# Provider Privileging Documentation: Set Up

*Last updated September 30, 2024*

# 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!

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# 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

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# Manual Set Up Steps

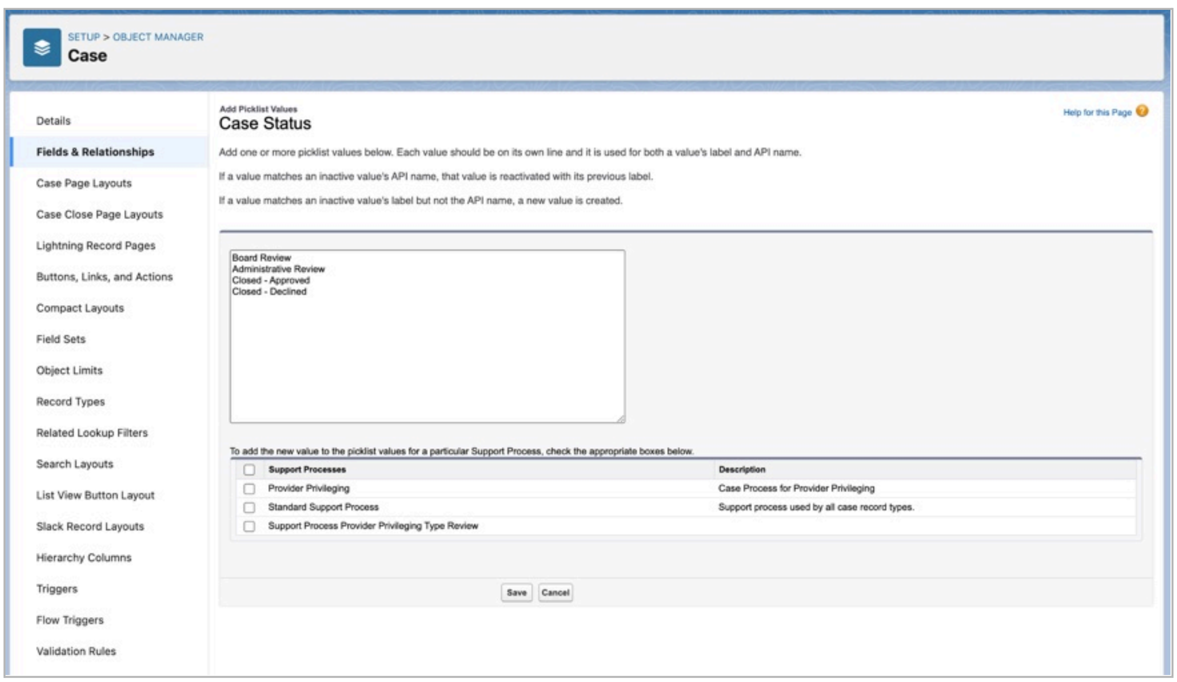
The following items cannot be included in a managed package and therefore must be set up manually in the destination Salesforce Org by a System Administrator. This setup should occur after installing the managed package, prior to use.

## 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.




**Step 2**

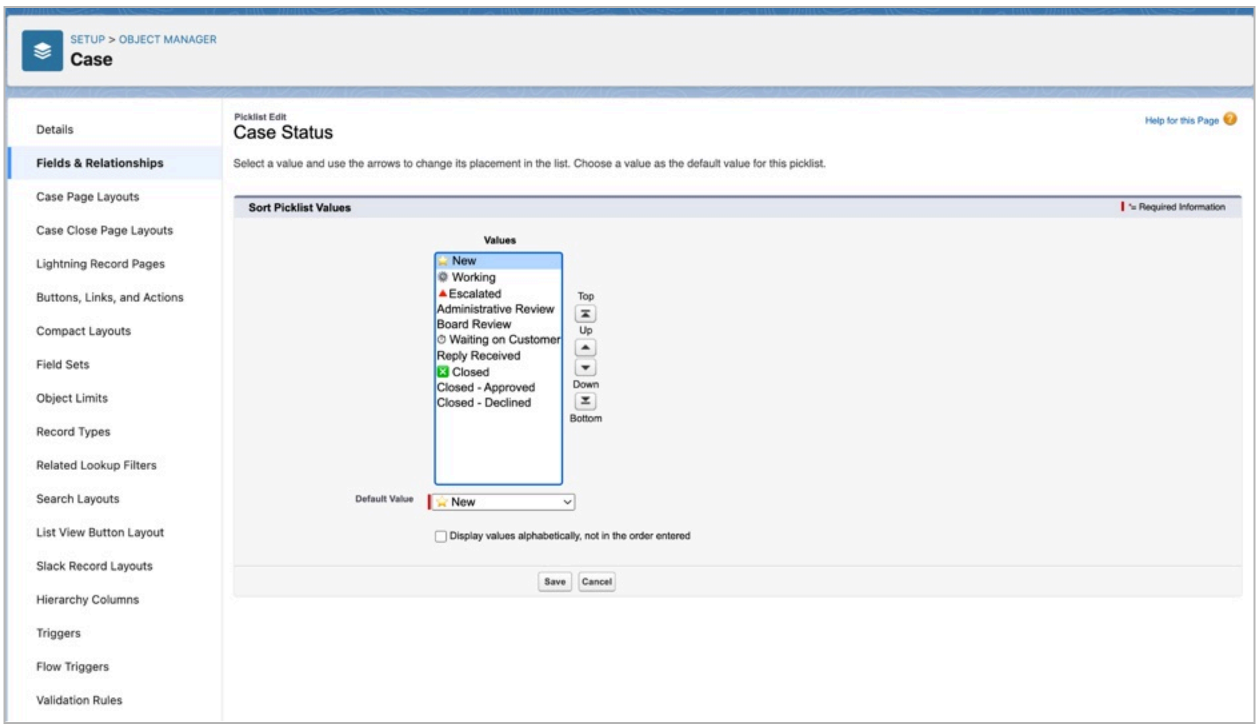
Ensure that `Closed - Approved` and `Closed - Declined` are set as Closed values.

**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.



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

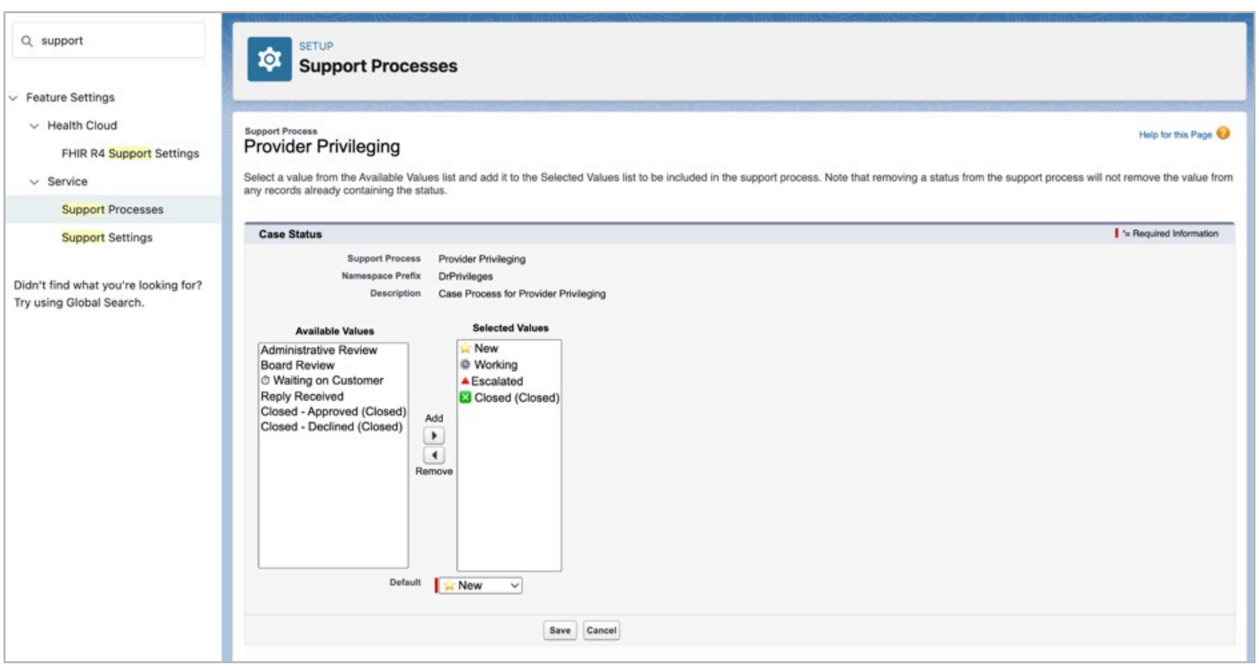
**Case Status Picklist Values** — New | Reorder | Replace | Printable View | Chart Colors

| 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)`

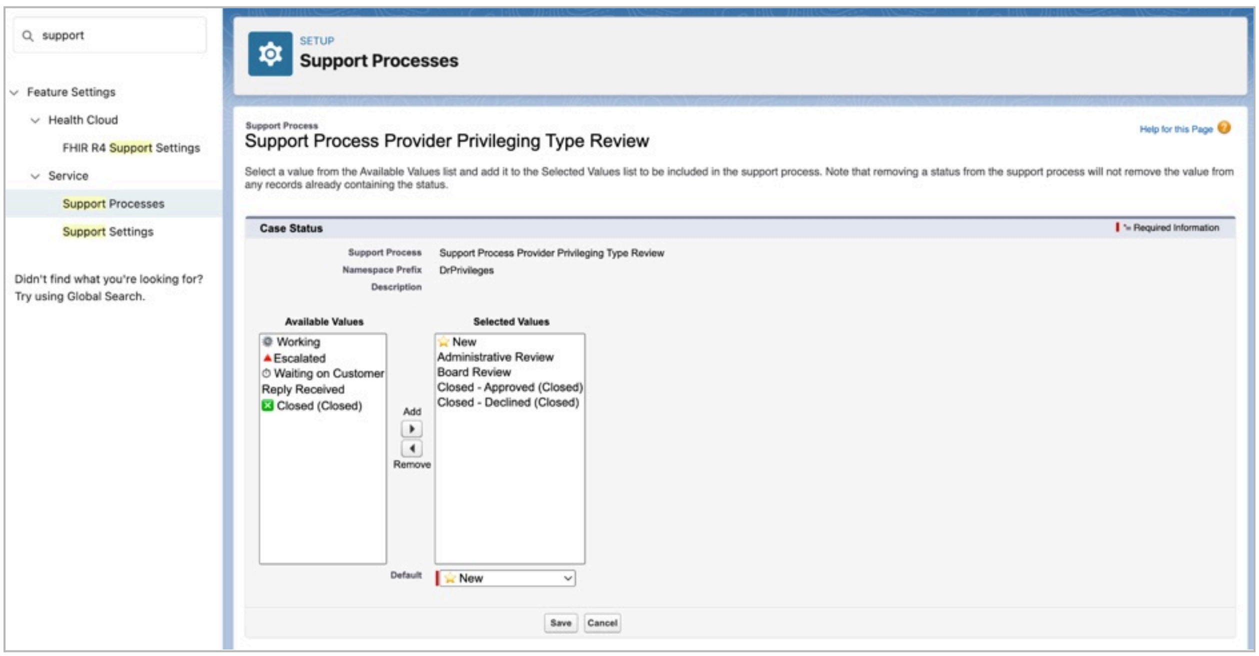
With a Default value of `New`



**Step 5**

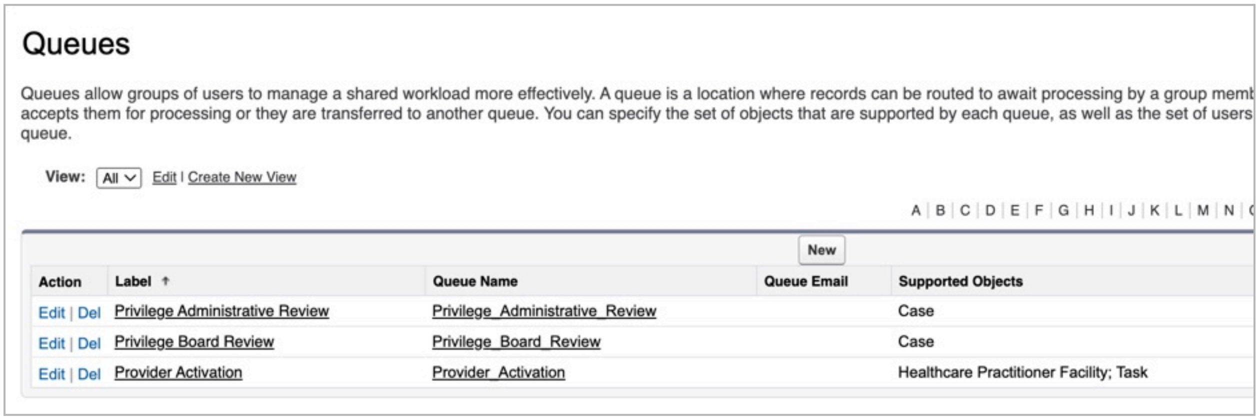
Update the `Support Process Provider Privileging Type Review` to include Selected Values
`New`
`Administrative Review`
`Board Review`
`Closed - Approved (Closed)`
`Closed - Declined (Closed)`

With a Default value of `New`



# 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 memb
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
queue.

View: All Edit | Create New View

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

New

| 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**

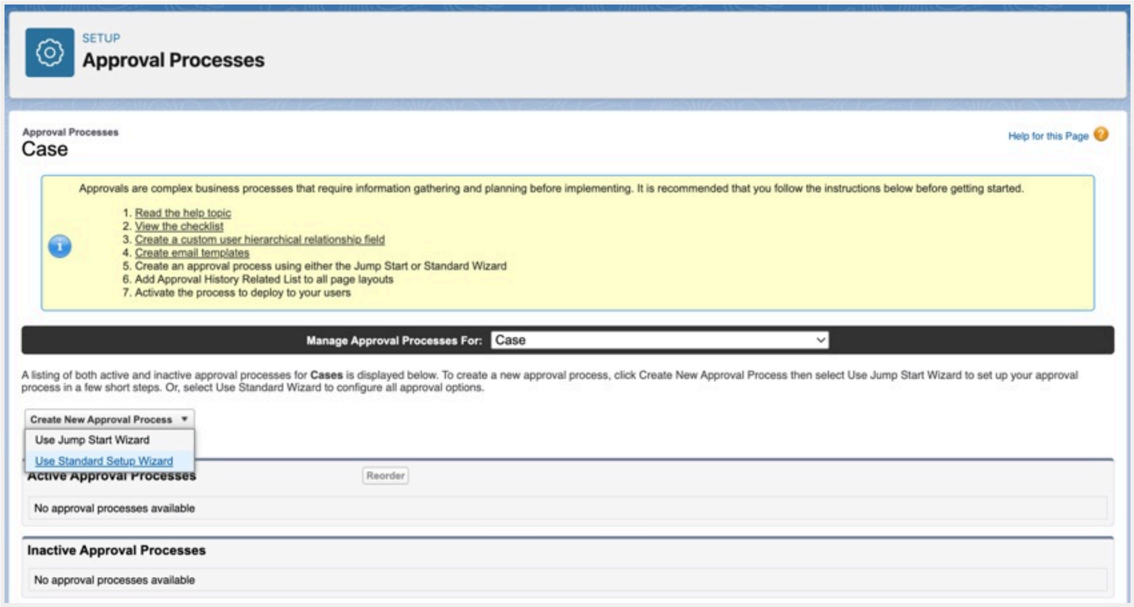
Queue Name: **Privilege_Board_Review**
Supported Objects: **Case**

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

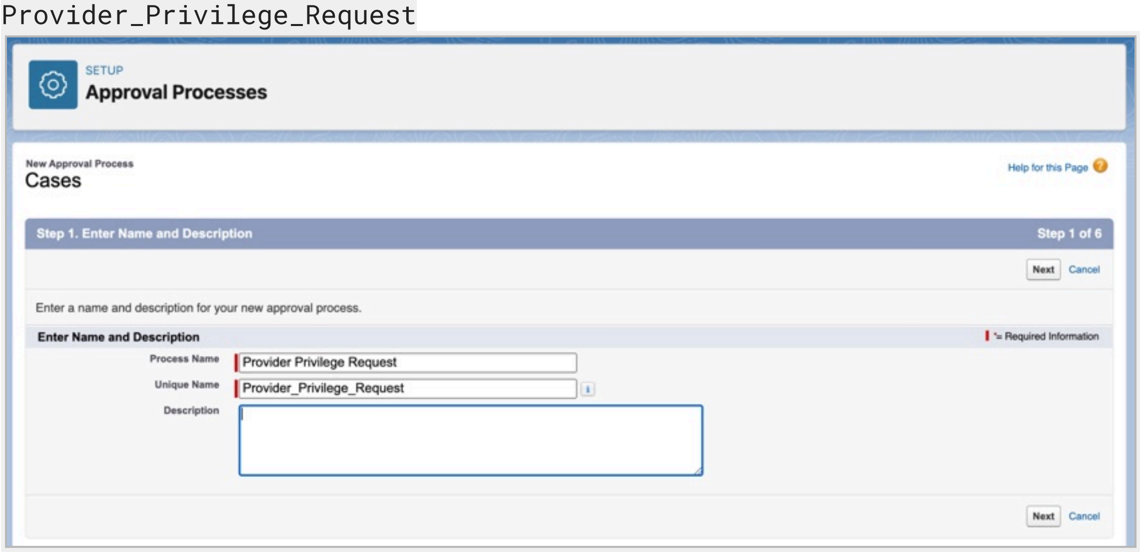
# Approval Process

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

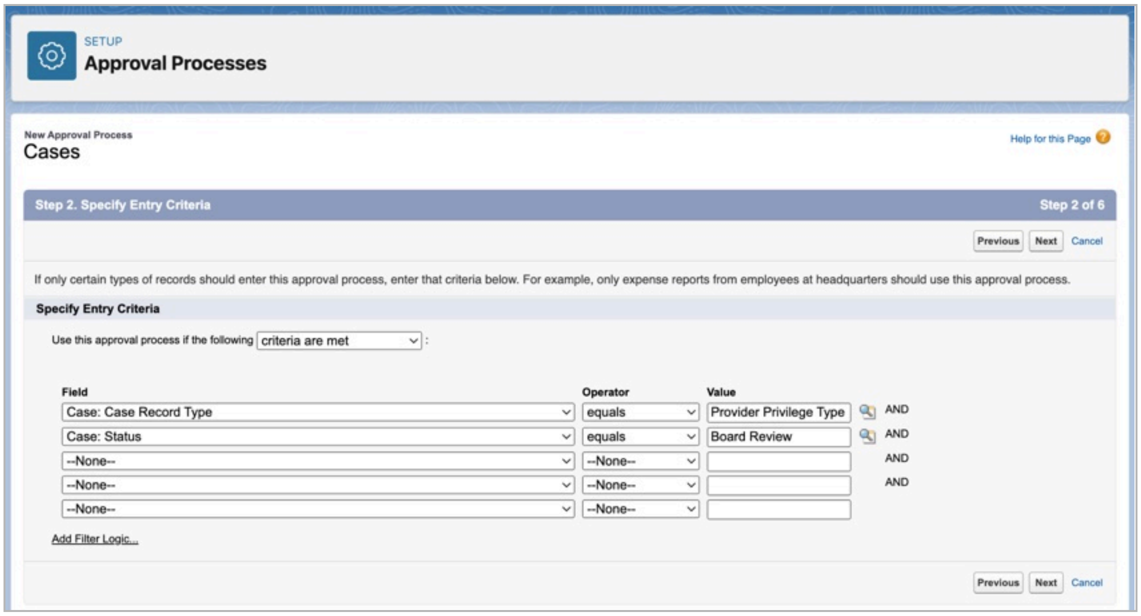
1. Select to Manage Approval Process for `Case`, then Create New Approval Process with the Standard Setup Wizard



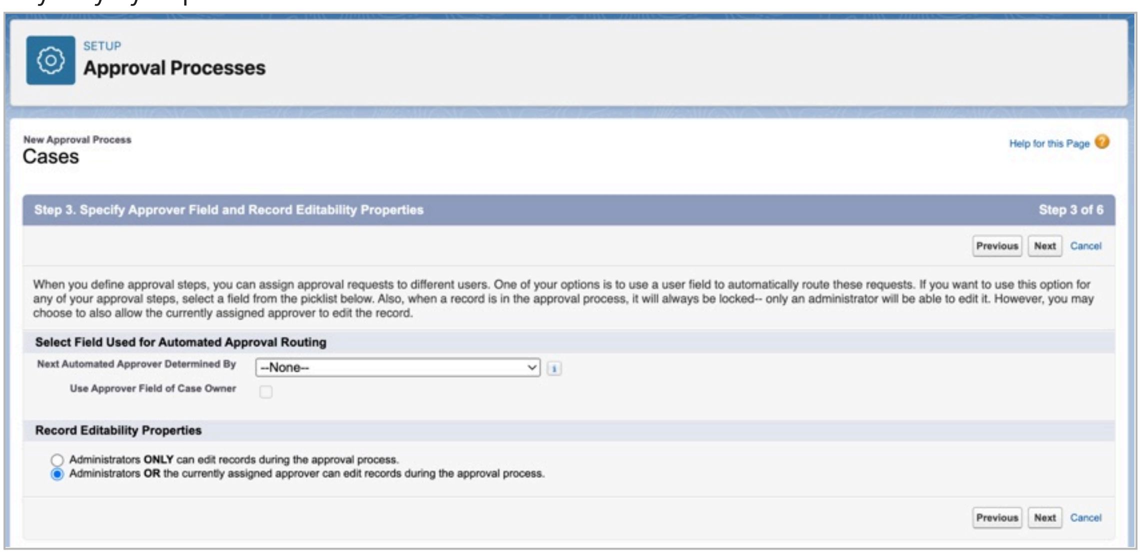

2. Set Process Name to `Provider Privilege Request` and Unique Name to `Provider_Privilege_Request`



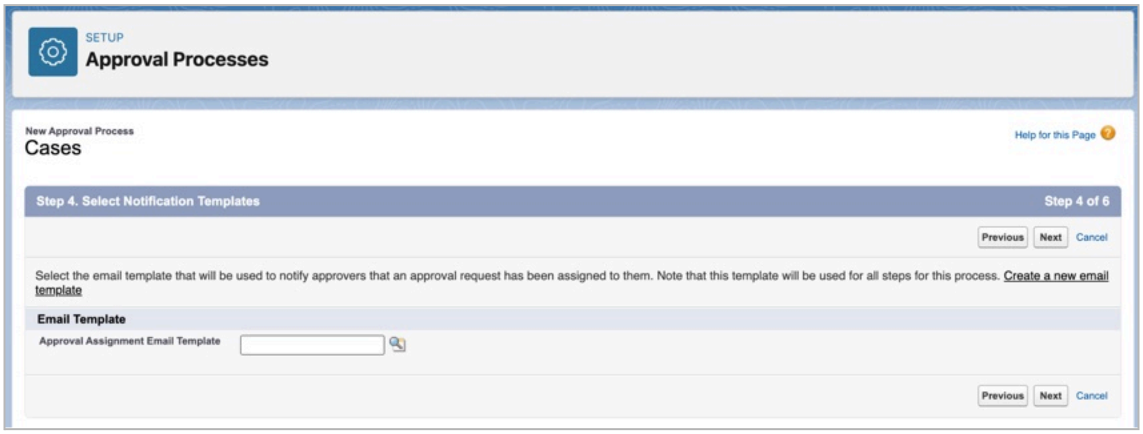

3. Specify Entry Criteria: Case: Case Record Type equals `Provider Privilege Type Request` AND Case: Status equals `Board Review`



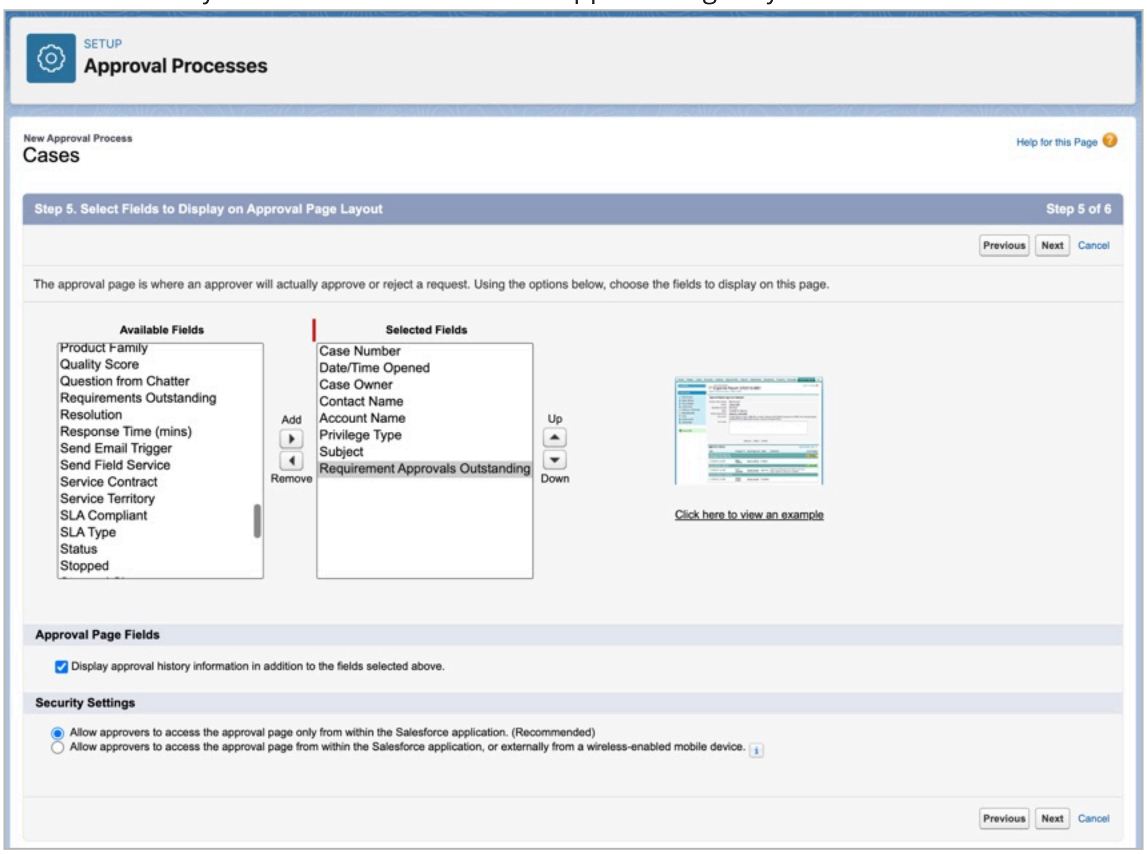

4. Specify who should be able to edit the record while in the approval process. This selection may vary by implementation.



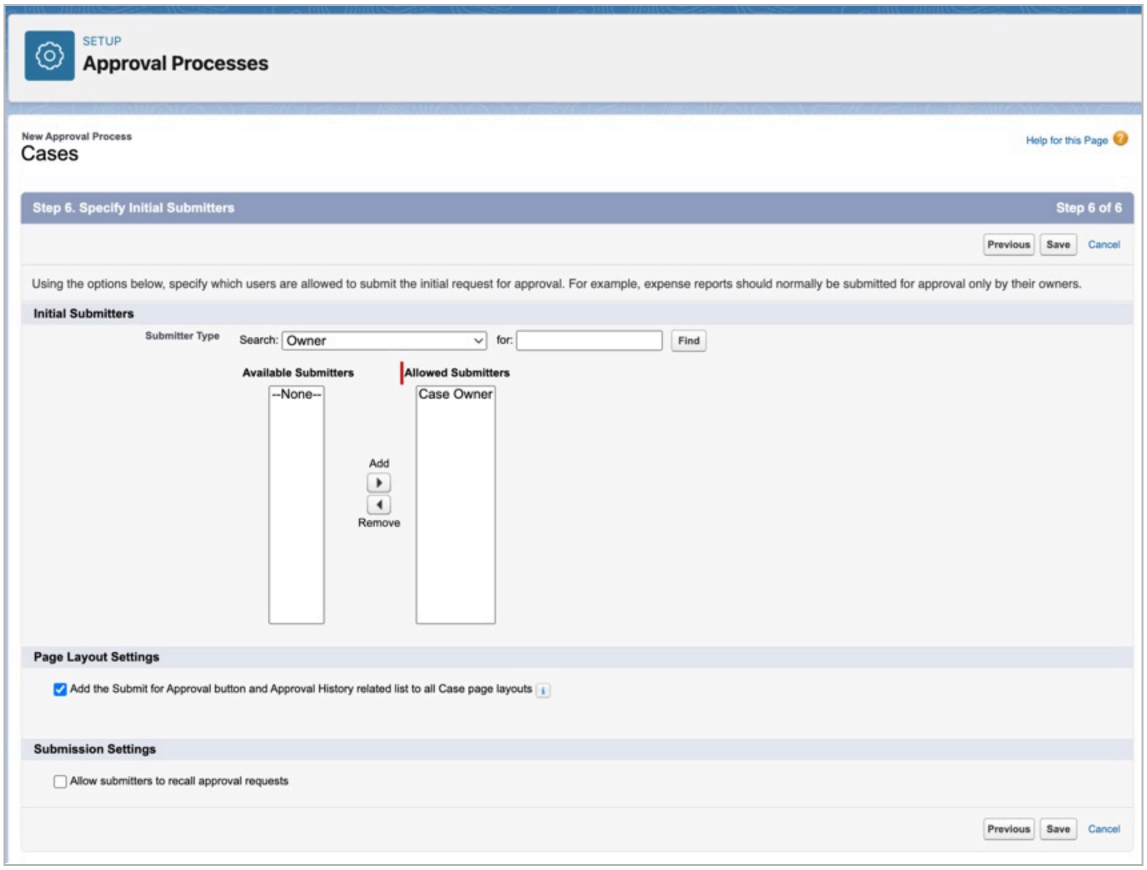
5. Optionally select an approval email template.



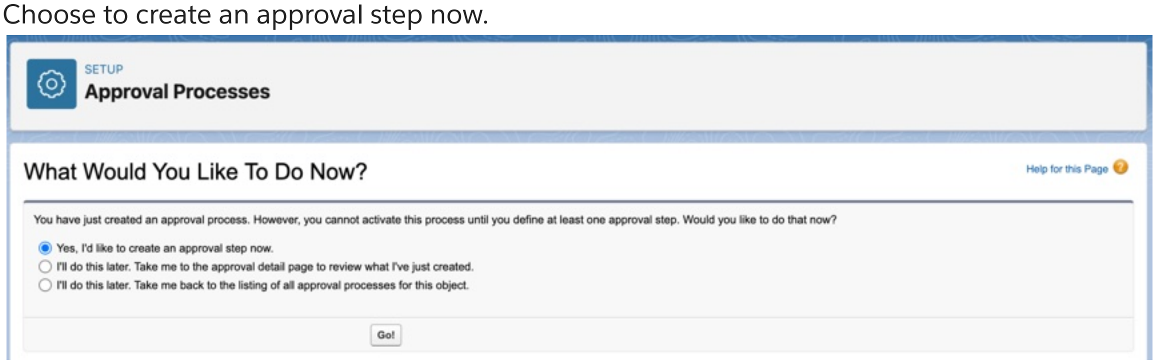

6. Select the fields you would like to see on the Approval Page Layout.



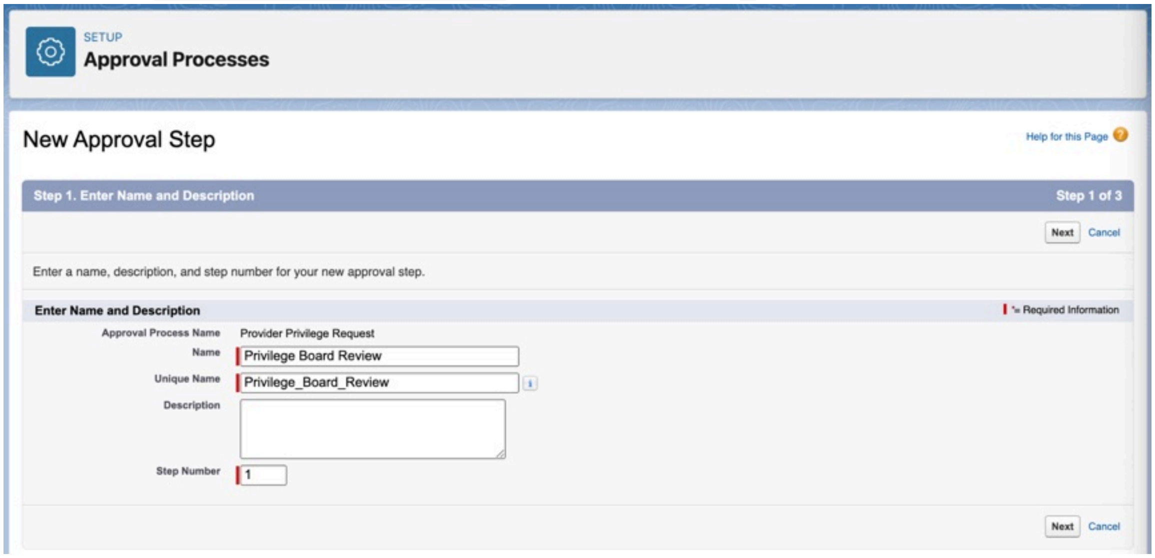

7. Leave the Initial Submitters with its default settings. Optionally enable submitters to recall approval requests.



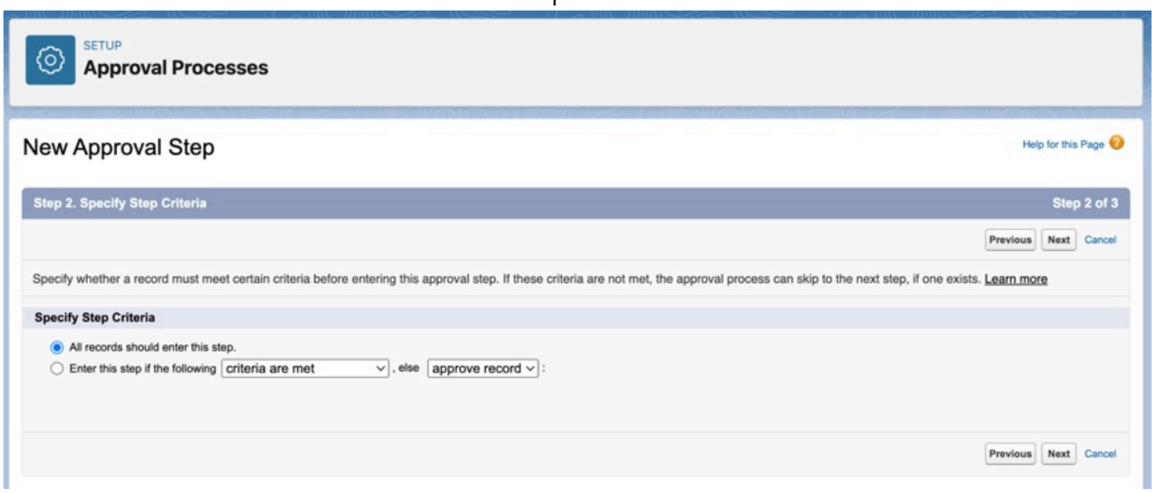

8. Choose to create an approval step now.



9. Enter Name `Privilege Board Review` and Step Number `1`

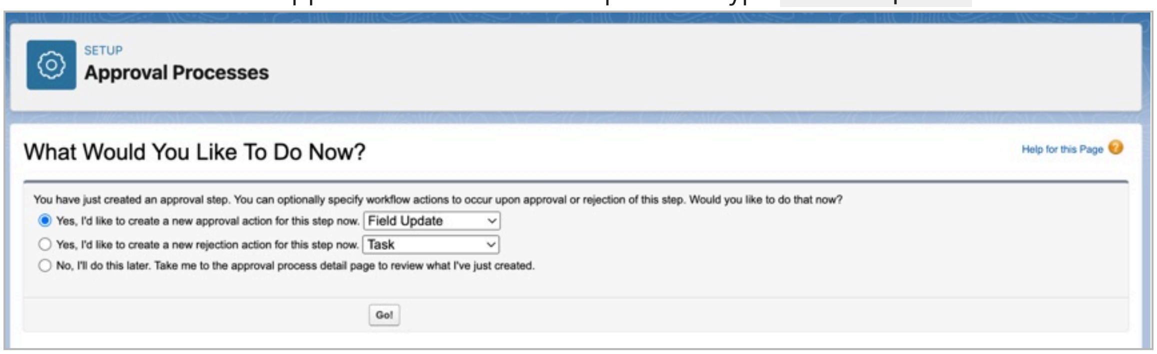



10. Indicate that All records should enter this step.

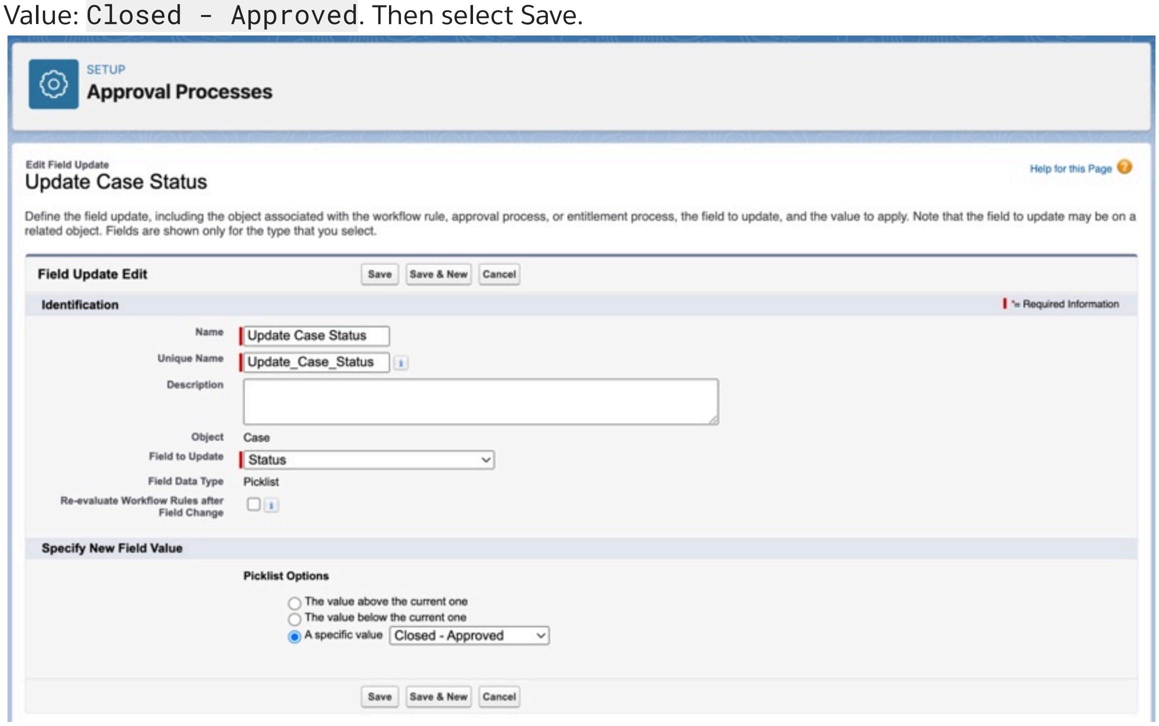



11. Select Approver: Automatically assign to queue `Privilege Board Review`. Indicate if the approver's delegate can approve the request.

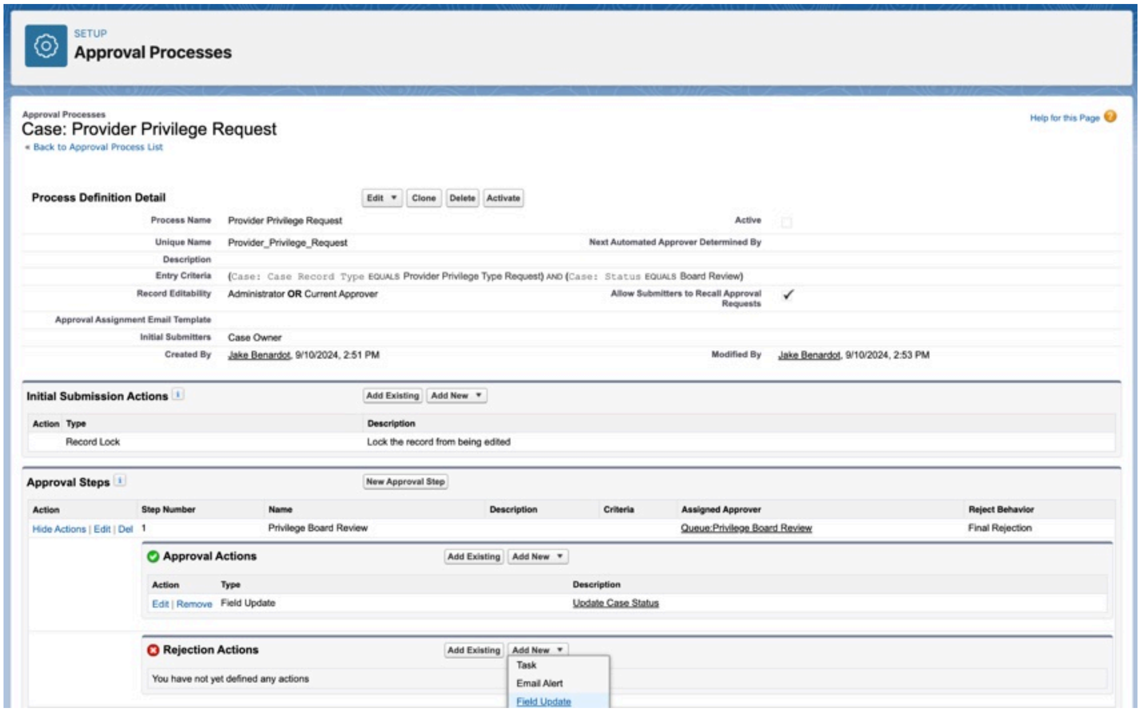

12. Select to create a new approval action for this step now of type `Field Update`.



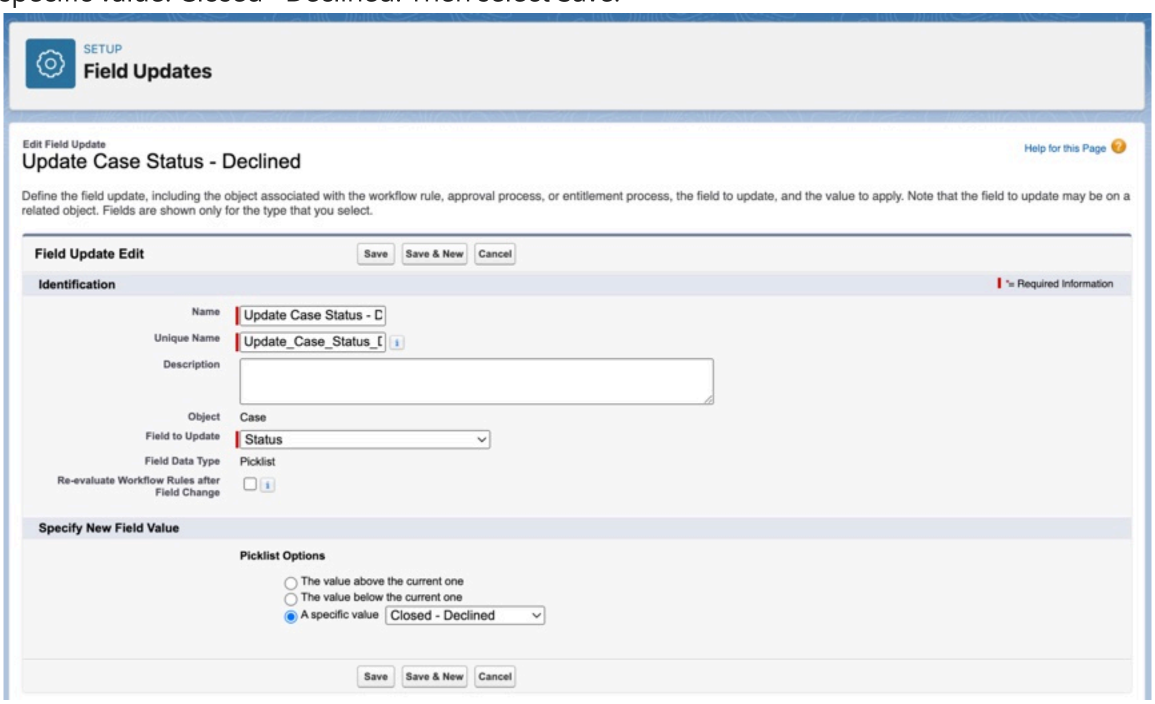

13. Name the action `Update Case Status`. Select Field to Update: `Status`. Set to A specified Value: `Closed - Approved`. Then select Save.



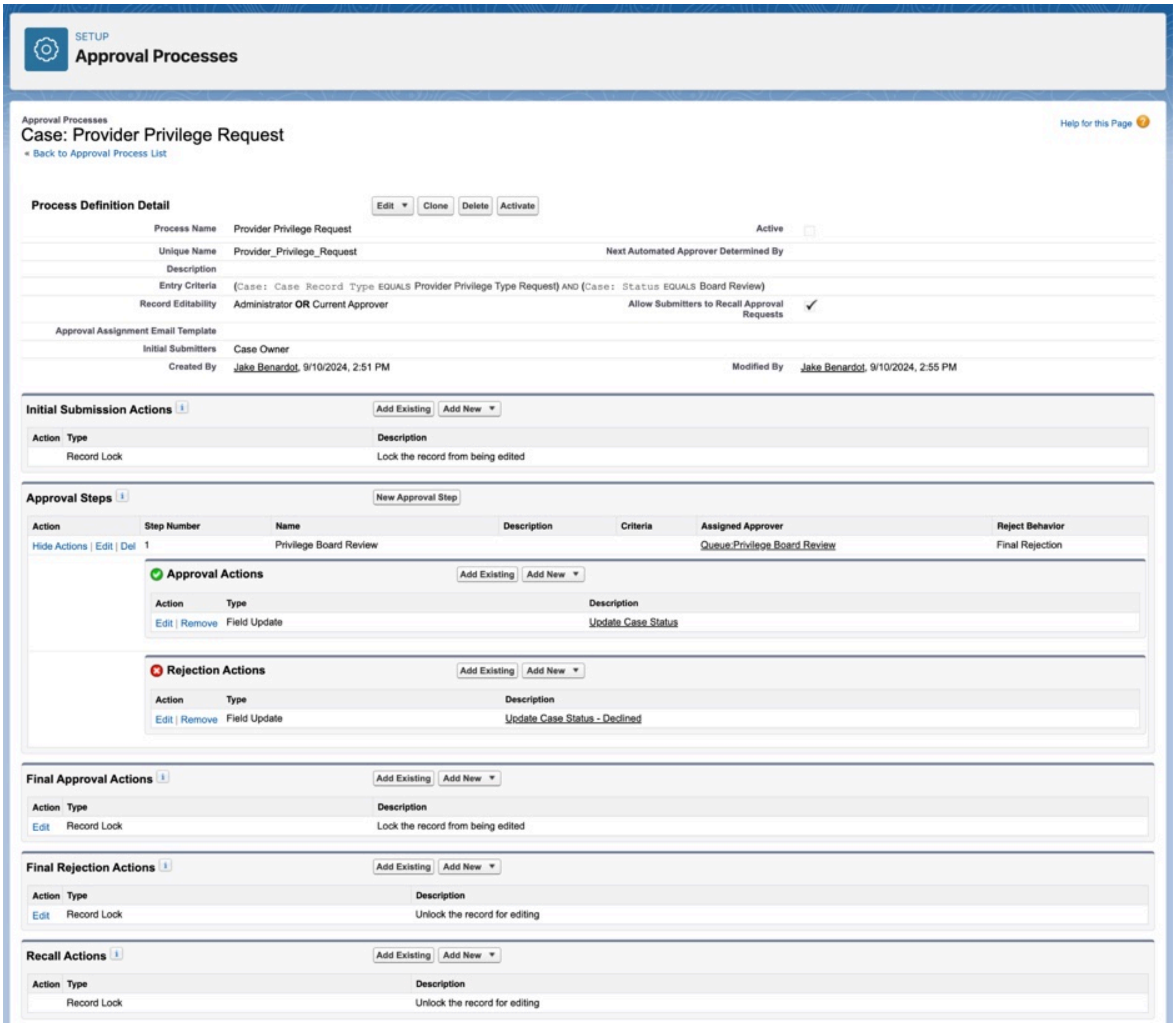
14. Select to add a new Field Update Rejection Action for Approval Step 1.




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



The Approval Process setup screen should look like this.




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.

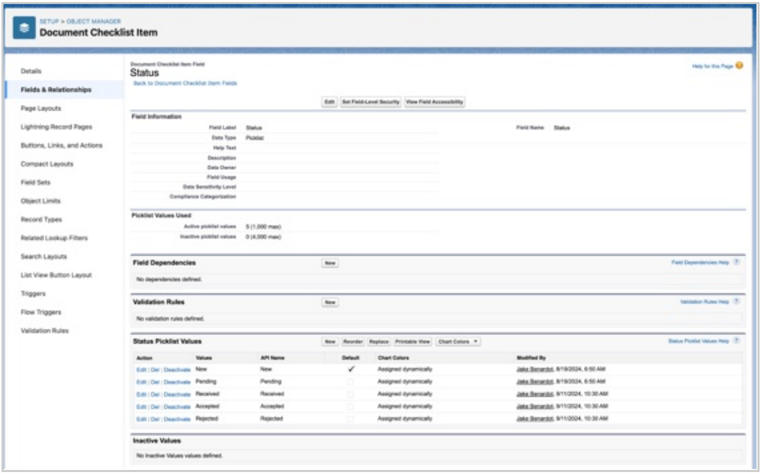
Setup > Object Manager > Document Checklist Item > Page Layout

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

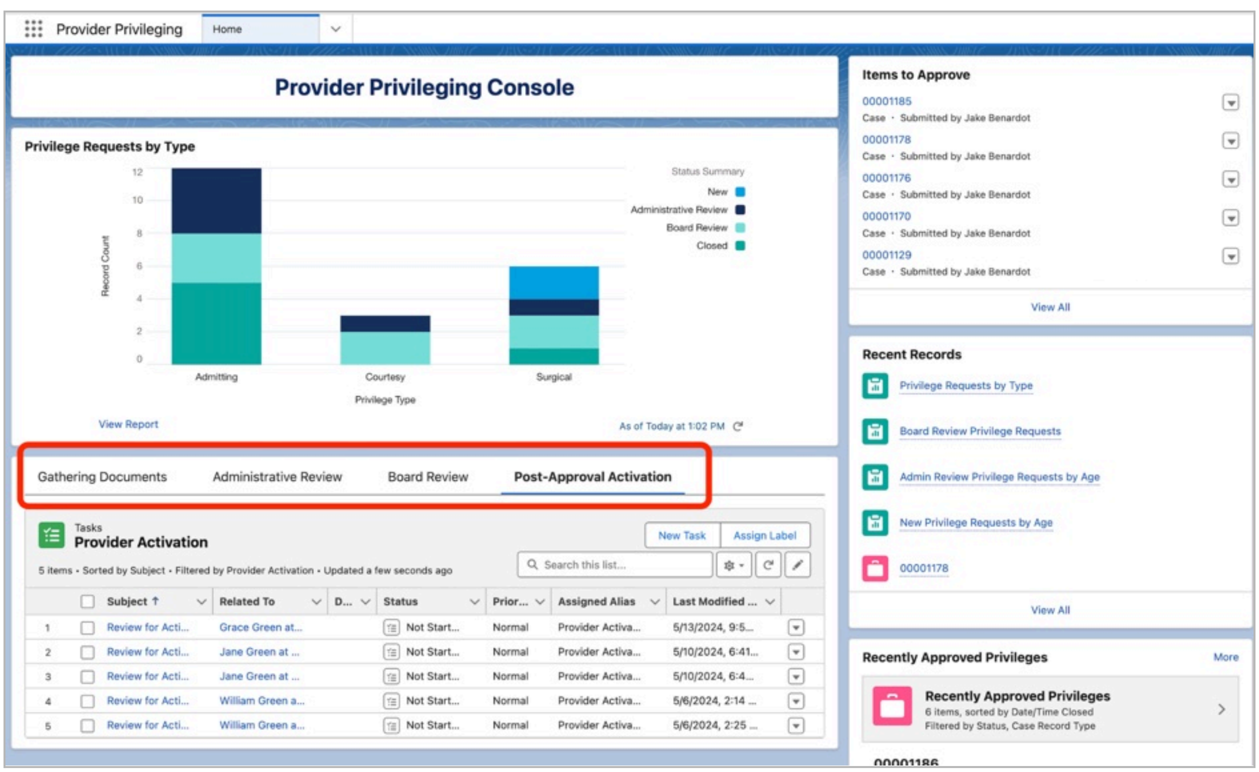
Ensure the Status field of the Document Checklist Items object includes values: New, Pending, Received, Accepted, and Rejected. All values must be Active. Activate any of these items showing as Inactive. Create any of these items that are not initially set up.




## Ensure App Homepage Listviews are Setup

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

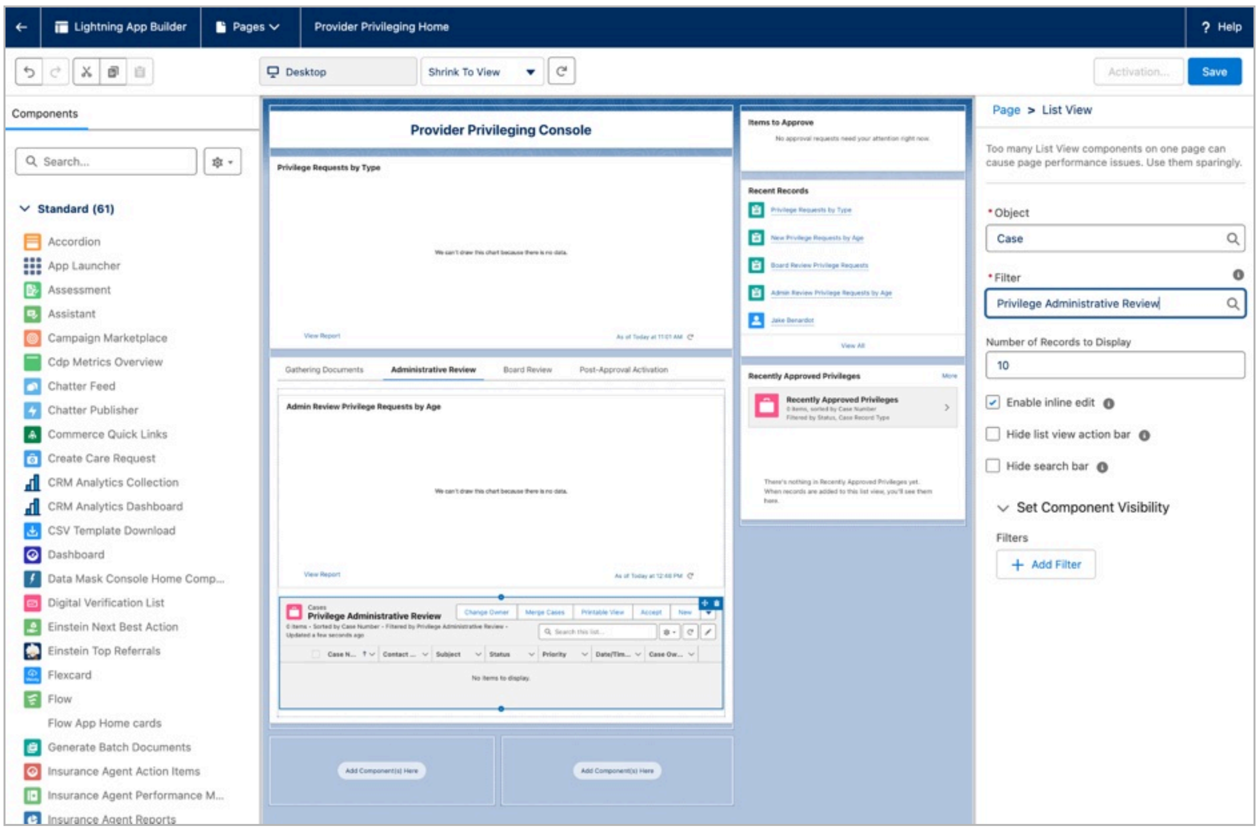
- Gathering Documents
- Administrative Review
- Board Review
- Post-Approval Activation



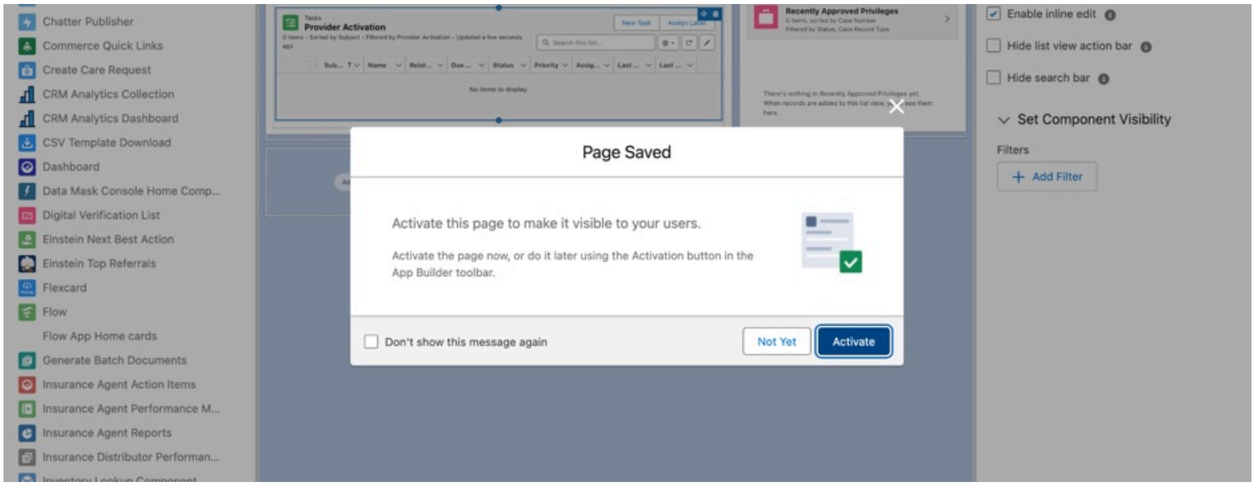
Three of these tabs include list views that are based on Queues which were created earlier in the manual setup steps. Therefore, list views must be updated to properly filter on the queue. Do this by selecting “Edit Page” and updating the List View filters as follows.

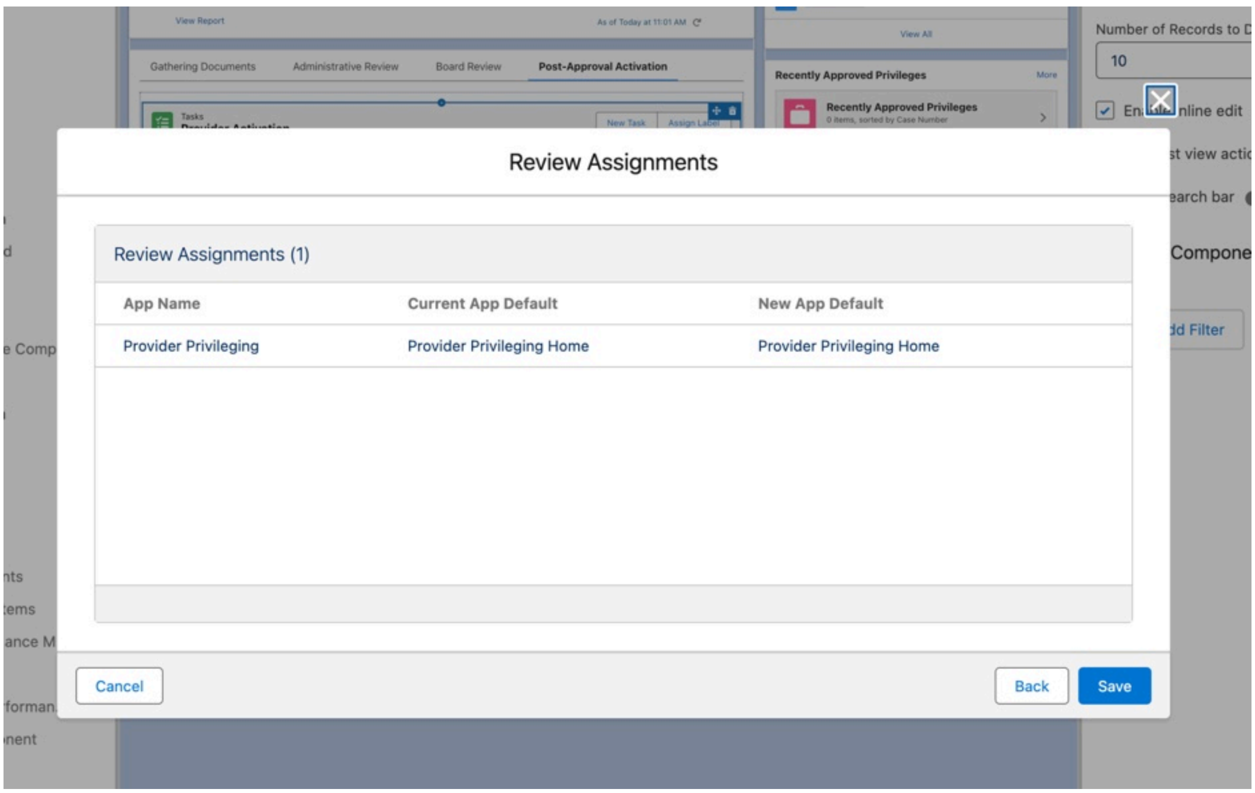
- Administrative Review: Case List View Filter `Privilege Administrative Review`
- Board Review: Case List View Filter `Privilege Board Review`
- Post-Approval Activation: Task List View Filter `Provider Activation`

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.

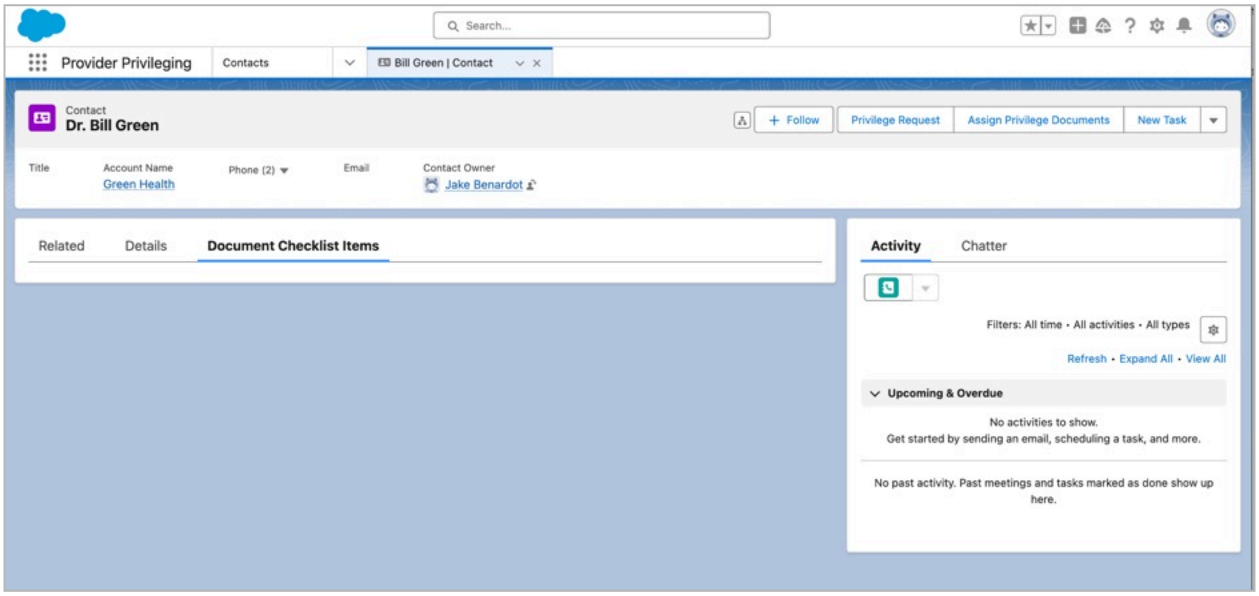

Page Saved
Activate this page to make it visible to your users.
Activate the page now, or do it later using the Activation button in the App Builder toolbar.
Don't show this message again
Not Yet
Activate
Chatter Publisher
Commerce Quick Links
Create Care Request
CRM Analytics Collection
CRM Analytics Dashboard
CSV Template Download
Dashboard
Digital Verification List
Einstein Next Best Action
Einstein Top Referrals
Flexcard
Flow
Flow App Home cards
Generate Batch Documents
Insurance Agent Action Items
Insurance Agent Reports
Enable inline edit
Hide list view action bar
Hide search bar
Set Component Visibility
Filters
Add Filter


Review Assignments
Review Assignments (1)
App Name
Current App Default
New App Default
Provider Privileging
Provider Privileging Home
Provider Privileging Home
Cancel
Back
Save
Gathering Documents
Administrative Review
Board Review
Post-Approval Activation
Recently Approved Privileges
Number of Records to D
10

# Set Up the View of Contacts

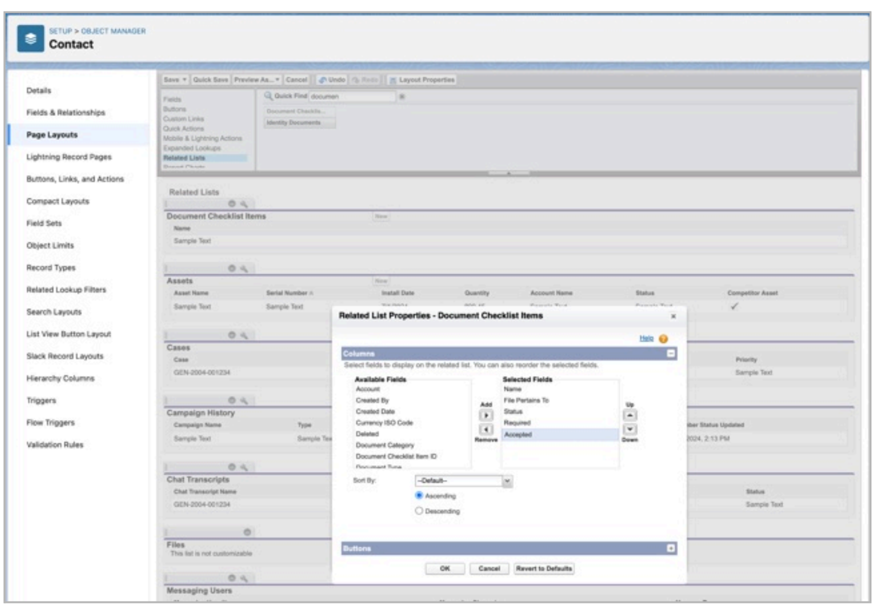
*Using Person Accounts? See [Using Person Account Instead of Contact](#).*

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

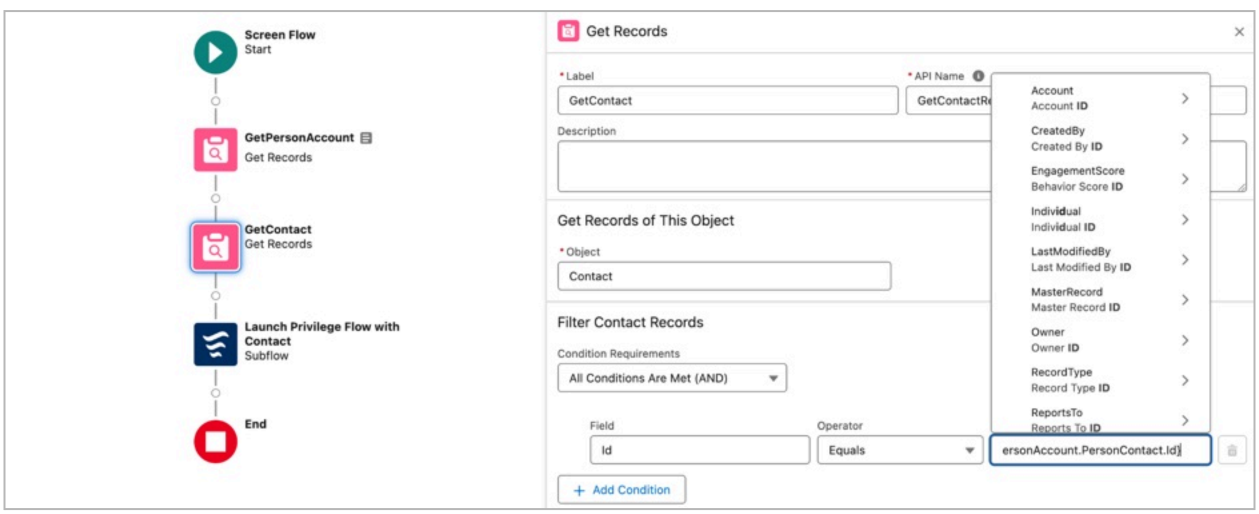
1. Initiating a new Privilege Request.
   Flow Label: **Provider Privilege Request**
   Flow API Name: `Provider_Privilege_Request`

2. Assigning Privilege Documents.
   Flow Label: **Manage Provider Privilege Documents**
   Flow API Name: `Manage_Provider_Privilege_Documents`

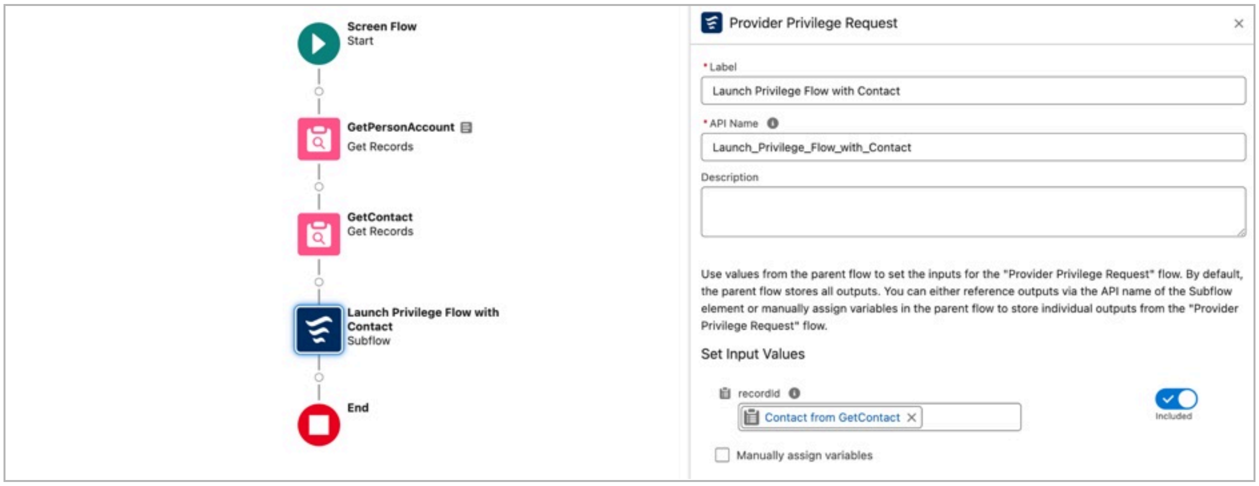
Each of these require that a contact record is passed into the flow.

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.

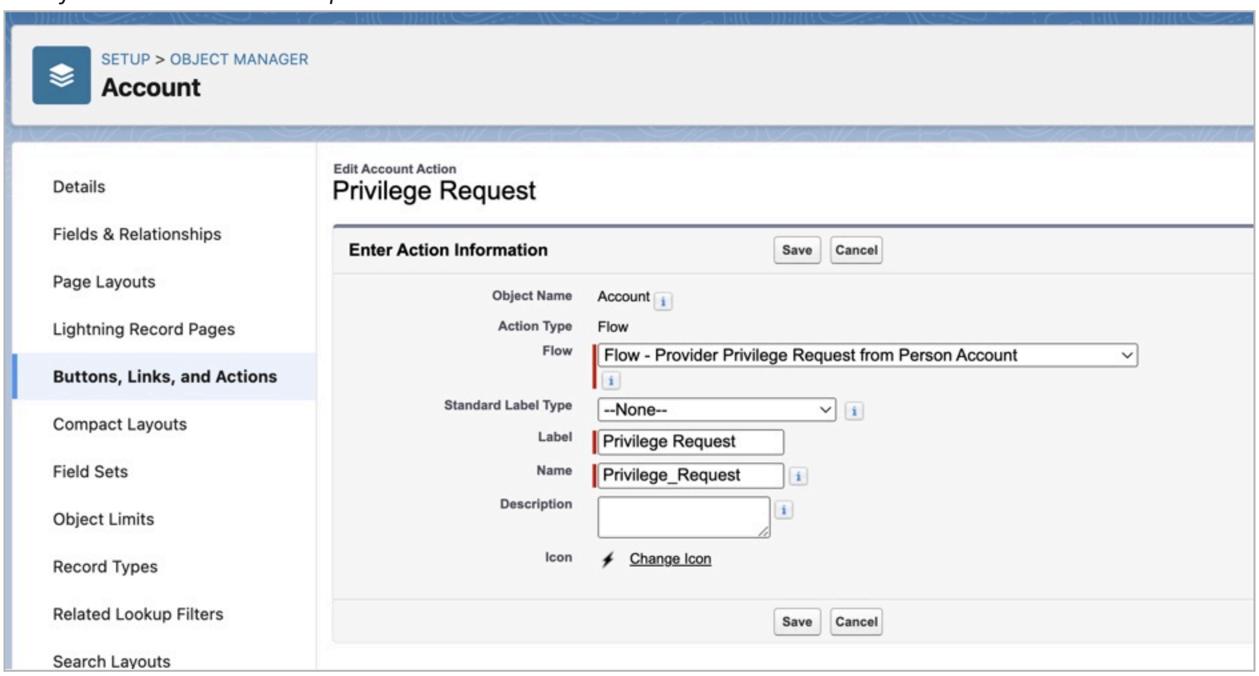
Retrieve the Contact ID from a Person Account via the PersonContact.Id field on the Account.



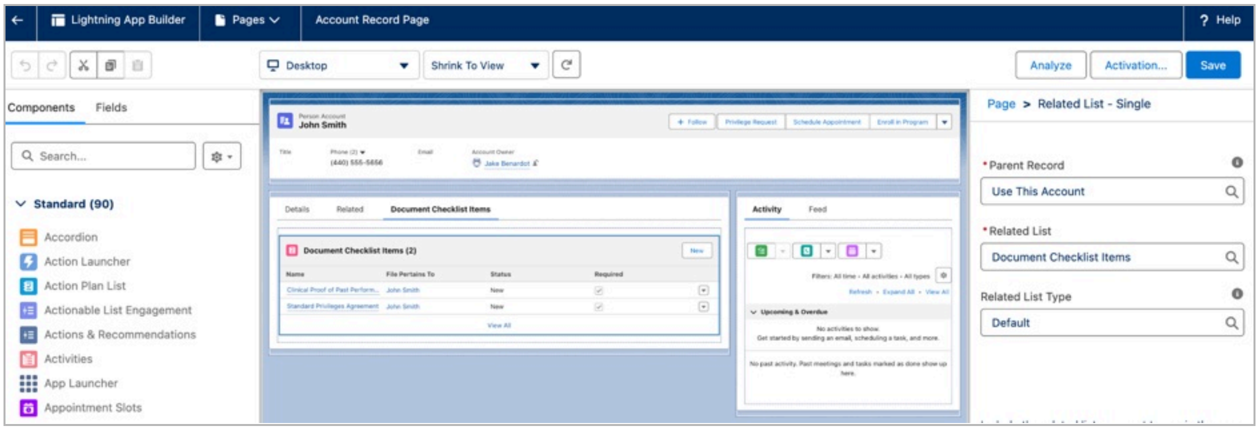

Then call the Provider Privilege Request and/or the Manage Provider Privilege Documents Flow with that value. You must pass in a Record (Single) Variable for the Contact, not a text field of the Contact ID.

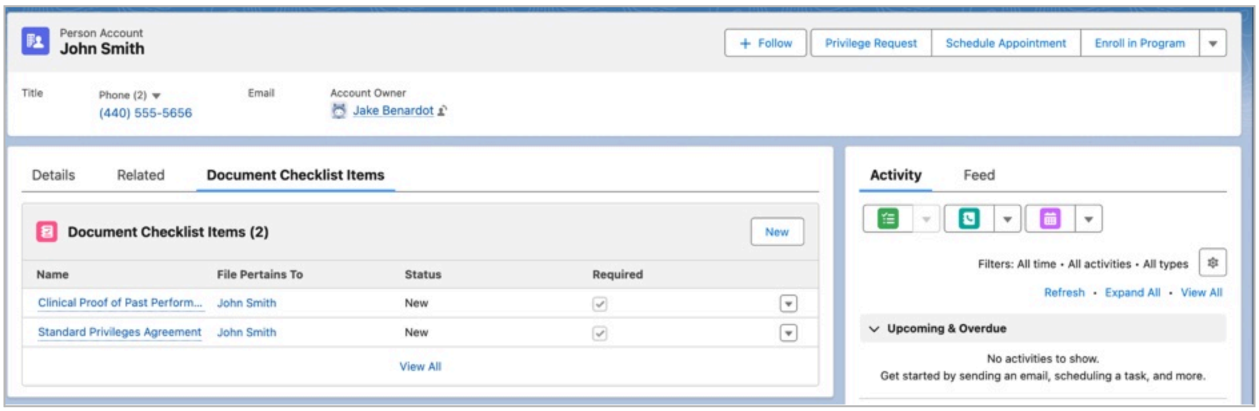



Create Actions that can be added as buttons to the Person Account record page by referencing your newly created Flows. *Example:*




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.

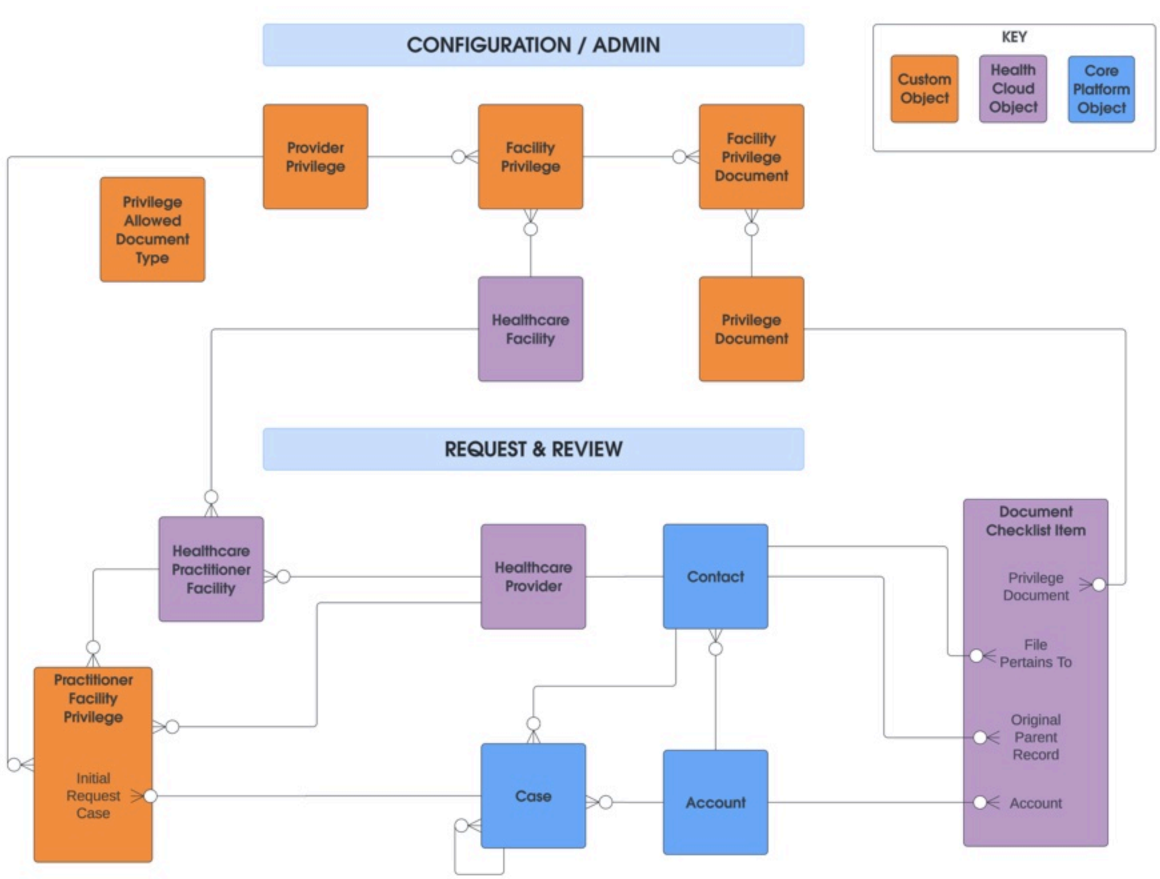
### Adding the Privilege Request to a portal so it can be completed by the practitioner or their representative

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 |