



Microsoft Cloud for Healthcare **in a Day**

Lab 03: Home Health

Step-by-Step Lab

30 minutes

January 2022

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Overview

Learning Objectives

In this module, you will do the following:

- Create a Bookable Resource
- Configure the Schedule Board
- Leverage Care Management Components with the Field Service Mobile App

Prerequisites

- None

Home Health Application

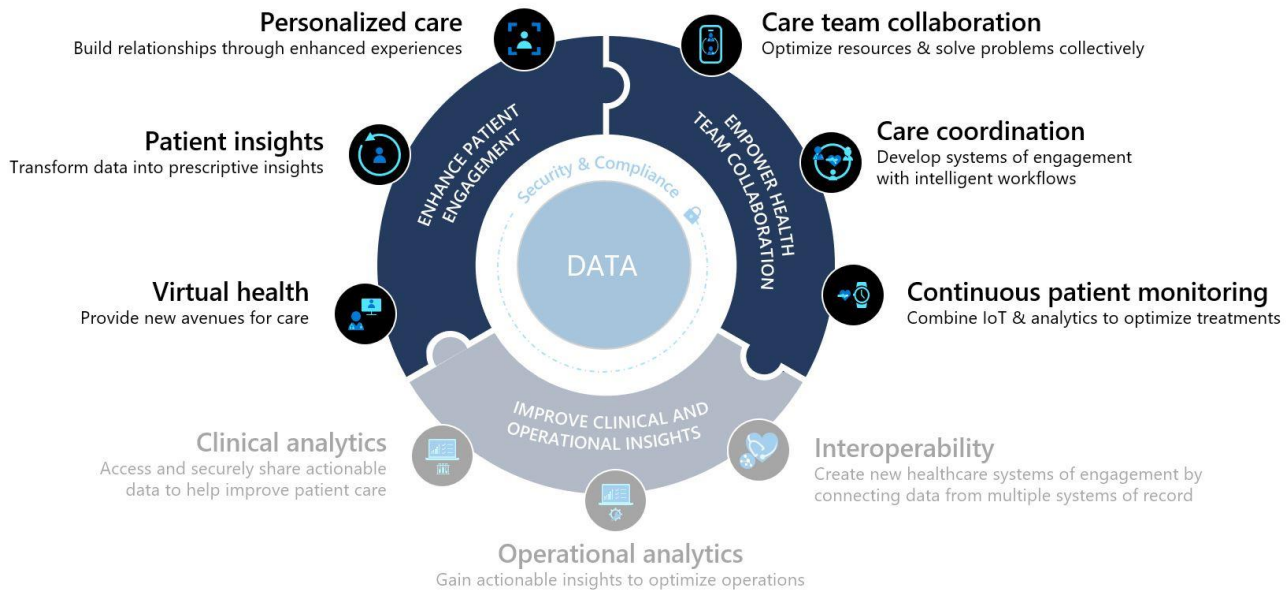
Microsoft Cloud for Healthcare's **Home Health** application allows provider personnel to schedule appointments for the patient based on a variety of factors. It allows for the communication of the right information, at the right time, to the right people, to provide safe and effective care to your patients. Manage home visit schedules, notify patients, and give access to medical information to the provider on the go.

Key capabilities of Home Health include:

- **Schedule home visit:** Enable care coordinators to schedule home visit appointments, while viewing patient information directly in context.
- **Provider scheduling:** View schedules of care team members and optimize visiting routes.
- **Patient engagement:** Notify patients about upcoming appointments, follow up with patients after a visit, and automatically check with patients between visits.
- **Home visit coordination:** Coordinate care and support distinct processes and tasks for the home visit.

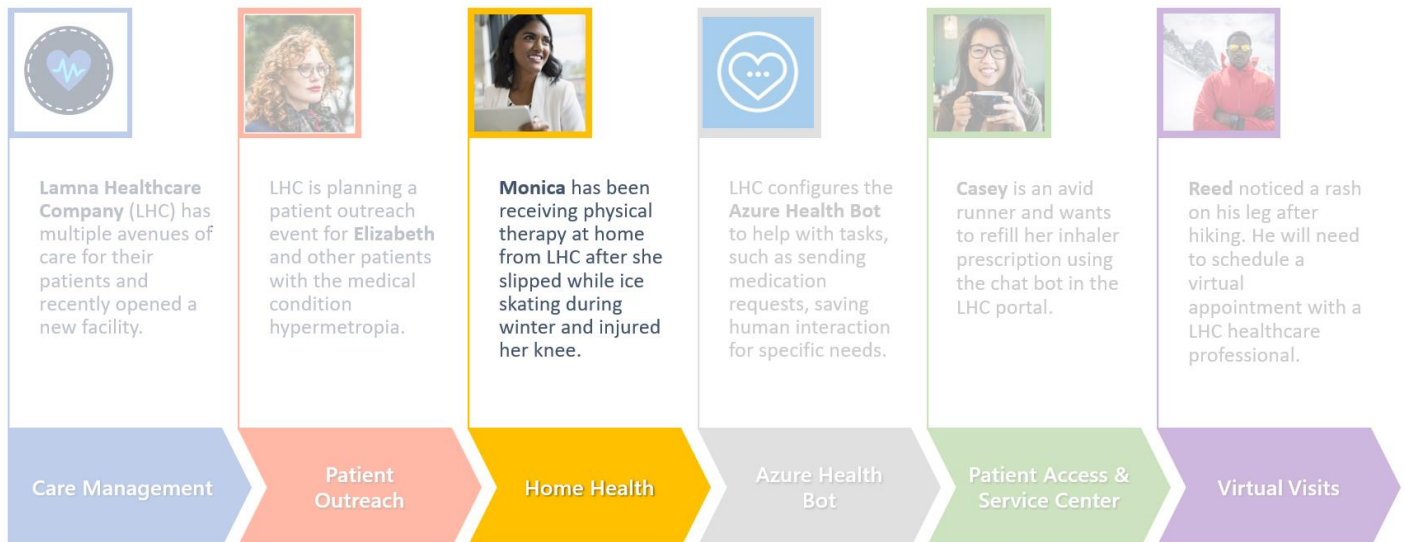
Industry Prioritized Scenarios

Home Health focuses on both the **Empower health team collaboration** and **Enhance patient engagement** priority scenarios by creating a system that allows for improved care team coordination with optimized resources and enhanced patient engagement with personalized experiences and home visits.



Healthcare Story

This lab will focus on the healthcare story of Monica Thomson.



Monica sprained her knee while ice skating last winter and was prescribed at-home physical therapy by her practitioner to rehabilitate the injury. To facilitate this home care scenario, Lamna Healthcare Company has deployed Microsoft Cloud for Healthcare's Home Health capabilities.

In this lab, you will play the role of a Lamna Healthcare Company Home Health dispatcher to configure the Home Health application.

Exercise 1: Create a Bookable Resource

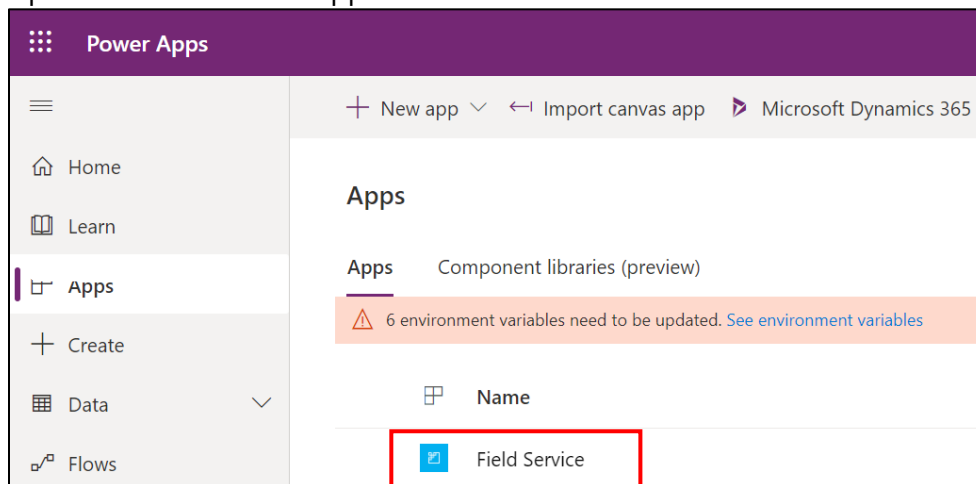
In this exercise, you will learn how to create a **Bookable Resource** to be used for scheduling a Home Health Work Order. A bookable resource in the Microsoft Cloud for Healthcare is anything that needs to be scheduled. This most commonly includes people, equipment, and physical spaces (facilities). Bookable Resources must be created before scheduling a Home Health Work Order.

Each resource can have different attributes that distinguish it from others, including but not limited to the following:

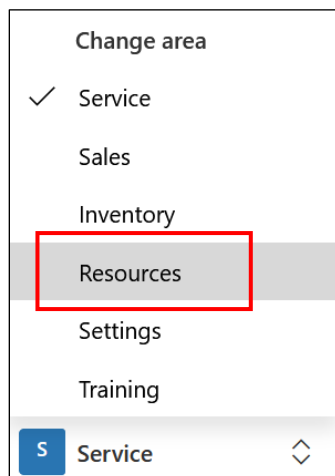
- Characteristics (for example: Accounting)
- Categories (for example: Manager)
- Territories (for example: Washington State)
- Organizational Unit (for example: Seattle Service Delivery)
- Location (for example: Location Agnostic)
- Resource Type (for example: User)

Now let's create a Bookable Resource in the Home Health application.

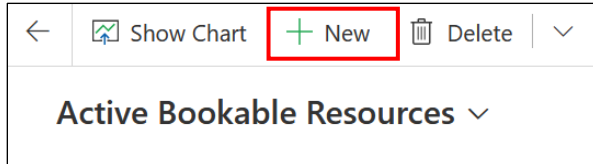
1. Navigate to <https://make.powerapps.com/>.
2. Open the **Field Service** app.



3. In the bottom left of the navigation pane, change the area from **Service** to **Resources**.

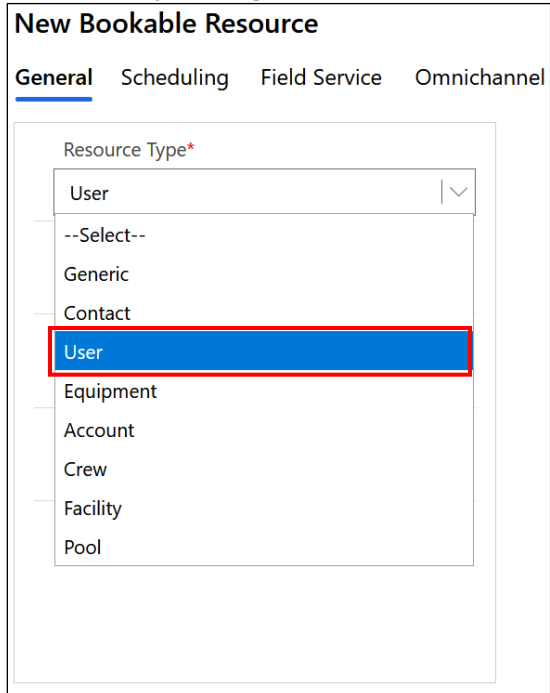


4. This will take you to the Bookable Resources entity. Click **New** on the command bar to create a new **Bookable Resource**.



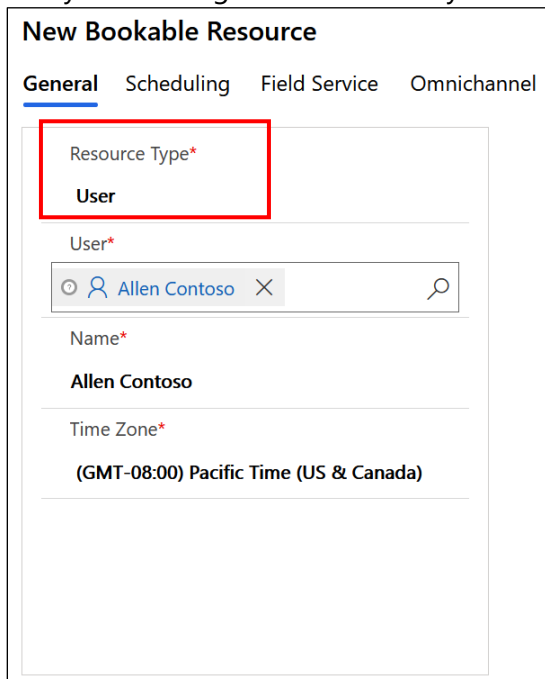
The screenshot shows the top of the Bookable Resources entity page. The command bar at the top contains a back arrow, a 'Show Chart' button with a bar chart icon, a '+ New' button (highlighted with a red box), a 'Delete' button with a trash icon, and a dropdown arrow. Below the command bar is a header section with the text 'Active Bookable Resources' followed by a dropdown arrow.

5. Select **Resource Type**. A Resource type is a classification that describes who or what the resource is and how the resource relates to your organization. In this case, select **User**, who is a person and a member of your organization and needs access to the Field Service Mobile app.



The screenshot shows the 'New Bookable Resource' form. The 'General' tab is selected. The 'Resource Type*' dropdown menu is open, showing a list of options: 'User', '--Select--', 'Generic', 'Contact', 'User' (highlighted with a blue bar and a red box), 'Equipment', 'Account', 'Crew', 'Facility', and 'Pool'. The 'User' option is the correct selection for a person.

6. Pick your training **User** and select your **Time Zone**.



The screenshot shows the 'New Bookable Resource' form with the 'User' resource type selected. The 'Resource Type*' dropdown is highlighted with a red box. Below it, the 'User*' field shows a search bar with 'Allen Contoso' selected. The 'Name*' field displays 'Allen Contoso'. The 'Time Zone*' field shows '(GMT-08:00) Pacific Time (US & Canada)'.

7. Click **Scheduling** to decide where the resource starts and ends his or her working day for scheduling and routing purposes. There are three options available when selecting the **Start/End location** for the Bookable Resource:

- **Location agnostic** - select this option if the location of this resource is not required for the business need and does not need to be considered during the scheduling process. Note that if the work location of a requirement is set to **on site**, location agnostic resources will not return in results.
- **Resource Address** - select this option if the resource starts and ends his or her day at a unique location. The exact location is derived from the latitude and longitude values on the related user, account, or contact records depending on the resource type.
- **Organizational Unit** - select this option if the resource starts and ends the day at an organizational unit, typically representing a company location.

In this case, choose **Location Agnostic**.

General	Scheduling	Field Service	Omnichannel	
Start Location	*	Location Agnostic	Generic Type (Deprecated)	---
End Location	*	Location Agnostic	Organizational Unit	---
Scheduling				
Display On Schedule Board	*	Yes	Enable for Availability Search	Yes

8. Click the **Field Service** tab to optionally configure any other aspects of the Bookable Resource.

New Bookable Resource - Unsaved			
General	Scheduling	Field Service	Omnichannel
Hourly Rate	---	Time Off Approval Required	No
Warehouse	---		
Enable Drip Scheduling	No	Enable for Field Service Mobile (legacy Xamarin app)	No
Bookings To Drip	---		

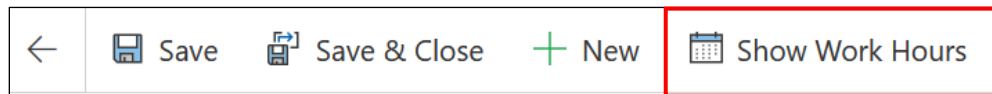
9. **Save** the record.

<	↺	Save	Save & Close	+ New	Flow	▼
New Bookable Resource - Unsaved						
General	Scheduling	Field Service	Omnichannel			

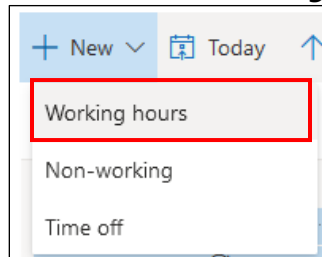
10. After **saving** the bookable resource, it's time to set the **working hours** of the resource. Working hours are considered by the following:

- The schedule board by displaying working and nonworking hours as different colors.
- The schedule assistant by only displaying resources that are working in the result.
- Resource Scheduling Optimization, which automatically books requirements to resources that are working.

Click **Show Work Hours** on the command bar:



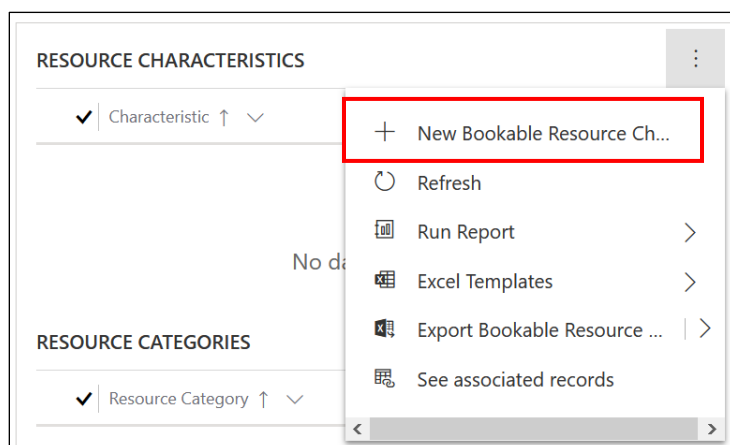
11. Click **+New** -> **Working hours**.



12. Choose **date** you want the working schedule to begin on, the beginning and end **time** of working hours (such as 8am to 5pm), along with a **repeat** option such as "every day" and then click off Sunday and Saturday. Click **Save**.

A screenshot of a 'Working hours' configuration dialog box. The dialog has a title bar with a close button. Inside, there are two toggle switches: 'All Day' (off) and 'Capacity' (off). Below these is a date picker showing '11/16/2020'. Underneath is a time range selector showing '08:00 AM' to '05:00 PM'. Below that is a 'Repeat' section with a circular arrow icon and the text 'Repeat: Every week'. At the bottom is a row of seven circular buttons representing the days of the week: 'Su', 'Mo', 'Tu', 'We', 'Th', 'Fr', and 'Sa'. The 'Su' and 'Sa' buttons are highlighted with red boxes. Below the day buttons, there is text indicating the schedule occurs every Monday through Friday. At the bottom of the dialog, there is a time zone dropdown set to '(GMT-08:00) Pacific Time (US & Canada)' and a toggle switch for 'Observe Business Closure' which is turned on.

13. Go back to the General tab. If the bookable resource has specific skills, you should add them now. To create a **Resource Characteristic**, go to the subgrid on the form and select **+New Bookable Resource Characteristic** from the command menu.



14. In the **Skill Name** field, click the magnifying glass and select **+New Characteristic**.

Quick Create: Bookable Resource Characteristic

Skill Name *

User (Agent) No records found. Create a new record.

Rating Value [+ New Characteristic](#) [Advanced lookup](#)

15. A quick create form for Characteristic will appear. We want to assign a characteristic to the bookable resource. In this case, the user can speak Spanish fluently. Therefore, type **"Spanish fluency"** for the characteristic **Name** and click **Save & Close**.

Quick Create: Characteristic

Name * Spanish fluency

Description ---

Characteristic Type * Skill

[Save and Close](#) [Cancel](#)

16. Back on the Bookable Resource Characteristic quick create form, the Skill Name should be populated with the new Spanish fluency characteristic. Click **Save & Close**.

Quick Create: Bookable Resource Characteristic

Skill Name * Spanish fluency

User (Agent) * Allen Contoso

Rating Value ---

[Save and Close](#) [Cancel](#)

Note: Characteristics represent a resource's skills and certifications. This could be concrete, like a CPR certification; more general, like accounting or web development experience; or as simple as security clearance for a specific building or fluency in the Spanish language.

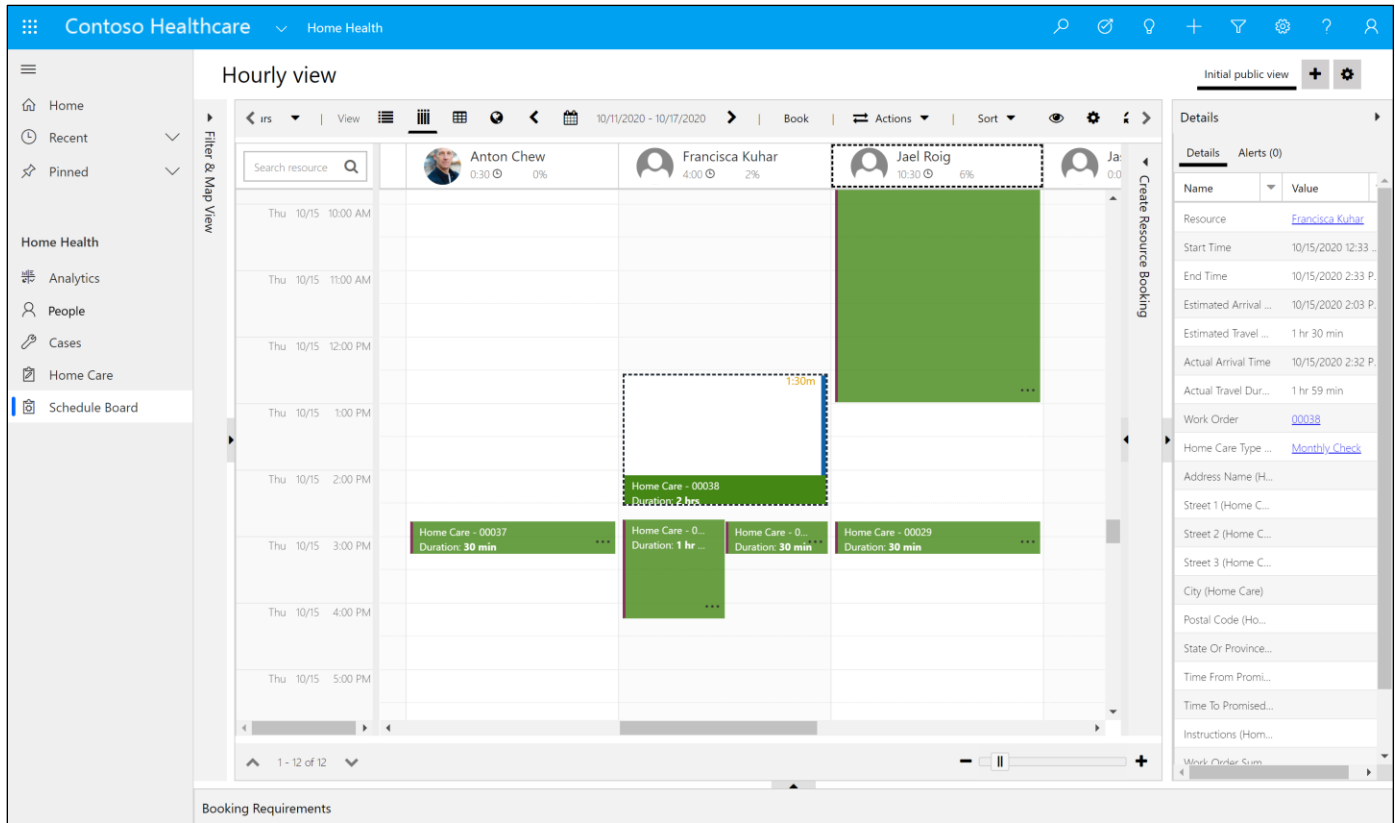
17. If you'd like more data in the system, you may create **two** more **Bookable Resources** following the same process. For each of them, select **Contact** as the **Resource Type** and choose any Contact in the system. Choose **Location Agnostic** just as before and click **Save**. Configure the **Work Hours** the same as the previous Bookable Resource and click **Save & Close**.

Congratulations! You have created a Bookable Resource. In the next task, we will use this bookable resource to help configure the Schedule Board. For more information on bookable resources, see [Set up bookable resources \(Dynamics 365 Field Service\) | Microsoft Docs](#).

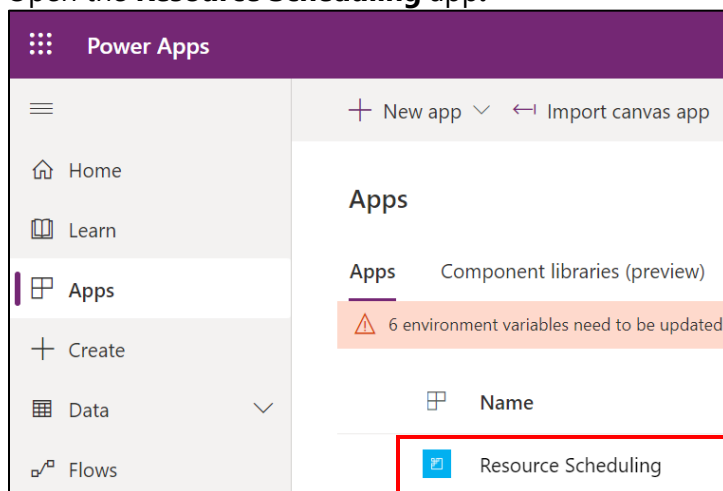
Exercise 2: Configure the Schedule Board

In this exercise, you will configure the schedule board for the **Bookable Resource** created in the previous task. The schedule board provides an overview of resource availability and bookings you can make. Before you use the schedule board, it is important to set up the views and filters to your preference. To use the schedule board booking functionality, geocoding, and location services, you need to turn on maps.

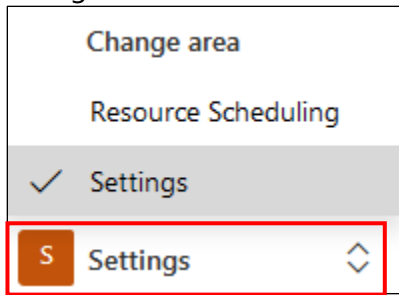
Here is an example of a configured **Schedule Board**:



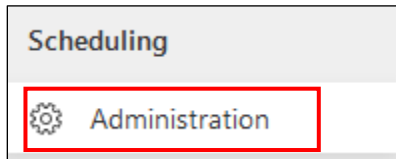
1. Navigate to <https://make.powerapps.com/>.
2. Open the **Resource Scheduling** app.



3. Change the area in the bottom left navigation drop down from Resource Scheduling to **Settings**.



4. Click **Administration** on the site map.



5. Select **Scheduling Parameters**.



6. Set "**Connect to Maps**" to **Yes**. Then click **OK** to accept the terms. If it is already set to yes, you can skip this step.

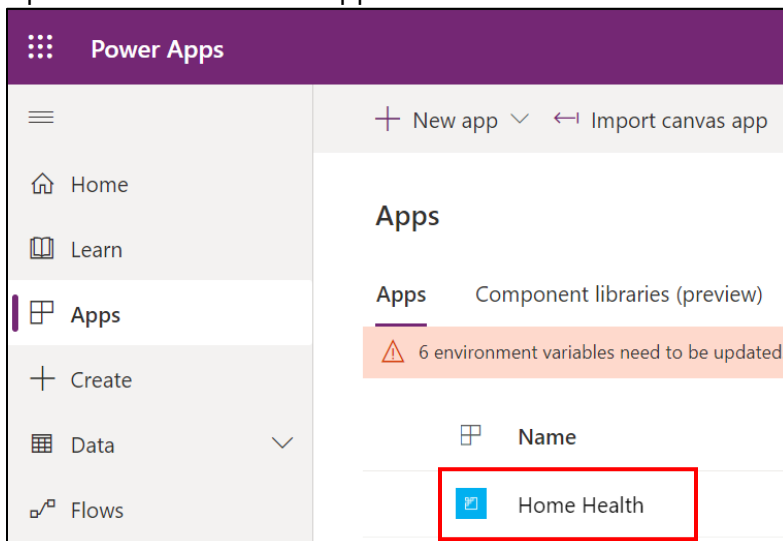


Disclosure: Enabling this field will allow the system to send addresses and coordinates to an external mapping provider (Bing by default) to represent locations on a map and to calculate distances and travel times. Turning off this feature will disable mapping and distance calculation for resource scheduling purposes.

OK

7. Click **Save & Close**.

8. Open the **Home Health** app.



9. Now we will associate the Thomson Household home care work order with the Spanish fluency characteristic, so they match Monica with someone who is fluent in Spanish. We have already applied this characteristic to her practitioner. We also want to set the estimated duration for the home visit.

Click **Home Care** on the left sitemap and open the Home Care Work Order record number **00034** associated with the **Thomson Household**.

Home

Recent

Pinned

Home Health

People

Cases

Home Care

Schedule Board

Active Home Cares

✓	Work Order Number	Household	Substatus	System Status
	00006	Contoso, Ltd.	---	Posted
	00028	Butler Household	---	Unscheduled
	00034	Thomson Household	---	Unscheduled
	00020	Contoso, Ltd.	---	Unscheduled
	00031	Murphy Household	---	Unscheduled

10. On the Summary tab, scroll down to the Primary Incident section and set the **Primary Incident Estimated Duration** to 1 hour (this will ensure that the work order takes up time on the Resource's calendar).

PRIMARY INCIDENT

Primary Incident Type *

Defective Monitoring Hardware

Primary Incident Description

Defects covered in patient vitals monitoring hardware

Primary Incident Estimated Duration

1 hour

Primary Incident Customer Asset

IoT Alert

11. Click **Related** and then click **Characteristics**.

00034 - Saved

Home Care

Summary Patient Information Settings Service Tasks Address Products Timeline Care Plan Related

GENERAL

Time Window Start

11/18/2020

3:30 PM

Time Window End

11/18/2020

5:00 PM

Patient

Monica Thomson

Household

Thomson Household

Physician

Home Visit Number *

00034

System Status *

Unscheduled

Substatus *

Home Visit Type *

Home Visit

Home Visit Summary

Replace Armbrace that is not staying connected

Price List *

Home Visit Price List

Timeline

Search time

Enter a no

Related - Details

Resource Bookings

Incidents

Products

Services

Service Tasks

Related - Common

Activities

Connections

Audit History

Actuals

Characteristics

Resource Preferences

Requirements

Work Order Resolutions

Time Entries

IoT Alerts

12. Click **+ New Requirement Characteristic**.

00034 - Saved
Home Care

Summary Patient Information Settings Service Tasks Address Products Timeline

Show Chart **+ New Requirement Cha...** Refresh Flow Run Report

Requirement Characteristic Associated View

13. Choose **"Spanish fluency"** for the **Characteristic** and Work Order **00034** as the **Resource Requirement**.

New Requirement Characteristic - Unsaved

General Field Service

Owner *

Characteristic * Spanish fluency

Rating Value ---

Resource Requirement * 00034

Important: Make sure the **Work Order** number populated in the **Resource Requirement** field on the general tab matches the Work Order number on the **Field Service** tab on the Resource Requirement record.

00034 - Saved
Resource Requirement

General Scheduling **Field Service** Related

Work Order 00034

14. Click **Save & Close**. You will now see the new characteristic requirement in the subgrid.

00034 - Saved
Home Care

Summary Patient Information Settings Service Tasks Address Products Timeline Care Plan **Characteristics** Related

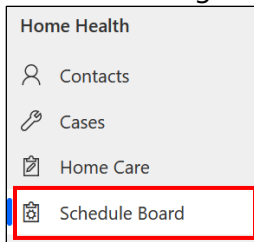
Show Chart + New Requirement Cha... Refresh Flow Run Report Excel Templates Export Requirement C...

Requirement Characteristic Associated View

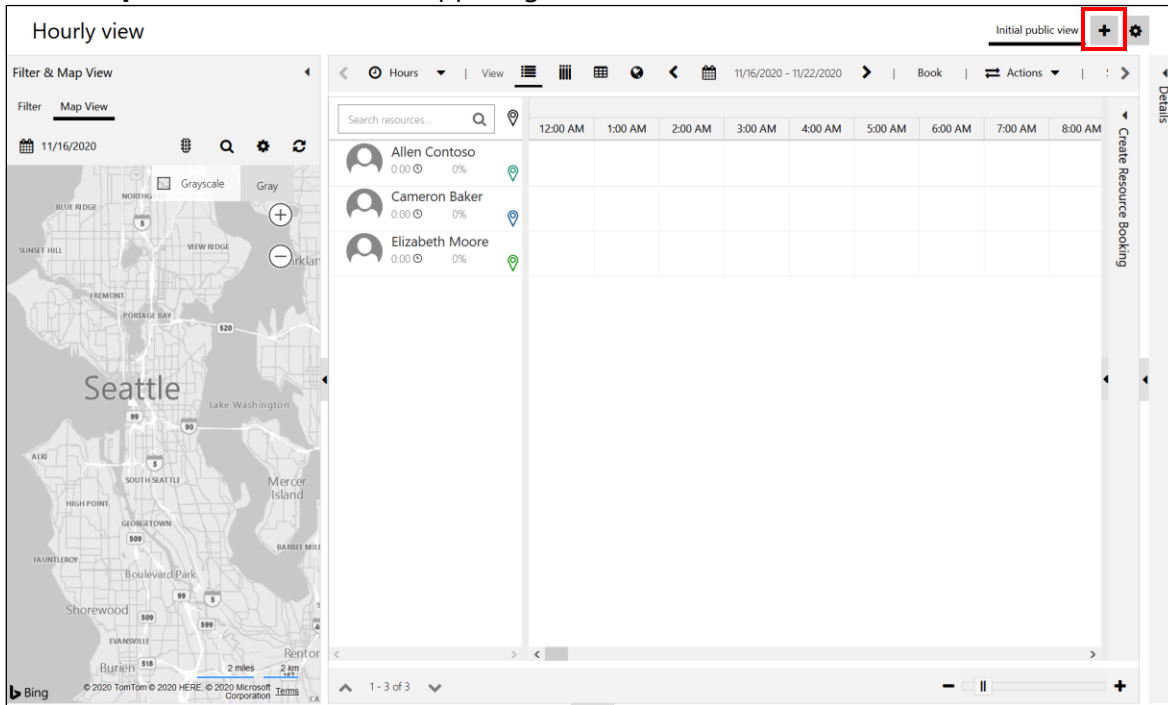
Search this view

Resource Requirement	Characteristic	Rating Value	Created On
00034	Spanish fluency	---	1/10/2022 11:53 AM

15. Now let's configure the schedule board. Select **Schedule Board** on the left site map.



16. Click the **plus button (+)** in the upper right corner to create a new **Schedule Board tab**.

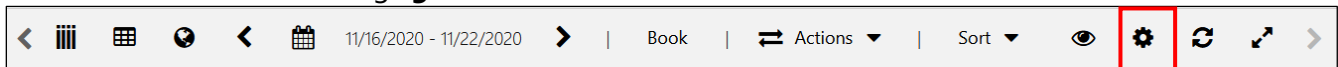


17. Name the new Schedule Board tab "**My Schedule Board Tab**". Leave all defaults and click **Add**.

A screenshot of the 'Add Tab' dialog box. It contains the following fields and sections:

- Name ***: A text input field containing 'My Schedule Board Tab'.
- Shared With ***: A dropdown menu set to 'Just Me'.
- Default** section: Contains 'Open Default Settings' and 'Reset to Default' buttons.
- General Settings** section: Contains a 'Map Settings' subsection with several dropdown menus for 'Map View Tab Placement', 'Requirement Map Filter View', 'Resource Tooltips View', 'Resource Details View', 'Organizational Unit Tooltips View', and 'Organizational Unit Details View', all set to '<Default View>'.
- Custom Web Resource** section: Contains 'Tab Name' and 'Web Resource' input fields.
- Schedule Board Colors** section: Contains color pickers for 'Fully Booked' (0D62AA), 'Partially Booked' (DEEBF7), 'Overbooked' (EA0000), and 'Not Booked' (FFFFFF).
- At the bottom are 'Add' and 'Cancel' buttons.

18. Click on the Scheduler Settings **gear icon**.




19. Change the Hours view to be closer to typical working hours, such as 6am to 6pm.

A screenshot of the 'Working Time' settings panel. It shows a 'Time Zone' dropdown set to '(GMT-08:00) Pacific Time (US & Canada)'. Below, there are two sliders for 'Start Time' and 'End Time', both currently set to 12 AM.

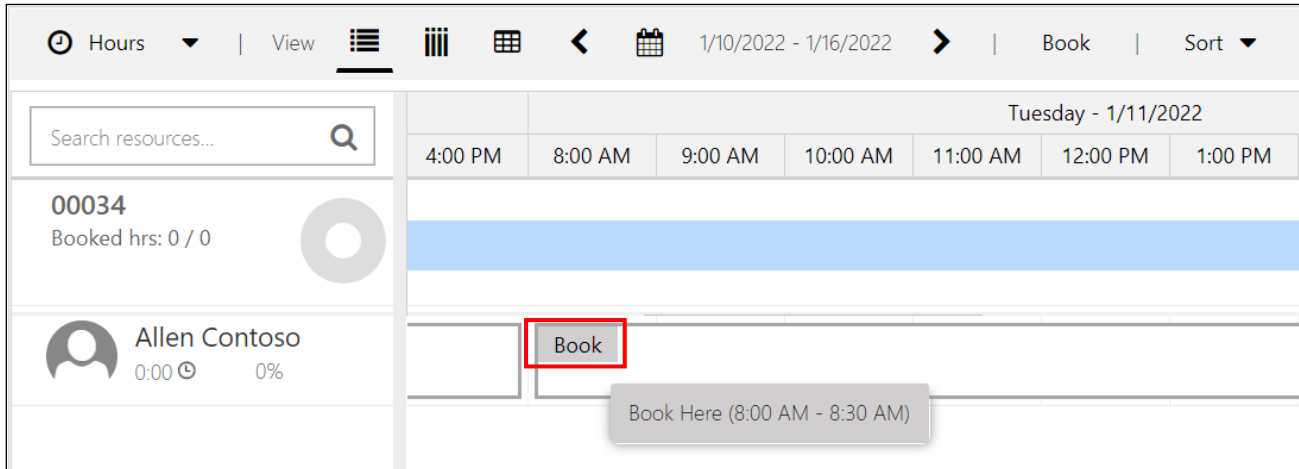
20. Open the **Unscheduled Work Orders** by selecting the small arrow at the bottom of the screen.

A screenshot of the 'Hourly view' interface. The main area shows a calendar grid for Wednesday, 1/12/2022, with a resource named 'Allen Contoso'. On the right, a settings panel is open, showing various configuration options like 'Time Zone', 'Working Time', 'Time Resolution', 'Resources Per Page', 'Number of days per page', 'Sizes', 'Travel Duration Settings', and 'View Settings'. At the bottom of the main interface, a small arrow icon is highlighted with a red box.

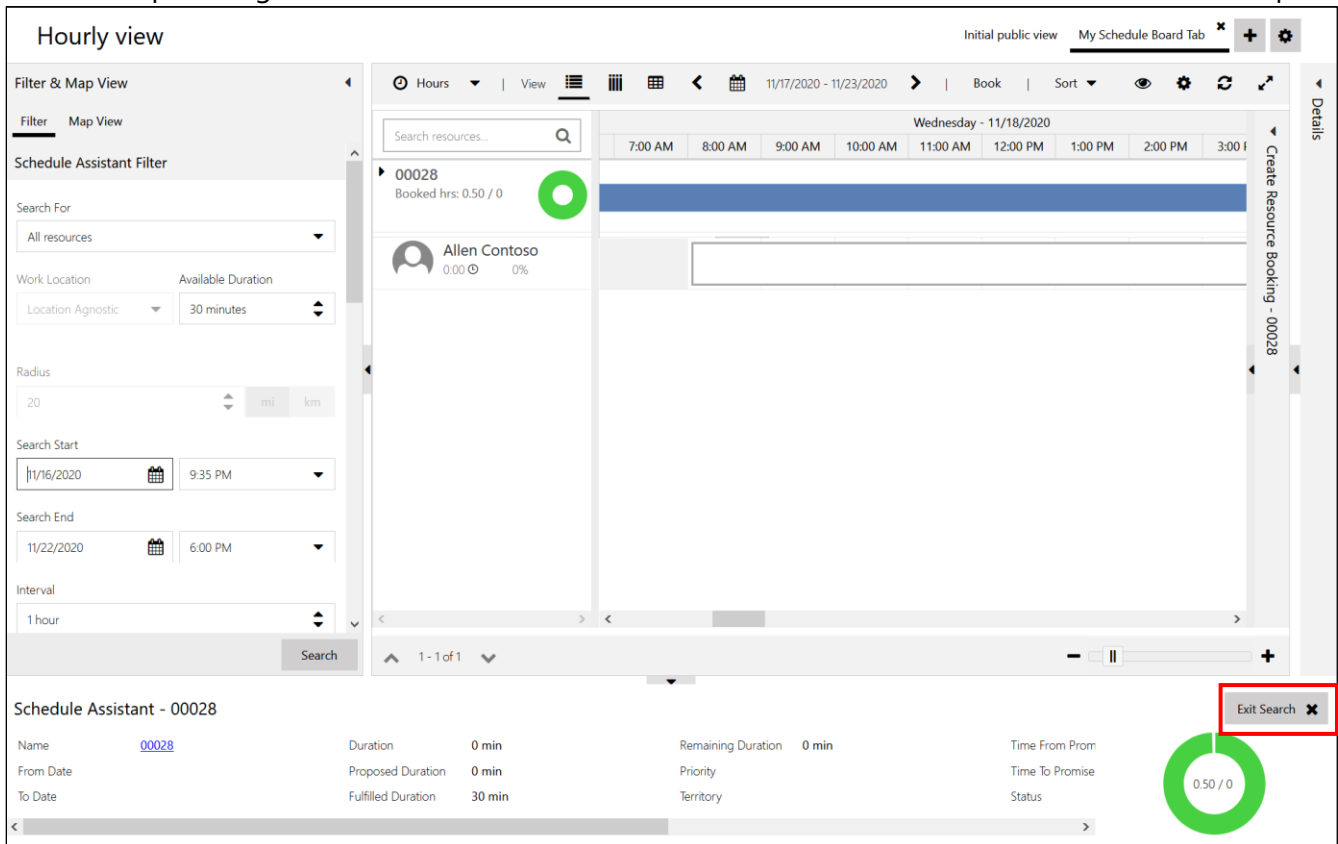
21. Select the **Unscheduled Work Orders** tab. Find work order **00034** where you added the **Spanish fluency** characteristic and click the grid to highlight it. Select **Find Availability** to open the Schedule Assistant filter.

Unscheduled Service Activities Open Requirements <u>Unscheduled Work Orders</u>															
Work C	Household (Home C	Is Prim	From C	To Date	Durati	Owner	Status	Priority	Time From	Time T	Fulfillm	Time Window	Time Winc	Work L	Created
00026	Irwin Household	Yes			0 min	Allen Co...	Active					11/05/2020 4:30...	11/05/2020 ...	Onsite	11/16/20...
00034	Thomson Household	Yes			0 min	Allen C...	Active					11/18/2020 7:30...	11/18/2020...	Onsite	11/16/2...
00031	Murphy Household	Yes			0 min	Allen Co...	<div>FIND AVAILABILITY</div>					11/19/2020 7:30...	11/19/2020 ...	Onsite	11/16/20...

22. Notice that any Bookable Resources which do not have the “Spanish fluency” characteristic are dropped from the search. Click the **Book** button on the Bookable Resource’s schedule to schedule the work order.



23. The work order is now scheduled and will no longer show in the Unscheduled Work Orders grid. The Resource Optimizing tool will schedule it for the next available time. Click **Exit Search** to close the pane.



Congratulations! You have configured a Schedule Board tab and scheduled a Home Health visit using the bookable resource you created in the previous task. For more information on schedule boards, see [Use and configure the schedule board \(Dynamics 365 Field Service\) | Microsoft Docs](#).

Exercise 3: [BONUS] Leverage Care Management Components with Field Service Mobile App

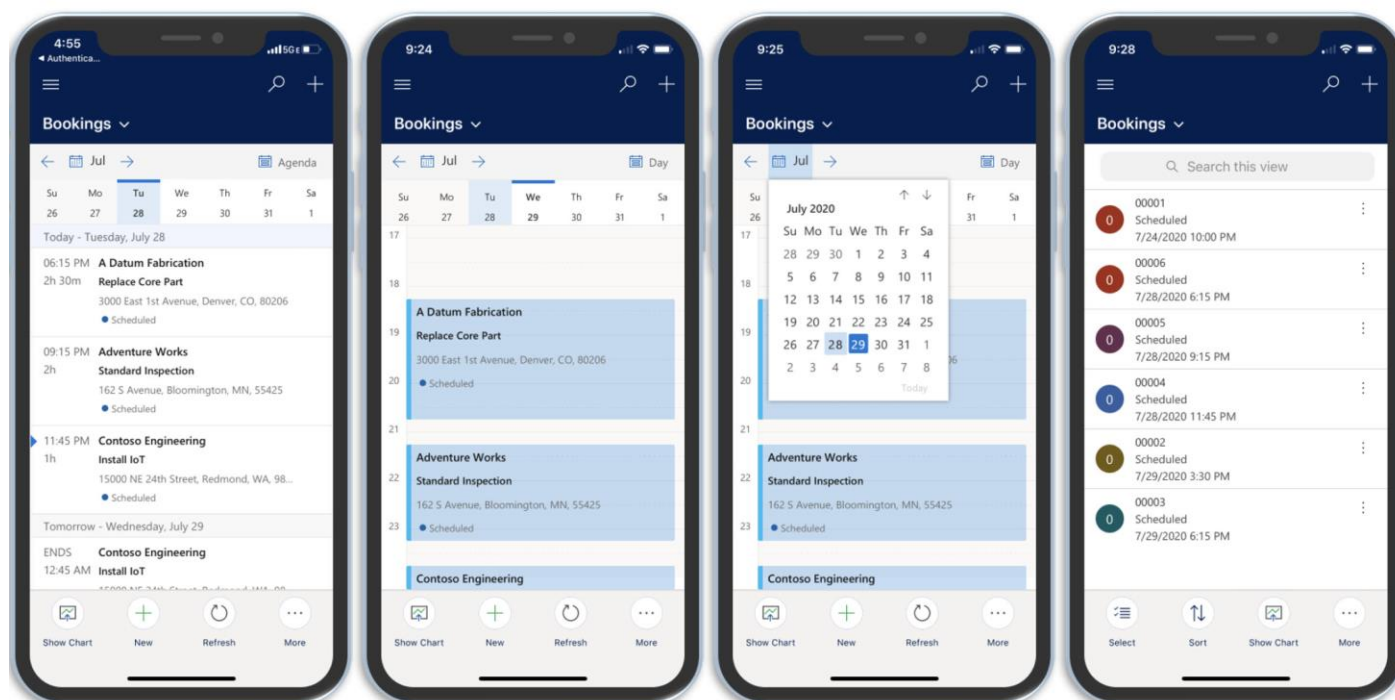
In this exercise, we will walk you through the **Field Service Mobile App** and demonstrate how to leverage **Care Management** components from the perspective of a Nurse or a Physical Therapist out in the field working with a patient. We will explain the installation process, how to set up **Home Health** users and security profiles, and how to use the mobile app to complete work orders.

[The Field Service \(Dynamics 365\) mobile app](#) is designed and optimized for mobile health workers to view Dynamics 365 Home Health work orders and patient information. This mobile app is **built on Microsoft Power Platform** and is customizable to your business needs with the same admin console as all Dynamics 365 business apps.

It is available natively for Apple iOS and Google Android phones and tablets, the Field Service (Dynamics 365) mobile app offers technicians many capabilities they need to perform onsite customer service, such as the following:

- A calendar view of assigned jobs
- Support for picture, video, and asset barcode scanning
- Customer signature capture
- Offline capabilities so mobile health workers can continue viewing and recording work in areas without internet

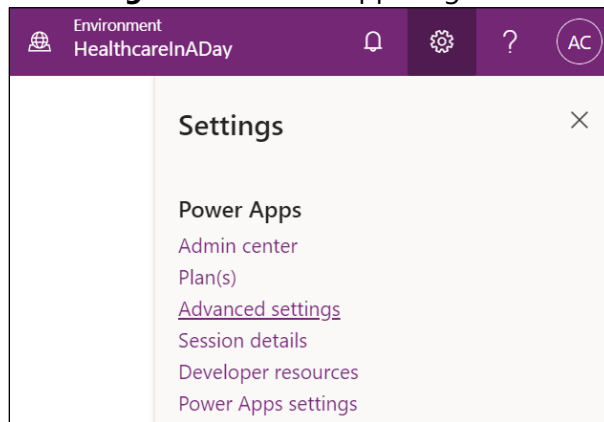
Here is a calendar view of scheduled work orders:



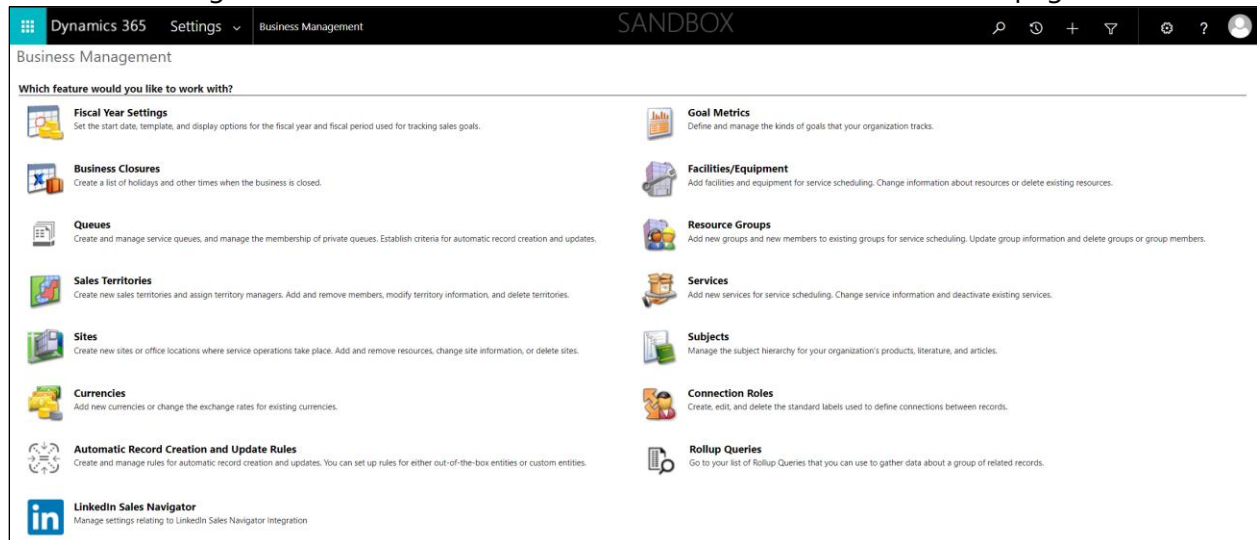
Task 1: Assign Security Roles to Field Service Mobile Users

In this task we will assign the Field Service – Resource role to Home Health workers.

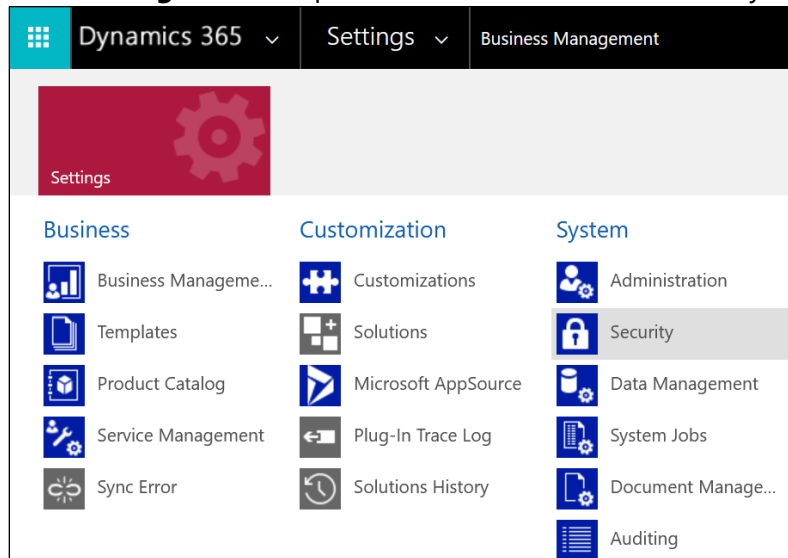
1. Navigate to <https://make.powerapps.com> in your incognito window.
2. Click the **gear icon** in the upper righthand corner and go to **Advanced Settings**.



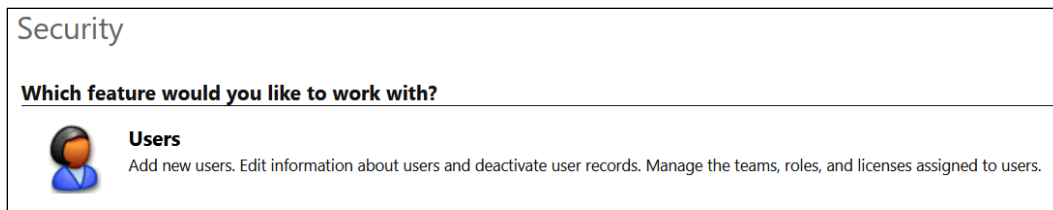
3. You will be navigated to the classic view. If it takes a while to load, refresh the page.



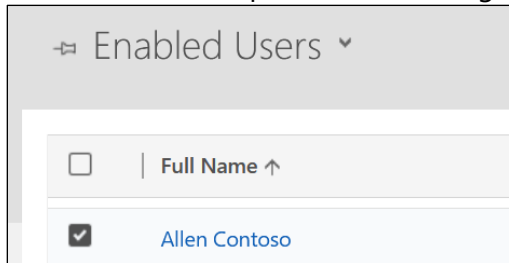
4. Click **Settings** on the top command bar and then in the flyout menu choose **Security**.



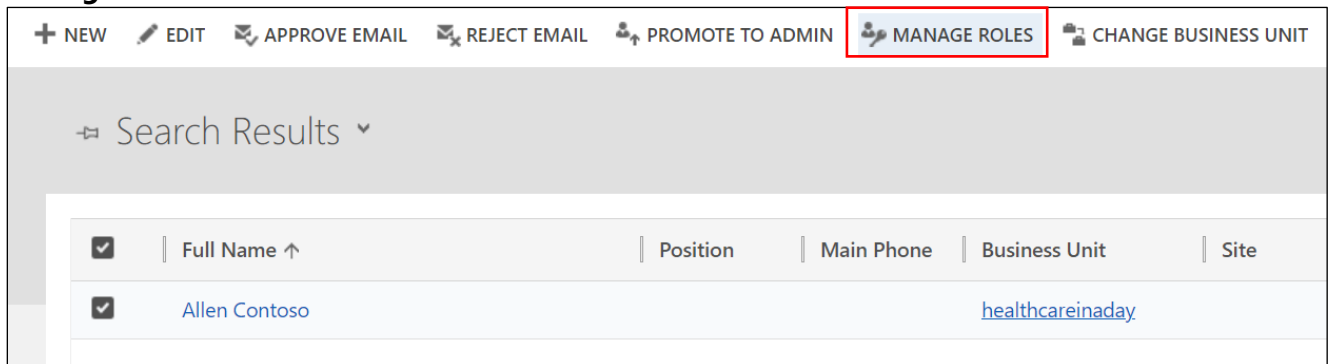
5. Click **Users**.



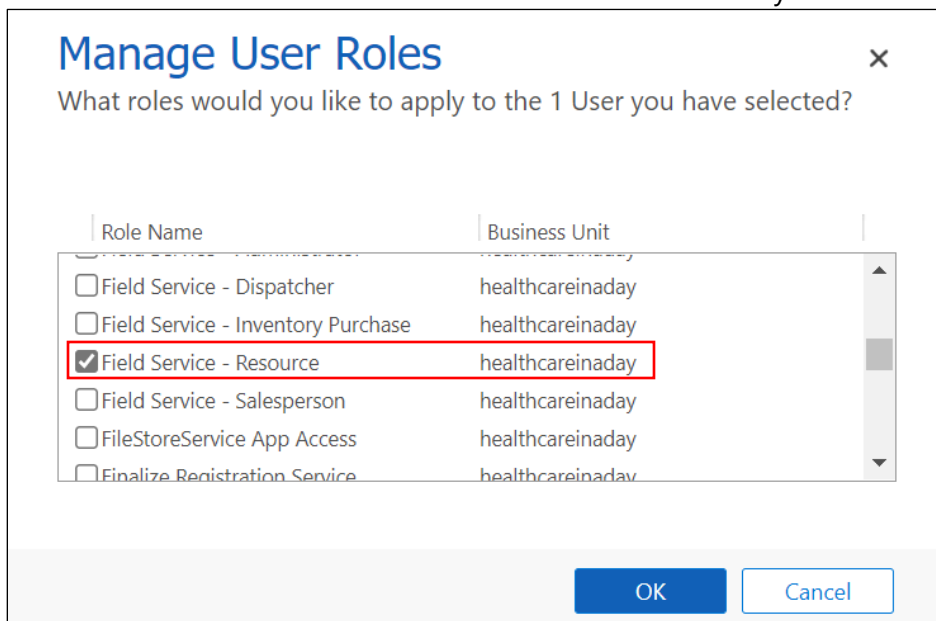
6. Select the view drop-down and change the view to show **"Enabled Users"**.



7. Find and select the user whom you would like to assign the "Field Service – Resource" role. Select **Manage Roles** on the command bar.



8. Scroll down to select the **"Field Service – Resource"** security role and click OK.

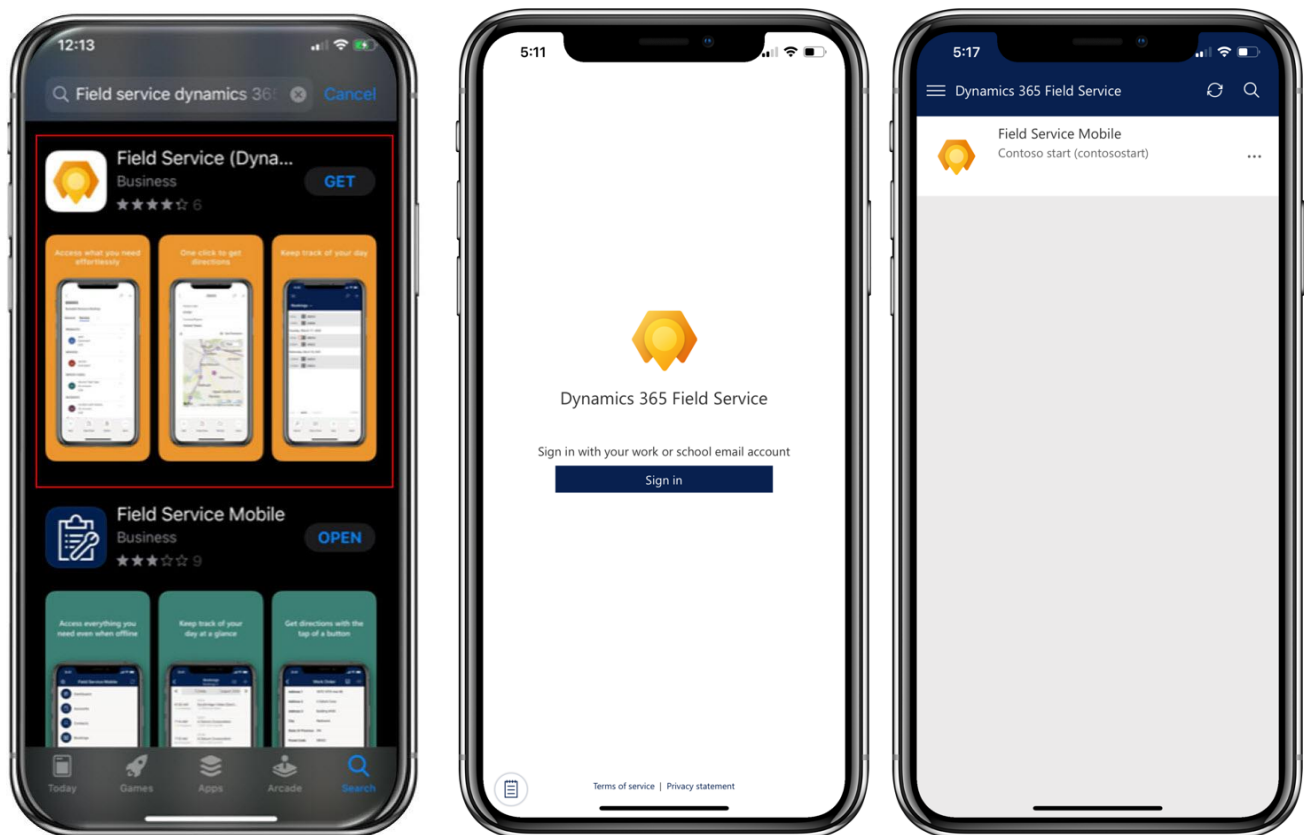


Congratulations! You have assigned the Field Service – Resource role to a Field Service Mobile Home Health user in the Microsoft Cloud for Healthcare.

Task 2: Download the Field Service Mobile app and sign in

In this task, we will walk through how to download the Field Service Mobile app to an iOS or Android device and sign in.

1. Go to the app store on your iOS or Android device and search for Dynamics 365 Field Service.
2. Download the app called **Field Service (Dynamics 365)**, as seen in the following screenshot. It is the mobile application built on the Power Platform.
3. Launch the app and sign in with the Microsoft Cloud for Healthcare username and password for the user that you assigned the "Field Service – Resource" security role to in the previous task.

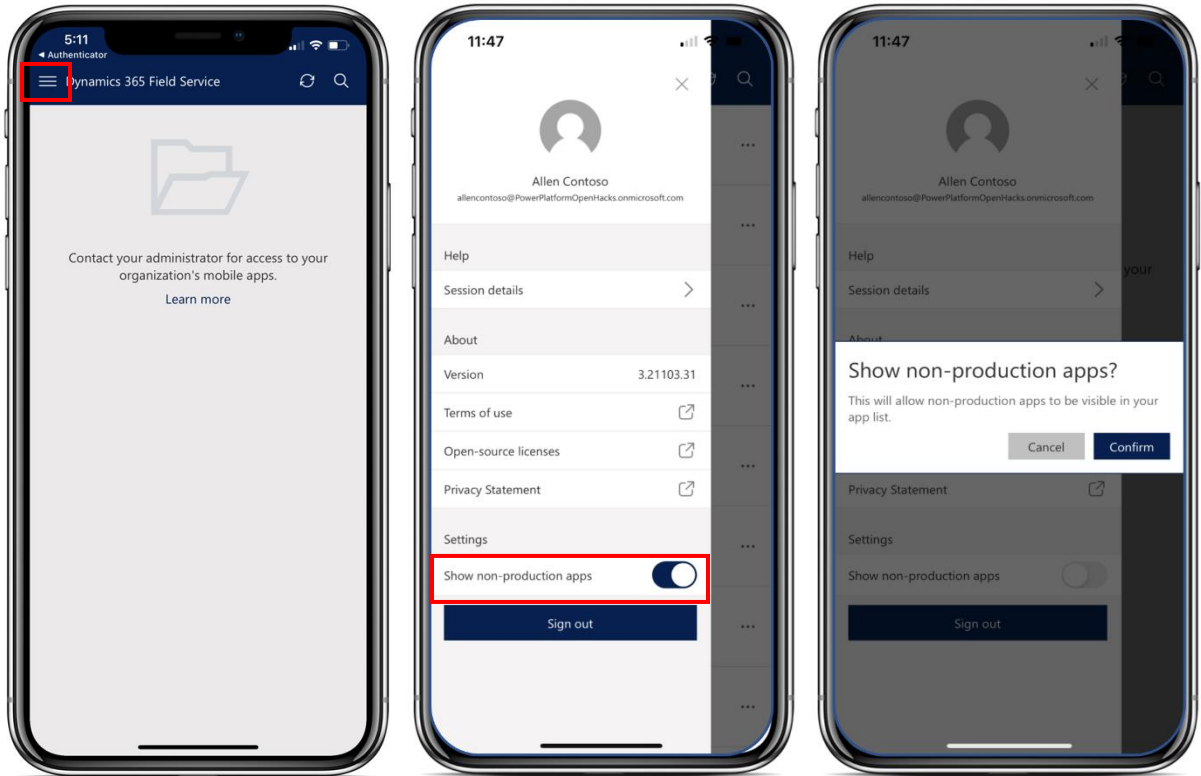


Congratulations! You have downloaded and signed into the Field Service Mobile as a Home Health user in the Microsoft Cloud for Healthcare

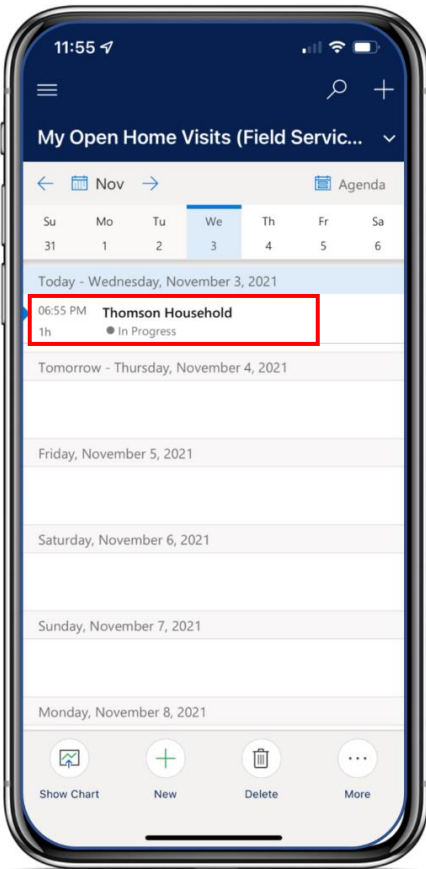
Task 3: Use the Field Service Mobile app to manage Home Health Work Orders

In the last exercise, we assigned **Home Health Work Order** 00034 to our Home Health Bookable Resource. We will now view and make updates to the work order in the Field Service mobile app, and then view those changes in the Microsoft Cloud for Healthcare Home Health app.

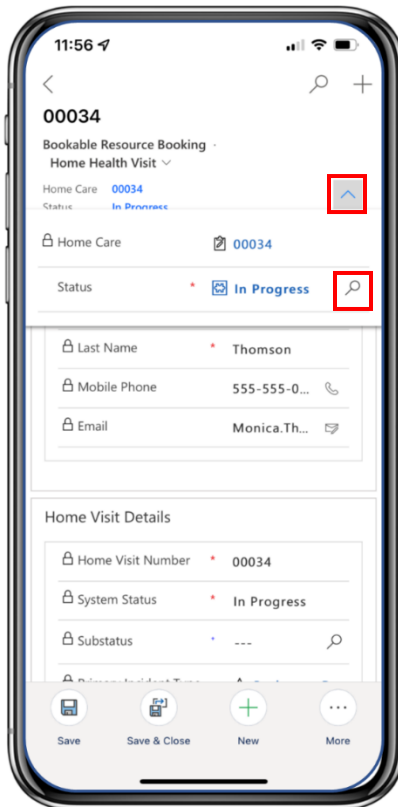
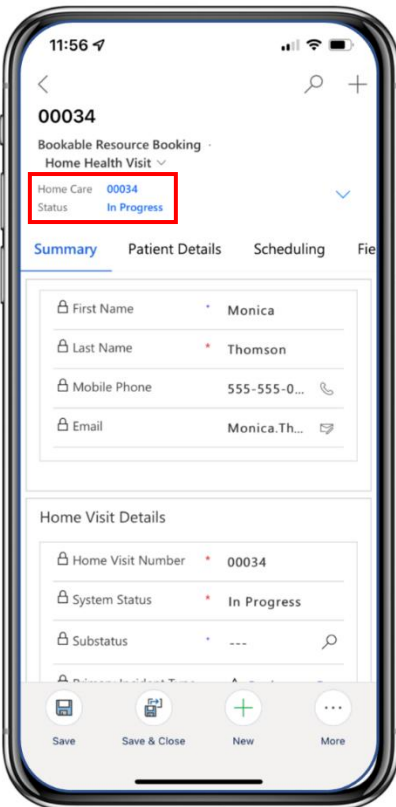
1. On your mobile device, log into the Field Service Mobile App as your Bookable Resource user. If you encounter a message that says "Contact your administrator for access to your organization's mobile apps", select the menu icon in the top left and **toggle Show non-production apps to Yes**.



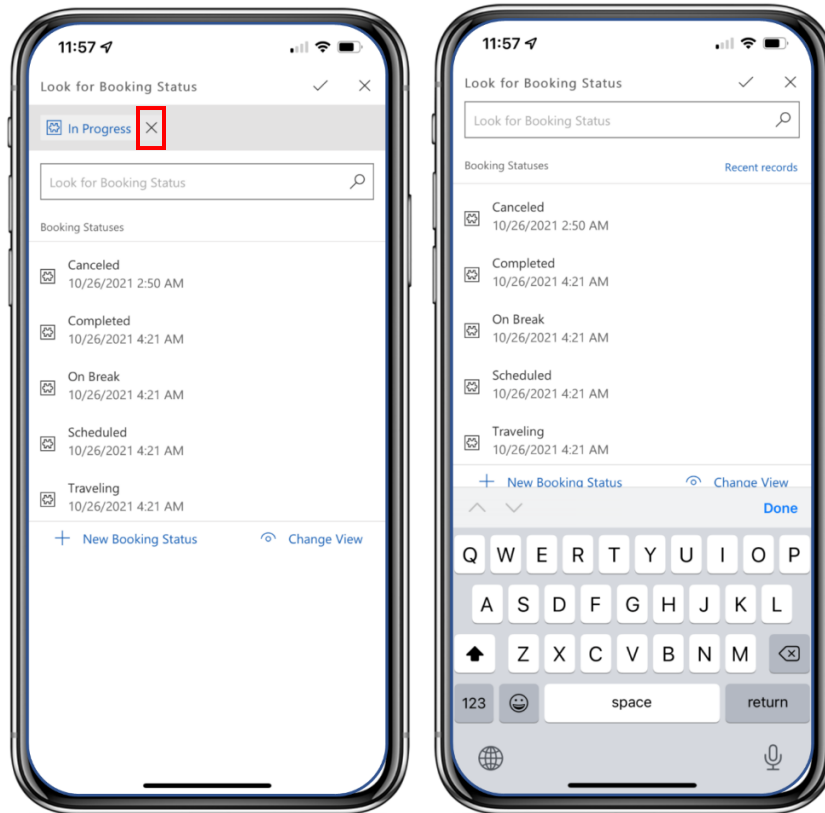
2. In the list of environments, **find the Microsoft Cloud for Healthcare environment** that you have been working in. You will find the Home Health Work Order in the calendar view in an **"In Progress"** state.



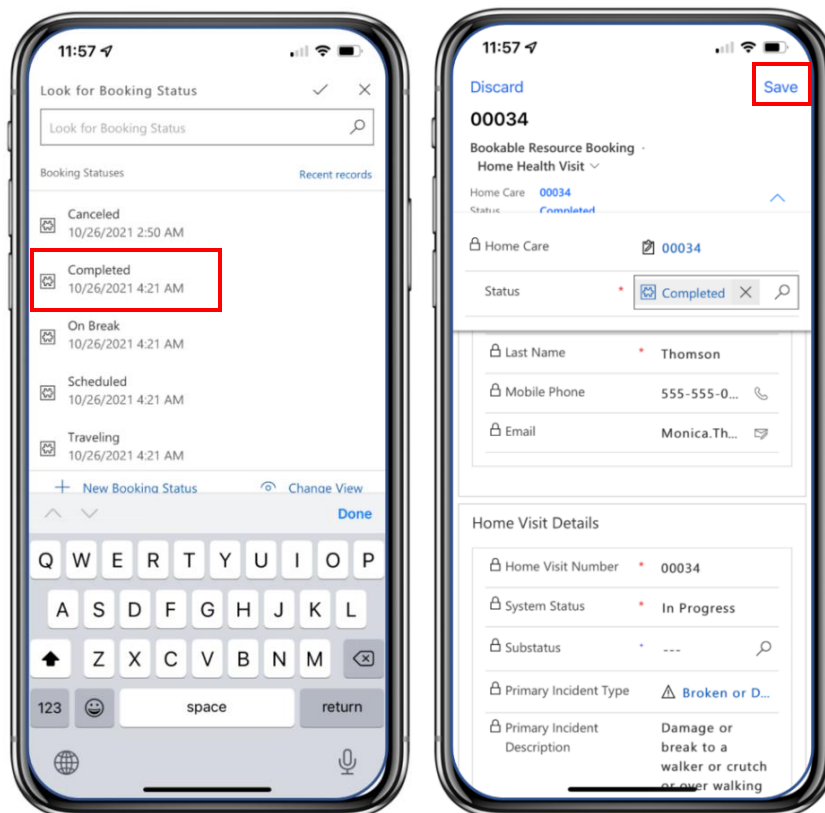
3. **Click to open** the Work Order. Notice the Booking Status says **In Progress**. Expand the status field using the blue arrow in the upper right. Click the **magnifying glass** next to the status field to modify the value.



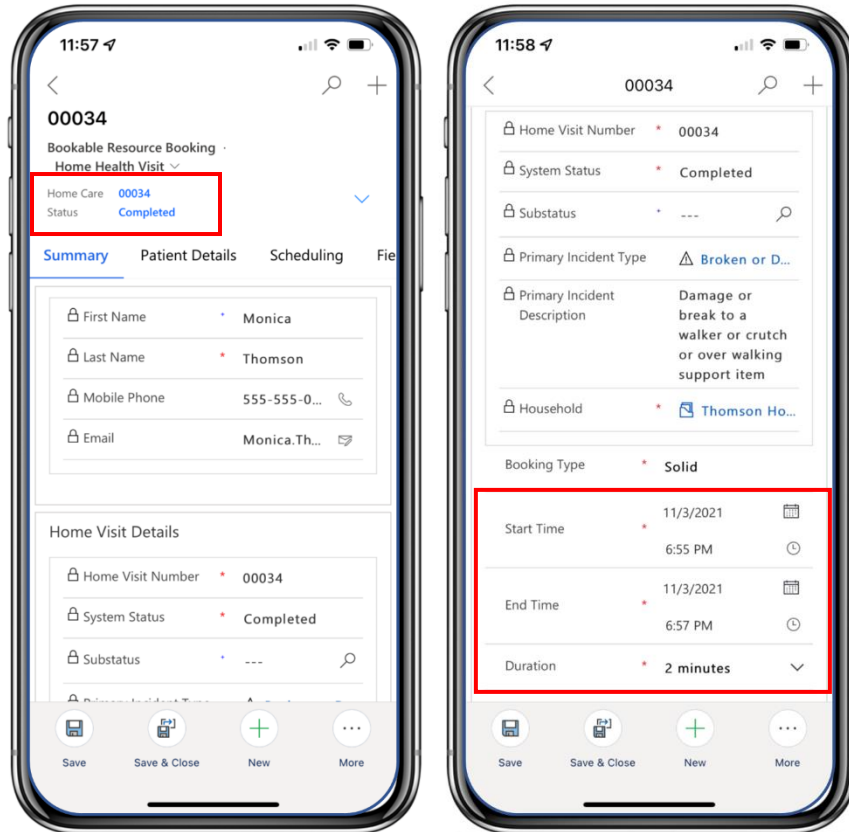
4. **Remove** In progress from the selected values by clicking the x next to it.



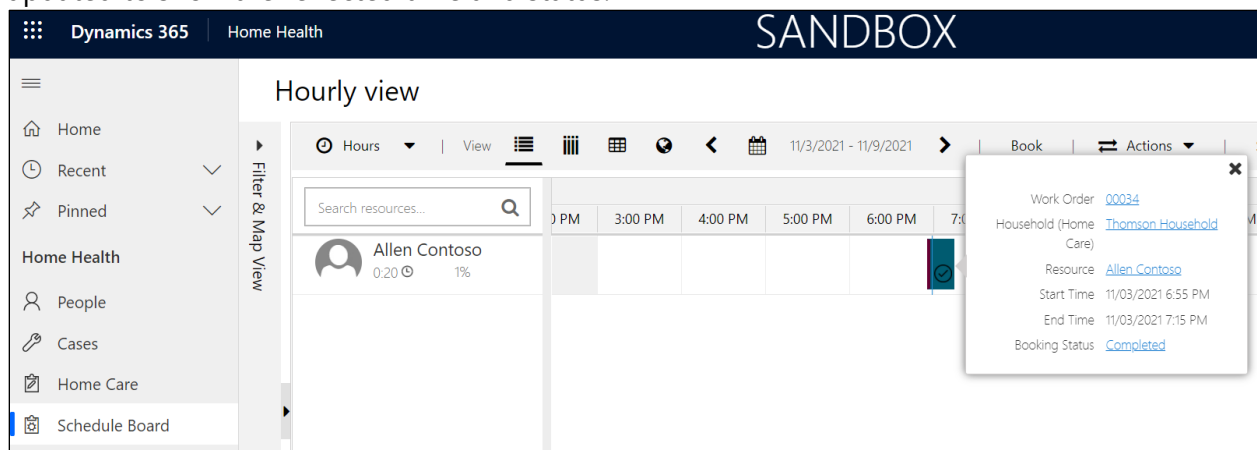
5. Set the **Booking Status** to **Completed** to close the Work Order. Click **Save** in the upper right.



6. The Work order has been completed and the time values have reflected based on the start time and when we completed the order. We are now finished with the mobile app.





7. Navigate back to the **Home Health** app. You'll see on the **schedule board** the work order has been updated to show the reflected time and status.





8. Click **Home Care** on the site map and find **Work Order 00034**. You will see that the **System Status** has been updated to "Completed".

Home Health

 People

 Cases

 Home Care

 Schedule Board

Active Home Cares ▼			
✓	Work Order Number ▼	Household ▼	Substatus ▼ System Status ▼
	00006	Contoso, Ltd.	--- Posted
	00028	Butler Household	--- Unscheduled
	00034	Thomson Household	--- Completed
	00020	Contoso, Ltd.	--- Unscheduled

Congratulations! You have assigned a Home Health Work Order to a Home Health Bookable Resource, made updates to the work order in the Field Service mobile app, and then viewed those changes in the Microsoft Cloud for Healthcare Home Health app. For more information on the Field Service mobile app, see [Install and set up the Field Service \(Dynamics 365\) mobile app | Microsoft Docs](#).

Summary

Nice work! You have completed **Lab 03 – Home Health**.

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

- Create a Bookable Resource
- Configure the Schedule Board
- Leverage Care Management Components with the Field Service Mobile App