Creating and Managing Provider Accounts

Revised: July 25, 2015

Overview

Your Extended Care server administrator will configure the provider account options that are available for you. If your installation was configured to allow Dedicated authentication of your providers, then the screen you use to create and manage your providers will display an Add button. If your installation was configured to load providers from an external database, then this screen will display an Enable button. If your system was configured to allow both methods, then you will see both buttons. Extended Care calls this Mixed authentication.

Add - Add providers to the system using Dedicated (internal) authentication. This mode of authentication is often used for testing and for rapid setup of special users.

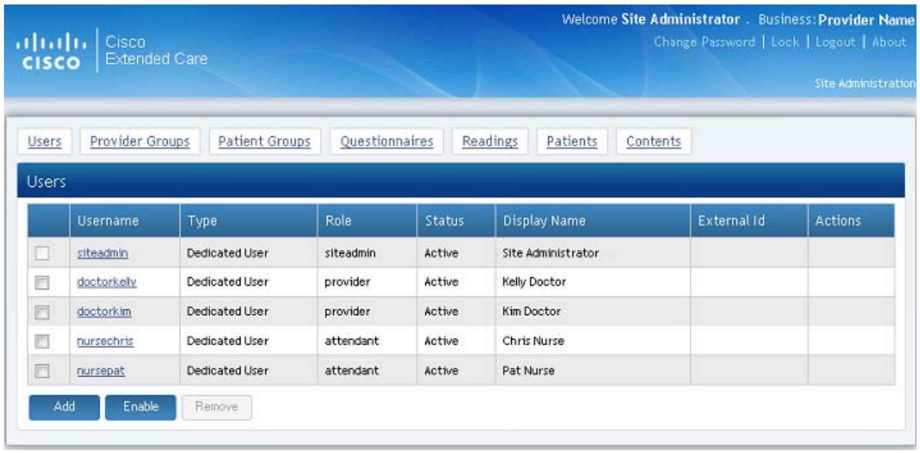
Enable - Enable providers to access the system by loading provider authentication data from an external directory. This mode of authentication is typical of an operational, ongoing system.

Note For more information on Extended Care authentication modes, see Provider Authentication: Including User/Site Administrators, page 2-3.

Figure 6-1 shows the provider create/manage screen the system would display if it were configured for Mixed authentication. Notice that both Add and Enable buttons are available. This is the same screen you see when you first enter the Extended Care system. You may also access the screen at any time by clicking on the Users tab on the administrator task bar.

Note On this screen, the word “Users” actually refers to your care-team providers.

Figure 6-1 Users Screen/Home Screen



ADD and Manage Internally Authenticated Providers

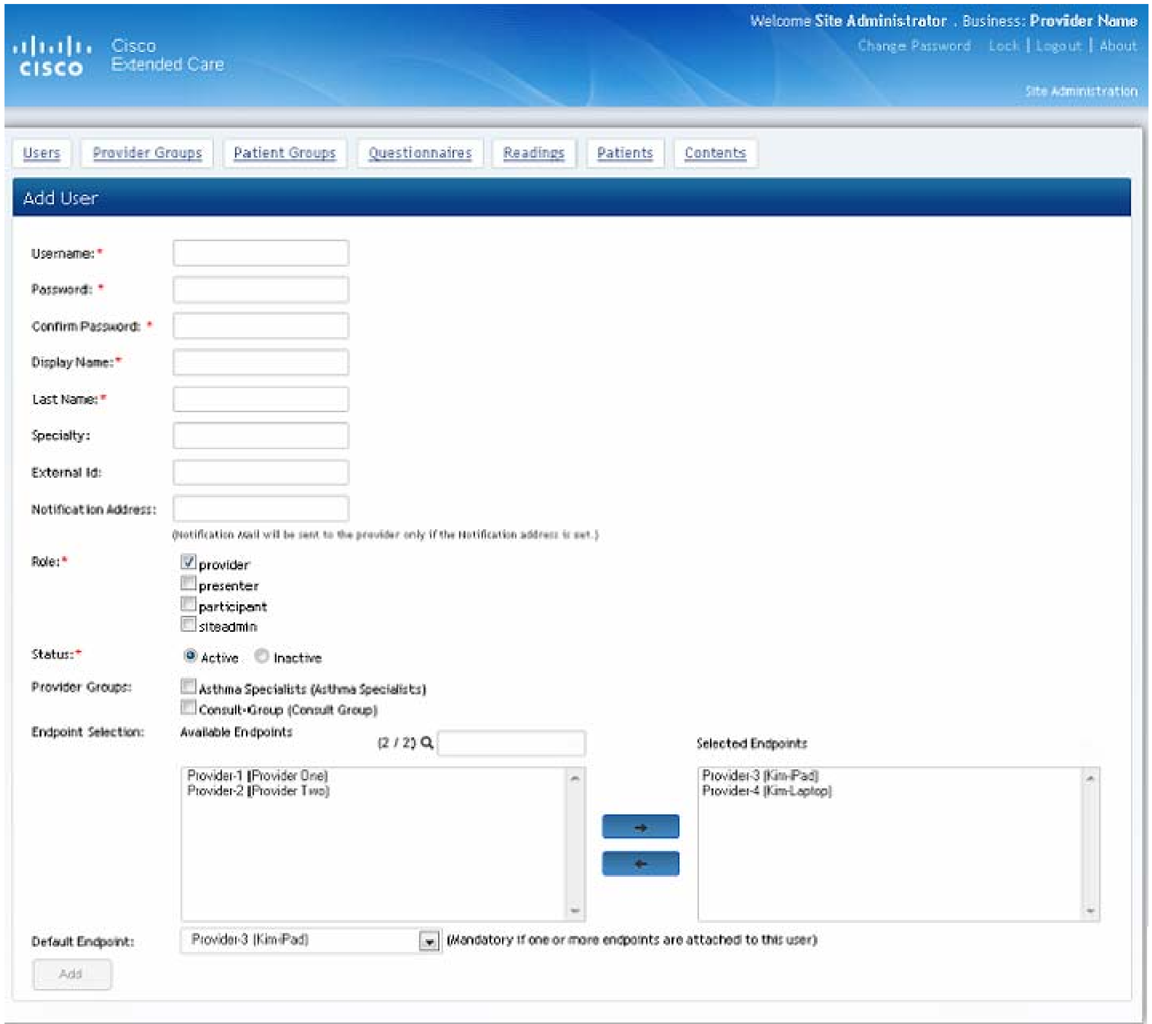
ADD a New Provider Account

Providers can be Added to Extended Care if your installation is configured with either the internal Dedicated authentication mode or with Mixed authentication mode, which includes both Dedicated and External authentication modes. With Mixed authentication providers can either be added or enabled. For more information, see Provider Authentication: Including User/Site Administrators, page 2-3.

Note On the following sample screen, the word ***Users*** actually refers to your care-team providers.

To create a new provider account, click the **Users** tab on the administrator task bar to take you to the Users (providers) screen, as shown in Figure 6-1. From there, click the ADD button to display the Add User (provider) screen, as shown in Figure 6-2**.**

Figure 6-2 Add User (provider) screen



To create a new provider account from this screen, follow these steps.

Step 1 Complete the first five type-in fields as defined in Table 6-1.

Step 2 Click the appropriates check boxes for **Role**, as defined in the table.

Step 3 Click the appropriate radio button to indicate **Active** or **Inactive** status.

Step 4 Click check box(es) for all appropriate **Provider Group**(s).
These check boxes are disabled if the Provider role is not checked.

Step 5 Click an endpoint from the list in the left-hand box and then click the right arrow to move the endpoint to the selected endpoints list. Repeat the endpoint selection if you have more than one endpoint configured for your provider.

Step 6 Click the **Default Endpoint** drop down list and choose the default endpoint.

Step 7 When you have finished, click **Add**.

Table 6-1 Table Field Descriptions for Add User Screens

Field	Guidelines
Username*	This name, in combination with the password, provides the care-team member with access to the Extended Care sample portals for installations using either Dedicated authentication or Mixed authentication modes. Once entered by the user/site administrator, the username may not be changed. * This field is mandatory. Manually enter a name that complies with the following conventions: • Maximum 30 characters. • Characters may include letters, numbers, hyphens, and underscores. (case-sensitive).
Password*	The user/site administrator creates a temporary password to grant the new care-team member access to the system. Upon first access to the system, the new user should change their password to one of their own preference. * This field is mandatory. Manually enter a name that complies with the following conventions: • Maximum 30 characters. • Any characters, numerals, special characters, and any other keyboard characters are allowed. (case-sensitive).
Confirm Password*	You are required to retype the password that you assigned to the new user. * This field is mandatory.
Display Name*	This name is displayed in the participant window of each appointment. When entering the Display Name, keep in mind that this name will be visible to all appointment participants. * This field is mandatory. Manually enter a name that complies with the following conventions: • Maximum 30 characters. • Any characters, numerals, special characters, and any other keyboard characters are allowed. (not case-sensitive).
Last Name*	Enter the last name here. * This field is mandatory.
Specialty	This is the physician's special focus of practice. While this is not a required field, the patient may want to know this information, so this field, while not required, should be completed.
External Id	This field refers to the ID an external directory uses to identify the provider. It is used for information purposes only. If you wish to record the ID from the external directory, type it in here.

Table 6-1 Table Field Descriptions for Add User Screens (continued)

Field	Guidelines
Notification Address	Enter the provider's email address to automatically send the provider an email under the following conditions: • When a scheduled patient s in the waiting room waiting to be seen by this specific provider. • When a Quick Start unscheduled patient is in the waiting room waiting to be seen and the provider is on call for that Patient Group. While this field always displays, it is only functional if the Extended Care server administrator configured your installation for email notification. A note on this screen alerts you to that fact.
Role*	Any or all combinations of the following roles can be assigned to a provider. Provider: • Able to respond to patient appointments (both ready appointments and unscheduled Quick Start appointments). • Able to perform patient searches. Presenter: • Able to initiate a Presenter/Participant Conference. • Need not be a provider. Could serve in any capacity, including educator, business analyst, and so on. • This option is only active if your installation has been configured for multi-party conferencing. If it has not, been configured, then the field will still display but will have no affect on the system. Participant: • Able to participate in a Presenter/Participant Conference. • Need not be a provider. Could serve in any capacity, including educator, business analyst, and so on. • This option is only active if your installation has been configured for multi-party conferencing. If it has not, been configured, then the field will still display but will have no affect on the system. Siteadmin: • Able to perform all the actions described in this guide. * This field is mandatory.
Status*	You can assign a status of Active or Inactive to any account. For example, if you want to create a number of user accounts for later use, you can make them inactive until they are needed. Or, if you have training user accounts or other types of temporary user accounts, you can make them inactive when they are not needed, and active when they are needed. * This field is mandatory.
Provider Groups*	Select the desired Provider Group or groups. * This field is mandatory.

Table 6-1 Table Field Descriptions for Add User Screens (continued)

Field	Guidelines
Endpoint Selection	If endpoints have been configured for your installation, they will be available in a drop-down list. Select as many endpoints as are applicable to the provider. Providers will not share their personal endpoints but they may share endpoints in shared offices or other shared locations. This field is NOT mandatory.
Default Endpoint	If one or more endpoints are configured for the provider, then it is mandatory to select a default endpoint from the drop-down list.

Update a Dedicated Provider Account

To update a Dedicated provider account, click the **Users** tab on the administrator task bar to take you to the Users (providers) screen, as shown in Figure 6-1.

Step 1 On the Users screen, click the name of the user that you want to update.
The application displays the Update User screen.

Step 2 Make the required changes. For guidelines on any fields, refer to Table 6-1.

Step 3 When you have finished, click the **Update** button at the bottom of the screen.

Unlock a Provider Account

If a provider account is locked due to account inactivity or because of failed login attempts, the provider's name in the Users window will be displayed in italics, the Status column will show Locked, and there will be an Unlock action available in the Action column.

Note This option is only available if the provider account is authenticated against the Dedicated Extended Care database. Extended Care cannot lock a provider account that is authenticated against an external directory.

To unlock a provider account, click the **Users** tab on the administrator task bar to take you to the Users (providers) screen, as shown in Figure 6-1.

Step 1 Find the provider whose account is locked (name in italics).

Step 2 Click **Unlock** in the Actions column on the right (Figure 6-3).

Step 3 Click **Yes** in the Confirmation dialog box.

Figure 6-3 Unlock User Account

Delete a Provider Account

To delete a provider account, click the **Users** tab on the administrator task bar to take you to the Users (providers) screen, as shown in Figure 6-1.

Step 1 On the Users screen, find the name of the user that you want to delete.

Step 2 Click the **Remove** button at the bottom of the screen.

Step 3 When the Remove dialog box displays, click **Yes**.

ENABLE and Manage Externally Authenticated Providers

ENABLE a New Provider Account

Providers can be Enabled to Extended Care if your installation is configured with either External authentication mode or with Mixed authentication mode, which includes both Dedicated and External authentication modes. With Mixed authentication, providers can either be added or enabled. External Care supports external authentication using two directory types, LDAP and non-LDAP connector. It uses the same screen for both types. For more information, see Provider Authentication: Including User/Site Administrators, page 2-3.

Note On the following sample screen, the word Users actually refers to your care-team providers.

To create a new provider account, click the **Users** tab on the administrator task bar to take you to the Users (providers) screen, as shown in Figure 6-1. From there, click the **Enable** button to display the Enable User (provider) screen, as shown in Figure 6-4.

Step 1 Complete the first four type-in fields as defined in Table 6-2.

Step 2 Click the appropriates check boxes for **Role**, as defined in the table.

Step 3 Click the appropriate radio button to indicate **Active** or **Inactive** status.

Step 4 Click check box(es) for all appropriate **Provider Group**(s).
These options are dimmed if the provider role is not checked.

Step 5 Click an endpoint from the list in the left-hand box and then click the right arrow to move the endpoint to the selected endpoints list. Repeat the endpoint selection if you have more than one endpoint configured for your provider.

Step 6 Click the **Default Endpoint** drop down list and choose the default endpoint.

Step 7 When you have finished, click **Enable**.

Figure 6-4 Enable User (provider) screen

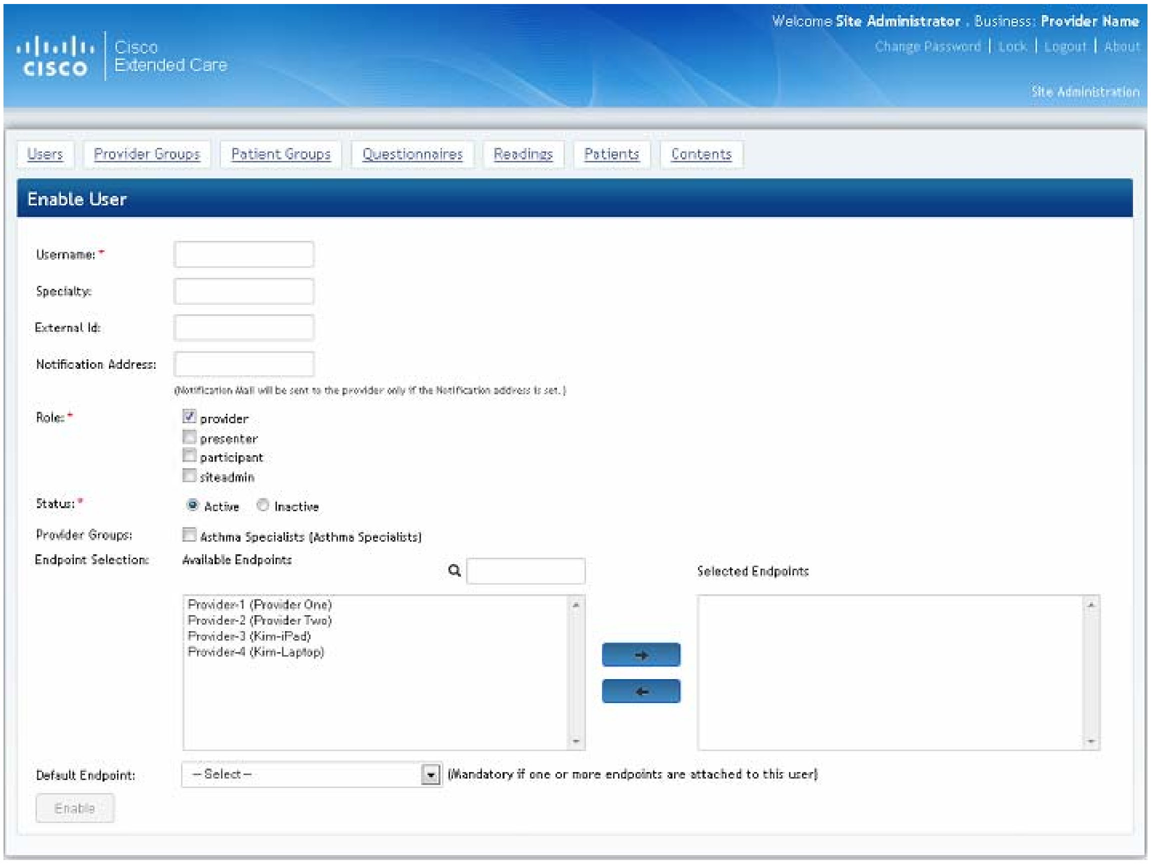


Table 6-2 Table Field Descriptions for Enable User Screens (External LDAP and External Connector/non-LDAP)

Field	Guidelines
Username*	This field is used to identify and synchronize the care-team member with the external directory your organization uses to manage your users. In advance, you will need to obtain that user name from your organization. Be sure to type in the user name exactly as it appears in the external directory. This user name will serve as the log-in user name to access the Extended Care sample portals. The associated password the provider uses with the external directory will also serve as the password to access the sample portals. * This field is mandatory. **Note** This name will also be used in the Extended Care participant window for each appointment attended by the provider.
Specialty	This is the physician's special focus of practice. While this is not a required field, the patient may want to know this information, so this field, while not required, should be completed.

Table 6-2 Table Field Descriptions for Enable User Screens (External LDAP and External Connector/non-LDAP) (continued)

Field	Guidelines
Last Name*	Enter the last name here. * This field is mandatory.
External Id	This field refers to the ID an external directory uses to identify the provider. It currently does not perform any synchronization action, and is used for information purposes only.
Notification Address	Enter the provider's email address to automatically send the provider an email under the following conditions: • When a scheduled patient s in the waiting room waiting to be seen by this specific provider. • When a Quick Start unscheduled patient is in the waiting room waiting to be seen and the provider is on call for that Patient Group. While this field always displays, it is only functional if the Extended Care server administrator configured your installation for email notification. A note on this screen alerts you to that fact.
Role*	Any or all combinations of the following roles can be assigned to a provider. Provider: • Able to respond to patient appointments (both ready appointments and unscheduled Quick Start appointments). • Able to perform patient searches. Presenter: • Able to initiate a Presenter/Participant Conference. • Need not be a provider. Could serve in any capacity, including educator, business analyst, and so on. • This option is only active if your installation has been configured for multi-party conferencing. If it has not been configured, then the field will still display but will have no affect on the system. Participant: • Able to participate in a Presenter/Participant Conference. • Need not be a provider. Could serve in any capacity, including educator, business analyst, and so on. • This option is only active if your installation has been configured for multi-party conferencing. If it has not been configured, then the field will still display but will have no affect on the system. Siteadmin: • Able to perform all the actions described in this guide. * This field is mandatory.

Table 6-2 Table Field Descriptions for Enable User Screens (External LDAP and External Connector/non-LDAP) (continued)

Field	Guidelines
Status*	You can assign a status of Active or Inactive to any account. For example, if you want to create a number of user accounts for later use, you can make them inactive until they are needed. Or, if you have training user accounts or other types of temporary user accounts, you can make them inactive when they are not needed, and active when they are needed. * This field is mandatory.
Provider Groups*	Select the desired Provider Group or groups. * This field is mandatory.
Endpoint Selection	If endpoints have been configured for your installation, they will be available in a drop-down list. Select as many endpoints as are applicable to the provider. Providers will not share their personal endpoints but they may share endpoints in shared offices or other shared locations. This field is NOT mandatory.
Default Endpoint	If one or more endpoints are configured for the provider, then it is mandatory to select a default endpoint from the drop-down list.

Update a Provider Account

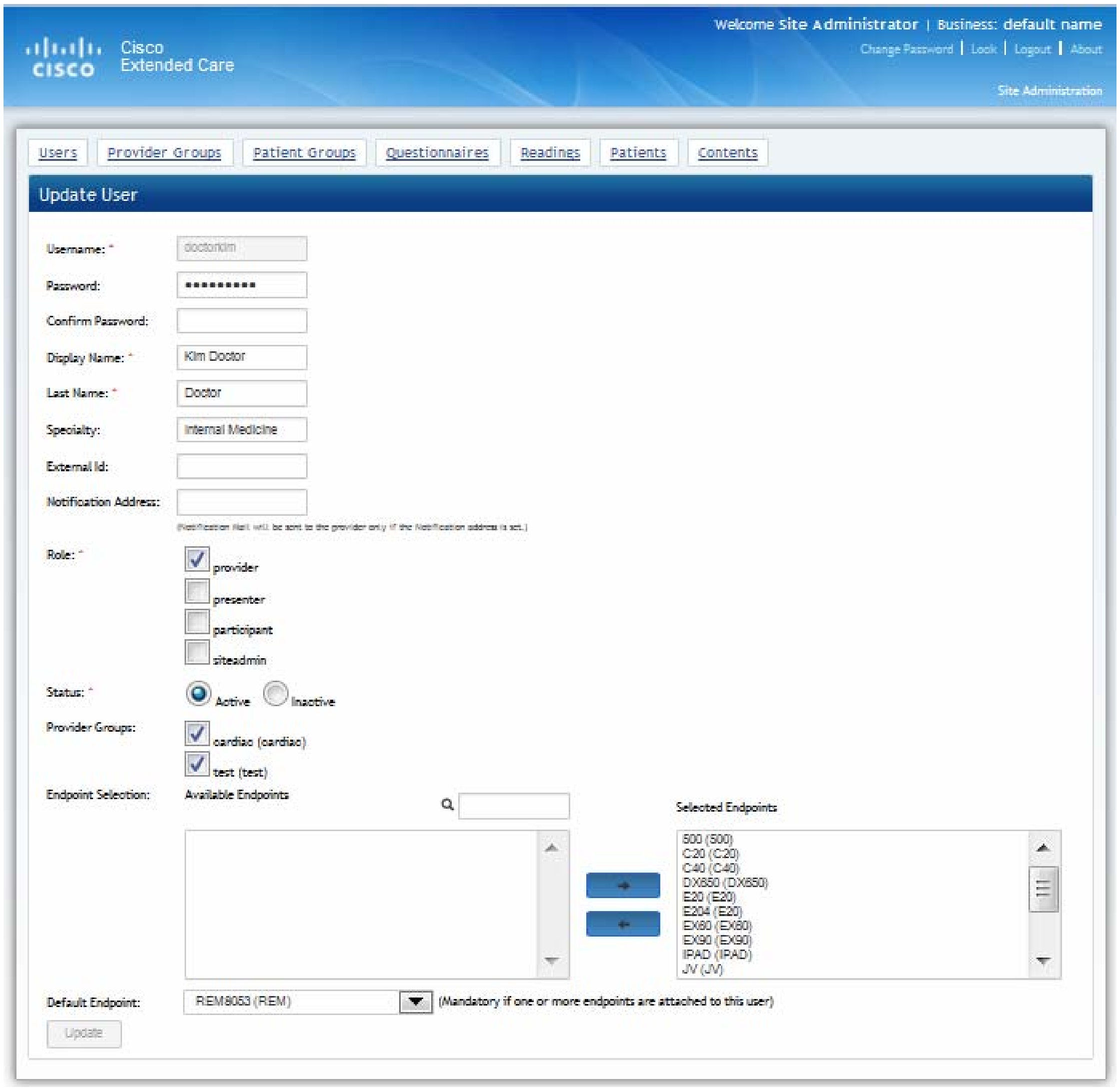
To update a provider account, click the **Users** tab on the administrator task bar to take you to the Users (providers) screen, as shown in Figure 6-1.

Step 1 On the Users screen, click the name of the user that you want to update.
The application displays the Update User screen shown in Figure 6-5).

Step 2 Make the required changes. For guidelines on any fields, refer to Table 6-2.

Step 3 When you have finished, click the **Update** button at the bottom of the screen.

Figure 6-5 Update User (provider) screen for External Authentication



Delete a Provider Account

To delete a provider account, click the **Users** tab on the administrator task bar to take you to the Users (providers) screen, as shown in Figure 6-1.

Step 1 On the Users screen, find the name of the user that you want to delete.

Step 2 Click the **Remove** button at the bottom of the screen.

Step 3 When the Remove dialog box displays, click **Yes**.

Managing On-Call Schedules for Video-Appointments

Extended Care's provider on-call schedules are organized by Provider Group so that patients requesting Quick Connect unscheduled appointments will be directed to an appropriate pool of available providers. When a patient tries to make a Quick-Connect appointment, a notification goes out to all providers scheduled at that time.

It is assumed that your provider schedules are created and managed from an external appointment management system maintained by or for your organization. The Extended Care sample portal provided with your installation is not currently designed to load those schedules into the appropriate Provider Groups within Extended Care. Therefore, it is essential that you manually schedule your provider on-call schedules into Extended Care; otherwise, patients have no unscheduled access to your care team. For details on this process, see Managing On-Call Schedules for Video-Appointments, page 8-5.