

Provider Privileging Documentation: Set Up

Last updated September 30, 2024

Overview	2
Prerequisites	2
Manual Set Up Steps	3
Case Status Values and Support Processes	3
Queues	7
Approval Process	8
Create a Path	16
Add Field to Document Checklist Items Page Layout	16
Status Values for Document Checklist Items	16
Ensure App Homepage Listviews are Setup	17
Set Up the View of Contacts	20
Activate Case Type Lightning Page	21
Additional Technical and Set Up Information	22
Submitting Privilege Requests via Alternative Options	22
Using Person Account Instead of Contact	22
Starting a Privileging Request for a Practitioner Lead Record	24
Starting a Privileging Request for a Practitioner that is not yet known to your organization	24
Adding the Privilege Request to a portal so it can be completed by the practitioner or their representative	24
Data Model	25

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!

Prerequisites

The provider privileging application requires that the user have a **Health Cloud** license with the following permission sets assigned.

- Document Checklists
 - Health Cloud Provider Relationship Management
-

Manual Set Up Steps

The following items cannot be included in a managed package and therefore must be set up manually in the destination Salesforce Org by a System Administrator. This setup should occur after installing the managed package, prior to use.

Case Status Values and Support Processes

Step 1

Create and Activate Values

Board Review

Administrative Review

Closed - Approved

Closed - Declined

Do **NOT** assign these values to any Support Process yet.

The screenshot shows the Salesforce Setup interface for 'Case Status' values. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Case Page Layouts, Case Close Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Slack Record Layouts, Hierarchy Columns, Triggers, Flow Triggers, and Validation Rules. The main content area is titled 'Case Status' and includes instructions on adding picklist values. A text box contains the following values: Board Review, Administrative Review, Closed - Approved, and Closed - Declined. Below this, there is a section for adding new values to the picklist for a particular Support Process, with checkboxes for Support Processes, Provider Privileging, Standard Support Process, and Support Process Provider Privileging Type Review. A table shows the description for each: Case Process for Provider Privileging and Support process used by all case record types. At the bottom, there are Save and Cancel buttons.

Step 2

Ensure that **Closed - Approved** and **Closed - Declined** are set as Closed values.

Step 3

Reorder Values to be:

1. New
2. Working
3. Escalated
4. Administrative Review
5. Board Review
6. Closed
7. Closed - Approved
8. Closed - Declined

Your org may have additional values. This is fine.

The screenshot shows the Salesforce Setup interface for configuring the 'Case Status' picklist. The left sidebar contains a navigation menu with options like 'Details', 'Fields & Relationships', 'Case Page Layouts', 'Case Close Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', 'Search Layouts', 'List View Button Layout', 'Slack Record Layouts', 'Hierarchy Columns', 'Triggers', 'Flow Triggers', and 'Validation Rules'. The main content area is titled 'Picklist Edit Case Status' and includes a 'Help for this Page' link. Below the title, there is a instruction: 'Select a value and use the arrows to change its placement in the list. Choose a value as the default value for this picklist.' The 'Sort Picklist Values' section displays a list of values: 'New', 'Working', 'Escalated', 'Administrative Review', 'Board Review', 'Waiting on Customer', 'Reply Received', 'Closed', 'Closed - Approved', and 'Closed - Declined'. Each value has a small icon to its left. To the right of the list are arrows for 'Top', 'Up', 'Down', and 'Bottom'. Below the list, the 'Default Value' is set to 'New'. There is a checkbox labeled 'Display values alphabetically, not in the order entered' which is currently unchecked. At the bottom of the section are 'Save' and 'Cancel' buttons.

Case Statuses should look like this once steps 1-3 are completed. It is fine if additional statuses are also included.

Case Status Picklist Values					
New Reorder Replace Printable View Chart Colors					
Action	Values	API Name	Closed	Default	Chart Colors
Edit Deactivate	New	New	☐	☒	Assigned dynamically
Edit Del Deactivate	Working	Working	☐	☐	Assigned dynamically
Edit Del Deactivate	Escalated	Escalated	☐	☐	Assigned dynamically
Edit Del Deactivate	Administrative Review	Administrative Review	☐	☐	Assigned dynamically
Edit Del Deactivate	Board Review	Board Review	☐	☐	Assigned dynamically
Edit Del Deactivate	Closed	Closed	☒	☐	Assigned dynamically
Edit Del Deactivate	Closed - Approved	Closed - Approved	☒	☐	Assigned dynamically
Edit Del Deactivate	Closed - Declined	Closed - Declined	☒	☐	Assigned dynamically

Step 4

Update the **Provider Privileging Support Process** to include Selected Values

New

Working

Escalated

Closed (Closed)

With a Default value of **New**

Feature Settings
Health Cloud
FHIR R4 Support Settings
Service
Support Processes
Support Settings

Didn't find what you're looking for?
Try using Global Search.

SETUP
Support Processes

Support Process
Provider Privileging

Select a value from the Available Values list and add it to the Selected Values list to be included in the support process. Note that removing a status from the support process will not remove the value from any records already containing the status.

Case Status

Support Process
Provider Privileging

Namespace Prefix
DrPrivileges

Description
Case Process for Provider Privileging

Available Values

Administrative Review
Board Review
Waiting on Customer
Reply Received
Closed - Approved (Closed)
Closed - Declined (Closed)

Add
Remove

Selected Values

New
Working
Escalated
Closed (Closed)

Default
New

Save Cancel

Page 5 of 26

Step 5

Update the **Support Process Provider Privileging Type Review** to include Selected Values
New

Administrative Review

Board Review

Closed - Approved (Closed)

Closed - Declined (Closed)

With a Default value of **New**

support

Feature Settings

Health Cloud

FHIR R4 Support Settings

Service

Support Processes

Support Settings

Didn't find what you're looking for? Try using Global Search.

SETUP Support Processes

Support Process

Support Process Provider Privileging Type Review

Select a value from the Available Values list and add it to the Selected Values list to be included in the support process. Note that removing a status from the support process will not remove the value from any records already containing the status.

Case Status

Support Process	Support Process Provider Privileging Type Review
Namespace Prefix	DrPrivileges
Description	
Available Values	Selected Values
☒ Working ☐ Escalated ☐ Waiting on Customer Reply Received ☒ Closed (Closed)	☒ New Administrative Review Board Review Closed - Approved (Closed) Closed - Declined (Closed)

Add

Remove

Default:

Save Cancel

Queues

Create three queues. The Queue Names you create must be an exact match to the items below.

Queues

Queues allow groups of users to manage a shared workload more effectively. A queue is a location where records can be routed to await processing by a group member who accepts them for processing or they are transferred to another queue. You can specify the set of objects that are supported by each queue, as well as the set of users who can process records in the queue.

View: All ▾ [Edit](#) | [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O

Action	Label ↑	Queue Name	Queue Email	Supported Objects
Edit Del	Privilege Administrative Review	Privilege_Administrative_Review		Case
Edit Del	Privilege Board Review	Privilege_Board_Review		Case
Edit Del	Provider Activation	Provider_Activation		Healthcare Practitioner Facility; Task

Queue Name: **Privilege_Administrative_Review**
Supported Objects: **Case**

Queue Name: **Privilege_Board_Review**
Supported Objects: **Case**

Queue Name: **Provider_Activation**
Supported Objects: **Healthcare Practitioner Facility; Task**

Approval Process

Create a new Approval Process for the **Case** object. The Approval process Unique Name must be **Provider_Privilege_Request**

1. Select to Manage Approval Process for Case, then Create New Approval Process with the Standard Setup Wizard

SETUP Approval Processes

Approval Processes
Case

Approvals are complex business processes that require information gathering and planning before implementing. It is recommended that you follow the instructions below before getting started.

1. Read the help topic
2. View the checklist
3. Create a custom user hierarchical relationship field
4. Create email templates
5. Create an approval process using either the Jump Start or Standard Wizard
6. Add Approval History Related List to all page layouts
7. Activate the process to deploy to your users

Manage Approval Processes For: **Case**

A listing of both active and inactive approval processes for **Cases** is displayed below. To create a new approval process, click Create New Approval Process then select Use Jump Start Wizard to set up your approval process in a few short steps. Or, select Use Standard Wizard to configure all approval options.

Create New Approval Process

- Use Jump Start Wizard
- Use Standard Setup Wizard**

Active Approval Processes

No approval processes available

Inactive Approval Processes

No approval processes available

2. Set Process Name to **Provider Privilege Request** and Unique Name to **Provider_Privilege_Request**

SETUP Approval Processes

New Approval Process
Cases

Step 1. Enter Name and Description Step 1 of 6

Enter a name and description for your new approval process.

Enter Name and Description

Process Name **Provider Privilege Request**

Unique Name **Provider_Privilege_Request**

Description

Next Cancel

3. Specify Entry Criteria: Case: Case Record Type equals **Provider Privilege Type Request** AND Case: Status equals **Board Review**

SETUP
Approval Processes

New Approval Process
Cases Help for this Page

Step 2. Specify Entry Criteria Step 2 of 6

Previous Next Cancel

If only certain types of records should enter this approval process, enter that criteria below. For example, only expense reports from employees at headquarters should use this approval process.

Specify Entry Criteria

Use this approval process if the following **criteria are met** :

Field	Operator	Value	
Case: Case Record Type	equals	Provider Privilege Type	AND
Case: Status	equals	Board Review	AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Previous Next Cancel

- Specify who should be able to edit the record while in the approval process. This selection may vary by implementation.

SETUP
Approval Processes

New Approval Process
Cases Help for this Page

Step 3. Specify Approver Field and Record Editability Properties Step 3 of 6

Previous Next Cancel

When you define approval steps, you can assign approval requests to different users. One of your options is to use a user field to automatically route these requests. If you want to use this option for any of your approval steps, select a field from the picklist below. Also, when a record is in the approval process, it will always be locked-- only an administrator will be able to edit it. However, you may choose to also allow the currently assigned approver to edit the record.

Select Field Used for Automated Approval Routing

Next Automated Approver Determined By: **--None--**

☐ Use Approver Field of Case Owner

Record Editability Properties

☐ Administrators **ONLY** can edit records during the approval process.
☒ Administrators **OR** the currently assigned approver can edit records during the approval process.

Previous Next Cancel

- Optionally select an approval email template.

SETUP Approval Processes

New Approval Process
Cases

Step 4. Select Notification Templates Step 4 of 6

Select the email template that will be used to notify approvers that an approval request has been assigned to them. Note that this template will be used for all steps for this process. [Create a new email template](#)

Email Template

Approval Assignment Email Template

[Previous](#) [Next](#) [Cancel](#)

- Select the fields you would like to see on the Approval Page Layout.

SETUP Approval Processes

New Approval Process
Cases

Step 5. Select Fields to Display on Approval Page Layout Step 5 of 6

The approval page is where an approver will actually approve or reject a request. Using the options below, choose the fields to display on this page.

Available Fields		Selected Fields
Product Family	Add Remove	Case Number
Quality Score		Date/Time Opened
Question from Chatter	Up Down	Case Owner
Requirements Outstanding		Contact Name
Resolution	Requirement Approvals Outstanding	Account Name
Response Time (mins)		Privilege Type
Send Email Trigger		Subject
Send Field Service		
Service Contract		
Service Territory		
SLA Compliant		
SLA Type		
Status		
Stopped		

[Click here to view an example](#)

Approval Page Fields

☒ Display approval history information in addition to the fields selected above.

Security Settings

☒ Allow approvers to access the approval page only from within the Salesforce application. (Recommended)

☐ Allow approvers to access the approval page from within the Salesforce application, or externally from a wireless-enabled mobile device. [1](#)

[Previous](#) [Next](#) [Cancel](#)

- Leave the Initial Submitters with its default settings. Optionally enable submitters to recall approval requests.



SETUP

Approval Processes

New Approval Process

Cases

Help for this Page

Step 6. Specify Initial Submitters

Step 6 of 6

Previous

Save

Cancel

Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

Initial Submitters

Submitter Type

Search: Owner

for:

Find

Available Submitters

Allowed Submitters

--None--

Case Owner

Add

Remove

Page Layout Settings

☒ Add the Submit for Approval button and Approval History related list to all Case page layouts

Submission Settings

☐ Allow submitters to recall approval requests

Previous

Save

Cancel

8. Choose to create an approval step now.



SETUP

Approval Processes

What Would You Like To Do Now?

Help for this Page

You have just created an approval process. However, you cannot activate this process until you define at least one approval step. Would you like to do that now?

☒ Yes, I'd like to create an approval step now.

☐ I'll do this later. Take me to the approval detail page to review what I've just created.

☐ I'll do this later. Take me back to the listing of all approval processes for this object.

Go!

9. Enter Name Privilege Board Review and Step Number 1

10. Indicate that All records should enter this step.

11. Select Approver: Automatically assign to queue Privilege Board Review. Indicate if the approver's delegate can approve the request.

SETUP
Approval Processes

Approval Step Edit
Privilege Board Review

Step 3. Select Assigned Approver Step 3 of 3

Specify the user who should approve records that enter this step. Optionally, choose whether the approver's delegate is also allowed to approve these requests.

Select Approver

☐ Let the submitter choose the approver manually.
☒ Automatically assign to queue: **Privilege Board Review**
☐ Automatically assign to approver(s).
☒ The approver's delegate may also approve this request.

Previous Save Cancel

12. Select to create a new approval action for this step now of type **Field Update**.

SETUP
Approval Processes

What Would You Like To Do Now?

You have just created an approval step. You can optionally specify workflow actions to occur upon approval or rejection of this step. Would you like to do that now?

☒ Yes, I'd like to create a new approval action for this step now. **Field Update**
☐ Yes, I'd like to create a new rejection action for this step now. **Task**
☐ No, I'll do this later. Take me to the approval process detail page to review what I've just created.

Go!

13. Name the action **Update Case Status**. Select Field to Update: **Status**. Set to A specified Value: **Closed - Approved**. Then select **Save**.

SETUP
Approval Processes

Edit Field Update
Update Case Status

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit Save Save & New Cancel

Identification Required Information

Name: **Update Case Status**
 Unique Name: **Update_Case_Status**
 Description:
 Object: **Case**
 Field to Update: **Status**
 Field Data Type: **Picklist**
 Re-evaluate Workflow Rules after Field Change: ☐

Specify New Field Value

Picklist Options

☐ The value above the current one
☐ The value below the current one
☒ A specific value: **Closed - Approved**

Save Save & New Cancel

14. Select to add a new Field Update Rejection Action for Approval Step 1.

Approval Processes
Case: Provider Privilege Request

Process Definition Detail

Process Name: Provider Privilege Request
Unique Name: Provider_Privilege_Request
Description: (Case: Case Record Type EQUALS Provider Privilege Type Request) AND (Case: Status EQUALS Board Review)
Entry Criteria: Administrator OR Current Approver
Record Editability: Allow Submitters to Recall Approval Requests
Approval Assignment Email Template: Case Owner
Initial Submitters: Case Owner
Created By: Jake Benardot, 9/10/2024, 2:51 PM
Modified By: Jake Benardot, 9/10/2024, 2:53 PM

Initial Submission Actions

Action Type: Record Lock
Description: Lock the record from being edited

Approval Steps

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
1	1	Privilege Board Review			Queue: Privilege Board Review	Final Rejection

Approval Actions

Action Type: Field Update
Description: Update Case Status

Rejection Actions

You have not yet defined any actions

Field Update

15. Name the item Update Case Status - Declined. Set the Field to Update: Status. Select A specific value: Closed - Declined. Then select Save.

Field Updates
Update Case Status - Declined

Define the field update, including the object associated with the workflow rule, approval process, or entitlement process, the field to update, and the value to apply. Note that the field to update may be on a related object. Fields are shown only for the type that you select.

Field Update Edit

Save Save & New Cancel

Identification

Name: Update Case Status - C
Unique Name: Update_Case_Status_I
Description:
Object: Case
Field to Update: Status
Field Data Type: Picklist
Re-evaluate Workflow Rules after Field Change: ☐

Specify New Field Value

Picklist Options

☐ The value above the current one
☐ The value below the current one
☒ A specific value: Closed - Declined

Save Save & New Cancel

The Approval Process setup screen should look like this.


Approval Processes

Approval Processes

Case: Provider Privilege Request

[Back to Approval Process List](#)

[Help for this Page](#)

Process Definition Detail

Edit

Clone

Delete

Activate

Process Name	Provider Privilege Request	Active	☐
Unique Name	Provider_Privilege_Request	Next Automated Approver Determined By	
Description	(Case: Case Record Type EQUALS Provider Privilege Type Request) AND (Case: Status EQUALS Board Review)		
Entry Criteria	(Case: Case Record Type EQUALS Provider Privilege Type Request) AND (Case: Status EQUALS Board Review)		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	☒
Approval Assignment Email Template			
Initial Submitters	Case Owner		
Created By	Jake Benardot, 9/10/2024, 2:51 PM	Modified By	Jake Benardot, 9/10/2024, 2:55 PM

Initial Submission Actions

Add Existing

Add New

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps

New Approval Step

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Hide Actions Edit Del	1	Privilege Board Review			Queue:Privilege Board Review	Final Rejection

Approval Actions

Add Existing

Add New

Action	Type	Description
Edit Remove	Field Update	Update Case Status

Rejection Actions

Add Existing

Add New

Action	Type	Description
Edit Remove	Field Update	Update Case Status - Declined

Final Approval Actions

Add Existing

Add New

Action	Type	Description
Edit	Record Lock	Lock the record from being edited

Final Rejection Actions

Add Existing

Add New

Action	Type	Description
Edit	Record Lock	Unlock the record for editing

Recall Actions

Add Existing

Add New

Action	Type	Description
Record Lock		Unlock the record for editing

Select the **Activate** button for this Approval Process, then click OK in the browser message.

Create a Path

Create one new Path in Setup > Path Settings.

- Path Name: **Provider Privilege Type Review**
- API Reference Name: **Provider_Privilege_Type_Review**
- Object: **Case**
- Record Type: **Provider Privilege Type Request**
- Picklist: **Status**

Optionally select Fields to display or guidance to provide per status. Consider a message during the Board Review status like, "This record is locked during Board Review."

Activate Your Path: Should be turned **on**.

Add Field to Document Checklist Items Page Layout

Create a new page layout or edit the existing page layout for the Document Checklist Item object.

Setup > Object Manager > Document Checklist Item > Page Layout

The field **Privilege Document** must be added to the page layout for use with Provider Privileging.

Note: Record Types are not currently employed by the Provider Privileging app for the Document Checklist Item object. This may be relevant if you are using the Document Checklist Item object for other use cases and wish to create a separate page layout for Provider Privileging.

Status Values for Document Checklist Items

Ensure the Status field of the Document Checklist Items object includes values: New, Pending, Received, Accepted, and Rejected. All values must be Active. Activate any of these items showing as Inactive. Create any of these items that are not initially set up.



SETUP > OBJECT MANAGER

Document Checklist Item

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Triggers

Flow Triggers

Validation Rules

Document Checklist Item Field

Status

Back to Document Checklist Item Fields

Edit

See Field-Level Security

View Field Accessibility

Field Information

Field Label: Status

Field Type: Picklist

Help Text:

Description:

See Owner:

Field Usage:

Base Security Level:

Compliance Categorization:

Picklist Values Used

Active picklist values: 6 (1,000 mg)

Inactive picklist values: 0 (0 mg)

Field Dependencies

No dependencies defined.

Field Dependencies Help

Validation Rules

No validation rules defined.

Validation Rules Help

Status Picklist Values

New

Reorder

Refresh

Printable View

Chart Colors

Action	Status	API Name	Default	Chart Colors	Assigned By
Edit Doc Description	New	New	☒	Assigned dynamically	John Berardo, 9/18/2024, 6:50 AM
Edit Doc Description	Pending	Pending	☐	Assigned dynamically	John Berardo, 9/18/2024, 6:50 AM
Edit Doc Description	Received	Received	☐	Assigned dynamically	John Berardo, 9/18/2024, 10:30 AM
Edit Doc Description	Accepted	Accepted	☐	Assigned dynamically	John Berardo, 9/18/2024, 10:30 AM
Edit Doc Description	Rejected	Rejected	☐	Assigned dynamically	John Berardo, 9/18/2024, 10:30 AM

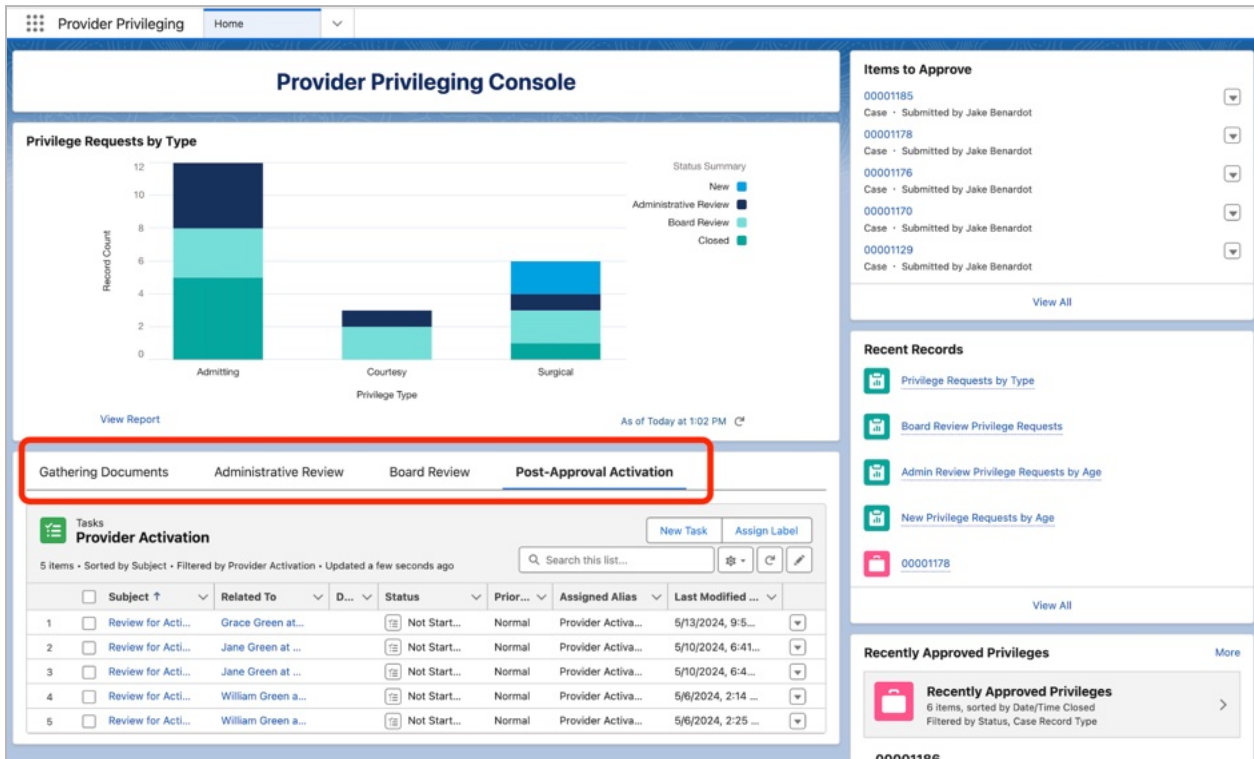
Inactive Values

No inactive Values values defined.

Ensure App Homepage Listviews are Setup

The Provider Privileging app homepage includes tabs for view into each key stage of the privileging request process:

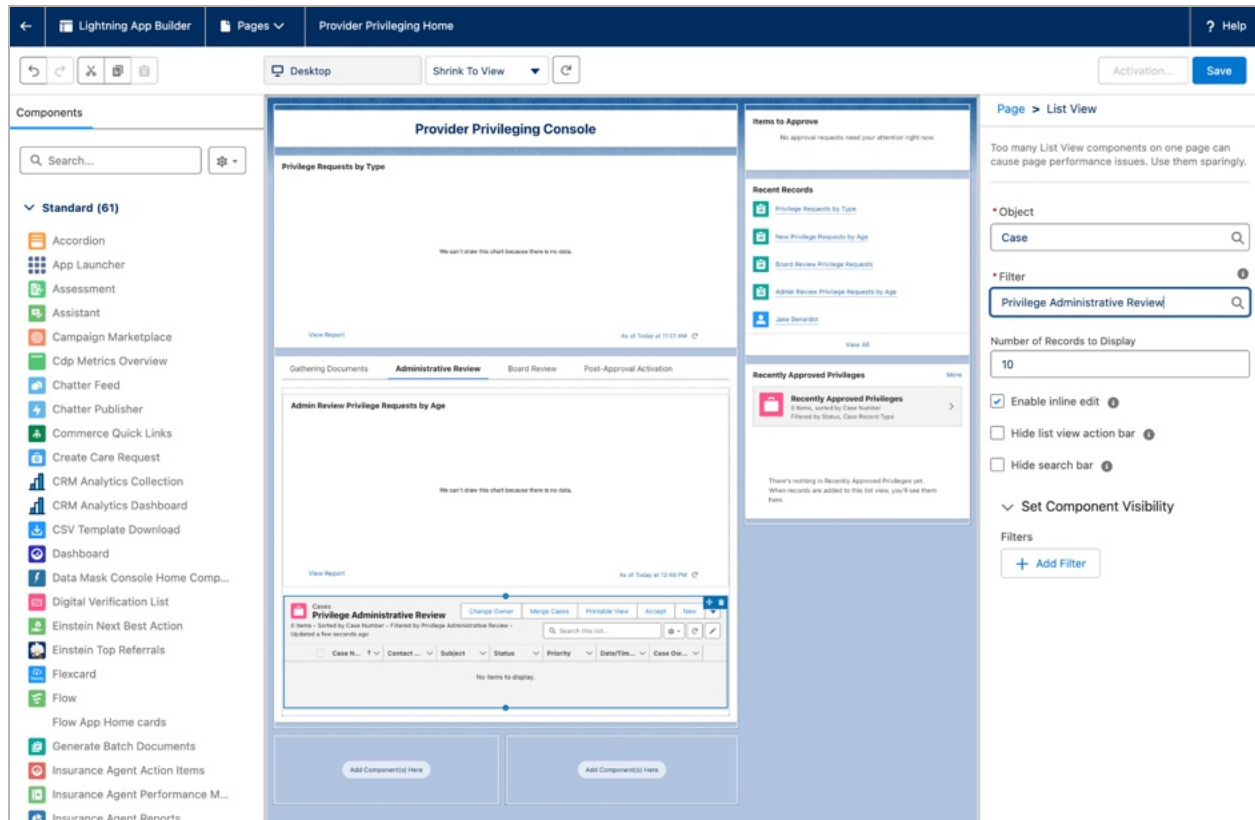
- Gathering Documents
- Administrative Review
- Board Review
- Post-Approval Activation



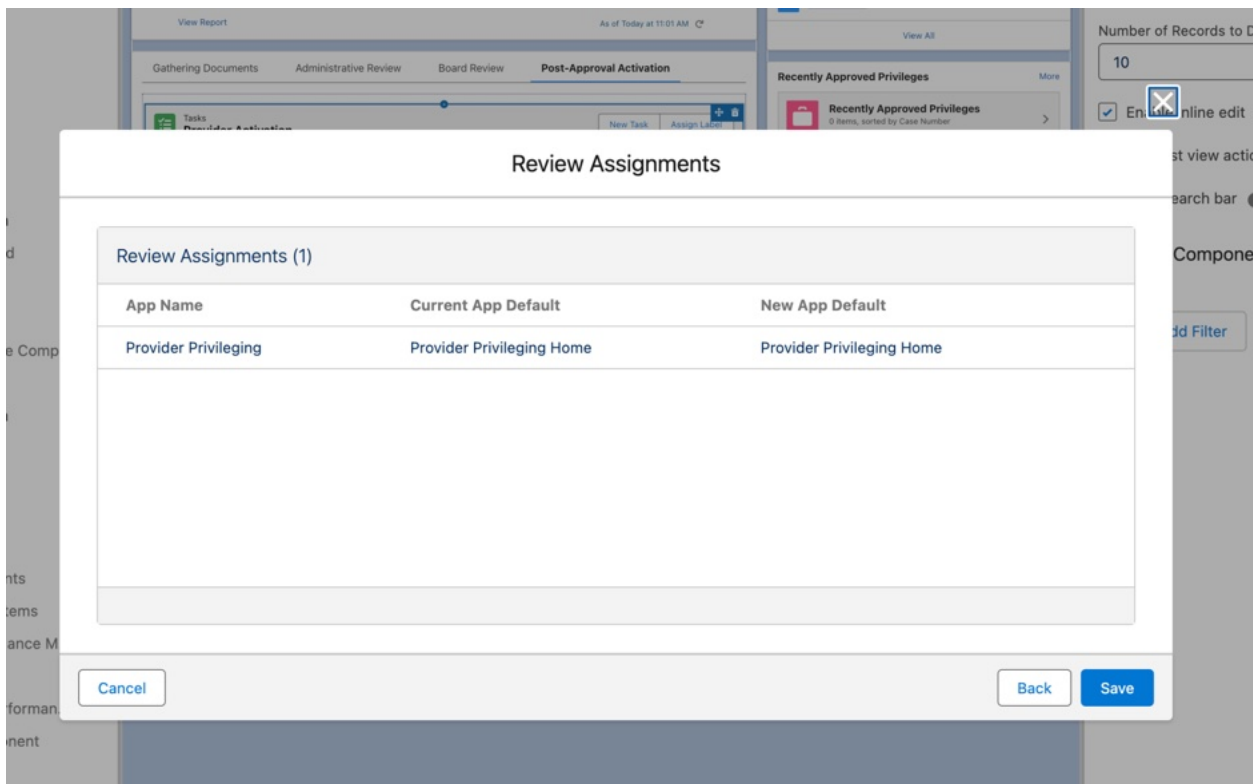
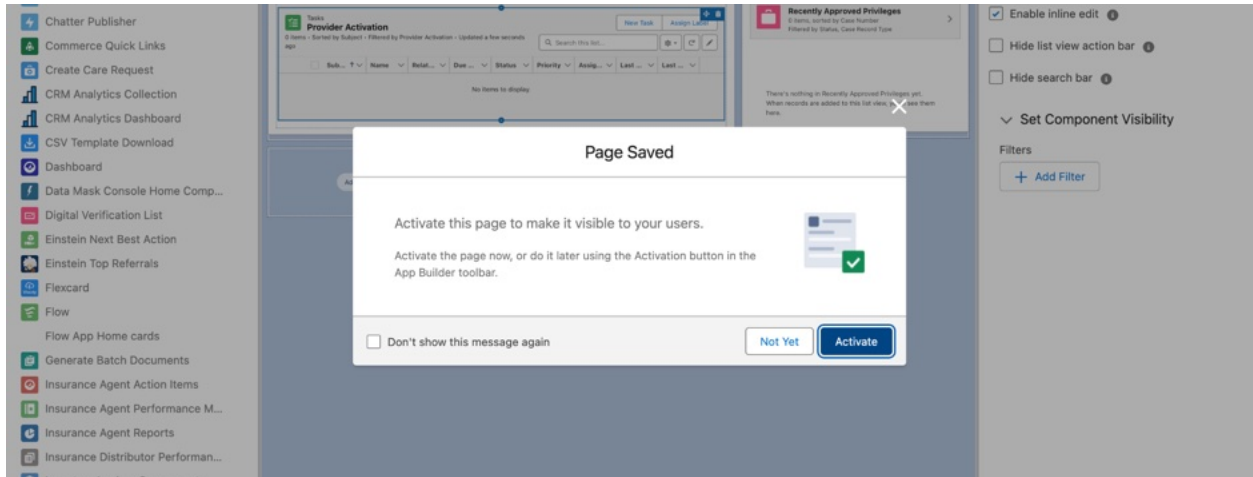
Three of these tabs include list views that are based on Queues which were created earlier in the manual setup steps. Therefore, list views must be updated to properly filter on the queue. Do this by selecting “Edit Page” and updating the List View filters as follows.

- Administrative Review: Case List View Filter Privilege Administrative Review
- Board Review: Case List View Filter Privilege Board Review
- Post-Approval Activation: Task List View Filter Provider Activation

Note: It may appear as if these are already properly set. However, they must be updated to align to the filter that is automatically created for the Queue.



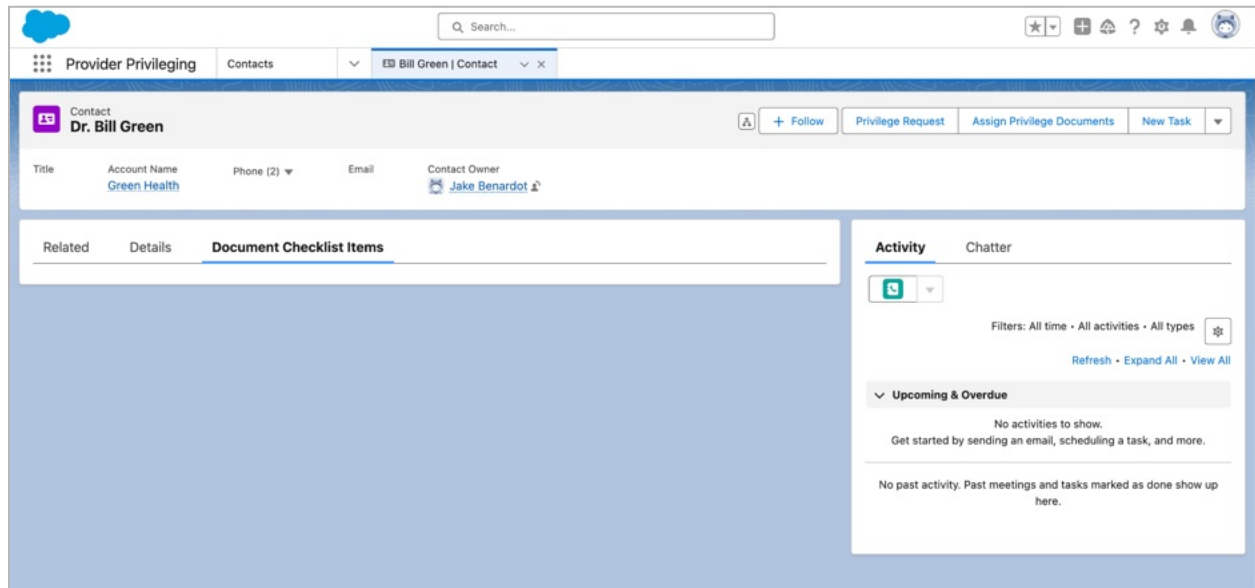
Once Saved you may need to Activate the page as the App default for the Provider Privileging app.



Set Up the View of Contacts

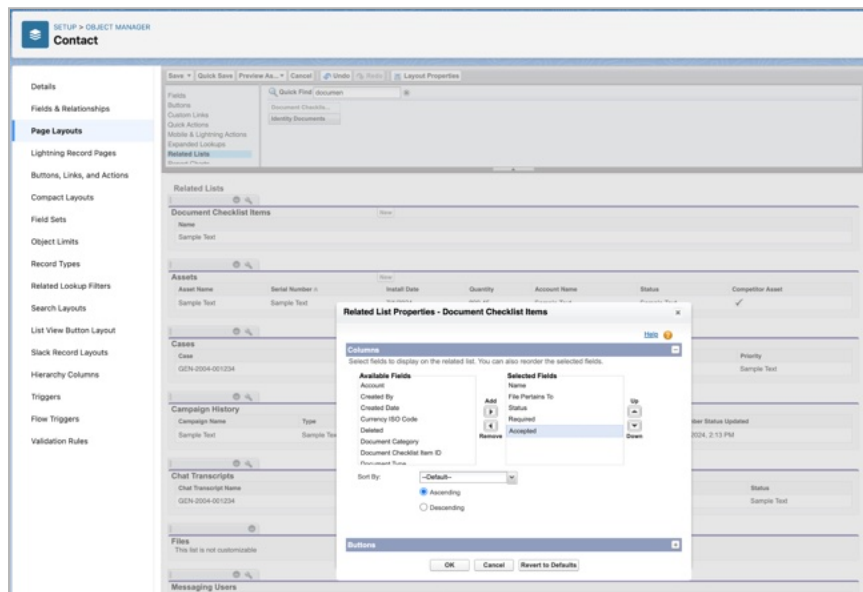
Using Person Accounts? See [Using Person Account Instead of Contact](#).

Navigate to an existing contact while in the Provider Privileging app. You may find that the Document Checklist Items tab is empty.



If this occurs, add the object Document Checklist Items as a related list for any page layout that will be associated with practitioners or individuals that may request privileges. Do this via Setup > Object Manager > Contact > Page Layouts.

Consider adding fields to the related list display for the object.



Activate Case Type Lightning Page

Open this Lightning Page from Lightning App Builder

- Page Label: `Provider Priv Request Type Case Record Page`
- Page API Name: `Provider_Priv_Request_Type_Case_Record_Page`

It may open in Read-Only mode, which is fine.

Select the Activation button, then activate the lightning page using the **App, Record Type, and Profile** option.

- Lightning App: `Provider Privileging` (enable for both Desktop and phone)
- Record Types: `Provider Privilege Type Request`
- Profiles: Select all relevant profiles for your implementation, including System Administrator

See Also: Additional Set Up Information

Additional Technical and Set Up Information

Submitting Privilege Requests via Alternative Options

Using Person Account Instead of Contact

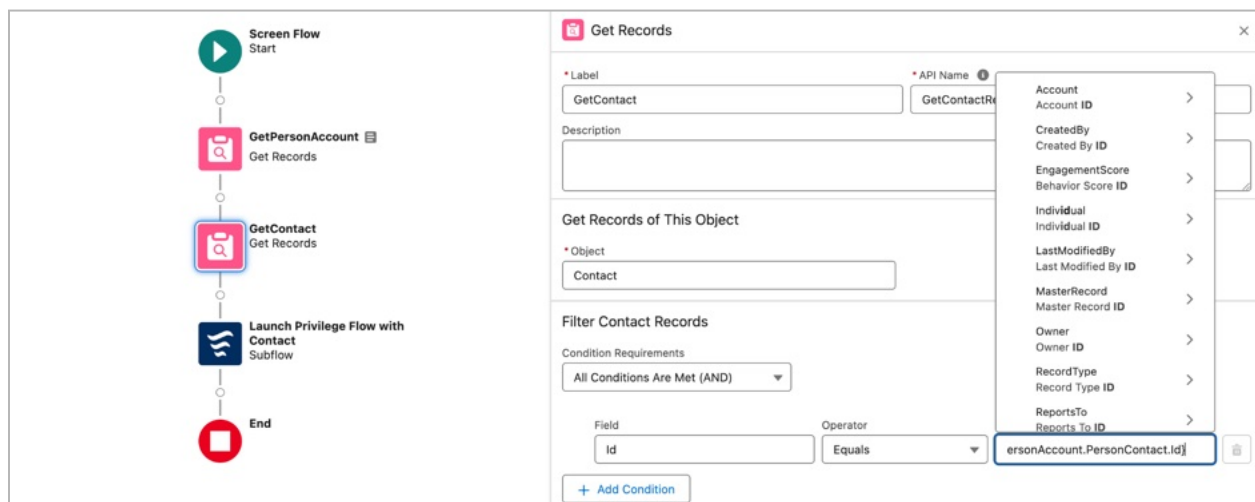
There are 2 key screen flows that apply to a practitioner

1. Initiating a new Privilege Request.
Flow Label: **Provider Privilege Request**
Flow API Name: `Provider_Privilege_Request`
2. Assigning Privilege Documents.
Flow Label: **Manage Provider Privilege Documents**
Flow API Name: `Manage_Provider_Privilege_Documents`

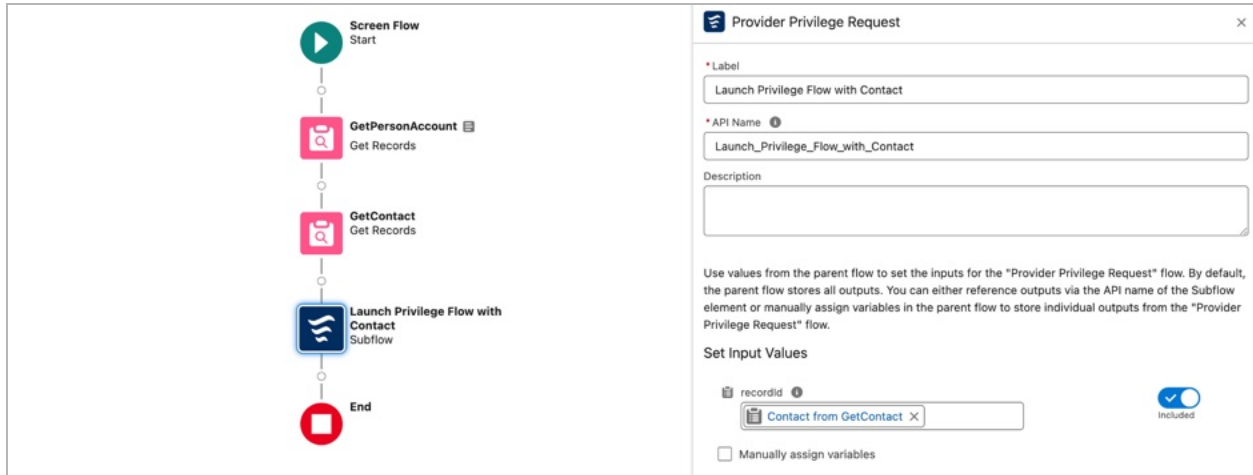
Each of these require that a contact record is passed into the flow.

If you are using Person Accounts instead of, or in addition to, Contact records, then you must create a Flow that retrieves the contact record from the Person Account. Then call the Privilege Request and Privilege Document screen flows using that newly retrieved Contact ID.

Retrieve the Contact ID from a Person Account via the PersonContact.Id field on the Account.



Then call the Provider Privilege Request and/or the Manage Provider Privilege Documents Flow with that value. You must pass in a Record (Single) Variable for the Contact, not a text field of the Contact ID.



Create Actions that can be added as buttons to the Person Account record page by referencing your newly created Flows. *Example:*

The image shows the 'Edit Account Action' configuration page in Salesforce.

Page Header: SETUP > OBJECT MANAGER, Account

Left Navigation Menu:

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions** (Selected)
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Edit Account Action: Privilege Request

Enter Action Information (Buttons: Save, Cancel)

Object Name: Account

Action Type: Flow

Flow: Flow - Provider Privilege Request from Person Account

Standard Label Type: --None--

Label: Privilege Request

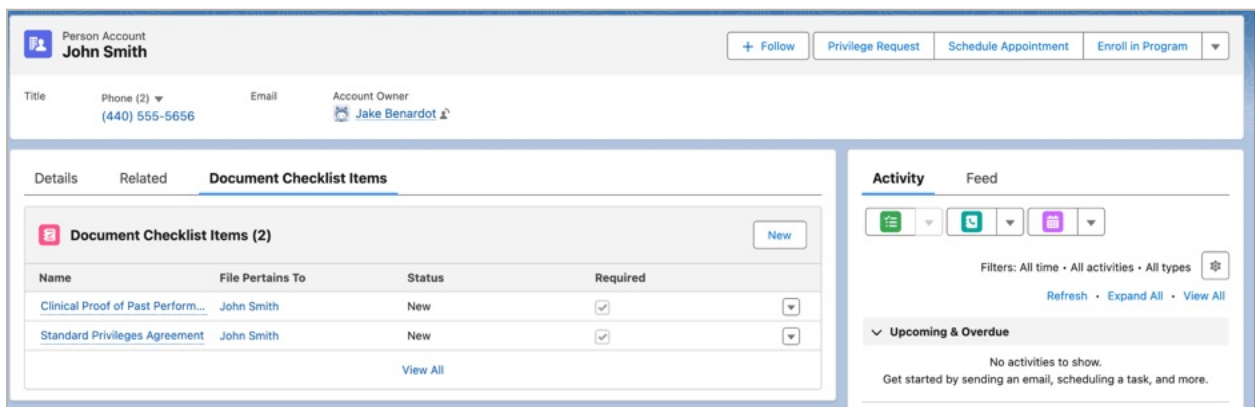
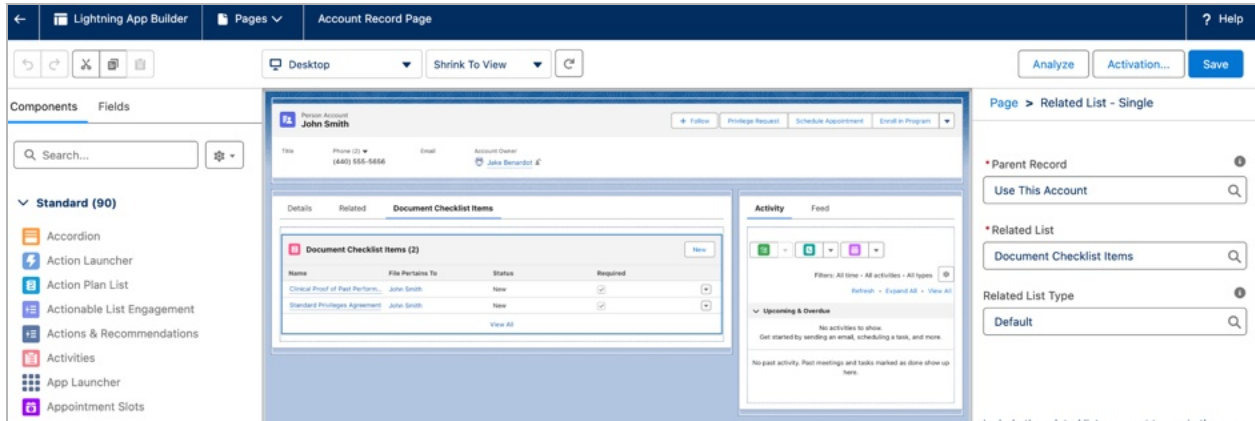
Name: Privilege_Request

Description: (Empty text area)

Icon: Change Icon

Buttons: Save, Cancel

Additional page layout items can be added as desired. For example, inclusion of Document Checklist Items for the Person Account record.



Starting a Privileging Request for a Practitioner Lead Record

Privilege requests associated with Lead records are not currently supported by this package. Therefore, a Lead record must be converted to a Contact or Person Account (see above) in order to begin a request for privileges.

Starting a Privileging Request for a Practitioner that is not yet known to your organization

Privilege requests must be associated with a Contact or Person Account record. If one of those records does not exist for the practitioner yet, one must be created in order to begin a request for privileges.

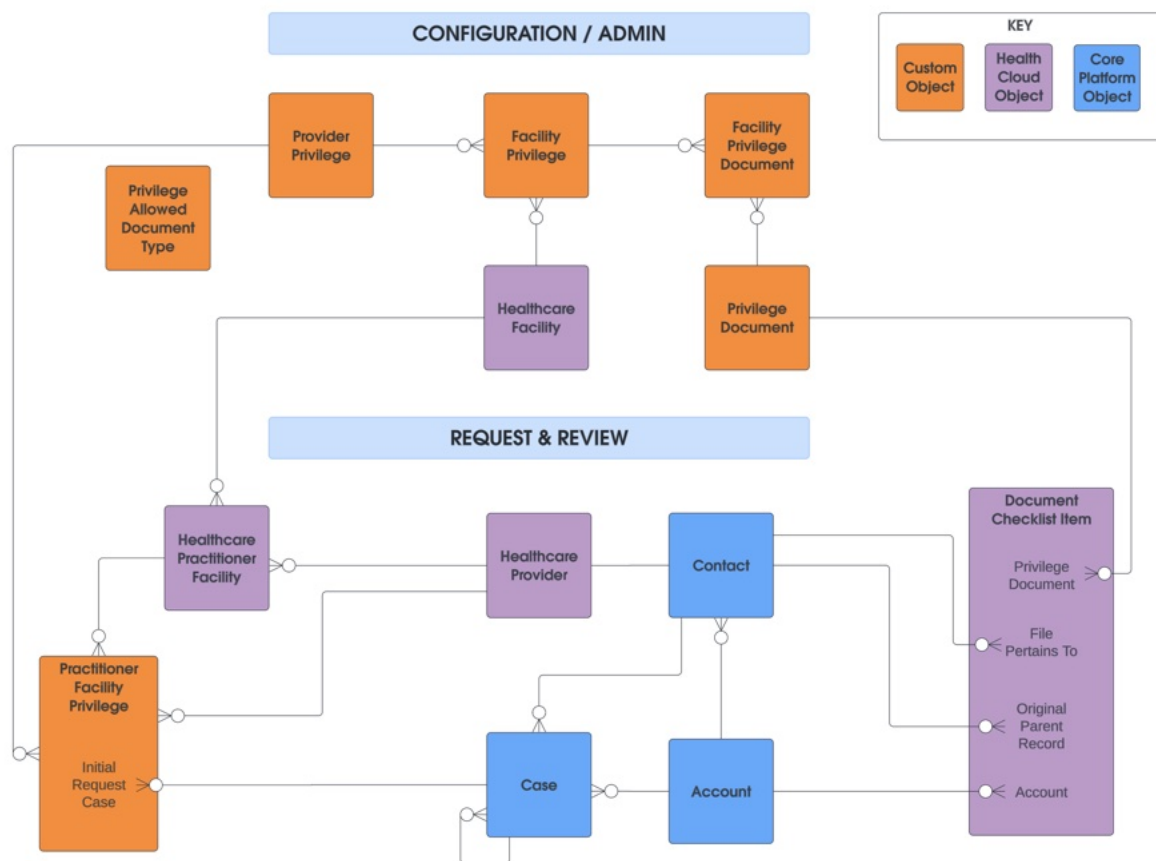
Adding the Privilege Request to a portal so it can be completed by the practitioner or their representative

This package does not include any portal-specific components. The following items are screen flows and therefore are capable of being embedded on a Salesforce Experience Cloud site. However, this is

not the intended use of these screen flows and has not been tested. If you attempt this you must ensure both the functionality and security, including data access, meet your organization standards.

3. Initiating a new Privilege Request.
Flow Label: **Provider Privilege Request**
Flow API Name: `Provider_Privilege_Request`
4. Assigning Privilege Documents.
Flow Label: **Manage Provider Privilege Documents**
Flow API Name: `Manage_Provider_Privilege_Documents`

Data Model



Object	Record Type	Lightning Page	Dynamic Elements in Page Layout	Page Layout	Compact Layout	Notes
Provider Privilege	N/A	Provider_Privilege_Record_Page	N/A	Provider Privilege Layout	Privilege Compact Layout	
Facility Privilege	N/A	Facility_Privilege_Record_Page	Field Sections, Related Lists	Facility Privilege Layout	Facility Privilege Compact	
Privilege Document	N/A	Privilege_Document_Record_Page	N/A	Privilege Document Layout	System Default	
Facility Privilege Document	N/A	Facility_Privilege_Document_Record_Page	Field Sections	Facility Privilege Document Layout	System Default	
Healthcare Facility	N/A	Provider_Priv_Healthcare_Facility_Record_Page	Highlights Panel Actions, Related Lists	Healthcare Facility Layout	System Default	
Healthcare Practitioner Facility	N/A	Provider_Priv_Healthcare_Practitioner_Facility_Record_Page	Related Lists	Healthcare Practitioner Facility Layout	System Default	
Practitioner Facility Privilege	N/A	Provider_Priv_Practitioner_Facility_Privilege_Record_Page	Field Sections	Practitioner Facility Privilege Layout	Practitioner Facility Priv Compact Layout	
Case	Provider Privileging	Provider_Priv_Parent_Case_Record_Page	Highlights Panel Actions, Field Sections, Related Lists	Provider Privileging Case Layout	System Default	Used for parent case for a privilege request submission
Case	Provider Privilege Type Request	Provider_Priv_Request_Type_Case_Record_Page	Highlights Panel Actions, Field Sections, Related Lists	Provider Privileging Type Case Layout	Privilege Type	Used for each privilege type requested in a submission
Document Checklist Item	N/A	Provider_Priv_Document_Checklist_Item_Record_Page	N/A	Document Checklist Item Layout	System Default	
Account	N/A	N/A	N/A	N/A	N/A	No configurations made to Account object
Contact	N/A	Privileges_Contact_Record_Page	Highlights Panel Actions, Field Sections, Related Lists	Contact Layout	System Default	No record types defined for Contacts