



Patient Groups, Provider Groups, and On-Call Scheduling

Revised: July 25, 2015

Overview

Provider Groups and Patient Groups provide your organization with a versatile way to organize providers and patients and then to assign patients to providers accordingly.

The Extended Care sample portal provided with your installation does not provide a way to automatically load Provider Groups or Patient Groups from any sources your organization may use for managing your provider and patient data. Therefore, you will need to manually create Provider Groups and Patient Groups and also assign members to those groups. The following Extended Care rules apply.

- Each Patient Group must be assigned to a Provider Group.
Therefore, a Patient Group cannot be created until you have created a Provider Group.
- Patient Groups can only be assigned to **one** Provider Group.
- Patients can only be assigned to one Patient Group.
- Providers can be assigned to multiple Provider Groups.



Note

The Extended Care middleware tools provide a way for application developers to create patient and Provider Groups and to exchange that data with other applications. This could be used to develop a means to download patient and Provider Groups from some resource your organization uses for managing providers and patients. For more information, see the “User Onboarding API” discussed in the *Developer Guide for Extended Care 1.1*.

Provider Groups

General Guidelines

If your site is using Provider Groups, you can do one of the following:

- Add Provider Groups and then add or enable the Providers. In this case, as you add or enable a Provider, you check the Provider Group(s) to which this Provider will be assigned. This may be the easier approach if you have a short list of Provider Groups but a large number of Providers.
- Add Providers and then add a Provider Group. In this case, when you add the Provider Groups, you will check all the Providers that you want assigned to this Provider Group. This is useful if you are upgrading from a prior release and your Providers are already added or enabled.

Provider Group Naming Considerations

Provider Group names can be up to thirty characters long and can include letters, numbers, dashes, and underscores. Provider Group names are not case sensitive; however, the application will not allow you to use two names that differ only in that one is capitalized and one is not.

Consider the following criteria when naming your Provider Groups.

- **Specialty:** The names might indicate a provider specialty, such as cardiology, diabetes, etc..
- **Practice or Location:** You might choose to use Provider Group names to enable you to request Providers in a specific physical location or practice, in which case the location or practice should be included in the Provider Group name.
- **Language:** You may want a language-based queue, so that patients can be seen by a Provider who speaks their native language. The Provider Group name should clearly list the language.
- **On Call:** To minimize the time it takes for drop-ins to be seen and/or to maximize Provider productivity, you may want a single “on-call” Provider Group that includes all the general practitioners who are available to take ad hoc appointments,

Adding Provider Groups

To add Provider Groups, do the following:

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- Step 1** Click the **Provider Groups** tab on the administrator task bar. The Provider Groups screen displays, as shown in [Figure 8-1](#).

Figure 8-1 Provider Groups screen



Step 2 Click **Add**. The Add Provider Group screen displays as shown in Figure 8-2

Figure 8-2 Add Provider Group screen

Step 3 Enter the Provider Group name and Description. If your providers are already configured in Extended Care, their names will display. Check the box next to every provider you want in this Provider Group.

Step 4 To complete the new Provider Group, click **Add**.

Updating Provider Groups

To update a Provider Group, do the following:

- Step 1** Click **Provider Group** tab on the administrator task bar. The *Provider Groups* screen displays as shown in [Figure 8-1](#).
- Step 2** Click the name of the existing Provider Group you wish to update. The *Update Provider Group* screen displays as shown in [Figure 8-3](#).

Figure 8-3 Update Provider Group screen

The screenshot shows the 'Update Provider Group' screen. At the top, there is a header with the Cisco logo and 'Cisco Extended Care'. On the right, it says 'Welcome Site Administrator', 'Business: Provider Name', and links for 'Change Password', 'Lock', 'Logout', and 'About'. Below the header is a navigation bar with tabs: 'Users', 'Provider Groups', 'Patient Groups', 'Questionnaires', 'Readings', 'Patients', and 'Contents'. The main content area is titled 'Update Provider Group' and contains the following form elements:

- Name:** A text input field containing 'Asthma Specialists'.
- Description:** A text input field containing 'Asthma Specialists'.
- Providers:** A list of providers with checkboxes. 'Kelly Doctor' and 'Kim Doctor' are both checked.
- Update:** A button at the bottom of the form.

- Step 3** Check providers to add them to the Provider Group. Un-check providers to delete them from the Provider Group.
- Step 4** To complete the transaction, click **Update**.

Deleting Provider Groups

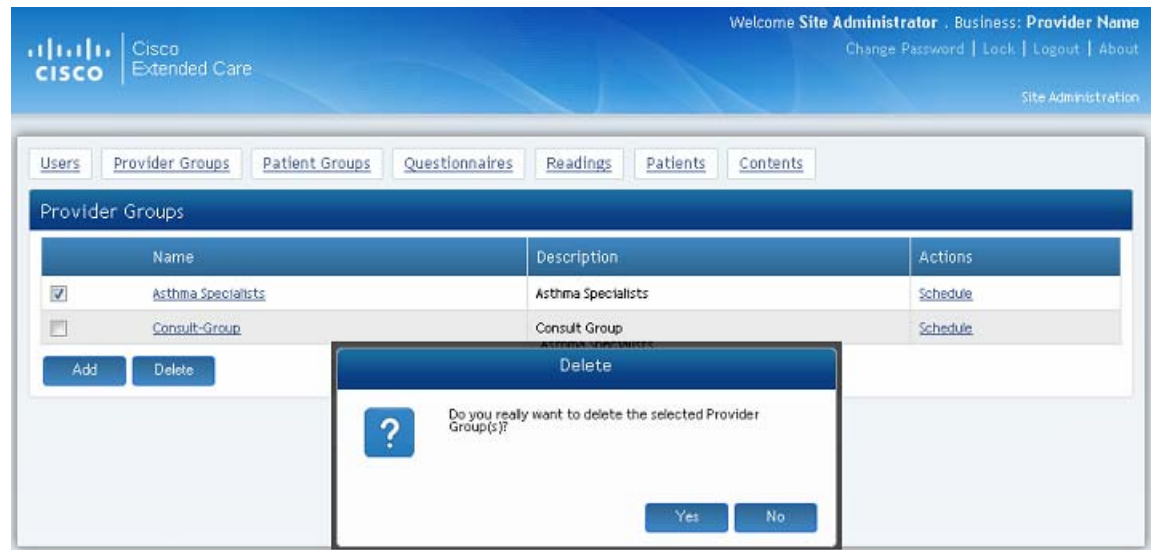


Note Deleting a Provider Group does not delete the providers.

To delete a Provider Group, do the following:

- Step 1** Click **Provider Groups** tab on the administrator task bar. The *Provider Groups* Window displays as shown in [Figure 8-1](#).
- Step 2** Select the checkbox next to an existing Provider Group and click **Delete**. The Delete Provider Group screen displays as show in [Figure 8-4](#)

Figure 8-4 Delete Provider Group screen



Step 3 When asked for confirmation, click **Yes**.

Managing On-Call Schedules for Video-Appointments

Extended Care's provider on-call schedules are organized by Provider Group; however, when a patient tries to make a Quick-Connect appointment, a notification of the patient's appointment request 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.



Note

The Extended Care middleware tools provide a way to integrate any Extended Care solution with the provider on-call schedules you already create for your healthcare organization. This would require the custom design of a data connector. For more information, including possible design resources, contact your Cisco representative.

Provider on-call scheduling is a two-step process.

1. First you need to schedule your providers on-call schedules in your organization's provider scheduler.
2. Then manually enter each provider's on-call schedule into Extended Care.



Note

If a provider belongs to more than one Provider Group be sure to enter their schedules in each.

Follow the directions here to schedule providers in a specific Provider Group.

Creating a Provider's On-Call Schedule

- Step 1** Click on the **Provider Groups** tab on the administrator task bar. The *Provider Groups* screen displays as shown in [Figure 8-5](#)

Figure 8-5 *Provider Group Schedule Link*



- Step 2** In the *Provider Groups* screen, find the relevant Provider Group for your provider and click the **Schedule** link in the Actions Column.
- Step 3** When the Provider Group Schedule screen displays, click **Add Schedule**, as shown in [Figure 8-6](#).

Figure 8-6 Provider Group Schedule screen

The screenshot displays the 'Provider Group Schedule' interface. At the top, the Cisco Extended Care logo is visible on the left, and the user is logged in as 'Site Administrator' for 'Business: Provider Name'. Navigation tabs include 'Users', 'Provider Groups', 'Patient Groups', 'Questionnaires', 'Readings', 'Patients', and 'Contents'. The main section is titled 'Provider Group Schedule' and shows a calendar for 'Sep 1 - 7 2013'. The calendar grid has columns for each day from Sunday to Saturday and rows for time slots from 'All Day' to '3:00 pm'. The Thursday column (09/05) is highlighted in yellow. Below the calendar, there is a note: 'Please ensure that your system time is in sync with the server' and three buttons: 'Add Schedule', 'Update Schedule', and 'Delete Schedule'.

Step 4 When the Add Schedule window displays on top of the Provider Groups Schedule screen, select your provider and set up their on-call schedule, as shown in [Figure 8-7](#).

Scheduling options for the Add Schedule window are described in [Table 8-1](#).

Figure 8-7 Provider Group Schedule screen

Table 8-1 “Add Schedule Window” Options

Recurring Pattern	Scheduling Options
Note	When your Extended Care sample portal is installed, standard working hours for a default work day are established for your installation. These standard hours may be applied using the All Day Event check box. For organizations with multiple facilities and locations, the default work day can be assigned to a particular location (tenant) or may be configured to apply to all locations in the organization. For more information, consult your Server Administrators or other IT personnel in your organization.

Table 8-1 “Add Schedule Window” Options (continued)

Recurring Pattern	Scheduling Options
Once	<p>Start Date: Select the one day you wish to schedule.</p> <p>All Day Event: Check this box if you want to defer to the default work day hours assigned to your location. <i>Do not check any other boxes.</i> Simply click OK to complete the scheduling.</p> <p>Start Time and End Time: If you want to schedule outside default working hours, use these two options. <i>Do not check any other boxes.</i> Simply click OK to complete the scheduling.</p>
Recurring	<p>Week Day Check boxes: Check the boxes that apply.</p> <p>All Day Event: Check this box if you want to defer to the default work day hours assigned to your location. <i>Do not check any other boxes.</i> Simply click OK to complete the scheduling.</p> <p>Start Time and Schedule Duration: If you want to schedule outside default working hours, use these two options. First select your start time. Then use the Scheduled Duration option to specify how many hours are available from Start Time. <i>Do not check any other boxes.</i> Simply click OK to complete the scheduling.</p>

Step 5 When you’ve made all your Add Schedule window selections, click **OK** to finalize the schedule.

Updating or Deleting a Provider’s On-Call Schedule

- Step 1** To update or delete a schedule, click on the **Provider Groups** tab on the administrator task bar. The *Provider Groups* Window displays as shown in [Figure 8-5](#).
- Step 2** In the *Provider Groups* Window, find the relevant Provider Group for your provider and click the **Schedule** link in the Actions Column.
- Step 3** When the Provider Group Schedule screen displays, click **Update Schedule** or **Delete Schedule**, as shown in [Figure 8-6](#).
- Step 4** When the Update Schedule window or the Delete Schedule window displays, use the appropriate buttons to update or delete the schedule as needed.

Patient Groups

General Guidelines



Note

Each Patient Group must be assigned to a Provider Group. Therefore, a Patient Group cannot be created until you have created a Provider Group.

If your site is using Patient Groups, you can do one of the following:

- Add Patient Groups and then add or enable the Patients. In this case, as you add or enable a Patient, you check the Patient Group(s) to which this Patient will be assigned. This may be the easier approach if you have a short list of Patient Groups but a large number of Patients.
- Add Patients and then add Patient Group. In this case, when you add the Patient Groups, you will check all the Patients that you want assigned to this Patients Group. This is useful if you are upgrading from a prior release and your Patients are already added or enabled.

Patient Group Naming Considerations

Patient Group names can be up to thirty characters long and can include letters, numbers, dashes, and underscores. Patient Group names are not case sensitive; however, the application will not allow you to use two names that differ only in that one is capitalized and one is not.

Consider the following criteria when naming your Provider Groups.

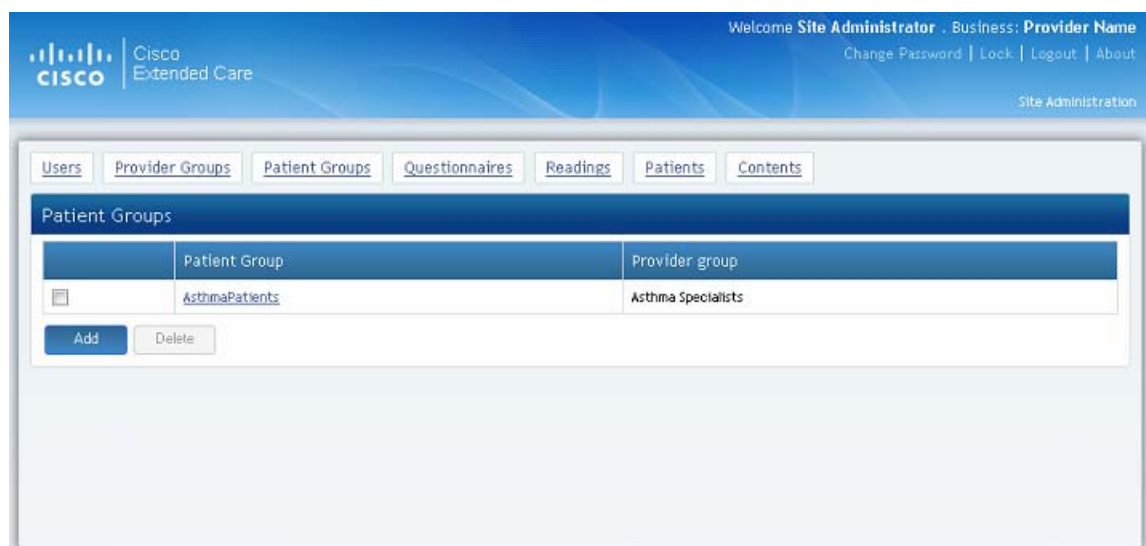
- **Speciality:** If you are assigning patients according to the provider's specialty, then the Patient Group name could indicate the corresponding specialty group.
- **Geographic Location:** Larger organizations may have facilities scattered across the globe. If you are assigning patients by time zone, then the Patient Group name could indicate the geographic location.

Adding Patient Groups

To add Patient Groups, do the following:

- Step 1** Click the **Patient Groups** tab on the administrator task bar. The Patient Groups screen displays, as shown in [Figure 8-8](#).

Figure 8-8 Patient Groups screen



- Step 2** Click **Add**. The Add Patient Group screen displays, as shown in [Figure 8-9](#).

Figure 8-9 Add Patient Group screen

Welcome Site Administrator . Business: Provider Name
Change Password | Lock | Logout | About
Site Administration

Users | Provider Groups | Patient Groups | Questionnaires | Readings | Patients | Contents

Add Patient Group

Patient Group:

Provider group:

Add

- Step 3** Enter a Patient Group name after considering the guidelines described in [Patient Group Naming Considerations](#).
- Step 4** From the Provider Group drop-down box, select the appropriate Provider Group.
- Step 5** To complete the new Patient Group, click **Add**.
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Updating Patient Groups

To update a Patient Group, do the following:

- Step 1** Click **Patients Group** tab on the administrator task bar. The Patient Groups screen displays.
- Step 2** Click the name of the Patient Group you wish to update. The *Update Patient Group* screen displays, as shown in [Figure 8-10](#).

Figure 8-10 Update Patient Group screen

Step 3 Select a Provider Group to which this Patient Group will be assigned.

Step 4 Click **Update**.

Deleting Patient Groups



Note

Deleting a Provider Group or Patient Group does not delete the patients.

To delete a Patient Group, do the following:

Step 1 Click **Patient Groups** tab on the administrator task bar. The Patient Groups screen displays.

Step 2 Select the check box next to the Patient Group and click **Delete**.

Step 3 When the Delete Patient Group window displays and asks for confirmation, click **Yes**.