Getting Started Guide

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1 Getting Started

The prerequisite for downloading Health360 Core in App Source, is to have an existing Dynamics 365 online trial environment. In order to download this trial, start by clicking the “Try It” button and then following the steps in the following link:


Once the Dynamics 365 online trial is installed, you are now ready to get started with Health360 Core. Start by clicking the “Try” button and then following the steps in the following link:


2 Patient Overview

2.1 Patient Search

The Patient Search is a customized tool that queries the patient database. This tool searches the patient database using the patient’s name, date of birth, city, and/or phone number. These search fields can be easily configured and the user can add additional searchable fields or remove the existing attributes. All results are displayed in a list view and clicking on a patient name will navigate the user to patient record.

2.2 Creating Patients

The patient entity leverages the base Dynamics CRM Contact entity for demographic information, but has been specifically tailored to complement information from clinical systems with patient preferential, behavioral and social determinants of care. Patients can integrate from upstream systems or entered directly in CRM. Patients are identified within Dynamics CRM via their name, though healthcare identifiers have been added to allow for unique identification and integration with clinical systems.

2.3 Patient Information

The Patient record starts with General information. Name, phone, email, address, etc. The Details section contains additional descriptive information that can be used to identify the patient. This includes demographic characteristics and identification numbers. The MPI/Corporate ID is the single most important for the purposes of matching patients within Dynamics CRM to their related information in other systems.

All Patients have a Care Team which uses the out of the box Connections. The care team users are part of the clinical team (ie. Nutritionist, RN, etc.). Family consists of the patients’ relatives, primarily used to contact with information regarding the patient. Also on the patient form is the patient’s contact preferences along with the best time to be reached. The “About Me” section includes personal questions and the patient’s allergies, stressors, and transportation methods. Most of the personal fields are used to trigger the Visual Indicators (ie. Education, Transportation Issues, etc.). The patient has a section for activities and alerts. Activities are primarily used for proactive tasks like obtaining the patient’s medical history. Alerts are primarily used for reactive tasks like calling the patient about an abnormally high blood pressure. The user can always use the patient site map to navigate to any patient related entity, it is sectioned into four different areas of entities: Care Planning, Clinical, Preferential/Social, and Assessments.
2.4 Visual Indicators
Visual indicators are round icons located at the top of the patient form that allow the user to quickly get high level information about the patient. The list below includes the trial visual indicators and how they are displayed:

2.4.1 Advanced Directives
The Advance Directives icon is displayed if 1 or more Advance Directives records are created/exist for the Patient. If you delete all the existing Advance Directives records on a patient, this icon will not be displayed.

2.4.2 High Appointment No-Show Rate
The High Appointment No-Show rate icon is displayed if the Appointment no-show rate field has ‘High’ selected. If you hover over this icon, “High Appointment No-Show rate” will be displayed.

2.4.3 Low Income
The Low Income Icon is displayed if the Household Income field has ‘Less than $24,999’ selected. If you hover over this icon, “Less than $24,999” will be displayed.

2.4.4 No Education
The No Education icon is displayed if the Education field has ‘Some High School’ selected. If you hover over this icon, “No Education” will be displayed.

2.4.5 University Education
The University Graduation icon is displayed if the Education field has any of the following selected: Bachelor’s Degree, Master’s Degree or Doctoral Degree. If you hover over this icon, “University Education” will be displayed.

NOTE: Visual indicators are part of a limited trial. A complete visual indicator library is available upon purchase.

2.5 Medications
Health360 integrates with FHIR (Fast Healthcare Interoperability Resources) to display the patient’s current medications. The user will click on the “FHIR Medications” button on the Patient form, and a process will link the Patient’s MRN with the associated FHIR medications, and the results display in an iframe in CRM. The data includes the following details: medication names, dosages, clinical notes, medication status, prescription date, and if the medication has been taken.
3  Dashboards

3.1  Overview
Health360 dashboards are collections of charts and data lists showing various combinations of patients, care plan components and activities. The dashboards are fully configurable. For example, view selectors can be added to allow a dashboard chart to show all patients, only a user’s patients, or another team user’s patients. The number and size of charts or lists on a view can be easily modified.

Dashboards and corresponding components of charts and lists are fully interactive. Chart drilldowns can be performed to filter into desired data records. Data lists can be used to navigate to detailed data items. The list views within a dashboard are often reused from other locations within the system. Available columns, column widths and sorting are the same within both views, though the view can be copied if the dashboard view needs a summarized set of columns.

3.2  Engagement Center Dashboard
A system wide view with visibility for all Patient data and all Activity data. Notice the higher record counts for activities and patients. Icons in the upper right-hand corner of each chart allow the user to directly view the records used to generate the chart. Alternatively, the user can click on the portion of the chart for drill-down, and select any field on the entity. These charts provide visibility to the number of patients in the diagnostic programs and onboarding status. The alert charts provide visibility to open alerts generated each day for patients. The alerts are categorized by levels, with level five being the most severe. Only alerts that have not been resolved are displayed on the charts.

4  Configurations

4.1  Installing Managed Solution
Once the managed solution has been installed, the administrative user will need to publish the Health360 Theme. In order to do so, the user will need to navigate to CRM Themes, by clicking on Settings > Customizations > Themes. Then click on the Health360 Theme and click on the Publish button.

4.2  Uninstalling Managed Solution
Before uninstalling the Health360 managed solution. The administrative user will need to delete the Health360 Theme record. In order to do so, the user will need to navigate to CRM Themes, by clicking on Settings > Customizations > Themes. Then select the Health360 Theme and click delete. After the theme has been deleted, select the CRM Default Theme and click on the Publish Theme button in the navigation ribbon. Once these steps have been completed, the managed solution can be uninstalled by navigating to Settings > Solutions selecting the solution to be deleted, and then clicking on the delete button.

5  Contact Tribridge
To contact our subject matter experts please provide the information below using the link provided. If you need immediate assistance feel free to contact us at 1 (888) 495-4749.

http://www.tribridge.com/about/contact