



Creating and Managing Patient Accounts

Revised: July 25, 2015

Overview

Your Extended Care server administrator will configure your sample portals to authenticate patients by loading their authentication data from an external directory.



Note For more information on Extended Care authentication modes, see [Patients, page 2-2](#).

ENABLE and Manage Externally Authenticated Patients

Enable a New Patient Account

To enable a new patient account, click the **Patients** tab on the administrator task bar to take you to the Patients screen, as shown in [Figure 7-1](#).

Figure 7-1 "Patients" screen

	Patient Id	Patient Group	Username	First Name	Last Name	Actions
<input type="checkbox"/>	2222	AsthmaPatients	janedoe	Jane	Doe	
<input type="checkbox"/>	1111	AsthmaPatients	johndoe	John	Doe	

From there, click the **Enable** button to display the Enable Patient screen, as shown in Figure 7-2.

Figure 7-2 "Enable Patient" screen

To enable a new patient from this screen:

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- Step 1** Complete the **Patient ID** field as defined in Table 7-1..

- Step 2** After entering the patient ID, click the **Retrieve** link. The next three fields will auto-fill from the external directory.
- Step 3** Complete the next three fields as defined in the table.
- Step 4** Select the correct **Endpoint** that was created for the Patient user.
- Step 5** Assign the correct Patient Group that was created for the Patient user.
- Step 6** When you have finished, click **Enable**.

Table 7-1 Table Field Descriptions for "Enable Patient" Screen


Field	Guidelines
Patient ID*	This field is used to identify and synchronize the patient with the external directory your organization uses to manage your patients. In advance, you will need to obtain the external directory patient ID from your organization. Be sure to type in the patient name exactly as it appears in the external directory. * This field is mandatory.
First Name	This field is grayed out because it is automatically filled in by the external directory
Middle Name	This field is grayed out because it is automatically filled in by the external directory
Last Name*	This field is grayed out because it is automatically filled in by the external directory.
Patient Username*	This name, in combination with the password, provides the patient with access to the Extended Care sample portals. Once entered by the user/site administrator, the username may not be changed. Note that while you may match this name with the patient's name in the external directory, this name acts completely independently from the directory name. * This field is mandatory. Manually enter a name that complies with the following conventions: <ul style="list-style-type: none"> • Maximum 30 characters. • Characters may include letters, numbers, hyphens, and underscores. (case-sensitive).  Note This name will also be used in the Extended Care participant window for each appointment attended by the patient.
Password*	Like the Patient Username, this password is independent from any password set by the patient in the external directory. Upon first access to the system, the new user should change their password to one of their own preference. Manually enter a name that complies with the following conventions: <ul style="list-style-type: none"> • Maximum 30 characters. • Any characters, numerals, special characters, and any other keyboard characters are allowed. (case-sensitive).

Table 7-1 Table Field Descriptions for “Enable Patient” Screen (continued)

Field	Guidelines
Confirm Password*	Retype the password that you created. * This field is mandatory
Endpoint*	* This field is mandatory.
Patient Group*	All patients must be assigned to one, and only one, Patient Group. * This field is mandatory.

Update a Patient Account

To update a patient account, click the **Patients** tab on the administrator task bar to take you to the Patients screen, as shown in [Figure 7-1](#). To update a specific patient account, do the following:

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- Step 1** Click the name of the patient that you want to update.
The application displays the Update Patient screen.
 - Step 2** Make the required changes. For guidelines on any fields, refer to [Table 7-1](#).
 - Step 3** When you have finished, click the **Update** button at the bottom of the screen.
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Unlock a Patient Account

If a patient account is locked due to account inactivity or because of failed login attempts, the patient’s name in the Patients screen will be displayed in italics and there will be an Unlock action available in the Actions column.



Note

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

To unlock a patient account, click the **Patients** tab on the administrator task bar to take you to the Patients screen, as shown in [Figure 7-1](#).

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- Step 1** Find the patient whose account is locked (name in italics).
 - Step 2** Click **Unlock** in the Actions column on the right ([Figure 7-3](#)).
 - Step 3** Click **Yes** in the Confirmation dialog box.
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Figure 7-3 Unlock Patient Account screen sample

The screenshot shows the 'Enable Patient' screen within the 'Site Administration' portal. At the top, there are navigation tabs: Users, Provider Groups, Patient Groups, Questionnaires, Readings, Patients, and Contents. The main content area is titled 'Enable Patient' and contains the following form fields:

- Patient Id: * (text input) with a 'Retrieve' link to its right.
- First Name: (text input)
- Middle Name: (text input)
- Last Name: (text input)
- Patient Username: * (text input)
- Password: * (text input)
- Confirm Password: * (text input)
- Endpoint: * (dropdown menu)
- Patient Group: * (dropdown menu)

Disable a Patient Account

To delete a patient account, click the **Users** tab on the administrator task bar to take you to the Patients screen, as shown in [Figure 7-1](#).

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- Step 1** On the Patients screen, find the name of the patient that you want to delete.
 - Step 2** Click the **Disable** button at the bottom of the screen.
 - Step 3** When the Disable dialog box displays, click **Yes**.
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Managing Patient Appointment Schedules

It is assumed that your patients' appointment schedules are created and managed from an external appointment management system maintained by or for your organization. You will need to use that system for creating and managing Extended Care video appointments as well, since the sample portal provided with your installation is not currently designed to load patient schedules into Extended Care.



Note

The Extended Care middleware tools provide a way to integrate any Extended Care solution with the appointment 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.

