

Provider Privileging Documentation - Organization Configuration & Use

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Overview

Introducing the Provider Privileging Application for Salesforce Health Cloud.

We are excited to announce the launch of our new Provider Privileging Application, now available on the Salesforce AppExchange! This innovative application is designed to extend the capabilities of Salesforce Health Cloud, specifically tailored to support the provider privileging process for hospital systems.

Key Features:

- **Facility-Specific Privileges:** Easily specify and manage the privileges offered at each facility.
- **Documentation Management:** Define and track the required documentation for practitioners to apply for specific privileges at specific facilities.
- **Streamlined Workflows and Approvals:** Utilize built-in workflows and approval processes to efficiently manage the privileging process. Collect privileging requests, ensure all necessary documentation is received, and route requests through a streamlined approval process.
- **Seamless Integration with Health Cloud:** Connects seamlessly with Salesforce Health Cloud Provider Relationship management capabilities, adding privileging to the Provider 360 for a comprehensive view of your practitioners.
- **Enhance your hospital system's privileging process** with our Provider Privileging Application and experience a more efficient, organized, and integrated approach to managing practitioner privileges.

Discover more and get started today on the Salesforce AppExchange!

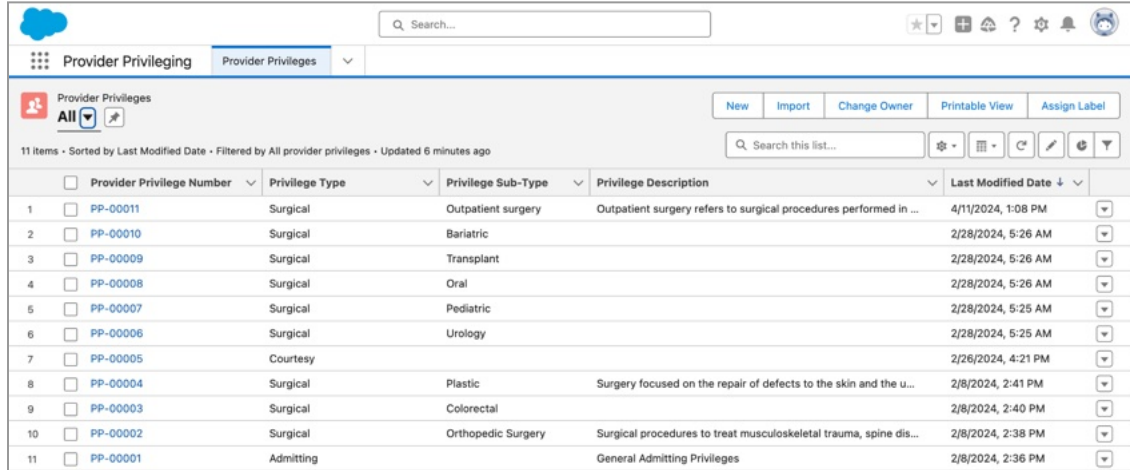
Specify the Privileging Rules for Your Organization

Setting up your organization's rules for accepting provider privileging requests requires 4 foundational set up steps, followed by Facility-specific steps. Each of these steps can be completed from within the newly installed Provider Privileging app.

Foundational Set Up Steps

1. Ensure there is a **Healthcare Facility** record for every facility in your organization that intends to use this provider privilege process. *These records may already be in place depending on your existing use of Health Cloud.*
2. Create a **Provider Privilege** record for each unique privilege you intend to accept privilege requests for using this app. Enter the privilege if it is offered at any of your facilities,

even if it is not available at all facilities. Only enter a privilege once here, even if a privilege is to be offered at multiple facilities with different document requirements at each one.



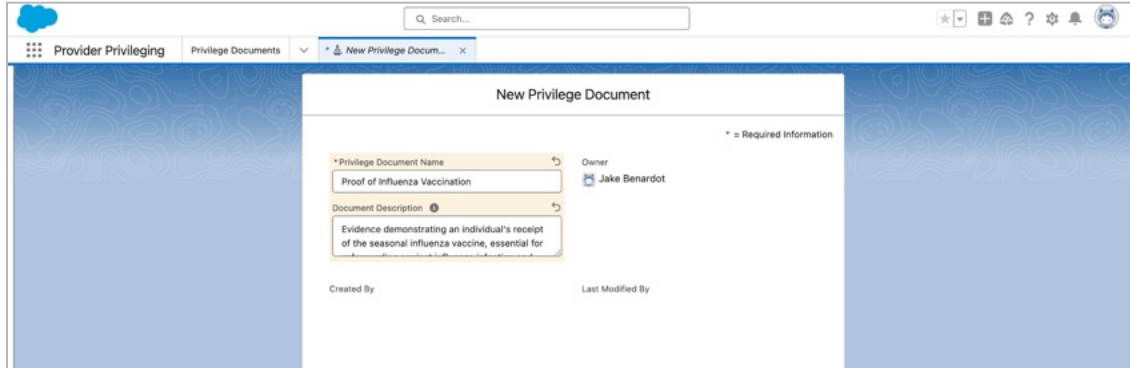
The screenshot shows the 'Provider Privileges' section of a software interface. It includes a search bar, a list of actions (New, Import, Change Owner, Printable View, Assign Label), and a table of 11 privileges. The table columns are: Provider Privilege Number, Privilege Type, Privilege Sub-Type, Privilege Description, and Last Modified Date. The privileges listed are: PP-00011 (Surgical, Outpatient surgery), PP-00010 (Surgical, Bariatric), PP-00009 (Surgical, Transplant), PP-00008 (Surgical, Oral), PP-00007 (Surgical, Pediatric), PP-00006 (Surgical, Urology), PP-00005 (Courtesy), PP-00004 (Surgical, Plastic), PP-00003 (Surgical, Colorectal), PP-00002 (Surgical, Orthopedic Surgery), and PP-00001 (Admitting, General Admitting Privileges).

	Provider Privilege Number	Privilege Type	Privilege Sub-Type	Privilege Description	Last Modified Date
1	PP-00011	Surgical	Outpatient surgery	Outpatient surgery refers to surgical procedures performed in ...	4/11/2024, 1:08 PM
2	PP-00010	Surgical	Bariatric		2/28/2024, 5:26 AM
3	PP-00009	Surgical	Transplant		2/28/2024, 5:26 AM
4	PP-00008	Surgical	Oral		2/28/2024, 5:26 AM
5	PP-00007	Surgical	Pediatric		2/28/2024, 5:25 AM
6	PP-00006	Surgical	Urology		2/28/2024, 5:25 AM
7	PP-00005	Courtesy			2/26/2024, 4:21 PM
8	PP-00004	Surgical	Plastic	Surgery focused on the repair of defects to the skin and the u...	2/8/2024, 2:41 PM
9	PP-00003	Surgical	Colorectal		2/8/2024, 2:40 PM
10	PP-00002	Surgical	Orthopedic Surgery	Surgical procedures to treat musculoskeletal trauma, spine dis...	2/8/2024, 2:38 PM
11	PP-00001	Admitting		General Admitting Privileges	2/8/2024, 2:36 PM

Privileges require a Privilege Type. Default values for the Type field are Admitting, Courtesy, and Surgical. These values can be managed in the Global Value Set (Setup > Picklist Value Sets) Privilege Type.

Privilege also includes a Sub-Type text field, which is optional. This field should only be left blank once per Privilege Type maximum.

3. Create a Privilege Document record for each unique document that is required for one or more provider privilege requests. Only enter a document once if the same document is required for multiple privilege requests. Creating a privilege document only requires a name and an optional description.

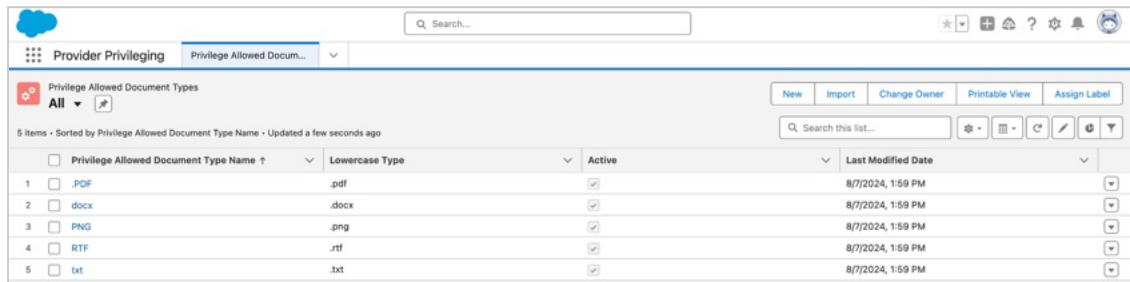


The screenshot shows the 'New Privilege Document' form. It includes a search bar, a list of actions (New, Import, Change Owner, Printable View, Assign Label), and a form with the following fields: Privilege Document Name (Proof of Influenza Vaccination), Owner (Jake Benardot), Document Description (Evidence demonstrating an individual's receipt of the seasonal influenza vaccine, essential for...), Created By, and Last Modified By. A note indicates that fields with an asterisk (*) are required information.

4. Create a record in Privilege Allowed Document Type for each document type you will allow to be submitted when a provider or your representative uploads their required documents. Entry here is case insensitive and can include or exclude the ".". So "PDF", ".Pdf", and ".pdf" will all be treated the same - only one of those needs to be entered to allow a PDF file to be uploaded.

You can indicate if the file extension is Active or Inactive. Only Active file extensions will be

allowed to be uploaded in the Screen Flows that are included in this package.



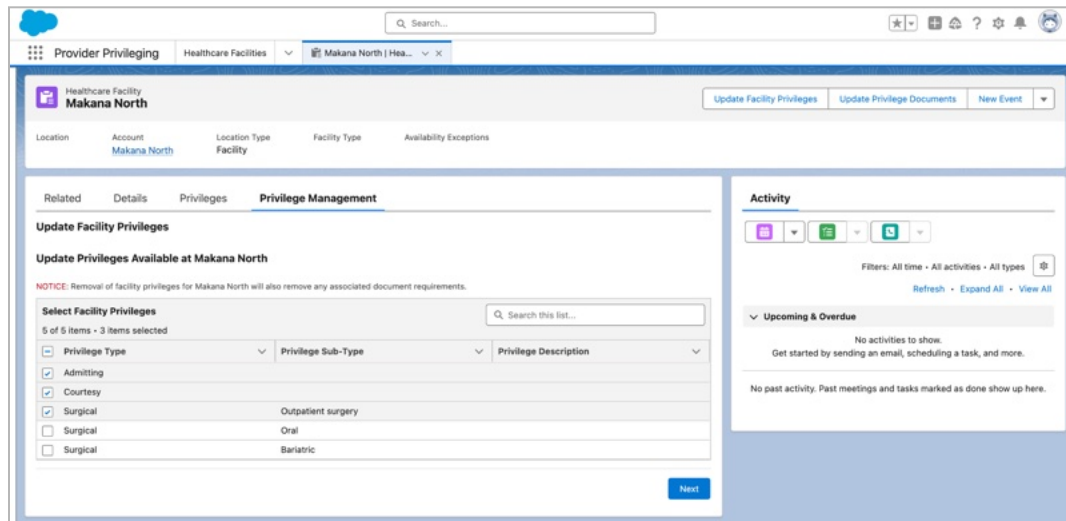
	Privilege Allowed Document Type Name	Lowercase Type	Active	Last Modified Date
1	.PDF	.pdf	☒	8/7/2024, 1:59 PM
2	.docx	.docx	☒	8/7/2024, 1:59 PM
3	.PNG	.png	☒	8/7/2024, 1:59 PM
4	.RTF	.rtf	☒	8/7/2024, 1:59 PM
5	.txt	.txt	☒	8/7/2024, 1:59 PM

Facility-Specific Set Up Steps

Navigate to a **Healthcare Facility** record within the Provider Privileging app. Here, the **Privilege Management** tab, along with the **Update Facility Privileges** and **Update Privilege Documents** buttons provide workflows to specify:

1. Which privileges can be requested at this facility, and
2. Which documents are required for a privilege request at this facility.

Select all Privileges that should be available for requests at this facility.



Update Facility Privileges

Update Privileges Available at Makana North

NOTICE: Removal of facility privileges for Makana North will also remove any associated document requirements.

Select Facility Privileges

5 of 5 items - 3 items selected

Privilege Type	Privilege Sub-Type	Privilege Description
☒ Admitting		
☒ Courtesy		
☒ Surgical	Outpatient surgery	
☐ Surgical	Oral	
☐ Surgical	Bariatric	

Next

Confirm the privileges that are added and/or removed from the facility.

The screenshot shows the 'Update Facility Privileges' interface for 'Makana North'. The top navigation bar includes a search bar and tabs for 'Provider Privileging', 'Healthcare Facilities', and 'Makana North | Hea...'. The main content area is divided into two sections: 'Update Facility Privileges' and 'Activity'.

Update Facility Privileges

Review Changes
Please review the privileges added and removed for Makana North.

Added Facility Privileges
3 of 3 items • 0 items selected

Privilege Type	Privilege Sub-Type	Privilege Description
Admitting		
Courtesy		
Surgical	Outpatient surgery	

Removed Facility Privileges
0 of 0 items • 0 items selected

Privilege Type	Privilege Sub-Type	Privilege Description
No items to display.		

Buttons: Previous, Confirm

Activity

Filters: All time • All activities • All types

Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.

Receive the confirmation of the number of privileges added and removed. Then determine if you would like to specify required documents for a facility privilege.

The screenshot shows the 'Update Facility Privileges' interface for 'Makana North'. The top navigation bar includes a search bar and tabs for 'Provider Privileging', 'Healthcare Facilities', and 'Makana North | Hea...'. The main content area is divided into two sections: 'Update Facility Privileges' and 'Activity'.

Update Facility Privileges

Update of Privileges for Makana North Complete
Privileges Added: 3
Privileges Removed: 0

Update Document Requirements ☒ Yes

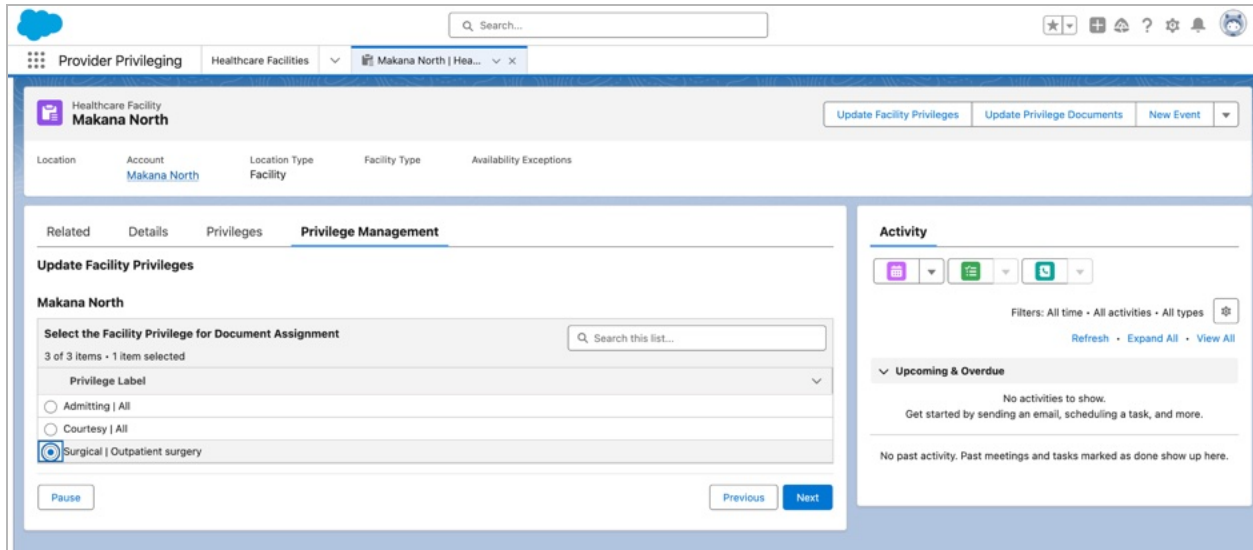
Next

Activity

Filters: All time • All activities • All types

Upcoming & Overdue
No activities to show.
Get started by sending an email, scheduling a task, and more.
No past activity. Past meetings and tasks marked as done show up here.

If “Yes” was selected in the previous step, then select the facility privilege to specify required documents for.



Provider Privileging Healthcare Facilities Makana North | Hea...

Healthcare Facility **Makana North**

Update Facility Privileges Update Privilege Documents New Event

Location Account **Makana North** Location Type Facility Facility Type Availability Exceptions

Related Details Privileges **Privilege Management**

Update Facility Privileges

Makana North

Select the Facility Privilege for Document Assignment

3 of 3 items • 1 item selected

Search this list...

Privilege Label

☐ Admitting | All

☐ Courtesy | All

☒ Surgical | Outpatient surgery

Pause Previous Next

Activity

Filters: All time • All activities • All types

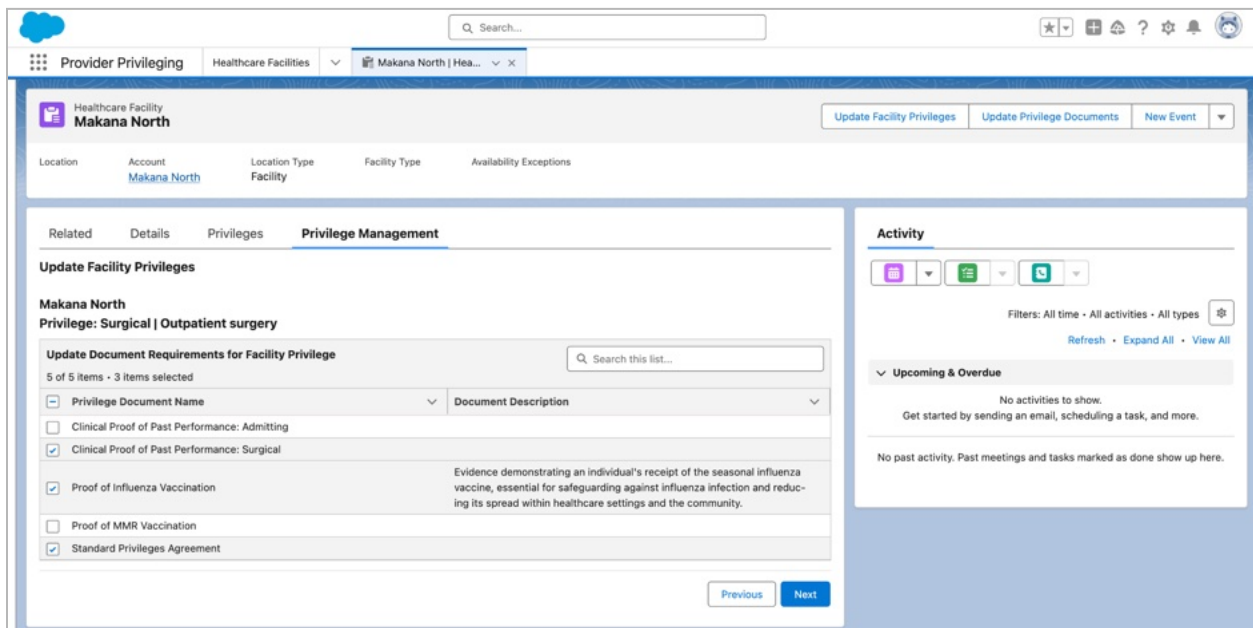
Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Select or adjust the documents that are required for the specified privilege and facility. IE. These are the documents that are required in order to be considered for the specified privilege at the specified facility.



Provider Privileging Healthcare Facilities Makana North | Hea...

Healthcare Facility **Makana North**

Update Facility Privileges Update Privilege Documents New Event

Location Account **Makana North** Location Type Facility Facility Type Availability Exceptions

Related Details Privileges **Privilege Management**

Update Facility Privileges

Makana North

Privilege: Surgical | Outpatient surgery

Update Document Requirements for Facility Privilege

5 of 5 items • 3 items selected

Search this list...

Privilege Document Name	Document Description
☐ Clinical Proof of Past Performance: Admitting	
☒ Clinical Proof of Past Performance: Surgical	
☒ Proof of Influenza Vaccination	Evidence demonstrating an individual's receipt of the seasonal influenza vaccine, essential for safeguarding against influenza infection and reducing its spread within healthcare settings and the community.
☐ Proof of MMR Vaccination	
☒ Standard Privileges Agreement	

Previous Next

Activity

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Review the changes made. Select the Confirm button once correct.

Provider Privileging | Healthcare Facilities | Makana North | Healthcare Facility

[Update Facility Privileges](#) | [Update Privilege Documents](#) | [New Event](#)

Location: Makana North | Account: Makana North | Location Type: Facility | Facility Type: | Availability Exceptions:

Related | **Details** | **Privileges** | **Privilege Management**

Update Facility Privileges

Makana North
Privilege: Surgical | Outpatient surgery

Added Document Requirements for Facility Privilege
 3 of 3 Items - 0 Items selected

Privilege Document Name	Document Description
Clinical Proof of Past Performance: Surgical	
Proof of Influenza Vaccination	Evidence demonstrating an individual's receipt of the seasonal influenza vaccine, essential for safeguarding against influenza infection and reducing its spread within healthcare settings and the community.
Standard Privileges Agreement	

Removed Document Requirements for Facility Privilege
 0 of 0 Items - 0 Items selected

Privilege Document Name	Document Description
No items to display.	

[Previous](#) [Confirm](#)

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
 Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Receive the confirmation of the number of document requirements added and removed.

Provider Privileging | Healthcare Facilities | Makana North | Healthcare Facility

[Update Facility Privileges](#) | [Update Privilege Documents](#) | [New Event](#)

Location: Makana North | Account: Makana North | Location Type: Facility | Facility Type: | Availability Exceptions:

Related | **Details** | **Privileges** | **Privilege Management**

Update Facility Privileges

Update Complete
 Makana North
 Surgical | Outpatient surgery

Documents Added: 3
 Documents Removed: 0

[Pause](#) [Previous](#) [Finish](#)

Activity

Filters: All time • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

Upcoming & Overdue

No activities to show.
 Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Continue to add or adjust documents required for additional privileges at the facility by selecting the Update Privilege Documents button at the top of the Healthcare Facility record.

Provider Privileging

Healthcare Facilities

Makana North | Hea...

Healthcare Facility

Makana North

Update Facility Privileges

Update Privilege Documents

New Event

Location

Account

Location Type

Facility Type

Availability Exceptions

Makana North

Facility

Related

Details

Privileges

Privilege Management

Update Facility Privileges

Update Privileges Available at Makana North

NOTICE: Removal of facility privileges for Makana North will also remove any associated document requirements.

Select Facility Privileges

5 of 5 items • 3 items selected

Privilege Type	Privilege Sub-Type	Privilege Description
☒ Admitting		
☒ Courtesy		
☒ Surgical	Outpatient surgery	
☐ Surgical	Oral	
☐ Surgical	Bariatric	

Next

Activity

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No activities to show.

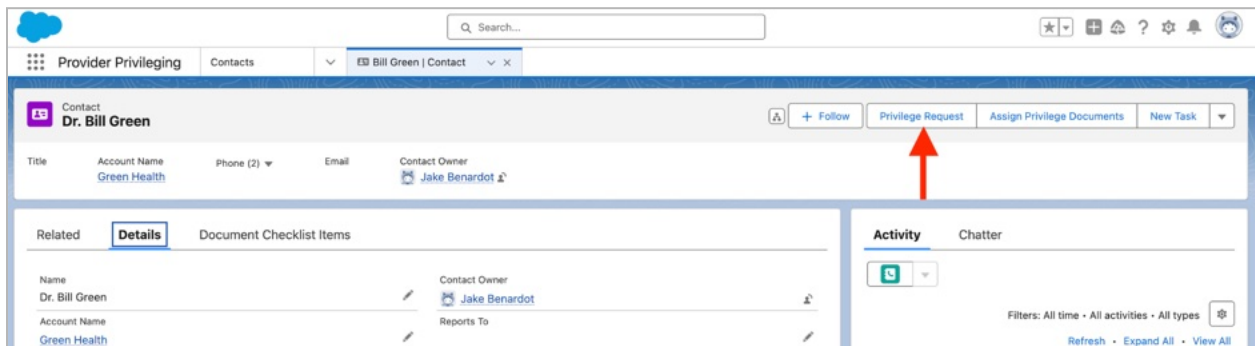
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

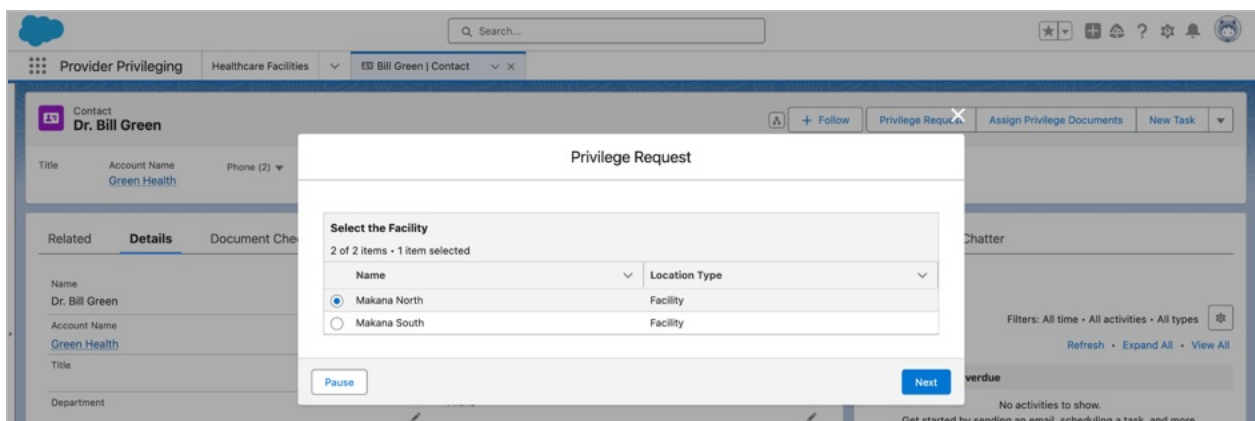
Creating and Reviewing Provider Privilege Requests

Creating the Request

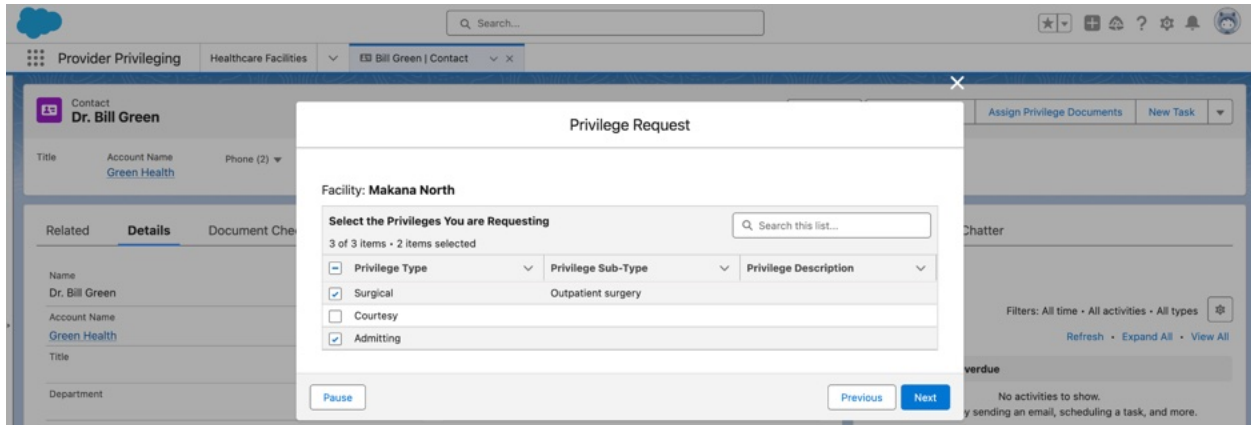
Navigate to a Contact record within the Provider Privileging app. Then select the **Privilege Request** button at the top of the record page.



If multiple facilities are set up with available privileges, then the workflow will first ask which facility the request is for. Each request must be for 1 specific facility. Multiple requests can be submitted in situations where a practitioner needs access to multiple facilities.



Select one or more privileges to request for the practitioner at the selected facility.



Privilege Request

Facility: **Makana North**

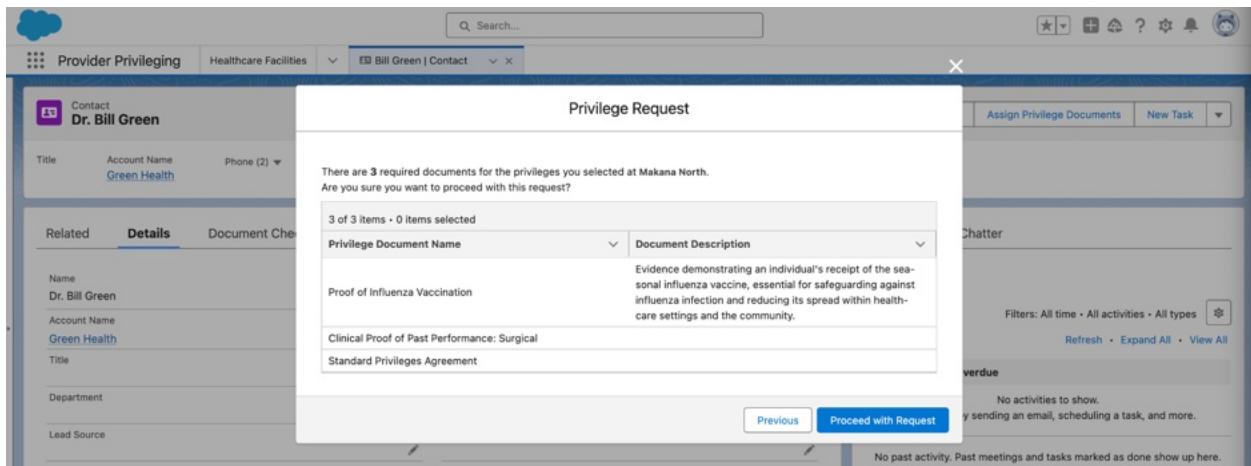
Select the Privileges You are Requesting

3 of 3 items • 2 items selected

Privilege Type	Privilege Sub-Type	Privilege Description
☒ Surgical	Outpatient surgery	
☐ Courtesy		
☒ Admitting		

[Pause](#) [Previous](#) [Next](#)

Review the required documents. When ready, select Proceed with Request.



Privilege Request

There are 3 required documents for the privileges you selected at Makana North. Are you sure you want to proceed with this request?

3 of 3 items • 0 items selected

Privilege Document Name	Document Description
Proof of Influenza Vaccination	Evidence demonstrating an individual's receipt of the seasonal influenza vaccine, essential for safeguarding against influenza infection and reducing its spread within health-care settings and the community.
Clinical Proof of Past Performance: Surgical	
Standard Privileges Agreement	

[Previous](#) [Proceed with Request](#)

Review the Privilege Request summary. Select **Yes** for **Upload Documents Now** if you wish to begin uploading required documents for the request. Note: You can also upload a document later via the **Assign Privilege Documents** button on the Contact record.

Privilege Request

Request Number: 00001094
Facility: Makana North

Requested Provider Privileges
2 of 2 items - 0 items selected

Privilege Type	Privilege Sub-Type	Privilege Description
Admitting		
Surgical	Outpatient surgery	

Documents Required for this Request
3 of 3 items - 0 items selected

Privilege Document Name	Document Description
Proof of Influenza Vaccination	Evidence demonstrating an individual's receipt of the seasonal influenza vaccine, essential for safeguarding against influenza infection and reducing its spread within health-care settings and the community.
Clinical Proof of Past Performance: Surgical	
Standard Privileges Agreement	

Upload Documents Now ☒ Yes

Pause Previous Next

If you selected Yes in the previous step, select the document you wish to upload.

Privilege Request

Select a Document to Upload
All of the following documents must be received in order to review your privileges request.

Required Documents
3 of 3 items - 0 items selected

Name	Status	Received Document ID
☐ Proof of Influenza Vaccination	New	
☐ Clinical Proof of Past Performance: Surgical	New	
☐ Standard Privileges Agreement	New	

Previous Next

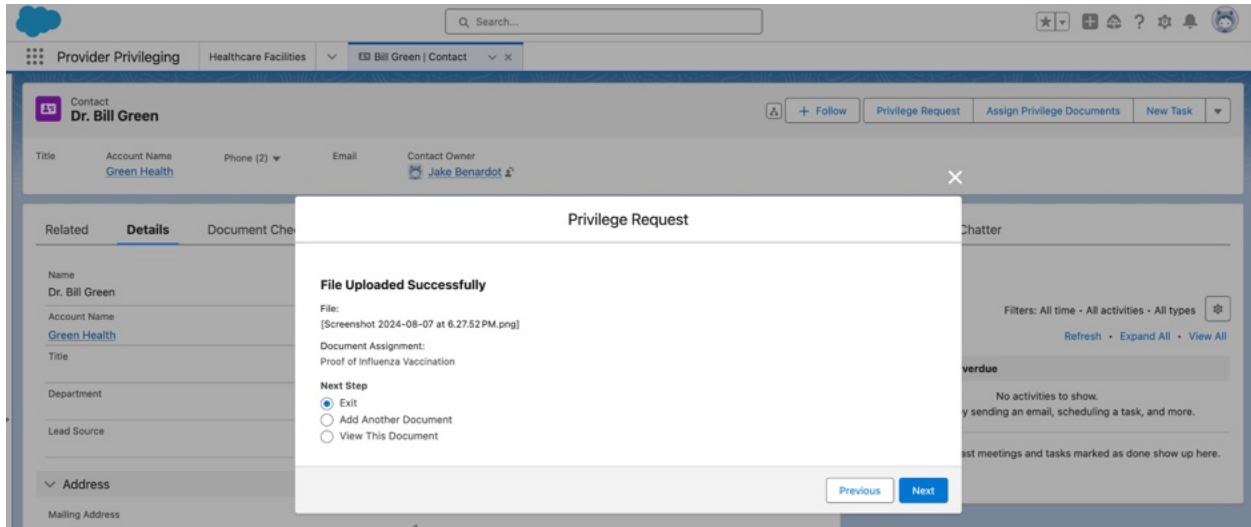
Upload the file for the selected document. Note that only file extensions created and marked as Active in the set up steps can be uploaded.

Provider Privileging: Organization Configuration & Use

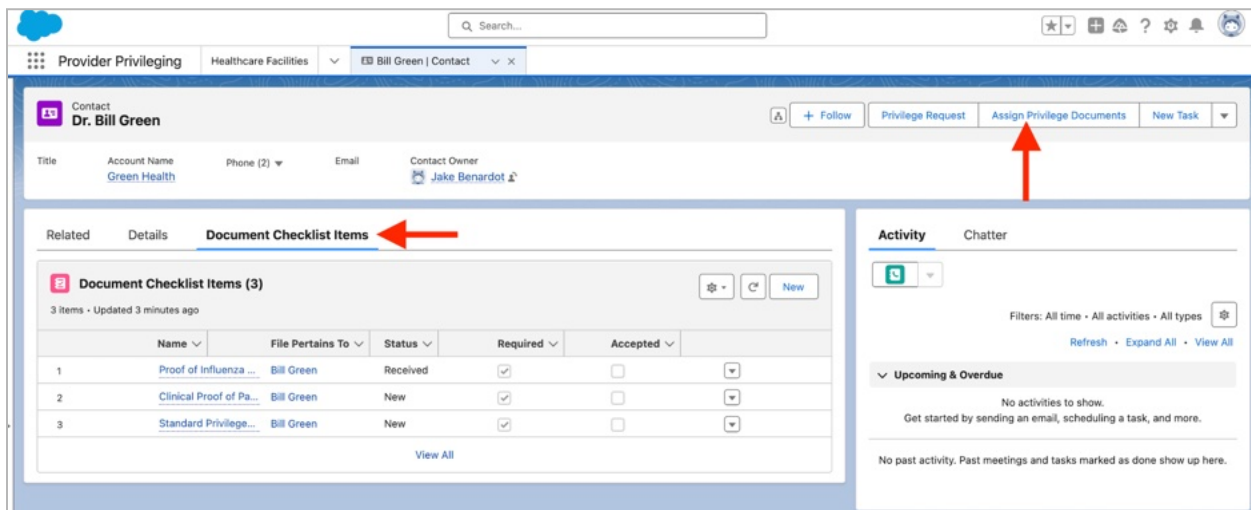
The screenshot shows the 'Provider Privileging' interface for 'Dr. Bill Green'. A 'Privilege Request' modal is open, prompting the user to upload 'Proof of Influenza Vaccination'. The modal includes a description: 'Evidence demonstrating an individual's receipt of the seasonal influenza vaccine, essential for safeguarding against influenza infection and reducing its spread within healthcare settings and the community.' Below the description, there is an 'Upload Files' button and a 'Drop files' area. The background interface shows the contact details for Dr. Bill Green, including his title, account name, phone number, email, and contact owner (Jake Benardot).

This screenshot shows the 'Upload Files' modal, which is a sub-step of the 'Privilege Request' process. It displays a file named 'Screenshot 2024-08-07 at 6.27.52 PM.png' with a size of 577 KB. A progress bar indicates the upload status, and a green checkmark confirms the file is uploaded. Below the progress bar, it says '1 of 1 file uploaded'. The modal also includes a 'Done' button. The background interface remains the same, showing the contact details for Dr. Bill Green.

Determine if you would like to exit the workflow, upload another required document, or view the document that was just uploaded.



The Document Checklist Items tab provides all required documents for the practitioner across all of their privilege requests. If a practitioner has multiple privilege requests that require overlapping documents, then the document requirement is only displayed once and only needs to be uploaded once to support all privilege requests. The Status indicates which documents have been received. Additional documents can be uploaded via the Assign Privilege Documents button.



The Privilege Request workflow shown above will automatically create the following records for the practitioner **if they do not already exist**.

1. A Healthcare Provider record for the practitioner (Contact).
2. A Healthcare Practitioner Facility record that associates the Practitioner with the Facility where privileges were requested. Note: This record is **not** Active at this time since the request has not yet been approved.

Cases are created for the practitioner as follows:

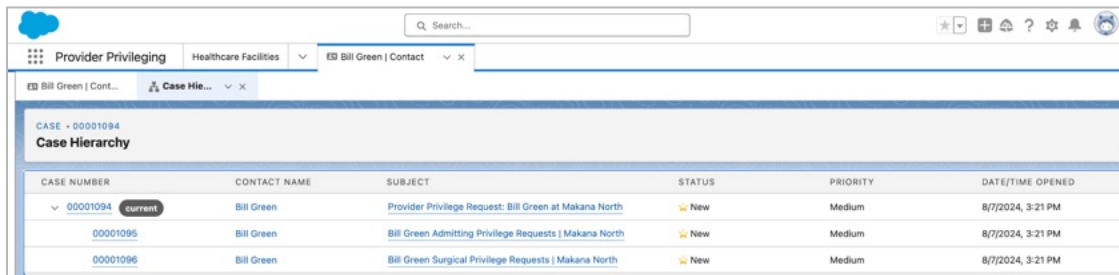
1. A single parent case of Record Type **Provider Privileging** per privilege request workflow completed.
2. One child case of Record Type **Provider Privilege Type Request** per Privilege Type requested in a completed workflow.

One **Practitioner Facility Privilege** record is created for each facility privilege being requested.

For example, if 2 surgical privileges and 1 admitting privilege are requested in a workflow for a practitioner at a facility, then:

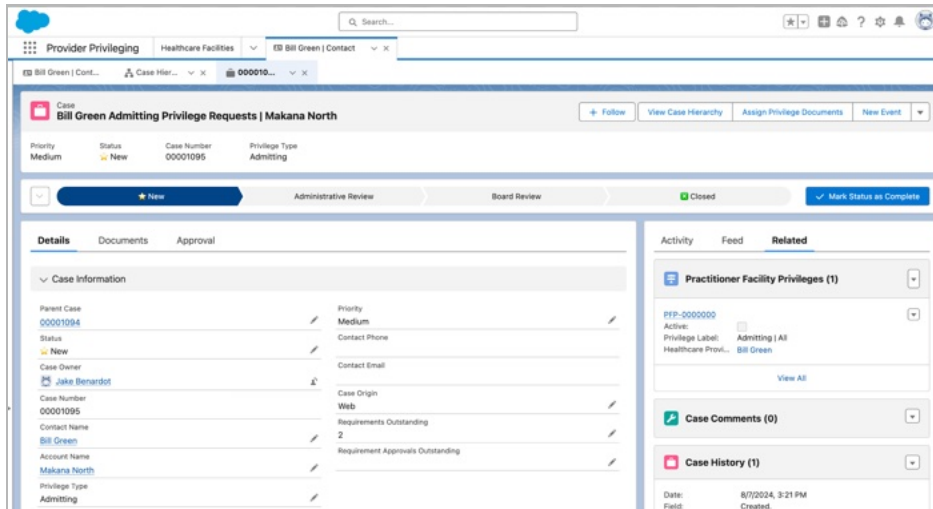
- 1 **Healthcare Provider** record will be created for the practitioner (Contact) if one does not exist already.
- 1 **Healthcare Practitioner Facility** record will be created that joins the practitioner (Contact) to the Healthcare Facility record if one does not exist already.
- 3 **Practitioner Facility Privilege** records will be created: 1 for each requested facility privilege.
- 3 **Cases** will be created: 1 parent case, 1 child case for the two surgical privileges, 1 child case for the one admitting privilege.

Case Hierarchy example



CASE NUMBER	CONTACT NAME	SUBJECT	STATUS	PRIORITY	DATE/TIME OPENED
00001094	Bill Green	Provider Privilege Request: Bill Green at Makana North	New	Medium	8/7/2024, 3:21 PM
00001095	Bill Green	Bill Green Admitting Privilege Requests Makana North	New	Medium	8/7/2024, 3:21 PM
00001096	Bill Green	Bill Green Surgical Privilege Requests Makana North	New	Medium	8/7/2024, 3:21 PM

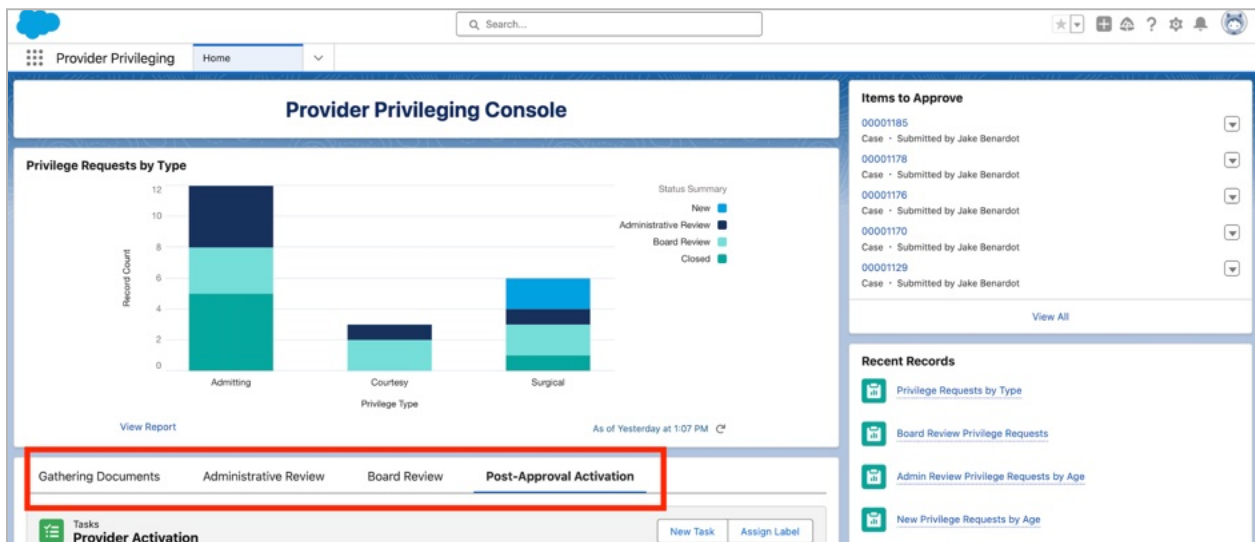
Privilege Type Case Example, with corresponding Practitioner Facility Privileges



Review and Approval Process

There are 4 key states of a privilege request. These steps are represented by the 4 tabs on the Provider Privileging app Home screen.

1. **Gathering Documents:** The time period starting with the initial submission of the privilege request and ending once all required documents have a status of “Received”.
2. **Administrative Review:** The time period starting when all documents have been “Received” and ending when all documents have been marked as “Accepted”. This is an opportunity for the organization to validate that the uploaded document contains all relevant and necessary information before the request package is presented to the review board.
3. **Board Review:** The time period starting when all documents have been marked as “Accepted” and ending when an Approval Request has been Approved or Rejected.
4. **Post-Approval Activation:** The time period after the review board has made a determination. If that determination was to accept the privilege request, then this will create activation steps to be reviewed and acted upon.



The Provider Privileging package includes automation that will automatically move a request.

- The Status field of Document Checklist Items controls when the case is moved to Administrative Review This occurs when all Status values for the Contact are “Received”
- The Accepted field of Document Checklist Items controls when the case is moved to Board Review. This occurs when all values for the Contact are checked (true).

A provider may have multiple requests occurring in parallel, and those requests may have different required documents. However, privilege requests will not proceed through the process until **all** documents needed by the practitioner across all their active requests meet the criteria to proceed.

The screenshot shows the 'Provider Privileging' interface for 'Dr. Bill Green'. The 'Document Checklist Items' tab is active, displaying a table with 3 items. The table has columns: Name, File Pertains, Status, Required, and Accepted. Red arrows point to the 'Status' and 'Accepted' columns. The 'Status' column shows 'Received' for the first item and 'New' for the others. The 'Accepted' column shows checkboxes, with the first one checked.

Name	File Pertains ...	Status	Required	Accepted
1 Proof of Influenza Vaccination	Bill Green	Received	☒	☒
2 Clinical Proof of Past Performance: Surgical	Bill Green	New	☒	☐
3 Standard Privileges Agreement	Bill Green	New	☒	☐

The Case records are used to control progress through the request process.

- The parent case (Record type: Provider Privileging) provides high-level status visibility. These statuses update automatically. No manual intervention is necessary.
 - New: Indicates documents are still being collected for the privilege request(s).
 - Working: Indicates the requests are in either Administrative or Board Review.
 - Closed: Indicates the requests have been approved or rejected.
- The child case(s) (Record type: Provider Privilege Type Request) are used to manage the detailed status for each privilege type requested at a facility. The statuses of New, Administrative Review, Board Review, and Closed align to the process states described above.

Administrative Review

Administrative Review automatically begins once all Document Checklist Items for a practitioner have a status of “Received”.

The Administrative Review tab of the Provider Privileging app Home page will list the parent case(s). This can be used as the starting point for Administrative Reviewers to know what work is ready for them. Select the Case number to proceed with administrative review for that privilege request.

The screenshot shows the 'Provider Privileging' app Home page. The 'Administrative Review' tab is active. It features a chart titled 'Admin Review Privilege Requests by Age' and a table of cases. A red arrow points to the 'Cases' section header.

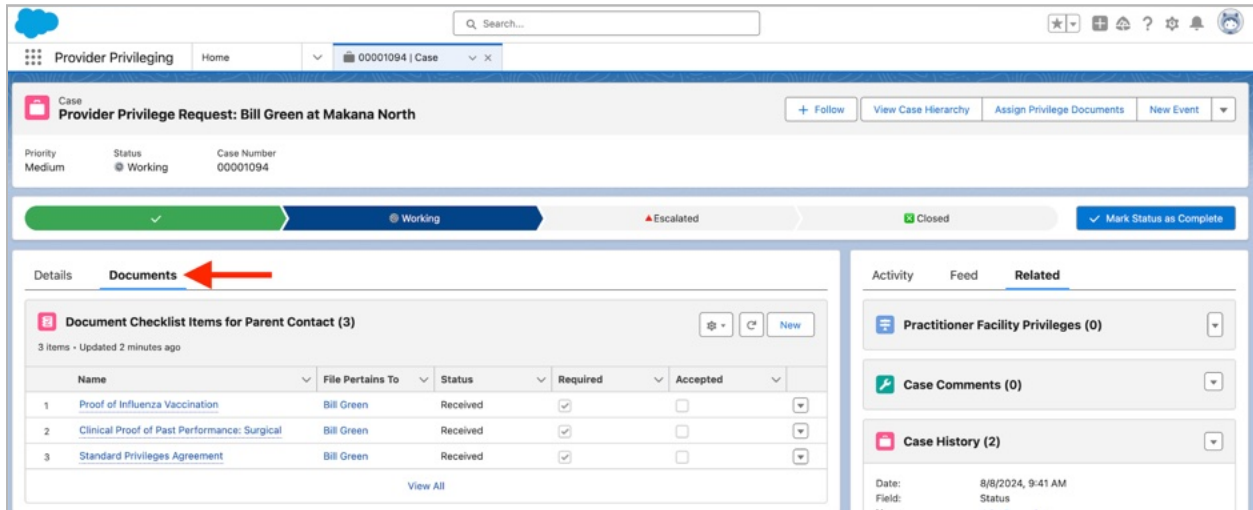
Case Number	Practitioner	Subject	Status	Priority	Date/Time	Owner
00001094	Bill Green	Provider Privilege Request: Bill Green at Mak...	Working	Medium	8/7/2024, 3:21 P...	JBena

The parent case view provides an Administrative Reviewer visibility into what Privilege Types were requested.

The screenshot shows the 'Case' view for '00001094 | Case'. The 'Details' tab is active. It features a table titled 'Privilege Types Requested (2)' and a sidebar with 'Related' items. A red arrow points to the 'Privilege Types Requested (2)' section header.

Case Num...	Privilege ...	Subject	Priority	Status	Owner Na...
00001095	Admitting	Bill Green Admitting Privilege Requests...	Medium	Administrative Review	Privilege Admi...
00001096	Surgical	Bill Green Surgical Privilege Requests [...]	Medium	Administrative Review	Privilege Admi...

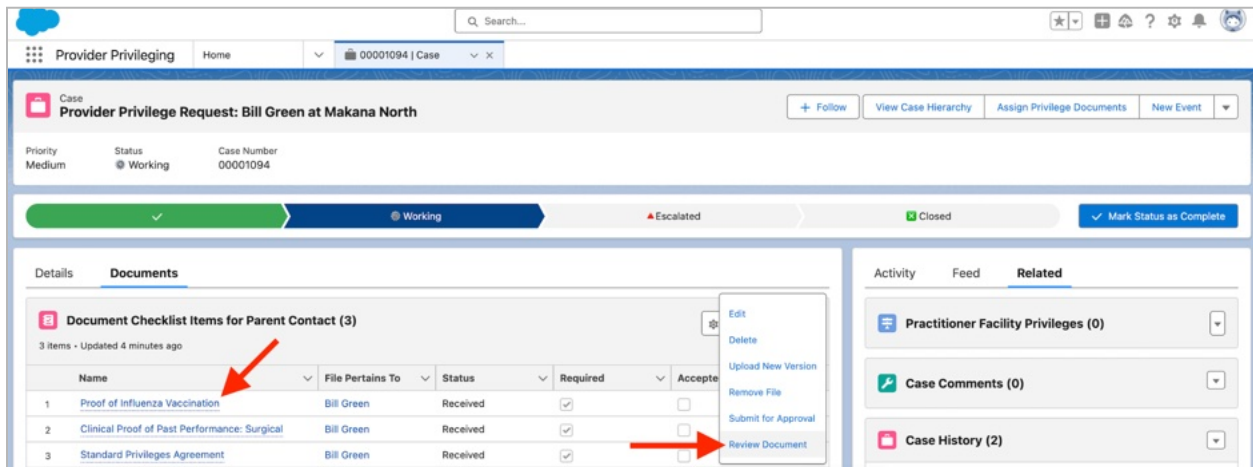
Selecting the Documents tab on the parent case provides a view into all required documents for the corresponding request(s). When Administrative Review begins each document will be Received and no document will be Accepted.



The screenshot shows the 'Provider Privileging' interface. At the top, there's a search bar and navigation tabs. The main header displays the case title 'Provider Privilege Request: Bill Green at Makana North' along with buttons for '+ Follow', 'View Case Hierarchy', 'Assign Privilege Documents', and 'New Event'. Below this, the case details show 'Priority: Medium', 'Status: Working', and 'Case Number: 00001094'. A progress bar indicates the current status is 'Working'. The 'Documents' tab is selected, showing a 'Document Checklist Items for Parent Contact (3)' section. A table lists three items: 'Proof of Influenza Vaccination', 'Clinical Proof of Past Performance: Surgical', and 'Standard Privileges Agreement'. Each item is marked as 'Received' and has a 'Required' checkbox checked. The 'Accepted' column has unchecked checkboxes. A red arrow points to the 'Documents' tab. On the right, there are sections for 'Practitioner Facility Privileges (0)', 'Case Comments (0)', and 'Case History (2)'.

Name	File Pertains To	Status	Required	Accepted
1 Proof of Influenza Vaccination	Bill Green	Received	☒	☐
2 Clinical Proof of Past Performance: Surgical	Bill Green	Received	☒	☐
3 Standard Privileges Agreement	Bill Green	Received	☒	☐

Review the document by selecting the Document Name, or by using menu item “Review Document”



This screenshot is similar to the previous one but shows a context menu open for the first document, 'Proof of Influenza Vaccination'. The menu options include 'Edit', 'Delete', 'Upload New Version', 'Remove File', 'Submit for Approval', and 'Review Document'. A red arrow points to the document name in the table, and another red arrow points to the 'Review Document' option in the menu.

Name	File Pertains To	Status	Required	Accepted
1 Proof of Influenza Vaccination	Bill Green	Received	☒	☐
2 Clinical Proof of Past Performance: Surgical	Bill Green	Received	☒	☐
3 Standard Privileges Agreement	Bill Green	Received	☒	☐

Provider Privileging: Organization Configuration & Use

If the document meets the requirements, then update the document Status to Accepted via the Edit menu item.

Case: Provider Privilege Request: Bill Green at Makana North

Priority: Medium | Status: Working | Case Number: 00001094

Progress: Working (Active) | Escalated | Closed | Mark Status as Complete

Documents

Document Checklist Items for Parent Contact (3)

Name	File Pertains To	Status	Required	Accepted
1 Proof of Influenza Vaccination	Bill Green	Received	☒	☐
2 Clinical Proof of Past Performance: Surgical	Bill Green	Received	☒	☐
3 Standard Privileges Agreement	Bill Green	Received	☒	☐

View All

Activity | Feed | Related

- Practitioner Facility Privileges (0)
- Case Comments (0)
- Case History (2)

Date: 8/8/2024, 9:41 AM
Field: Status

Case: Provider Privilege Request: Bill Green

Priority: Medium | Status: Working | Case Number: 00001094

Progress: Working (Active) | Escalated | Closed | Mark Status as Complete

Documents

Document Checklist Items for Parent Contact (3)

Name	File Pertains To	Status	Required	Accepted
1 Proof of Influenza Vaccination	Bill Green	Received	☒	☐
2 Clinical Proof of Past Performance: Surgical	Bill Green	Received	☒	☐
3 Standard Privileges Agreement	Bill Green	Received	☒	☐

View All

Activity | Feed | Related

- Practitioner Facility Privileges (0)
- Case Comments (0)
- Case History (2)

Date: 8/8/2024, 9:41 AM
Status: Jake Benardot
New
Working
Created: 8/7/2024, 3:21 PM
Created: Jake Benardot

View All

Edit Proof of Influenza Vaccination

* = Required Information

Information

* Name: Proof of Influenza Vaccination

Owner Name: Jake Benardot

Document Type: Search Document Types...

* Status: Accepted

* Original Parent Record: Bill Green

File Pertains To: Bill Green

Instructions:

Privilege Document: Proof of Influenza Vaccination

Required: ☒

Cancel Save & New Save

If the document does not meet the requirements, then another version of the document can be added using the “Upload New Version” menu option.

The screenshot displays the Provider Privileging interface for a case titled "Provider Privilege Request: Bill Green at Makana North". The case number is 00001094. The status is "Working". The interface shows a progress bar with stages: Working, Escalated, and Closed. The "Documents" tab is active, showing a list of document checklist items for parent contact. A red arrow points to the "Upload New Version" option in the context menu for the "Standard Privileges Agreement" document.

Name	File Pertains To	Status	Required	Accept
1 Proof of Influenza Vaccination	Bill Green	Accepted	☒	☒
2 Clinical Proof of Past Performance: Surgical	Bill Green	Received	☒	☐
3 Standard Privileges Agreement	Bill Green	Received	☒	☐

Context menu options for the "Standard Privileges Agreement" document:

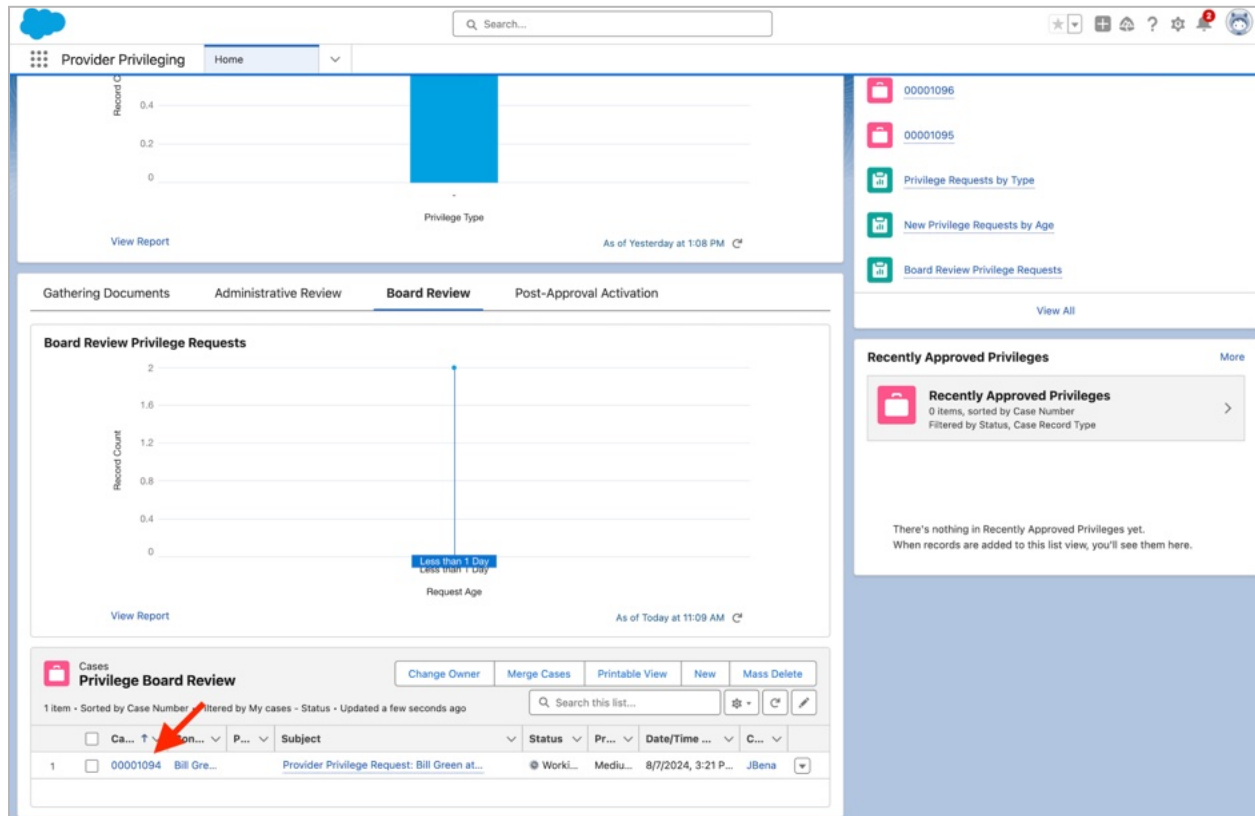
- Edit
- Delete
- Upload New Version
- Remove File
- Submit for Approval
- Review Document

Repeat these steps until all Document Checklist Items are in an Accepted status.

Board Review

Board Review automatically begins once all Document Checklist Items for a practitioner have a status of “Accepted”.

The Board Review tab of the Provider Privileging app Home page will list the parent case(s). This can be used as the starting point for Board Reviewers to know what work is ready for them. Select the Case number to proceed with board review for that privilege request.



The parent case view provides a Board Reviewer visibility into what Privilege Types were requested. The Board Reviewer will navigate into each Privilege Type Request to review and approve or reject at the request level.

Case
Provider Privilege Request: Bill Green at Makana North

Priority: Medium | Status: Working | Case Number: 00001094

Progress: Working (Active), Escalated, Closed

Details | Documents

Privilege Types Requested (2)
2 items - Updated 2 minutes ago

	Case Num...	Privilege ...	Subject	Priority	Status	Owner Na...
1	00001095	Admitting	Bill Green Admitting Privilege Requests Ma...	Medium	Board Review	Privilege Board...
2	00001096	Surgical	Bill Green Surgical Privilege Requests Maka...	Medium	Board Review	Privilege Board...

[View All](#)

Activity | **Feed** | **Related**

- Practitioner Facility Privileges (0)
- Case Comments (0)
- Case History (2)

The Board Reviewer can review the following items from within a child case for a specific type of privilege requested:

1. The specific privilege type and sub-types included in the request.

Case
Bill Green Admitting Privilege Requests | Makana North

Priority: Medium | Status: Board Review | Case Number: 00001095 | Privilege Type: Admitting

Progress: Board Review (Active), Closed

Details | Documents | Approval

Case Information

Parent Case	00001094	Priority	Medium
Status	Board Review	Contact Phone	
Case Owner		Contact Email	
Privilege Board Review		Case Policy	

Activity | **Feed** | **Related**

Practitioner Facility Privileges (1)

PPF-0000000

Active: ☐ Admitting | All

Healthcare Provi...: Bill Green

[View All](#)

- The required document list and the documents uploaded for each one.

Case: Bill Green Admitting Privilege Requests | Makana North

Priority: Medium, Status: Board Review, Case Number: 00001095, Privilege Type: Admitting

Guidance for Success: This record is **locked** during Board Review.

Details Documents Approval

Document Checklist Items for Parent Contact (3)

Name	File Pertains To	Status	Required	Accept
1 Proof of Influenza Vaccination	Bill Green	Accepted	✓	✓
2 Clinical Proof of Past Performance: Surgical	Bill Green	Accepted	✓	✓
3 Standard Privileges Agreement	Bill Green	Accepted	✓	✓

View All

Activity Feed Related

Practitioner Facility Privileges (1)

PFP-0000000

Active: ☐ Admitting | All Healthcare Provi... Bill Green

View All

Case Comments (0)

- The ability to Approve or Reject the request

Case: Bill Green Admitting Privilege Requests | Makana North

Priority: Medium, Status: Board Review, Case Number: 00001095, Privilege Type: Admitting

Guidance for Success: This record is **locked** during Board Review.

Details Documents Approval

Approval History (2)

Step Name	Date	Status	Assigned To	Actual Approver	Comments
1 Privilege Board Review	8/8/2024, 11:06 A...	Pending	Privilege Board Review	Privilege Board Review	
2 Approval Request Sub...	8/8/2024, 11:06 A...	Submitted	Jake Benardot	Jake Benardot	Automated approval pr...

View All

Activity Feed Related

Practitioner Facility Privileges (1)

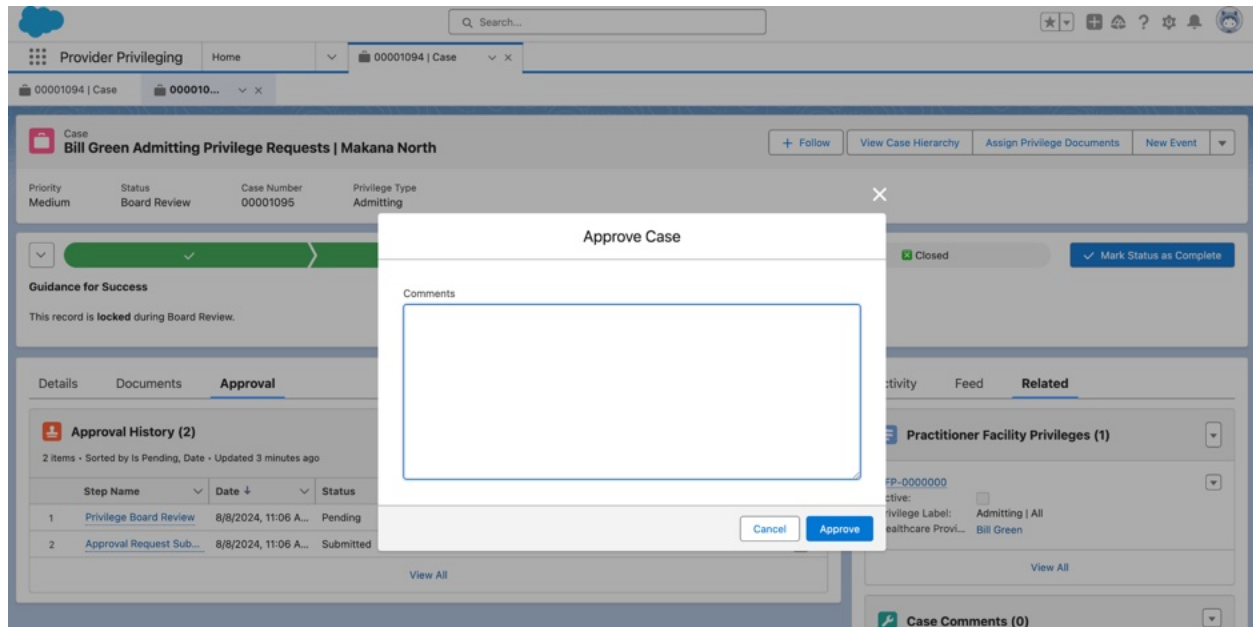
PFP-0000000

Active: ☐ Admitting | All Healthcare Provi... Bill Green

View All

Case Comments (0)

Selecting the Approve or Reject button will display an optional comments field for approval/rejection reason.



Updates will be reflected in the Approval History and Case History. Additionally, the related Practitioner Facility Privileges records will now be marked as Active. Approving or Rejecting closes the Case.

Case: Bill Green Admitting Privilege Requests | Makana North

Priority: Medium | Status: Closed - Approved | Case Number: 00001095 | Privilege Type: Admitting

Navigation: New | Administrative Review | Board Review | Closed | Mark Status as Complete

Approval

Approval History (2)
2 items • Sorted by Is Pending, Date • Updated a few seconds ago

Step Name	Date	Status	Assigned To	Actual App...	Comments
1. Privilege Board Review	8/8/2024, 11:27 AM	Approved	Privilege Board Review	Jake Benardot	Looks good - approved.
2. Approval Request Submit...	8/8/2024, 11:06 A...	Submitted	Jake Benardot	Jake Benardot	Automated approval proc...

[View All](#)

Related

Practitioner Facility Privileges (1)

PFP-0000000

Active: ☒
 Privilege Label: Admitting | All
 Healthcare Provi... Bill Green

[View All](#)

Case Comments (0)

Case History (3+)

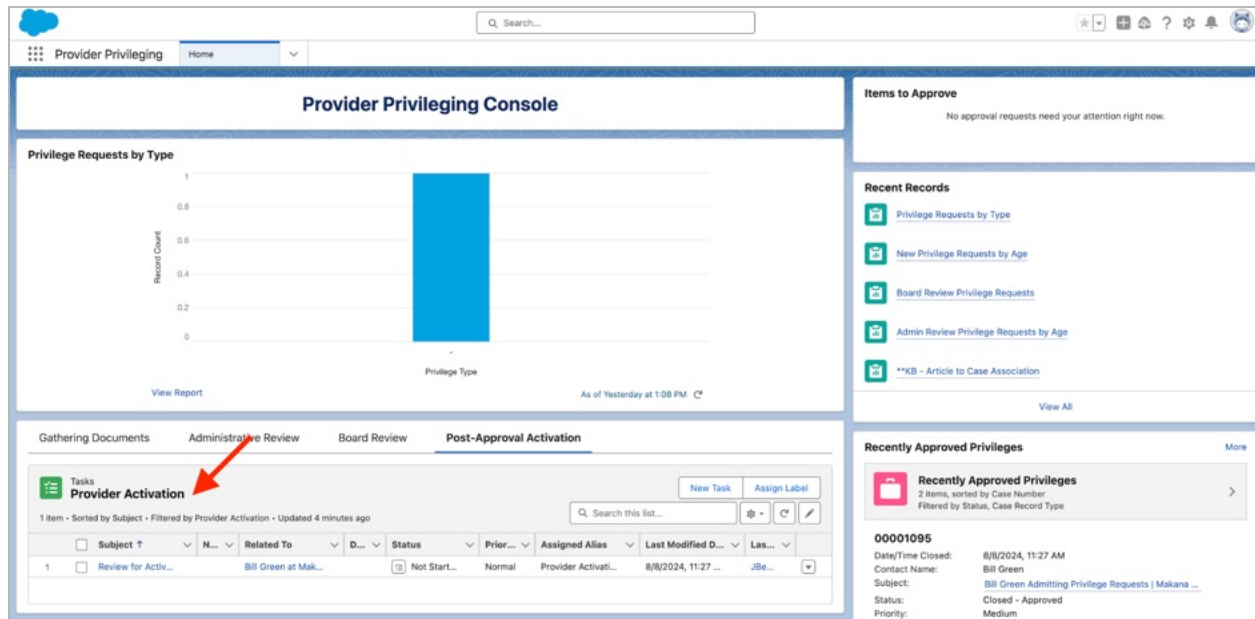
Date: 8/8/2024, 11:27 AM
 Field: Status
 User: Jake Benardot
 Original Value: Board Review
 New Value: Closed - Approved

Date: 8/8/2024, 11:06 AM
 Field: Record locked
 User: Jake Benardot
 Original Value:
 New Value:

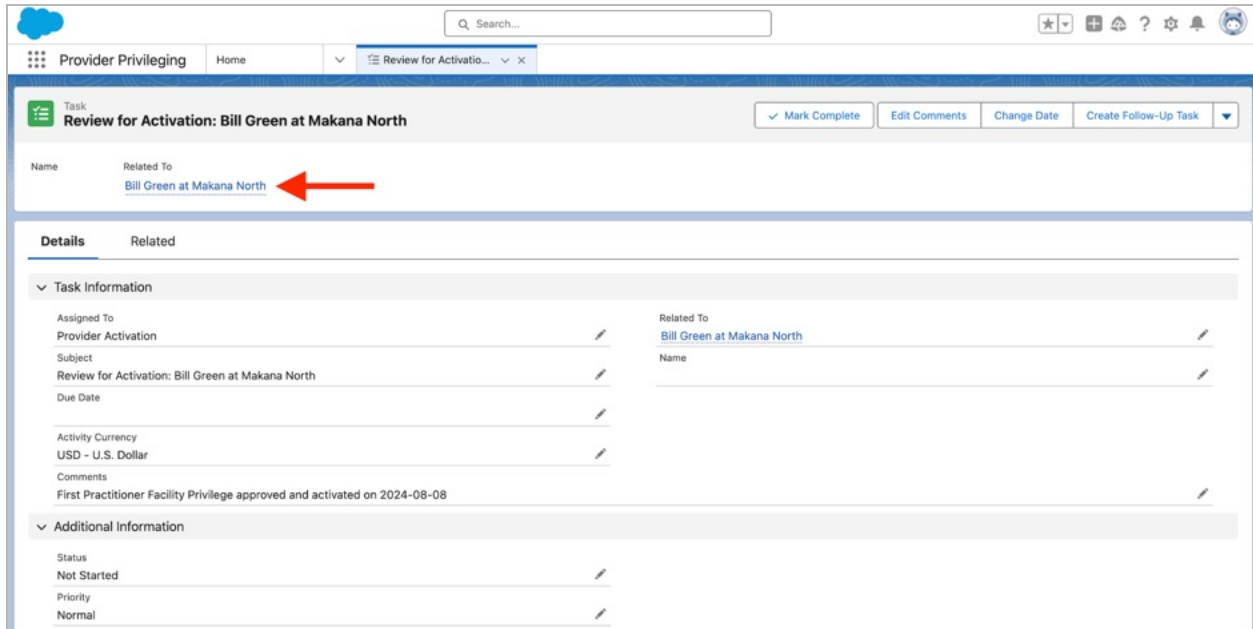
Post-Approval Activation

Post-Approval Activation automatically begins once a parent privilege request case is closed, as long as at least one child case for that parent case has been approved.

The Post-Approval Activation tab of the Provider Privileging app Home page will display any Provider Activation tasks that were automatically created. This can be used as the starting point for those responsible for activating provider privileges after the board has accepted them. Select the task subject to proceed with the activation task.



The task identifies a related Healthcare Practitioner Facility record. This record may have been created as part of the initial privilege request workflow. If so, it was not activated at that time. This task is a means to manually review this record and activate that record if appropriate. You can also specify an Initial Start Date.



Task
Review for Activation: Bill Green at Makana North

Buttons: Mark Complete, Edit Comments, Change Date, Create Follow-Up Task

Name: [Blank]
Related To: [Bill Green at Makana North](#) (indicated by a red arrow)

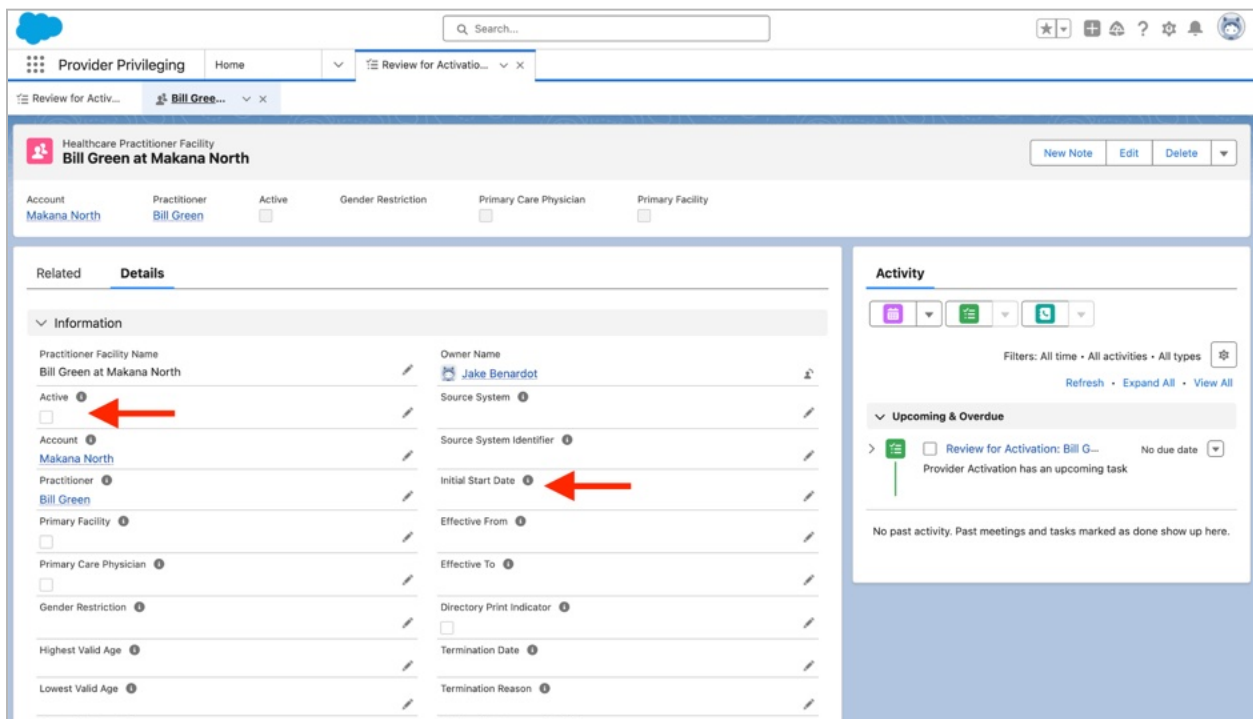
Details | Related

Task Information

Assigned To	Provider Activation	Related To	Bill Green at Makana North
Subject	Review for Activation: Bill Green at Makana North	Name	[Blank]
Due Date	[Blank]		
Activity Currency	USD - U.S. Dollar		
Comments	First Practitioner Facility Privilege approved and activated on 2024-08-08		

Additional Information

Status	Not Started
Priority	Normal



Healthcare Practitioner Facility
Bill Green at Makana North

Buttons: New Note, Edit, Delete

Account: Makana North | Practitioner: Bill Green | Active: ☐ | Gender Restriction: ☐ | Primary Care Physician: ☐ | Primary Facility: ☐

Related | **Details**

Information

Practitioner Facility Name	Bill Green at Makana North	Owner Name	Jake Benardot
Active	☐ (indicated by a red arrow)	Source System	[Blank]
Account	Makana North	Source System Identifier	[Blank]
Practitioner	Bill Green	Initial Start Date	[Blank] (indicated by a red arrow)
Primary Facility	[Blank]	Effective From	[Blank]
Primary Care Physician	[Blank]	Effective To	[Blank]
Gender Restriction	[Blank]	Directory Print Indicator	☐
Highest Valid Age	[Blank]	Termination Date	[Blank]
Lowest Valid Age	[Blank]	Termination Reason	[Blank]

Activity

Filters: All time • All activities • All types

Upcoming & Overdue

- ☐ Review for Activation: Bill G... No due date
- Provider Activation has an upcoming task

No past activity. Past meetings and tasks marked as done show up here.

Reference: [Salesforce Health Cloud Developer Guide - HealthcarePractitionerFacility](#)

Your organization may determine it appropriate to add additional automation for Approved and/or Rejected privilege applications. This may include letters, welcome packets, data delivery to facility badging systems, and more. These items are not currently included in this Provider Privileging package.

Reports

Report	Description	Included on Provider Privileging App Home page
Privilege Document Reqs by Facility	Identifies what documents are required for each Privilege Type/Sub-Type combination by Facility.	No
Admin Review Privilege Requests by Age	Identifies privilege requests in Administrative Review, grouped by the age of the request.	Yes
Board Review Privilege Requests	Identifies privilege requests in Board Review, grouped by the age of the request.	Yes
New Privilege Requests by Age	Identifies privilege requests in New status, grouped by the age of the request.	Yes
Privilege Requests by Type	Identifies the count of Privilege Requests that have been received across all time, regardless of status, grouped by Privilege Type.	Yes