a reason' section is displayed. It contains a grid of six boxes, each representing a different practitioner specialty:

- Pulmonary disease**: Pulmonary disease is often treated by a pulmonologist, a specialist in the treatment of lung and breathing issues ranging from asthma to chronic obstructive pulmonary disease to lung cancer.
- Primary-care medicine**: The branch of primary-care medicine that provides comprehensive health care to people regardless of age or sex and emphasizes the family unit.
- Cardiology**: Branch of medicine for conditions such as blockages, heart injuries, and diseases, and keep their eye on other factors such as high cholesterol, diabetes, and high blood pressure.
- Gastroenterology**: Branch of medicine concerned with the structure, functions, diseases, and pathology of the stomach and intestine.
- Oncology**: Branch of medicine concerned with the prevention, diagnosis, treatment, and study of cancer.
- Physical therapy**: Therapy for the preservation, enhancement, or restoration of movement and physical function impaired or threatened by disease, injury, or disability.

1. Go to make.powerapps.com.
2. Select Apps and then open the **Virtual Clinic** application.

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 with a red box), Create, Dataverse, Flows, Chatbots, AI Builder, and Solutions. The main area displays a list of apps with columns for Name, Modified, Owner, and Type. The 'Virtual Clinic' app is listed in the middle of the list, also highlighted with a red box. Other apps shown include Lamna Healthcare Patient Portal, Healthcare Administration, FHIR Sync Agent Administration, Patient Outreach, Patient Service Center, Home Health, Care Team Member, Care Management, Omnidigital Admin center, Customer Service workspace, and Omnidigital Administration.

3. In the upper righthand corner, click the **funnel icon** which will open **Advanced Find**.



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

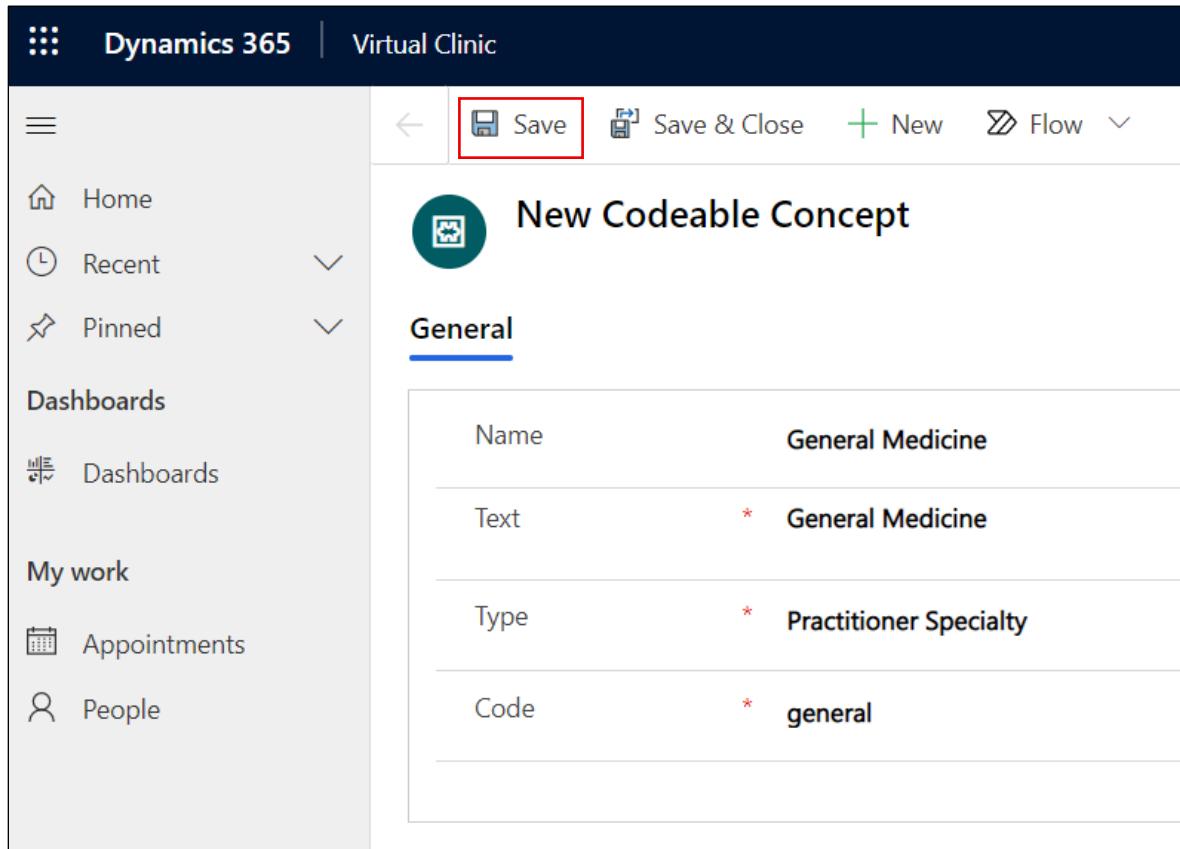
The screenshot shows the 'ADVANCED FIND' ribbon tab selected. Below it, the 'Look for:' search bar contains the text 'Codeable Concepts' (highlighted with a red box). Other visible buttons include 'Query', 'Saved Views', 'Results', 'New', 'Save', 'View', 'Save As', 'Edit Columns', 'Edit Properties', 'Clear', 'Group AND', 'Group OR', 'Details', 'Download Fetch XML', and 'Debug'.

5. Click **New Codeable Concept**.

The screenshot shows the 'CODEABLE CONCEPTS' ribbon tab selected. Below it, the 'New Codeable Concept' button is highlighted with a red box. Other buttons include 'Edit', 'Show As', 'Activate', 'Deactivate', 'Delete Codeable Concept', 'Book', and 'Records'.

6. In the new Codable Concept record, fill in the following details and click Save.

- a. **Name:** General Medicine
- b. **Text:** General Medicine
- c. **Type:** Practitioner Specialty
- d. **Code:** general

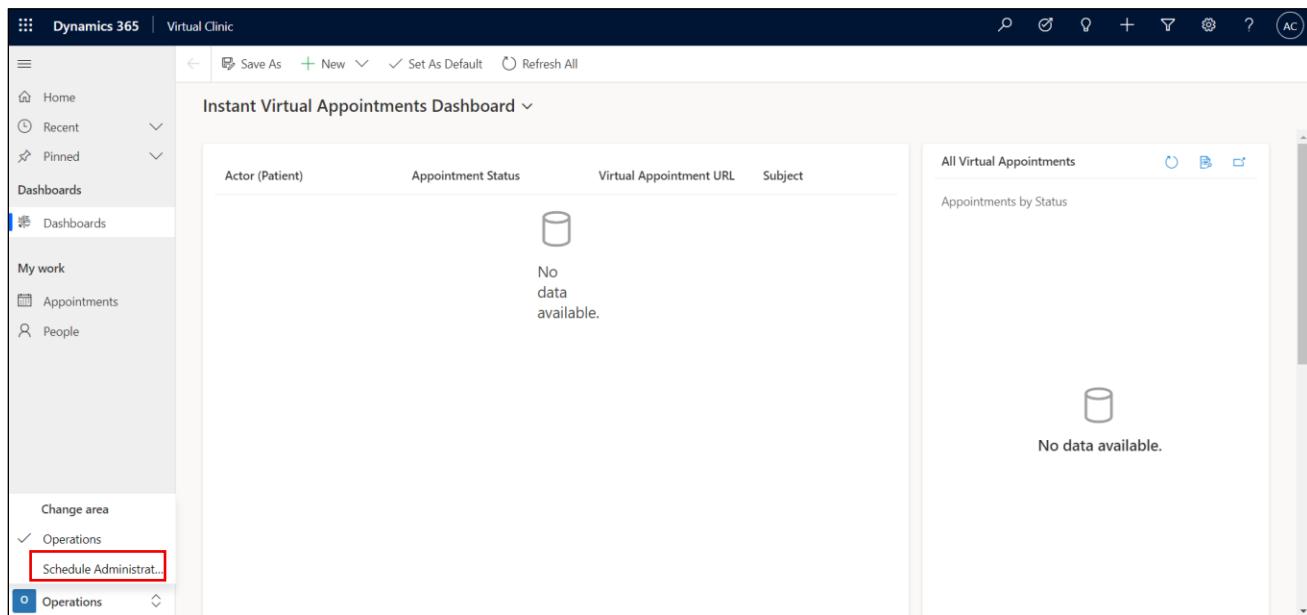


Congratulations! You have created a new Practitioner Specialty that will now be available for selection as an appointment visit in the Patient Portal.

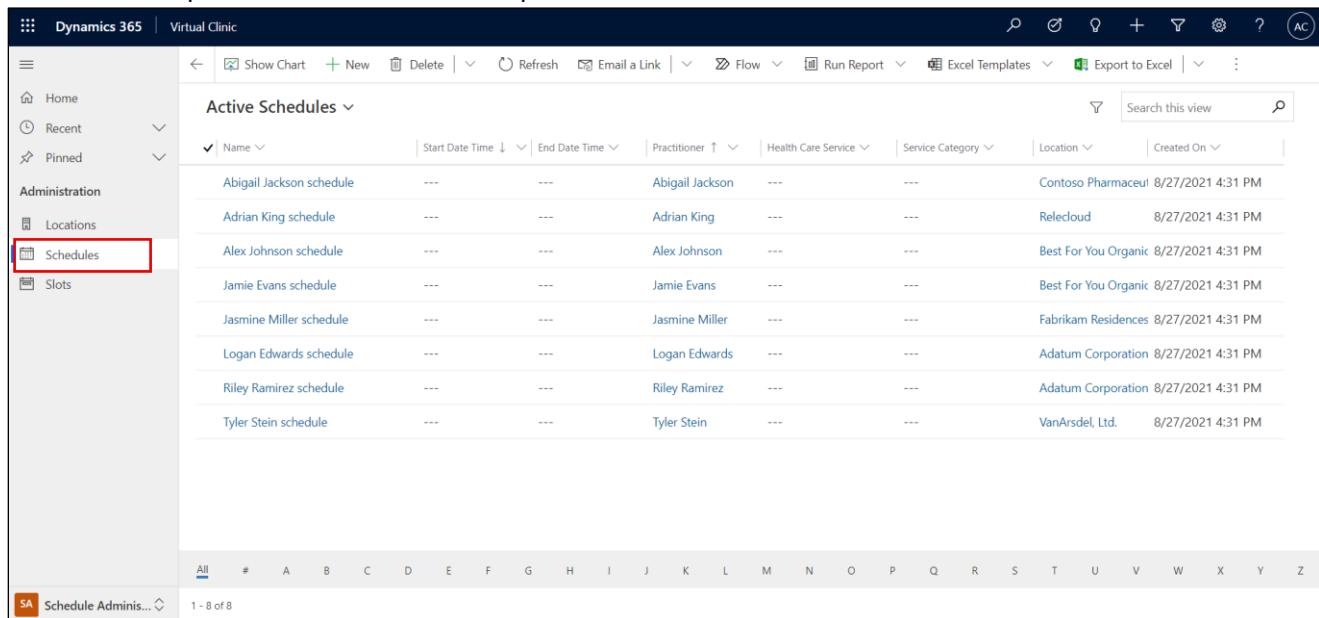
Task 2: Enable a Practitioner's Schedule

In this task, you will configure the practitioner's schedule to allow patients to book appointments with them using the Patient Portal.

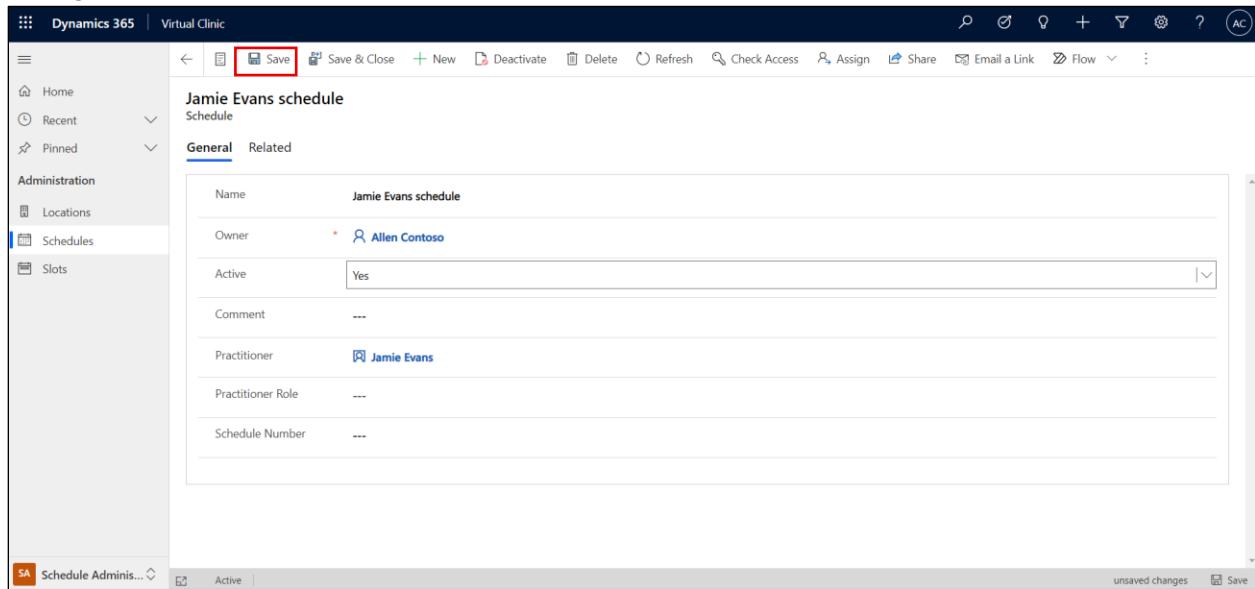
1. In the Virtual Clinic app, change the sitemap area in the lower left corner from Operations to **Schedule Administration**.



2. On the sitemap, select **Schedules** and open the **Jamie Evans schedule** record.



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

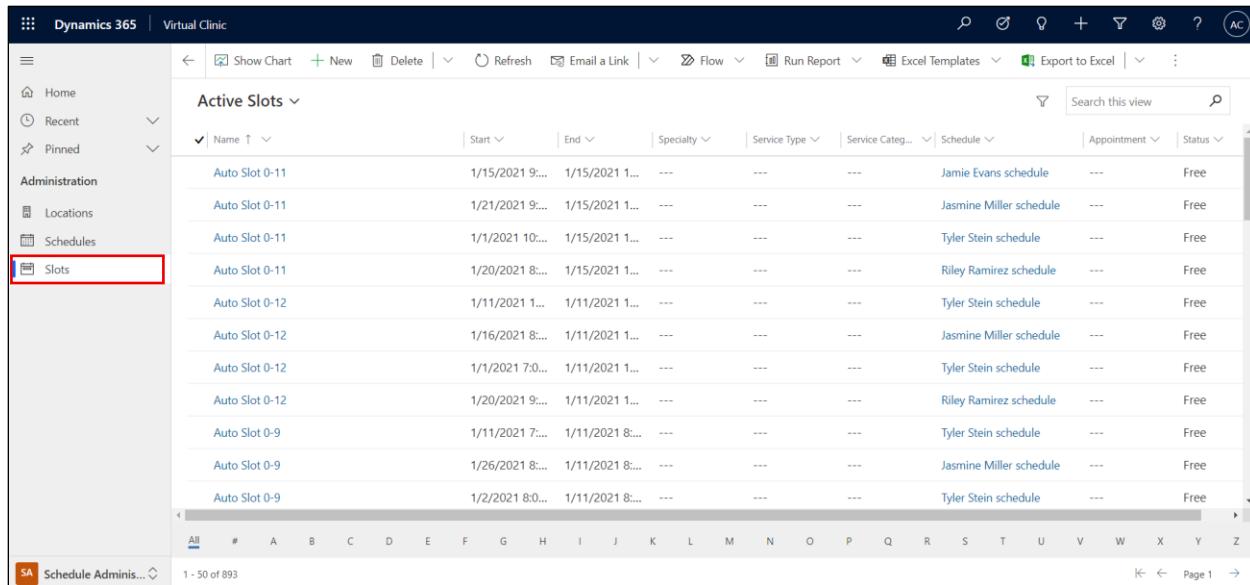


Congratulations! You have enabled a practitioner's schedule to be used for booking virtual appointments.

Task 3: Configure Slots

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

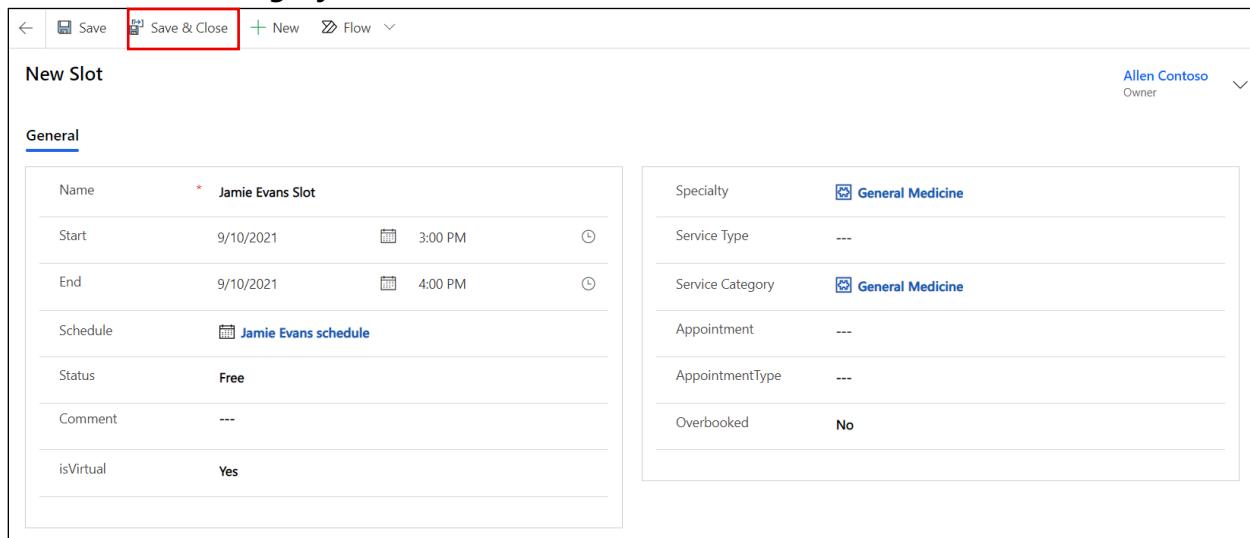
1. In the Virtual Clinic app, select **SLOTS** on the Site Map and click **+ New**.



The screenshot shows the Dynamics 365 Virtual Clinic application interface. On the left, there is a navigation bar with links for Home, Recent, Pinned, Administration (Locations, Schedules, Slots), and a search bar. The main area is titled "Active Slots" and lists 10 entries. Each entry includes the name of the slot, its start and end times, specialty, service type, schedule, and status. The "Slots" link in the navigation bar is highlighted with a red box. The bottom of the screen shows a toolbar with various icons and a status bar indicating "Schedule Adminis..." and "1 - 50 of 893".

2. Fill in the following record details and click **Save & Close**.

- Name:** Jamie Evans Slot
- Start:** Today, at a later time
- End:** Today, an hour after the Start
- Schedule:** Jamie Evans schedule
- Status:** Free
- isVirtual:** Yes
- Specialty:** General Medicine (the record you create in this exercise)
- Service Category:** General Medicine



The screenshot shows the "New Slot" form in the Dynamics 365 Virtual Clinic app. The top navigation bar includes Save, Save & Close, New, and Flow. The right side of the screen shows the owner information: "Allen Contoso" and "Owner". The form has tabs for General, Details, and Advanced. The General tab is selected and contains fields for Name, Start, End, Schedule, Status, Comment, and isVirtual. The Details tab contains fields for Specialty, Service Type, Service Category, Appointment, AppointmentType, and Overbooked. The Advanced tab is currently empty. The "Save & Close" button in the top left of the form is highlighted with a red box.

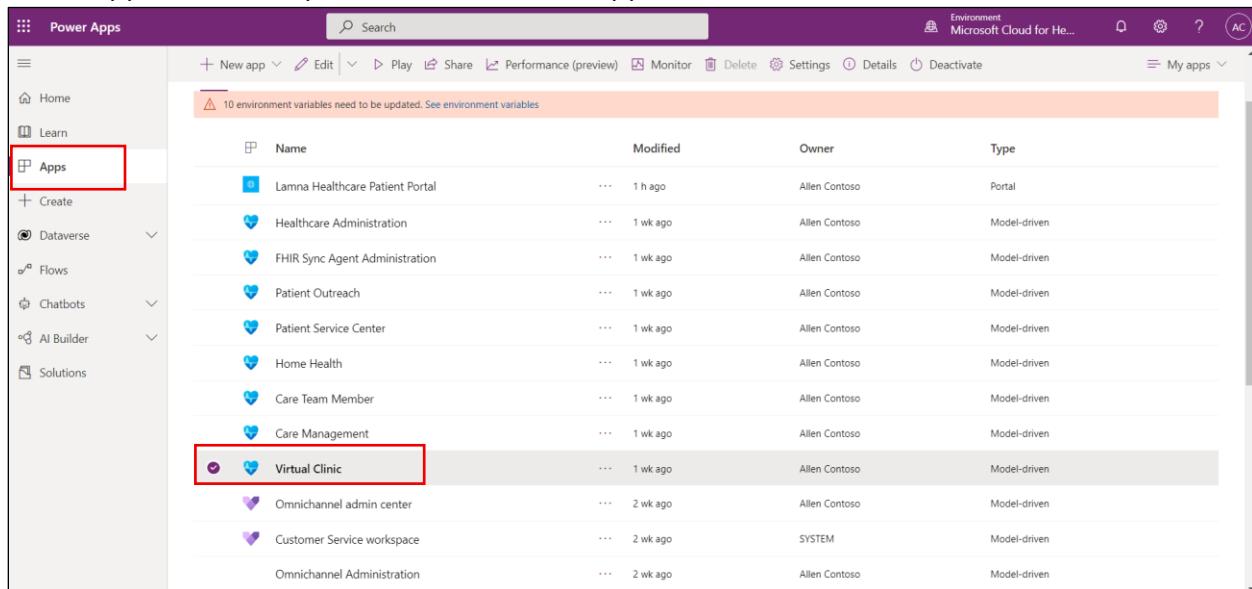
Congratulations! You have created a new virtual slot for the Atkins family to book with their practitioner, Jamie Evans.

Task 4: Configure Mapped System User on Practitioner Record

In this task, you will configure the Mapped System User field on the Practitioner record. This field should be set to the system user that maps to the contact record. In our case here, we will set this field to our logged in user record.

- The Teams meeting is created on this mapped user's calendar (in case of a Virtual appointment).
- In case of an Instant appointment, the meeting is created on the Organizer (organizer email for virtual appointments) specified in the Admin settings

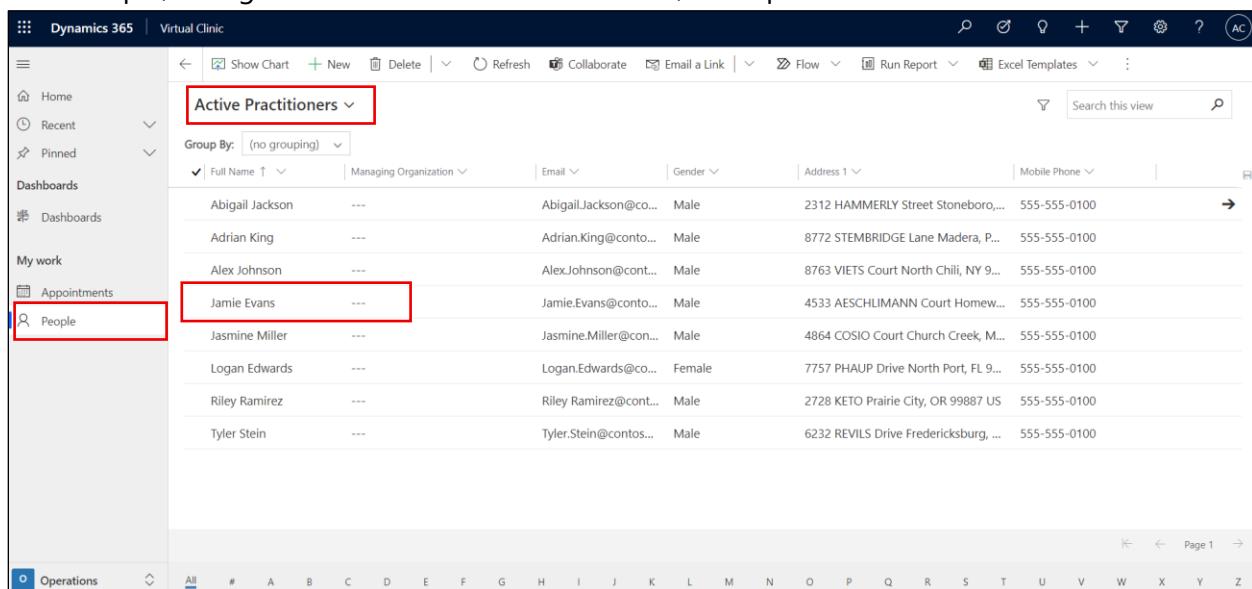
1. Go to make.powerapps.com.
2. Select Apps and then open the **Virtual Clinic** application.



The screenshot shows the Microsoft Power Apps portal. On the left, there is a navigation sidebar with options like Home, Learn, Apps (which is highlighted with a red box), Create, Dataverse, Flows, Chatbots, AI Builder, and Solutions. The main area displays a list of apps. One app, 'Virtual Clinic', is highlighted with a red box. The list includes:

Name	Modified	Owner	Type
Lamna Healthcare Patient Portal	1 h ago	Allen Contoso	Portal
Healthcare Administration	1 wk ago	Allen Contoso	Model-driven
FHIR Sync Agent Administration	1 wk ago	Allen Contoso	Model-driven
Patient Outreach	1 wk ago	Allen Contoso	Model-driven
Patient Service Center	1 wk ago	Allen Contoso	Model-driven
Home Health	1 wk ago	Allen Contoso	Model-driven
Care Team Member	1 wk ago	Allen Contoso	Model-driven
Care Management	1 wk ago	Allen Contoso	Model-driven
Virtual Clinic	1 wk ago	Allen Contoso	Model-driven
Omnichannel admin center	2 wk ago	Allen Contoso	Model-driven
Customer Service workspace	2 wk ago	SYSTEM	Model-driven
Omnichannel Administration	2 wk ago	Allen Contoso	Model-driven

3. Click People, change the view to Active Practitioners, and open the Jamie Evans record.



The screenshot shows the Dynamics 365 Virtual Clinic application. On the left, there is a navigation sidebar with options like Home, Recent, Pinned, Dashboards, Appointments (which is highlighted with a red box), and People. The main area displays a list of practitioners under the 'Active Practitioners' view. One practitioner, 'Jamie Evans', is highlighted with a red box. The list includes:

Full Name	Managing Organization	Email	Gender	Address 1	Mobile Phone
Abigail Jackson	---	Abigail.Jackson@cont...	Male	2312 HAMMERLY Street Stoneboro, ...	555-555-0100
Adrian King	---	Adrian.King@cont...	Male	8772 STEMBRIDGE Lane Madera, P...	555-555-0100
Alex Johnson	---	Alex.Johnson@cont...	Male	8763 VIETS Court North Chili, NY 9...	555-555-0100
Jamie Evans	---	Jamie.Evans@cont...	Male	4533 AESCHLIMANN Court Homew...	555-555-0100
Jasmine Miller	---	Jasmine.Miller@cont...	Male	4864 COSIO Court Church Creek, M...	555-555-0100
Logan Edwards	---	Logan.Edwards@co...	Female	7757 PHAUP Drive North Port, FL 9...	555-555-0100
Riley Ramirez	---	Riley.Ramirez@cont...	Male	2728 KETO Prairie City, OR 99887 US	555-555-0100
Tyler Stein	---	Tyler.Stein@contos...	Male	6232 REVILS Drive Fredericksburg, ...	555-555-0100

4. Select your logged in user as the Mapped System User. Click Save & Close.

The screenshot shows the Dynamics 365 Virtual Clinic interface. The top navigation bar includes 'Dynamics 365' and 'Virtual Clinic'. The left sidebar has sections for Home, Recent, Pinned, Dashboards (with 'Dashboards' selected), My work, Appointments (selected), and People. The main area displays a contact record for 'Jamie Evans' (Contact · Practitioner). The 'Summary' tab is selected. In the 'Practitioner Information' section, 'Mapped System User' is set to 'Allen Contoso'. The 'Patient Interactions' section shows a timeline with three items: a secure message from Elizabeth Moore, a secure message from Jamie Evans, and an auto-post on Jamie Evans's behalf. The 'Patient Details' section shows 'Appointments (EMR)' with a note 'No data available.' At the bottom, there are buttons for 'Operations' (selected), 'Active', 'Save' (disabled), and 'Unsaved changes'.

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

Task 5: Configure Environment Variables

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

1. Go to make.powerapps.com
2. Go to Apps and click on See environment variables

The screenshot shows the Power Apps portal interface. On the left, there's a navigation sidebar with options like Home, Learn, Apps (which is selected), Create, Dataverse, Flows, Chatbots, AI Builder, and Solutions. The main area is titled 'Apps' and shows a list of four apps: 'Lambda Healthcare Patient Portal', 'Healthcare Administration', 'FHIR Sync Agent Administration', and 'Patient Outreach'. A red box highlights a notification bar at the top stating '10 environment variables need to be updated. See environment variables'. Below the notification, there's a table with columns for Name, Modified, Owner, and Type.

Name	Modified	Owner	Type
Lambda Healthcare Patient Portal	3 d ago	Allen Contoso	Portal
Healthcare Administration	1 wk ago	Allen Contoso	Model-driven
FHIR Sync Agent Administration	1 wk ago	Allen Contoso	Model-driven
Patient Outreach	1 wk ago	Allen Contoso	Model-driven

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

The screenshot shows the 'Environment variables' configuration page. It has sections for 'Virtual Appointment URL Domain', 'Entity Updater Service Bus URI', 'Virtual Visit Secret', and 'Virtual Visit Client ID'. The 'Virtual Visit Secret' and 'Virtual Visit Client ID' sections are highlighted with a red box. At the bottom, there are 'Save and close' and 'Cancel' buttons.

Virtual Appointment URL Domain
Enter text
The domain of the portal for button links in HTML emails

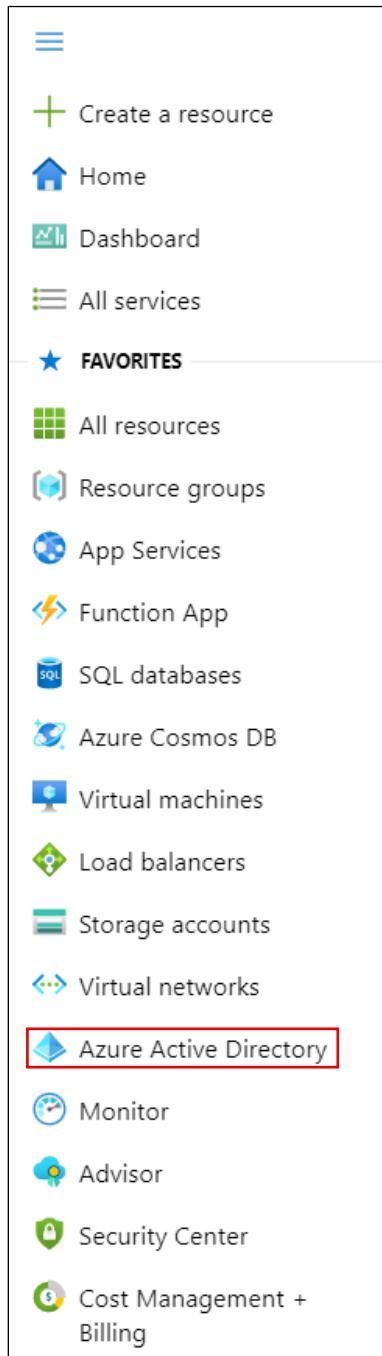
Entity Updater Service Bus URI
Enter text
Important: Do not delete this environment variable or change the Schema Name. This is used by internal logic. Note: The internal logic will first try to pull the default value. If it does not find a default value, then it will try to pull a defined value.
Definition: This represents the URI used for the Service Bus that will receive JSON based CDS record changes. Example:
mservicebus.servicebus.windows.net

Virtual Visit Secret
Enter text
This is the secret used for the Virtual Visit Client ID. It is used to authenticate against the Microsoft Graph for scheduling of the Virtual Visit.

Virtual Visit Client ID
Enter text
The client ID used to authenticate against the Microsoft Graph API. This identity is used to generate the actual virtual visit.

Buttons: Save and close, Cancel

4. Open a new tab in your internet browser and go to portal.azure.com.
5. Search for and select **Azure Active Directory**



6. Click **Add → App registration**.

The image shows the 'Lamna Healthcare | Overview' page in the Azure Active Directory section. The left sidebar has links for Overview, Preview features, Diagnose and solve problems, Manage, and Users. The main area has sections for User, Group, Enterprise application, and Tutorials. A navigation bar at the top includes Add, Manage tenants, What's new, Preview features, Got feedback?, and a search bar. The 'Enterprise application' link in the sidebar and the 'App registration' link in the main menu are both highlighted with red boxes.

7. Name the App, "**Lamna Healthcare – Microsoft Teams Identity**" and click **Register**. After the App registration is created, set up the API Permissions and Secrets.

The screenshot shows the Microsoft Azure 'Register an application' interface. At the top, there's a search bar and a breadcrumb navigation: Home > Lamna Healthcare > Register an application. The main form starts with a 'Name' field containing 'Lamna Healthcare - Microsoft Teams Identity', which is highlighted with a red border and has a green checkmark to its right. Below this is a section for 'Supported account types' with four options: 'Accounts in this organizational directory only (Lamna Healthcare only - Single tenant)' (selected, indicated by a blue radio button), 'Accounts in any organizational directory (Any Azure AD directory - Multitenant)', 'Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)', and 'Personal Microsoft accounts only'. There's also a 'Help me choose...' link. The next section is 'Redirect URI (optional)', with a note about returning authentication responses. At the bottom, there's a link to 'By proceeding, you agree to the Microsoft Platform Policies' and a prominent blue 'Register' button, which is also highlighted with a red box.

8. Click API Permissions

The screenshot shows the Microsoft Azure 'Lamna Healthcare' app overview page. The left sidebar has sections like 'Overview', 'Quickstart', 'Integration assistant', 'Manage' (which is expanded), 'Branding', 'Authentication', 'Certificates & secrets', 'Token configuration', 'API permissions' (highlighted with a red box), 'Expose an API', and 'App roles'. The main area shows the app's name 'Lamna Healthcare' with a blue icon.

9. Click **Add a permission**.

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (1)				...
User.Read	Delegated	Sign in and read user profile	No	...

10. Select **Microsoft Graph**.

Request API permissions

Select an API

[Microsoft APIs](#) [APIs my organization uses](#) [My APIs](#)

Commonly used Microsoft APIs

Microsoft Graph



Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Azure AD, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.

11. Select **Application Permissions** and search for "Calendar". Expand **Calendars** and select **Calendars.ReadWrite**. Click **Add permissions**.

Request API permissions

Microsoft Graph
<https://graph.microsoft.com/> [Docs](#)

What type of permissions does your application require?

Delegated permissions
Your application needs to access the API as the signed-in user.

Application permissions
Your application runs as a background service or daemon without a signed-in user.

Select permissions

Calendar

Permission	Admin consent required
Calendars.Read	Yes
Calendars.ReadWrite	Yes

Add permissions Discard

12. Click Grant admin consent for the Tenant

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission Grant admin consent for Lamna Healthcare

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (2)				...
Calendars.ReadWrite	Application	Read and write calendars in all mailboxes	Yes	⚠️ Not granted for Lamna ... ⋮
User.Read	Delegated	Sign in and read user profile	No	⋮

13. Click Yes to see the granted permissions.

Grant admin consent confirmation.

Do you want to grant consent for the requested permissions for all accounts in Lamna Healthcare? This will update any existing admin consent records this application already has to match what is listed below.

Yes No

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission Grant admin consent for Lamna Healthcare

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (2)				...
Calendars.ReadWrite	Application	Read and write calendars in all mailboxes	Yes	✓ Granted for Lamna Heal... ⋮
User.Read	Delegated	Sign in and read user profile	No	✓ Granted for Lamna Heal... ⋮

14. Obtain the Secret value by clicking **Certificates and secrets** on the left navigation. Then click **+ New client secret**.

Home > Lamna Healthcare > Lamna Healthcare - Microsoft Teams Identity

Lamna Healthcare - Microsoft Teams Identity | Certificates & secrets ⌂ ⋮

Search (Ctrl+ /) Got feedback?

Overview Quickstart Integration assistant

Branding Authentication Certificates & secrets Token configuration API permissions Expose an API App roles Owners Roles and administrators | Preview Manifest Support + Troubleshooting

Credentials enable confidential applications to identify themselves to the authentication service when receiving tokens at a web addressable location (using an HTTPS scheme). For a higher level of assurance, we recommend using a certificate (instead of a client secret) as a credential.

Certificates

Certificates can be used as secrets to prove the application's identity when requesting a token. Also can be referred to as public keys.

Upload certificate

Thumbprint	Start date	Expires	Certificate ID
No certificates have been added for this application.			

Client secrets

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value	Secret ID
No client secrets have been created for this application.			

15. Enter “**Lamna Healthcare – Microsoft Teams Identity secret**” for the Description and then click **Add**.

The screenshot shows a modal dialog titled "Add a client secret". It has two input fields: "Description" containing "Lamna Healthcare - Microsoft Teams Identity secret" and "Expires" set to "Recommended: 6 months". At the bottom are "Add" and "Cancel" buttons, with "Add" being highlighted by a red box.

16. Copy the **Secret Value** and save for later.

Client secrets			
Description	Expires	Value	Secret ID
Lamna Healthcare - Microsoft Teams Identity secret	3/14/2022	6gM7Q~jyboPj~J5KYiK4G~BqDBwfB0PC...	09c059aa-a420-42b3-b047-4f8541ece861

17. Return to the Application main page, copy the **Application ID** and save for later use.

The screenshot shows the Microsoft Azure application main page. In the navigation bar, "Certificates & secrets" is selected under "Lamna Healthcare". The page title is "Lamna Healthcare - Microsoft Teams Identity | Certificates & secrets".

Microsoft Azure

Search resources, services, and docs (G+/)

Home > Lamna Healthcare >

Lamna Healthcare - Microsoft Teams Identity

Search (Ctrl+ /) Delete Endpoints Preview features

Overview Quickstart Integration assistant

Manage Branding Authentication

Essentials

Display name : Lamna Healthcare - Microsoft Teams Identity

Application (client) ID : 43e084fd-7a37-4154-8db1-1aa82c3e7edb

Object ID : 5e0455dc-a38c-4c60-9170-b228c92685e6

Directory (tenant) ID :

Supported account types : My organization only

18. Return to make.powerapps.com tab and enter **both** the **Secret** and **Application IDs** that you copied.

Environment variables

value, then it will try to pull a defined value.
Definition: The Shared Access Key Name that is used when communicating with the Service Bus.

Virtual Appointment URL Domain
Enter text The domain of the portal for button links in HTML emails

Entity Updater Service Bus URI
Enter text **Important**: Do not delete this environment variable or change the Schema Name. This is used by internal logic. Note: The internal logic will first try to pull the default value. If it does not find a default value, then it will try to pull a defined value.
Definition: This represents the URL used for the Service Bus that will receive JSON based CDS record changes. Example: mservicebus.servicebus.windows.net

Virtual Visit Secret
09c059aa-a420-42b3-b047-4f8541ece8... This is the secret used for the Virtual Visit Client ID. It is used to authenticate against the Microsoft Graph for scheduling of the Virtual Visit.

Virtual Visit Client ID
43e084fd-7a37-4154-8db1-1aa82c3e7e... The client ID used to authenticate against the Microsoft Graph API. This identity is used to generate the actual virtual visit.

Save and close **Cancel**

19. Finally, enter the email address of your logged in user into the Virtual Appointment Scheduler Email field.

Environment variables

Virtual Appointment Scheduler Email

allencontoso@lamnahealthcaretesttrainin

20. Click **Save and close**.

Save and close

Cancel

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

Task 6: Activate Flows and Connection References

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

1. Navigate to make.powerapps.com.
2. Click **Solutions** and then click **+ New Solution**.

The screenshot shows the Power Apps interface with the 'Solutions' tab selected. A red box highlights the 'Solutions' button in the left sidebar. Another red box highlights the '+ New solution' button at the top of the main content area. A warning message '8 environment variables need to be updated. See environment variables' is displayed above the solution list. The table below lists several sample solutions, each with a red box around its name.

Display name	Name	Created	Version
Healthcare - Patient Access Portal Sample Data	HealthcarePatientAc...	8/27/2021	2.1.3.1
Healthcare - Home Health Sample Data	HealthcareHomeHea...	8/27/2021	2.1.3.1
Healthcare - Codeable Concepts Sample Data	HealthcareCodeable...	8/27/2021	2.1.3.1
Healthcare - Patient Outreach Sample Data	HealthcarePatientOu...	8/27/2021	2.1.3.10
Healthcare - Patient Access Portal	HealthcarePatientAc...	8/27/2021	2.1.3.1
Healthcare - Patient Access Anchor	HealthcarePatientAc...	8/27/2021	2.1.3.1

3. Name the solution "LamnaHealthCare", choose the **Default Publisher** and click **Save**

New solution

Display name *

Name *

Publisher *

 ▼

+ New publisher

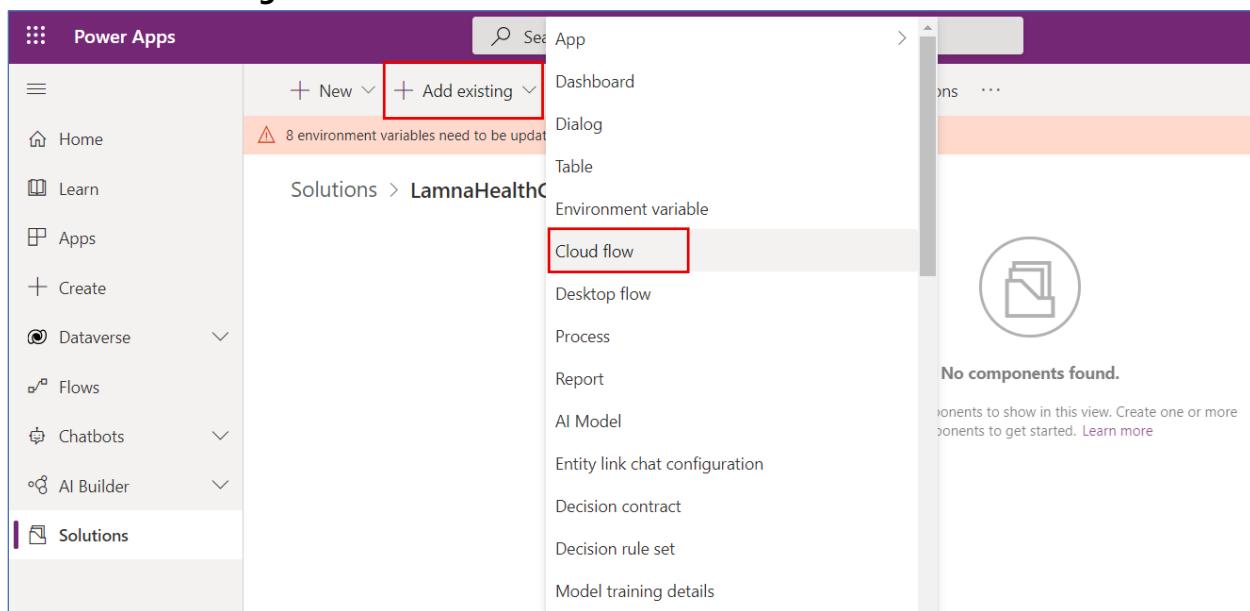
Version *

More options ▾

Create

Cancel

4. Click **+ Add existing** and select **Cloud flow**.



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

Add existing cloud flows

Select cloud flows from other solutions or cloud flows that aren't in solutions yet. Adding cloud flows that aren't already in solutions will also add them to Dataaverse.

1 cloud flow selected

From Dataverse Outside Dataaverse

Display name	Modified	Managed externally?	Status
BookedHomeVisitNotification_Traveling v2	2 wk ago	Off	
BookingCompletion_CloseWorkOrder v2	2 wk ago	Off	
<input checked="" type="checkbox"/> CF -> Schedule Teams Meeting for instant and virtual, update record with url and status booked	2 wk ago	Off	
CF -> Send email for appointment	2 wk ago	On	
CreateCase_WhenFollowUpNeeded v2	2 wk ago	Off	
Entity records distribution flow	2 wk ago	On	
Entity records distribution flow - backup [8/27/2021 7:11:11 AM]	2 wk ago	Off	
Entity records distribution flow - backup [8/27/2021 7:11:11 AM]	2 wk ago	Off	
FL -> Update Service Attribute Maps -> Bulk Update ...	2 wk ago	Off	
Health Check in - Survey Mapping Flow	2 wk ago	Off	

Add Cancel

6. Select and open the Cloud flow.

New Add existing Remove Edit See Analytics ...

All Search

⚠ 8 environment variables need to be updated. See environment variables

Solutions > LamnaHealthCare

Display name	Name	Type	Managed...	Modified	Owner	Status
<input checked="" type="checkbox"/> CF -> Schedule Teams Meeting for instant and virtual, update record with url and status booked	CF -> Schedule Teams Meeting for instant and virtual, update record with url and status booked	Cloud flow	Off	2 wk ago	Allen Contoso	Off

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

Power Automate

Flows > CF -> Schedule Teams Meeting for instant and virtual, update record with url and status booked

Details

Flow: CF -> Schedule Teams Meeting for instant and virtual, update record with url and status to booked

Status: Off

Created: Aug 27, 03:02 PM

Modified: Aug 27, 03:02 PM

Type: Automated

Plan: Per-user plan

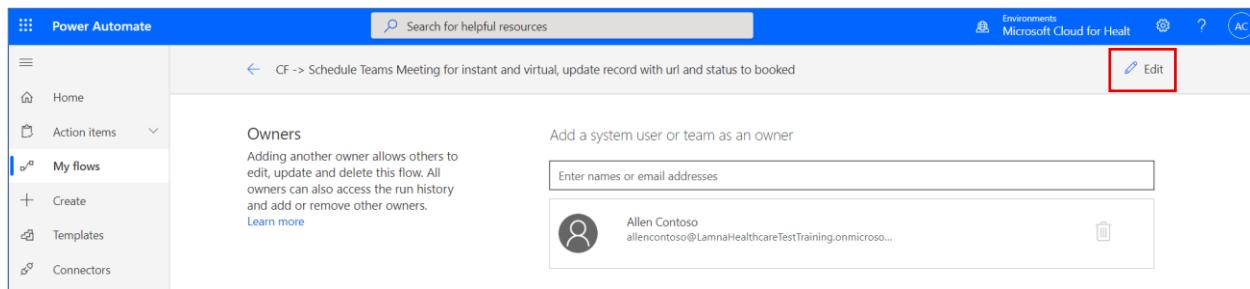
Connection References

There aren't any connection references for this flow.

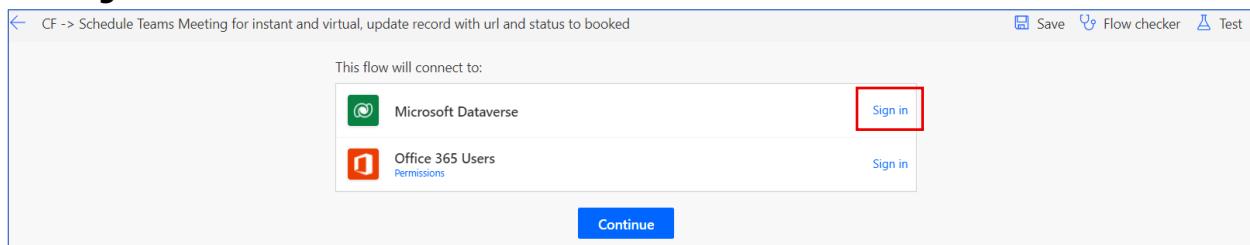
Owners

Allen Contoso

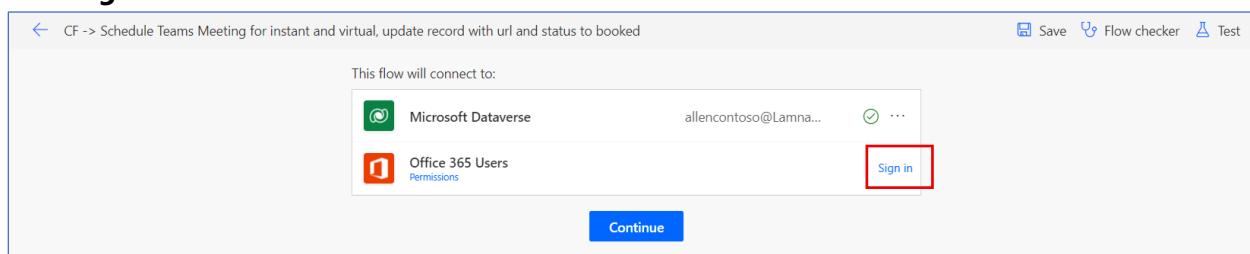
8. Click **Edit**.



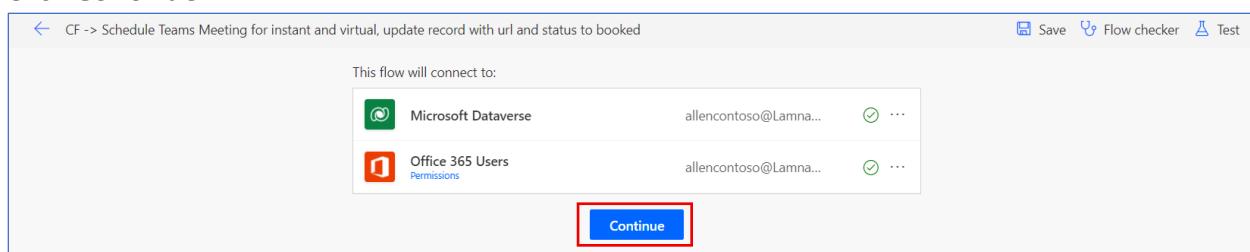
9. Click **Sign in for Microsoft Dataverse** to create the Connection Reference.



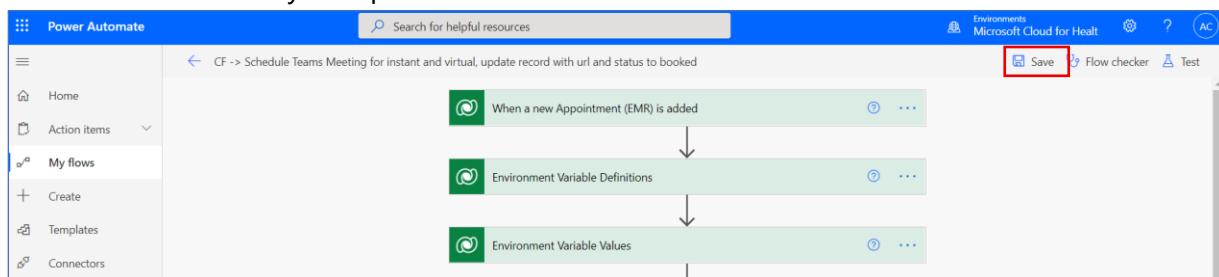
10. Click **Sign in for Office 365 Users** to create the Connection Reference.



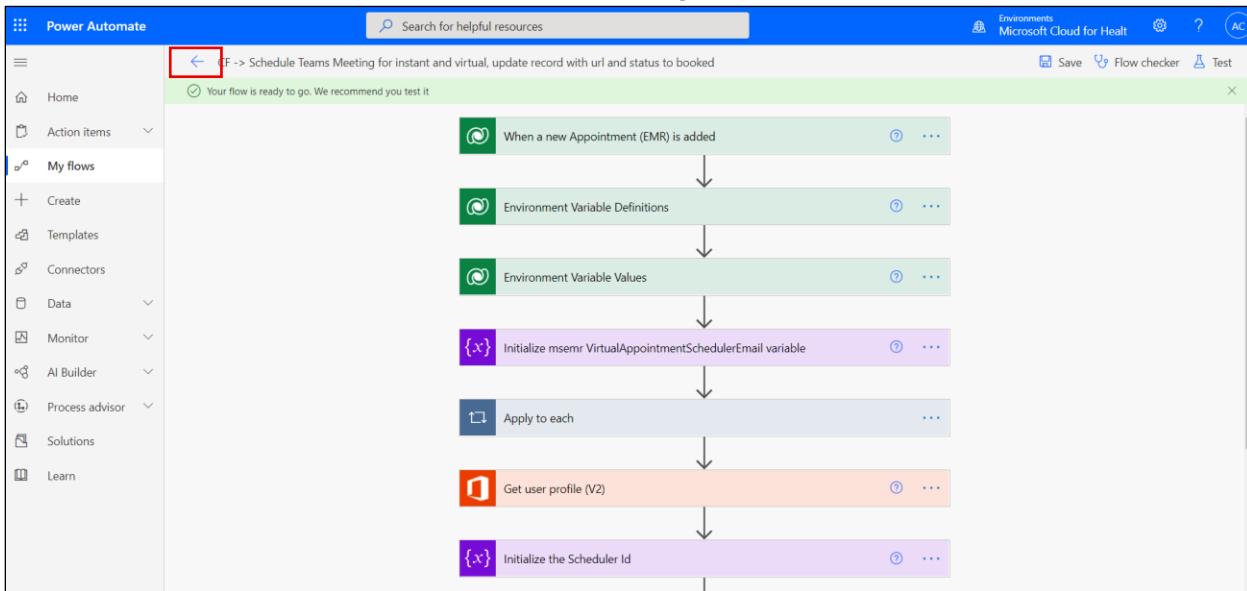
11. Click **Continue**



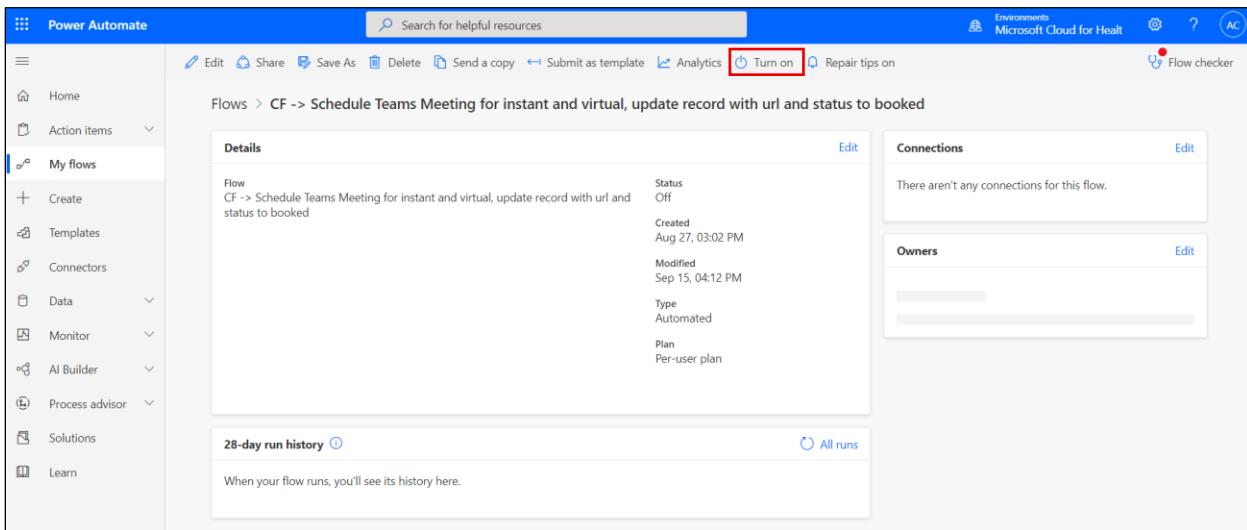
12. Click **Save** to commit your updates.



13. Click the **Back arrow** to return to the flow's main page



14. Click Turn on to turn on the flow



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

Exercise 2: Configure Microsoft Teams for Virtual Visits

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

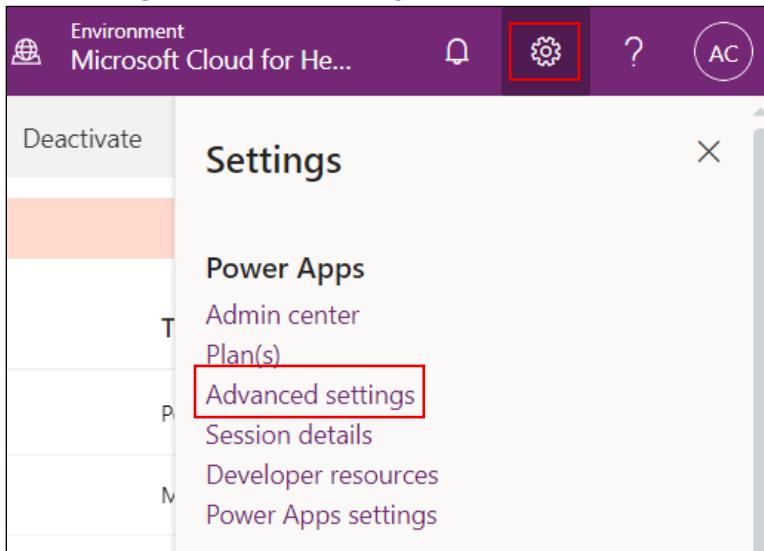
Additionally, your care team can use Microsoft Teams internally to do the following:

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

Task 1: Install and Set up Microsoft Teams Integration

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

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

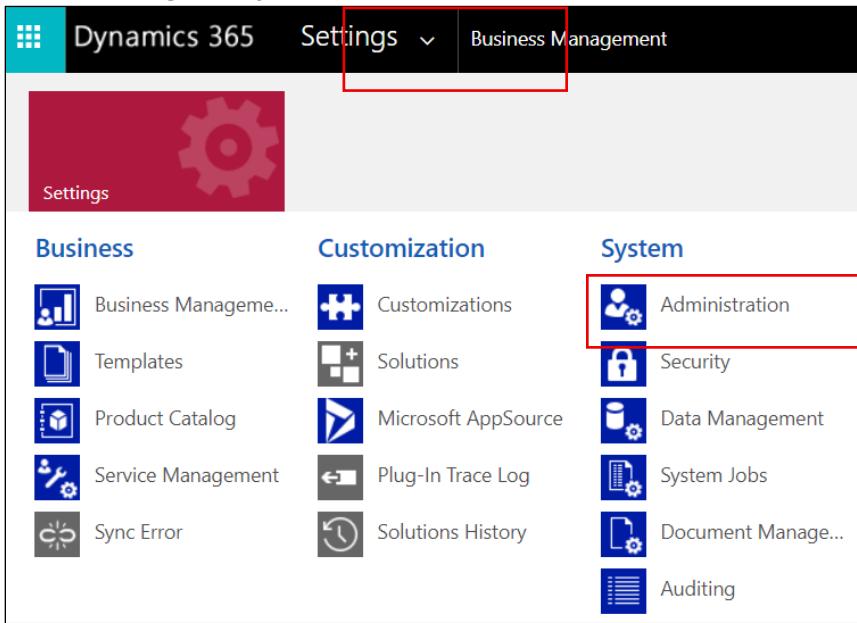


3. You will be landed in Dynamics 365 Business Management section.

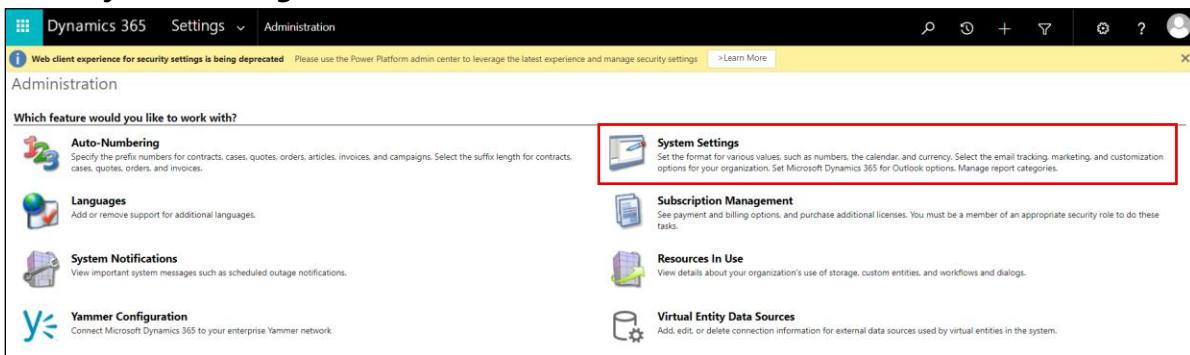
A screenshot of the Dynamics 365 Business Management section. The top navigation bar includes a grid icon, 'Dynamics 365', 'Settings' (with a dropdown arrow), and 'Business Management'. The main content area is titled 'Business Management' and contains a heading 'Which feature would you like to work with?'. Below this are three cards:

- Fiscal Year Settings**: Set the start date, template, and display options for the fiscal year and fiscal period used for tracking sales goals.
- Business Closures**: Create a list of holidays and other times when the business is closed.
- Queues**: Create and manage service queues, and manage the membership of private queues. Establish criteria for automatic record creation and updates.

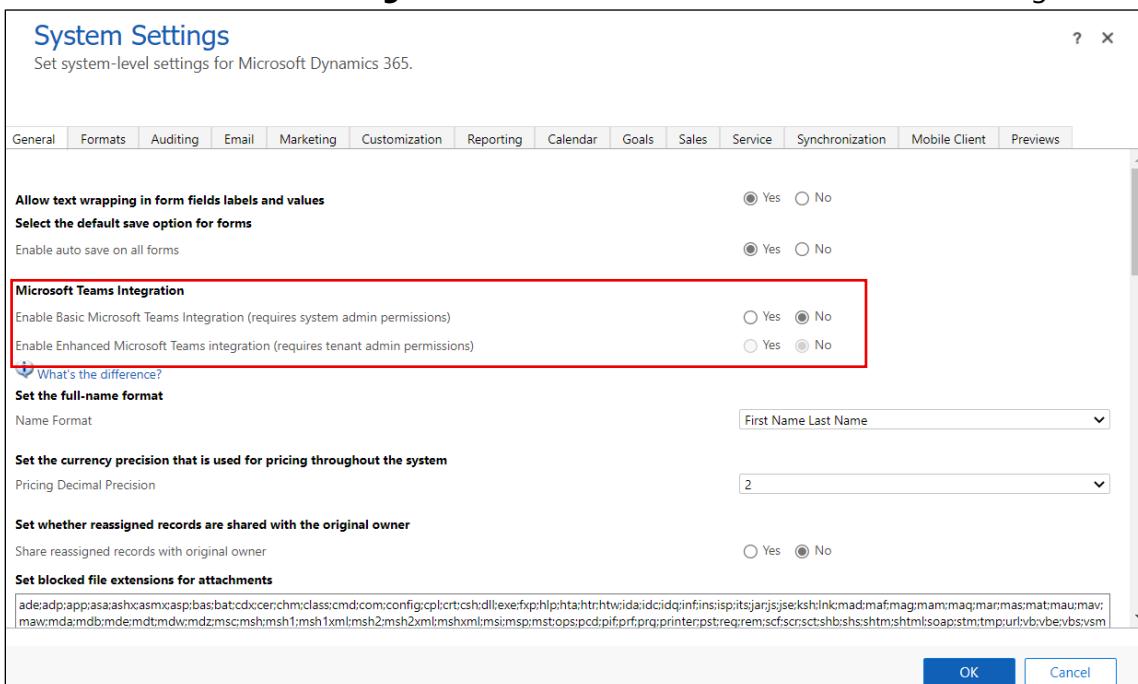
4. Go to **Settings** → **System** → **Administration**.



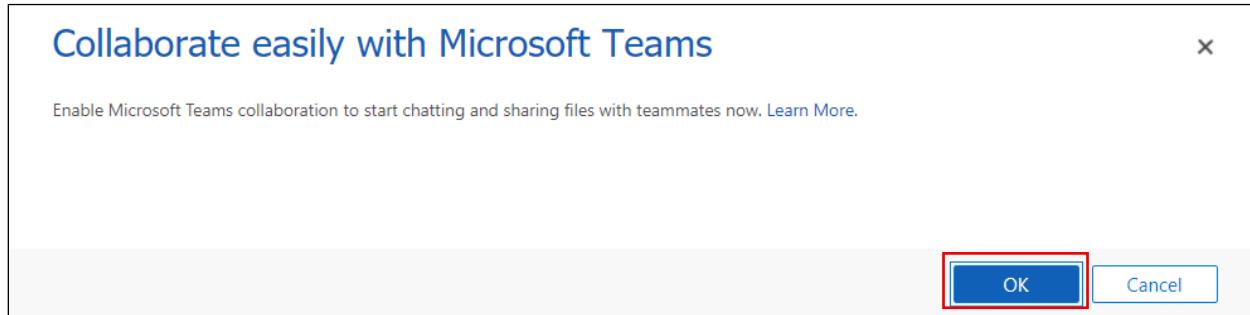
5. Select **System Settings**.



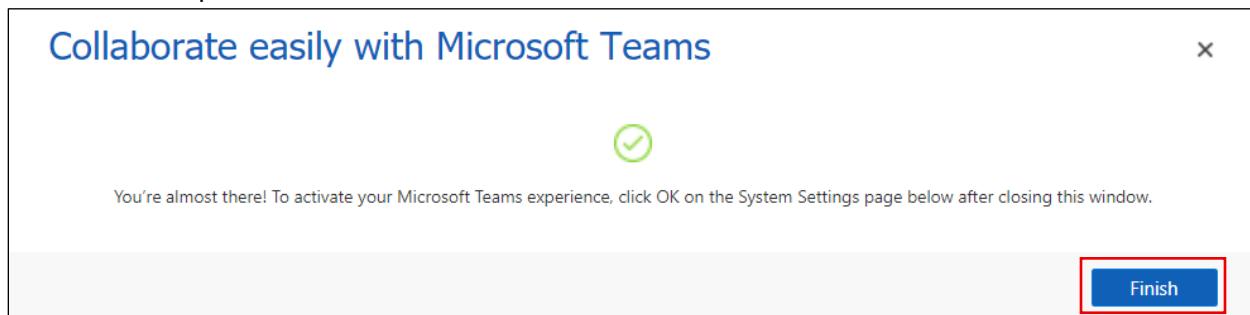
6. Under **Microsoft Teams Integration**, switch Enable **Basic Microsoft Teams Integration** over to **Yes**.



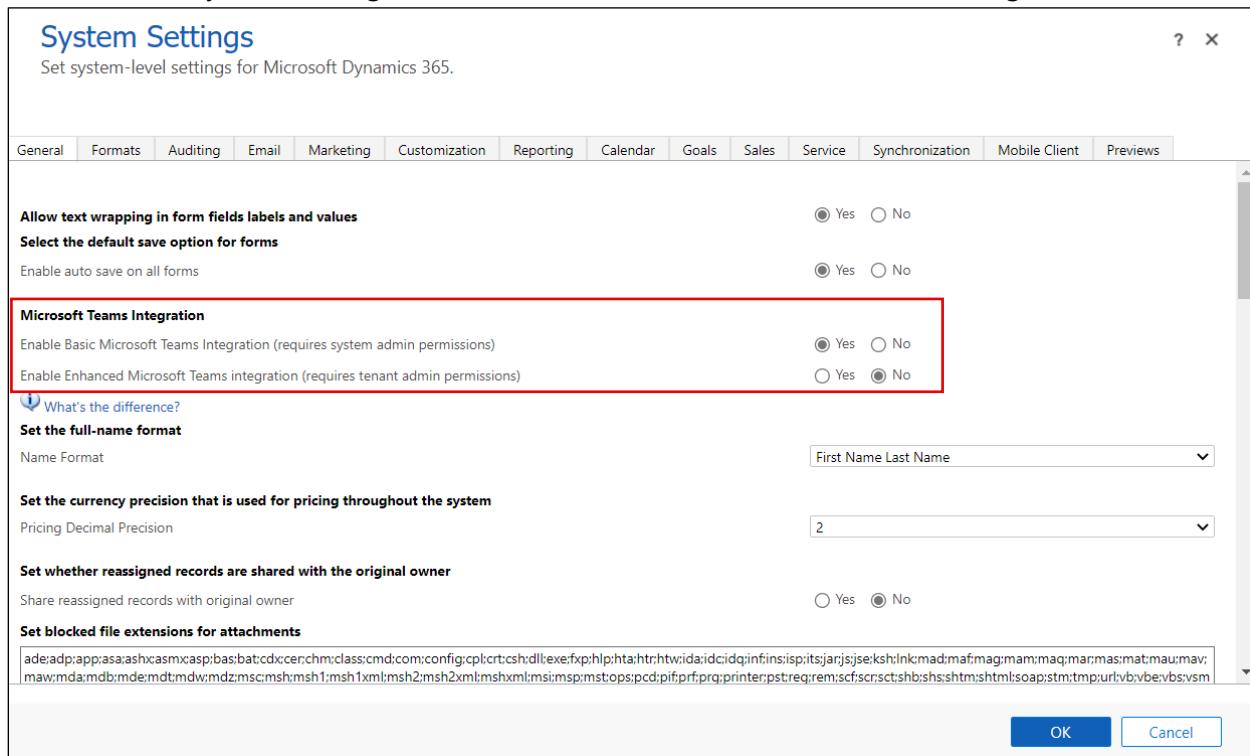
7. When the pop-up opens, click **OK**. This will take several minutes to configure.



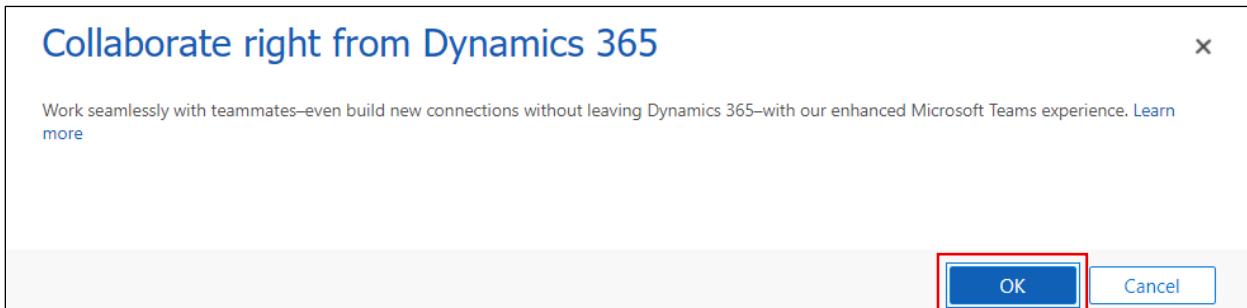
8. When it is completed, click **Finish**.



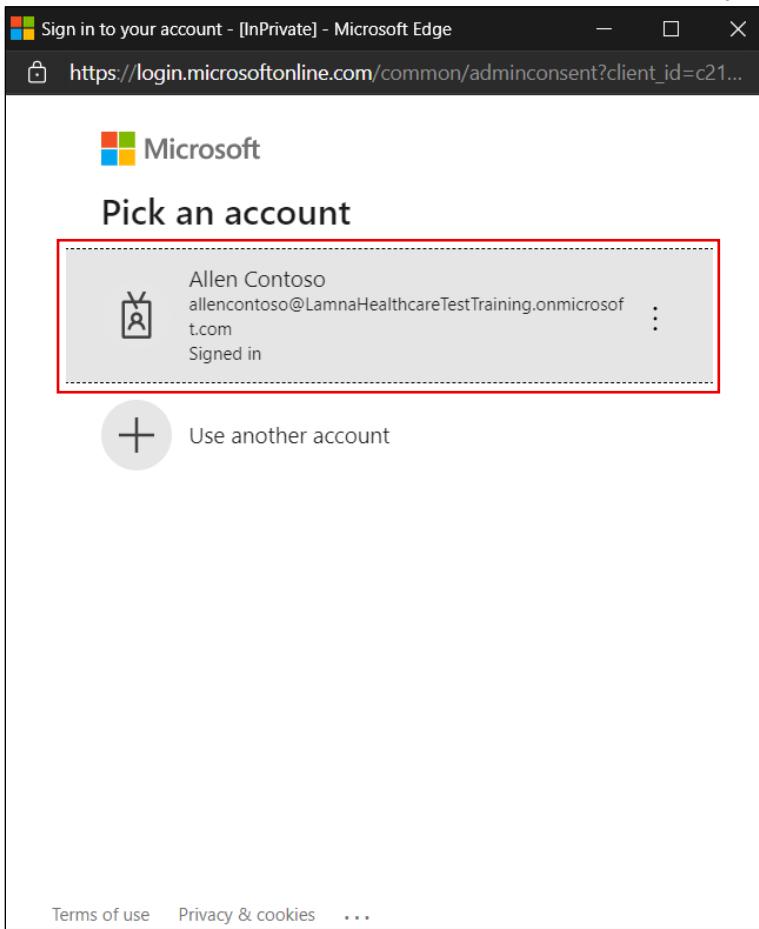
9. Once back on System Settings, switch Enable **Enhanced** Microsoft Teams integration to **Yes**.



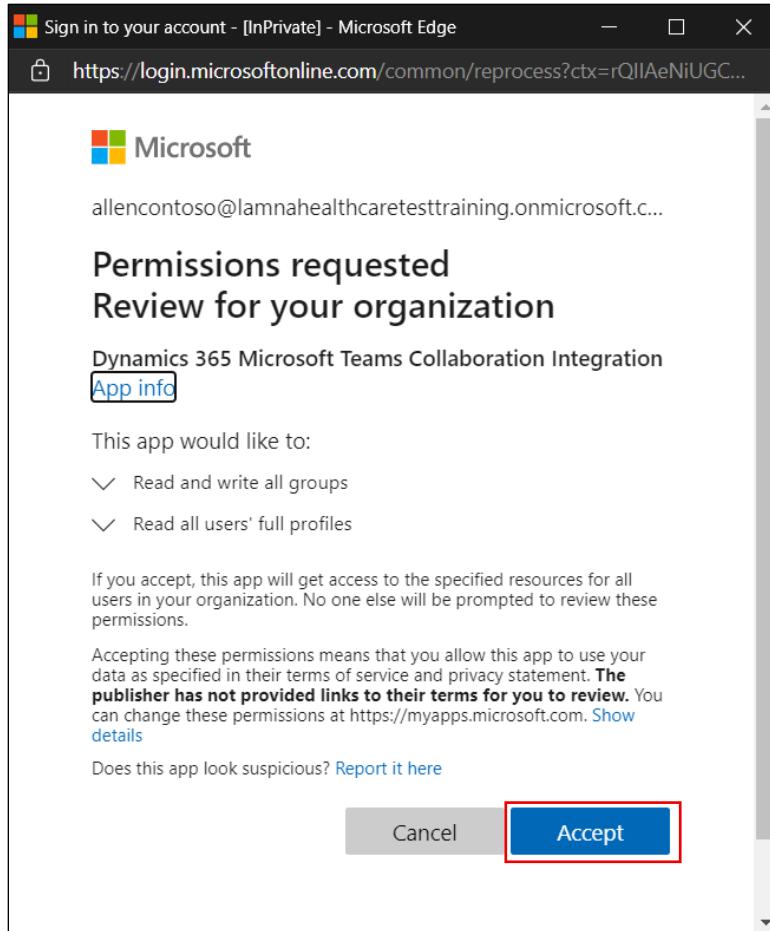
10. When the pop-up opens, click **OK**



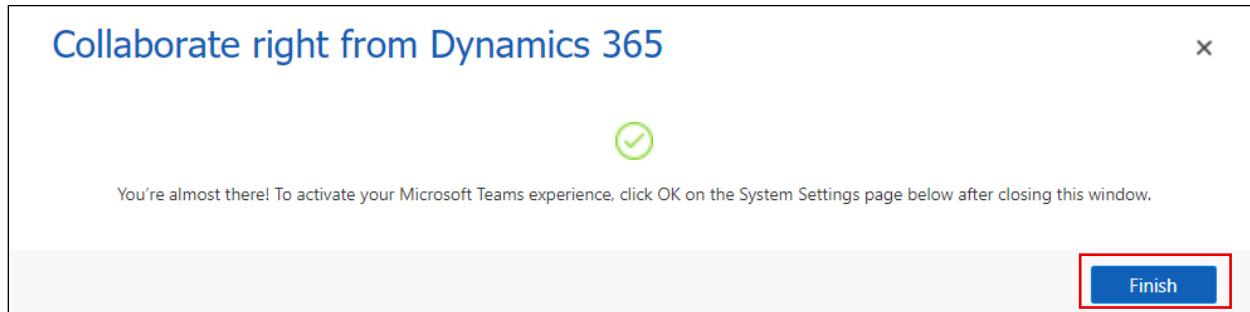
11. Another pop-up window will open. Select the user that you are signed in as currently.



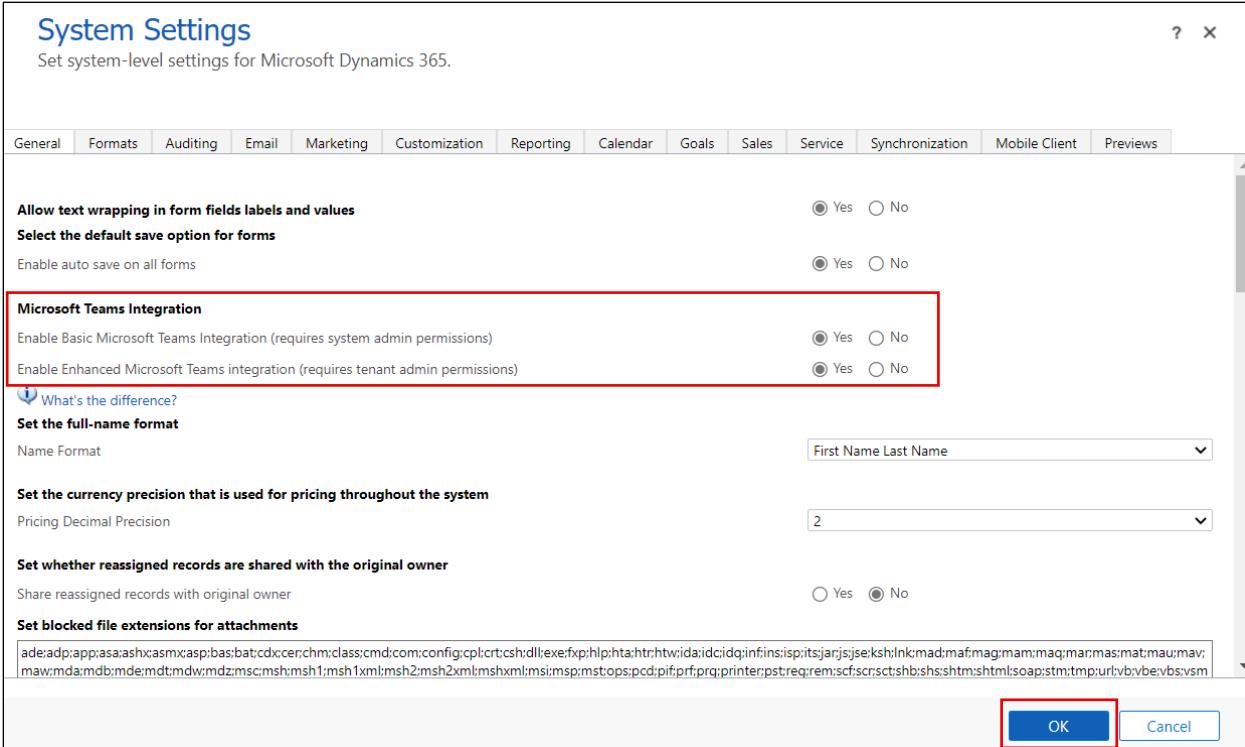
12. Click **Accept**.



13. Click **Finish**.



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



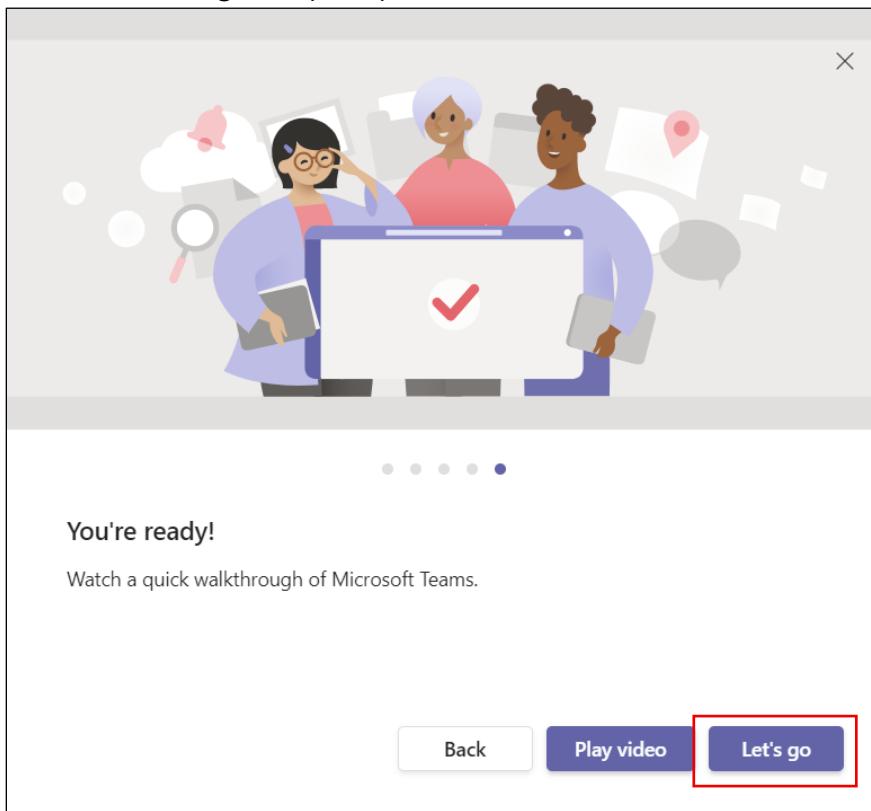
Congratulations! You have enabled Microsoft Teams integration for Dynamics 365.

Task 2: Embed Virtual Clinic App in Microsoft Teams

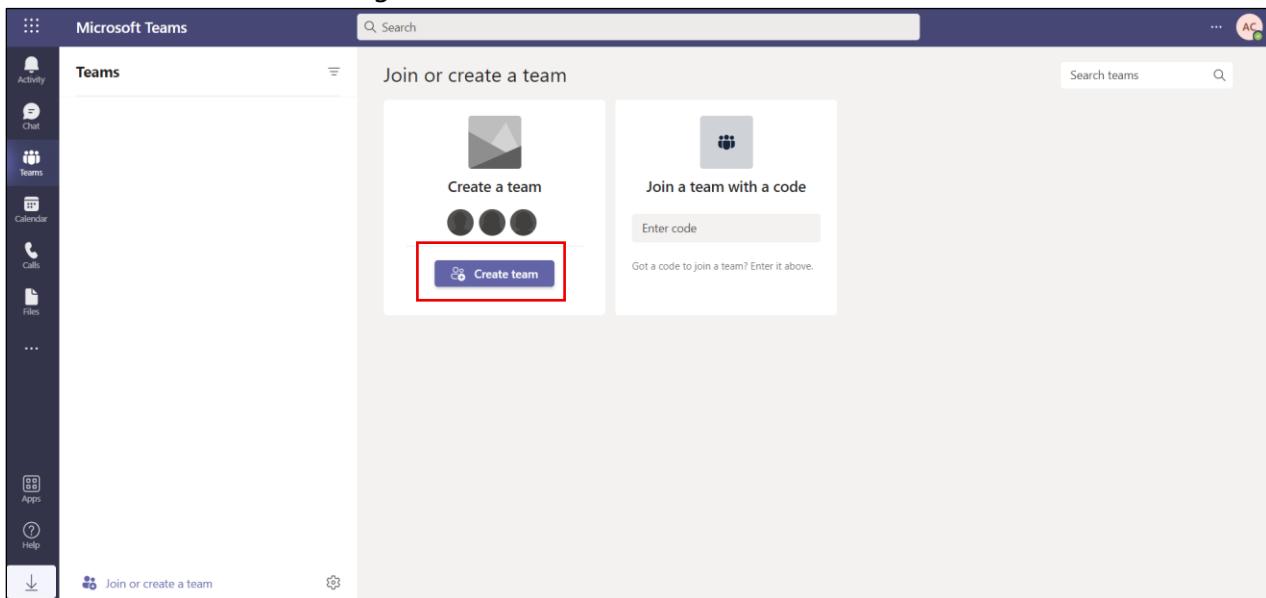
In this task, you will customize the Microsoft Teams experience for a practitioner by embedding the Virtual Clinic app to the Teams channel in your environment*.

*We will be utilizing the Microsoft Teams web experience for this task.

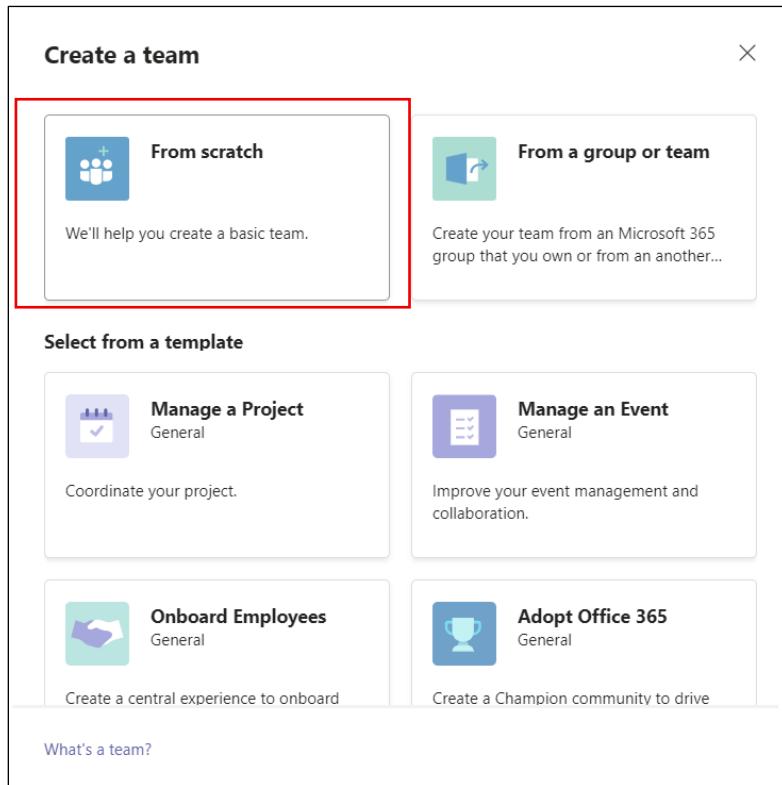
1. While logged in to your Microsoft 365 tenant, open a new tab and go to teams.microsoft.com.
2. Click **Next** through the prompts, and then click **Let's Go**.



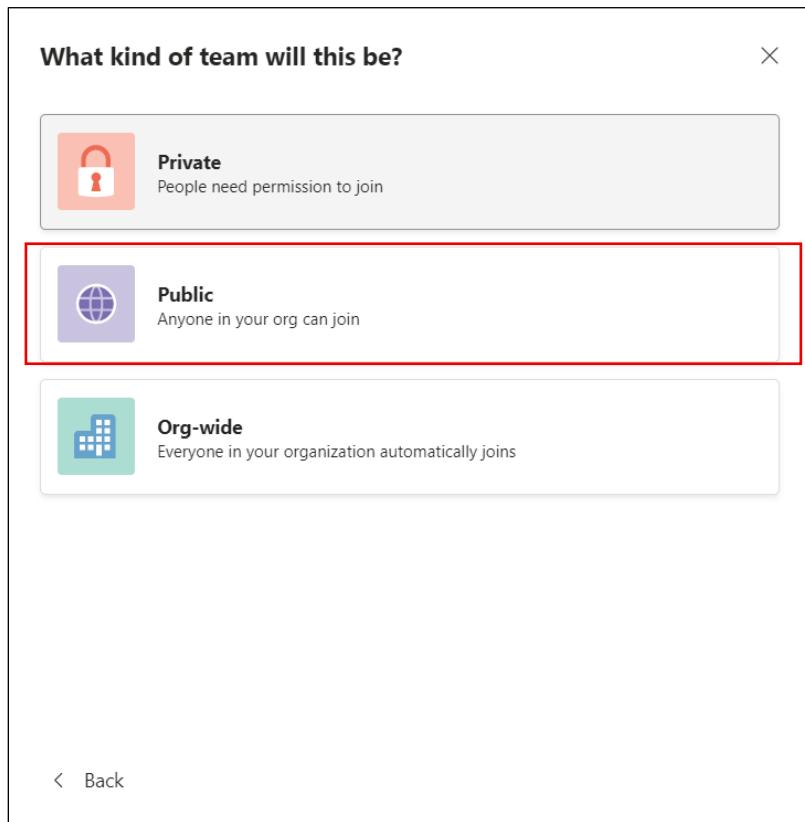
3. Select Teams on the left navigation bar and then click **Create Team**.



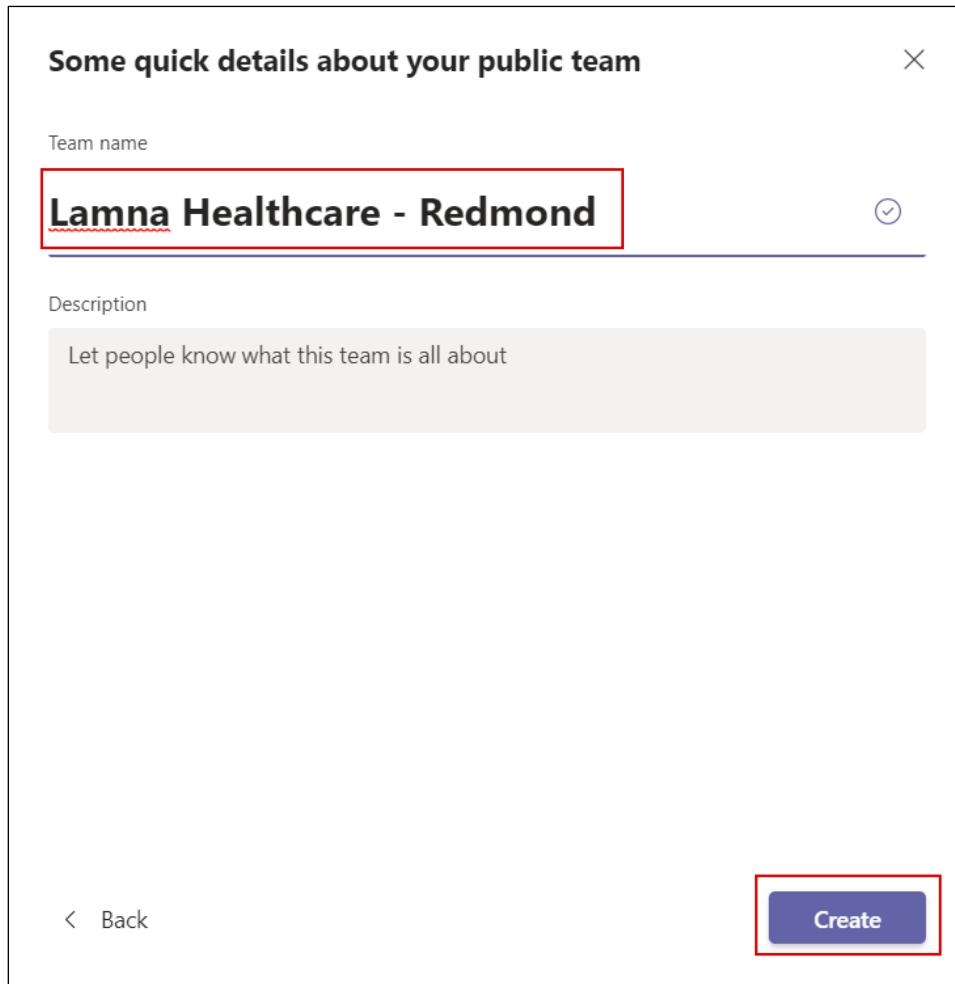
4. Click **From scratch**.



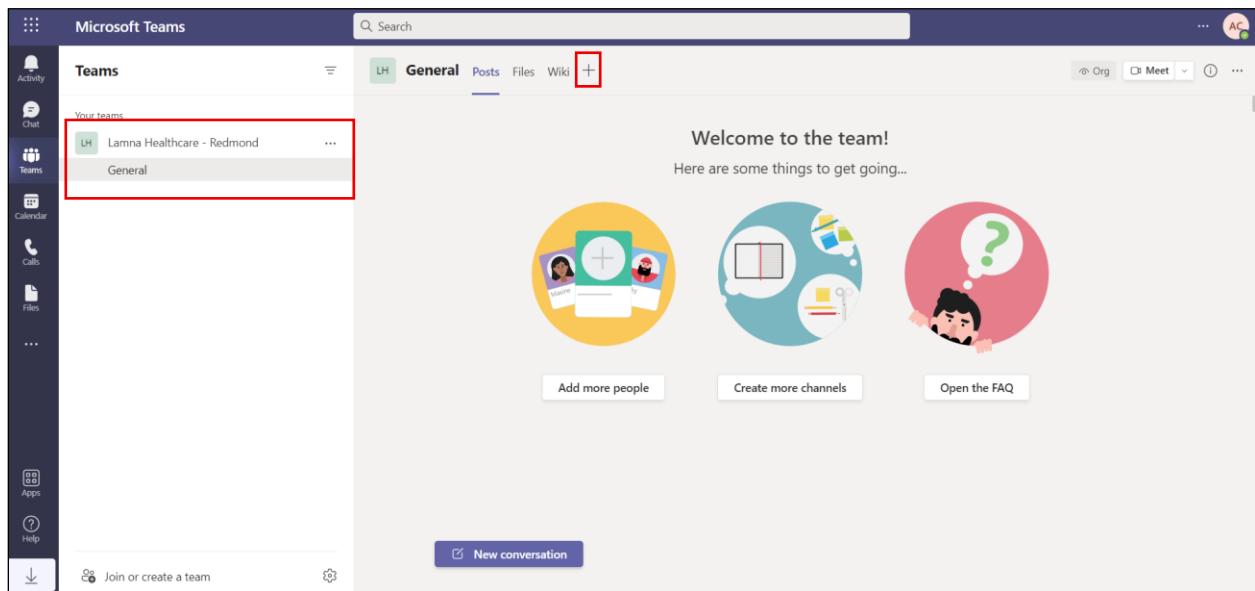
5. Click Public.



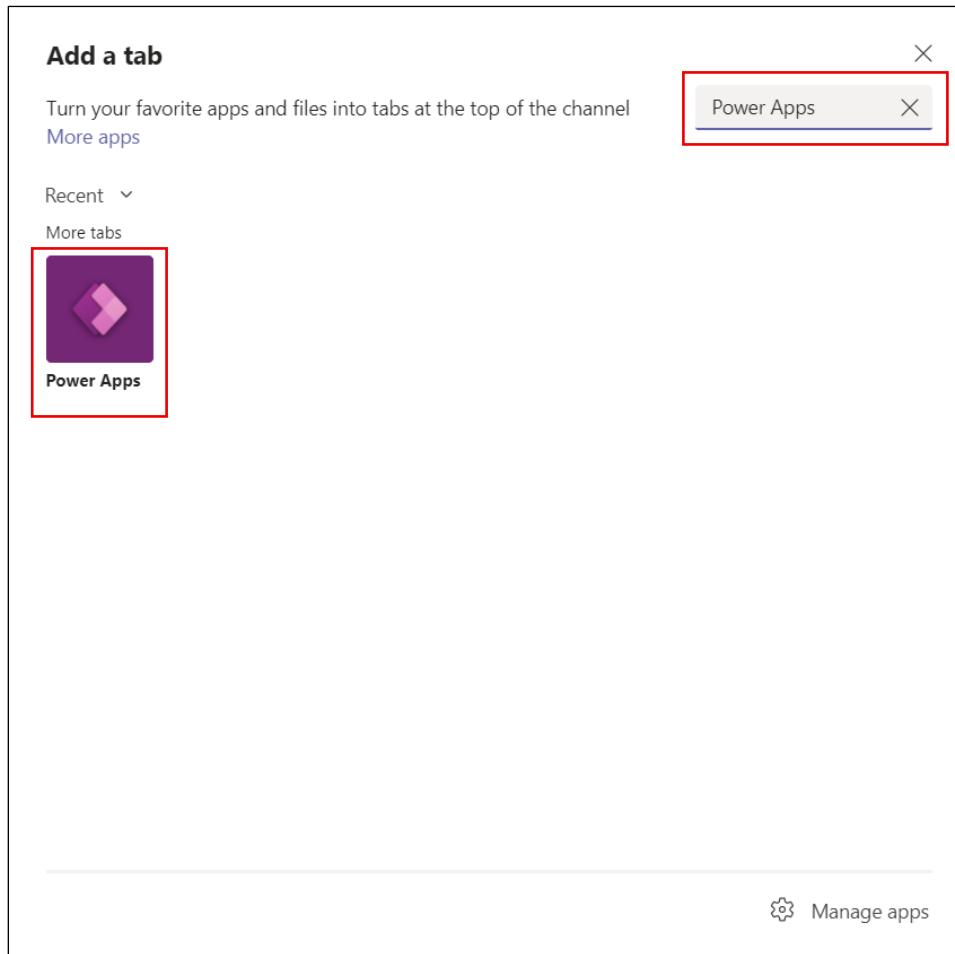
6. Call the Team "**Lamna Healthcare – Redmond**" and click Create.



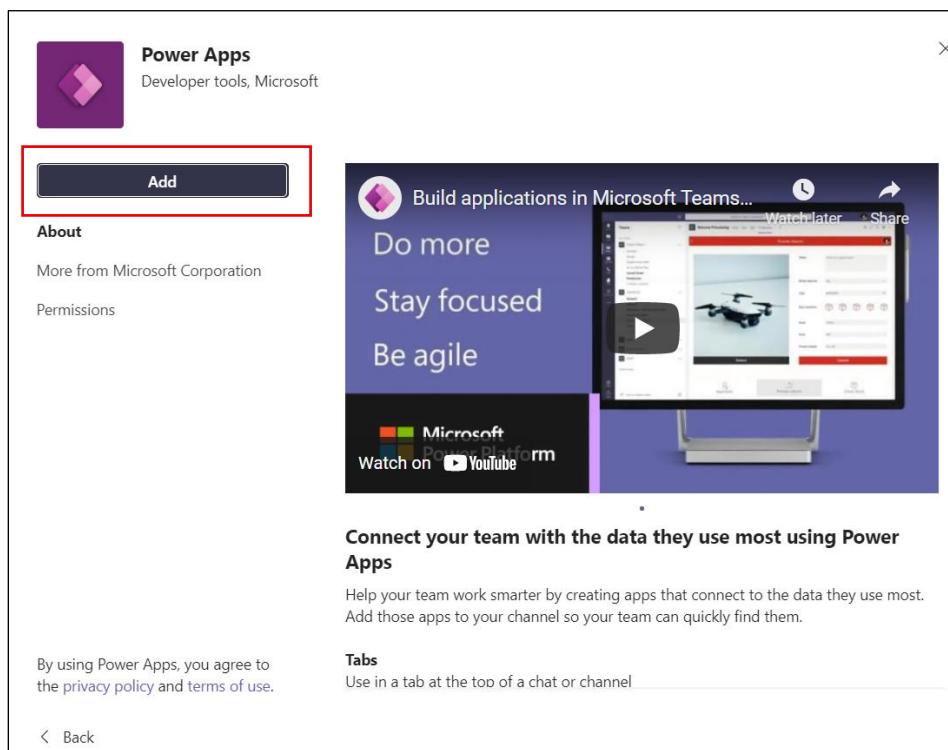
7. Once the Team is created and the **General channel** selected, click the **+** button to add a tab



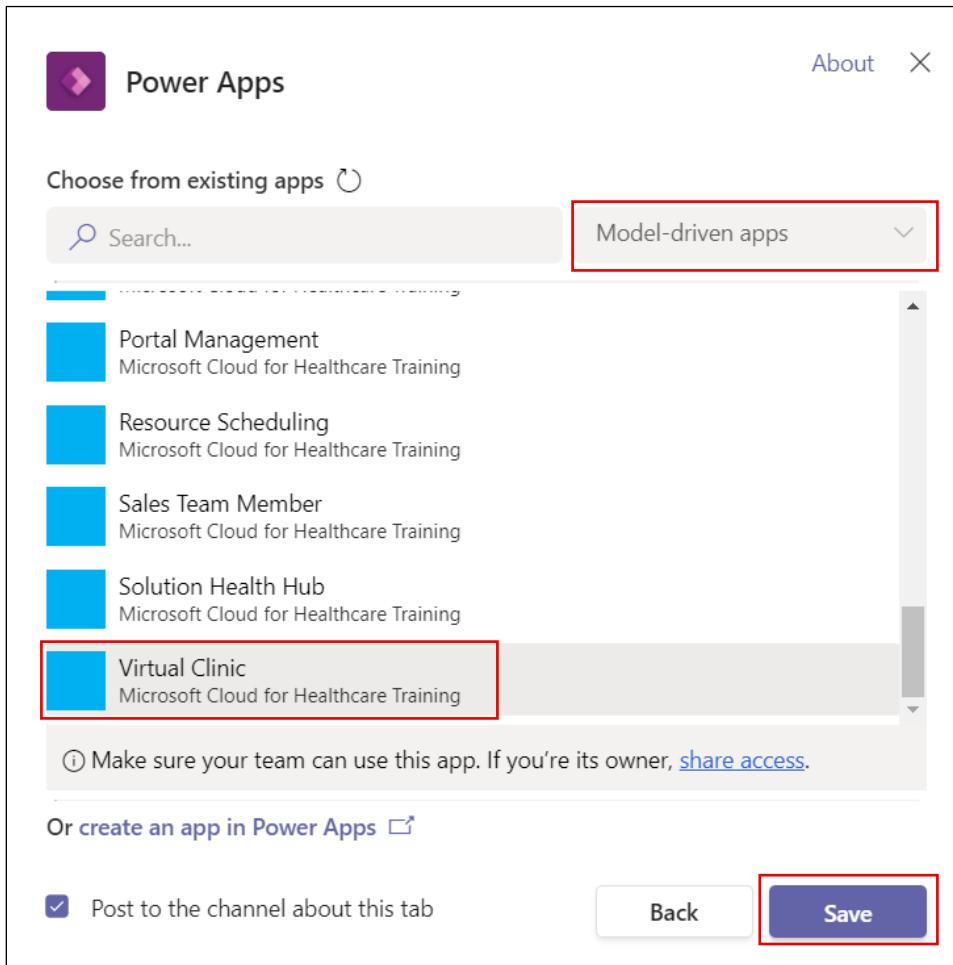
8. Search for "Power Apps" and select **Power Apps**



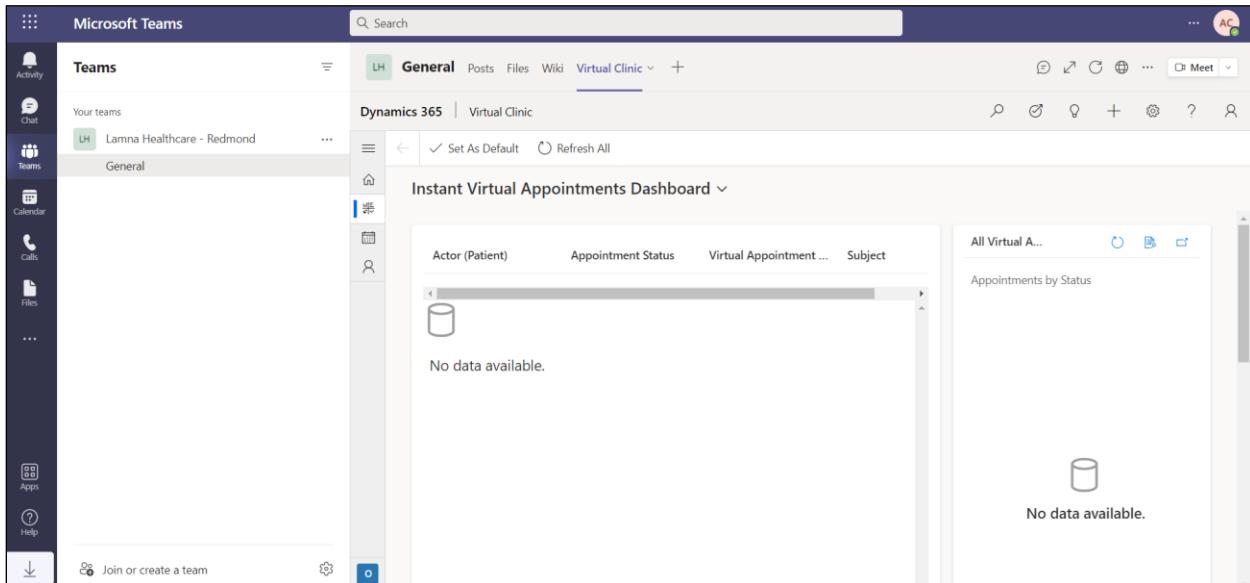
9. Click **Add**



10. Select **Model-driven apps** from the dropdown menu, then scroll down and select **Virtual Clinic** and click **Save**.



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



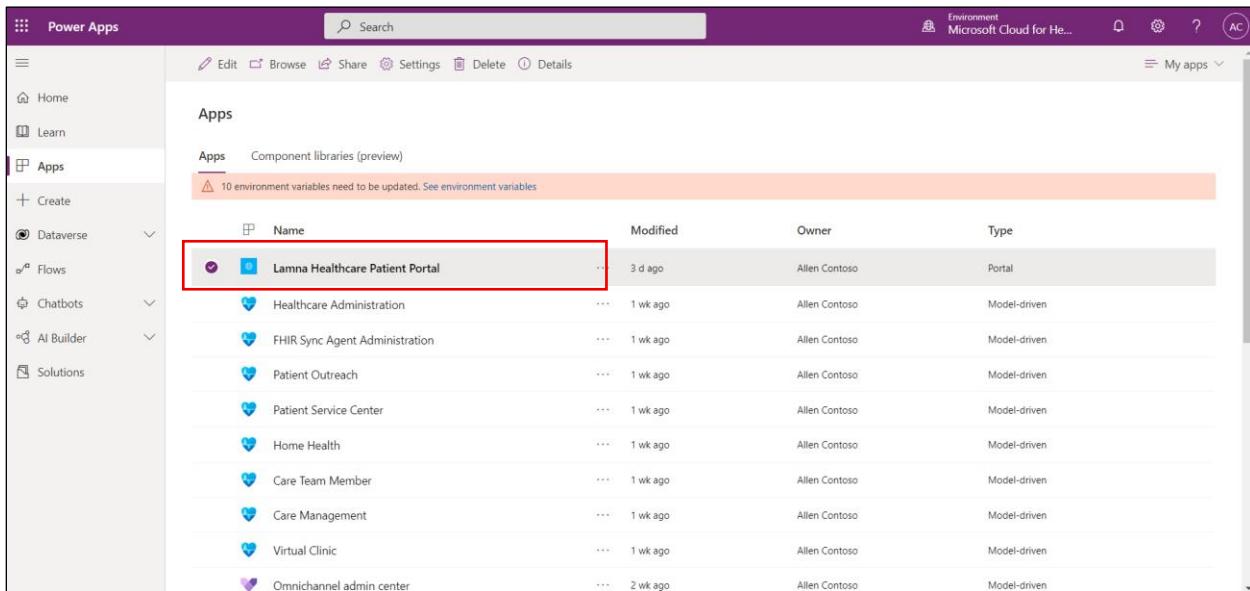
Exercise 3: Schedule a Virtual Visit

In this final exercise, you will use the items that you configured in the previous exercises to schedule a virtual visit between Adam Atkins and his practitioner, Jamie Evans.

Task 1: Schedule an Instant Virtual Appointment

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

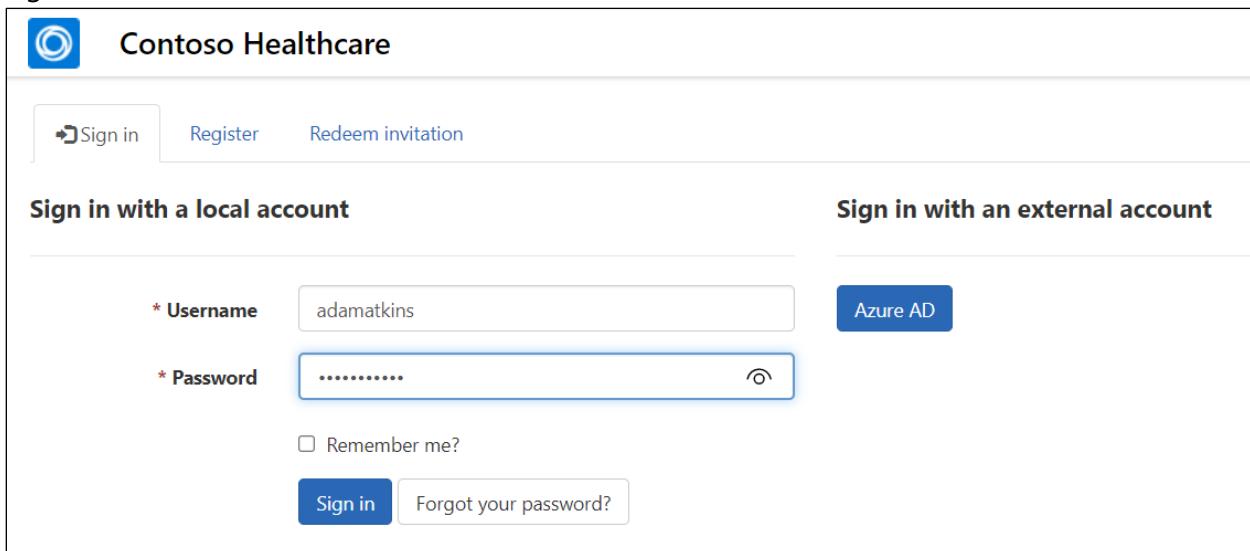
1. Go to make.powerapps.com
2. Go to Apps and open the Lamna Patient Portal



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, Chatbots, AI Builder, and Solutions. The main area is titled 'Apps' and shows a list of available apps. A red box highlights the first item in the list: 'Lamna Healthcare Patient Portal'. Other listed apps include Healthcare Administration, FHIR Sync Agent Administration, Patient Outreach, Patient Service Center, Home Health, Care Team Member, Care Management, Virtual Clinic, and Omnidirectional admin center. Each app entry includes a small icon, the name, the last modified date, the owner (Allen Contoso), and the type (Portal or Model-driven).

Name	Modified	Owner	Type
Lamna Healthcare Patient Portal	3 d ago	Allen Contoso	Portal
Healthcare Administration	1 wk ago	Allen Contoso	Model-driven
FHIR Sync Agent Administration	1 wk ago	Allen Contoso	Model-driven
Patient Outreach	1 wk ago	Allen Contoso	Model-driven
Patient Service Center	1 wk ago	Allen Contoso	Model-driven
Home Health	1 wk ago	Allen Contoso	Model-driven
Care Team Member	1 wk ago	Allen Contoso	Model-driven
Care Management	1 wk ago	Allen Contoso	Model-driven
Virtual Clinic	1 wk ago	Allen Contoso	Model-driven
Omnidirectional admin center	2 wk ago	Allen Contoso	Model-driven

3. Sign in as **Adam Atkins**



The screenshot shows the Contoso Healthcare Patient Portal sign-in page. At the top, there's a logo and the text 'Contoso Healthcare'. Below that, there are two main sign-in options: 'Sign in with a local account' and 'Sign in with an external account'. The 'Sign in with a local account' section is active, featuring fields for 'Username' (containing 'adamatkins') and 'Password' (containing '*****'). There's also a 'Remember me?' checkbox and a 'Sign in' button. To the right, the 'Sign in with an external account' section is visible, with a 'Azure AD' button. At the bottom of the page, there are links for 'Forgot your password?' and 'Sign in'.

Sign in with a local account		Sign in with an external account	
* Username	adamatkins	Azure AD	
* Password	*****		
<input type="checkbox"/> Remember me?			
Sign in		Forgot your password?	

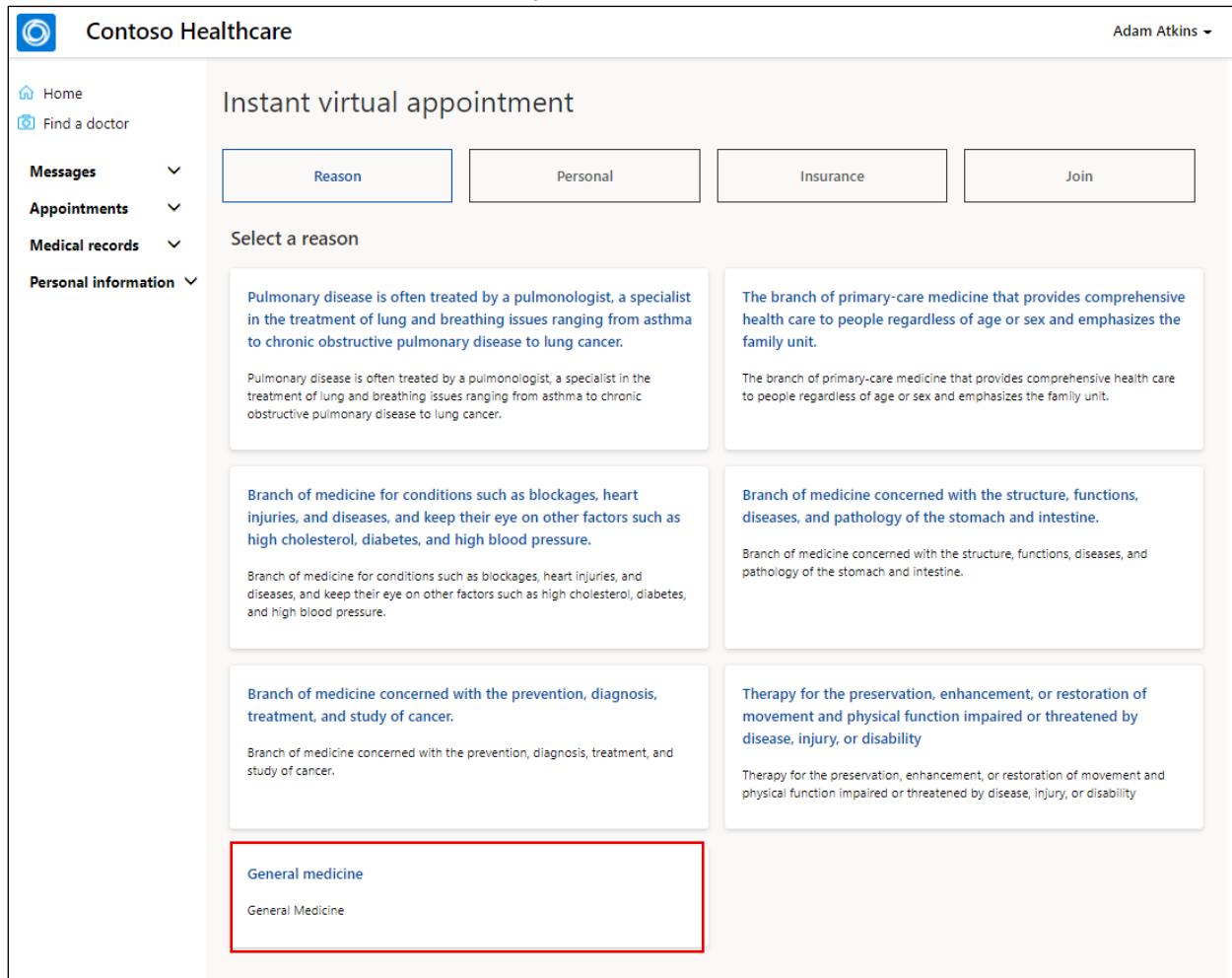
4. Go to **Appointments** and select **Schedule new**.

The screenshot shows the Contoso Healthcare mobile application interface. At the top, there is a header bar with the Contoso Healthcare logo and a user profile for Adam Atkins. On the left side, there is a vertical navigation menu with the following items: Home, Find a doctor, Messages, Appointments (with Upcoming and Schedule new options), Medical records, and Personal information. The 'Schedule new' option under 'Appointments' is highlighted with a red box. The main content area features a 'Welcome Adam Atkins' message and three cards: 'Schedule an appointment' (laptop screen with video call), 'View messages' (woman on phone), and 'Find a doctor' (doctor in white coat). Below these cards are two sections: 'Unread messages' (empty) and 'Upcoming appointments' (empty). To the right, there is a 'Medications' section showing a single entry for Epipen.

5. Select **Instant virtual appointment**.

The screenshot shows the 'Schedule a new appointment' page. The left sidebar has the same navigation as the previous screen. The main content area has three sections: 'Schedule as soon as possible' (highlighting 'Instant virtual appointment' with a red box), 'Or schedule for a specific day and time' (listing 'Virtual appointment' and 'Clinic appointment'). The 'Instant virtual appointment' box contains the following text: 'A video conference call with the next available provider. You must have a smartphone or computer with camera and microphone.'

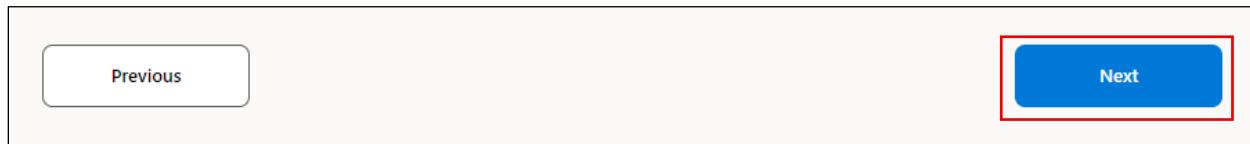
6. Select the **General Medicine** option that you created earlier in the lab as the reason for the visit.



The screenshot shows the Contoso Healthcare website interface for scheduling an instant virtual appointment. On the left, there's a sidebar with links for Home, Find a doctor, Messages, Appointments, Medical records, and Personal information. The main area is titled "Instant virtual appointment". Below it, there are four buttons: "Reason", "Personal", "Insurance", and "Join". The "Reason" button is highlighted with a blue border. A dropdown menu titled "Select a reason" lists several medical specialties:

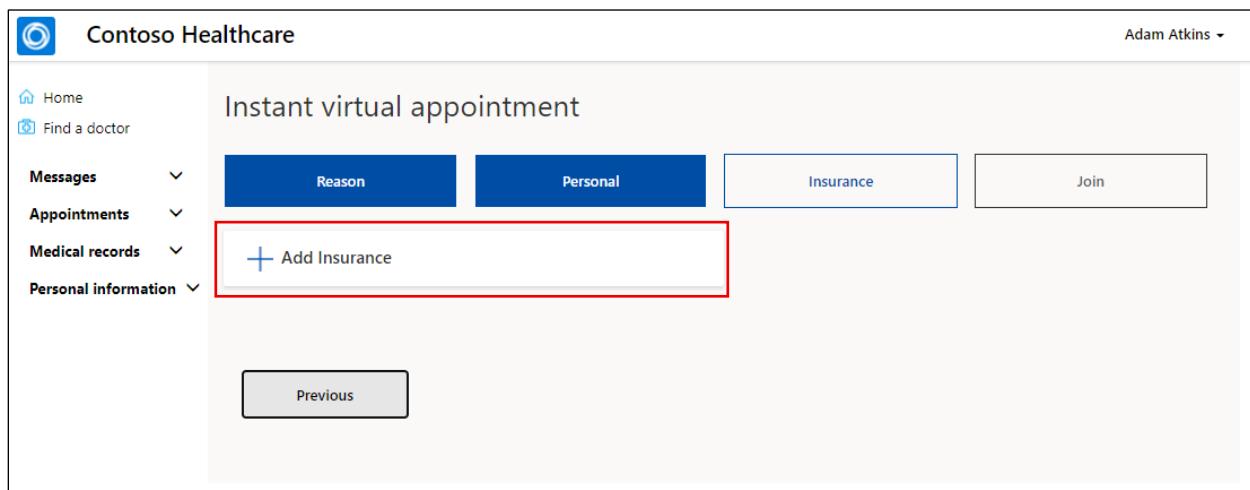
- Pulmonary disease is often treated by a pulmonologist, a specialist in the treatment of lung and breathing issues ranging from asthma to chronic obstructive pulmonary disease to lung cancer.
- The branch of primary-care medicine that provides comprehensive health care to people regardless of age or sex and emphasizes the family unit.
- Branch of medicine for conditions such as blockages, heart injuries, and diseases, and keep their eye on other factors such as high cholesterol, diabetes, and high blood pressure.
- Branch of medicine concerned with the structure, functions, diseases, and pathology of the stomach and intestine.
- Branch of medicine concerned with the prevention, diagnosis, treatment, and study of cancer.
- Therapy for the preservation, enhancement, or restoration of movement and physical function impaired or threatened by disease, injury, or disability
- General medicine** (This option is highlighted with a red box)
- General Medicine

7. Scroll down and click **Next**



The screenshot shows the same Contoso Healthcare interface. The "Reason" button is now blue, indicating it has been selected. At the bottom of the page, there are two buttons: "Previous" and "Next". The "Next" button is highlighted with a red box.

8. Click + Add Insurance



The screenshot shows the Contoso Healthcare interface again. The "Reason" button is blue. In the sidebar, under "Personal information", there is a red box around a button labeled "+ Add Insurance". At the bottom, there is a "Previous" button.

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

Contoso Healthcare Adam Atkins ▾

Home Find a doctor

Messages Appointments Medical records Personal information

Instant virtual appointment

Reason Personal Insurance Join

Subscriber / Policy Holder: Adam Atkins

Relationship to Patient:

Insurance *: Anything

Member ID *: 12345

Group ID *: 9876

By clicking the 'Next' button below, I verify that all information above is correct and up to date to my knowledge.

Previous Next

10. Click **Next**

Contoso Healthcare Adam Atkins ▾

Home Find a doctor

Messages Appointments Medical records Personal information

Instant virtual appointment

Reason Personal Insurance Join

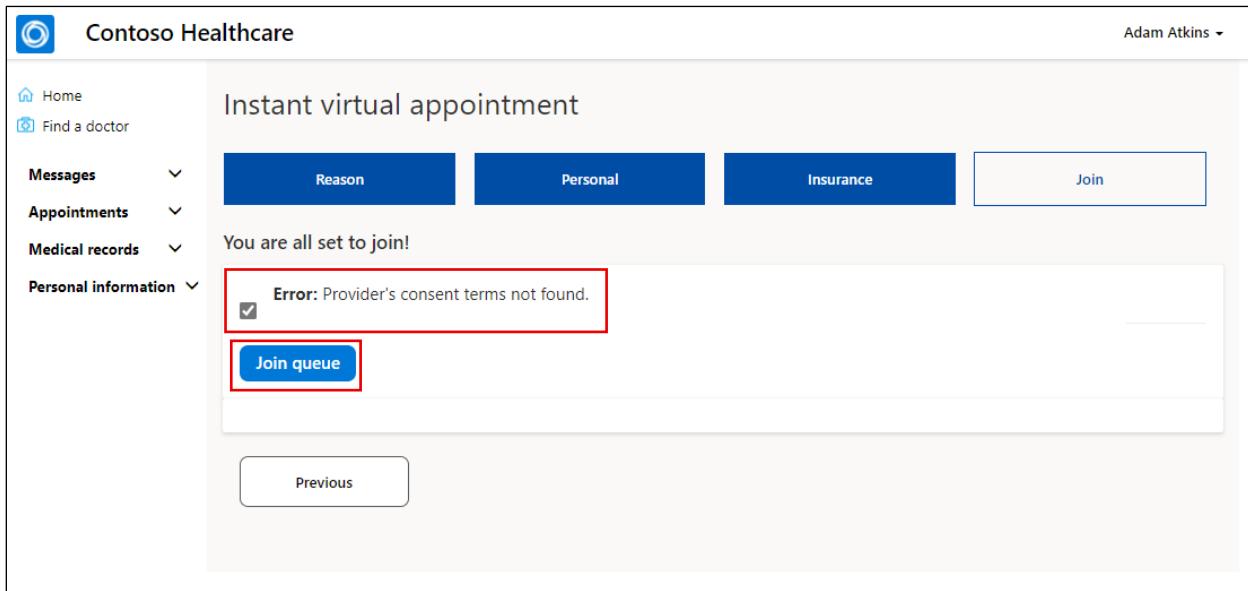
Verify Insurance

Upload a clear photo of the front of your insurance card.

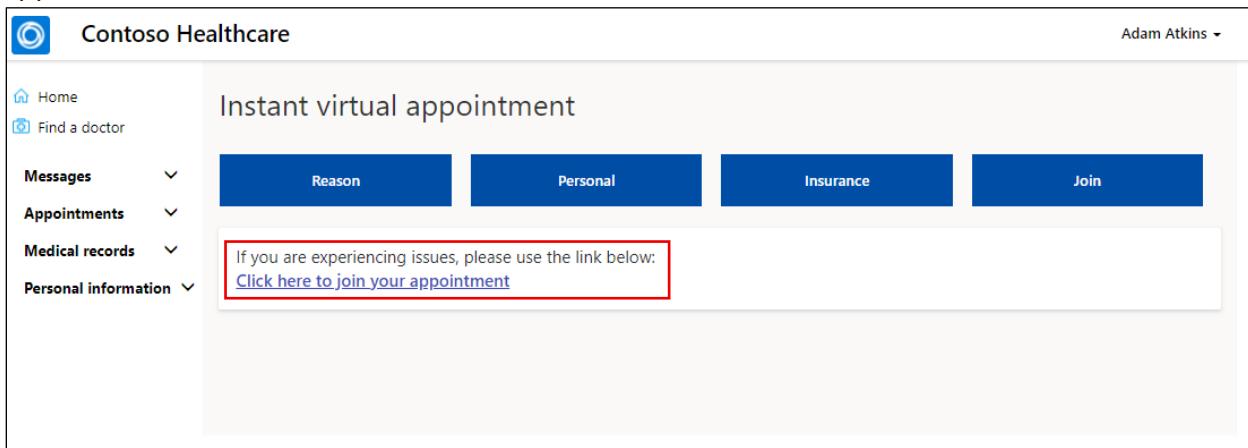
Front

Previous Next

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



12. A new internet browser tab will open and may be blank. **Click the link** provided to join the appointment.



13. Open a new tab in your browser and go to teams.microsoft.com. Navigate to the Virtual Clinic app that you embedded in the "Lamna Healthcare – Redmond" Teams channel. On the Instant Virtual Appointment Dashboard, you will see that Adam Atkins has arrived for a virtual appointment. **Double-click to open the record.**

The screenshot shows the Microsoft Teams interface with the 'General' tab selected. In the center, there's a card titled 'Instant Virtual Appointments Dashboard'. It displays a table with columns: Actor (Patient), Appointment Status, Virtual Appointment ..., and Subject. Under 'Actor (Patient)', it shows 'Adam Atkins' with a yellow button labeled 'Arrived'. To the right of this, there's a 'Join Meeting' button. The 'Virtual Appointment ...' column shows a small icon of a video camera.

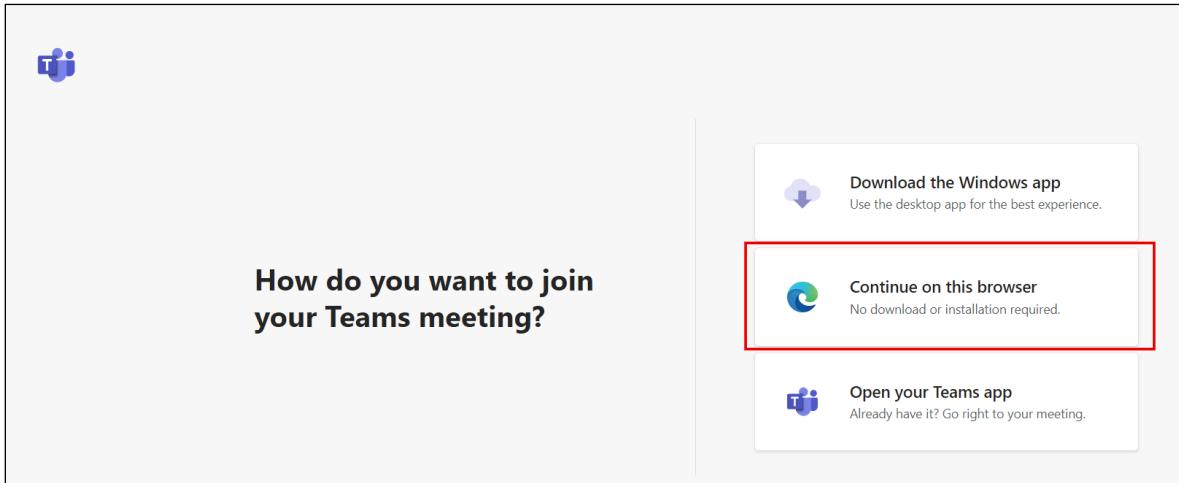
14. When Adam Atkins's patient record opens, click **Join Meeting**

The screenshot shows the Dynamics 365 interface for a patient record. The top navigation bar includes tabs for General, Posts, Files, Wiki, and Virtual Clinic. The 'Virtual Clinic' tab is active. Below the navigation, the main content area shows a patient record for 'Adam Atkins - General Medicine'. In the top right, there are buttons for Save, Mark Complete, Save & Close, Reschedule Appointment, Delete, and Join Meeting. The 'Join Meeting' button is highlighted with a red box. The record details include the subject (Adam Atkins - General Medicine), appointment type (Proposed), start time (9/15/2021 8:03 PM), end time (9/15/2021 8:03 PM), and a virtual appointment link.

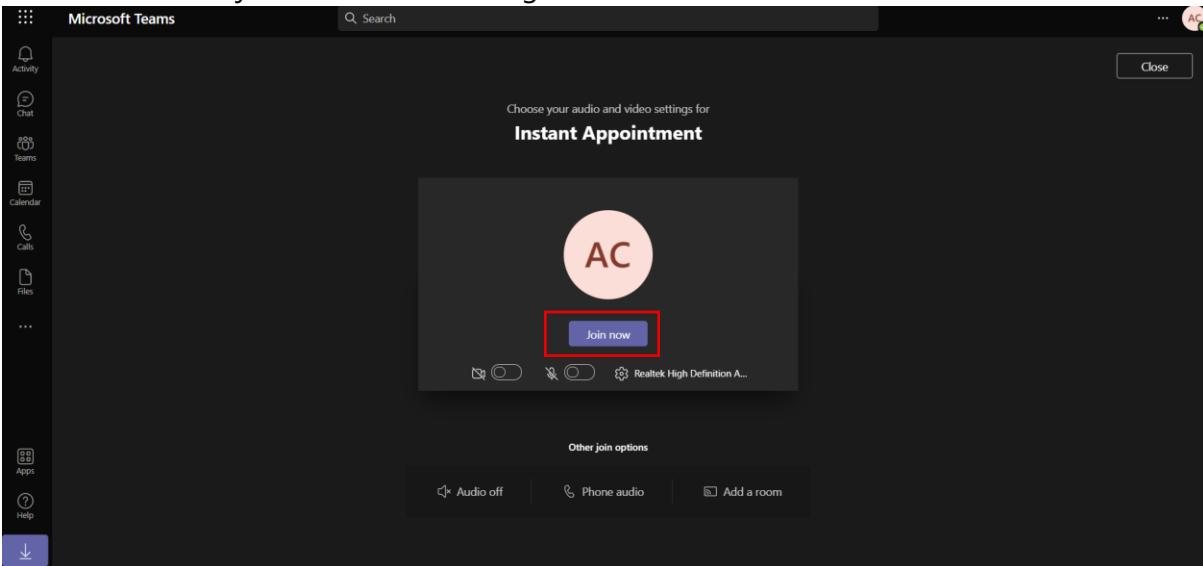
15. Click **Cancel** as we will not open the Microsoft Teams desktop app in this example.

A browser dialog box is shown, prompting the user about opening Microsoft Teams. It contains the message: 'This site is trying to open Microsoft Teams.' and 'https://teams.microsoft.com wants to open this application.' There is a checkbox labeled 'Always allow teams.microsoft.com to open links of this type in the associated app' with a checked status. At the bottom, there are two buttons: 'Open' and 'Cancel', with 'Cancel' being highlighted with a red box.

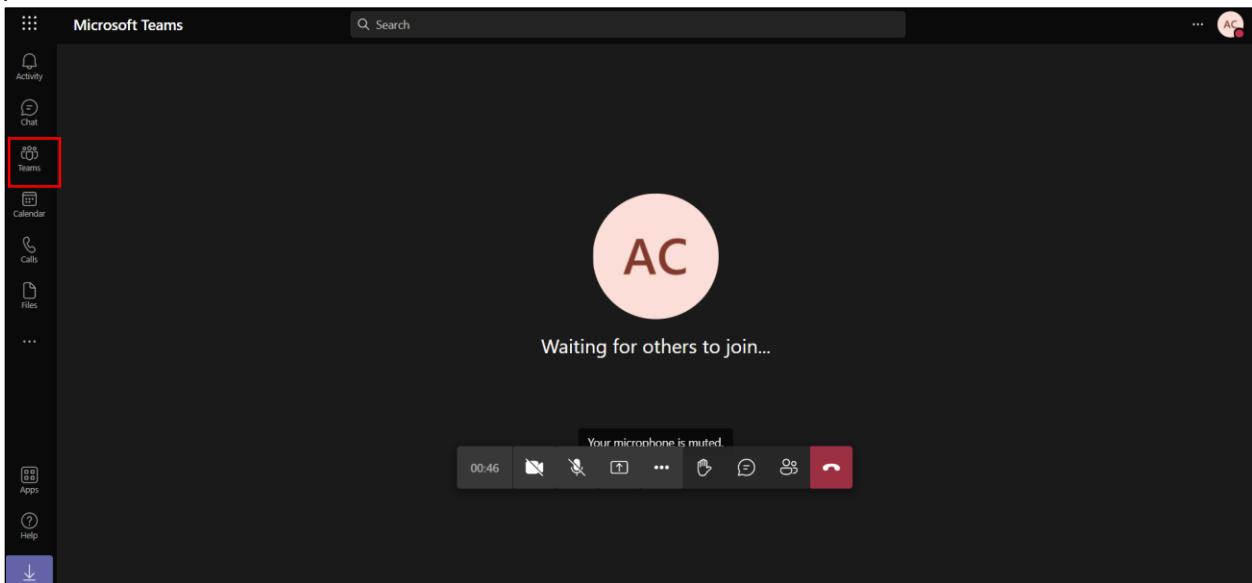
16. Click **Continue on this browser** to proceed with opening the virtual meeting.

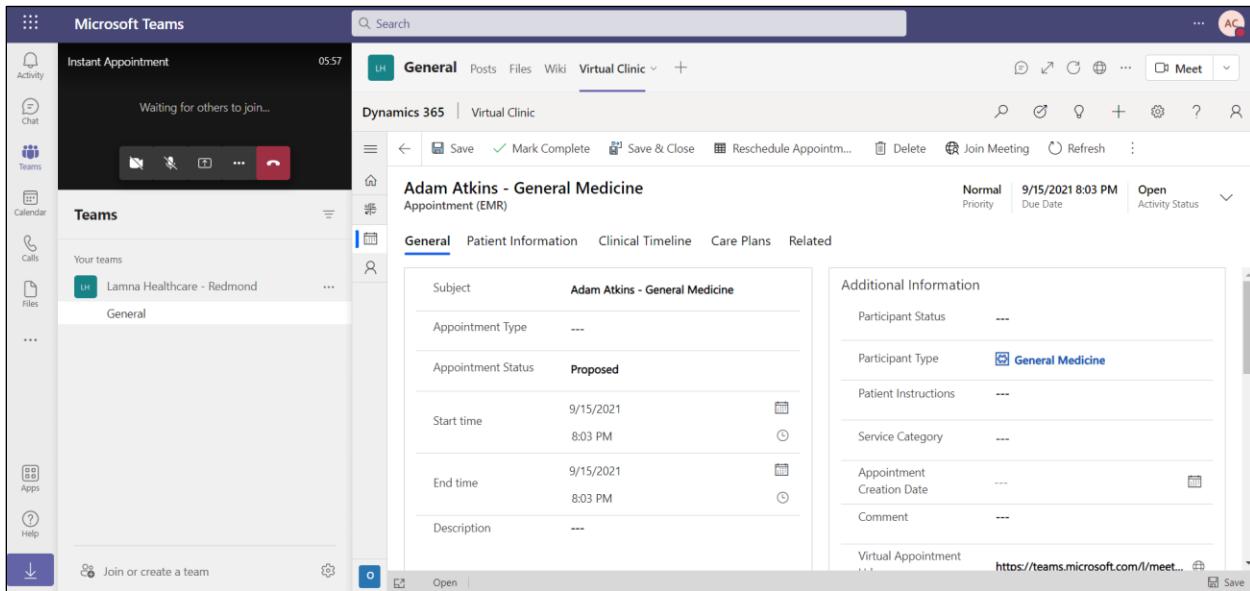


17. Click **Join now** to join the virtual meeting.



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





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

Summary

Nice work! You have completed **Lab 06 – Virtual Care**

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

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

Completing this lab concludes the Lamna Healthcare Company and Atkins family story as part of the Microsoft Cloud for Healthcare Industry Labs training.

