



Microsoft Cloud for Healthcare in a Day

Lab 06: Virtual Visits

Step-by-Step Lab

60 minutes

March 2022

Contents

Overview	3
Learning Objectives	3
Prerequisites	3
Virtual Clinic Application	3
Industry Prioritized Scenarios	4
Healthcare Story.....	4
Exercise 1: Configure Virtual Clinic Application	5
Task 1: Create a new Practitioner Specialty for the Patient Portal.....	5
Task 2: Configure Mapped System User on Practitioner Record	7
Task 3: Enable a Practitioner's Schedule.....	8
Task 4: Configure Slots.....	10
Task 5: Configure Environment Variables.....	11
Task 6: Activate Flows and Connection References.....	13
Exercise 2: Configure Microsoft Teams for Virtual Visits	18
Task 1: Install and Set up Microsoft Teams Integration.....	18
Task 2: Embed Virtual Clinic App in Microsoft Teams	24
Exercise 3: Schedule a Virtual Visit	29
Summary	38

Overview

Learning Objectives

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

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

Prerequisites

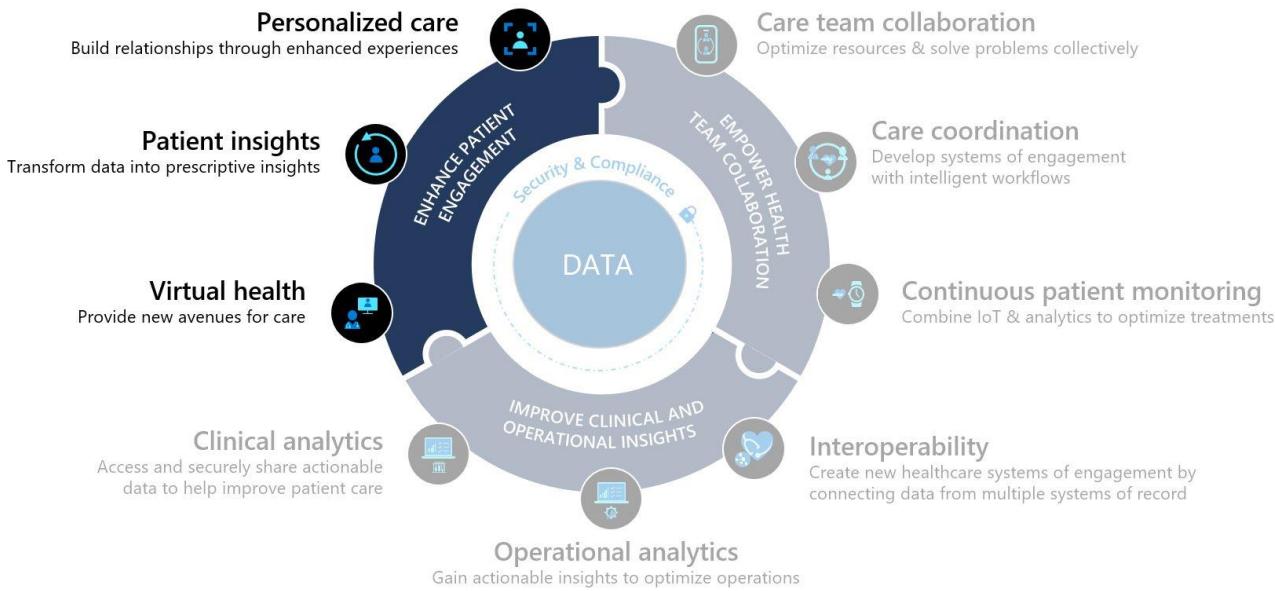
- None

Virtual Clinic Application

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

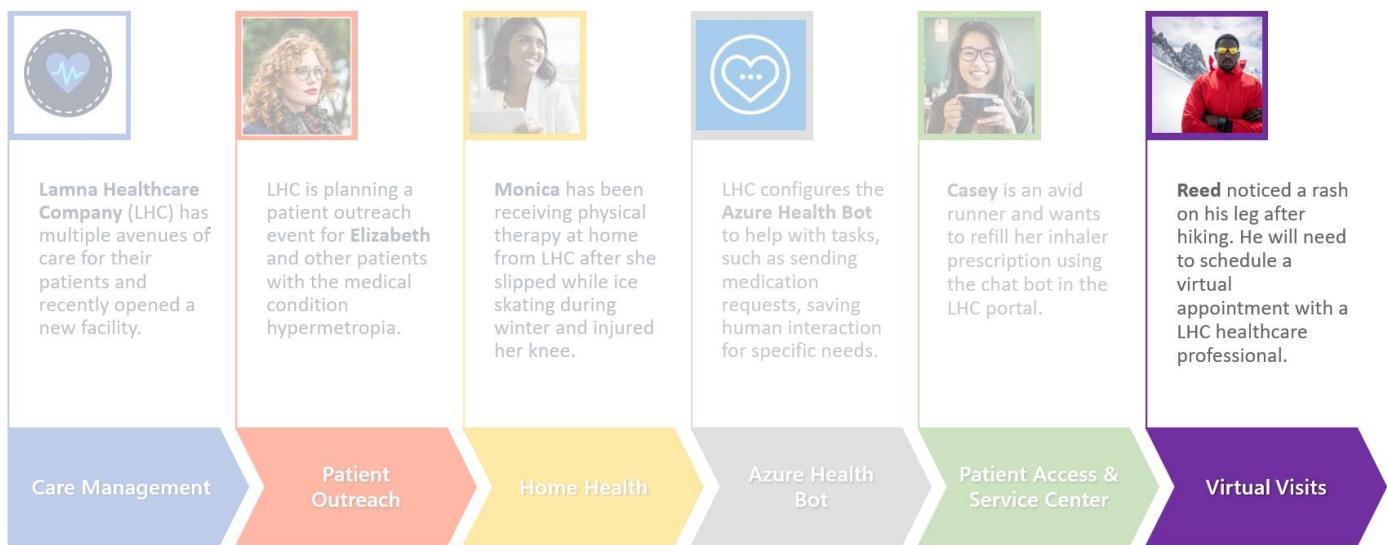
Industry Prioritized Scenarios

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



Healthcare Story

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



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

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

Exercise 1: Configure Virtual Clinic Application

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

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

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

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

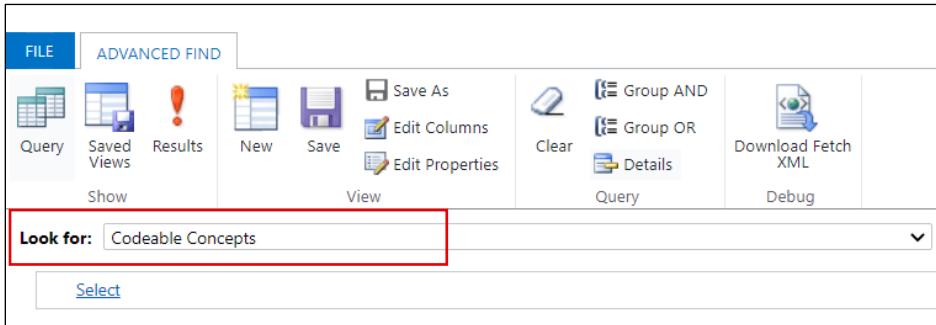
The screenshot shows the 'Instant virtual appointment' screen. On the left, there's a sidebar with navigation links: Home, Find a doctor, Messages, Appointments, Medical records, and Personal information. The 'Personal information' section is expanded. At the top right, there are four buttons: Reason (highlighted with a blue border), Personal, Insurance, and Join. Below these buttons is a section titled 'Select a reason'. There are six cards, each representing a different 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.
- Cardiovascular medicine**: 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.
- Cancer medicine**: Branch of medicine concerned with the prevention, diagnosis, treatment, and study of cancer.
- Orthopedics**: Therapy for the preservation, enhancement, or restoration of movement and physical function impaired or threatened by disease, injury, or disability.

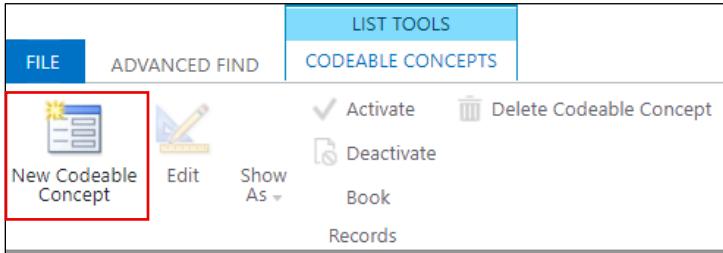
1. Go to <https://make.powerapps.com/>.
2. In the upper right-hand corner, click the **funnel icon** which will open **Advanced Find**.



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

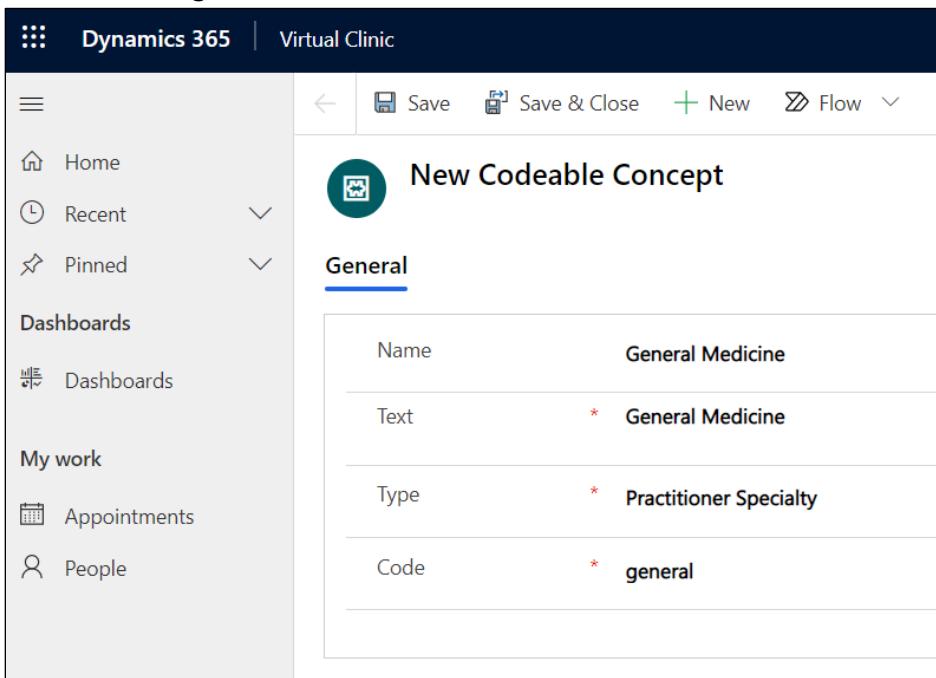


4. Click **New Codeable Concept**.



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

- Name:** General Medicine
- Text:** General Medicine
- Type:** Practitioner Specialty
- 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.

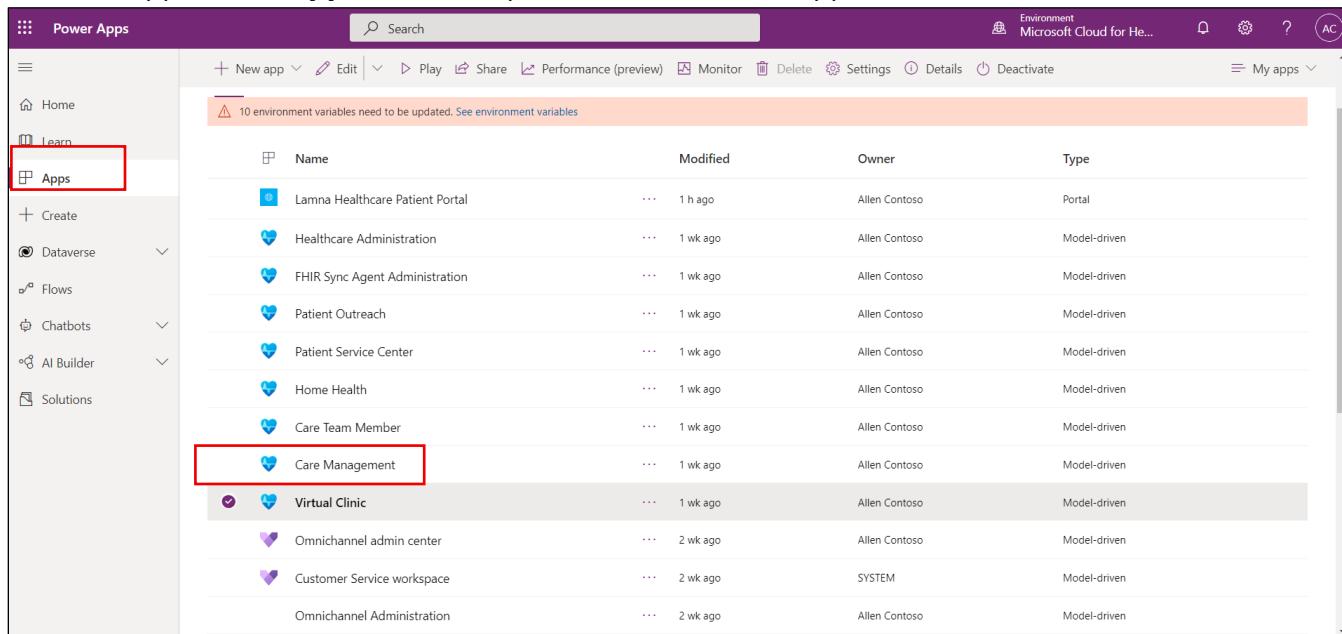
Task 2: Configure Mapped System User on Practitioner Record

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

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

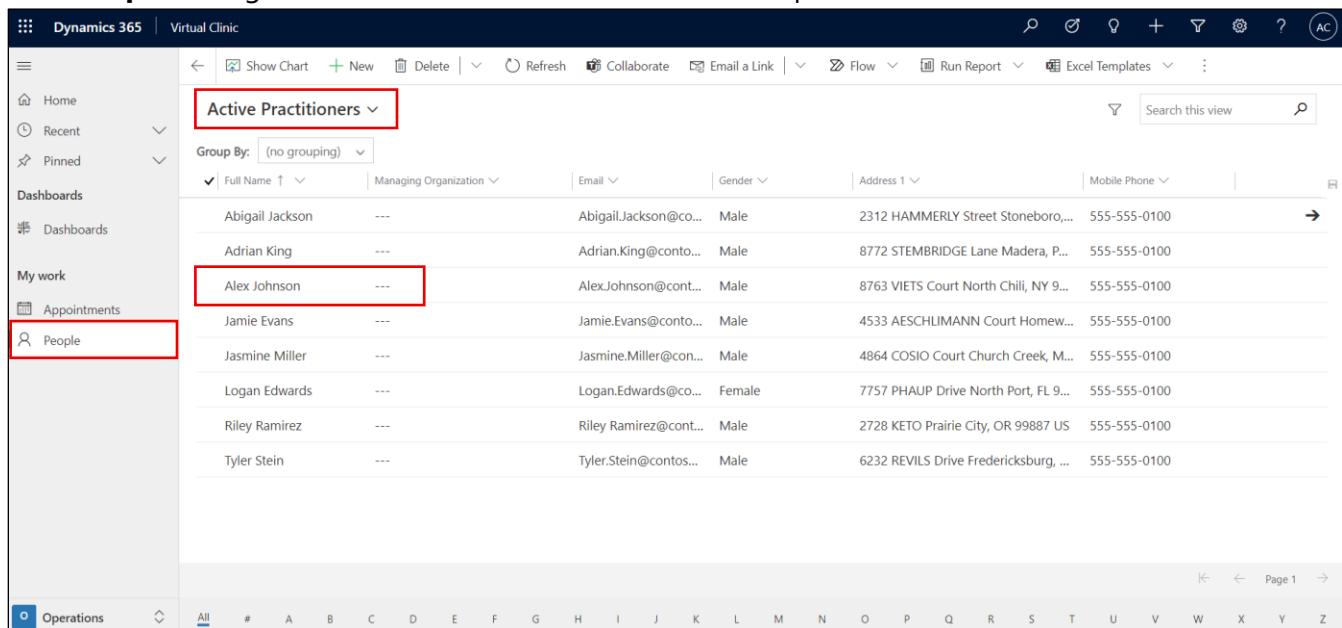
- In the case of virtual appointments, the Teams meeting is created on the mapped user's calendar.
- In the case of instant virtual appointments, the Teams meeting is created on the Organizer (organizer email for virtual appointments) specified in the Admin settings.

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



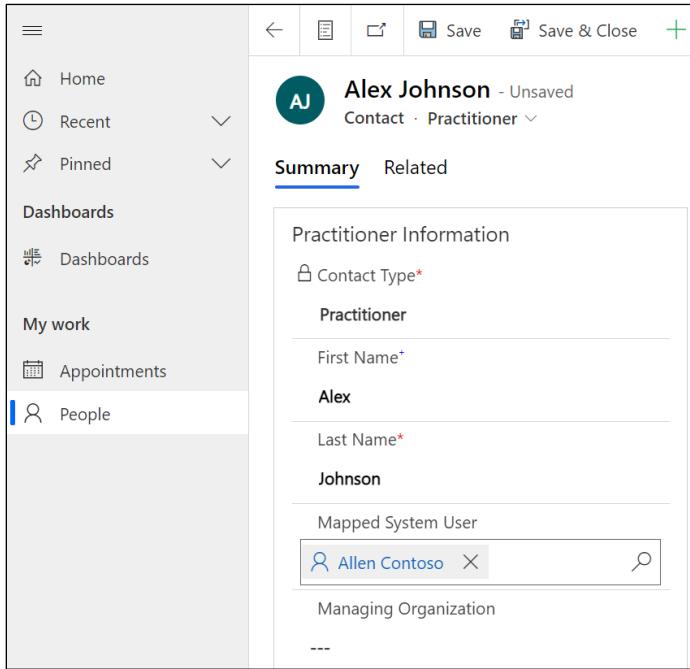
The screenshot shows the Microsoft Power Apps environment. On the left, there is a navigation bar with options like Home, Learn, Apps (which is highlighted with a red box), Create, Dataverse, Flows, Chatbots, AI Builder, and Solutions. The main area displays a list of apps under the heading 'Name'. The 'Virtual Clinic' app is selected and highlighted with a red box. Other apps listed include Lamma Healthcare Patient Portal, Healthcare Administration, FHIR Sync Agent Administration, Patient Outreach, Patient Service Center, Home Health, Care Team Member, Care Management, Virtual Clinic, Omnichannel admin center, Customer Service workspace, and Omnichannel Administration. A message at the top indicates '10 environment variables need to be updated. See environment variables'.

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



The screenshot shows the Dynamics 365 People screen for the 'Virtual Clinic' application. On the left, there is a navigation bar with options like Home, Recent, Pinned, Dashboards, Appointments, and People (which is highlighted with a red box). The main area shows a list of practitioners under the 'Active Practitioners' view. The 'Group By' dropdown is set to '(no grouping)'. The list includes Abigail Jackson, Adrian King, Alex Johnson (which is highlighted with a red box), Jamie Evans, Jasmine Miller, Logan Edwards, Riley Ramirez, and Tyler Stein. Each row contains columns for Full Name, Managing Organization, Email, Gender, Address 1, and Mobile Phone. At the bottom, there is a navigation bar with letters A through Z and a 'Page 1' indicator.

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



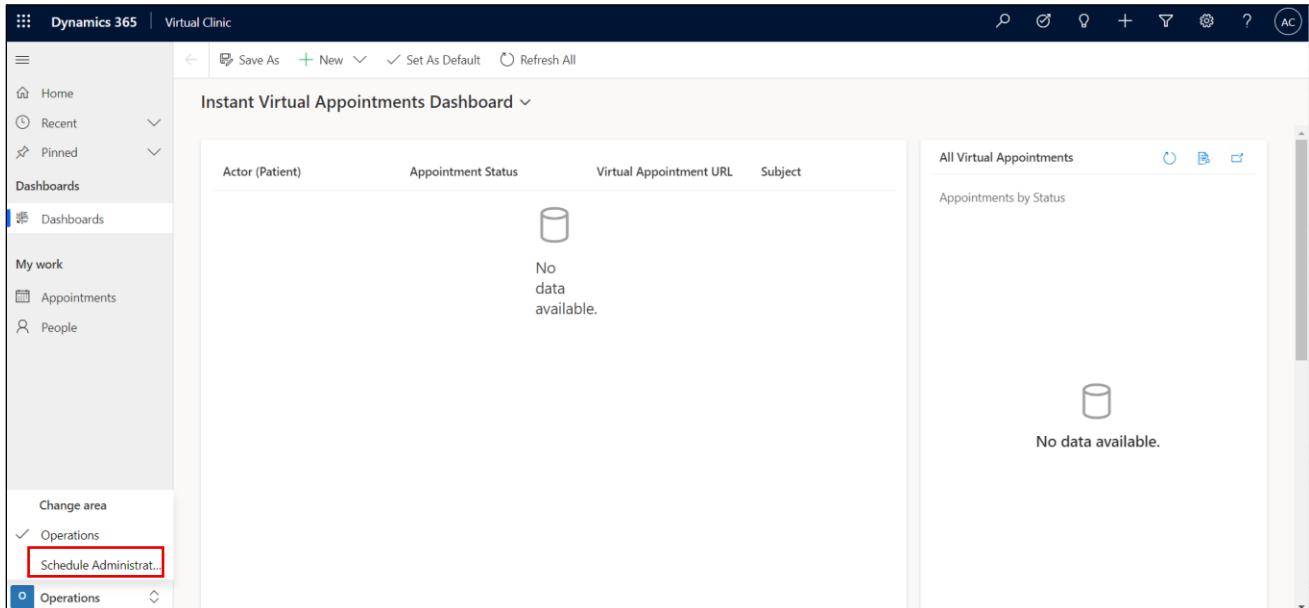
4. Click **Save & Close**.

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

Task 3: Enable a Practitioner's Schedule

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

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



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

Active Schedules

Name	Start Date Time	End Date Time	Practitioner	Health Care Service	Service Category	Location	Created On
Abigail Jackson schedule	---	---	Abigail Jackson	---	---	Contoso Pharmaceut	8/27/2021 4:31 PM
Adrian King schedule	---	---	Adrian King	---	---	Relecloud	8/27/2021 4:31 PM
Alex Johnson schedule	---	---	Alex Johnson	---	---	Best For You Organic	8/27/2021 4:31 PM
Jamie Evans schedule	---	---	Jamie Evans	---	---	Best For You Organic	8/27/2021 4:31 PM
Jasmine Miller schedule	---	---	Jasmine Miller	---	---	Fabrikam Residences	8/27/2021 4:31 PM
Logan Edwards schedule	---	---	Logan Edwards	---	---	Adatum Corporation	8/27/2021 4:31 PM
Riley Ramirez schedule	---	---	Riley Ramirez	---	---	Adatum Corporation	8/27/2021 4:31 PM
Tyler Stein schedule	---	---	Tyler Stein	---	---	VanArnsdel, Ltd.	8/27/2021 4:31 PM

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

Alex Johnson schedule - Unsaved

General Related

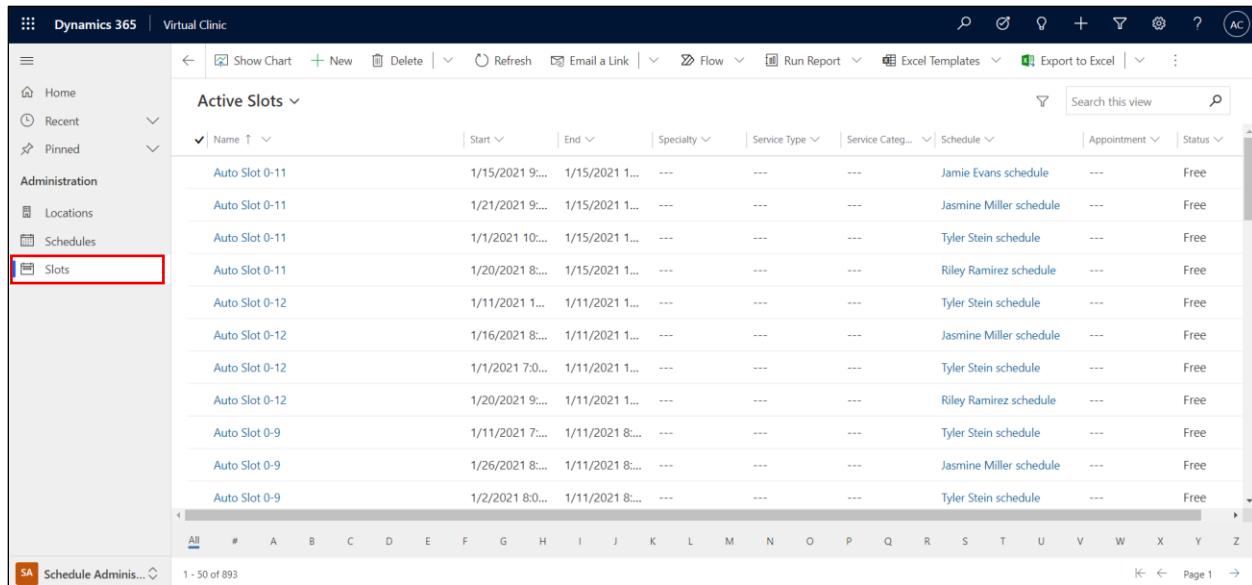
Name	Alex Johnson schedule
Owner	*
Active	Yes
Comment	---
Practitioner	Alex Johnson
Practitioner Role	---
Schedule Number	---

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

Task 4: Configure Slots

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

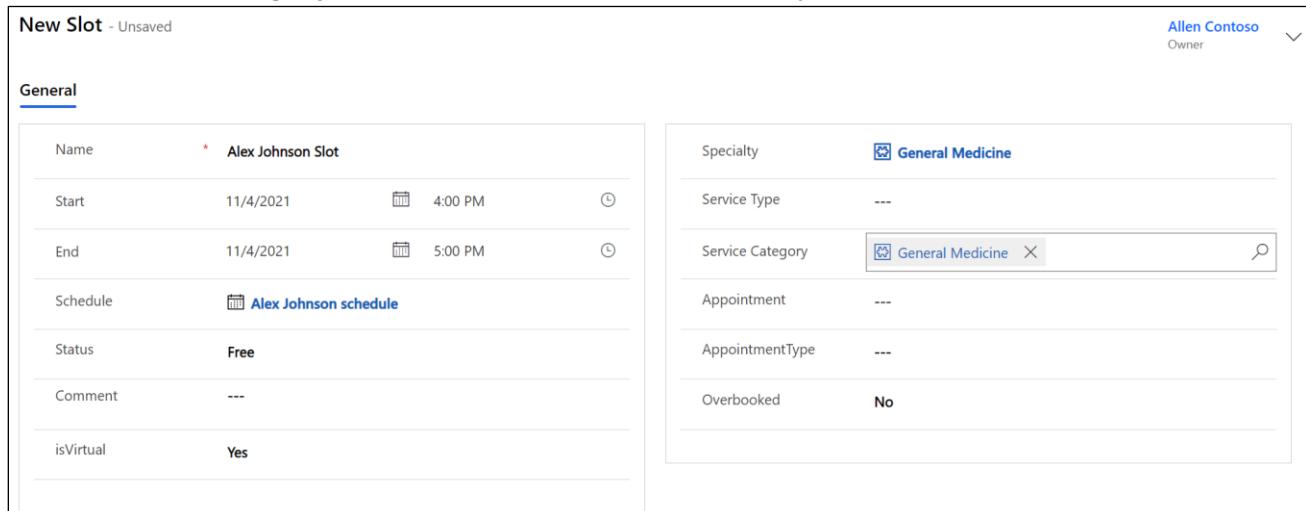
1. In the Virtual Clinic app, select **SLOTS** on the Site Map and click **+ New**.



The screenshot shows the Dynamics 365 Virtual Clinic interface. The left sidebar has sections for Home, Recent, Pinned, Administration (Locations, Schedules, Slots), and Slots (which is selected and highlighted with a red box). The main area is titled 'Active Slots' and lists 15 rows of appointment slots. Each row includes columns for Name, Start, End, Specialty, Service Type, Service Category, Schedule, Appointment, and Status. Most slots are listed under 'Free'. The bottom of the screen shows a navigation bar with letters A-Z and page controls.

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

- Name:** Alex Johnson Slot
- Start:** Today, at a later time
- End:** Today, an hour after the Start
- Schedule:** Alex Johnson schedule
- Status:** Free
- isVirtual:** Yes
- Specialty:** General Medicine (the practitioner specialty record you created)
- Service Category:** General Medicine (same as specialty)



New Slot - Unsaved

General

Name	Alex Johnson Slot
Start	11/4/2021 4:00 PM
End	11/4/2021 5:00 PM
Schedule	Alex Johnson schedule
Status	Free
Comment	---
isVirtual	Yes

Specialty	General Medicine
Service Type	---
Service Category	General Medicine
Appointment	---
AppointmentType	---
Overbooked	No

Allen Contoso
Owner

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

Task 5: Configure Environment Variables

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

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

The screenshot shows the Microsoft Power Apps environment. On the left, there's a navigation bar 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 apps: Lamna Healthcare Patient Portal, Healthcare Administration, FHIR Sync Agent Administration, and Patient Outreach. A red box highlights a message at the top of the app list: '10 environment variables need to be updated. See environment variables'.

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 includes fields for 'Virtual Appointment URL Domain' (with a placeholder 'Enter text') and 'Entity Updater Service Bus URI' (with a placeholder 'Enter text'). Below these, two fields are highlighted with a red box: 'Virtual Visit Secret' (with a placeholder 'Enter text') and 'Virtual Visit Client ID' (with a placeholder 'Enter text'). The 'Virtual Visit Secret' field has a descriptive note: '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.' The 'Virtual Visit Client ID' field has a descriptive note: 'The client ID used to authenticate against the Microsoft Graph API. This identity is used to generate the actual virtual visit.' At the bottom are 'Save and close' and 'Cancel' buttons.

4. **Copy and paste** the following variables:
 - Virtual Visit Secret:** aJm7Q~y_bSlwV0z~pQ0NZ3-zllmhNKJbPzPfa
 - Virtual Visit Client ID:** dfda9044-cb98-4b0f-8086-cd651dbe4af4

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
 The domain of the portal for button links in HTML emails

Entity Updater Service Bus URI

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
 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
 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**

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

Environment variables

Virtual Appointment Scheduler Email

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

The screenshot shows the Power Apps interface with the 'Solutions' section selected. A red box highlights the '+ New solution' button in the top navigation bar. Below it, a message says '8 environment variables need to be updated. See environment variables'. The main table lists several solutions, each with a 'Name' column showing 'HealthcarePatientAc...', 'Created' column showing '8/27/2021', and 'Version' column showing '2.1.3.1'.

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 "LaminaHealthcare", choose the **Default Publisher** and click **Create**.

The screenshot shows the 'New solution' dialog box. It has fields for 'Display name *' (LaminaHealthcare), 'Name *' (LaminaHealthcare), 'Publisher *' (CDS Default Publisher (Cr018ae)), 'Version *' (1.0.0.0), and a 'More options' dropdown. At the bottom are 'Create' and 'Cancel' buttons, with 'Create' highlighted by a red box.

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

The screenshot shows the 'Solutions' blade in the Microsoft Power Platform. At the top, there's a navigation bar with options like 'New solution', 'Edit', 'Delete', 'Export', 'Solution checker', 'Show dependencies', and a three-dot menu. A red banner at the top indicates '10 environment variables need to be updated. See environment variables'. Below the banner, the title 'Solutions' is displayed. A table lists the solution details:

Display name	Name	Created
LamnaHealthcare	LamnaHealthcare	11/11/2021

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

The screenshot shows the 'Add existing' blade. In the left sidebar, under the 'LamnaHe' section, the 'Automation' category is expanded, revealing 'Cloud flow' as an option. Other categories like 'AI Model', 'App', 'Chatbot', 'Dashboard', 'Report', 'Rules', 'Security', and 'Table' are also listed.

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

The screenshot shows the 'Add existing cloud flows' dialog. It displays a list of available cloud flows from the Dataverse. One item, 'CF -> Schedule Teams Meeting for instant and virtual...', is selected and highlighted with a purple checkmark. The dialog includes a search bar, filter buttons for 'From Dataverse' and 'Outside Dataverse', and a table with columns for 'Display name', 'Modified', 'Managed externally?', and 'Status'. At the bottom, there are 'Add' and 'Cancel' buttons.

Display name	Modified	Managed externally?	Status
BookedHomeVisitNotification_Traveling v2	1 mo ago	🔓	Off
BookingCompletion_CloseWorkOrder v2	1 mo ago	🔓	Off
CF -> Cancel Teams Meeting	1 mo ago	🔓	On
CF -> Schedule Teams Meeting for instant and virtual...	1 mo ago	🔓	Off
CF -> Send email for appointment	1 mo ago	🔓	On

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

The screenshot shows the Microsoft Power Automate command bar. The 'Details in a new tab' option is highlighted with a red box. Below the command bar, there is a table listing a single flow named 'CF -> Schedule Teams Meeting for instant and virtual, update record with url and status to booked'. The flow is of type 'Cloud Flow' and was last modified 1 month ago by Allen Contoso.

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

The screenshot shows the 'Edit' screen for the flow. The 'Connection References' section is visible, showing two entries: 'Microsoft Dataverse' and 'Office 365 Users'. The 'Edit' button next to the 'Microsoft Dataverse' entry is highlighted with a red box.

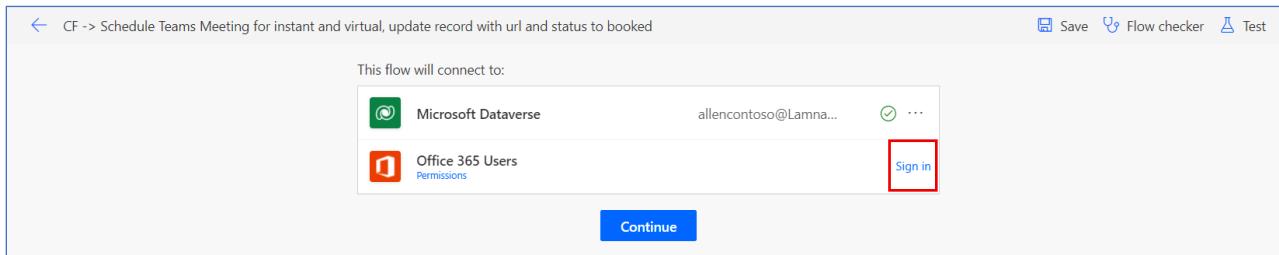
9. Click **Edit**.

The screenshot shows the 'Edit' screen for the flow. The 'Owners' section is visible, showing a list of users. The 'Edit' button next to the user 'Allen Contoso' is highlighted with a red box.

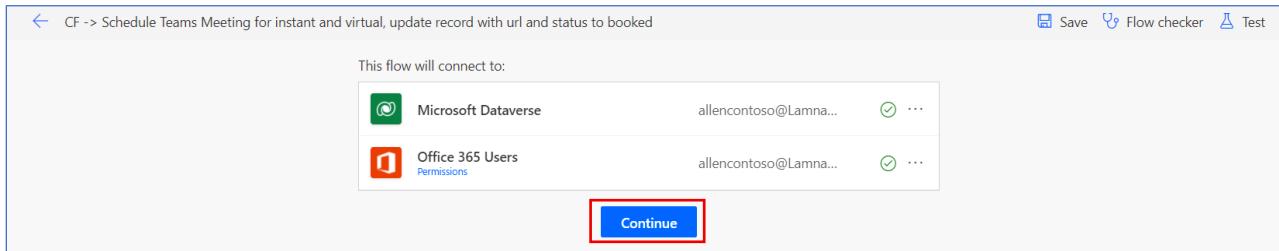
10. Click **Sign in** for **Microsoft Dataverse** to create the Connection Reference.

The screenshot shows the Microsoft Dataverse connection sign-in dialog. It displays the message 'This flow will connect to:' followed by two options: 'Microsoft Dataverse' and 'Office 365 Users'. The 'Sign in' button next to the 'Microsoft Dataverse' option is highlighted with a red box.

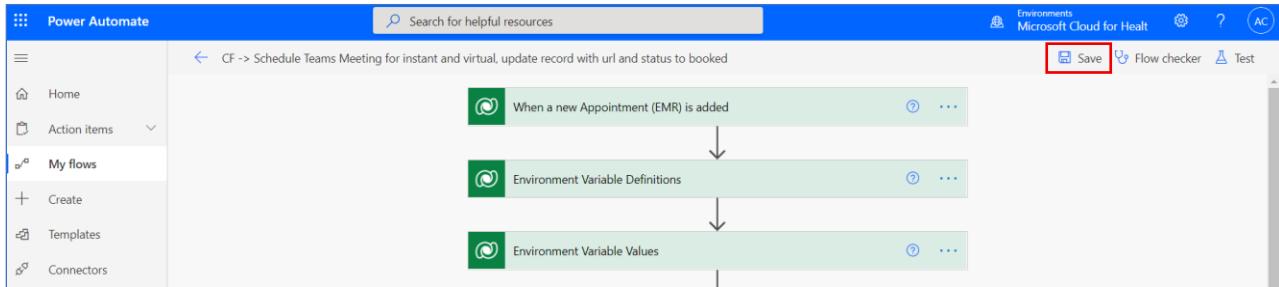
11. Click **Sign in** for Office 365 Users to create the Connection Reference.



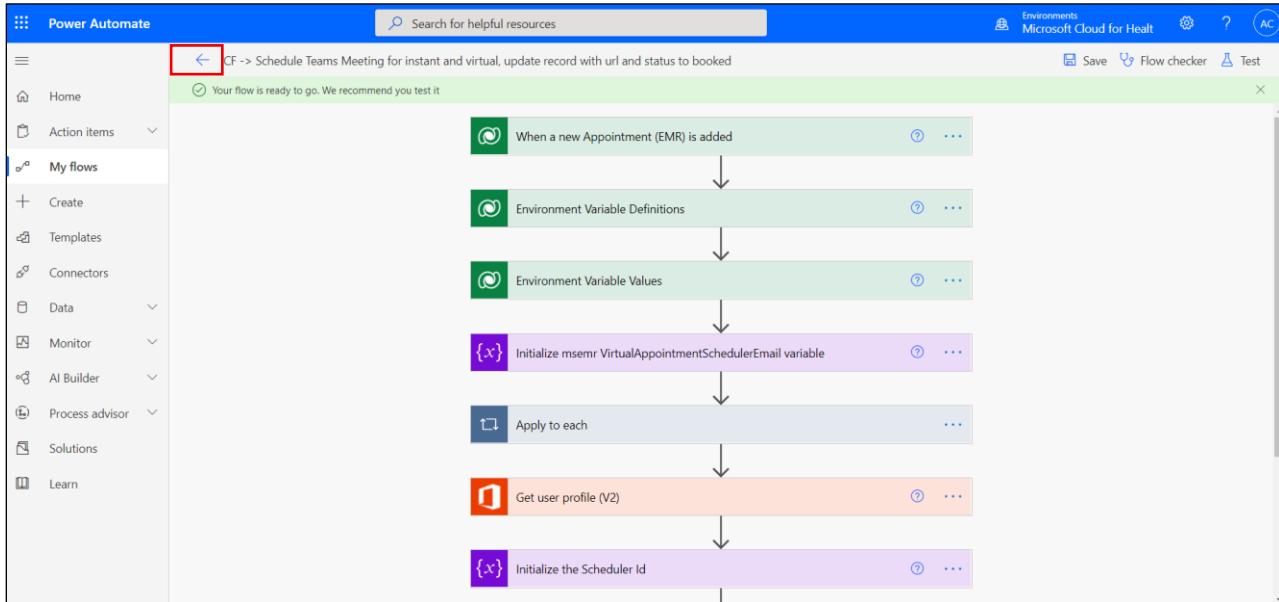
12. Click **Continue**



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



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



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

The screenshot shows the Power Automate interface. On the left, there's a sidebar with options like Home, Action items, My flows, Create, Templates, Connectors, Data, Monitor, AI Builder, Process advisor, Solutions, and Learn. The main area is titled 'Flows > CF -> Schedule Teams Meeting for instant and virtual, update record with url and status to booked'. This section has three tabs: 'Details', 'Connection References', and 'Owners'. The 'Details' tab shows the flow's name, status (Off), owner (Allen Contoso), created date (Nov 16, 05:26 PM), modified date (Jan 7, 08:06 PM), type (Automated), and plan (Per-user plan). The 'Connection References' tab lists 'Microsoft Dataverse' and 'Office 365 Users List' with their respective connection details. The 'Owners' tab shows Allen Contoso as the owner. At the top right, there are buttons for Edit, Turn on (which is highlighted with a red box), Repair tips off, Flow checker, and Help.

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

Exercise 2: Configure Microsoft Teams for Virtual Visits

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

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

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

Task 1: Install and Set up Microsoft Teams Integration

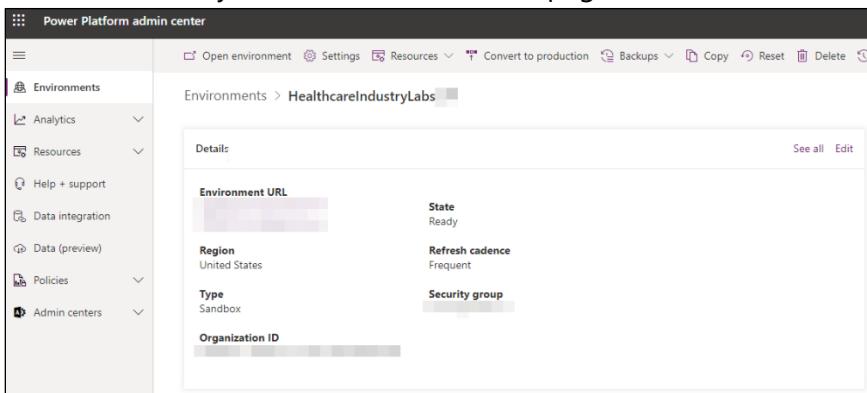
By default, the Basic and Enhanced Microsoft Teams integration is disabled for customer engagement apps in Dynamics 365. In this Task, we will enable Microsoft Teams in Dynamics 365.

1. Go to <https://admin.powerplatform.microsoft.com/>.
2. Select your Microsoft Cloud for Healthcare environment from the list

Environments

Environment	Type
HealthcareIndustryLabs 	Sandbox

3. You will land on your environments detail page.



The screenshot shows the 'Power Platform admin center' interface. On the left is a navigation sidebar with options like Environments, Analytics, Resources, Help + support, Data integration, Data (preview), Policies, and Admin centers. The main area is titled 'Environments > HealthcareIndustryLabs'. It shows a 'Details' card with the following information:

- Environment URL: [redacted]
- Region: United States
- Type: Sandbox
- State: Ready
- Refresh cadence: Frequent
- Security group: [redacted]
- Organization ID: [redacted]

At the top of the main area, there are buttons for Open environment, Settings, Resources, Convert to production, Backups, Copy, Reset, and Delete.

4. Click the **Settings** button on the top command bar.

Environments > HealthcareIndustryLabs

5. Expand **Integration** and click **Teams integration settings**.

- Search for a setting
- Product
- Business
- Users + permissions
- Audit and logs
- Templates
- Email
- Integration
- Synchronization
- Teams integration settings**
- Yammer
- Data management
- Encryption

6. On the **Microsoft Teams collaboration and chat** page, switch **Turn on the linking of Dynamics 365 records to Microsoft Teams channels** to **Yes**.

Microsoft Teams collaboration and chat
Seamlessly collaborate with Dynamics 365 team members.

Turn on the linking of Dynamics 365 records to Microsoft Teams channels
Allows pinning of records and views in the Dynamics 365 model-driven app to Teams channels as well as integration of Dynamics 365 and Teams documents. [Learn more](#)

Yes

No

Turn on Enhanced Microsoft Teams Integration
Allows pinning of records and views to a Teams channel directly from Dynamics 365 and suggests members to be added. Requires tenant admin permissions. [Learn more](#)

No

Turn on Confidential Labels
Create private Teams and add sensitivity/confidentiality labels in the Enhanced Microsoft Teams Integration.

No

Turn on Microsoft Teams chats inside Dynamics 365 (preview)
Engage in Teams chats with coworkers right from Dynamics 365. Requires tenant admin permissions. [Learn more](#). This feature is in preview and subject to [preview terms](#).

No

Use record title as the default chat name for linked chats
Use record title as the default chat name for Teams chats created in Dynamics 365 and linked to Dynamics 365 records. When this is turned off, linked chats will use the participants' names as the default chat name.

No

Save

7. Click the **Save** button at the bottom left.

Microsoft Teams collaboration and chat
 Seamlessly collaborate with Dynamics 365 team members.

Turn on the linking of Dynamics 365 records to Microsoft Teams channels Yes
 Allows pinning of records and views in the Dynamics 365 model-driven app to Teams channels as well as integration of Dynamics 365 and Teams documents. [Learn more](#)

Turn on Enhanced Microsoft Teams Integration No
 Allows pinning of records and views to a Teams channel directly from Dynamics 365 and suggests members to be added. Requires tenant admin permissions. [Learn more](#)

Turn on Confidential Labels No
 Create private Teams and add sensitivity/confidentiality labels in the Enhanced Microsoft Teams Integration.

Turn on Microsoft Teams chats inside Dynamics 365 (preview) No
 Engage in Teams chats with coworkers right from Dynamics 365. Requires tenant admin permissions. [Learn more](#). This feature is in preview and subject to [preview terms](#).

Use record title as the default chat name for linked chats No
 Use record title as the default chat name for Teams chats created in Dynamics 365 and linked to Dynamics 365 records. When this is turned off, linked chats will use the participants' names as the default chat name.

Save 

8. After the page finishes saving, switch **Turn on Enhanced Microsoft Teams Integration** to **Yes**.

Microsoft Teams collaboration and chat
 Seamlessly collaborate with Dynamics 365 team members.

Turn on the linking of Dynamics 365 records to Microsoft Teams channels Yes
 Allows pinning of records and views in the Dynamics 365 model-driven app to Teams channels as well as integration of Dynamics 365 and Teams documents. [Learn more](#)

Turn on Enhanced Microsoft Teams Integration Yes
 Allows pinning of records and views to a Teams channel directly from Dynamics 365 and suggests members to be added. Requires tenant admin permissions. [Learn more](#)

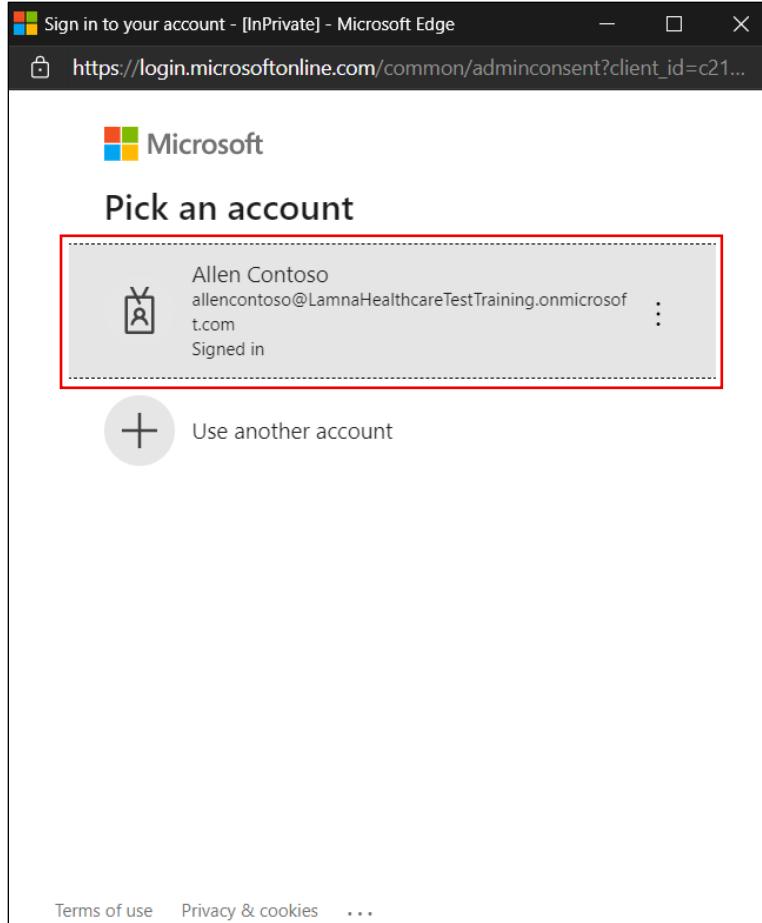
Turn on Confidential Labels No
 Create private Teams and add sensitivity/confidentiality labels in the Enhanced Microsoft Teams Integration.

Turn on Microsoft Teams chats inside Dynamics 365 (preview) No
 Engage in Teams chats with coworkers right from Dynamics 365. Requires tenant admin permissions. [Learn more](#). This feature is in preview and subject to [preview terms](#).

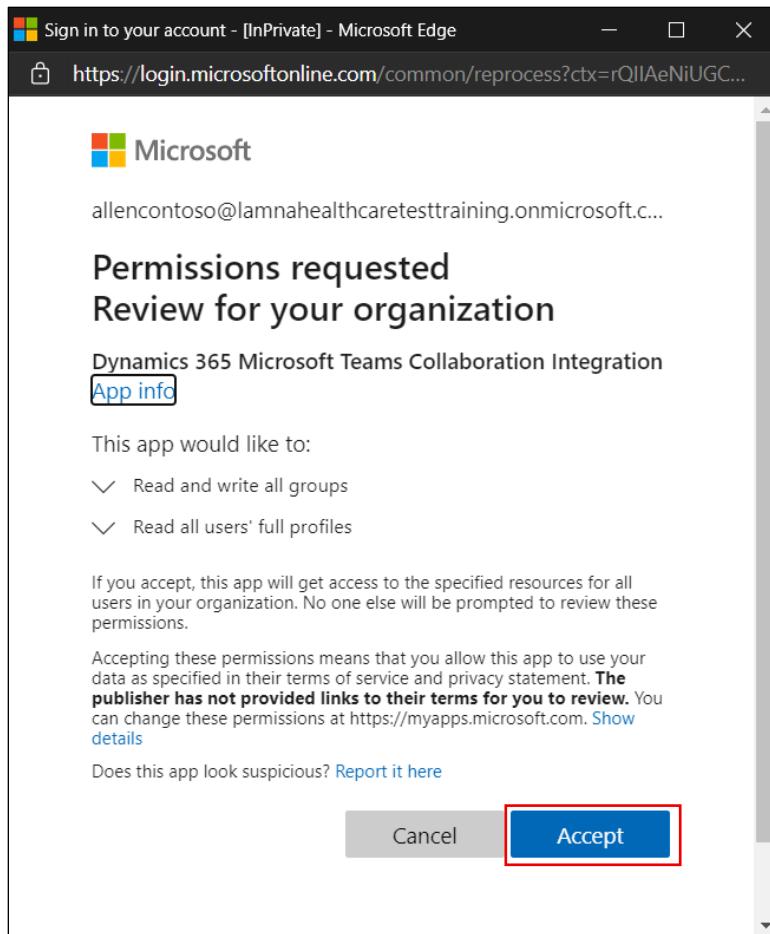
Use record title as the default chat name for linked chats No
 Use record title as the default chat name for Teams chats created in Dynamics 365 and linked to Dynamics 365 records. When this is turned off, linked chats will use the participants' names as the default chat name.

Save 

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



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



11. Once the dialog disappears, Click the **Save** button at the bottom left.

A screenshot of the "Microsoft Teams collaboration and chat" settings page. The title is "Microsoft Teams collaboration and chat" with the subtitle "Seamlessly collaborate with Dynamics 365 team members.". There are four main settings with toggle switches:

- "Turn on the linking of Dynamics 365 records to Microsoft Teams channels": Yes (selected)
- "Turn on Enhanced Microsoft Teams Integration": Yes (selected)
- "Turn on Confidential Labels": No (selected)
- "Turn on Microsoft Teams chats inside Dynamics 365 (preview)": No (selected)

At the bottom left is a blue "Save" button, which is highlighted with a red box.

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

Microsoft Teams collaboration and chat

Seamlessly collaborate with Dynamics 365 team members.

Turn on the linking of Dynamics 365 records to Microsoft Teams channels

Allows pinning of records and views in the Dynamics 365 model-driven app to Teams channels as well as integration of Dynamics 365 and Teams documents. [Learn more](#)

Yes

Turn on Enhanced Microsoft Teams Integration

Allows pinning of records and views to a Teams channel directly from Dynamics 365 and suggests members to be added. Requires tenant admin permissions. [Learn more](#)

Yes

Turn on Confidential Labels

Create private Teams and add sensitivity/confidentiality labels in the Enhanced Microsoft Teams Integration.

No

Turn on Microsoft Teams chats inside Dynamics 365 (preview)

Engage in Teams chats with coworkers right from Dynamics 365. Requires tenant admin permissions. [Learn more](#). This feature is in preview and subject to [preview terms](#).

No

Use record title as the default chat name for linked chats

Use record title as the default chat name for Teams chats created in Dynamics 365 and linked to Dynamics 365 records. When this is turned off, linked chats will use the participants' names as the default chat name.

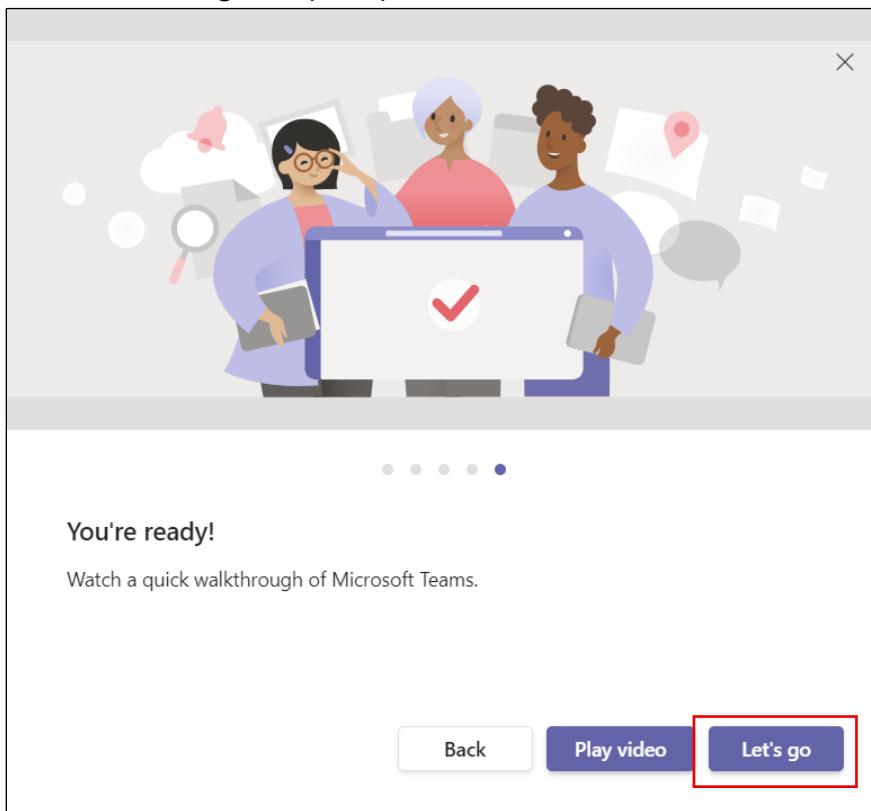
No

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

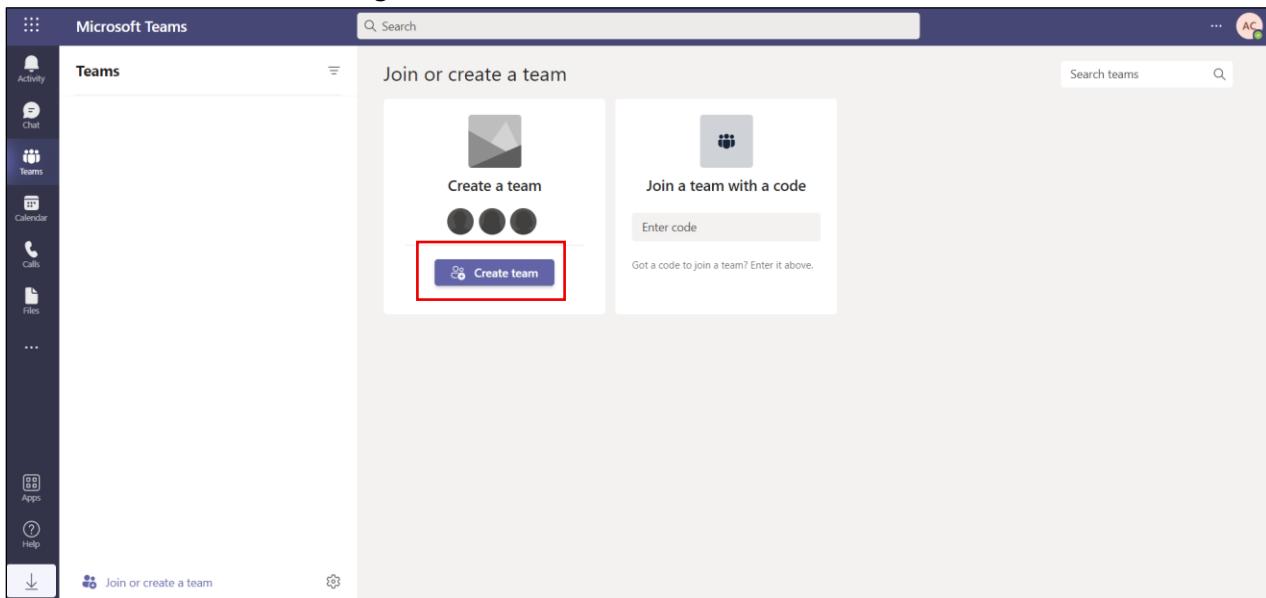
Task 2: Embed Virtual Clinic App in Microsoft Teams

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. Select **From scratch**.

Create a team

From scratch

We'll help you create a basic team.

From a group or team

Create your team from an Microsoft 365 group that you own or from another...

Select from a template

 Manage a Project General Coordinate your project.	 Manage an Event General Improve your event management and collaboration.
 Onboard Employees General Create a central experience to onboard	 Adopt Office 365 General Create a Champion community to drive

[What's a team?](#)

5. Select **Public**.

What kind of team will this be?

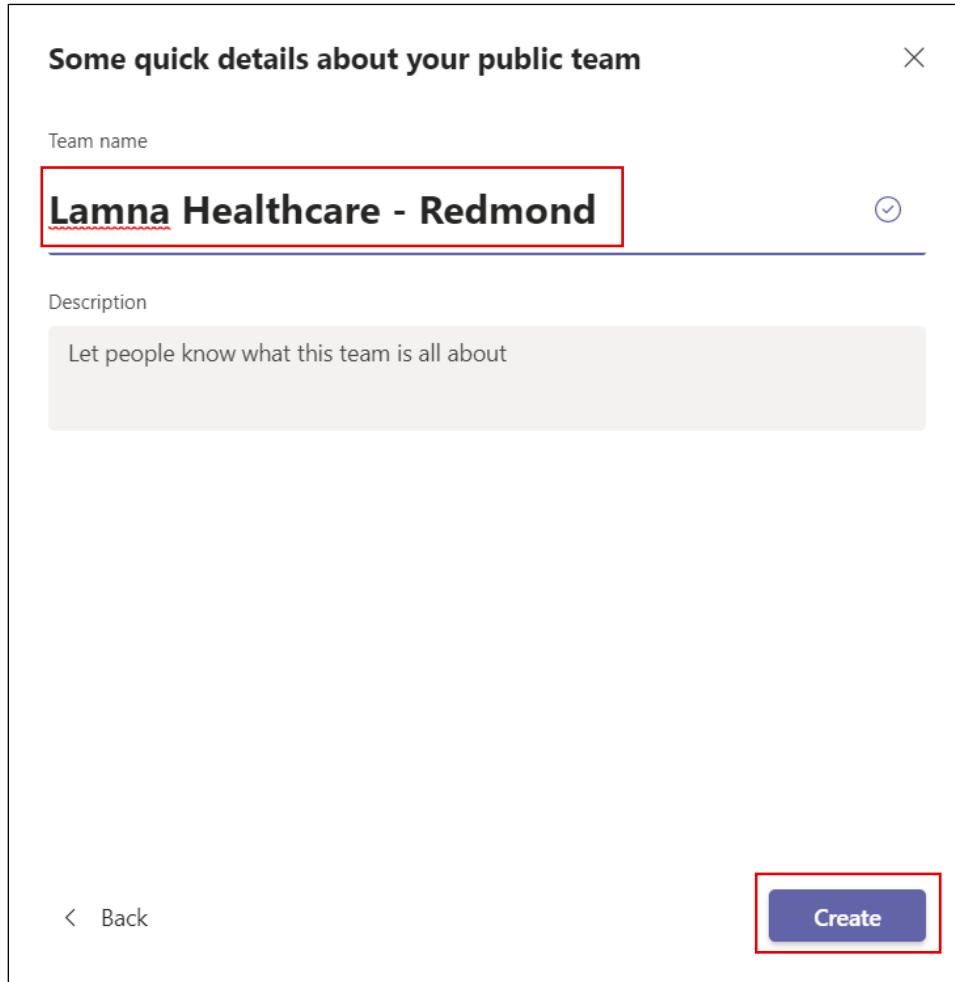
Private
People need permission to join

Public
Anyone in your org can join

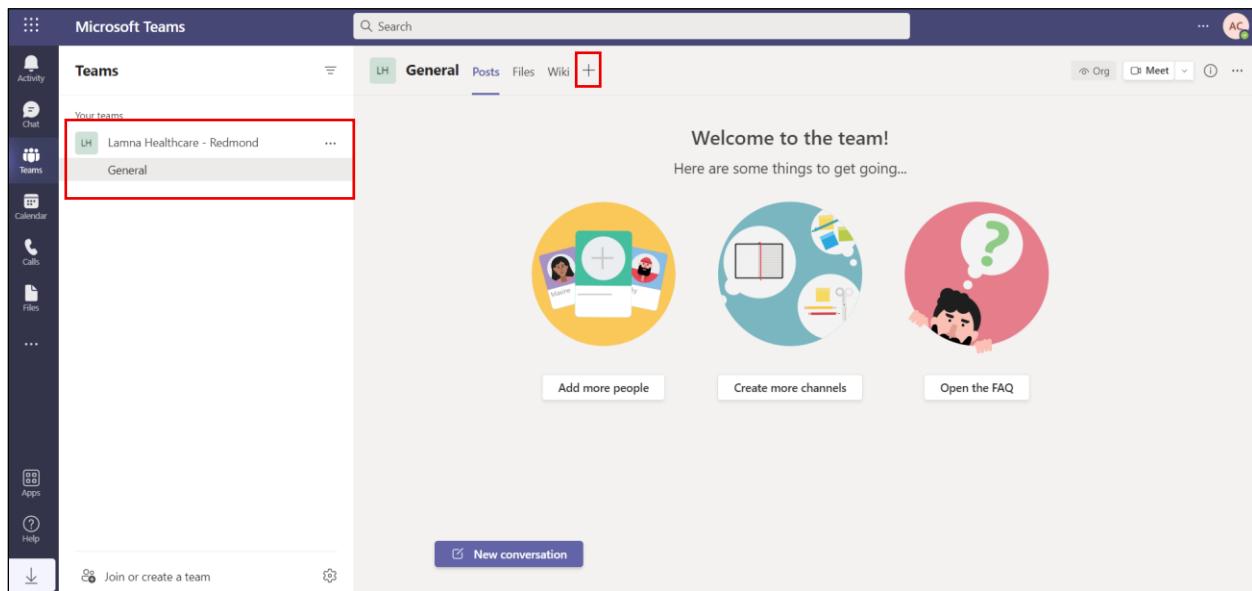
Org-wide
Everyone in your organization automatically joins

< Back

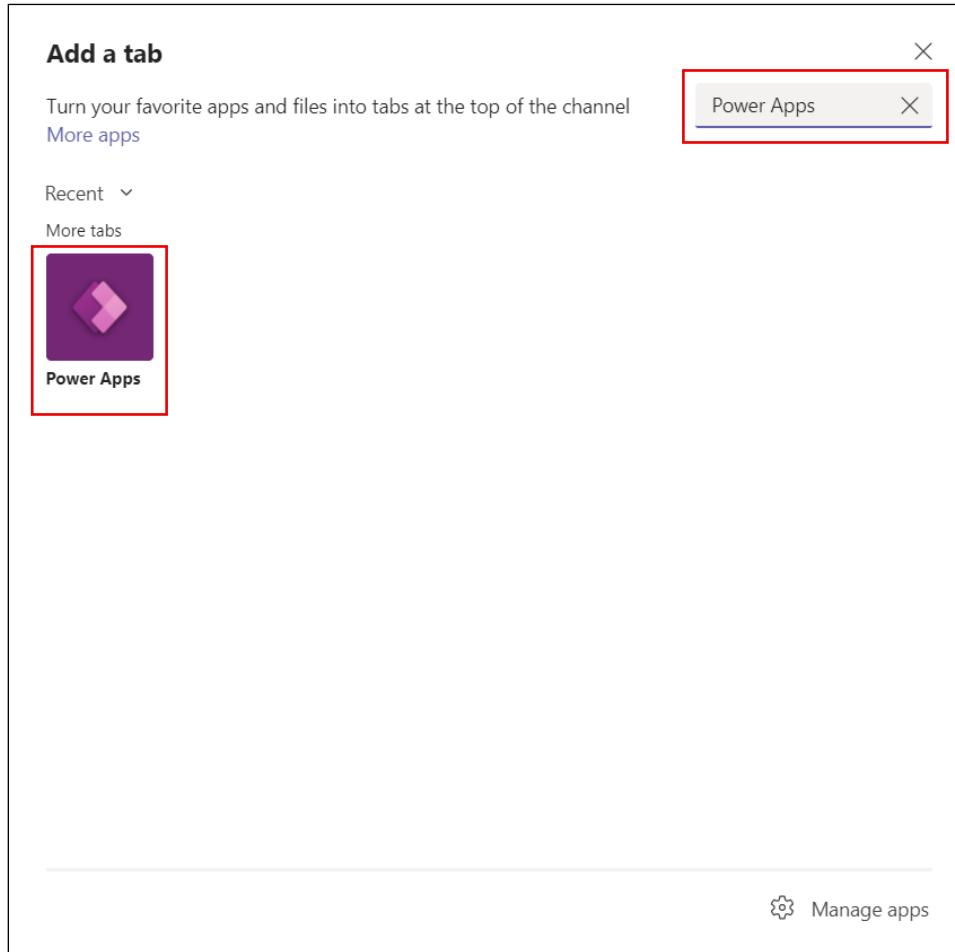
6. Name the Team "**Lamna Healthcare – Redmond**" and click **Create**. You may skip add members step.



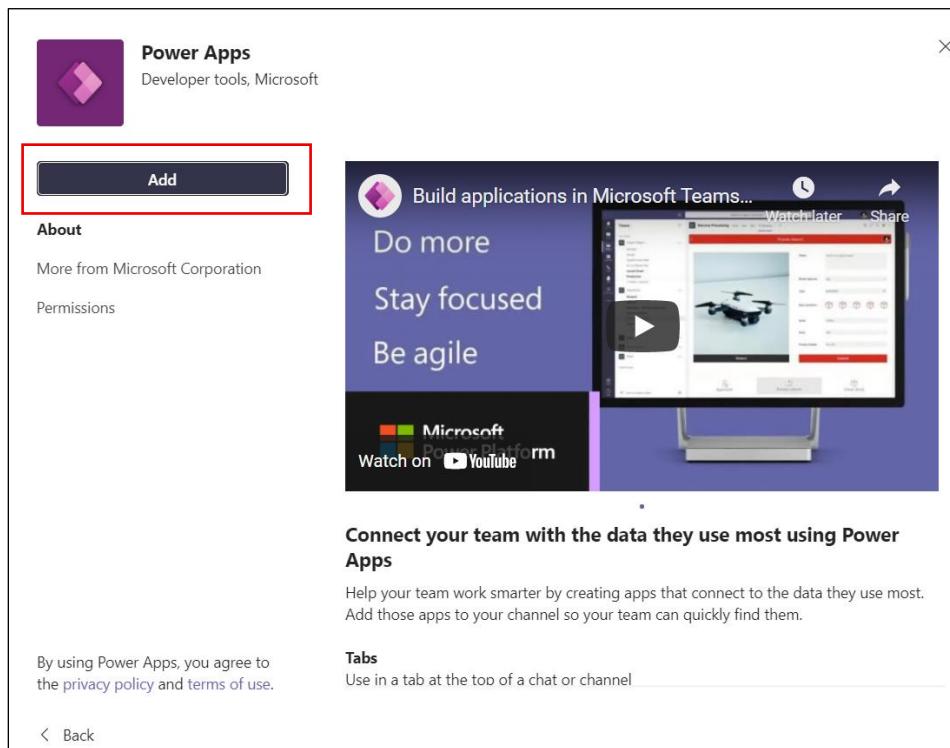
7. Once the Team is created and the **General channel** selected, click the **+** button to add a tab



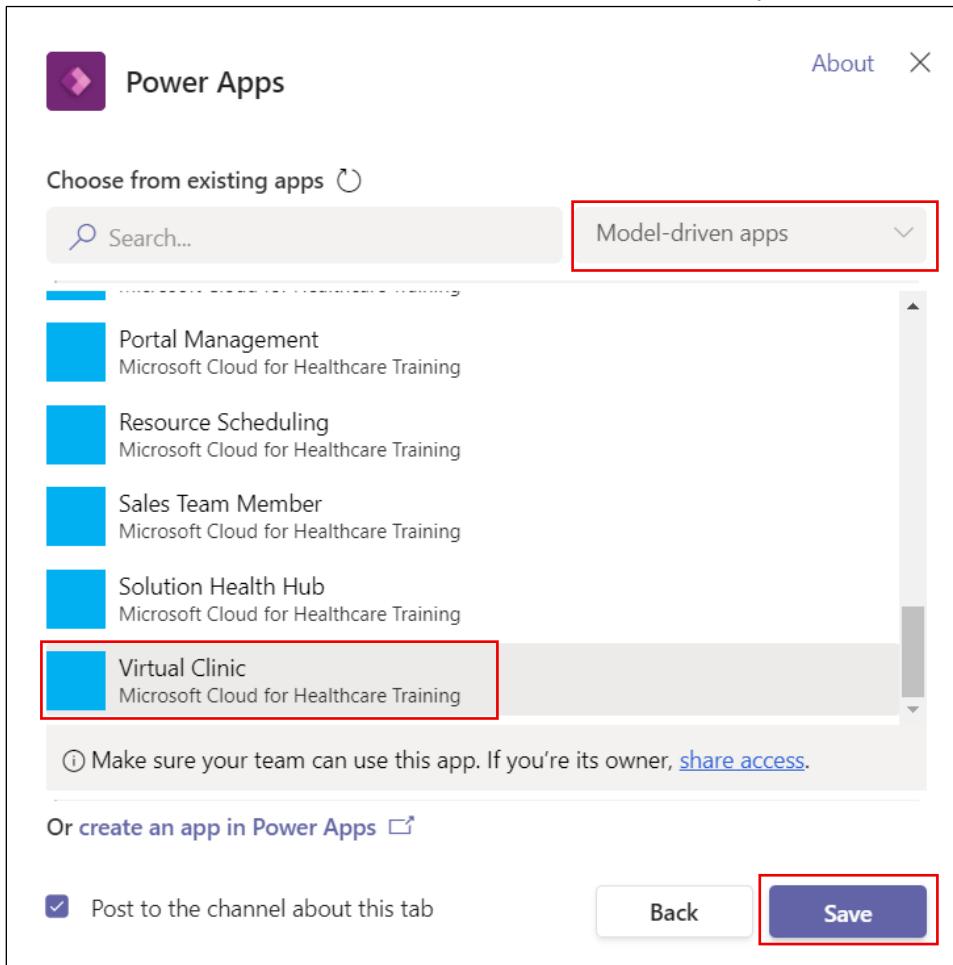
8. Search for "Power Apps" and select **Power Apps**



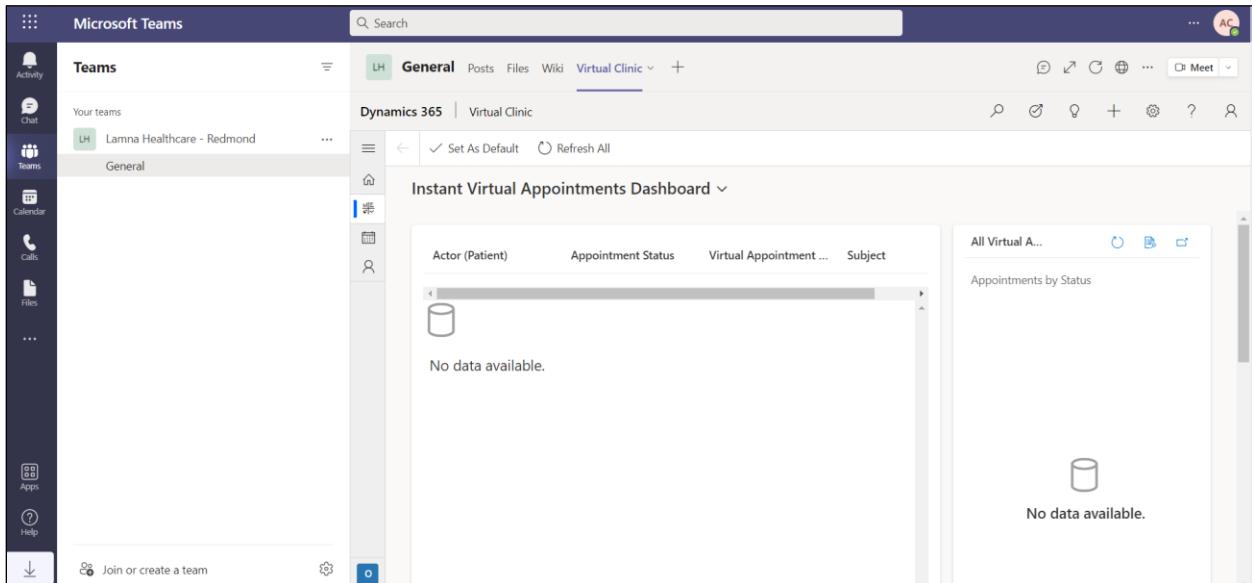
9. Click **Add**



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



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



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

Exercise 3: Schedule a Virtual Visit

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

Task 1: Schedule an Instant Virtual Appointment

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

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

The screenshot shows the 'Apps' section of the Microsoft Power Apps interface. At the top, there are tabs for 'Apps' (which is selected) and 'Component libraries (preview)'. A red warning bar at the top indicates '10 environment variables need to be updated. See environment variables'. Below this, a table lists five apps:

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

3. Open Reed Flores' record and select **Create Invitation** on the command bar.

The screenshot shows the Microsoft Dynamics 365 Contact record for 'Reed Flores'. The command bar at the top includes options like Save, Save & Close, New, Lists and segments, Connect, Assign, Email a Link, Delete, and Create Invitation. The contact details shown are: Date of Birth (10/11/1984), Gender (Male), Marital Status (---), and Primary Practitioner (Alex Johnson). The record is saved.

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

The screenshot shows the Microsoft Dynamics 365 Contact record for 'Reed Flores' again, but this time the 'Advanced' tab is selected in the ribbon. Under the 'General' tab, there is a section labeled 'Invitation' which contains an 'Invitation Code' field. The code is displayed as a long string of characters: 'yGcZcxNEkgKDAQ5mPBHLJH0bQvSBnbkLecKPO4DJeZ2DICF...'. The rest of the page shows the standard contact details and navigation buttons.

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

The screenshot shows the Power Apps portal interface. At the top, there's a navigation bar with 'Apps' and 'Component libraries (preview)'. Below it, a red warning bar says '⚠️ 10 environment variables need to be updated. See environment variables'. The main area is a table titled 'Name' with columns for 'Name', 'Modified', and three dots. It lists four items:

Name	Modified
Lamna Healthcare Patient Portal	49 min ago
Care Management	1 wk ago
Sync admin for FHIR	1 wk ago
Healthcare Administration	1 wk ago

6. Select **Sign in**.



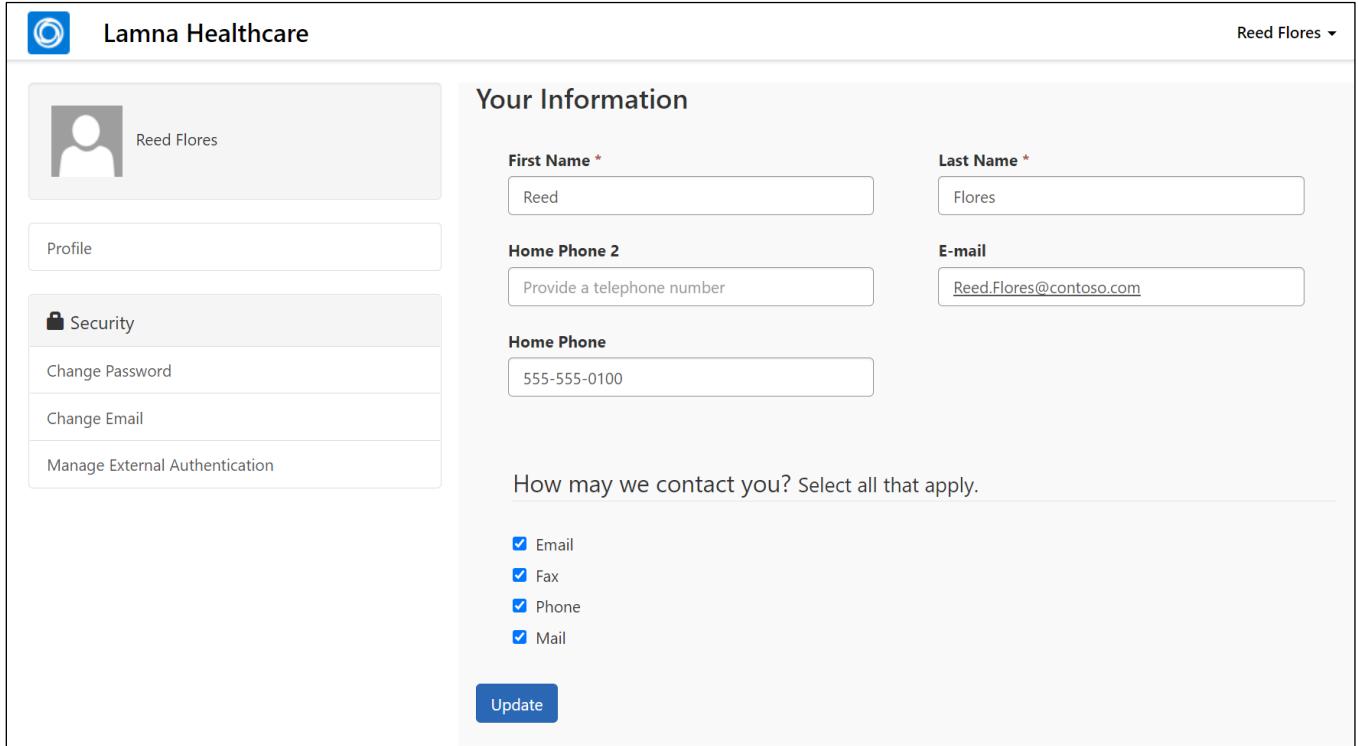
7. Select the **Redeem Invitation** tab, enter the **Invitation code**, and click **Register**.

The screenshot shows the Lamna Healthcare registration page. At the top, there are three tabs: 'Sign in', 'Register', and 'Redeem invitation'. The 'Redeem invitation' tab is selected. Below it, there's a section for signing up with an invitation code. A text input field contains the invitation code: 'yGcZcxNEkgKDAQ5mPBHLJH0bQvSBnbkLecKPO4DJeZ2DICFXXk3bwQOVhC2dU73ruac1fhr42E4sMQOalqQaEM2XLt7Ze-wVwCkEvSxP6WoIETqnB0Vf4'. There's also a checkbox for 'I have an existing account' and a 'Register' button.

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

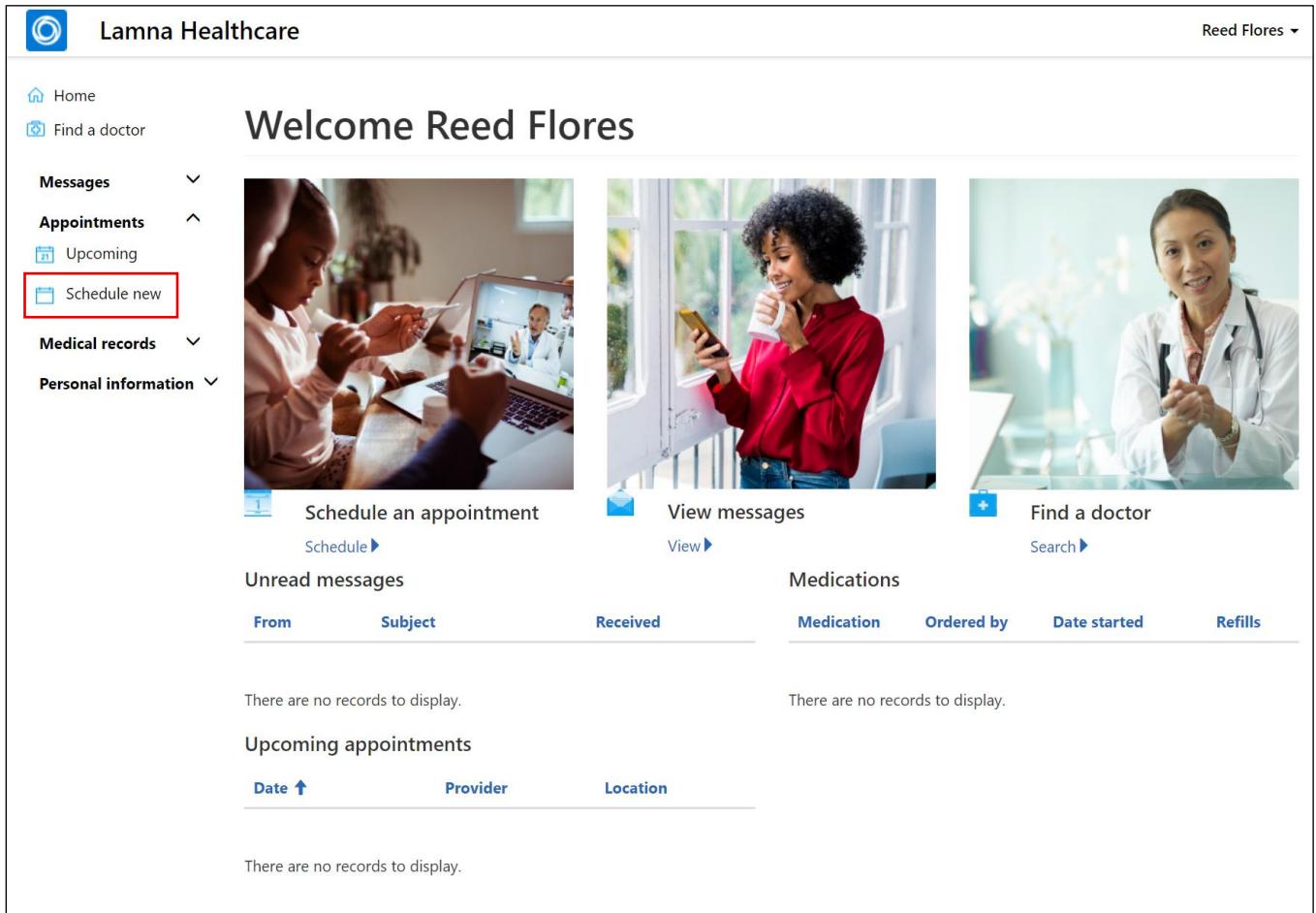
The screenshot shows the Lamna Healthcare registration page for Reed Flores. At the top, there are three tabs: 'Sign in', 'Register', and 'Redeem invitation'. The 'Register' tab is selected. Below it, there are two sections: 'Register for a new local account' and 'Register using an external account'. Under 'Local Account', fields are filled with 'Email: Reed.Flores@contoso.com', 'Username: ReedFlores', 'Password:', and 'Confirm password:'. Under 'External Account', there's a 'Azure AD' button. At the bottom is a 'Register' button.

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



The screenshot shows the Lamna Healthcare profile page for Reed Flores. On the left, there's a sidebar with options like Profile, Security, Change Password, Change Email, and Manage External Authentication. The main area is titled "Your Information" and contains fields for First Name (Reed), Last Name (Flores), Home Phone 2 (a placeholder), Home Phone (555-555-0100), and E-mail (Reed.Flores@contoso.com). Below these is a section asking how to contact the user, with checkboxes for Email, Fax, Phone, and Mail, all of which are checked. At the bottom is a blue "Update" button.

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



The screenshot shows the Lamna Healthcare homepage. On the left, a sidebar menu is open, showing "Messages", "Appointments" (which is expanded, showing "Upcoming" and "Schedule new", with "Schedule new" highlighted by a red box), "Medical records", and "Personal information". The main content area is titled "Welcome Reed Flores" and features three images: a child using a laptop for a video call, a woman using a smartphone, and a doctor smiling. Below each image are links: "Schedule an appointment", "View messages", and "Find a doctor". The "Schedule an appointment" link has a small "1" icon above it. The "Unread messages" and "Medications" sections are shown below, both indicating "There are no records to display". The "Upcoming appointments" section also indicates "There are no records to display".

11. Select **Instant virtual appointment**.

The screenshot shows the Lamna Healthcare website interface. On the left, there's a sidebar with links for Home, Find a doctor, Messages, Appointments (which is expanded), Medical records, and Personal information. The main content area has a heading "Schedule a new appointment" and a sub-section "Schedule as soon as possible". Inside this section, a box highlights the "Instant virtual appointment" option, which is described as a video conference call with the next available provider. Below this, another box shows "Virtual appointment" and "Clinic appointment" options. A red box surrounds the "Instant virtual appointment" box.

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

The screenshot shows the "Instant virtual appointment" selection screen. At the top, there are four tabs: Reason (which is selected and highlighted with a blue border), Personal, Insurance, and Join. Below these tabs, there's a heading "Select a reason" followed by a grid of medical specialties. The "General medicine" option is highlighted with a red box. Each specialty has a brief description below it. The "General medicine" section also contains the text "General Medicine".

13. On the Personal tab, Reed Flores' personal information should auto-populate. Scroll down and click **Next** to go to the next section. It may take a moment for the button to enable.

The screenshot shows a section for personal information. On the left is a "Previous" button, and on the right is a large blue "Next" button. The "Next" button is highlighted with a red box.

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

Lamna Healthcare

Reed Flores ▾

Home Find a doctor

Messages Appointments Medical records Personal information

Instant virtual appointment

Reason Personal Insurance Join

+ Add Insurance

Previous

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

Lamna Healthcare

Reed Flores ▾

Home Find a doctor

Messages Appointments Medical records Personal information

Instant virtual appointment

Reason Personal Insurance Join

Subscriber / Policy Holder: Reed Flores

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

16. Click **Next**.

Lamna Healthcare

Reed Flores ▾

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.

Choose Files No file chosen

Previous Next

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

The screenshot shows the Lamna Healthcare app interface. At the top, there's a navigation bar with icons for Home and Find a doctor, and a user profile for Reed Flores. Below this is a sidebar with dropdown menus for Messages, Appointments, Medical records, and Personal information. The main content area is titled "Instant virtual appointment". It displays a message "You are all set to join!" followed by an error message: "Error: Provider's consent terms not found." with a checked checkbox. A large red box surrounds the "Join queue" button at the bottom of the form. At the very bottom, there's a "Previous" button.

18. A new internet browser tab will open and may be blank. Let's join as the practitioner first and then rejoin as the patient.

19. Open a new tab in your browser and go to teams.microsoft.com. Select "**Use the web app instead**".

The screenshot shows the Microsoft Teams web app landing page. It features a large call-to-action button "Download the Teams desktop app and stay better connected." Below it are two options: "Get the Windows app" and "Use the web app instead", with the latter being highlighted by a red box.

20. Navigate to the Virtual Clinic app that you embedded in the "Lamna Healthcare – Redmond" Teams channel.

The screenshot shows the Microsoft Teams app interface. The top navigation bar includes a search bar and tabs for Activity, Chat, and Teams. The main area shows a "Teams" section with a "Your teams" list containing "Lamna Healthcare - Redmond". The "General" tab is selected in the ribbon. A red box highlights the "Virtual Clinic" tab, which is also selected. The right side of the screen displays a "Welcome to the team!" message and a note: "Here are some things to get going...".

21. On the Instant Virtual Appointment Dashboard, you will see that **Reed Flores** 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 lists an actor/patient named 'Reed Flores' with a status of 'Arrived'. A red box highlights this row. To the right of the card, there are buttons for 'Join Meeting' and 'Reed Flores - General ...'.

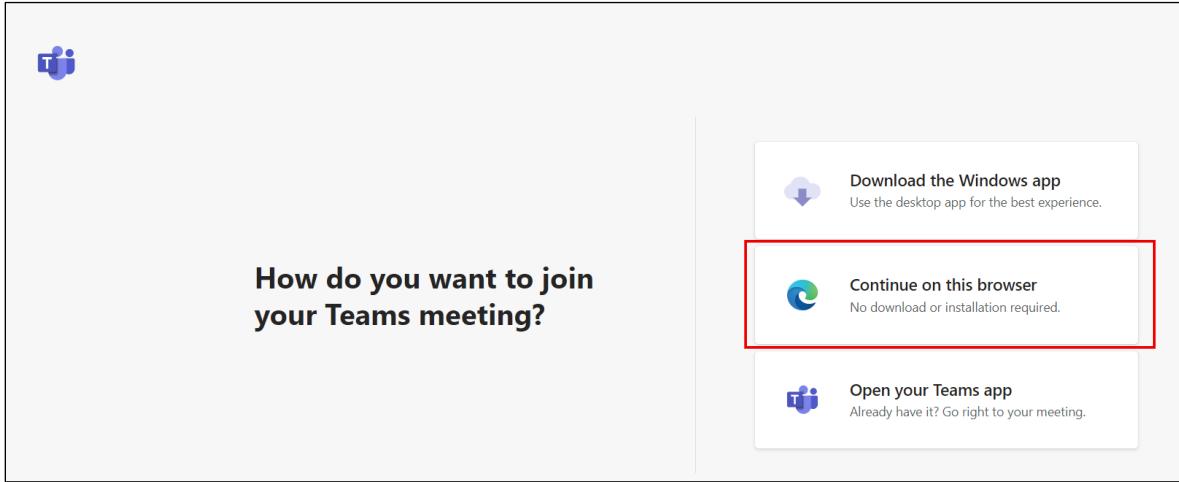
22. When Reed Flores' patient record opens, click **Join Meeting**.

The screenshot shows a Dynamics 365 record for 'Reed Flores - General Medicine'. The 'General' tab is selected. On the right, there's a 'Join Meeting' button, which is highlighted with a red box. The record displays various appointment details like start time, end time, and participant information.

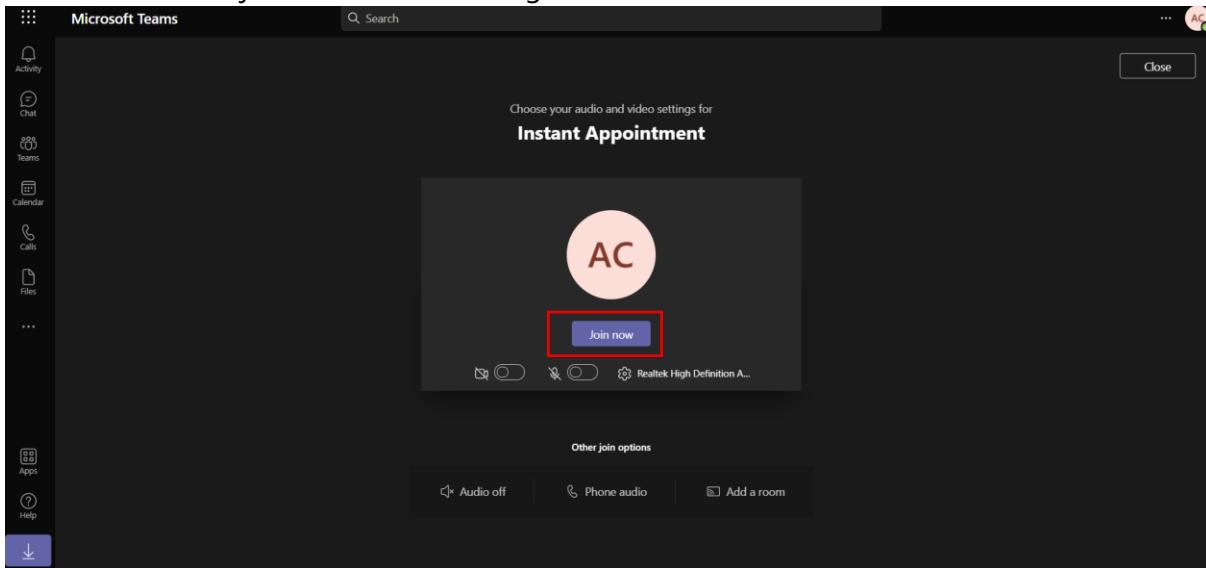
23. Click **Cancel** as we will not open the Microsoft Teams desktop app in this example.

A browser dialog box is shown, asking if 'https://teams.microsoft.com' should be opened. It contains two buttons: 'Open' and 'Cancel', with 'Cancel' being highlighted by a red box.

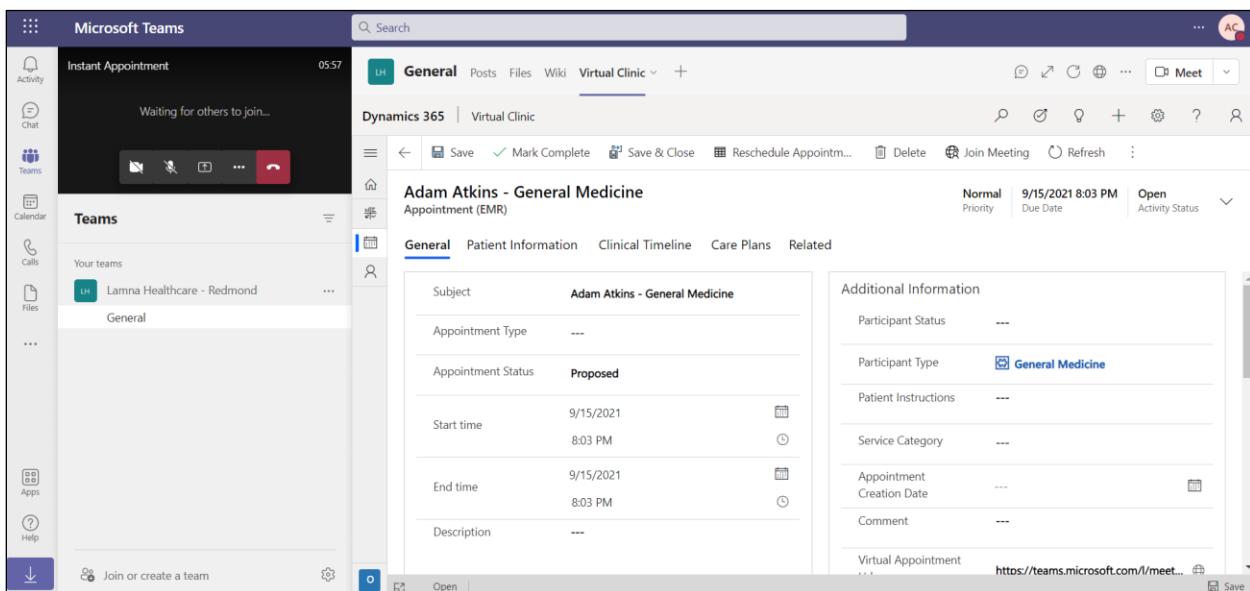
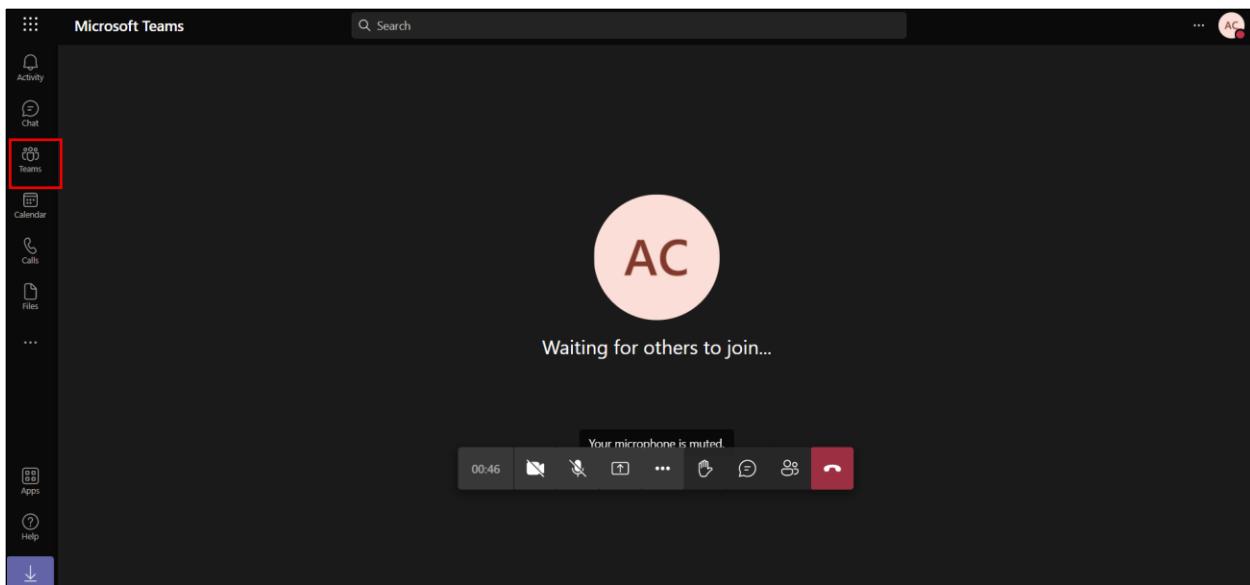
24. Click **Continue on this browser** to proceed with opening the virtual meeting.



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



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



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

If you are experiencing issues, please use the link below:
[Click here to join your appointment](https://teams.microsoft.com/l/meet...)

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

Summary

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

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

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

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