



Washington DC Healthcare and Life Sciences

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Healthcare and Life Sciences

Leverage your digital healthcare platform with the ServiceNow® Healthcare and Life Sciences products and create better end-to-end experiences for patients, providers, and staff.



Discover how digital transformation can redefine healthcare experiences and outcomes without compromising on security or compliance

Improve experiences for your healthcare or life sciences organization and find efficiencies in your core processes by adding configurable, pre-built Healthcare and Life Sciences workflows on top of your existing systems. Then, build the apps and digital workflows you need to support future business and care models with little coding required. Finally, unite it all on one agile, interoperable platform with a single Healthcare and Life Sciences data model. The Healthcare and Life Sciences data model is compliant with the Health Insurance Portability and Accountability Act (HIPAA) and aligned to the Health Level Seven International (HL7) industry standard including the Fast Healthcare Interoperability Resources (FHIR) standard.

[View and download the full infocard](#)  for a highlight of Healthcare and Life Sciences features.

Healthcare and Life Sciences features

| | |
|---|--|
|  | Drive digital transformation by using automated and intelligent workflows Use foundational capabilities within the Healthcare and Life Sciences Service Management applications built on the Now Platform to extend the existing data model to support providers, payers, and life sciences organizations. |
|  | Reduce operational risks and improve digital engagement Efficiently complete documentation for a seamless experience. Create and view consent policies and forms. Send forms to patients, clinicians, or vendors to be signed online. Determine and manage packages of documents based on rules and triggers. |

Healthcare and Life Sciences features (continued)

| | |
|--|--|
| | <p>Improve productivity of patient and care teams</p> <p>Provide a guided experience to patient and care teams with playbooks, case management, and automated processes.</p> |
| | <p>Meet the challenges of global disruption in healthcare</p> <p>Manage COVID-19 and seasonal influenza immunization at scale.</p> |
| | <p>Optimize clinician time in delivering patient care</p> <p>Create better outcomes for patients by effectively connecting and managing your organization's patient and care teams, workflows, and electronic medical record (EMR) system.</p> |
| | <p>Enable healthcare Integrations and Interoperability</p> <p>Leverage API integrations enabled with Redox FHIR HL7 to integrate and interoperate with EMR systems or any other healthcare systems.</p> |

Drive digital transformation by using automated and intelligent workflows



Enable your organization to deliver healthier outcomes with a single platform. Use foundational capabilities within the Healthcare and Life Sciences Service Management applications built on the Now Platform including an HL7 FHIR data model, consent management, patient 360-degree view, patient portal, and pre-configured workflows. The platform also includes App Engine that allows organizations to expand on existing workflows or create new workflows to meet the unique needs of their organization.

Reduce operational risks and improve digital engagement

The screenshot shows a ServiceNow interface for a 'To-dos' item. The top navigation bar includes 'SOLANA', 'Requests', 'Todos 5', and a user profile icon. The main content area displays a task titled 'HIPAA Compliance patient consent'. Key details shown include:

- Number:** HCTASK009875
- Created:** 3mo ago
- Updated:** 21h ago
- State:** In review

Below the task details, the 'HIPAA Compliance patient consent' form is displayed. It includes:

- Case:** CS0067474
- Urgency:** 2 - Medium
- Due date:** 2021-09-09

The form has tabs for 'Details' (selected) and 'Activity'. Below the tabs is a toolbar with icons for print, download, search, and navigation. The main content area contains the following text:

HIPAA Compliance Patient Consent Form

Our Notice of Privacy Practices provides information about how we may use or disclose protected health information.

The notice contains a patient's rights section describing your rights under the law. You ascertain that by your signature that you have reviewed our notice before signing this consent.

The terms of the notice may change, if so, you will be notified at your next visit to update your signature/date.

At the bottom, there are buttons for 'Print name' (disabled), 'Draw sign' (selected), and a handwritten signature. A note states: "This constitutes your electronic signature and has the same legal impact as signing a printed version of this document." A 'Submit' button is also present.

Enable patients to sign consent forms online. Provide intelligent service triage across various platforms and channels including mobile, text, chat, and voice. Move work and information to impacted teams for better speed, visibility, and prioritization.

Improve productivity of patient and care teams

Enable healthcare service teams to streamline workflows with playbooks, automated tasks, dashboards, and case management.

Meet the challenges of global disruption in healthcare

Enable organizations to manage vaccines from the factory to the front line with speed, scale, and flexibility. Accelerate the immunization process by delivering sample content and workflows to manage vaccinations. Healthcare and Life Sciences products provide workflows for users, healthcare providers, and clinicians to manage vaccinations for infectious diseases including COVID-19

Optimize clinician time in delivering patient care

The screenshot shows the ServiceNow EMR interface. On the left is a sidebar with various clinical and administrative links. The main area displays a list of recent patient visits for a specific patient, with columns for date, visit type, and provider.

Enable clinicians to make service requests directly from their EMR system with the click of a button. Requests are routed automatically and tagged so that clinicians can easily track their progress. This automatic routing enables the healthcare IT teams to resolve issues more quickly. Everyone involved can see the status of requests at a single location, eliminating the need for back-and-forth communication of email messages or calls.

Enable healthcare Integrations and Interoperability



Enable bidirectional integrations between multiple healthcare systems to improve care capacity. Healthcare data from external healthcare systems are received and updated into a ServiceNow instance with the use of the Redox Inbound Integration application. The application easily integrates scheduling, medication, and patient administration information without depending on how individual healthcare systems store and transmit healthcare data.

Get started

- Watch Healthcare and Life Sciences demos on [Demo Center](#).
- Work with an implementation specialist to streamline your setup process. To learn more, see the [Customer Success Center](#).

- Sign up for the [Healthcare and Life Sciences Service Management for Implementers](#) learning path to learn about the implementation process.
- View the configuration section for each Healthcare and Life Sciences application. For example, see [Configuring Healthcare and Life Sciences Service Management Core](#).

Products and applications

-
- [EMR Help](#)
-
- [Healthcare and Life Sciences Service Management](#)
-
- [Healthcare and Life Sciences Service Management Core](#)
- [Patient Support Services](#)
- [Pre-Visit Management](#)
- [Redox Inbound Integration](#)
- [Vaccine Administration Management](#)

Healthcare and Life Sciences Service Management

With the ServiceNow® Healthcare and Life Sciences Service Management applications, streamline the patient and care team workflows with playbooks and case management.

Healthcare and Life Sciences Service Management includes the following applications:

[Healthcare and Life Sciences Service Management Core](#)

Deliver a seamless digital experience for your users and streamline healthcare operations with automated processes.

[Pre-Visit Management](#)

Streamline the scheduling process of procedure requests for patients and increase visibility to pre-authorization approvals prior to scheduled procedures.

[Patient Support Services](#)

Streamline the patient onboarding, education, and engagement for various patient support services such as discount plans, adherence programs, opioid, and diabetes management.

[Vaccine Administration Management](#)

Manage vaccinations for infectious diseases from start to finish.

[Redox Inbound Integration](#)

Use the real-time bidirectional data exchange with external healthcare systems via the Redox platform.

Healthcare and Life Sciences Service Management Core

With the ServiceNow® Healthcare and Life Sciences Service Management Core application, deliver a seamless digital experience for your users and streamline healthcare operations with automated processes.

Request apps on the Store

Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#).

| | | |
|--|--|--|
| <p>Explore</p>  <p>Learn about how healthcare organizations use Healthcare and Life Sciences Service Management Core.</p> | <p>Configure</p>  <p>Plan and configure your implementation.</p> | <p>Set up</p>  <p>Configure the Workspace for your healthcare agents.</p> |
| <p>Manage</p>  <p>Manage patient information in Workspace.</p> | <p>Patient Portal</p>  <p>Use the Patient Portal to make healthcare information available to patients.</p> | <p>Reference</p>  <p>Get details about components including tables.</p> |

Exploring Healthcare and Life Sciences Service Management Core

Whether you're starting or expanding the implementation of the Healthcare and Life Sciences Service Management Core application, consider learning more about the data model and digital health capabilities including patient 360-degree view, consent management, and digital documentation available to address healthcare services.

Overview

As a provider, payer, pharmaceutical, or medical device organization, you can improve employee productivity with complete visibility into the medical records of patients and members. You can optimize your healthcare agent time by providing them the complete patient information to address any healthcare requests.

Healthcare and Life Sciences Service Management Core is a scoped application that provides the Healthcare and Life Sciences data model for Healthcare and Life Sciences industry products, Workspace for viewing patient information and healthcare-related cases, and document templates for managing healthcare-related documents.

Benefits

Healthcare and Life Sciences Service Management Core provides the following benefits:

Healthcare and Life Sciences Service Management Core benefits

| Benefit | Key feature | Role |
|--|---|---------------|
| Experience a seamless and time-saving patient appointment process. | Using the Patient Portal for Healthcare and Life Sciences Service Management | Patient |
| Get a 360-degree view of patient or member information. | Viewing patient information in Workspace | Agent |
| Digitize the generation of healthcare documents and consents by using built-in digital document templates. | Configuring document templates for Healthcare and Life Sciences Service Management Core | Agent |
| Configure a flexible role-based and security data model that is compliant with the Health Insurance Portability and Accountability Act (HIPAA) and aligned to the Health Level Seven International (HL7) industry standard including the Fast Healthcare Interoperability Resources (FHIR) standard. | Healthcare and Life Sciences data model | Administrator |
| Manage healthcare cases in a convenient and accessible space. | Managing healthcare-related requests in Workspace | Agent |

To get started with the Healthcare and Life Sciences Service Management Core application, see [Configuring Healthcare and Life Sciences Service Management Core](#).

Configuring Healthcare and Life Sciences Service Management Core

Set up the Healthcare and Life Sciences Service Management Core application to create different types of workflow for Healthcare and Life Sciences industry solutions.

Healthcare and Life Sciences Service Management Core configuration tasks

| Task | Description |
|---|---|
| Install Healthcare and Life Sciences Service Management Core. | Install the Healthcare and Life Sciences Service Management Core application to create a data model and enable digital documentation and consent management for a Healthcare and Life Sciences workflow. |
| Assign roles for Healthcare and Life Sciences Service Management Core users. | Assign roles to control access to features, capabilities, and data in the Healthcare and Life Sciences Service Management Core application. |
| Use the Healthcare and Life Sciences data model. | <p>Use healthcare data, case, and task tables to decide the data model for your Healthcare and Life Sciences workflows. For information about healthcare data tables, see Healthcare and Life Sciences data model tables.</p> <p>i Note: No users, including users with the admin role, can delete data from the healthcare data tables.</p> |
| Configure document templates for healthcare cases. | Digitize the generation of healthcare documents and forms by using in-built digital document templates. |
| Configure the auto-generation of documents for healthcare cases. | Define the conditions for auto-generating documents for a healthcare case. |
| Approve restricted caller access privileges. | Approve restricted caller access (RCA) privileges for accessing document templates from the Healthcare and Life Sciences Service Management applications. |
| Configure a program and the program services. | Enable the users of a Healthcare and Life Sciences Service Management application to request for the services included within a program. |
| Configure dosage specifications for a medication product. | Reduce manual errors by configuring dosage specifications for a medication product associated with a program in a application. For example, enrollment programs in the Patient Support Services . |
| Specify a to-do item for patients. | Add a to-do item that patients in your healthcare organization must complete as part of their healthcare activity. |
| Configure the service portal to add a to-dos menu item for completing healthcare-related tasks. | Enable the to-dos menu item that uses the HCLS to dos (hcls-to-do-list) widget for displaying to-do items on a service portal. |

Healthcare and Life Sciences Service Management Core configuration tasks (continued)

| Task | Description |
|--|---|
| Determine the consent management process for patients. | Determine whether the privacy policy for patient consent needs to be routed for review and signature to the patient. |
| Configure the Patient Portal. | Set up the Patient Portal available within the Healthcare and Life Sciences Service Management Core application to enable patients to access their healthcare information from the portal. |
| Configure the Healthcare and Life Sciences Service Management Core email notifications. | Configure the Healthcare and Life Sciences Service Management Core email notifications sent to patients about account registration with the Patient Portal. |
| Enable B2B2C in Healthcare and Life Sciences Service Management Core. | Configure the Customer Service Management (CSM) data models to enable business-to-business-to-consumer (B2B2C). |
| Configure an external Redox healthcare system as a source system for a custom integration. | Enable a custom integration application to exchange data with an external Redox healthcare system by configuring the source and destination IDs of the healthcare system in your ServiceNow instance. |
| Secure sensitive information. | Prevent unauthorized users from viewing sensitive healthcare data. |

Install Healthcare and Life Sciences Service Management Core

You can install the Healthcare and Life Sciences Service Management Core application (sn_hcls) if you have the admin role. The application includes demo data Healthcare and Life Sciences Service Management Core and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).

Role required: admin

About this task

The following items are installed with Healthcare and Life Sciences Service Management Core:

- Roles
- Tables

- Plugins
- ServiceNow Store applications
- Business rules

For more information, see [Components installed with Healthcare and Life Sciences Service Management Core](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Healthcare and Life Sciences Service Management Core application (sn_hcls) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

Visit the [ServiceNow Store](#)  website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#) .

3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. Select **Install**.

Assign roles for Healthcare and Life Sciences Service Management Core users

Assign roles to control access to features, capabilities, and data in the Healthcare and Life Sciences Service Management Core application.

Before you begin

Set the application scope to Healthcare and Life Sciences Service Management Core using the application picker. For more information, see [Application picker](#) .

Role required: sn_hcls.manager or admin

About this task

Users with the roles listed in the following table can use the Healthcare and Life Sciences Service Management Core application.

Healthcare and Life Sciences Service Management Core roles

| Role | Description | Contains roles |
|--------------------------|--|--|
| sn_hcls.admin | Administers who can access sensitive data by restricting how users acquire roles in the Healthcare and Life Sciences applications. | <ul style="list-style-type: none"> • decision_table_admin • sn_doc.admin • sn_hcls.manager • sn_previsit.admin |
| sn_hcls.case_task_viewer | Grants access to view tasks associated with healthcare cases. | None |

Healthcare and Life Sciences Service Management Core roles (continued)

| Role | Description | Contains roles |
|-------------------------------|---|--|
| sn_hcls.case_viewer | Grants access to view healthcare cases. | None |
| sn_hcls.clinical_data_viewer | Views details of the clinical data such as immunization and procedure. | None |
| sn_hcls.clinical_data_writer | Edits details of the clinical data such as immunization and procedure. | sn_hcls.clinical_data_viewer |
| sn_hcls.consumer_agent | Creates, views, and edits healthcare cases and works with consumers to resolve cases. | <ul style="list-style-type: none"> • sn_hcls.healthcare_agent • sn_customerservice.consumer_agent |
| sn_hcls.customerservice_agent | Creates healthcare cases for an account and contact as a customer service agent. | <ul style="list-style-type: none"> • sn_hcls.healthcare_agent • sn_customerservice_agent |
| sn_hcls.data_access_user | Grants data access rights to the users who need dedicated access to certain sensitive healthcare data. | <ul style="list-style-type: none"> • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.health_insurance_data_viewer • sn_hcls.revenue_cycle_data_viewer |
| sn_hcls.device_data_viewer | Views details of the device. | None |
| sn_hcls.device_data_writer | Creates, deletes, and updates the device data. | sn_hcls.device_data_viewer |
| sn_hcls.employee_patient | Grants access to the users with the snc_internal role to healthcare data and healthcare cases when authorized to view them. | <ul style="list-style-type: none"> • sn_customerservice.self_contributor • sn_vaccine_sm.user • sn_hcls.data_access_user |

Healthcare and Life Sciences Service Management Core roles (continued)

| Role | Description | Contains roles |
|--------------------------------------|--|--|
| sn_hcls.foundation_data_viewer | Views details of the foundation data such as organization and healthcare location. | None |
| sn_hcls.foundation_data_writer | Edits details of the foundation data such as organization and healthcare location. | sn_hcls.foundation_data_viewer |
| sn_hcls.healthcare_agent | Accesses and views healthcare data related to patients as a contact center agent. | <ul style="list-style-type: none"> • canvas_user • sn_customerservice.csm_workspace_u • sn_customerservice.customer_data_v • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.health_insurance_data_view • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.report_viewer • sn_hcls.revenue_cycle_data_viewer |
| sn_hcls.health_insurance_data_viewer | Views details of the health insurance data such as member plan and payer plan. | None |
| sn_hcls.health_insurance_data_writer | Edits details of the health insurance data such as member plan and payer plan. | health_insurance_data_viewer |
| sn_hcls.manager | Manages who can perform create, read, update, and delete (CRUD) operations on healthcare objects within a ServiceNow instance. In addition, creates and manages accounts, contact, account relationships, contact relationships, | <ul style="list-style-type: none"> • canvas_user • model_manager • sn_customerservice.csm_workspace_u • sn_customerservice.customer_data_v • sn_hcls.clinical_data_writer • sn_hcls.foundation_data_writer • sn_hcls.health_insurance_data_writer • sn_hcls.patient_data_writer |

Healthcare and Life Sciences Service Management Core roles (continued)

| Role | Description | Contains roles |
|-----------------------------|--|---|
| | and account consumer relationships. | <ul style="list-style-type: none"> • sn_hcls.practitioner_data_writer • sn_hcls.report_viewer • sn_hcls.revenue_cycle_data_writer • sn_previsit.patient_service_agent |
| sn_hcls.patient | <p>Views own records including healthcare cases, addresses, patient data, and clinical data as a patient. Also, views the records of other patients including their addresses for whom they are the authorized representative. Adds comments to their healthcare cases and for whom they are the authorized representative. Views their household members, if any.</p> <p>Household members and addresses associated with a patient are maintained by using the Household Member [csm_household_member] and Location [cmn_location] tables, respectively. For more information about household members and their relationships, see Industry data model households. Location is associated with the foundation domain in the Common Service Data Model (CSDM).</p> | <ul style="list-style-type: none"> • sn_customerservice.consumer • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.health_insurance_data_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.revenue_cycle_data_viewer |
| sn_hcls.patient_data_viewer | Views details of the patient data such as patient and policy consent. | None |

Healthcare and Life Sciences Service Management Core roles (continued)

| Role | Description | Contains roles |
|-----------------------------------|---|--|
| sn_hcls.patient_data_writer | Edits details of the patient data such as patient and policy consent. | sn_hcls.patient_data_viewer |
| sn_hcls.practitioner | Accesses and views healthcare data related to patients as a healthcare practitioner (a triage nurse or clinical coordinator). | <ul style="list-style-type: none"> • sn_customerservice.customer_data_viewer • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.health_insurance_data_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.report_viewer • sn_hcls.revenue_cycle_data_viewer |
| sn_hcls.practitioner_data_viewer | Views details of the practitioner data such as practitioner and practitioner facility. | None |
| sn_hcls.practitioner_data_writer | Edits details of the practitioner data such as practitioner and practitioner facility. | sn_hcls.practitioner_data_viewer |
| sn_hcls.report_viewer | Views reports generated from tables for which they have access as agents or managers. | None |
| sn_hcls.revenue_cycle_data_viewer | Views details of the revenue cycle data such as claims. | None |
| sn_hcls.revenue_cycle_data_writer | Edits details of the revenue cycle data such as claims. | sn_hcls.revenue_cycle_data_viewer |

Procedure

Assign roles to users and groups using the Now Platform user administration feature.

- To assign a role to a user, see [Assign a role to a user](#).
- To assign a role to a group, see [Assign a role to a group](#).

Healthcare and Life Sciences data model

The Healthcare and Life Sciences Service Management Core application provides a data model that is used in the Healthcare and Life Sciences Service Management workflows.

Overview

The Healthcare and Life Sciences data model is compatible with the Health Level Seven International (HL7) industry standard including the Fast Healthcare Interoperability Resources (FHIR) standard. The data model applies to all Healthcare and Life Sciences industry solutions including providers, life sciences, and payers. The model includes data tables for organizations, patients, practitioners, insurance, revenue cycle, and clinical data.

The data model uses a combination of tables to store data:

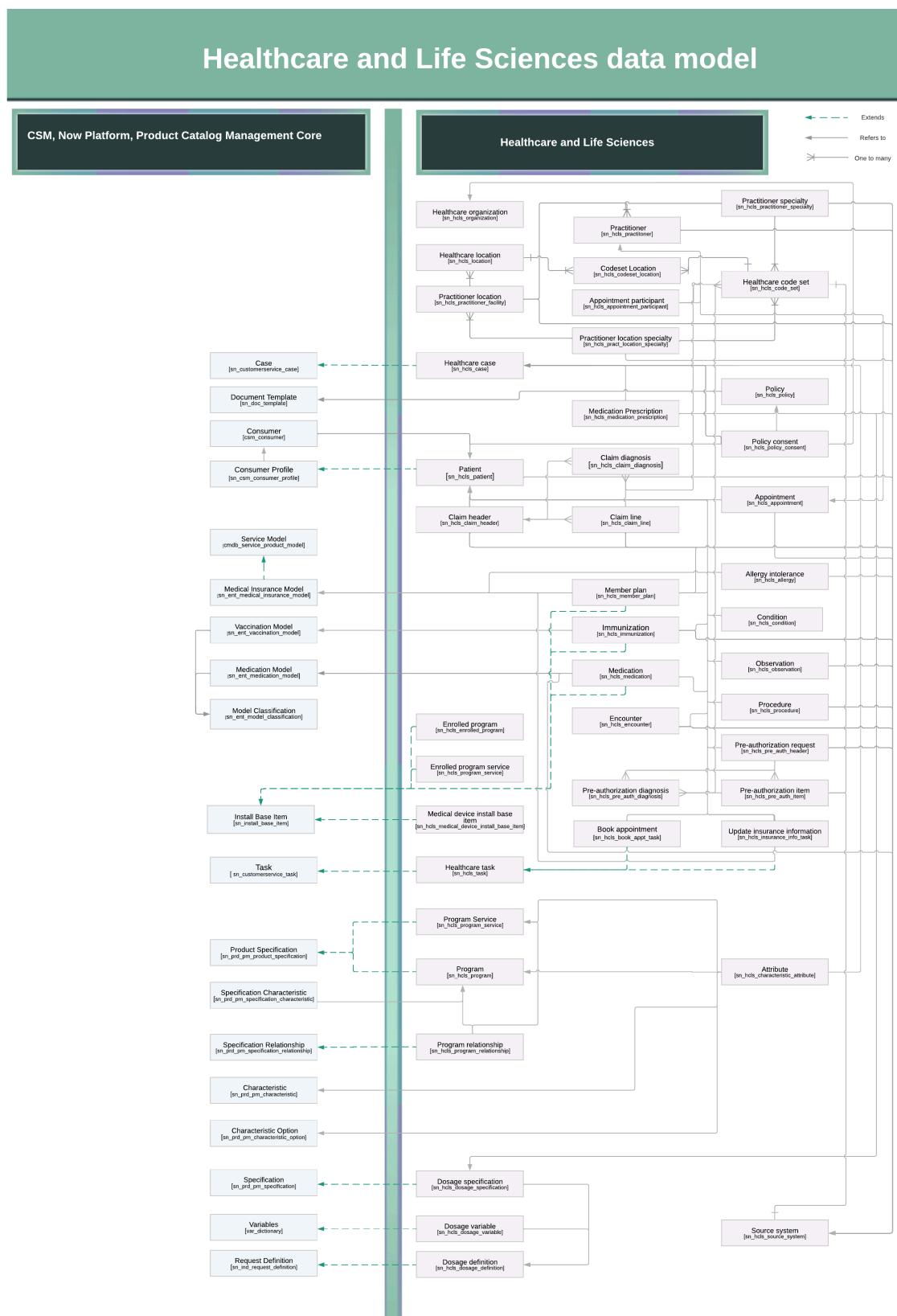
- Tables that are included with the Healthcare and Life Sciences Service Management Core application.
- Tables that are from the Customer Service Management (CSM) application.
- Tables that are from the Now Platform application.
- Tables that are from the Product Catalog Management Core application.

You can install the Healthcare and Life Sciences Service Management Core application to use only its data model for a basic configuration.

Healthcare and Life Sciences data model diagram

The following diagram shows the tables and their relationships that comprise the Healthcare and Life Sciences data model.

Healthcare and Life Sciences data model



Healthcare and Life Sciences Service Management Core tables for the Healthcare and Life Sciences data model

The Healthcare and Life Sciences data model uses the following tables included within the Healthcare and Life Sciences Service Management Core application to store data.

Healthcare and Life Sciences Service Management Core application tables

| Table | Description |
|---|--|
| Allergy intolerance [sn_hcls_allergy] | Stores the information about a clinical assessment of an allergy or intolerance; a propensity, or a potential risk to an individual, to have an adverse reaction on future exposure to the specified substance, or class of substance. |
| Appointment [sn_hcls_appointment] | Stores the appointment booking details for a patient in your healthcare organization. |
| Appointment participant [sn_hcls_appointment_participant] | Stores the participant details of an appointment. |
| Attribute [sn_hcls_characteristic_attribute] | Stores the characteristics options associated with a program or program service selected by a patient when submitting a healthcare request. |
| Book appointment [sn_hcls_book_appt_task] | Stores the task details for booking an appointment associated with a healthcare case or its extended case types. |
| Claim diagnosis [sn_hcls_claim_diagnosis] | Stores diagnosis information for claims. |
| Claim header [sn_hcls_claim_header] | Stores the details of the main claim submitted on behalf of a patient to a payer organization. |
| Claim line [sn_hcls_claim_line] | Stores the details of the items pertaining to a claim header. |
| Medical device install base item [sn_hcls_medical_device_install_base_item] | Stores the details of medical devices as install base items. |
| Condition [sn_hcls_condition] | Stores the information about a condition, problem, diagnosis, or other event, situation, |

Healthcare and Life Sciences Service Management Core application tables (continued)

| Table | Description |
|--|--|
| | issue, or clinical concept that has risen to a level of concern. |
| Dosage definition [sn_hcls dosage definition] | Models the Dosage specification [sn_hcls dosage specification] table for use as a request definition parameter. |
| Dosage specification [sn_hcls dosage specification] | Stores the information about medication product dosage associated with a program. |
| Dosage variable [sn_hcls dosage variable] | Stores the variables configured for a dosage specification displayed on the Medication Prescription form of a Healthcare and Life Sciences Service Management application. |
| Encounter [sn_hcls encounter] | Stores the information about an interaction between a patient and healthcare providers for providing healthcare services or assessing the health status of a patient. |
| Enrolled Program [sn_hcls enrolled program] | Stores the programs that a patient has been enrolled into |
| Enrolled Program Service [sn_hcls enrolled program service] | Stores the program services provided to a patient as part of a program enrollment process. |
| Healthcare case [sn_hcls case] | Stores healthcare-related cases. i Note: The Healthcare case [sn_hcls case] table is an abstract table and is extendable. |
| Healthcare code set [sn_hcls code set] | Stores the details of code sets available in your ServiceNow instance. |
| Healthcare location [sn_hcls location] | Stores details of the location associated with your healthcare organization. |
| Healthcare organization [sn_hcls organization] | Stores the details of a healthcare organization in your ServiceNow instance. |

Healthcare and Life Sciences Service Management Core application tables (continued)

| Table | Description |
|--|---|
| Healthcare sold product [sn_hcls_sold_product] | Stores the healthcare products sold to an account or consumer. |
| Healthcare Task [sn_hcls_task] | Stores the details of the task associated with a healthcare case or a patient in your healthcare organization. Note: The Healthcare Task [sn_hcls_task] is an abstract table and is extendable. |
| Immunization [sn_hcls_immunization] | Stores the information about an event of a patient being administered a vaccine or a record of an immunization as reported by a patient, a clinician, or another party. |
| Medication [sn_hcls_medication] | Stores the information about a medication for the purposes of prescribing, dispensing, and administering a medication as well as for making statements about medication use. |
| Medication Prescription [sn_hcls_medication_prescription] | Stores the information about prescriptions ordered for a patient. |
| Medication product model [sn_hcls_medication_product] | Stores the information about substances that are used to treat diseases, to relieve complaints, or to prevent such diseases or complaints in the first place. |
| Member Plan [sn_hcls_member_plan] | Stores the details of a health insurance plan associated with a patient. |
| Observation [sn_hcls_observation] | Stores the information about measurements and simple assertions made about a patient. |
| Patient [sn_hcls_patient] | Stores the details of a patient in your healthcare organization. |
| Practitioner [sn_hcls_practitioner] | Stores the details of a practitioner in your healthcare organization. |

Healthcare and Life Sciences Service Management Core application tables (continued)

| Table | Description |
|---|---|
| Policy [sn_hcls_policy] | Stores the details of a policy shared with patients in the Healthcare and Life Sciences applications. |
| Policy consent [sn_hcls_policy_consent] | Stores the details of a consent accepted by a patient or a household member on behalf of the patient. |
| Practitioner location [sn_hcls_practitioner_facility] | Stores the details of the location at which a practitioner provides healthcare services. |
| Practitioner location specialty [sn_hcls_pract_location_specialty] | Stores the details about types of services that a practitioner can provide for an organization at a specific location. |
| Practitioner specialty [sn_hcls_practitioner_specialty] | Stores the association details of a specialty with a practitioner. |
| Pre-authorization diagnosis [sn_hcls_pre_auth_diagnosis] | Stores diagnosis information pertaining to a pre-authorization for healthcare services. |
| Pre-authorization item [sn_hcls_pre_auth_item] | Stores the details of items pertaining to a pre-authorization request for healthcare services. |
| Pre-authorization request [sn_hcls_pre_auth_header] | Stores the authorization request details for a healthcare service provided by a payer organization. |
| Procedure [sn_hcls_procedure] | Stores the information about an action that is or was performed on or for a patient. An action can be a physical intervention like an operation, or less invasive like long-term services, counseling, or hypnotherapy. |
| Program [sn_hcls_program] | Stores the programs offered by healthcare organizations. |
| Program relationship [sn_hcls_program_relationship] | Stores the association details between a program and program service. |
| Program service [sn_hcls_program_service] | Stores the program services associated with a program. |

Healthcare and Life Sciences Service Management Core application tables (continued)

| Table | Description |
|--|--|
| Source system [sn_hcls_source_system] | Stores the source and destination IDs of an external healthcare system in your ServiceNow instance. |
| Update insurance information [sn_hcls_insurance_info_task] | Stores the task details for updating the insurance information of a patient in your healthcare organization. |
| Vaccine product [sn_hcls_vaccine_product] | Stores the models of all the supported vaccine products. |

Now Platform, Customer Service Management (CSM), and Product Catalog Management Core tables for the Healthcare and Life Sciences data model

The Healthcare and Life Sciences data model uses the following tables included within the Now Platform, Customer Service Management (CSM), and Product Catalog Management Core applications to store data.

Now Platform, CSM, and Product Catalog Management Core tables used in the Healthcare and Life Sciences data model

| Table | Description | Application |
|---|---|---------------------------------|
| Business location [sn_csm_business_location] | Provides the business location records. | CSM |
| Case [sn_customerservice_case] | Provides the cases for patients associated with customer contact records. | CSM |
| Characteristic [sn_prd_pm_characteristic] | Provides the attributes available for a product. | Product Catalog Management Core |
| Characteristic Option [sn_prd_pm_characteristic_option] | Provides the options for attributes available for a product. | Product Catalog Management Core |
| Consumer [csm_consumer] | Provides patient records associated with consumer records. | CSM |

Now Platform, CSM, and Product Catalog Management Core tables used in the Healthcare and Life Sciences data model (continued)

| Table | Description | Application |
|---|--|---------------------------------|
| Document template [sn_doc_template] | Provides document templates to generate standard letters or documents. | Now Platform |
| Household Member [csm_household_member] | Provides records of the patient members who have been added to a household. | CSM |
| Install Base Item [sn_install_base_item] | Provides the products installed or in use by an account or a customer. | CSM |
| Location [cmn_location] | Provides addresses associated with a patient. | Now Platform |
| Product Specification [sn_prd_pm_specification] | Defines, at a functional level, a product a service provider sells to the customer. | Product Catalog Management Core |
| Request Definition [sn_ind_request_definition] | Associates a task type and a workflow with a request data table. | Now Platform |
| Service organization [sn_customer_service_organization] | Provides records for service organizations, including business locations and internal business locations. | CSM |
| Sold product [sn_install_base_sold_product] | Provides the product purchased by a patient as a customer and references the Product Model [cmdb_model] table or Service Model [cmdb_service_product_model] table for a customer (customer account or consumer). | Now Platform |
| Specification [sn_prd_pm_specification] | Provides the base table for specifications included in the industry vertical applications. | Product Catalog Management Core |

Now Platform, CSM, and Product Catalog Management Core tables used in the Healthcare and Life Sciences data model (continued)

| Table | Description | Application |
|--|---|---------------------------------|
| Specification Characteristic [sn_prd_pm_specification_characteristic] | Provides the characteristics for product, service, and resource specifications. | Product Catalog Management Core |
| Specification Relationship [sn_prd_pm_specification_relationship] | Provides the association between the product, service, and resource specifications and how a product offering is decomposed, fulfilled, and delivered after a customer order is received. | Product Catalog Management Core |
| Task [task] | Provides a series of standard fields used on each of the tables that extend it. | Now Platform |
| Variables [var_dictionary] | Defines dynamic variables for a model used in an application form. | Now Platform |

Note: To learn about Now Platform, CSM, and Product Catalog Management Core tables, see [Industry data model tables](#), [Tables installed with Customer Service Management](#), [Tables installed with Model Management](#), and [Product catalog data model](#).

Configuring document templates for Healthcare and Life Sciences Service Management Core

Improve the patient experience by automatically identifying and assigning relevant healthcare documents including consent and privacy documents in a workflow that uses cases extending the healthcare case type.

As a user with the sn_hcls.admin role, you can digitize the generation of healthcare documents and forms by using in-built digital document templates. Healthcare documents can be used to collect information and get consent and signature from a patient, a practitioner, or both.

To create pre-filled and reusable healthcare documents, you map fields and variables from the tables to a document template. Document templates are created within the Healthcare and Life Sciences Service Management Core application. You can also decide who are the participants associated with the fields in the document by mapping appropriate user roles with participants.

You configure document templates in the Healthcare and Life Sciences Service Management Core application by navigating to **All > HCLS Service Management > Administration > Configure documents**. By default, you can create a document template

of type HTML or PDF. For more information, see [Document Templates of type HTML](#) and [Document Templates of type PDF \(Advanced forms\)](#).

After configuring a document template for a healthcare case table, you can configure decisions as to when initiate the document fulfillment process in a workflow. For more information, see [Configuring the auto-generation of documents for healthcare cases](#).

Configuring the auto-generation of documents for healthcare cases

You can define the conditions for auto-generating documents for a healthcare case.

As a user with the admin role, you can configure decision tables to automatically generate a healthcare document when the decision condition is satisfied for a healthcare case. For example, as part of the procedure scheduling process, you can define conditions to send privacy consent and procedure consent documents to patients for reviewing and signing them digitally.

Note the following points when configuring decision tables for healthcare cases:

- Associate the document template for the healthcare document as the answer for the decision.
- Associate the column in a healthcare case table as a decision input.

You configure decision tables for healthcare cases in the Healthcare and Life Sciences Service Management Core application by navigating to **All > HCLS Service Management > Administration > Document decisions**. The **Trigger document flow for HC case** business rule runs on insert and update of every healthcare case and evaluates all document decisions that have the case reference configured as an input. When the decision conditions are satisfied, the business rule initiates the document workflow for the associated document template.

For more information, see [Decision Tables](#).

Approving restricted caller access privileges for Healthcare and Life Sciences Service Management

Approve restricted caller access (RCA) privileges for accessing document templates from the Healthcare and Life Sciences Service Management applications.

RCA privileges define cross-scope access to an application, an event, or an application resource. Application resources include access control roles, business rules, UI actions, and script includes.

The real and requested RCAs required for accessing document templates from a Healthcare and Life Sciences Service Management application are included within the Healthcare and Life Sciences Service Management Core application.

When you install a Healthcare and Life Sciences Service Management application, the status of Real RCAs of the Document Templates application are set to **Requested**. For more information, see [Requested restricted caller access \(RCA\)](#).

To be able to use document templates in a Healthcare and Life Sciences Service Management application, as an administrator, you must set the status of Real RCAs of the Document Templates application to **Allowed**. For more information, see [Allow a restricted caller access privilege for document templates in Healthcare and Life Sciences Service Management Core](#).

Allow a restricted caller access privilege for document templates in Healthcare and Life Sciences Service Management Core

Allow restricted caller access (RCA) privileges for the Document Templates application in the target scope to access document templates from a Healthcare and Life Sciences Service Management application.

Before you begin

Ensure that the application scope is set to Document Templates in the application picker. For more information, see [Application picker](#).

Role required: admin

Procedure

1. Navigate to **All > System Applications > Application Restricted Caller Access**.
2. In the **Source Scope** column of the Restricted Caller Access Privileges list, search for the *Healthcare and Life Sciences Service Management Core*.
3. Click a requested RCA with the *Document Templates* target scope.
4. On the Restricted Caller Access Privilege form, set the **Status** field value to **Allowed**.
5. Click **Update**.
6. Repeat steps 3 through to 5 for each requested RCA.

Configuring programs and program services for Healthcare and Life Sciences workflows

You can configure the programs and the services within a program offered by healthcare organizations for patient or consumer enrollment.

A program within the Healthcare and Life Sciences Service Management Core application is a product catalog item offered by healthcare life organizations to their patients or consumers.

A program service within Healthcare and Life Sciences Service Management application is a product catalog item offered within a program by healthcare life organizations to their patients or consumers.

Configure a program service

Add a program service for use within the programs associated with the Healthcare and Life Sciences Service Management applications.

Before you begin

Role required: sn.hcls_manager or admin

About this task

By default, the application provides a few sample program services for the Healthcare and Life Sciences workflows that you can use as a reference when creating a program service.

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Program service**.
2. In the Program services list, click **New**.
3. On the form, fill in the fields.

Program service form

| Field | Description |
|-------------|---|
| Number | Unique identifier for the program service. This field is automatically set to an auto-generated number. |
| Name | Name to identify the program service. |
| Active | Option to enable the program service for use. |
| State | State of the program service. This field is automatically set to the Draft state. |
| Start Date | Date when the program service is scheduled to start. |
| End Date | Date when the program service is scheduled to end. i Note: The end date of the program service must be later than the start date. |
| Description | Summary of the program service. |

i Note: Either enter the date in the yyyy-mm-dd format, such as 2021-12-31, or click the select date icon corresponding to the date type. For example, provide the end date of the program service by either entering the date in the **End Date** field or clicking the select date icon () and selecting the date.

4. Click **Submit**.
5. Optional: [Configure a specification characteristic for the program service](#).
6. Optional: [Associate the program service with a program](#).
7. [Publish the program service](#).

Configure a specification characteristic for a program service

Create a specification characteristic so that you can define the program service offering in Healthcare and Life Sciences programs.

Before you begin

Role required: sn.hcls_manager or admin

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Program service**.
2. In the Program services list, click the link to a program service from the **Number** column.
3. In the Specification Characteristics related list, click **New**.
4. In the **Characteristic** field, click the lookup icon  and select a characteristic from the **Name** column of the Characteristics list.

By default, the application provides the **Benefit Investigation** characteristic for use as a reference when creating a characteristic. To create a new characteristic, click **New** in the Characteristics list and fill in the characteristic details.

5. Optional: In the **Characteristic Option** field, click the lookup icon  and select a characteristic option from the **Option** column of the Characteristic Options list. To create a new characteristic option, click **New** in the Characteristic Options list and fill in the characteristic option details.
6. Optional: Select the **Mandatory** check box to make the specification characteristic as a requirement for completing the program service.
7. Click **Submit**.

 **Note:** You can ignore the Activities section, which is not used.

Associate a program service with a program

Create a relationship between a program service and programs to make the service available within the program.

Before you begin

[Configure a program](#).

Role required: sn.hcls_manager or admin

About this task

You can also associate a program service with a program by using the Program module. For more information, see [Associate a program with a program service](#).

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Program service**.
2. In the Program services list, click the link to a program service from the **Number** column.
3. In the Program relationships related list, click **New**.
4. In the **Program** field, click the lookup icon  and select the program from the **Name** column of the Specifications list.
5. In the **Program service** field, click the lookup icon  and select a program service from the **Name** column of the Specifications list.
6. In the **Relationship Type** field, select **Offers**.
7. Select the **Active** check box for activating the relationship.
8. Click **Submit**.

Publish a program service

Publish a program service for use within the Healthcare and Life Sciences Service Management applications.

Before you begin

Role required: sn.hcls_manager or admin

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Program service**.
2. In the Program services list, click the link to the program service from the **Number** column.
3. On the Program service form, click **Publish** to make the program service available for use within Healthcare and Life Sciences Service Management applications.

Configure a program

Add a program for use within the Healthcare and Life Sciences Service Management applications.

Before you begin

- To associate an eligibility criteria checklist with the program, create a checklist. For more information, see [Create a checklist](#).

i Note: By default, the application provides a few checklist templates that you can use as a reference when creating a checklist for a Healthcare and Life Sciences program.

- To associate a medication product with the program, you must enter the products in the Medication product model [sn_hcls_medication_product] table. For more information, see [Medication product model table](#).

Role required: sn.hcls_manager or admin

About this task

By default, the application provides a few sample programs for the Healthcare and Life Sciences workflows that you can use as a reference when creating a program.

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Program**.
2. In the Programs list, click **New**.
3. In the **Name** field, enter a name to identify the program.
4. Optional: In the **Eligibility criteria** field, click the lookup icon and select a checklist from the **Name** column of the Checklist Templates list.
5. Select the **Active** check box to enable the program for use.
6. Provide the start date by either entering the date in the **Start Date** field in the yyyy-mm-dd format, such as 2021-12-31, or clicking the select date icon and selecting the date.
7. Optional: Provide the end date by either entering the date in the **End Date** field in the yyyy-mm-dd format, such as 2021-12-31, or clicking the select date icon and selecting the date.

i Note: The end date of the program must be later than the start date.

8. Optional: Associate medication products with the program.
 - a. Click the unlock medication product icon next to the **Medication product** field.
 - b. Click the lookup icon for the **Medication product** field.
 - c. In the Medication product models list, click the link to the medication product.
 - d. To add multiple medication products, repeat steps 8.b through 8.c.

Note: When you add a medication product for a program, you must also configure the dosage specifications for the medication product. For more information, see [Configuring dosage specifications for a medication product](#).

9. In the **Description** field, enter a summary of the program.
10. Click **Submit**.
11. Optional: [Configure a specification characteristic for the program](#).
12. Optional: [Associate the program with a program service](#).
13. [Publish the program](#).

Configure a specification characteristic for a program

Create a specification characteristic so that you can define the program offering in Healthcare and Life Sciences workflows.

Before you begin

Role required: sn.hcls_manager or admin

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Program**.
2. In the Programs list, click the link to a program from the **Number** column.
3. In the Specification Characteristics related list, click **New**.
4. In the **Characteristic** field, click the lookup icon  and select a characteristic from the **Name** column of the Characteristics list.
By default, the application provides the **Benefit Investigation** characteristic for use as a reference when creating a characteristic. To create a new characteristic, click **New** in the Characteristics list and fill in the characteristic details.
5. Optional: In the **Characteristic Option** field, click the lookup icon  and select a characteristic option from the **Option** column of the Characteristic Options list.
To create a new characteristic option, click **New** in the Characteristic Options list and fill in the characteristic option details.
6. Optional: Select the **Mandatory** check box to make the specification characteristic as a requirement for completing the program.
7. Click **Submit**.

Note: You can ignore the Activities section, which is not used.

Associate a program with a program service

Create a relationship between a program and program services to make the program service available within the program.

Before you begin

[Configure a program service](#).

Role required: sn.hcls_manager or admin

About this task

You can also associate a program with a program service by using the Program service module. For more information, see [Associate a program service with a program](#).

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Program**.
2. In the Programs list, click the link to a program from the **Number** column.
3. In the Program relationships related list, click **New**.
4. In the **Program** field, click the lookup icon  and select the program from the **Name** column of the Specifications list.
5. In the **Program service** field, click the lookup icon  and select a program service from the **Name** column of the Specifications list.
6. In the **Relationship Type** field, select **Offers**.
7. Select the **Active** check box for activating the relationship.
8. Click **Submit**.

Publish a program

Publish a program for use within the Healthcare and Life Sciences Service Management applications.

Before you begin

Role required: sn.hcls_manager or admin

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Program**.
2. In the Programs list, click the link to the program from the **Number** column.
3. On the Program form, click **Publish** to make the program available for use within Healthcare and Life Sciences Service Management applications.

Configuring dosage specifications for a medication product

You can enable a healthcare representative to enter the dosage for a medication product by configuring dosage specifications.

To learn about components of a dosage specification, see [Dosage concepts](#).

Dosage specification configuration tasks

| Task | Description |
|--|--|
| Configure a characteristic for a dosage specification. | Configure a characteristic for a dosage so that you can define the dosages for a medication product in Healthcare and Life Sciences workflows. |
| Configure a dosage specification for a medication product associated with a program. | Create a dosage specification associated with a medication product included in a program. |

Dosage specification configuration tasks (continued)

| Task | Description |
|---|--|
| Configure the mapping between a dosage characteristic and a dosage details field. | Use scripted extension points to decide which dosage characteristics are mapped to the fields on the Dosage details section of a Medication Prescription form. |

Dosage concepts

You can increase the efficiency of healthcare representatives and reduce manual errors by configuring dosage specifications for a medication product associated with a program.

A dosage comprises the following key components:

- [Dosage specifications](#)
- [Dosage characteristics](#)
- [Dosage characteristic groups](#)

To learn about how dosage components are linked to each other, see [Dosage characteristics mapping](#).

Dosage specifications

A dosage specification consists of diagnosis details and dosage characteristics of a medication product associated with a program. For more information, see [Dosage specification table](#).

- Note:** When you add a dosage specification for a medication product, an equivalent dosage definition entry is added in the application. A dosage definition models a dosage specification for use as a request definition parameter. For more information, see [Dosage definition table](#).

Dosage characteristics

A dosage characteristic defines the attributes of a dosage specification.

A dosage characteristic has the following features:

- Is included in the **Dosage characteristics** characteristic group and a characteristic group mapped to a field in the Dosage details section of a medication prescription form.
- Can include a characteristic option to restrict the characteristic value. For example, to restrict the quantity of dosage. Else, when a characteristic option isn't specified for a dosage characteristic, a healthcare representative can later fill the corresponding field value in the Dosage details section of the Medication Prescription form.
- Is unique for a characteristic group when multiple entries for a characteristic are created. For example, when a dosage specification includes quantity characteristic as quantity per month supply, you can't add another characteristic for the quantity per week supply.
- Similar dosage characteristics are stored in the Characteristic Group [sn_prd_pm_configuration] table.

Note: For each dosage characteristic added to a dosage specification, a dosage variable is automatically created. A dosage variable is displayed as a dynamic field in the Dosage characteristics section of the Medication Prescription form. For more information, see [Dosage variable table](#).

Characteristic groups for a dosage

A dosage characteristic group comprises the similar characteristics of a dosage specification. Each dosage characteristic maps to a field in the Dosage details section of the Medication Prescription form. For a dosage characteristic to appear with a dosage specification, you must include it in the following characteristic groups:

- A characteristic group mapped to a field in the Dosage details section of a medication prescription form.
- The **Dosage characteristics** characteristic group available by default.

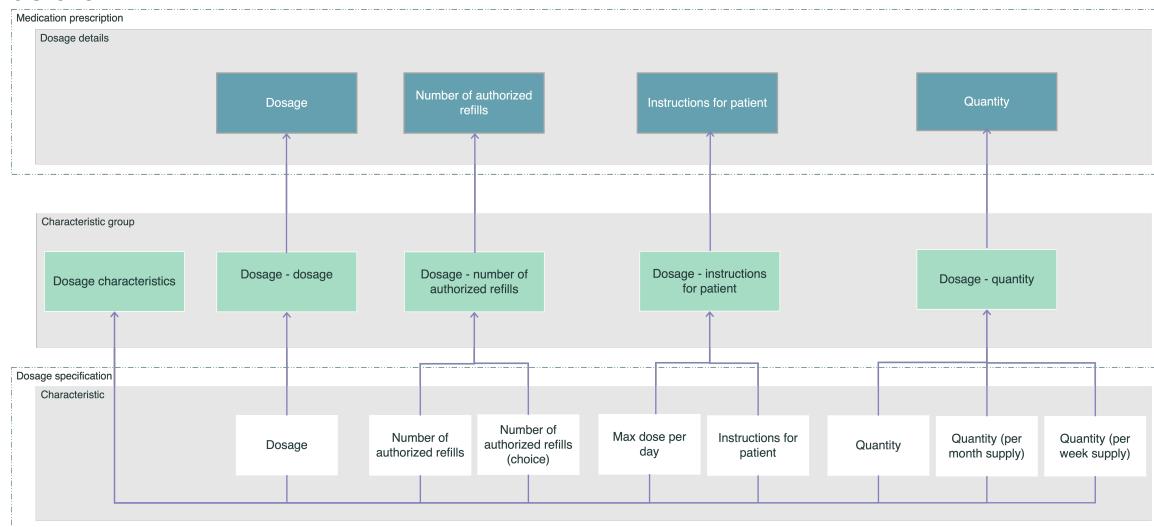
Dosage characteristics mapping

You map a dosage characteristic group with a field in the Dosage details section of the Medication Prescription form. You can use the `DosageCharacteristicsMapper` extension point to configure the mapping between a characteristic group and a field in the Dosage details section of the Medication Prescription form. For more information, see [Configure the mapping between a dosage characteristic and a dosage details field](#).

By default, the application provides a few sample characteristics and characteristic groups for the Healthcare and Life Sciences workflows that you can use as a reference when creating a dosage specification.

The following figure illustrates the default mapping between characteristics and characteristic groups of a dosage specification, and the mapping between characteristic group of a dosage specification and dosage details fields of a medication prescription.

Default mapping of characteristics, characteristic groups, and the dosage details



Configure a dosage specification for a medication product associated with a program

Create a dosage specification associated with a medication product included in a program.

Before you begin

- [Configure a program](#).

Note: When configuring a program, associate medication products with the program.

Role required: sn_hcls.admin

About this task

By default, the application provides a few sample dosage characteristics for the Healthcare and Life Sciences workflows that you can use as a reference when creating a dosage characteristic. All the same dosage characteristics are associated with the Dosage Characteristics group.

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Dosage specifications**. Alternatively, when [configuring a program](#), select the Dosage specifications related list.
2. In the Dosage specifications list, modify an existing dosage specification or click **New** to create another specification.
3. On the form, fill in the fields.

Dosage specification form

| Field | Description |
|---------------------|---|
| Name | Name to identify the dosage specification. |
| Program | Program associated with the medication product, |
| Medication product | Medication product being prescribed for the patient. |
| Primary diagnosis | Main condition in a patient submitted by the practitioner as the reason for the healthcare service requested. |
| Secondary diagnosis | Coexisting condition that might exist in a patient submitted by the practitioner. |
| Tertiary diagnosis | Highly specialized medical care recommended for the patient by the practitioner. |
| Dosage definition | This field is automatically set to dosage definition value based on the dosage specification as the template. |
| State | Status of the dosage specification. |

| Field | Description |
|-------------|---|
| | If you have not published the dosage specification, this field is automatically set to Draft . If you have already published the dosage specification, this field is automatically set to Published . |
| Active | Option for enabling the dosage specification. |
| Description | Additional information about the dosage specification. |

4. Save the dosage specification settings.

- Save a new specification by clicking **Submit**.
- Save the changes to an existing specification by clicking **Update**.

5. Configure characteristics for the dosage specification.

6. Publish the dosage specification for use in the medication products added to the associated program.

- a. In the Dosage specifications list, select the dosage specification.
- b. On the Dosage specification form, click **Publish**.

Configure a characteristic for a dosage specification

Configure a characteristic for a dosage so that you can define the dosages for a medication product in Healthcare and Life Sciences workflows.

Before you begin

To add a specification characteristic, ensure that the dosage specification is in the **Draft** state.

Role required: sn.hcls_admin or admin

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Dosage specifications**.
2. In the Dosage specifications list, click the link to a dosage specification from the **Name** column.
3. In the Specification Characteristics related list, click **New**.
4. In the **Characteristic** field, click the lookup icon  and select a characteristic from the **Name** column of the Characteristics list.

By default, the application provides the following dosage characteristics for use as a reference:

- Dosage
- Instructions for patient
- Max dose per day
- Number of authorized refills
- Number of authorized refills (choice)
- Quantity

- Quantity (per month supply)
- Quantity (per week supply)

To create a new characteristic, click **New** in the Characteristics list and fill in the characteristic details.

5. Optional: Add characteristic options for a characteristic of the Choice input type by clicking the lookup icon  in the **Characteristic Option** field and selecting a characteristic option from the **Option** column of the Characteristic Options list.
To create a new characteristic option, click **New** in the Characteristic Options list and fill in the characteristic option details.
6. Click **Submit**.

 **Note:** You can ignore the Activities section, which is not used.

7. To associate a characteristic with a dosage specification, add the characteristic to a characteristic group included in the Dosage characteristic group.

Configure the mapping between a dosage characteristic and a dosage details field

Use scripted extension points to decide which dosage characteristics are mapped to the fields on the Dosage details section of a Medication Prescription form.

Before you begin

Set the application scope to Healthcare and Life Sciences Service Management Core using the application picker. For more information, see [Application picker](#) .

Role required: admin

About this task

The Healthcare and Life Sciences Service Management Core application installs the `sn_hcls.DosageCharacteristicsMapper` script include and the `DosageCharacteristicsMapper` extension point.

The `DosageCharacteristicsMapper` extension point in the `sn_hcls.DosageCharacteristicsMapper` script include is preconfigured for the mapping between characteristics in the dosage-related characteristic groups and the Dosage details fields on a medication prescription. The default implementation of the `getMappingObject` method in the `DosageCharacteristicsMapper` extension point maps the dosage-related characteristic groups and Dosage details fields of a Medication Prescription form as shown in the following table.

Default mapping of the dosage-related characteristic groups and Dosage details fields

| Dosage characteristic group | Dosage details field |
|---------------------------------------|------------------------------|
| Dosage - dosage | Dosage |
| Dosage - number of authorized refills | Number of authorized refills |
| Dosage - instructions for patient | Instructions for patient |

Default mapping of the dosage-related characteristic groups and Dosage details fields (continued)

| | |
|-----------------------------|----------------------|
| Dosage characteristic group | Dosage details field |
| Dosage - quantity | Quantity |

Using extension points makes it easier to integrate customizations without actually altering the base code. You can extend standard base functionality using customized scripts. For more information, see [Using extension points to extend application functionality](#).

An implementation is available in the base system for scripted extension points. You can modify the data and add additional fields.

Procedure

1. Navigate to All > System Extension Points > Scripted Extension Points.
2. In the API Name column, search for and click `sn_hcls.DosageCharacteristicsMapper`.
3. On the Extension Point form, select a script include to use the `DosageCharacteristicsMapper` extension point.
 - Modify the existing script by going to the Implementations related list and clicking `DosageCharacteristicsMapper`.
 - Create and register a custom script include.
4. Include your mapping logic by adding the `getMappingObject` method to your script include that implements the `DosageCharacteristicsMapper` extension point. You can create multiple implementations for the extension point and provide an order number for each implementation. The implementation that has the lowest order number is executed first.
5. On the Extension Point form, click **Update**.

Specify a to-do item for patients

Add a to-do item that patients in your healthcare organization must complete as part of their healthcare activity.

Before you begin

Set the application scope to Healthcare and Life Sciences Service Management Core using the application picker. For more information, see [Application picker](#).

Role required: admin

Procedure

1. Enter `sys_properties.list` in the navigation filter, and then open the `sn_hcls.to.do.tasks.list` property.
2. In the **Value** field, enter a task table name that is displayed as a to-do item on a patient portal.
For multiple entries, separate the task table names with commas.
3. Click **Update**.

Related topics

[Healthcare and Life Sciences Service Management Core properties](#)

Configure the service portal to add a to-dos menu item for completing healthcare-related tasks

Enable the to-dos menu item that uses the HCLS to dos (hcls-todo-list) widget for displaying to-do items on a service portal.

Before you begin

Set the application scope to Global using the application picker. For more information, see [Application picker](#).

Role required: admin

About this task

The HCLS to dos (hcls-todo-list) service portal widget is pre-configured to display to-do items for patients. By default, the widget is included in the hcls_todos page provided with the Healthcare and Life Sciences Service Management Core application. In this procedure, you add a menu item to a patient portal to access the hcls_todos page.

Procedure

1. Navigate to **All > Service portal > Menus**.
2. Select the header menu for the patient portal.
3. In the Menu Items related list, click **New**.
4. On the form, fill in the fields.

Menu Item form

| Field | Description |
|-------------|--|
| Label | Name that appears for the item in the menu. |
| Parent Menu | This field is automatically set to the name of the menu you are adding items to. You can change the value as required to other menus. |
| Type | Page the item links to. For example, you can link to another page in the portal, or an external URL. Form fields vary depending on the option you select from this list. |
| Order | Value that determines where the item appears in the menu in relation to other menu items. |
| Page | Name of the portal page the item links to. To use the hcls_todos page provided with the application, set the value to the hcls_todos. |
| Condition | Conditions required for menu items to show in the header. |

| Field | Description |
|-------|---|
| Glyph | Icon that appears beside the menu item. |

5. Click **Save**.

Determining the consent management process for patients

You can determine whether the privacy policy for patient consent needs to be routed for review and signature to the patient.

As a user with the sn_hcls.admin role, you can configure a privacy policy for obtaining consent from patients in a healthcare organization. For more information, see [Configure a privacy policy for managing patient consent](#).

You can determine the consent management process as one of the following types:

- [Standard](#)
- [Document](#)

Configuring standard policy types

A standard policy doesn't require a consent form to be reviewed or signed by a patient.

With the Standard policy type, a patient is required to sign the same consent again and again each time a service is requested.

Configuring document policy types

A document policy requires a consent form to be reviewed, signed, or both by a patient.

With the Document template policy type, a to-do item is created for the patient to sign the consent form.

You must configure the document that needs to be signed by a patient, create decision rules for it, and reference the document in the policy. For more information, see [Configuring document templates for Healthcare and Life Sciences Service Management Core](#).

i Note: You can associate only one active policy with a document template.

When setting up the privacy policy, you can also specify the validity duration in days for the consent after a patient signs the consent form. An accepted consent for an active policy is valid for multiple healthcare requests until the validity duration specified in the policy starting from date when the consent was given. Therefore, a patient needs to give consent only once for all healthcare requests submitted during the validity duration of an active consent policy. By default, the *Set inactive status for expired policy consents* scheduled job is configured to set any policy consent as inactive when the policy validity duration has expired.

After a patient gives the consent, the consent document is added as an attachment to the policy consent. The case associated with the initial healthcare request for which the consent was given is associated with the policy consent record.

The existing policy consent is associated with a new case to address another request from the same patient when all of the following conditions are true:

- The consent privacy policy is still active.
- The case was created within the validity duration of the accepted consent.
- The document decision rule of the document template associated with the new case is met.

Else, another to-do item is created for the patient to provide the consent.

When working on a healthcare case, a healthcare agent can then review and verify the accepted consent. If no consent was accepted, the healthcare agent has to wait until the patient gives the consent.

Configure a privacy policy for managing patient consent

Configure a privacy policy for effectively managing patient and member consent to a healthcare request.

Before you begin

Role required: sn_hcls.admin or admin

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Privacy Policy**.
2. In the Policies list, click **New**.
3. On the form, fill in the fields.

Policy form

| Field | Description |
|-----------------|---|
| Number | <p>Alpha-numeric profile identifier of the policy.</p> <p>The value is auto-generated and is incremented every time you add a new policy to your ServiceNow instance. The initial value for the Number field is POL00001000.</p> <p>Note: To customize the number, define the auto-numbering format for the Policy [sn_hcls_policy] table. For more information, see Add auto-numbering records in a table.</p> |
| Policy category | <p>This field should be set to Registration.</p> |
| Policy type | <p>Type of the policy.</p> <p>A policy is one of the following types:</p> <ul style="list-style-type: none"> ◦ Standard: A policy that doesn't require a consent form to be signed by a patient. ◦ Document template: A policy that requires a consent form to be signed by a patient. <p>With the Document template policy type, a to-do item is created for the patient to sign the consent form.</p> |

| Field | Description |
|-----------------------------|--|
| Validity duration (in days) | Number of days the policy is valid for after a patient signs the policy. |
| Active | Option for enabling the privacy policy. |
| Scope | Type of consent included in the policy. For privacy consent, select Privacy consent . Else, this field should be left empty. |
| Document template | Document template to generate standard letters or documents associated with the policy. This field is used only when the Policy type field is set to Document template . i Note: You can associate only one active policy with a document template. For more information, see Configuring document templates for Healthcare and Life Sciences Service Management Core . |
| External policy link | External reference to the policy included in a consent scope. |
| Policy name | Name to identify the policy. |
| Policy content | Content of the policy that should be read and accepted by the Patient Portal users at the time of registration. |

4. Click **Submit**.

Configuring the Patient Portal

Set up the Patient Portal available within the Healthcare and Life Sciences Service Management Core application to enable patients to access their healthcare information from the portal.

Patient Portal configuration tasks

| Task | Description |
|---|---|
| Configure the privacy policy settings for the Patient Portal. | Configure the privacy policy settings to enable users to provide their privacy consent at the time of registration on the Patient Portal. |

Patient Portal configuration tasks (continued)

| Task | Description |
|---|---|
| Configure the self-registration feature on the Patient Portal. | Enable or disable the self-registration feature on the Patient Portal by setting the value of the Enables self registration on Healthcare patient Portal property (<code>sn_hcls.enable_self_registration</code>). |
| Configure the knowledge base for articles in Healthcare and Life Sciences Service Management. | Configure the Healthcare and Life Sciences knowledge base that contains the knowledge articles available on the Patient Portal. |
| Configure the Patient Portal widgets. | Use widgets included within the Healthcare and Life Sciences Service Management Core application to bring together healthcare data and information for the patient on the Patient Portal. |
| Set up the process for self registration on the Patient Portal. | Manage the process of self-registration for your patients on the Patient Portal by using a service portal page. |
| Set up the process for submitting personal information on the Patient Portal. | Manage the process of submitting the personal information from your patients on the Patient Portal by using a record producer. |
| Configure Healthcare and Life Sciences Virtual Agent conversations. | Enable patients to view their healthcare request status using Virtual Agent conversations. |

Configure the privacy policy settings for the Patient Portal

Configure the privacy policy settings to enable users to provide their privacy consent at the time of registration on the Patient Portal.

Before you begin

Role required: `sn_hcls.admin` or `admin`

Procedure

1. Navigate to **All > HCLS Service Management > Administration > Privacy Policy**.
2. In the Policies list, modify an existing privacy policy or click **New** to create another policy.
3. On the form, fill in the fields.

Policy form

| Field | Description |
|--------|--|
| Number | <p>Alpha-numeric profile identifier of the policy.</p> <p>The value is auto-generated and is incremented every time you add a new policy to your ServiceNow instance. The initial value for the Number field is <code>POL00001000</code>.</p> |

| Field | Description |
|-----------------------------|---|
| | <p>Note: To customize the number, define the auto-numbering format for the Policy [sn_hcls_policy] table. For more information, see Add auto-numbering records in a table.</p> |
| Policy category | This field should be set to Registration . |
| Policy type | <p>Type of the policy.</p> <p>A policy is one of the following types:</p> <ul style="list-style-type: none"> ◦ Standard: A policy that doesn't require a consent form to be signed by a patient. ◦ Document template: A policy that requires a consent form to be signed by a patient. <p>With the Document template policy type, a to-do item is created for the patient to sign the consent form.</p> |
| Validity duration (in days) | Number of days the policy is valid for after a patient signs the policy. |
| Active | Option for enabling the privacy policy. |
| Scope | <p>Type of consent included in the policy.</p> <p>For privacy consent, select Privacy consent. Else, this field should be left empty.</p> |
| Document template | <p>Document template to generate standard letters or documents associated with the policy.</p> <p>This field is used only when the Policy type field is set to Document template.</p> <p>Note: You can associate only one active policy with a document template.</p> <p>For more information, see Configuring document templates for Healthcare and Life Sciences Service Management Core.</p> |
| External policy link | External reference to the policy included in a consent scope. |
| Policy name | Name to identify the policy. |

| Field | Description |
|----------------|---|
| Policy content | Content of the policy that should be read and accepted by the Patient Portal users at the time of registration. |

4. Save the privacy policy settings.

- Save a new privacy policy by clicking **Submit**.
- Save the changes to an existing privacy policy by clicking **Update**.

Configure the self-registration feature on the Patient Portal

Enable or disable the self-registration feature on the Patient Portal by setting the value of the **Enables self registration on Healthcare patient Portal** property (*sn_hcls.enable_self_registration*).

Before you begin

Set the application scope to Healthcare and Life Sciences Service Management Core using the application picker. For more information, see [Application picker](#).

Role required: admin

Procedure

1. Enter `sys_properties.list` in the navigation filter, and then open the `sn_hcls.enable_self_registration` property.
2. In the **Value** field, enter the required value.
 - Enter `true` to enable the self-registration feature in the Patient Portal.
 - Enter `false` to disable the self-registration feature in the Patient Portal.
3. Click **Update**.

Configuring the knowledge base for articles in Healthcare and Life Sciences Service Management

You can configure the Healthcare and Life Sciences knowledge base that contains the knowledge articles available on the Patient Portal.

As a user with the `sn_hcls.admin` role, you can configure the Healthcare and Life Sciences knowledge base to decide which users, roles, and groups can read and contribute to the knowledge base. By default, users with the knowledge role can contribute to and any users can read the knowledge articles in the Healthcare and Life Sciences knowledge base. For more information, see [Knowledge base setup guide for knowledge admins and managers](#).

To access the Healthcare and Life Sciences knowledge base, navigate to **All > HCLS Service Management > Administration > Knowledge Base**. By default, the articles associated with the Frequently asked and questions knowledge category are displayed in the **Frequently asked questions** section of the patient portal and the articles associated with no category are displayed in the **Latest news & articles** section of the Patient Portal.

Configuring the Patient Portal widgets

The Patient Portal included within the Healthcare and Life Sciences Service Management Core application uses widgets to bring together healthcare data and information for the patient.

Widgets on the Patient Portal are service portal widgets but available within the Healthcare and Life Sciences Service Management Core application scope. As a user with the sn_hcls.admin or admin role, you can configure various options for a widget from the context menu. To view configuration options available for a Patient Portal widget, open the Patient Portal page, select the control key, and the right-click the widget. For more information, see [Configure widget instances](#).

The following widgets are included in the Patient Portal.

Patient Portal widgets

| Widget | Description |
|----------------------------------|--|
| Appointment reminder card widget | Displays the next appointment reminder for the logged-in user. |
| COVID-19 status widget | Displays the vaccination status for the COVID-19 vaccine doses that logged-in user has either taken or self-reported and any COVID test results. |
| Faq widget | Displays a list of FAQ articles for a patient. |
| Household widget | Displays a list of household members that the logged in user is authorized representative for. |
| News and Articles widget | Displays a list of articles that are accessible to patients. |
| Open requests widget | Displays a list of open requests including healthcare-related cases created for the patient. |
| Pending to-dos widget | Displays a list of to-do items assigned to a patient. |
| Vaccinations widget | Displays a list of vaccines recommended for the logged-in user. |

For more information about available Patient Portal widgets, see [Patient Portal widget library](#).

Setting up the process for self-registration on the Patient Portal

You can manage the process of self-registration for your patients on the Patient Portal by using a service portal page.

As a user with the admin role, you can create a service portal page to define the fields for the page from where patients can create an account on the Patient Portal and then embed the page in the Patient Portal.

By default, the **patient_registration** service portal page is available for creating an account on the Patient Portal. You can use the default page to add more fields or create your own page. For more information, see [Service Portal pages](#).

Setting up the process for submitting personal information on the Patient Portal

You can manage the process of submitting the personal information from your patients on the Patient Portal by using a record producer.

As a user with the admin role, you can create a record producer to define the fields for the form where patient's can enter their personal information and then embed the form in the Patient Portal.

By default, the *Enter personal Info* record producer is available for submitting key personal information. You can use the default record producer to add more fields or create your own record producer. For more information, see [Record Producer](#).

Note: When the Vaccine Administration Management application is installed, a different record producer is available for submitting personal information for vaccines. For more information, see [Setting up the process for submitting personal information for vaccines](#).

Configuring Healthcare and Life Sciences Virtual Agent conversations to view a healthcare request status

The predefined Healthcare and Life Sciences Virtual Agent chatbot conversation enables patients to view their healthcare request status.

A Virtual Agent conversation topic defines the dialog between the Virtual Agent chatbot and the patient to accomplish a specific goal. The information exchanged during the conversation flow, such as user inputs and virtual agent responses, enables the virtual agent to fulfill a request or help complete a task.

Virtual Agent when integrated with the Healthcare and Life Sciences Service Management Core application, enhances the patient experience by addressing request-related queries immediately. At any time during a virtual conversation, a patient can request to interact with a live agent. For more information, see [Virtual Agent](#).

The Healthcare and Life Sciences Service Management Core application includes the read-only **Check request status** Virtual Agent topic. When the **Check request status** topic is active, patients can search for their requests and check the status of an existing active request. To make a Virtual Agent topic available, as a user with the admin role, you must publish a predefined Virtual Agent topic. For more information, see [Publish a Virtual Agent topic](#).

As an administrator, you can also duplicate a pre-defined Virtual Agent topic to customize and then publish the topic. For more information, see [Duplicate a Virtual Agent topic](#).

Configuring the Healthcare and Life Sciences Service Management Core email notifications

Configure the Healthcare and Life Sciences Service Management Core email notifications sent to patients about account registration with the Patient Portal.

Healthcare and Life Sciences Service Management Core includes the following email notifications.

Email notifications

| Notification | Condition | Recipient |
|--|--|--|
| Patient Registration Confirmation Link | An account is created in the Patient Portal and user needs to verify the account with the registered email ID. | User who created the account with the registered email ID. |

As a user with the sn_hcls.admin role, you can configure the email notifications for the Healthcare and Life Sciences Service Management Core application, by navigating to **All > System Notification > Email > Notifications**. For more information on editing email notifications, see [Create an email notification](#).

Configure an external Redox healthcare system as a source system for a custom integration

Enable a custom integration application to exchange data with an external Redox healthcare system by configuring the source and destination IDs of the healthcare system in your ServiceNow instance.

Before you begin

Role required: sn_hcls.admin or admin

About this task

As a healthcare provider, you can store the source and destination IDs of an external healthcare system in the [Source system \[sn_hcls_source_system\]](#) table for a custom integration with a ServiceNow application.

Procedure

1. Navigate to **All > System Definition > Tables**.
2. In the **Name** column of the Tables list, search for `sn_hcls_source_system`.
3. Select **Source system** from the **Label** column.
4. Click the **Show Form** related link.
5. On the form, fill in the fields.

Source system form

| Field | Description |
|----------------|---|
| Source ID | ID of the external Redox healthcare system used for processing an inbound API response from the system to your ServiceNow instance. |
| Destination ID | ID of the external Redox healthcare system used for sending an outbound API request to the system from your ServiceNow instance. |
| Source | Name to identify the external Redox healthcare system as a source system in your ServiceNow instance. |

6. Click **Submit**.

B2B2C with Healthcare and Life Sciences Service Management Core

You can configure the Customer Service Management (CSM) data models to enable business-to-business-to-consumer (B2B2C). This model can be used to support employees of a business customer or end consumers of a business customer.

The business-to-business (B2B) model supports customer accounts and the contacts within those accounts. The business-to-consumer (B2C) model supports individual consumers. These models are supported by default in Healthcare and Life Sciences Service Management Core.

The B2B2C model enables you to support business customers and third-party channel partners who, in turn, support the end consumers. This model must be enabled manually for use with Healthcare and Life Sciences Service Management Core.

As a user with the admin role, you can enable B2B2C for use with Healthcare and Life Sciences Service Management Core by configuring the Customer Data Models. For more information, see [Customer Data Models for B2B2C](#).

Configure the Customer Data Models for B2B2C to enable contacts of accounts to open healthcare cases on the CSM portal by following the steps below:

1. [Install the Customer Data Models for B2B2C plugin for Healthcare and Life Sciences Service Management Core](#)
2. [Configure the account consumer related list to add account consumers for B2B2C in Healthcare and Life Sciences Service Management Core](#)
3. [Assign the case viewer role for contacts in B2B2C in Healthcare and Life Sciences Service Management Core](#)
4. [Create a table for B2B2C in Healthcare and Life Sciences Service Management Core](#)
5. [Create a record producer for B2B2C in Healthcare and Life Sciences Service Management Core](#)
6. [Add a record producer to CSM portal for B2B2C in Healthcare and Life Sciences Service Management Core](#)

Install the Customer Data Models for B2B2C plugin for Healthcare and Life Sciences Service Management Core

Install the Customer Data Models for B2B2C plugin to enable customer data models for B2B2C with Healthcare and Life Sciences Service Management Core.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Definition > Plugins**.
2. Search for the Customer Data Models for B2B2C plugin using the filter criteria and search bar.
3. Click **Install**.

Configure the account consumer related list to add account consumers for B2B2C in Healthcare and Life Sciences Service Management Core

Configure the account consumer related list to add account consumers for use with B2B2C.

Before you begin

The Customer Data Models for B2B2C plugin must be installed. For more information, see [Install the Customer Data Models for B2B2C plugin for Healthcare and Life Sciences Service Management Core](#).

Role required: admin

Procedure

1. Navigate to **All > Customer Service > Customer > Accounts**.
2. Select an account.
3. Right-click within the account form and select **Configure > Related Lists**.
4. Move **Account Consumer -> Account** from the Available panel into the Selected panel.

Result

The Consumers related list is added to the accounts form.

What to do next

Assign the case viewer role for contacts. For more information, see [Assign the case viewer role for contacts in B2B2C in Healthcare and Life Sciences Service Management Core](#).

Assign the case viewer role for contacts in B2B2C in Healthcare and Life Sciences Service Management Core

Contacts must have the `sn_hcls.case_viewer` role for read access to healthcare case fields.

Before you begin

Configure the account consumer related list to add account consumers. For more information, see [Configure the account consumer related list to add account consumers for B2B2C in Healthcare and Life Sciences Service Management Core](#).

Role required: admin

Procedure

1. Navigate to **User Administration > Users**.
2. Select a user.
3. Click the Roles related list.
4. Click **Edit**.
5. Add **sn_hcls.case_viewer** to the roles list.

Result

Contacts now have read access to healthcare case fields for use with B2B2C.

What to do next

Create a table for use with B2B2C. For more information, see [Create a table for B2B2C in Healthcare and Life Sciences Service Management Core](#).

Create a table for B2B2C in Healthcare and Life Sciences Service Management Core

Create a table that extends the Healthcare case table.

Before you begin

Assign the case viewer role for contacts. For more information, see [Assign the case viewer role for contacts in B2B2C in Healthcare and Life Sciences Service Management Core](#).

Role required: admin

About this task

The Healthcare and Life Sciences Service Management Core case table must be extended in order for new cases to be created.

Procedure

1. Navigate to **System Definitions > Tables**.
2. Click **New**.
3. On the form, enter a label.
4. Set the **Extends table** field to the **Healthcare case** table.
5. In the Controls related list, add the **sn_customerservice.customer** user role.

Result

A table is created that extends the Healthcare case table for use with B2B2C.

What to do next

Create a record producer for use with B2B2C. For more information, see [Create a record producer for B2B2C in Healthcare and Life Sciences Service Management Core](#).

Create a record producer for B2B2C in Healthcare and Life Sciences Service Management Core

Create a record producer for use with B2B2C.

Before you begin

Create a table for use with B2B2C. For more information, see [Create a table for B2B2C in Healthcare and Life Sciences Service Management Core](#).

Role required: admin

Procedure

1. Navigate to **All > Service Catalog > Catalog Definition > Record Producers**.

2. Click **New**.

3. On the form, fill in the fields.

i Note: For details on the fields, refer to [Create a record producer](#).

4. Click **Save**, then re-open the record.

5. In the related links, do the following:

a. Navigate to **Variables** and click **New**.

i Note: For details on variables, refer to [Variables to collect data for record producer fields](#).

b. Add the following variables in **Type Specifications**:

Variables

| Variable | Type | Reference |
|-------------------|------------------|------------------|
| Account | Reference | customer_account |
| Contact | Reference | customer_contact |
| Consumer | Reference | csm_consumer |
| Short Description | Single Line Text | N/A |

c. In the Question related list for each variable, enter the following:

i. In **Question**, specify a question that explains the options available to the end user.

For example, for the Account variable, enter `Select the account`.

- ii. In **Name**, enter the variable being referenced.

For example, for the Account variable, enter account as the name.

- d. Click **Submit** and repeat for all variables as needed.
6. Navigate back to the record producer you created.
 - a. Navigate to **Available for** and add **SNC External** and **Users with sn_customerservice.customer**.
 - b. Navigate to **Not available for** and remove any values.
7. Click **Save**.

Result

The record producer is created.

What to do next

Add your record producer to the CSM portal. For more information, see [Add a record producer to CSM portal for B2B2C in Healthcare and Life Sciences Service Management Core](#).

[Add a record producer to CSM portal for B2B2C in Healthcare and Life Sciences Service Management Core](#)

Add a record producer to the CSM portal for use with B2B2C.

Before you begin

Create a record producer for use with B2B2C. For more information, see [Create a record producer for B2B2C in Healthcare and Life Sciences Service Management Core](#).

Role required: admin

Procedure

1. Navigate to **All > Service Portal > Portals**.
2. Select the Customer Support (CSM) portal.
3. Next to the CSM Header Menu, click the preview icon .
4. Click **Open Record**.
5. Under the Menu Items sections, navigate to Case and select **Preview Case > Open Record**.
6. Under the Menu Items sections, click **New** and fill in the fields.
 - a. Set the **Type** field to **Catalog Item**.
 - b. Set **Catalog item** to the record producer that you created previously.
 - c. For page, enter csm_get_help.
 - d. Enter the remaining fields as needed.
7. Click **Save**.

Result

Your record producer is added to the CSM portal.

Encryption options in Healthcare and Life Sciences Service Management Core

Healthcare and Life Sciences Service Management Core provides encryption support to secure sensitive information.

Encryption prevents unauthorized users from viewing sensitive healthcare data.

The Column Level Encryption Enterprise option on the Now Platform is supported in the Healthcare and Life Sciences Service Management Core application.

Column Level Encryption Enterprise

Column Level Encryption Enterprise provides an enhanced encryption capability compared to Encryption Support and utilizes the Key Management Framework (KMF).

When as an administrator, you install the Healthcare and Life Sciences Service Management Core application, the crypto modules and encryption configurations to encrypt sensitive fields along with the KMF are also installed automatically. For managing and auditing cryptographic operations on your ServiceNow instance, as an administrator, you can choose to optionally activate the Column Level Encryption Enterprise plugin (com.glide.now.platform.encryption). For more information about obtaining Column Level Encryption Enterprise, see [Activate Column Level Encryption Enterprise](#). For more information about selecting the parent crypto module, see [Create a cryptographic module](#).

Healthcare and Life Sciences Service Management Core encrypted fields

| Table | Field |
|----------------------|---------------------|
| sn_hcls_allergy | recorded_date |
| sn_hcls_allergy | onset_date |
| sn_hcls_allergy | onset_age |
| sn_hcls_claim_header | billed_drg_code |
| sn_hcls_claim_header | service_provider_id |
| sn_hcls_claim_header | name |
| sn_hcls_claim_header | payment_date |
| sn_hcls_claim_header | adjudicated_date |
| sn_hcls_claim_header | accepted_date |
| sn_hcls_claim_header | patient_account_no |

Healthcare and Life Sciences Service Management Core encrypted fields (continued)

| Table | Field |
|-----------------------------|--------------------|
| sn_hcls_claim_header | submitted_date |
| sn_hcls_claim_header | medical_record_no |
| sn_hcls_claim_line | service_start_date |
| sn_hcls_claim_line | original_tcn |
| sn_hcls_claim_line | service_end_date |
| sn_hcls_claim_line | ndc_code |
| sn_hcls_claim_line | tooth_code |
| sn_hcls_claim_line | revenue_code |
| sn_hcls_claim_line | line_title |
| sn_hcls_condition | recorded_date |
| sn_hcls_condition | onset_age |
| sn_hcls_condition | onset_date |
| sn_hcls_encounter | end_time |
| sn_hcls_encounter | start_time |
| sn_hcls_immunization | status_reason |
| sn_hcls_immunization | admin_date |
| sn_hcls_insurance_info_task | group_number |
| sn_hcls_insurance_info_task | rx_pcn |
| sn_hcls_insurance_info_task | member_number |

Healthcare and Life Sciences Service Management Core encrypted fields (continued)

| Table | Field |
|---------------------------------|---------------------|
| sn_hcls_insurance_info_task | rx_group |
| sn_hcls_insurance_info_task | rx_bin |
| sn_hcls_medication | reason_desc |
| sn_hcls_medication | status_reason |
| sn_hcls_medication | effective_date_time |
| sn_hcls_medication | reason_code |
| sn_hcls_medication | start_date |
| sn_hcls_medication | end_date |
| sn_hcls_medication_prescription | external_id |
| sn_hcls_medication_prescription | status_reason |
| sn_hcls_member_plan | group_number |
| sn_hcls_member_plan | rx_pcn |
| sn_hcls_member_plan | member_number |
| sn_hcls_member_plan | rx_group |
| sn_hcls_member_plan | rx_bin |
| sn_hcls_observation | observed_date |
| sn_hcls_patient | work_phone |
| sn_hcls_patient | name |
| sn_hcls_patient | birth_date |

Healthcare and Life Sciences Service Management Core encrypted fields (continued)

| Table | Field |
|----------------------|--------------------|
| sn_hcls_patient | occupation |
| sn_hcls_patient | middle_name |
| sn_hcls_patient | external_id |
| sn_hcls_patient | primary_email |
| sn_hcls_patient | secondary_email |
| sn_hcls_patient | address_line |
| sn_hcls_patient | family_name |
| sn_hcls_patient | marital_status |
| sn_hcls_patient | ssn |
| sn_hcls_patient | race |
| sn_hcls_patient | ethnicity |
| sn_hcls_patient | given_name |
| sn_hcls_patient | mobile_phone |
| sn_hcls_patient | home_phone |
| sn_hcls_patient | deceased_date_time |
| sn_hcls_patient | guarantor_id |
| sn_hcls_practitioner | secondary_email |
| sn_hcls_practitioner | name |
| sn_hcls_practitioner | external_id |

Healthcare and Life Sciences Service Management Core encrypted fields (continued)

| Table | Field |
|-------------------------|----------------------|
| sn_hcls_practitioner | family_name |
| sn_hcls_practitioner | mobile_phone |
| sn_hcls_practitioner | work_phone |
| sn_hcls_practitioner | given_name |
| sn_hcls_practitioner | birth_date |
| sn_hcls_practitioner | work_email |
| sn_hcls_practitioner | primary_email |
| sn_hcls_practitioner | home_phone |
| sn_hcls_pre_auth_header | date_fax_received |
| sn_hcls_pre_auth_header | date_fax_received |
| sn_hcls_pre_auth_header | primary_preath_num |
| sn_hcls_pre_auth_header | secondary_preath_num |
| sn_hcls_pre_auth_header | valid_from |
| sn_hcls_pre_auth_header | reason |
| sn_hcls_pre_auth_header | notes |
| sn_hcls_pre_auth_header | approved_date |
| sn_hcls_pre_auth_header | valid_to |
| sn_hcls_procedure | performed_date_time |

Setting up Workspace for addressing healthcare-related requests

Set up Healthcare workspace to enable healthcare agents to view patient information and manage healthcare-related cases.

Setting up Healthcare workspace for addressing healthcare requests tasks

| Task | Description |
|--|---|
| Configure patient information in Healthcare workspace. | Configure the Patient information related list in Healthcare workspace used by healthcare agents. |
| Display patient information on a healthcare case. | Enable healthcare agents to view relevant patient information within a healthcare case. |

Note: For more information about the tasks required for setting up Healthcare workspace for agents, see [Setting up your Configurable Workspace](#).

Configuring patient information in Healthcare workspace

You can configure the Patient information related list in Healthcare workspace used by healthcare agents.

Healthcare workspace used by healthcare agents is a CSM Configurable Workspace. As a user with the admin role, you can configure the Patient information related list by using UI Builder. For more information, see [Explore CSM Configurable Workspace](#).

By default, patient information is displayed on interactions associated with patients. You can configure the CSM Configurable Workspace to display patient information for a healthcare case. Also, you can configure the Patient information related list for a specific healthcare case and user role. For more information, see [Displaying patient information on a healthcare case type in Healthcare workspace](#).

Displaying patient information on a healthcare case type in Healthcare workspace

Improve agent efficiency and the quality of patient interactions by enabling healthcare agents to view relevant patient information within a case that extends the healthcare case type.

By default, patient information is displayed on interaction records associated with patients. You can configure the CSM Configurable Workspace to display patient information for a case that extends the healthcare case type.

Configurations tasks for displaying patient information on a healthcare case

| Task | Description |
|-----------------------------------|--|
| Extend the healthcare case table. | Extend the Healthcare case [sn_hcls_case] table to create a case type for viewing patient information within healthcare-related cases. |

Configurations tasks for displaying patient information on a healthcare case (continued)

| Task | Description |
|--|---|
| Set up the interaction form to create healthcare cases. | Add a create case UI action to enable agents to create a healthcare case from an interaction. |
| Create ACL rules for the extended Healthcare case table. | Create access control list (ACL) rules to enable appropriate users and applications to access healthcare cases. |

Extend the healthcare case table

Extend the Healthcare case [sn_hcls_case] table to create a case type for viewing patient information within healthcare-related cases.

Before you begin

Set the application scope to Healthcare and Life Sciences Service Management Core using the application picker. For more information, see [Application picker](#).

Role required: sn_hcls.admin

Procedure

1. Navigate to **All > System Definition > Tables**.
2. In the Tables list, click **New**.
3. Fill in the details of the new table record.
For more information, see [Create a table](#).
4. In the **Extends Table** field, click the lookup icon  and search for and select the sn_hcls_case table.
5. Click **Submit**.

Configuring interactions for healthcare case types

You can add a create case UI action to enable agents to create a healthcare-related case from an interaction.

By default, a UI action to create a case from an interaction is not available. As an administrator, you can create a UI action for creating healthcare-related cases and add the UI action to the Interaction form. For more information, see [Create a UI action](#).

Note: Agents use CSM Configurable Workspace for resolving healthcare cases. To use UI actions in CSM Configurable Workspace, each UI action must have a corresponding form action. For more information, see [Set up a form action in CSM Configurable Workspace](#).

Creating ACL rules for accessing healthcare cases

You can create access control list (ACL) rules to enable users and applications to access healthcare cases.

As a user in the sn_hcls.admin role, manage access to the tables extended from the Healthcare case [sn_hcls_case] table by creating ACL rules. For more information, see [Create an ACL rule](#).

Note: The Healthcare case [sn_hcls_case] table and its extended tables are within the Healthcare and Life Sciences Service Management Core scoped application. To create ACL rules for the healthcare case tables, you must follow the [access control rules in application administration apps](#).

Managing healthcare-related requests in Workspace

As a healthcare agent, you can use Healthcare workspace to accept requests from patients via chat or a phone call and view patient-related information.

Healthcare workspace managing tasks

| Task | Description |
|--|--|
| Access the Workspace landing page. | Use the landing page in Workspace to quickly scan and access healthcare cases. |
| Respond to a healthcare request. | Accept a work item and use an interaction record to respond to a healthcare request. |
| Associate a patient record with an interaction in Workspace. | Look up for the patient information within an interaction, review and confirm the information, and then populate the information on the interaction to resolve a healthcare-related request. |
| View patient information in Workspace. | View the details of a patient in Healthcare workspace. |

Viewing the landing page for healthcare-related cases in Workspace

As a healthcare agent, you can use the landing page of Workspace to quickly scan and access healthcare-related cases.

The landing page of healthcare-related cases in Workspace provides an overview of your new, assigned, and high priority healthcare cases and the healthcare cases assigned to your groups.

Healthcare-related cases Workspace landing page

now All Favorites History : CSM/FSM ... JH

Home +

Hello, John!

Get a little help monitoring your work with your personal home page.

Important items

Check these metrics to see the most important items to work on.

| | | | |
|----------------------------|-------------------------|----------------|-----------------------|
| 25 High-priority cas... | 0 Not updated in ... | 0 Case task | 4 Unassigned cases |
|----------------------------|-------------------------|----------------|-----------------------|

Cases

Track your active cases and the cases your team is working on.

By case types

| Case Type | Count |
|-------------------|-------|
| Procedure request | 21 |
| Enrollment case | 17 |

By priority

| Priority Level | Count |
|----------------|-------|
| 2 - High | 19 |
| 1 - Critical | 15 |
| 4 - Low | 4 |

My active cases 51

Last refreshed 2m ago.

| Number | Short description ▲ | State | Priority | Channel | As |
|-------------|---------------------------------|-------|--------------|---------|-----|
| PSS00001032 | Medqua Together Enrollment Case | Open | 1 - Critical | Web | hc |
| PSS00001040 | Medqua Together Enrollment Case | Open | 2 - High | Web | hc |
| PSS00001017 | Medqua Together Enrollment Case | Open | 1 - Critical | Web | (e) |
| PSS00001035 | Medqua Together Enrollment Case | Open | 1 - Critical | Web | hc |
| PSS00001038 | Medqua Together Enrollment Case | Open | 2 - High | Web | hc |

[View all](#) 63

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Accessing and using the landing page

To access the Workspace for healthcare-related cases, navigate to **All > HCLS Service Management > Healthcare workspace**.

The Workspace landing page includes components that display healthcare case information, plus visualizations that further break down the component data. Each visualization is connected to a data source. For example, the By priority component includes visualizations for P1 and escalated cases.

From the landing page of Workspace, agents can:

- View the case information presented in each component.
- Drill into each component to see the case list behind the single score.
- Navigate to individual records from the case lists.

Viewing data

By default, the Workspace displays data in the following sections:

- [Important items](#)
- [Cases](#)
- [My active cases](#)

i Note: Your administrator can customize the landing page for Workspace and change the data that appears on it.

Important items

The Important items section shows metrics including high-priority cases, cases not updated in more than three days, tasks associated with the cases, and unassigned cases for the agent to monitor and work on.

Cases

The Cases section shows donut charts for case types and case priority assigned to you. By default, the data in the charts is displayed only when the assignment group that you belong to is associated with the case. Monitor this section to make sure that high-priority healthcare cases are resolved quickly.

My active cases

The My active cases section shows a list of all open healthcare-related cases that are assigned to you.

i Note:

The Workspace landing page for healthcare-related cases is same as the CSM Configurable Workspace landing page. Therefore, you might see additional information based on the configuration set up by your administrator. For more information, see [CSM Configurable Workspace landing page](#).

Responding to healthcare requests

As a healthcare agent, you can respond to healthcare requests to resolve issues raised by a patient.

Patients can submit a healthcare request via a phone call or a chat. As a healthcare agent, you can respond to healthcare requests by accepting a work item from a patient or

accessing the interaction records that store work items. For more information, see [Interaction Management](#).

Associate a patient record with an interaction in Workspace

Look up for the patient information within an interaction, review and confirm the information, and then populate the information on the interaction to resolve a healthcare-related request.

Before you begin

Role required: sn_hcls.healthcare_agent, sn_hcls.manager

About this task

The **Consumer** field on the Interaction form is automatically populated with the requester's name who requested for assistance made through a chat or phone call. As an agent, you can associate an interaction with the correct patient. You can search for the patient from within an interaction and verify the details with the requester to confirm you have the right patient details.

Procedure

1. Open your Workspace by navigating to **All > HCLS Service Management > Healthcare workspace**.
2. Navigate to **Lists > Interactions > My Interactions**.
3. Click the link to the interaction with which you want to associate a patient record.
4. On the Interaction form, click **Verify Patient**.
5. In the **Lookup by name, phone, or record number** field of the Verify Patient dialog box, enter the patient data.
You can search for the patient by their name, phone number, email address, date of birth, or MRN. The **Lookup by name, phone, or record number** field uses a type-ahead search feature that displays results in a list and narrows the results as more characters are entered. Multiple display fields in the search results help to differentiate patients. When searching for a record number, the patient associated with the record is returned in the search results. To clear the search results, delete characters in the **Lookup by name, phone, or record number** field.

Note: The type-ahead search feature works only when the encryption feature is disabled. If the encryption feature is enabled, you must enter the exact keyword as the first name, last name, phone number, email address, date of birth, or MRN to find the patient record.

6. In the Verify Patient dialog box, click **Done**.
7. On the Interaction form, click **Save**.

Result

The Patient information related list is displayed on the interaction form from where you can view the details of the patient. The Patient information related list is also displayed on the healthcare cases associated with the interaction.

Create a patient record in Workspace

Create a patient record from within an interaction in Workspace.

Before you begin

Role required: sn_hcls.healthcare_agent, sn_hcls.manager

Procedure

1. Open your Workspace by navigating to **All > HCLS Service Management > Healthcare workspace**.
2. Navigate to **Lists > Interactions > My Interactions**.
3. Click the link to the interaction with which you want to associate a patient record.
4. On the Interaction form, click **Create Patient**.
5. Fill in the details for the new patient.
6. Optional: Add an attachment related to the patient by clicking **Browse** in the Attachments panel.
7. Click **Save**.

Result

The patient record is created. You can then verify the patient to associate the patient record with the interaction. For more information, see [Associate a patient record with an interaction in Workspace](#).

Viewing patient information in Workspace

With the 360-degree view of a patient in Workspace, you can access the patient details anytime for any healthcare services.

The Patient information related list in Workspace provides several details about a patient enabling 360-degree view of the patient. The related list is displayed on the Interaction and Healthcare Case forms.

- i Note:** Your administrator can configure the Workspace to modify the patient information by using UI Builder. This topic discusses the default view for the patient information. For information about UI Builder, see [UI Builder](#).

Patient information

The screenshot shows the ServiceNow Healthcare Workspace interface for a patient named Gilly Wood. The top navigation bar includes 'servicenow' and 'Healthcare Workspace'. The left sidebar has a user icon and a search bar. The main content area is titled 'Gilly Wood' and includes sections for Overview, Details, Member Plans (2), Appointments (4), Encounters (2), Procedures (2), Immunizations (4), Medications (2), and More.

Overview:

- Personal Information:** MRN 123 674 9999, SSN XXX XXXX 9999, Cell phone +1 798 282 7777, Home phone +1 798 282 7777, Email g.wood@mailinator.com, Home Address 1234 Helathy Street, Santa Clara, CA 94555.
- Insurance details:** United Healthcare, Group Number GRP-4523-000, Company Code CC-X34D-000, Member ID MM-E452-000.
- Household members:** Jack Warren (Spouse, Emergency Contact), Jill Warren (Daughter), Jose Warren (Son).

Health Conditions: 3 Health conditions.

Medications: 6 Medications.

Active Allergies: 3 Active allergies.

Recent Immunizations: 6 Recent immunizations.

Cases overview: A donut chart showing the status of cases: Complete (13), Pending (13), Rejected (13), and New (13).

Claims overview: A donut chart showing the status of claims: Complete (15), Pending (5), Rejected (13), and New (8).

Recent Interactions: 5 interactions last updated 2h ago. Includes entries for IMS0000192, IMS0000193, IMS0000194, and IMS0000194.

Appointments: 5 appointments last updated 2h ago. Includes entries for CS0000192, CS0000193, CS0000194, and CS0000194.

Patient information displayed in Workspace

| Details | Description |
|-------------------|--|
| Personal details | Personal details of the patient including the name, date of birth, social security number (SSN), home phone number, email ID, and home address. |
| Insurance details | Insurance details of the patient including the member number, effective from date, RxBin number, RxGroup number, group number, effective to date, RxPCN number, and subscriber name. |
| Household members | Members of the household associated with the patient. Click the member name or responsibility to view the household member relationship details with the patient. |
| Conditions | Number of health conditions observed in the patient. Click the number to view a list of conditions associated with the patient. |
| Medications | Number of medications taken by the patient. Click the number to view a list of medications associated with the patient. |
| Allergies | Number of allergies observed in the patient. Click the number to view a list of allergies associated with the patient. |

Patient information displayed in Workspace (continued)

| Details | Description |
|---------------------|--|
| Immunizations | <p>Number of vaccines administered for the patient.</p> <p>Click the number to view a list of immunizations associated with the patient.</p> |
| Cases overview | <p>Donut chart displaying healthcare cases associated with the patient by status.</p> <p>Click a status slice to view a list of cases in that status.</p> |
| Claims overview | <p>Donut chart displaying claims associated with the patient by status.</p> <p>Click a status slice to view a list of claims in that status.</p> |
| Recent interactions | <p>List of interactions that have been created for the patient.</p> <p>Click an interaction number to view more details about the interaction.</p> |
| Appointments | <p>List of appointments scheduled for the patient.</p> <p>Click an appointment number to view more details about the appointment.</p> |
| Record Information | Contextual side panel used for viewing an overview of a patient record, the case timeline, and the time remaining out of the total SLA time associated with the healthcare case. |
| Agent assist | Contextual side panel used for searching for cases from an interaction. By default, the available search sources include healthcare cases. |

Case summarization using Now Assist

Generate a case summary and quickly understand the case context by using the case summarization skill in Now Assist.

The Healthcare and Life Sciences Service Management Core application leverages the generative AI capabilities of Now Assist from Customer Service Management to provide case summarization within Workspace.

Case summarization provides you with a concise summary of any type of HCLS case which includes the case issue, actions taken, and resolution details. This skill allows you to do the following:

- Generate an initial summary of a case so that you can understand the case context.
- Summarize all the work that has been done on a case.

Access to case summarization can be granted to HCLS users by either of the following roles:

- sn_customerservice_agent
- sn_customerservice.consumer_agent

Now Assist can be configured for any type of HCLS case.

Using case summarization in HCLS

The screenshot shows a ServiceNow HCLS case summary page. At the top, there's a navigation bar with 'servicenow' and various links like 'All', 'Favorites', 'History', 'Workspaces', and 'Admin'. A search bar says 'CSM/FSM Configurable...'. Below the header, the case number 'DEVCS0001001' is displayed. The main content area has tabs for 'Overview', 'Details', and 'Related Lists'. The 'Overview' tab is selected, showing a summary box with 'Medical device case summary by Now Assist' and a 'Summarize' button. The 'Request details' section includes fields for 'Opened by' (empty), 'Opened' (2023-12-05 21:37:18), 'Issue type' (Electrical issue), 'Organization' (Solana Hospital Div), 'Product' (ACME Corporation GEN 200 Crosser Generator), and 'Short description' (Experiencing critical issues with ventilator functionality; immediate assistance required). The 'Device details' section shows a thumbnail of a medical device, the name 'ACME Corporation GEN 200 Crosser Generator 001-0001', manufacturer 'ACME Corporation', serial number '001-0001', and installed date '2023-12-04'. To the right, the 'Compose' panel has tabs for 'Comments' (selected) and 'Work Notes'. It contains a text area for comments, a note that 'Everyone can see this comment', and a 'Post Comments' button. The 'Activity' panel shows two entries: one from 'maint' about erratic pressure fluctuations, and another from 'maint' about field changes. Both entries include details like state, impact, and priority.

The case summary panel is displayed on the Overview tab.

Click Summarize to generate a summary based on the following field inputs:

- Short description
- Description
- Work notes
- Additional comments

The screenshot shows the ServiceNow CSM interface with a case summary panel. The panel includes sections for 'Request details' (opened by maint on 2023-12-05 21:37:18, issue type Electrical issue, product ACME Corporation GEN 200 Crosser Generator), 'Device details' (ACME Corporation GEN 200 Crosser Generator 001-0001, manufacturer ACME Corporation), and a summary message: 'Experiencing critical issues with ventilator functionality; immediate assistance required.' A 'Compose' section allows users to add comments or work notes. An 'Activity' section shows a recent update from 'maint' on 2023-12-05 21:50:32.

The summary displays in the case summary panel once generated. Users can give feedback and share the summary to their work notes.

i Note: UI Builder can be used to configure the placement of the Case Summary panel within the HCLS case form. For more information, see [Configure UI Builder workspace experiences](#).

For more information on using this capability, see [Summarize a case by using Now Assist for Customer Service Management \(CSM\)](#).

For information on how to configure Now Assist to use the case summarization skill, see [Configure Now Assist for Customer Service Management \(CSM\)](#).

Using the Patient Portal for Healthcare and Life Sciences Service Management

You can use the Patient Portal available with the Healthcare and Life Sciences Service Management application to access your healthcare information from anywhere.

As a user with the sn_hcls.patient role, you can access the Patient Portal page by [registering yourself on the Patient Portal](#). To begin with the Patient Portal, you might need to first accept the privacy policy of your healthcare organization and then [enter the key personal information](#).

From the Patient Portal, you can request healthcare services, complete your to-do tasks, and receive notifications to provide the required approval or information. You can also check the healthcare information about your household members.

Patient Portal page

Depending on the configurations set by your administrator, as a patient, you can perform the following tasks from the Patient Portal:

View the reminder for the next appointment

View the reminder for your next upcoming appointment on the Patient Portal page. You can view the appointment details by clicking **View details** next to the reminder on the Patient Portal page.

View and complete to-dos

Review and sign documents and other tasks including review and add or update insurance information from your to-dos list. You can view all the pending and closed to-do items by clicking **View all** in the Pending to-dos section of the Patient Portal page.

View requests

View open requests including healthcare cases associated with you and your authorized household members. You can click a request to view the status and other details, attach documents, and post comments. You can view all the pending and closed requests by clicking **View all** in the Open requests section of the Patient Portal page.

View suggested vaccinations and schedule them

View suggested vaccinations that you can schedule for yourself. Depending on the Patient Portal settings configured by your portal administrator, you can schedule the vaccinations suggested for you from the Vaccinations section of the Patient Portal home page by clicking **Schedule vaccination**. On the Schedule your vaccination form select the vaccination, site, and slot details.

i Note: The Vaccinations section appears only when your administrator has installed the Vaccine Administration Management application. For more information, see [Using Vaccine Administration Management](#).

View the COVID-19 vaccination status

View the COVID-19 vaccination status for yourself when the Vaccine Administration Management (VAM) is installed.

i Note: The COVID-19 vaccination status section appears only when your administrator has installed the Vaccine Administration Management application. For more information, see [Using Vaccine Administration Management](#).

View household members

View your household members and their details including their upcoming appointments, to-do items, number of pending vaccinations, and open requests.

View appointments

View your upcoming and past appointments and their details.

Request healthcare services

Submit requests for healthcare services including enrollment and procedure requests when the Patient Support Services and Pre-Visit Management applications are installed.

Access self-service resources

Interact with Virtual Agent to resolve your healthcare queries, check the status of your requests, or seek any other information.

Access articles and frequently asked questions

Access knowledge articles and frequently asked questions relevant to your health.

The Patient Portal home page also provides menu options for viewing and scheduling your appointments, viewing your open and closed to-do items and healthcare requests, and requesting healthcare services.

Registering on the Patient Portal

As a patient, you can create an account on a patient portal to avail your healthcare services online including scheduling your vaccinations.

Depending on your portal settings, you can register yourself as a patient on the Patient Portal by clicking **Create account** on the Patient Portal landing page and then providing your information on the registration form. After you submit your information, a verification link with instructions for the next step is emailed to you automatically. You can then confirm your account settings to start logging in to and using the Patient Portal.

Entering key personal information on the Patient Portal

As a patient, after you have registered on your Patient Portal, you can provide your personal information to help organizations determine your healthcare services.

Key personal information is required by healthcare providers for various purposes including determining the scheduling of your vaccinations.

Healthcare and Life Sciences Service Management Core reference

Reference topics provide additional information about Healthcare and Life Sciences Service Management Core components, including tables.

Components installed with Healthcare and Life Sciences Service Management Core

Several types of components are installed with installation of the Healthcare and Life Sciences Service Management Core application, including user roles, tables, plugins, ServiceNow Store applications, and business rules.

i Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see [Find components installed with an application](#).

Demo data is available for this feature.

Roles installed

Healthcare and Life Sciences Service Management Core roles

| Role | Description | Contains roles |
|--------------------------|--|--|
| sn_hcls.admin | Administers who can access sensitive data by restricting how users acquire roles in the Healthcare and Life Sciences applications. | <ul style="list-style-type: none"> • decision_table_admin • sn_doc.admin • sn_hcls.manager • sn_previsit.admin |
| sn_hcls.case_task_viewer | Grants access to view tasks associated with healthcare cases. | None |
| sn_hcls.case_viewer | Grants access to view healthcare cases. | None |

Healthcare and Life Sciences Service Management Core roles (continued)

| Role | Description | Contains roles |
|--------------------------------|---|--|
| sn_hcls.clinical_data_viewer | Views details of the clinical data such as immunization and procedure. | None |
| sn_hcls.clinical_data_writer | Edits details of the clinical data such as immunization and procedure. | sn_hcls.clinical_data_viewer |
| sn_hcls.consumer_agent | Creates, views, and edits healthcare cases and works with consumers to resolve cases. | <ul style="list-style-type: none"> • sn_hcls.healthcare_agent • sn_customerservice.consumer_agent |
| sn_hcls.customerservice_agent | Creates healthcare cases for an account and contact as a customer service agent. | <ul style="list-style-type: none"> • sn_hcls.healthcare_agent • sn_customerservice_agent |
| sn_hcls.data_access_user | Grants data access rights to the users who need dedicated access to certain sensitive healthcare data. | <ul style="list-style-type: none"> • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.health_insurance_data_viewer • sn_hcls.revenue_cycle_data_viewer |
| sn_hcls.device_data_viewer | Views details of the device. | None |
| sn_hcls.device_data_writer | Creates, deletes, and updates the device data. | sn_hcls.device_data_viewer |
| sn_hcls.employee_patient | Grants access to the users with the snc_internal role to healthcare data and healthcare cases when authorized to view them. | <ul style="list-style-type: none"> • sn_customerservice.self_contributor • sn_vaccine_sm.user • sn_hcls.data_access_user |
| sn_hcls.foundation_data_viewer | Views details of the foundation data such | None |

Healthcare and Life Sciences Service Management Core roles (continued)

| Role | Description | Contains roles |
|--------------------------------------|--|--|
| | as organization and healthcare location. | |
| sn_hcls.foundation_data_writer | Edits details of the foundation data such as organization and healthcare location. | sn_hcls.foundation_data_viewer |
| sn_hcls.healthcare_agent | Accesses and views healthcare data related to patients as a contact center agent. | <ul style="list-style-type: none"> • canvas_user • sn_customerservice.csm_workspace_viewer • sn_customerservice.customer_data_viewer • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.health_insurance_data_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.report_viewer • sn_hcls.revenue_cycle_data_viewer |
| sn_hcls.health_insurance_data_viewer | Views details of the health insurance data such as member plan and payer plan. | None |
| sn_hcls.health_insurance_data_writer | Edits details of the health insurance data such as member plan and payer plan. | health_insurance_data_viewer |
| sn_hcls.manager | Manages who can perform create, read, update, and delete (CRUD) operations on healthcare objects within a ServiceNow instance. In addition, creates and manages accounts, contact, account relationships, contact relationships, and account consumer relationships. | <ul style="list-style-type: none"> • canvas_user • model_manager • sn_customerservice.csm_workspace_viewer • sn_customerservice.customer_data_viewer • sn_hcls.clinical_data_writer • sn_hcls.foundation_data_writer • sn_hcls.health_insurance_data_writer • sn_hcls.patient_data_writer • sn_hcls.practitioner_data_writer • sn_hcls.report_viewer |

Healthcare and Life Sciences Service Management Core roles (continued)

| Role | Description | Contains roles |
|-----------------------------|--|---|
| | | <ul style="list-style-type: none"> • sn_hcls.revenue_cycle_data_writer • sn_previsit.patient_service_agent |
| sn_hcls.patient | <p>Views own records including healthcare cases, addresses, patient data, and clinical data as a patient. Also, views the records of other patients including their addresses for whom they are the authorized representative. Adds comments to their healthcare cases and for whom they are the authorized representative. Views their household members, if any.</p> <p>Household members and addresses associated with a patient are maintained by using the Household Member [csm_household_member] and Location [cmn_location] tables, respectively. For more information about household members and their relationships, see Industry data model households. Location is associated with the foundation domain in the Common Service Data Model (CSDM).</p> | <ul style="list-style-type: none"> • sn_customerservice.consumer • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.health_insurance_data_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.revenue_cycle_data_viewer |
| sn_hcls.patient_data_viewer | Views details of the patient data such as patient and policy consent. | None |
| sn_hcls.patient_data_writer | Edits details of the patient data such as patient and policy consent. | sn_hcls.patient_data_viewer |

Healthcare and Life Sciences Service Management Core roles (continued)

| Role | Description | Contains roles |
|-----------------------------------|---|--|
| sn_hcls.practitioner | Accesses and views healthcare data related to patients as a healthcare practitioner (a triage nurse or clinical coordinator). | <ul style="list-style-type: none"> • sn_customerservice.customer_data_viewer • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.health_insurance_data_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.report_viewer • sn_hcls.revenue_cycle_data_viewer |
| sn_hcls.practitioner_data_viewer | Views details of the practitioner data such as practitioner and practitioner facility. | None |
| sn_hcls.practitioner_data_writer | Edits details of the practitioner data such as practitioner and practitioner facility. | sn_hcls.practitioner_data_viewer |
| sn_hcls.report_viewer | Views reports generated from tables for which they have access as agents or managers. | None |
| sn_hcls.revenue_cycle_data_viewer | Views details of the revenue cycle data such as claims. | None |
| sn_hcls.revenue_cycle_data_writer | Edits details of the revenue cycle data such as claims. | sn_hcls.revenue_cycle_data_viewer |

Tables installed

Healthcare and Life Sciences Service Management Core application tables

| Table | Description |
|---------------------------------------|--|
| Allergy intolerance [sn_hcls_allergy] | Stores the information about a clinical assessment of an allergy or intolerance; a propensity, or a potential risk to an individual. |

Healthcare and Life Sciences Service Management Core application tables (continued)

| Table | Description |
|---|---|
| | to have an adverse reaction on future exposure to the specified substance, or class of substance. |
| Appointment [sn_hcls_appointment] | Stores the appointment booking details for a patient in your healthcare organization. |
| Appointment participant [sn_hcls_appointment_participant] | Stores the participant details of an appointment. |
| Attribute [sn_hcls_characteristic_attribute] | Stores the characteristics options associated with a program or program service selected by a patient when submitting a healthcare request. |
| Book appointment [sn_hcls_book_appt_task] | Stores the task details for booking an appointment associated with a healthcare case or its extended case types. |
| Claim diagnosis [sn_hcls_claim_diagnosis] | Stores diagnosis information for claims. |
| Claim header [sn_hcls_claim_header] | Stores the details of the main claim submitted on behalf of a patient to a payer organization. |
| Claim line [sn_hcls_claim_line] | Stores the details of the items pertaining to a claim header. |
| Medical device install base item [sn_hcls_medical_device_install_base_item] | Stores the details of medical devices as install base items. |
| Condition [sn_hcls_condition] | Stores the information about a condition, problem, diagnosis, or other event, situation, issue, or clinical concept that has risen to a level of concern. |
| Dosage definition [sn_hcls_dosage_definition] | Models the Dosage specification [sn_hcls_dosage_specification] table for use as a request definition parameter. |
| Dosage specification [sn_hcls_dosage_specification] | Stores the information about medication product dosage associated with a program. |

Healthcare and Life Sciences Service Management Core application tables (continued)

| Table | Description |
|---|---|
| Dosage variable [sn_hcls dosage variable] | Stores the variables configured for a dosage specification displayed on the Medication Prescription form of a Healthcare and Life Sciences Service Management application. |
| Encounter [sn_hcls_encounter] | Stores the information about an interaction between a patient and healthcare providers for providing healthcare services or assessing the health status of a patient. |
| Enrolled Program [sn_hcls_enrolled_program] | Stores the programs that a patient has been enrolled into |
| Enrolled Program Service [sn_hcls_enrolled_program_service] | Stores the program services provided to a patient as part of a program enrollment process. |
| Healthcare case [sn_hcls_case] | Stores healthcare-related cases. i Note: The Healthcare case [sn_hcls_case] table is an abstract table and is extendable. |
| Healthcare code set [sn_hcls_code_set] | Stores the details of code sets available in your ServiceNow instance. |
| Healthcare location [sn_hcls_location] | Stores details of the location associated with your healthcare organization. |
| Healthcare organization [sn_hcls_organization] | Stores the details of a healthcare organization in your ServiceNow instance. |
| Healthcare sold product [sn_hcls_sold_product] | Stores the healthcare products sold to an account or consumer. |
| Healthcare Task [sn_hcls_task] | Stores the details of the task associated with a healthcare case or a patient in your healthcare organization. i Note: The Healthcare Task [sn_hcls_task] is an abstract table and is extendable. |

Healthcare and Life Sciences Service Management Core application tables (continued)

| Table | Description |
|--|--|
| Immunization [sn_hcls_immunization] | Stores the information about an event of a patient being administered a vaccine or a record of an immunization as reported by a patient, a clinician, or another party. |
| Medication [sn_hcls_medication] | Stores the information about a medication for the purposes of prescribing, dispensing, and administering a medication as well as for making statements about medication use. |
| Medication Prescription [sn_hcls_medication_prescription] | Stores the information about prescriptions ordered for a patient. |
| Medication product model [sn_hcls_medication_product] | Stores the information about substances that are used to treat diseases, to relieve complaints, or to prevent such diseases or complaints in the first place. |
| Member Plan [sn_hcls_member_plan] | Stores the details of a health insurance plan associated with a patient. |
| Observation [sn_hcls_observation] | Stores the information about measurements and simple assertions made about a patient. |
| Patient [sn_hcls_patient] | Stores the details of a patient in your healthcare organization. |
| Practitioner [sn_hcls_practitioner] | Stores the details of a practitioner in your healthcare organization. |
| Policy [sn_hcls_policy] | Stores the details of a policy shared with patients in the Healthcare and Life Sciences applications. |
| Policy consent [sn_hcls_policy_consent] | Stores the details of a consent accepted by a patient or a household member on behalf of the patient. |
| Practitioner location [sn_hcls_practitioner_facility] | Stores the details of the location at which a practitioner provides healthcare services. |

Healthcare and Life Sciences Service Management Core application tables (continued)

| Table | Description |
|---|---|
| Practitioner location specialty [sn_hcls_pract_location_specialty] | Stores the details about types of services that a practitioner can provide for an organization at a specific location. |
| Practitioner specialty [sn_hcls_practitioner_specialty] | Stores the association details of a specialty with a practitioner. |
| Pre-authorization diagnosis [sn_hcls_pre_auth_diagnosis] | Stores diagnosis information pertaining to a pre-authorization for healthcare services. |
| Pre-authorization item [sn_hcls_pre_auth_item] | Stores the details of items pertaining to a pre-authorization request for healthcare services. |
| Pre-authorization request [sn_hcls_pre_auth_header] | Stores the authorization request details for a healthcare service provided by a payer organization. |
| Procedure [sn_hcls_procedure] | Stores the information about an action that is or was performed on or for a patient. An action can be a physical intervention like an operation, or less invasive like long-term services, counseling, or hypnotherapy. |
| Program [sn_hcls_program] | Stores the programs offered by healthcare organizations. |
| Program relationship [sn_hcls_program_relationship] | Stores the association details between a program and program service. |
| Program service [sn_hcls_program_service] | Stores the program services associated with a program. |
| Source system [sn_hcls_source_system] | Stores the source and destination IDs of an external healthcare system in your ServiceNow instance. |
| Update insurance information [sn_hcls_insurance_info_task] | Stores the task details for updating the insurance information of a patient in your healthcare organization. |
| Vaccine product [sn_hcls_vaccine_product] | Stores the models of all the supported vaccine products. |

Plugins installed

Healthcare and Life Sciences Service Management Core plugins

| Plugin | Description |
|---|---|
| Encryption Support plugin (com.glide.encryption) | Encrypts table columns and attachments associated with an EMR system in the Healthcare and Life Sciences applications. |
| Business Location plugin (com.snc.business_location) | Enables you to create an organizational structure that includes Healthcare locations. |
| Customer Service Install Base Management plugin (com.snc.install_base) | Captures the install base for a customer by creating sold products, install base items, and installed products to enable customer service agents to easily trace issues back to the right product, instances of that product, and other entities that might impact their functioning. |
| Document Templates plugin (com.snc.document_templates) | Enables you to create HTML and PDF document templates to generate standard letters or documents. |
| Customer Service Household plugin (com.snc.household) | Enables you to create households, define the members of a household, and identify relationships between household members. |
| Playbook Experience Core (com.glide.playbook_experience.config) | Enables you to visualize and interact with business process workflows in a simple, task-oriented view. |

ServiceNow Store applications installed

Healthcare and Life Sciences Service Management Core Store application installed

| App | Description |
|--|--|
| Playbook Experience Components (now_playbook_exp) | Enables you to access Playbook Experience Components for viewing and interacting with process executions in UI Builder pages and Healthcare Workspace. |
| Playbook Experience (sn_playbook_exp) | Enables you to view and interact with business process workflows in real time. |

Healthcare and Life Sciences Service Management Core Store application installed (continued)

| App | Description |
|---|---|
| Playbooks for Customer Service Management (sn_csm_playbook) | Enables the CSM Configurable Workspace playbook experience. |
| Product Catalog Management Core (sn_prd_pm) | Includes the base product catalog data model and functionality to define product, services, and resource specifications, and product offerings based on those specifications |
| Industry Core (com.sn_ind) | Includes common objects, code artifacts, and request definitions for industry vertical applications. |
| CIWF UI Components (sn_ciwf_ui_cmplt) | Includes common themes, widgets, and code artifacts for customer and industry workflow applications. |
| CMDB CI Class Models | Includes class models for medical devices that extend the CMDB class hierarchy, including class descriptions, identification rules, identifier entries, and dependent relationships, if applicable. |

Scheduled jobs installed

Healthcare and Life Sciences Service Management Core scheduled jobs installed

| Scheduled job | Description |
|---|---|
| Set inactive status for expired policy consents | Sets the status of policy consents to inactive when the policy validity duration has expired. |

Business rules installed

Healthcare and Life Sciences Service Management Core business rules installed

| Business rule | Table | Rule criteria | Description |
|------------------------|--|---------------|--|
| Add/Update member plan | Update insurance information [sn_hcls_insurance_info_task] | After update | Updates the member plan when the payment type is set to insurance. |

**Healthcare and Life Sciences Service Management Core business rules installed
(continued)**

| Business rule | Table | Rule criteria | Description |
|--|--|--------------------------|---|
| Autofill name | Practitioner [sn_hcls_practitioner] | Before insert and update | Fills the Name field value from the prefix, given name, family name, or suffix field when the Name field in the Practitioner [sn_hcls_practitioner] table is not set. |
| Clear insurance if patient opts self pay | Update insurance information [sn_hcls_insurance_info_task] | Before update | Updates the payer field when the payment type is set to self-pay. |
| Create consumer for patient if not set | Patient [sn_hcls_patient] | After insert | Creates the consumer record after a patient is created and sets the Consumer field from the patient record and associates the consumer with the patient. |
| Create dosage definition | Dosage specification [sn_hcls_dosage_specification] | Before insert and update | Creates a dosage definition for a dosage specification. |
| Create dosage variables | Dosage specification [sn_hcls_dosage_specification] | Before insert and update | Creates dosage variables for specification characteristics. |
| Patient access to allergy table | Allergy intolerance [sn_hcls_allergy] | Before query | Runs the <code>Allergies - authorized to view</code> before query when a patient queries the Allergy intolerance [sn_hcls_allergy] table in the list or form view. |
| Patient access to appointment table | Appointment [sn_hcls_appointment] | Before query | Runs the <code>Allergies - authorized to view</code> before query when a patient queries the Allergy intolerance [sn_hcls_allergy] table in the list or form view. |
| Patient access to case table | Healthcare case [sn_hcls_case] | Before query | Runs the <code>Healthcare cases - authorized to view</code> before query when a patient queries the Healthcare |

**Healthcare and Life Sciences Service Management Core business rules installed
(continued)**

| Business rule | Table | Rule criteria | Description |
|--------------------------------------|-------------------------------------|---------------|---|
| | | | case [sn_hcls_case] table in the list or form view. |
| Patient access to claim header table | Claim header [sn_hcls_claim_header] | Before query | Runs the Claim headers - authorized to view before query when a patient queries the Claim header [sn_hcls_claim_header] table in the list or form view. |
| Patient access to claim line table | Claim line [sn_hcls_claim_line] | Before query | Runs the Claim lines - authorized to view before query when a patient queries the Claim line [sn_hcls_claim_line] table in the list or form view. |
| Patient access to condition table | Condition [sn_hcls_condition] | Before query | Runs the Conditions - authorized to view before query when a patient queries the Condition [sn_hcls_condition] table in the list or form view. |
| Patient access to encounter table | Encounter [sn_hcls_encounter] | Before query | Runs the Encounters - authorized to view before query when a patient queries the Encounter [sn_hcls_encounter] table in the list or form view. |
| Patient access to Immunization table | Immunization [sn_hcls_immunization] | Before query | Runs the Immunization - authorized to view before query when a patient queries the Immunization [sn_hcls_immunization] table in the list or form view. |
| Patient access to Medication table | Medication [sn_hcls_medication] | Before query | Runs the Medication - authorized to view before query when a patient queries the Medication [sn_hcls_medication] table in the list or form view. |
| Patient access to Member Plan table | Member Plan [sn_hcls_member_plan] | Before query | Runs the Member Plan - authorized to view before query when a patient queries the Member Plan [sn_hcls_member_plan] table in the list or form view. |

**Healthcare and Life Sciences Service Management Core business rules installed
(continued)**

| Business rule | Table | Rule criteria | Description |
|--|--|--------------------------|---|
| Patient access to observation table | Observation [sn_hcls_observation] | Before query | Runs the Observations - authorized to view before query when a patient queries the Observation [sn_hcls_observation] table in the list or form view. |
| Patient access to patient table | Patient [sn_hcls_patient] | Before query | Runs the Patients - represented by me before query when a patient queries the Patient [sn_hcls_patient] table in the list or form view. |
| Patient access to procedure table | Procedure [sn_hcls_procedure] | Before query | Runs the Procedures - authorized to view before query when a patient queries the Procedure [sn_hcls_procedure] table in the list or form view. |
| Populate duration | Encounter [sn_hcls_encounter] | Before insert and update | Calculates and sets the duration of the encounter from the start_time and end_time values of the Encounter [sn_hcls_encounter] table. |
| Populate managing org field | Location [sn_hcls_location] | Before insert and update | Sets the managing organization from the parent location, if it is not already set. |
| Populate Name | Patient [sn_hcls_patient] | Before insert and update | Fills the Name field value from the prefix, given name, family name, or suffix field when the Name field in the Patient [sn_hcls_patient] table is not set. |
| populate primary member plan | Update insurance information [sn_hcls_insurance_info_task] | Before insert | Populates the member plan information from the Primary member plan field of the Update insurance information [sn_hcls_insurance_info_task] table. |
| Populate valid until from validity dur | Policy consent [sn_hcls_policy_consent] | Before insert and update | Sets the valid until value for a policy consent based on the date when the consent was given and the validity duration of the policy. |

**Healthcare and Life Sciences Service Management Core business rules installed
(continued)**

| Business rule | Table | Rule criteria | Description |
|---|---|--------------------------|---|
| Practitioner NPI is unique | Practitioner [sn_hcls_practitioner] | Before insert and update | Aborts the insert or update operation in case of duplicate Practitioner ID or NPI field value. |
| Set consumer in healthcare case | Healthcare case [sn_hcls_case] | Before insert and update | Sets the Consumer field in the Healthcare case [sn_hcls_case] to a patient associated with the case when a healthcare case is created or updated. |
| Set consumer in healthcare sold product | Healthcare sold product [sn_hcls_sold_product] | Before insert and update | Sets the Consumer field in the Healthcare sold product [sn_hcls_sold_product] table to the patient's consumer name. |
| Set Date Enrolled | Enrolled program service [sn_hcls_enrolled_program_service] | Before update | Sets the Date enrolled field value to the current date and time when the enrolled program service state changes to Enrolled . |
| Set Date Enrolled | Enrolled program [sn_hcls_enrolled_program] | Before update | Sets the Date enrolled field value to the current date and time when the enrolled program state changes to Enrolled . |
| Set Date Fulfilled | Enrolled program service [sn_hcls_enrolled_program_service] | Before update | Sets the Date fulfilled field value to the current date and time when the enrolled program service state changes to Fulfilled . |
| Set dosage details from variables | Medication Prescription [sn_hcls_medication_prescription] | Before insert and update | Copies variable values from a dosage characteristic on a medication prescription to the actual field on the dosage details on the medication prescription as mapped by the <i>DosageCharacteristicsMapper</i> script include. |
| Set display name | Medication product model [sn_hcls_medication_product] | Before insert and update | Sets the display name of a medication product to the product model name appended with the Form code. |

**Healthcare and Life Sciences Service Management Core business rules installed
(continued)**

| Business rule | Table | Rule criteria | Description |
|--|--|--------------------------|---|
| Set managing org to location's org | Practitioner location [sn_hcls_practitioner_facility] | Before insert and update | Sets the Organization field in the Service Organization [sn_customer_service_organization] table to the location's managing organization. |
| Set patient self pay | Update insurance information [sn_hcls_insurance_info_task] | After update | Sets the Patient self pay , Insurance verified , and Pre-authorization completed field values to true when the case state changes to Closed complete and the payment type is selected as Self pay . |
| Set policy consents inactive by policy | Patient [sn_hcls_patient] | After update | Sets the policy consent record to inactive when the status of a policy is updated to inactive. |
| Set user from practitioner user | Practitioner location [sn_hcls_practitioner_facility] | Before insert | Sets the User field in the Service Organization Member [sn_csm_service_organization_member] table to the practitioner's User field. |
| Trigger document flow for HC case | Healthcare case [sn_hcls_case] | After insert and update | Evaluates all document decisions that have the case reference configured as input and when the decision conditions are satisfied, initiates the document workflow for the associated document template. |
| Update consumer info from patient | Patient [sn_hcls_patient] | After update | Sets the Phone number and Email fields in the consumer record from the associated patient record. |
| Update docs generated | Attachment [sys_attachment] | After insert | Updates the Documents generated field in the Healthcare case [sn_hcls_case] table with the name of the documents that are generated or attached. |

Healthcare and Life Sciences Service Management Core business rules installed (continued)

| Business rule | Table | Rule criteria | Description |
|---|---|--------------------------|---|
| Update fields with dosage specification | Medication Prescription [sn_hcls_medication_prescription] | Before insert and update | Updates the primary, secondary, and tertiary diagnosis field values from a dosage specification on a medication prescription. |
| Update patient on policy consent | Patient [sn_hcls_patient] | After insert | Updates the patient name in the policy consent record for a newly created patient record. |
| Validate unique doc template for policy | Policy [sn_hcls_policy] | Before insert and update | Validates that only one active policy is associated with a document template. |
| Validate and set patient | Healthcare Task [sn_hcls_task] | Before insert | Sets the patient value on the Healthcare Task [sn_hcls_task] table. |
| Validate and set SSN | Patient [sn_hcls_patient] | Before insert and update | Validates that only the last four digits are set in the Social security number field in the Patient [sn_hcls_patient] table and prepends with *** - ** to set the value in the database. |
| Validate relation and update subscriber | Member Plan [sn_hcls_member_plan] | Before insert and update | Sets subscriber to the patient if the relationship is set to Self. Validates the relationship field value if the subscriber is set. |

Note: To learn about before query business rules, see [Before Query business rules](#).

Healthcare and Life Sciences data model tables

Tables installed with the Healthcare and Life Sciences Service Management Core application enable you to decide the data model, tasks, and product offerings for your Healthcare and Life Sciences workflows.

To learn more about the Healthcare and Life Sciences data model, see [Healthcare and Life Sciences data model](#).

Allergy intolerance table

The Allergy intolerance [sn_hcls_allergy] table stores the information about a clinical assessment of an allergy or intolerance; a propensity, or a potential risk to an individual, to have an adverse reaction on future exposure to the specified substance, or class of substance.

Key features

- Stores any allergy or intolerance associated with a patient.
- Includes the allergy code, type, category, criticality, clinical status, date recorded, and date of onset.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Allergy intolerance form fields

| Field | Data type | Description |
|--------------------------|-------------|---|
| Age of onset | String | Age at which an individual first experience the allergy or intolerance. |
| Allergy intolerance code | Reference | Identifier of the allergy or intolerance. |
| Category | Choice list | <p>Category of an identified substance associated with the allergy or intolerance.</p> <p>The following categories are available by default:</p> <ul style="list-style-type: none"> • Biological • Environment • Food • Medication <p>For more information about the available categories, see allergy intolerance categories defined in the FHIR specifications.</p> |
| Clinical status | Choice list | <p>Status of the allergy or intolerance under clinical trial.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Active • Inactive • Resolved <p>For more information about the available statuses, see allergy intolerance clinical statuses defined in the FHIR specifications.</p> |
| Criticality | Choice list | <p>Estimate of the potential clinical harm or seriousness of a reaction to an identified substance.</p> <p>The following types are available by default:</p> |

Allergy intolerance form fields (continued)

| Field | Data type | Description |
|---------------|-------------|---|
| | | <ul style="list-style-type: none"> • High • Low • Unable to access <p>For more information about the available types, see allergy intolerance criticality types defined in the FHIR specifications.</p> |
| Date of onset | Date/Time | Date and time that the allergy or intolerance began. |
| Date recorded | Date/Time | Date the first version of the allergy or intolerance was recorded into the application. |
| Encounter | Reference | Healthcare event during which this allergy intolerance was asserted. |
| External id | String | Identifier of the record in an electronic medical record (EMR) system. |
| Number | String | <p>Alpha-numeric profile identifier of the allergy intolerance.</p> <p>The value is auto-generated and is incremented every time you add a new allergy or intolerance to your ServiceNow instance. The initial value for the Number field is ALLR00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Allergy intolerance [sn_hcls_allergy] table. For more information, see Add auto-numbering records in a table.</p> |
| Patient | Reference | Patient who has the allergy or intolerance. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Type | Choice list | <p>Underlying physiological mechanism for a reaction risk.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Allergy • Intolerance <p>For more information about the available types, see allergy intolerance types defined in the FHIR specifications.</p> |

Allergy intolerance form fields (continued)

| Field | Data type | Description |
|---------------------|-------------|--|
| Verification status | Choice list | <p>Assertion about certainty associated with a propensity or potential risk of a reaction to the identified substance.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> Confirmed Entered in error Refuted Unconfirmed <p>For more information about the available statuses, see allergy intolerance verification statuses defined in the FHIR specifications.</p> |

Appointment table

The Appointment [sn_hcls_appointment] table stores the appointment booking details for a patient in your healthcare organization.

Key features

- Stores any appointments associated with the patient.
- Includes the appointment type, status, service type, service category, start and end times, priority, location, and practitioner.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Appointment table fields

| Field | Data type | Description |
|---------------------|-----------|---|
| Actual end time | Date/Time | Actual end date and time of the appointment. |
| Actual start time | Date/Time | Actual start date and time of the appointment. |
| Additional comments | String | Detailed or expanded information to support the appointment provided when making the appointment. |
| Appointment Id | String | Identifier of the appointment entered in the electronic medical records (EMR) system. |

Appointment table fields (continued)

| Field | Data type | Description |
|-----------------------------|-------------|---|
| Appointment status | Choice list | <p>Status of an appointment.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Arrived • Booked • Cancelled • Checked in • Entered in error • Fulfilled • No show • Pending • Proposed • Waitlist <p>For more information about the available statuses, see appointment statuses defined in the FHIR specifications.</p> |
| Appointment type | Choice list | <p>Style of appointment or patient that has been booked in the slot.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Checkup • Emergency • Follow up • Routine • Walkin <p>For more information about the appointment types, see appointment types defined in the FHIR specifications.</p> |
| Case | Reference | Case associated with this appointment. |
| Condition | Reference | Condition associated with the appointment. |
| Description | String | Brief description of the appointment as would be shown on a subject line in a meeting request, or appointment list. |
| Duration of the appointment | Duration | Actual duration of the appointment. |

Appointment table fields (continued)

| Field | Data type | Description |
|----------------------|-----------|--|
| Location | Reference | Location of the appointment. |
| Number | String | <p>Alpha-numeric profile identifier of the appointment.</p> <p>The value is auto-generated and is incremented every time you add a new appointment to your ServiceNow instance. The initial value for the Number field is APPT00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Appointment [sn_hcls_appointment] table. For more information, see Add auto-numbering records in a table.</p> |
| Observation | Reference | Observation associated with the appointment. |
| Patient | Reference | Name of the patient. |
| Patient Instructions | String | <p>Patient-facing information about the appointment.</p> <p>For example, request to bring a referral or fast from 8 p.m. the night before.</p> |
| Practitioner | Reference | <p>Person added as the practitioner.</p> <p>Practitioners associated with an appointment are referenced in the Appointment participant [sn_hcls_appointment_participant] table.</p> |
| Priority | Reference | Urgency of the appointment that is used to make informed decisions if needing to reprioritize. |
| Procedure | Reference | Activity that is performed on, with, or for a patient as part of the appointment. |
| Requested end time | Date/Time | Proposed end date and time of the appointment requested by the patient. |
| Requested start time | Date/Time | Proposed start date and time of the appointment requested by the patient. |
| Service category | Reference | Broad category of the service that is to be performed during this appointment. |

Appointment table fields (continued)

| Field | Data type | Description |
|--------------|-----------|---|
| | | For more information about the service categories, see service categories defined in the FHIR specifications. |
| Service type | Reference | <p>Specific service that is to be performed during this appointment.</p> <p>For more information about the service types, see service types defined in the FHIR specifications.</p> |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Specialty | Reference | Specialty of a practitioner that would be required to perform the service requested in this appointment. |

Appointment participant table

The Appointment participant [sn_hcls_appointment_participant] table stores the participant details of an appointment including practitioners.

Key features

- Stores the participant details associated with an appointment.
- Includes the appointment name, practitioner category, participant type, and practitioner ID.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Appointment table fields

| Field | Data type | Description |
|------------------|-------------|--|
| Appointment | Reference | Identifier of the appointment entered in the electronic medical records (EMR) system. |
| Participant type | Choice list | <p>Type of the participant.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> Organization Practitioner Referring patient |
| Practitioner ID | Reference | Identifier of the practitioner entered in the EMR system. |

Appointment table fields (continued)

| Field | Data type | Description |
|-----------------------|-------------|---|
| Practitioner category | Choice list | <p>Category of the practitioner</p> <p>The following categories are available by default:</p> <ul style="list-style-type: none"> • Attending • Consulting • Referring provider • Surgical staff • Visiting |

Attribute table

The Attribute [sn_hcls_characteristic_attribute] table stores the characteristics options associated with a program or program service selected by a patient when submitting a healthcare request.

Key features

- Associates entities with a healthcare case type.
- Stores the association between the Program [sn_hcls_program], Program Service [sn_hcls_program_service], Characteristic [sn_prd_pm_characteristic], Characteristic Option [sn_prd_pm_characteristic_option], and the healthcare case type tables.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Book appointment table

The Book appointment [sn_hcls_book_appt_task] table stores the task details for booking an appointment associated with a healthcare case or its extended case types.

Key features

- Extends the Healthcare task [sn_hcls_task] table to store task details created for appointment bookings associated with a healthcare case or its extended case types.
- Includes the task number, short description, assignment group, patient, procedure, practitioner, parent case, and task status.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Book appointment table fields

| Field | Data type | Description |
|-------------------|-------------|--|
| Assignment group | Reference | Group of members that is assigned the appointment booking task. |
| Number | String | <p>Alpha-numeric profile identifier of the appointment booking task. The value is auto-generated and is incremented every time you add a new appointment booking task to your ServiceNow instance. The initial value for the Number field is APPTS00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Book appointment [sn_hcls_book_appt_task] table. For more information, see Add auto-numbering records in a table.</p> |
| Patient | Reference | Name of the patient. |
| Parent case | Reference | Healthcare case or its extended case types associated with the appointment booking task. |
| Practitioner | Reference | Person added as the practitioner. |
| Procedure | Reference | Activity that is performed on, with, or for a patient as part of the appointment. |
| Short description | String | Brief description of the appointment booking task. |
| State | Choice list | <p>Status of the appointment booking task. The following task statuses for an appointment booking are available by default:</p> <ul style="list-style-type: none"> • Canceled • Completed • Requested |

Claim diagnosis table

The Claim diagnosis table [sn_hcls_claim_diagnosis] stores diagnosis information for claims.

Key features

- Stores the diagnosis code for use with claims.
- Includes both claim and diagnosis information.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Claim diagnosis table fields

| Field | Data type | Description |
|----------------|-----------|---|
| Claim | Reference | Associated claim submitted on behalf of a patient to a payer organization. |
| Claim line | Reference | Associated claim line containing details of the items pertaining to the claim header. |
| Diagnosis code | Reference | Code used to indicate the diagnosis given by a healthcare practitioner. |

Claim header table

The Claim header [sn_hcls_claim_header] table stores the details of the main claim submitted on behalf of a patient to a payer organization.

The table has the following features:

- Stores the main claim submitted on behalf of a patient to a payer organization.
- Enables including multiple claim lines.
- Includes the payer, transaction control number, type, status, patient, member plan, medical record number, account number, and various dates and amounts.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Claim header table fields

| Field | Data type | Description |
|--------------------|-----------|--|
| Adjudicated amount | Currency | Adjusted amount paid for the service by the primary payer. |
| Billed DRG code | String | Diagnosis Related Group (DRG) code for the billed diagnosis-related group. |
| Claim amount | Currency | Original amount submitted with the claim. |
| Date accepted | Date | Date when the claim was accepted by the payer organization. |

Claim header table fields (continued)

| Field | Data type | Description |
|------------------------|-----------|---|
| Date adjudicated | Date | Date when the claim was adjudicated for the payment. |
| Date paid | Date | Date when the claim was paid by the payer organization. |
| Date submitted | Date | Date when the claim was submitted to the payer organization. |
| Fee reduction amount | Currency | Difference between the original claim amount and the adjusted paid amount. |
| Medical record number | String | Medical Record Number (MRN) of the patient as entered in the electronic medical records (EMR) system. |
| Member plan | Reference | Member plan associated with the patient. |
| Name | String | Name to identify the claim header. |
| Number | String | <p>Alpha-numeric profile identifier of the claim header.</p> <p>The value is auto-generated and is incremented every time you add a new claim header to an instance. The initial value for the Number field is CLAIMHDR00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Claim header [sn_hcls_claim_header] table. For more information, see Add auto-numbering records in a table.</p> |
| Paid amount | Currency | Amount to be paid by the patient. |
| Patient | Reference | Patient on whose behalf the claim was submitted. |
| Patient account number | String | Patient account number as entered in the EMR system. |
| Patient payable amount | Currency | Amount for which the patient is responsible. |
| Payer | Reference | Name of the company listed as a payer organization. |

Claim header table fields (continued)

| Field | Data type | Description |
|----------------------------|-------------|---|
| Preauthorization header | Reference | Associated pre-authorization request. |
| Remarks | String | Comments or additional information about the claim. |
| Service provider | Reference | Practitioner who provided the service to the patient. |
| Service provider id | String | Identifier of the practitioner who provided the product or service to the patient. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Status | Choice list | <p>Status of the claim.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Active • Cancelled • Denied • Draft • Entered in error • In hold • Paid • Suspended <p>For more information about the available statuses, see claim statuses defined in the FHIR specifications.</p> |
| Transaction control number | String | Unique identifier of the claim in the payer system. |
| Type | Choice list | <p>Type of the claim.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Institutional • Oral • Pharmacy • Professional • Vision |

Claim header table fields (continued)

| Field | Data type | Description |
|-------|-----------|---|
| | | For more information about the available claim types, see claim types defined in the FHIR specifications. |

Claim line table

The Claim line [sn_hcls_claim_line] table stores the details of the items pertaining to a claim header.

Key features

- Stores the items pertaining to a claim header.
- Includes the payer, provider control number, line title, line number, parent claim, line status, associated procedure, location, practitioner, service start and end dates, various amounts, and codes.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Claim line table fields

| Field | Data type | Description |
|--------------------|-----------|--|
| Adjudicated amount | Currency | Adjusted amount paid for the service associated with the claim line. |
| Claim | Reference | Original claim associated with the claim line. |
| Code modifier | String | Modifier that helps further describe a procedure code without changing its definition. |
| Comments | String | Additional information about the claim line. |
| Days/Units | String | Number of days or units of the service provided. |
| Exception codes | String | Exception codes associated with the claim line. |
| Fee reduction | Currency | Difference between the original claim amount and the adjusted paid amount. |
| Line number | String | Sequential number to distinguish the service submitted in a claim. |

Claim line table fields (continued)

| Field | Data type | Description |
|-------------------------------------|-------------|---|
| Line status | Choice list | <p>Status of the claim line rather than the entire claim.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Active • Cancelled • Denied • Draft • Entered in error • In hold • Paid • Suspended <p>For more information about the available statuses, see claim statuses defined in the FHIR specifications.</p> |
| Line title | String | Name to identify the claim line. |
| Location | Reference | Location where the service was performed. |
| National drug code | String | Code of the drug included in the service as identified in the National Drug Code (NDC) billing guidelines. |
| Number | String | <p>Alpha-numeric profile identifier of the claim line.</p> <p>The value is auto-generated and is incremented every time you add a new claim line to an instance. The initial value for the Number field is CLAIMLN00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Claim line [sn_hcls_claim_line] table. For more information, see Add auto-numbering records in a table.</p> |
| Original transaction control number | String | Unique identifier of the original claim in the payer system. |
| Paid amount | Currency | Total amount paid or the service associated with the claim line. |

Claim line table fields (continued)

| Field | Data type | Description |
|-------------------------|-----------|--|
| Procedure code | Reference | <p>Code to identify the specific procedure associated with the claim. Code is based on the Current Procedural Terminology (CPT) or Healthcare Common Procedure Coding System (HCPCS) coding system.</p> <p>For more information about the available codes, see procedure codes defined in the FHIR specifications.</p> |
| Provider control number | String | Number assigned to the service by the service provider for tracking and billing purposes. |
| Revenue code | String | Revenue grouping code associated with the claim line. |
| Service end date | Date | Service end date for the claim line. |
| Service price | Currency | Price of the service associated with the claim line. |
| Service provider | Reference | Practitioner who provided the service to the patient. |
| Service start date | Date | Service start date for the claim line. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Tooth code | String | <p>Code of the tooth on which service was performed.</p> <p>Applies to dental providers only.</p> |

Condition table

The Condition [sn_hcls_condition] table stores the information about a condition, problem, diagnosis, or other event, situation, issue, or clinical concept that has risen to a level of concern.

Key features

- Stores any medical conditions or diseases that a patient may have reported or diagnosed with.
- Includes the condition code, anatomical location, category, clinical status, date recorded, and date of onset.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Condition table fields

| Field | Data type | Description |
|---------------------|-------------|---|
| Anatomical location | Reference | Body sites where the condition manifested. |
| Category | Choice list | <p>Category of the condition.</p> <p>The following categories are available by default:</p> <ul style="list-style-type: none"> • Diagnosis • Problem <p>For more information about the available categories, see condition categories defined in the FHIR specifications.</p> |
| Clinical status | Choice list | <p>Status of the subject under clinical trial.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Active • Inactive • Recurrence • Relapse • Remission • Resolved <p>For more information about the available statuses, see condition clinical statuses defined in the FHIR specifications.</p> |
| Condition code | Reference | Identifier of the condition, problem, or diagnosis. |
| Date recorded | Date/Time | <p>Date and time when the condition was first recorded into the application.</p> <p>This field is automatically set to the current date and time.</p> |

Condition table fields (continued)

| Field | Data type | Description |
|---------------------|-------------|---|
| Encounter | Reference | Healthcare event during which this condition was created or to which the creation of this record is tightly associated. |
| External identifier | String | Identifier of the record in an electronic medical record (EMR) system. |
| Number | String | <p>Alpha-numeric profile identifier of the condition.</p> <p>The value is auto-generated and is incremented every time you add a new condition to your ServiceNow instance. The initial value for the Number field is COND00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Condition [sn_hcls_condition] table. For more information, see Add auto-numbering records in a table.</p> |
| Onset age | String | Age at which an individual acquires, develops, or first experiences a condition or symptoms of a disease or disorder. |
| Onset date | Date/Time | Date and time when the condition began, in the opinion of the clinician. |
| Patient | Reference | Patient associated with the condition record. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Verification status | Choice list | <p>Verification status to support or decline the clinical status of the condition.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Confirmed • Differential • Entered in error • Provisional • Refuted • Unconfirmed <p>For more information about the available statuses, see condition verification statuses defined in the FHIR specifications.</p> |

Dosage definition table

The Dosage definition [sn_hcls dosage definition] table models the Dosage specification [sn_hcls dosage specification] table for use as a request definition parameter.

Key features

- Extends the Request Definition [sn_ind_request_definition] table.
- References the Dosage specification [sn_hcls dosage specification] table.
- Includes the medication prescription details, dosage specification publishing status, program associated with the dosage specification, and diagnosis details as stored in the Dosage specification [sn_hcls dosage specification] table.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Dosage definition table fields

| Field | Data type | Description |
|---------------------|------------|--|
| Active | True/False | Option for enabling the dosage specification. |
| Description | String | Additional information about the dosage specification. |
| Dosage definition | Reference | Models the Dosage specification [sn_hcls dosage specification] table. |
| Medication product | Reference | Medication product being prescribed for the patient. |
| Name | String | Name to identify the dosage specification. |
| Primary diagnosis | Reference | Main condition in a patient submitted by the practitioner as the reason for the healthcare service requested. |
| Program | Reference | Program associated with the medication product, |
| Secondary diagnosis | Reference | Coexisting condition that might exist in a patient submitted by the practitioner. |
| State | String | Status of the dosage specification. If you have not published the dosage specification, this field is automatically set to Draft . If you have already published the dosage specification, this field is automatically set to Published . |

Dosage definition table fields (continued)

| Field | Data type | Description |
|--------------------|-----------|--|
| Tertiary diagnosis | Reference | Highly specialized medical care recommended for the patient by the practitioner. |

Dosage specification table

The Dosage specification [sn_hcls dosage specification] table stores the information about medication product dosage associated with a program.

Key features

- Extends the Specification [sn_prd_pm_specification] table.
- Has one to many relationship with the Specification Characteristic [sn_prd_pm_specification_characteristic] table.
- Includes the medication prescription details, dosage specification publishing status, program associated with the dosage specification, and diagnosis details.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Dosage specification table fields

| Field | Data type | Description |
|--------------------|------------|---|
| Active | True/False | Option for enabling the dosage specification. |
| Description | String | Additional information about the dosage specification. |
| Dosage definition | Reference | Models the Dosage specification [sn_hcls dosage specification] table. |
| Medication product | Reference | Medication product being prescribed for the patient. |
| Name | String | Name to identify the dosage specification. |
| Primary diagnosis | Reference | Main condition in a patient submitted by the practitioner as the reason for the healthcare service requested. |
| Program | Reference | Program associated with the medication product, |

Dosage specification table fields (continued)

| Field | Data type | Description |
|---------------------|-----------|--|
| Secondary diagnosis | Reference | Coexisting condition that might exist in a patient submitted by the practitioner. |
| State | String | Status of the dosage specification. If you have not published the dosage specification, this field is automatically set to Draft . If you have already published the dosage specification, this field is automatically set to Published . |
| Tertiary diagnosis | Reference | Highly specialized medical care recommended for the patient by the practitioner. |

Dosage variable table

The Dosage variable [sn_hcls dosage_variable] table stores the variables configured for a dosage specification displayed on the Medication Prescription form of a Healthcare and Life Sciences Service Management application.

Key features

- Extends the Variables [var_dictionary] table.
- References the Dosage definition [sn_hcls dosage_definition] table.
- Includes the variables when added for a dosage specification. For example, quantity, number of authorized refills, instructions for patient, dosage, and maximum dose per day.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Encounter table

The Encounter [sn_hcls_encounter] table stores the information about an interaction between a patient and healthcare providers for providing healthcare services or assessing the health status of a patient.

Key features

- Stores any encounters that a patient has undergone with any practitioner.
- Includes the encounter type, service type, practitioner, location of the encounter, and start and end times of the encounter.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Encounter table fields

| Field | Data type | Description |
|------------------|-----------|---|
| Appointment | Reference | Appointment marked as fulfilled and linked to the encounter. |
| Duration | Duration | <p>Time during the encounter that the participant participated.</p> <p>This field is automatically set to the duration between Start time and End time of an encounter.</p> |
| Encounter type | Reference | Type of encounter. |
| End time | Date/Time | Date and time when the participation of a patient in the encounter ended. |
| External id | String | Identifier of the record in an electronic medical record (EMR) system. |
| Location | Reference | Healthcare location where the encounter takes place. |
| Number | String | <p>Alpha-numeric profile identifier of the encounter.</p> <p>The value is auto-generated and is incremented every time you add a new encounter to your ServiceNow instance. The initial value for the Number field is ENC00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Encounter [sn_hcls_encounter] table. For more information, see Add auto-numbering records in a table.</p> |
| Parent encounter | Reference | Parent healthcare event associated with the encounter. |
| Patient | Reference | Patient involved in the encounter. |
| Practitioner | Reference | Practitioner involved in the encounter. |
| Priority type | Reference | Urgency of the encounter that is used to make informed decisions if needing to reprioritize. |
| Service provider | Reference | Healthcare organization responsible for the services included in the encounter. |

Encounter table fields (continued)

| Field | Data type | Description |
|--------------|-------------|---|
| Service type | Reference | <p>Broad category of the service that is to be provided.</p> <p>For more information about the available types, see service types defined in the FHIR specifications.</p> |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Start time | Date/Time | Date and time when the participation of a patient in the encounter began. |
| Status | Choice list | <p>Status of the encounter.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Arrived • Cancelled • Entered in error • Finished • In progress • On leave • Planned • Triaged • Unknown <p>For more information about the available statuses, see encounter statuses defined in the FHIR specifications.</p> |

Enrolled Program table

The Enrolled Program [sn_hcls_enrolled_program] table stores the programs that a patient has been enrolled into.

Key features

- Extends the Install base item [sn_install_base_item] table to all supported enrolled programs.
- Stores the enrolled programs sold to a patient.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Enrolled Program table fields

| Field | Data type | Description |
|----------------|-----------|---|
| Date Enrolled | Date | Date when the patient was enrolled into the program. |
| Date Requested | Date | Date when the patient requested to be enrolled into the program. |
| State | Integer | <p>State of the enrollment program.</p> <p>State is one of the following types:</p> <ul style="list-style-type: none"> • Canceled • Enrolled • Fulfilled • Pending fulfillment • Rejected • Requested |
| Number | String | <p>Alpha-numeric profile identifier of the enrolled program.</p> <p>The value is auto-generated and is incremented every time you add a new observation to your ServiceNow instance. The initial value for the Number field is ENPG00001001.</p> <p>i Note: To customize the number, define the auto-numbering format for the Enrolled Program [sn_hcls_enrolled_program] table. For more information, see Add auto-numbering records in a table.</p> |
| Patient | Reference | Consumer that is enrolled into the program as a patient. |
| Program Name | Reference | Name to identify the enrolled program. |

Enrolled Program Service table

The Enrolled Program Service [sn_hcls_enrolled_program_service] table stores the program services provided to a patient as part of a program enrollment process.

Key features

- Extends the Install base item [sn_install_base_item] table to all supported enrolled program services.
- Stores the enrolled program services sold to a patient.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Enrolled Program Service table fields

| Field | Data type | Description |
|-----------------|-----------|--|
| Date Enrolled | Date | Date when the patient was enrolled into the program service. |
| Date fulfilled | Date | Date when the service was fulfilled for the patient. |
| Date requested | Date | Date when the service was requested by the patient. |
| State | Integer | <p>State of the enrollment program service.</p> <p>State is one of the following types:</p> <ul style="list-style-type: none"> • Canceled • Enrolled • Fulfilled • Pending fulfillment • Rejected • Requested |
| Number | String | <p>Alpha-numeric profile identifier of the enrolled program service.</p> <p>The value is auto-generated and is incremented every time you add a new observation to your ServiceNow instance. The initial value for the Number field is ENSRV00001001.</p> <p>i Note: To customize the number, define the auto-numbering format for the Enrolled Program Service [sn_hcls_enrolled_program_service] table. For more information, see Add auto-numbering records in a table.</p> |
| Patient | Reference | Consumer or account that is enrolled into the program as a patient. |
| Program service | Reference | Name to identify the enrolled program service. |

Healthcare case table

The Healthcare case [sn_hcls_case] table is an abstract table and is extendable that stores healthcare-related cases.

Key features

- Extends the Case [sn_customerservice_case] table to store all healthcare cases associated with a patient. For more information, see, [Tables installed with Customer Service Management](#).
- Includes the **Patient** field as an optional field and a reference to the Patient [sn_hcls_patient] table. For more information, see [Patient table](#).
- Enables healthcare case types including drug program enrollment, clinical trial enrollment, billing inquiry, and patient appointment request.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Healthcare code set table

The Healthcare code set [sn_hcls_code_set] table stores the details of code sets available in your ServiceNow instance.

Key features

- Enables HL7-based data tables including healthcare specialties, services, procedures, encounters.
- Enables grouping of all HL7 data into code sets with attributes type, code, and name.
- By default, supports the following HL7-based data tables:
 - Care specialty
 - Condition
 - Observation
 - Procedure
 - Allergy intolerance
 - Encounter
 - Body site
 - Service type
 - Service category
 - Priority
 - Medication code
 - Medication form code
 - Practitioner type

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Healthcare code set table fields

| Field | Data type | Description |
|---------------------|-------------|--|
| Code | String | Code value including symbols, expressions, or both. |
| Code system ID | String | Identifier of the system that holds the code set. |
| Code system name | String | Name of the system that holds the code set. |
| External identifier | String | Identifier of the record in an electronic medical record (EMR) system. |
| Name | String | Name to identify the code. |
| Type | Choice list | <p>Common language including set of identifiers, names, and codes for identifying health measurements, observations, and documents.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Allergy Intolerance • Body site • Care specialty • Condition • Encounter • Language code • Medication code • Medication form code • Observation • Practitioner type • Procedure • Priority • Service category • Service type <p>For more information about the available code sets, see value sets all types defined in the FHIR specifications.</p> |

Healthcare location table

The Healthcare Location [sn_hcls_location] table stores details of the location associated with your healthcare organization.

Key features

- Models locations of different physical types including a site, a hospital building, a research lab, a parking lot, or a patient's home.
- Enables a location to include multiple locations.
- Related lists for procedures, care specialities, and conditions are shown for records created via the Codeset location [sn_hcls_codeset_location] table.
- Maps with devices via the Medical device install base item [sn_hcls_medical_device_install_base_item] table.
- Maps with practitioners via the Practitioner location [sn_hcls_practitioner_facility] table.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Healthcare location table fields

| Field | Data type | Description |
|-------------|-----------------------|--|
| Altitude | Floating Point Number | Altitude of the absolute geographic location. |
| City | String | City in which the physical location is located. |
| Country | String | Country in which the physical location is located. |
| Description | String | More details about the location that could be displayed as further information to identify the location beyond its name. |
| Fax phone | Phone number | Fax number of the physical location. |
| Internal | True/False | Option to indicate that the location is for internal use. |
| Latitude | Floating Point Number | Latitude of the absolute geographic location. |
| Location | Reference | Physical location of this healthcare location. Entry selected here populates address fields. |
| Location id | String | Unique identifier of the physical location. |

Healthcare location table fields (continued)

| Field | Data type | Description |
|-----------------------|-----------------------|--|
| Longitude | Floating Point Number | Longitude of the absolute geographic location. |
| Name | String | Name to identify the healthcare location. |
| Managing organization | Reference | Organization which manages this location. |
| Parent location | Reference | Sys_id of the parent location associated with this location. |
| Phone | Phone Number | Phone number of the physical location. |
| Physical type | Choice list | <p>Physical form of the location.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Area • Bed • Building • Cabinet • Corridor • Jurisdiction • Level • Room • Road • Site • Vehicle • Wing • Ward <p>For more information about the available physical types, see location types defined in the FHIR specifications.</p> |
| State / Province | String | State or province in which the physical location is located. |
| Status | Choice list | Option to indicate whether the healthcare location is in use. |

Healthcare location table fields (continued)

| Field | Data type | Description |
|-------------------|--------------------|---|
| | | <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Active • Inactive • Suspended <p>For more information about the available statuses, see location statuses defined in the FHIR specifications.</p> |
| Street | Two Line Text Area | Mailing street address of the physical location. |
| Website | URL | URL of the website for the associated organization. |
| Zip / Postal code | String | ZIP or postal code for the physical location. |

Healthcare organization table

The Healthcare organization [sn_hcls_organization] table stores the details of a healthcare organization in your ServiceNow instance.

Key features

- Models healthcare organizations of different types including providers and payers.
- Enables a healthcare organization to include other healthcare organizations and also include multiple locations.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Healthcare organization table fields

| Field | Data type | Description |
|-------------------|--------------|--|
| Business location | Reference | The associated business location. |
| City | String | City in which the organization is located. |
| Fax phone | Phone Number | Fax number of the organization. |

Healthcare organization table fields (continued)

| Field | Data type | Description |
|-------------------|--------------|--|
| Internal | True/False | Option to indicate that the organization is internal. |
| Name | String | Name to identify the healthcare organization. |
| Notes | String | Any information about the organization that would be useful for others to know. |
| Organization id | String | Unique identifier for the organization. |
| Organization type | Choice list | <p>Type of healthcare organization you represent.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Clinical research sponsor • Community group • Educational institute • Government • Healthcare provider • Hospital department • Non-healthcare business • Organizational team • Other • Payer • Pharmaceutical company • Religious institution <p>For more information about the available organization types, see organization types defined in the FHIR specifications.</p> |
| Parent | Reference | Parent organization associated with the organization. |
| Phone | Phone Number | Phone number of the organization. |
| State / Province | String | State or province in which the organization is located. |

Healthcare organization table fields (continued)

| Field | Data type | Description |
|-------------------|--------------------|---|
| Street | Two Line Text Area | Mailing street address of the organization. |
| Zip / Postal code | String | ZIP or postal code for the organization. |

Healthcare sold product table

The Healthcare sold product [sn_hcls_sold_product] stores the healthcare products sold to an account or consumer.

Key features

- Extends the Sold Product [sn_install_base_sold_product] table to all supported healthcare sold products.
- Stores the healthcare products sold to an account or consumer.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Healthcare sold product table fields

| Field | Data type | Description |
|---------------------|-----------|---|
| Account | Reference | Account associated with the sold product. Note: If you enter an account, the Consumer field is hidden. |
| Consumer | Reference | Consumer associated with the sold product. Note: If you enter a consumer, the Account field is hidden. |
| Name | String | Name to identify the healthcare sold product. |
| Parent Sold Product | Reference | Parent sold product, if applicable. |
| Product | Reference | Product model the sold product belongs to. |
| Source task | Reference | Source task associated with a program or program service. |

Healthcare Task table

The Healthcare Task [sn_hcls_task] table is an abstract table and is extendable that stores the details of the task associated with a healthcare case or a patient in your healthcare organization.

Key features

- Extends the Task [task] table to store all healthcare tasks associated with a patient or a healthcare case. For more information, see [Task table](#).
- Includes the **Patient** field as a reference to the Patient [sn_hcls_patient] table. For more information, see [Patient table](#).
- Enables healthcare task types including appointment booking and updating insurance information.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Immunization table

The Immunization [sn_hcls_immunization] table stores the information about an event of a patient being administered a vaccine or a record of an immunization as reported by a patient, a clinician, or another party.

Key features

- Extends the Install base item [sn_install_base_item] table to store immunization details.
- Stores all immunization data associated with a patient, including the vaccine received, administered date, recommended doses, dose number, location where it was administered, practitioner who administered it, and the condition for which the vaccine was given.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Immunization table fields

| Field | Data type | Description |
|----------------------|-------------|--|
| Administered by | Reference | Practitioner who administered the patient. |
| Administration route | Choice list | <p>Route by which the vaccine was administered.</p> <p>The following routes are available by default:</p> <ul style="list-style-type: none"> Intradermal Intramuscular Intravenous Nasal Oral |

Immunization table fields (continued)

| Field | Data type | Description |
|-------------------|-------------|---|
| | | <ul style="list-style-type: none"> • Percutaneous • Subcutaneous • Transdermal <p>For more information about the available routes, see immunization routes defined in the FHIR specifications.</p> |
| Body site | Choice list | <p>Body site at which the vaccine was administered.</p> <p>The following body sites are available by default:</p> <ul style="list-style-type: none"> • Left arm • Left deltoid • Left gluteus medius • Left lower forearm • Left thigh • Left vastus lateralis • Right arm • Right deltoid • Right thigh • Right gluteus medius • Right lower forearm • Right vastus lateralis <p>For more information about the body sites, see immunization sites defined in the FHIR specifications.</p> |
| Date administered | Date/Time | Date and time when the vaccine was administered. |
| Dose number | Integer | Dose sequence number within the vaccine series. |
| Dose quantity | String | Quantity of dose given to the patient. |
| Encounter | Reference | Encounter the immunization was part of. |
| External id | String | Identifier of the record in an electronic medical record (EMR) system. |

Immunization table fields (continued)

| Field | Data type | Description |
|---------------------|-------------|---|
| Healthcare location | Reference | Service delivery location in which the vaccine was or was to be administered. |
| Number | String | <p>Alpha-numeric profile identifier of the immunization.</p> <p>The value is auto-generated and is incremented every time you add a new immunization to your ServiceNow instance. The initial value for the Number field is IMM00001001.</p> <p>i Note: To customize the number, define the auto-numbering format for the Immunization [sn_hcls_immunization] table. For more information, see Add auto-numbering records in a table.</p> |
| Observation | Reference | Observation associated with the immunization. |
| Patient | Reference | Patient who received the vaccine and is being administered. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Vaccine product | Reference | Vaccine product sold to the patient who is being administered. |
| Recommended doses | Integer | Recommended number of doses to achieve immunity. |
| Status | Choice list | <p>Status of the immunization.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> Completed Incorrect entry Not done <p>For more information about the available statuses, see immunization statuses defined in the FHIR specifications.</p> |
| Status reason | String | Explanation why a vaccine was not administered. |
| Target disease | Reference | Vaccine preventable disease the dose is being administered for. |

Immunization table fields (continued)

| Field | Data type | Description |
|----------------------|-----------|--|
| Vaccine expiry date | Date | Date when the vaccine product expires. |
| Vaccine lot number | String | Lot number of the vaccine product. |
| Vaccine manufacturer | String | Manufacturer of the vaccine product. |

Medication table

The Medication [sn_hcls_medication] table stores the information about a medication for the purposes of prescribing, dispensing, and administering a medication as well as for making statements about medication use.

Key features

- Extends the Install base item [sn_install_base_item] table to store medication details associated with a patient.
- Stores all medications received by a patient, including the medication name, start and end dates, status, the condition for which it was given, and the procedure it may be associated with.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Medication table fields

| Field | Data type | Description |
|-------------------|-----------|--|
| Condition | Reference | Condition for which the medication is being administered. |
| Date administered | Date/Time | Date and time when the medication was administered. |
| Encounter | Reference | Associated encounter as part of which medication was administered. |
| End date | Date | Date when the patient completed taking the medication. |
| External id | String | Identifier of the record in an electronic medical record (EMR) system. |

Medication table fields (continued)

| Field | Data type | Description |
|--------------------|-------------|---|
| Number | String | <p>Alpha-numeric profile identifier of the medication.</p> <p>The value is auto-generated and is incremented every time you add a new medication to your ServiceNow instance. The initial value for the Number field is MED00001001.</p> <p>i Note: To customize the number, define the auto-numbering format for the Medication [sn_hcls_medication] table. For more information, see Add auto-numbering records in a table.</p> |
| Observation | Reference | Observation associated with the medication. |
| Patient | Reference | Patient who received the medication and is being administered. |
| Procedure | Reference | Procedure during which the medication is being administered. |
| Medication product | Reference | Medication sold to the patient. |
| Parent medication | Reference | Parent medication product associated with the medication product. |
| Reason code | String | System-defined code that represents the reason why a medication was administered. |
| Reason description | String | Reason why a medication was administered. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Start date | Date | Date when the patient started taking the medication. |
| Status | Choice list | <p>Status of the medication.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Completed • Entered in error • In progress • Not done |

Medication table fields (continued)

| Field | Data type | Description |
|---------------|-----------|---|
| | | <ul style="list-style-type: none"> • On hold • Stopped • Unknown <p>For more information about the available statuses, see medication statuses defined in the FHIR specifications.</p> |
| Status reason | String | Explanation of the selected status. |

Medication Prescription table

The Medication Prescription [sn_hcls_medication_prescription] table stores the information about prescriptions ordered for a patient.

Key features

Includes the medication prescription details, prescription status, dosage, and diagnosis details.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Medication Prescription table fields

| Field | Data type | Description |
|---------------------|-----------|--|
| Case | Reference | Parent case associated with the medication prescription. |
| Days supply | Integer | Number of days for which the medication is prescribed. |
| Date authored | Date/Time | Date and time when the prescription was written. |
| Dosage instructions | String | Instructions for the dosage of the medication product. |
| External identifier | String | Identifier of the record in an electronic medical record (EMR) system. |
| Medication product | Reference | Medication product being prescribed for the patient. |

Medication Prescription table fields (continued)

| Field | Data type | Description |
|----------------------------|-------------|--|
| Number | String | <p>Alpha-numeric profile identifier of the enrolled program.</p> <p>The value is auto-generated and is incremented every time you add a new observation to your ServiceNow instance. The initial value for the Number field is MEDPR00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Medication Prescription [sn_hcls_medication_prescription] table. For more information, see Add auto-numbering records in a table.</p> |
| Organization | Reference | Healthcare provider that is responsible for the prescription. |
| Patient | Reference | Name of the patient to whom the medication will be given. |
| Practitioner | Reference | Name of the practitioner who ordered the prescription for the patient. |
| Primary diagnosis | Reference | Main condition in a patient submitted by the practitioner as the reason for the healthcare service requested. |
| Prior prescription | Reference | Prescription ordered earlier for the patient. |
| Priority | Choice list | Urgency of the prescription that is used to make informed decision if needing to be prioritized. |
| Quantity | Decimal | Quantity of the specified medication in one fill. |
| Reference Medication event | Reference | Encounter that identifies the occurrence of contact between patient and healthcare provider. |
| Refills | Integer | Number of authorized refills for the medication. |
| Secondary diagnosis | Reference | Coexisting condition that might exist in a patient submitted by the practitioner. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Status | Choice list | Status of the ordered prescription. |

Medication Prescription table fields (continued)

| Field | Data type | Description |
|---------------------|-----------|--|
| | | <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Active • Draft • Cancelled • Completed • Entered in error • Expired • On-Hold • Stopped • Unknown <p>For more information about the available statuses, see medication prescription statuses  defined in the FHIR specifications.</p> |
| Status reason | String | Explanation of the selected status. |
| Tertiary diagnosis | Reference | Highly specialized medical care recommended for the patient by the practitioner. |
| Validity start date | Date | Earliest time of the validity period of the prescription. |
| Validity end date | Date | Latest time of the validity period of the prescription. |

Medication product model table

The Medication product model [sn_hcls_medication_product] table stores the information about substances that are used to treat diseases, to relieve complaints, or to prevent such diseases or complaints in the first place.

Key features

- Extends the Consumable Model [cmdb_consumable_product_model] table to model all the supported medication products.
- Includes the medication code, form code, and name for the medication product.
- Maps the manufacturer field from the Consumable Model [cmdb_consumable_product_model] table to the healthcare organization manufacturing the medication product.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Medication product model table fields

| Field | Data type | Description |
|----------------------|-------------|--|
| External identifier | String | Identifier of the record in an electronic medical record (EMR) system. |
| Manufacturer | Reference | Company that built the medication. |
| Manufacturer | Reference | Company that built the medication. |
| Medication code | Reference | Business identifier for the product. |
| Medication form code | Reference | Form of the medication product. |
| Name | String | Medication product name. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Status | Choice list | Status of the medication product as active, retired, or entered in error. |

Medical device install base item table

The Medical device install base item [sn_hcls_medical_device_install_base_item] table stores the medical device details associated with a healthcare case or its extended case types.

Key features

- Extends the Install Base Item [sn_install_base_item] table to medical device details associated with a healthcare case or its extended case types.
- Includes the name, configuration item, service organization, risk score, and protected health information (PHI) indication details.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Install Base Item table fields

| Field | Data type | Description |
|------------------------------------|-------------|--|
| Configuration Item | Reference | Medical device stored as an install base item. |
| Name | String | Name to identify the medical device. |
| Number | String | <p>Alpha-numeric profile identifier of the medical device.</p> <p>The value is auto-generated and is incremented every time you add a new medical device to your ServiceNow instance. The initial value for the Number field is IBITM0001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Medical device install base item [sn_hcls_medical_device_install_base_item] table. For more information, see Add auto-numbering records in a table.</p> |
| Protected health information (PHI) | True/False | Option to indicate whether the medical device is a protected health information (PHI) item. |
| Risk score | String | Rating calculated for the medical device. |
| Serial number | String | Serial number of the medical device. |
| Service Organization | Reference | Location of the medical device. |
| State | Choice list | <p>Installation status of the medical device.</p> <p>The following install statuses for a medical device are available by default:</p> <ul style="list-style-type: none"> • Absent • Canceled • In Maintenance • Installed • Pending install • Retired • Stolen |

Member plan table

The Member Plan [sn_hcls_member_plan] table stores the details of a health insurance plan associated with a patient.

Key features

- Extends the Install base item [sn_install_base_item] table to store member plan details.
- Models the health insurance data associated with a patient, including the member number, group number, the payer plan that is purchased and start and end dates of the plan.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Member plan table fields

| Field | Data type | Description |
|---------------------|-----------|--|
| Effective from | Date | Start date from when the member plan is effective. |
| Effective to | Date | End date until when the member plan is effective. |
| External identifier | String | Identifier of the record in an electronic medical record (EMR) system. |
| Group number | String | Group number or policy number of the member. |
| Member | Reference | The associated member's first and last name. |
| Member number | String | Unique ID number of the patient that enables healthcare providers to verify insurance coverage and arrange payment for services. |
| Number | String | Alpha-numeric profile identifier of the member plan. |
| Patient | Reference | Name of the patient in whose name is the plan. |
| Plan priority | String | Priority of the plan. The priority of the plan is: |

Member plan table fields (continued)

| Field | Data type | Description |
|------------------------|-----------|--|
| | | <ul style="list-style-type: none"> Primary: The first member plan to which the patient is the subscriber and that is used as if there's no other plans for the patient. Secondary: The second member plan to which the patient is listed as a dependent. Tertiary: The third member plan to be billed for the patient. The tertiary plan is used after the primary and secondary plans have been successfully processed. |
| Payer plan | Reference | Member plan taken by the patient. |
| Relation to subscriber | Reference | Relationship of the dependent member with the subscriber. |
| Rx Bin | String | Number to identify how a prescription drug will be reimbursed and where a pharmacy can send a reimbursement claim to. |
| Rx Group | String | Alphanumeric or numeric value of the member plan that is used to process prescription benefits. |
| Rx PCN | String | Processor control number (PCN) used in routing of pharmacy reimbursements. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Subscriber | Reference | Subscriber's patient record. |

Observation table

The Observation [sn_hcls_observation] table stores the information about measurements and simple assertions made about a patient.

Key features

- Stores any observations about a patient.
- Includes the status, category, observed date, anatomical location, and practitioner who recorded the observation.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Observation table fields

| Field | Data type | Description |
|---------------------|-------------|---|
| Anatomical location | Reference | Body sites of the observation. |
| Category | Choice list | <p>High-level observation category.</p> <p>The following categories are available by default:</p> <ul style="list-style-type: none"> • Activity • Exam • Imaging • Laboratory • Procedure • Social history • Survey • Therapy • Vital signs <p>For more information about the available categories, see observation categories defined in the FHIR specifications.</p> |
| Date observed | Date/Time | Date and time when the observation was first recorded into the application. |
| Encounter | Reference | Healthcare event related to the observation. |
| External id | String | Identifier of the record in an electronic medical record (EMR) system. |
| Number | String | <p>Alpha-numeric profile identifier of the observation.</p> <p>The value is auto-generated and is incremented every time you add a new observation to your ServiceNow instance. The initial value for the Number field is OBSV00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Observation [sn_hcls_observation] table. For more information, see Add auto-numbering records in a table.</p> |
| Observation | Reference | <p>Code for an observation type.</p> <p>For more information about the available codes, see observation codes defined in the FHIR specifications.</p> |

Observation table fields (continued)

| Field | Data type | Description |
|---------------------|-------------|--|
| Organization | Reference | Organization that is responsible for the observation. |
| Patient | Reference | Patient who is being observed. |
| Practitioner | Reference | Practitioner who is responsible for the observation. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Status | Choice list | <p>Status of an observation.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Amended • Final • Preliminary • Registered <p>For more information about the available statuses, see observation statuses defined in the FHIR specifications.</p> |
| Verification status | Choice list | <p>Verification status to support or decline the clinical status of the condition or diagnosis.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Confirmed • Differential • Entered in error • Provisional • Refuted • Unconfirmed <p>For more information about the available statuses, see condition verification statuses defined in the FHIR specifications.</p> |

Patient table

The Patient [sn_hcls_patient] table stores the details of a patient in your healthcare organization.

Key features

- Extends the Consumer profile [sn_csm_consumer_profile] table.
- Stores details of a patient, the central object in the Healthcare and Life Sciences data model.
- Stores basic patient information including first name, last name, date of birth, gender, primary and secondary emails, home, work and mobile phones, social security number.
- Includes the consumer attribute associated with the patient that is a reference to the Consumer [csm_consumer] table. A Consumer record is automatically created when a patient is created in the Patient [sn_hcls_patient] table.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Patient table fields

| Field | Data type | Description |
|--------------------|-------------|---|
| Birth place | Reference | Birth place of the patient. |
| Date of birth | String | Birth date of the patient. |
| Deceased | True/False | Option to indicate the patient is deceased. |
| Deceased date/time | Date/Time | Date and time of patient's death. |
| Ethnicity | Choice list | <p>Ethnic group the patient identifies with.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Hispanic or Latino • Not Hispanic or Latino • Unable to report due to do policy/law |
| First name | String | First name of the patient. |
| Gender | Choice list | <p>Gender of the patient.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Female • Male • Non binary • Not disclosed • Other |

Patient table fields (continued)

| Field | Data type | Description |
|----------------------|-------------|--|
| Guarantor id | String | Identifier that applies to a person who is responsible for paying all charges for services ordered on behalf of the patient |
| Home phone | String | Home phone number of the patient. |
| Interpreter required | True/False | Option to indicate that an interpreter is needed during patient interactions. |
| Is DOB estimated | True/False | Option to indicate the date of birth (DOB) of the patient is an estimated value. |
| Language code | Reference | Represents the preferred language of interaction for the patient. |
| Last name | String | Last name of the patient. |
| Marital status | Choice list | Marital status of the patient. |
| Middle name | String | Middle name of the patient. |
| Mobile phone | String | Mobile phone number of the patient. |
| Occupation | String | Occupation of the patient. |
| Name | String | Name to identify the patient. |
| Number | String | <p>Alpha-numeric profile identifier of the patient.</p> <p>The value is auto-generated and is incremented every time you add a new patient to an instance. The initial value for the Number field is PAT00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Patient [sn_hcls_patient] table. For more information, see Add auto-numbering records in a table.</p> |
| Patient ID or MRN | String | Identifier that applies to a patient such as Medical Record Number (MRN) as entered in the electronic medical records (EMR) system. |

Patient table fields (continued)

| Field | Data type | Description |
|---------------------------------|-------------|--|
| Preferred communication channel | Choice list | <p>Patient's preferred communication channel, including email, phone, or chat.</p> <p>The value is dependent on the value entered in the Preferred communication method field.</p> |
| Preferred communication method | Choice list | Patient's preferred communication method, including email, text, or phone. |
| Prefix | String | <p>Part of the patient name that is acquired as a title due to academic, legal, employment or nobility status, and that appears at the start of the name.</p> <p>For example, Mr. or Mrs.</p> |
| Primary email | String | Email address of the patient to which any correspondence is sent. |
| Race | Choice list | <p>Race of the patient.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • American Indian or Alaska Native • Asian • Black or African American • Native Hawaiian or Other Pacific Islander • Other Race • Unable to report due to do policy/law • White |
| Research consent given | True/False | Option to indicate that the patient has given consent to take part in research programs. |
| Secondary email | String | Alternative email address of the patient. |
| SMS consent given | True/False | Option to indicate that the patient has given consent to be communicated with via SMS. Protected health information is shared only if indicated. |

Patient table fields (continued)

| Field | Data type | Description |
|------------------------|-----------|---|
| Social security number | String | Last four digit of the social security number (SSN) of the patient for inclusion in medical documents. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Suffix | String | Part of the patient name that is acquired as a title due to academic, legal, employment or nobility status, and that appears at the end of the name. For example, MD or PhD. |
| Work phone | String | Work phone number of the patient. |

Policy table

The Policy [sn_hcls_policy] table stores the details of a policy shared with patients in the Healthcare and Life Sciences applications.

Key features

- Includes the consent number and date, patient name, policy type, status, and whether the consent was signed by a household member.
- Refers to the Document Template [sn_doc_template] table.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Policy table fields

| Field | Data type | Description |
|-------------------|------------|---|
| Active | True/False | Option to indicate that the policy is in use. |
| Document template | Reference | Document template to generate standard letters or documents associated with the policy. This field is used only when the Policy type field is set to Document template . i Note: You can associate only one active policy with a document template. For more information, see Configuring document templates for Healthcare and Life Sciences Service Management Core . |

Policy table fields (continued)

| Field | Data type | Description |
|----------------------|-------------|---|
| External policy link | URL | External reference to the policy included in a consent scope. |
| Number | String | <p>Alpha-numeric profile identifier of the policy.</p> <p>The value is auto-generated and is incremented every time you add a new policy to your ServiceNow instance. The initial value for the Number field is POL00001000.</p> <p>i Note: To customize the number, define the auto-numbering format for the Policy [sn_hcls_policy] table. For more information, see Add auto-numbering records in a table.</p> |
| Policy category | Choice list | <p>Category of a policy.</p> <p>The following categories are available by default:</p> <ul style="list-style-type: none"> • Registration • Advance care directive • Do not resuscitate • Emergency only • Health care directive • Notice of privacy practices • Information disclosure • Patient consent • Privacy policy acknowledgment document • Privacy policy organization document <p>For more information about the available categories, see consent category value set defined in the FHIR specifications.</p> |
| Policy name | String | Name to identify the policy. |
| Policy type | String | <p>Type of the policy.</p> <p>A policy is one of the following types:</p> <ul style="list-style-type: none"> • Standard: A policy that doesn't require a consent form to be signed by a patient. • Document template: A policy that requires a consent form to be signed by a patient. <p>With the Document template policy type, a to-do item is created for the patient to sign the consent form.</p> |

Policy table fields (continued)

| Field | Data type | Description |
|-----------------------------|-------------|--|
| Scope | Choice list | <p>Type of consent included in the policy.</p> <p>The following scope types are available by default:</p> <ul style="list-style-type: none"> • Advance care directive • Research • Privacy consent • Treatment <p>For more information about the available scopes, see consent scope value set defined in the FHIR specifications.</p> |
| Validity duration (in days) | String | Number of days the policy is valid for after a patient signs the policy. |

Policy consent table

The Policy consent [sn_hcls_policy_consent] table stores the details of a consent accepted by a patient or a household member on behalf of the patient.

Key features

- Includes the consent number and date, patient name, policy type, status, and whether the consent was signed by a household member.
- Refers to the Policy [sn_hcls_policy], Healthcare organization [sn_hcls_organization], Healthcare case [sn_hcls_case], and Patient [sn_hcls_patient] tables.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Policy consent table fields

| Field | Data type | Description |
|---------------------|-----------|--|
| Case | Reference | Healthcare case associated with the policy. |
| Consent date | Date/Time | Date and time when the consent was accepted. |
| External identifier | String | Identifier of the record in an electronic medical record (EMR) system. |
| Number | String | Alpha-numeric profile identifier of the consent. |

Policy consent table fields (continued)

| Field | Data type | Description |
|----------------------------|-------------|---|
| | | <p>The value is auto-generated and is incremented every time you add a new consent to your ServiceNow instance. The initial value for the Number field is CON00001000.</p> <p>i Note: To customize the number, define the auto-numbering format for the Policy consent [sn_hcls_policy_consent] table. For more information, see Add auto-numbering records in a table.</p> |
| Patient | Reference | Individual establishing their personal consent. |
| Policy | Reference | Policy covered by the consent. |
| Status | Choice list | <p>Status of a consent.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Active • Draft • Inactive • Proposed • Rejected <p>For more information about the available categories, see consent state value set defined in the FHIR specifications.</p> |
| Signed by household member | True/False | Option to indicate that the consent was provided by a household member of the patient. |
| Valid until | Date | <p>Date until which the policy is valid for a patient. The valid until date is calculated based on validity duration of the policy after the date on which the consent was given.</p> <p>i Note: The Status field value is updated as active or inactive based on the Valid until date.</p> |

Practitioner table

The Practitioner [sn_hcls_practitioner] table stores the details of a practitioner in your healthcare organization.

Key features

- Models a healthcare practitioner data object.
- Includes the name, gender, date of birth, and contact information like phone numbers and emails of practitioners.
- Includes a reference to the sys_user entry for a practitioner to log in to a ServiceNow instance to perform tasks.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Practitioner table fields

| Field | Data type | Description |
|-----------------|-------------|--|
| Active | True/False | Option to indicate that the practitioner is associated with your healthcare organization. |
| City | String | City in which the practitioner is located. |
| Country | String | Country in which the practitioner is located. |
| Date of birth | Date | Birth date of the practitioner. |
| District | String | District of the city in which the practitioner is located. |
| Effective from | Date | Start date of the period during which the practitioner is authorized to perform in the location. |
| Effective until | Date | End date of the period during which the practitioner is authorized to perform in the location. |
| Ethnicity | Choice list | <p>Ethnic group the practitioner identifies with.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Hispanic or Latino • Not Hispanic or Latino • Unable to report due to do policy/law |
| First name | String | First name of the practitioner. |
| Gender | Choice list | <p>Gender of the practitioner.</p> <p>The following types are available by default:</p> |

Practitioner table fields (continued)

| Field | Data type | Description |
|------------------------|-------------|--|
| | | <ul style="list-style-type: none"> • Female • Male • Non binary • Not disclosed • Other |
| Home phone | String | Home phone number of the practitioner. |
| Last name | String | Last name of the practitioner. |
| Mobile phone | String | Mobile phone number of the practitioner. |
| Name | String | Name to identify the practitioner. |
| Number | String | <p>Alpha-numeric profile identifier of the practitioner.</p> <p>The value is auto-generated and is incremented every time you add a new practitioner to an instance. The initial value for the Number field is PRACT00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Practitioner [sn_hcls_practitioner] table. For more information, see Add auto-numbering records in a table.</p> |
| Practitioner id or NPI | String | Identifier that applies to the person in the practitioner role. |
| Prefix | String | <p>Part of the practitioner name that is acquired as a title due to academic, legal, employment or nobility status, and that appears at the start of the name.</p> <p>For example, Doctor or Dr.</p> |
| Primary email | String | Email address of the practitioner to which any correspondence is sent. |
| Race | Choice list | <p>Race of the practitioner.</p> <p>The following types are available by default:</p> |

Practitioner table fields (continued)

| Field | Data type | Description |
|--------------------|-----------|---|
| | | <ul style="list-style-type: none"> • American Indian or Alaska Native • Asian • Black or African American • Native Hawaiian or Other Pacific Islander • Other Race • White <p>Unable to report due to do policy/law</p> |
| Secondary email | String | Alternative email address of the practitioner. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| State or province | String | State or province in which the practitioner is located. |
| Street address | String | Mailing street address of the practitioner. |
| Suffix | String | <p>Part of the practitioner name that is acquired as a title due to academic, legal, employment or nobility status, and that appears at the end of the name.</p> <p>For example, M.D. (Physician)</p> |
| Work email | String | Email address of the practitioner associated with the practitioner's business profile. |
| Work phone | String | Work phone number of the practitioner. |
| Zip or Postal code | String | ZIP or postal code for the practitioner. |

Practitioner location table

The Practitioner location [sn_hcls_practitioner_facility] table stores the details of the location at which a practitioner provides healthcare services.

Key features

- Links the practitioner to a healthcare location.
- Enables providing a date range for that practitioner and location association.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Practitioner location table fields

| Field | Data type | Description |
|-----------------|------------|--|
| Active | True/False | Option to indicate whether the location is associated with the practitioner. |
| Effective from | Date | Start date of the period during which the practitioner is authorized to perform in the location. |
| Effective until | Date | End date of the period during which the practitioner is authorized to perform in the location. |
| Organization | Reference | Identity of the organization the practitioner represents or acts on behalf of. |
| Practitioner | Reference | Person added as the practitioner. |
| Location | Reference | The associated practitioners location name. |

Practitioner location specialty table

The Practitioner location specialty [sn_hcls_pract_location_specialty] table stores the details about types of services that a practitioner can provide for an organization at a specific location.

Key features

- Links the practitioner location object to a specific care specialty and also the practitioner type.
- Enables indicating whether location is the primary specialty for a practitioner.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Practitioner location specialty table fields

| Field | Data type | Description |
|-----------------------|------------|---|
| Active | True/False | Option to indicate whether the location and specialty mapping is in use. |
| Practitioner location | Reference | Location at which a practitioner provides a care specialty. |
| Practitioner type | Reference | Type of the practitioner. |
| Primary specialty | True/False | Option to indicate whether the specialty is the main specialty care provided at the location by a practitioner. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Specialty | Reference | Specialty of the practitioner. |

Practitioner specialty table

The Practitioner specialty [sn_hcls_practitioner_specialty] table stores the association details of a specialty with a practitioner.

Key features

- Links the practitioner to multiple care specialties that the practitioner specializes in.
- Enables supported care specialties models in the Healthcare code set [sn_hcls_code_set] table.
- Provides a reference to the practitioner and the code set of type care specialty.
- Includes a reference to the practitioner type (also modeled as a code set).
- Enables indicating whether location is the primary specialty for a practitioner.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Practitioner specialty table fields

| Field | Data type | Description |
|--------|------------|---|
| Active | True/False | Option to indicate whether the specialty is associated with the practitioner. |

Practitioner specialty table fields (continued)

| Field | Data type | Description |
|-------------------|-----------|--|
| Practitioner | Reference | Person added as the practitioner. |
| Practitioner type | Reference | Type of the practitioner. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Specialty | Reference | Specialty of the practitioner. |

Pre-authorization diagnosis table

The Pre-authorization diagnosis [sn_hcls_pre_auth_diagnosis] table stores diagnosis information pertaining to a pre-authorization for healthcare services.

Key features

- Stores the diagnosis code for use with pre-authorizations.
- Includes both pre-authorization and diagnosis information.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Pre-authorization diagnosis table fields

| Field | Data type | Description |
|---------------------------|-----------|---|
| Pre-authorization request | Reference | Associated pre-authorization request. |
| Pre-authorization item | Reference | Associated pre-authorization item. |
| Diagnosis code | Reference | Code used to indicate the diagnosis given by a healthcare practitioner. |

Pre-authorization item table

The Pre-authorization item [sn_hcls_pre_auth_item] table stores the details of items pertaining to a pre-authorization request for healthcare services.

Key features

- Stores item information related to pre-authorization requests and pre-authorization diagnoses.
- Includes the item order, associated pre-authorization request, and procedure code.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Pre-authorization item table fields

| Field | Data type | Description |
|---------------------------|-----------|--|
| Pre-authorization request | Reference | Associated pre-authorization request number. |
| Item order | String | The item being ordered. |
| Procedure code | Reference | <p>Code to identify the specific procedure. Code is based on the Current Procedural Terminology (CPT) or Healthcare Common Procedure Coding System (HCPCS) coding system.</p> <p>For more information about the available codes, see procedure codes defined in the FHIR specifications.</p> |
| Start date | Date | Expected item start date. For example, a treatment's start date. |
| End date | Date | Expected item end date. For example, a treatment's end date. |
| Remarks | String | Comments or additional information about the pre-authorization item. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |

Pre-authorization request table

The Pre-authorization request [sn_hcls_pre_auth_header] table stores the authorization request details for a healthcare service provided by a payer organization.

Key features

- Stores the pre-authorization request details for a healthcare service provided by a payer organization.
- Enables pre-authorizing healthcare service for a patient.
- Includes the pre-authorization number, pre-authorization type, pre-authorization effective dates, and healthcare service order details.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Pre-authorization request table fields

| Field | Data type | Description |
|-------------------|-------------|--|
| Case | Reference | Healthcare case associated with the ordered healthcare service for the patient. |
| Review type | Choice list | <p>Category of the healthcare service.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> • Routine: A healthcare service customarily administered by a practitioner and can be scheduled in advance based on the patient's and practitioner's preference. • Elective: An optional healthcare service that can be scheduled at any time in the future based on the patient's and practitioner's preference. • Urgent: A required healthcare service that is considered urgent and must be scheduled immediately. • Non urgent: A healthcare service that isn't considered urgent and can be scheduled in the near future. |
| Date approved | Date | Date when the pre-authorization request was approved by the payer organization. |
| Date fax received | Date/Time | Date and timestamp on a fax received for the pre-authorization request. |
| Insurance | Reference | Member plan associated with the patient. |
| Patient | Reference | Patient on whose behalf the pre-authorization request was submitted. |
| Place of service | Reference | Location of service rendered. |

Pre-authorization request table fields (continued)

| Field | Data type | Description |
|---------------------------|-------------|--|
| Primary pre-auth number | String | Primary pre-authorization number generated by the payer organization. |
| Reason | String | Reason for the pre-authorization request. |
| Referring practitioner | Reference | Practitioner who recommended the healthcare service associated with the pre-authorization request. |
| Remarks | String | Comments or additional information about the pre-authorization request. |
| Rendering practitioner | Reference | Provider rendering the service. |
| Secondary pre-auth number | String | Secondary pre-authorization number generated by the payer organization. |
| Short description | String | A short description of this pre-authorization request. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Status | Choice list | <p>Approval status of the pre-authorization request.</p> <p>The following types are available by default:</p> <ul style="list-style-type: none"> Draft: Pre-authorization request is yet to be submitted. Pending: Pre-authorization request is submitted for review to the payer organization. Approved: Pre-authorization request was approved by the payer organization. Denied: Pre-authorization request was denied by the payer organization. Completed: Pre-authorization request was completed with one or more items were denied in the request. |
| Review type | String | <p>Type of the healthcare service requested in the pre-authorization request.</p> <p>The following types are available by default:</p> |

Pre-authorization request table fields (continued)

| Field | Data type | Description |
|-------------|-----------|--|
| | | <ul style="list-style-type: none"> • Medical • Prescription • New |
| Valid from | Date | Start date of the pre-authorization request validity period. |
| Valid until | Date | End date of the pre-authorization request validity period. |

Procedure table

The Procedure [sn_hcls_procedure] table stores the information about an action that is or was performed on or for a patient. An action can be a physical intervention like an operation, or less invasive like long-term services, counseling, or hypnotherapy.

Key features

- Stores any medical procedures associated with a patient.
- Includes the procedure code, status, category, date performed, location, and performing practitioner.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Procedure table fields

| Field | Data type | Description |
|----------|-------------|--|
| Category | Choice list | <p>Code that classifies a procedure for searching, sorting, and display purposes.</p> <p>The following categories are available by default:</p> <ul style="list-style-type: none"> • Psychiatry procedure or service • Counselling • Education • Surgical procedure • Diagnostic procedure • Chiropractic manipulation • Social service procedure <p>For more information about the available types, see procedure categories defined in the FHIR specifications.</p> |

Procedure table fields (continued)

| Field | Data type | Description |
|---------------------|-------------|--|
| Date performed | Date/Time | Date and time when the procedure was performed. |
| Encounter | Reference | Encounter created as part of procedure. |
| External id | String | Identifier of the record in an electronic medical record (EMR) system. |
| Healthcare location | Reference | Healthcare location where the procedure happened. |
| Number | String | <p>Alpha-numeric profile identifier of the procedure.</p> <p>The value is auto-generated and is incremented every time you add a new procedure to your ServiceNow instance. The initial value for the Number field is PRCD00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Procedure [sn_hcls_procedure] table. For more information, see Add auto-numbering records in a table.</p> |
| Observation | Reference | Observation recorded as part of procedure. |
| Parent | Reference | Parent healthcare event associated with the procedure. |
| Patient | Reference | Patient involved in the procedure. |
| Practitioner | Reference | Practitioner involved in the procedure. |
| Procedure code | Reference | <p>Code to identify the specific procedure. Code is based on the Current Procedural Terminology (CPT) or Healthcare Common Procedure Coding System (HCPCS) coding system.</p> <p>For more information about the available codes, see procedure codes defined in the FHIR specifications.</p> |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Status | Choice list | <p>Status of a procedure.</p> <p>The following statuses are available by default:</p> |

Procedure table fields (continued)

| Field | Data type | Description |
|-------|-----------|---|
| | | <ul style="list-style-type: none"> • Completed • Entered In Error • In Progress • Not Done • On Hold • Preparation • Stopped • Unknown <p>For more information about the available statuses, see event statuses defined in the FHIR specifications.</p> |

Program table

The Program [sn_hcls_program] table stores the programs offered by healthcare organizations.

Key features

- Extends the Product Specification [sn_prd_pm_product_specification] table to model all programs available from healthcare organizations.
- Includes the program name, eligibility criteria, medication product, and duration of the program.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Program table fields

| Field | Data type | Description |
|----------------------|------------|---|
| Active | True/False | Option to indicate that the program is in use. |
| Eligibility criteria | Reference | Checklist associated with the program. |
| End Date | Date | End date of the program duration. |
| Medication product | List | Medication product associated with the program. |

Program table fields (continued)

| Field | Data type | Description |
|-------------|-----------|--|
| Name | String | Name of the program |
| Number | String | <p>Alpha-numeric identifier of the program.</p> <p>The value is auto-generated and is incremented every time you add a new program to an instance. The initial value for the Number field is PSSPG00001001.</p> <p>Note: To customize the number, define the auto-numbering format for the Program [sn_hcls_program] table. For more information, see Add auto-numbering records in a table.</p> |
| Start Date | Date | Start date of the program duration. |
| State | String | Status of the program as Draft or Published . |
| Description | String | Brief description of the program as would be shown on the case name created for the program. |

Program relationship table

The Program relationship [sn_hcls_program_relationship] table stores the association details between a program and program service.

Key features

- Extends the Specification Relationship [sn_prd_pm_specification_relationship] table to define the relationship between a program and program service.
- Includes the relationship name, program, program service, and relationship type.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Program relation table fields

| Field | Data type | Description |
|--------|------------|--|
| Active | True/False | Option to indicate that the association between a program and a program service is in use. |
| Name | String | Name of the relationship between a program and a program service. |

Program relation table fields (continued)

| Field | Data type | Description |
|----------------------|-----------|---|
| Source Specification | Reference | Program included in the relationship. |
| Target Specification | Reference | Program service included in the relationship. |
| Relationship Type | String | Relationship type between program and program services. |

Program service table

The Program service [sn_hcls_program_service] table stores the program services associated with a program.

Key features

- Extends the Product Specification [sn_prd_pm_product_specification] table to model all program services available within a program.
- Includes the program service name and duration of the program service.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Program service table fields

| Field | Data type | Description |
|----------|------------|---|
| Active | True/False | Option to indicate that the program service is in use. |
| End Date | Date | End date of the program service duration. |
| Name | String | Name of the program service |
| Number | String | Alpha-numeric identifier of the program service. The value is auto-generated and is incremented every time you add a new program service to an instance. The initial value for the Number field is PGSRV00001001. |

Program service table fields (continued)

| Field | Data type | Description |
|-------------|-----------|---|
| | | i Note: To customize the number, define the auto-numbering format for the Program service [sn_hcls_program_service] table. For more information, see Add auto-numbering records in a table . |
| Start Date | Date | Start date of the program service duration. |
| State | String | Status of the program service as Draft or Published . |
| Description | String | Brief description of the program service. |

Source system table

The Source system [sn_hcls_source_system] table stores the source and destination IDs of an external healthcare system in your ServiceNow instance.

Key features

- All Healthcare and Life Sciences Service Management Core data tables contain a reference to the Source system [sn_hcls_source_system] table.
- Includes the source and destination IDs of external EMR systems or another healthcare system.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Source system

| Field | Description |
|----------------|---|
| Source ID | ID of the external Redox healthcare system used for processing an inbound API response from the system to your ServiceNow instance. |
| Destination ID | ID of the external Redox healthcare system used for sending an outbound API request to the system from your ServiceNow instance. |
| Source | Name to identify the external Redox healthcare system as a source system in your ServiceNow instance. |

Update insurance information table

The Update insurance information [hcls_insurance_info_task] table stores the task details for updating the insurance information of a patient in your healthcare organization.

Key features

- Extends the Healthcare Task [sn_hcls_task] table to store task details created for updating the insurance information of a patient.
- Includes the payment type, insurance company, insurance plan, member number, group number, Rx Bin, Rx Group, Rx PCN.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Update insurance information table fields

| Field | Data type | Description |
|-------------------------|-----------|--|
| Group number | String | Group number or policy number of the member. |
| Insurance company | Reference | Name of the company listed as a payer organization. |
| Medical insurance model | Reference | Payer plan associated with the patient. |
| Member number | String | Unique ID number of the patient that enables healthcare providers to verify insurance coverage and arrange payment for services. |
| Number | String | Alpha-numeric profile identifier of the member plan. |
| Patient | Reference | Name of the patient in whose name is the plan. |
| Rx Bin | String | Number to identify how a prescription drug will be reimbursed and where a pharmacy can send a reimbursement claim to. |
| Rx Group | String | Alphanumeric or numeric value of the member plan that is used to process prescription benefits. |
| Rx PCN | String | Processor control number (PCN) is another identifier used to route pharmacy reimbursements. |

Vaccine product table

The Vaccine product [sn_hcls_vaccine_product] table stores the models of all the supported vaccine products.

Key features

- Extends the Consumable Model [cmdb_consumable_product_model] table to model all the supported vaccine products.
- Includes the name and CVX and MVX codes for the vaccine.
- Maps the manufacturer field from the Consumable Model [cmdb_consumable_product_model] table to the healthcare organization manufacturing the vaccine.

Role required to configure the table: sn_hcls.admin.

For more information, see [Healthcare and Life Sciences data model](#).

Vaccine product table fields

| Field | Data type | Description |
|-----------------|-----------|--|
| CVX code | String | Numeric string that identifies the type of vaccine product used. |
| CVX description | String | Description of the product used in the vaccine. |
| Manufacturer | Reference | Company that built the vaccine. |
| MVX code | String | Alphabetic string that identifies the manufacturer of that vaccine. |
| Name | String | Name of the vaccine. |
| Sale NDC11 | String | Sale NDC11 value of the vaccine. |
| Source | Reference | Source system details of an external healthcare system in a ServiceNow instance. |
| Use NDC11 | String | Use NDC11 value of the vaccine. |

Patient Portal widget library

Widgets included with the Patient Portal enable you to customize their data and appearance or refer to them as a basic code sample when building your own widgets.

To view the instance options for a widget, use the widget context menu.

Appointment reminder card widget

The Appointment reminder card widget displays the next appointment reminder for the logged-in user.

Appointment reminder card widget



Key features

- Appears only for a logged-in user with the personal information completed.
- By default, shows a reminder for the next upcoming appointment only.
- Shows the appointment details when a user clicks **See details** on the widget.

The Appointment reminder card widget does not include instance options.

COVID-19 status widget

The COVID-19 widget displays the status for the COVID-19 vaccination doses that logged-in user has either taken or self-reported and any COVID test results.

COVID-19 status widget

COVID-19 status

[View details](#)



Scan the QR code to share your COVID-19 status

Vaccination status

Unknown

[Report vaccination](#)

Test result

Positive

Test conducted on
2021-12-28

[Report test result](#)

Key features

- Appears only for a logged-in user with the personal information completed and when the Vaccine Administration Management application is installed.
- By default, shows the QR code for the COVID-19 vaccination status, vaccination status, and the result of the COVID test. When the vaccination status is unknown, shows the link to report vaccination status. When the COVID test result is positive or no result, shows the link to report the latest test result.
- Shows the COVID-19 vaccination status and test result details when a user clicks **View details** on the widget.

The COVID-19 status widget does not include instance options.

Faq widget

The Faq widget displays a list of frequently asked questions (FAQ) articles for a patient.

Faq widget

Frequently asked questions

[I am pregnant, can I still get the COVID vaccine?](#)

Yes, COVID-19 vaccines currently authorized by the Food and Drug Administration (FDA) are recommended for pregnant and lactating individuals as well as those trying or intending to

[Is there a risk of severe allergic reaction if I receive the vaccine?](#)

Severe allergic reactions to vaccines are rare and difficult to predict, generally occurring at a rate of approximately one event per million administrations. This topic review focuses on allergic

[Can I get COVID-19 vaccine at the same time as another vaccine?](#)

People should be offered vaccination regardless of their history of symptomatic or asymptomatic SARS-CoV-2 infection; this includes people with prolonged post-COVID-19

Key features

- Displayed for both logged-in and non-logged-in users.
- By default, shows maximum of five FAQ articles from the Healthcare and Life Sciences knowledge base.

Faq widget instance options

≡ Faq

Presentation

Bootstrap color

Default

Show star rating

No

Other Options

Number of articles to display per page

5

Faq widget instance options fields

| Field | Description |
|---------------------|---|
| Presentation | |
| Bootstrap color | Color scheme of the widget header. Select a color for your widget from a list of common bootstrap colors. |
| Show star rating | Option to show a star rating on the FAQ article. |

Faq widget instance options fields (continued)

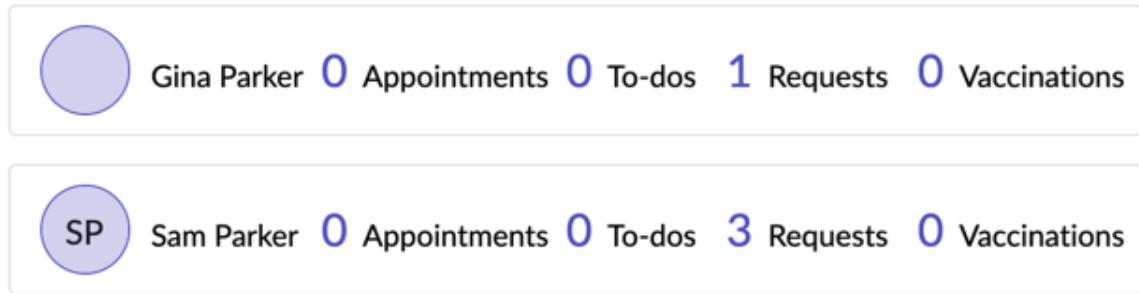
| Field | Description |
|--|---|
| Other Options | |
| Number of articles to display per page | Maximum number of articles that appear on the widget. The default value is 3 . |

Household widget

The Household widget displays a list of household members that the logged in user is authorized representative for.

Household widget

Household

[View all](#)


Key features

- Appears only for a logged-in user with the personal information completed and who has household members.
- By default, shows maximum of two household members in ascending order by their name and their details including the number of upcoming appointments, to-do items, open requests, and recommended vaccinations. The number for each item is linked to the details page for that item.
- Shows all household members that the logged-in user is an authorized representative for and the household member details when user clicks **View all** on the widget.

The Household widget does not include instance options.

News and Articles widget

The News and Articles widget displays a list of articles that are accessible to patients.

News and Articles widget

Latest news & articles

 Article

Eight Ways to Build Wellness into Your Business Wellness programs.

Wellness programs have had a place in large companies for more than a decade. Typically, they are well-intentioned...

19d ago

Key features

- Displayed for both logged-in and non-logged-in users.
- By default, shows maximum of four articles from the Healthcare and Life Sciences knowledge base.

News and Articles widget instance options

≡ News and Articles

Data

topic

Select list of taxonomy content configurations

Knowledge

Presentation

Number of articles to display per page

4

News and Articles widget instance options fields

| Field | Description |
|--|--|
| Data | |
| Topic | Category of the article. |
| Select list of taxonomy content configurations | List of taxonomy content configurations. |

News and Articles widget instance options fields (continued)

| Field | Description |
|--|---|
| Presentation | |
| Number of articles to display per page | Maximum number of articles that appear on the widget. The default value is 3 . |

Open requests widget

The Open requests widget displays a list of open requests including healthcare-related cases created for the patient.

Open requests widget

Open requests [View all](#)



Key features

- Displayed only for a logged-in user with the personal information completed.
- By default, shows maximum of two records from the application case table that extends the Healthcare case [sn_hcls_case] table in ascending order by the date created. Examples for the application case table include the Procedure request [sn_previsit_procedure_request] table available with the Pre-Visit Management application and the Enrollment case [sn_patientservice_enroll_case] table available with the Patient Support Services application.
- Shows all the pending and closed requests in the respective sections when a user clicks **View all** on the widget.

The Open requests widget does not include instance options.

Pending to-dos widget

The Pending to-dos widget displays a list of to-do items assigned to a patient.

Pending to-dos widget

Pending to-dos [View all](#)

Procedure consent for TPA sur
HC008953 • an hour

HIPAA consent
HC006850 • 4d

Key features

- Displayed only for a logged-in user with the personal information completed.
- By default, shows maximum of two records from the Healthcare Task [sn_hcls_task] table in ascending order by the date created.
- Shows all the pending and closed to-do items in the respective sections when a user clicks **View all** on the widget.

The Pending to-dos widget does not include instance options.

Vaccinations widget

The Vaccinations widget displays a list of vaccines recommended for the logged-in user.

Vaccinations widget

Vaccinations [View all](#)

It's time to schedule these vaccinations

Flu vaccination - Annual dose

COVID-19 - First dose

Schedule vaccination

Key features

- Displayed only for a logged-in user with the personal information completed and when the Vaccine Administration Management application is installed.
- By default, shows maximum of three programs from the vaccination programs list that the user is eligible for in ascending order by the date administered.
- Shows all the suggested and completed vaccinations in the respective sections when a user clicks **View all** on the widget.

Vaccinations widget instance options

Vaccinations

Other Options

limit item

5

Vaccinations widget instance options fields

| Field | Description |
|------------|---|
| Limit item | Maximum number of vaccination programs that appear on the widget. The default value is 3 . |

Healthcare organization form

The Healthcare organization form includes the details of a healthcare organization.

Healthcare organization form fields

| Field | Description |
|-------------------|---|
| Name | Name to identify the healthcare organization. |
| Organization type | Type of healthcare organization you represent. For more information about the available organization types, see organization types defined in the FHIR specifications. |
| Internal | Option to indicate that the organization is internal. |
| Organization id | Unique identifier for the organization. |
| Parent | Parent organization associated with the organization. |
| Street | Mailing street address of the organization. |
| City | City in which the organization is located. |
| State / Province | State or province in which the organization is located. |

Healthcare organization form fields (continued)

| Field | Description |
|-------------------|---|
| Zip / Postal code | ZIP or postal code for the organization. |
| Phone | Phone number of the organization. |
| Fax phone | Fax number of the organization. |
| Notes | Any information about the organization that would be useful for others to know. |

Medication Prescription form

The Medication Prescription form includes the details of the prescription ordered for a patient.

Medication Prescription form fields

| Field | Description |
|----------------------------|--|
| Medication Prescription | |
| Number | Auto-generated number for the prescription. |
| Patient | Name of the patient to whom the medication will be given. |
| Medication product | Medication product being prescribed for the patient. |
| Practitioner | Name of the practitioner who ordered the prescription for the patient. |
| Prior prescription | Prescription ordered earlier for the patient. |
| Reference Medication event | Encounter that identifies the occurrence of contact between patient and healthcare provider. |
| Organization | Healthcare provider that is responsible for the prescription. |

Medication Prescription form fields (continued)

| Field | Description |
|-------------------------|---|
| Medication Prescription | |
| Dosage specification | <p>Dosage specification for the patient.</p> <p>i Note: This field is set as mandatory only when a program is associated with the case. In this case, the medication prescription is entered according to the dosage specification published for the program.</p> |
| Status | <p>Status of the ordered prescription.</p> <p>The following statuses are available by default:</p> <ul style="list-style-type: none"> • Active • Draft • Cancelled • Completed • Entered in error • Expired • On-Hold • Stopped • Unknown <p>For more information about the available statuses, see medication prescription statuses defined in the FHIR specifications.</p> |
| Status reason | Explanation of the selected status. |
| Priority | Urgency of the prescription that is used to make informed decision if needing to be prioritized. |
| Date authored | Date and time when the prescription was written. |
| Validity start date | Earliest time of the validity period of the prescription. |
| Validity end date | Latest time of the validity period of the prescription. |
| External ID | Identifier of the record in an electronic medical record (EMR) system. |

Medication Prescription form fields (continued)

| Field | Description |
|--|---|
| Medication Prescription | |
| Case | Enrollment case associated with the prescription. |
| Diagnosis details | |
| When a program is associated with the case, each field in this section is automatically set to its corresponding value included in the program. | |
| Primary diagnosis | Main condition in a patient submitted by the practitioner as the reason for the healthcare service requested. |
| Tertiary diagnosis | Highly specialized medical care recommended for the patient by the practitioner. |
| Secondary diagnosis | Coexisting condition that might exist in a patient submitted by the practitioner. |
| Dosage characteristics | |
| This section appears only when a dosage specification is associated with the medication prescription. The section displays dosage characteristics configured by your administrator for the selected dosage specification. | |
| Dosage details | |
| This section is automatically populated when a dosage specification is selected for the medication prescription. The fields within this section are read-only and populated corresponding to their dosage characteristics. When no dosage specification is selected, the section displays the value as entered by a healthcare representative. | |
| Dosage | Recommendation of the medication dosage. |
| Quantity | Quantity of the specified medication in one fill. |
| Number of authorized refills | Number of authorized refills for the medication. |
| Instructions for patient | Instructions for the dosage of the medication product. |

Policy form

The Policy form includes the details of a privacy policy associated with a healthcare case.

Policy form fields

| Field | Description |
|-----------------------------|---|
| Number | <p>Alpha-numeric profile identifier of the policy.</p> <p>The value is auto-generated and is incremented every time you add a new policy to your ServiceNow instance. The initial value for the Number field is POL00001000.</p> <p>i Note: To customize the number, define the auto-numbering format for the Policy [sn_hcls_policy] table. For more information, see Add auto-numbering records in a table.</p> |
| Policy category | This field should be set to Registration . |
| Policy type | <p>Type of the policy.</p> <p>A policy is one of the following types:</p> <ul style="list-style-type: none"> • Standard: A policy that doesn't require a consent form to be signed by a patient. • Document template: A policy that requires a consent form to be signed by a patient. <p>With the Document template policy type, a to-do item is created for the patient to sign the consent form.</p> |
| Validity duration (in days) | Number of days the policy is valid for after a patient signs the policy. |
| Active | Option for enabling the privacy policy. |
| Scope | <p>Type of consent included in the policy.</p> <p>For privacy consent, select Privacy consent. Else, this field should be left empty.</p> |
| Document template | <p>Document template to generate standard letters or documents associated with the policy.</p> <p>This field is used only when the Policy type field is set to Document template.</p> <p>i Note: You can associate only one active policy with a document template.</p> <p>For more information, see Configuring document templates for Healthcare and Life Sciences Service Management Core.</p> |

Policy form fields (continued)

| Field | Description |
|----------------------|---|
| External policy link | External reference to the policy included in a consent scope. |
| Policy name | Name to identify the policy. |
| Policy content | Content of the policy that should be read and accepted by the Patient Portal users at the time of registration. |

Pre-authorization request form

The Pre-authorization request form includes the details of the pre-authorization request provided by a payer for a patient.

Pre-authorization request form fields

| Field | Description |
|---------------------------|--|
| Primary pre-auth number | Primary pre-authorization number generated by the payer organization. |
| Secondary pre-auth number | Secondary pre-authorization number generated by the payer organization. |
| Primary diagnosis | Main condition in a patient submitted by the practitioner as the reason for the healthcare service requested in the pre-authorization request. |
| Medication prescription | Medication prescription for which the pre-authorization request is created for the patient. |
| Status | Approval status of the pre-authorization request. |
| Date approved | Date when the pre-authorization request was approved by the payer organization. |
| Valid from | Start date of the pre-authorization request validity period. |
| Valid until | End date of the pre-authorization request validity period. |
| Notes | Instructions or explanation for the pre-authorization request. |

Healthcare and Life Sciences Service Management Core properties

There are several advanced Healthcare and Life Sciences Service Management Core properties that you can configure for features used in Healthcare and Life Sciences applications.

These properties are available for Healthcare and Life Sciences Service Management Core.

Note: To open the System Properties [sys_properties] table, enter `sys_properties.list` in the navigation filter.

Properties for Healthcare and Life Sciences Service Management Core

| Property | Description |
|---|---|
| Comma separated list of all to-do task tables visible on a patient portal sn_hcls.to.do.tasks.list | Enter a list of task table names that are displayed as to-do items on a patient portal. For multiple entries, separate the task table names with commas. <ul style="list-style-type: none"> Type: string Default value: sn_doc_task,sn_hcls_insurance_info_task Location: System Property [sys_properties] table Learn more: Specify a to-do item for patients |
| Enables self registration on Healthcare patient Portal sn_hcls.enable_self_registration | Set the property to <code>True</code> to enable the self-registration feature in the Patient Portal. <ul style="list-style-type: none"> Type: true false Default value: true Location: System Property [sys_properties] table Learn more: Configure the self-registration feature on the Patient Portal |

Domain separation and Healthcare and Life Sciences Service Management Core

Domain separation is supported for Healthcare and Life Sciences Service Management Core. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see [Application support for domain separation](#).

Overview

Domain separation is available in the [Healthcare and Life Sciences data model](#) that is compatible with the Health Level Seven International (HL7) industry standard including the Fast Healthcare Interoperability Resources (FHIR) standard. The Healthcare and Life Sciences Service Management Core application includes domain separation for data tables including Patient [sn_hcls_patient] table, Appointment [sn_hcls_appointment] table, Immunization [sn_hcls_immunization] table, and others. In addition, domain separation is available for transactional data like healthcare tasks and healthcare cases.

How domain separation works in Healthcare and Life Sciences Service Management Core

For customers using the Healthcare and Life Sciences Service Management Core application to raise healthcare-related requests, the domain is set from the logged-in user's session, in the case or task created, and the associated healthcare data.

Use cases

When healthcare providers have their healthcare data separated by domains, the healthcare requests and corresponding fulfillment tasks are associated with the respective customer domains.

EMR Help

With the ServiceNow® EMR Help application, simplify and streamline the process to submit ServiceNow service requests related to an electronic medical record (EMR) system.

Request apps on the Store

Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#).

| Explore | Configure | Request |
|---|--|--|
|  <p>Learn about how clinicians and healthcare agents use EMR Help.</p> |  <p>Plan and configure your implementation.</p> |  <p>Submit ServiceNow service requests from EMR systems</p> |

| | |
|--|---|
| <p>Resolve</p>  <p>Resolve ServiceNow service requests from EMR systems</p> | <p>Reference</p>  <p>Get details about components like fields, tables, and properties.</p> |
|--|---|

Additional resources

- [Remote help request API](#)
- [EMR Help forum on the ServiceNow Community site](#)

Exploring EMR Help

Whether you're starting or expanding your implementation of the EMR Help application, learn more about features available to help create a seamless experience for your clinicians to raise requests from an external EMR system.

Overview

Optimize clinician time in delivering patient care by automating and routing EMR service requests from clinicians to the right teams. If an issue-reporting capability is not available within an EMR system, clinicians might not have time to report the issue, which results in unreported issues or delayed resolutions. Having to access a separate issue-reporting process takes clinician time away from patients and interrupts routine workflows.

For example, a clinician might encounter an IT or healthcare-related issue while viewing a patient record. With EMR Help, the clinician can request service directly within the EMR system which automatically creates a service request in a ServiceNow instance. Necessary details such as patient record are added automatically and the service agent can quickly and effectively solve the issues detected by the clinician.

The EMR Help application integrates an EMR system with your ServiceNow instance to enable clinicians to submit service requests from within the EMR system. An equivalent record is created in your ServiceNow instance for each service request. A healthcare agent can then look into and resolve such records from your ServiceNow instance.

Note: The healthcare case request capability can only be fulfilled for custom healthcare case types. In order to fulfill healthcare cases, you must first create your own custom healthcare case type. For more information on this, see [Configure healthcare case types for EMR Help](#).

Benefits

EMR Help provides the following benefits:

EMR Help Benefits

| Benefit | Key feature | Role |
|--|---------------------|--------------------|
| Save time by submitting requests to your ServiceNow instance directly from an EMR system. | EMR Help | Clinician |
| Enjoy improved visibility by tracking task-based records such as cases, incidents, or work orders. | EMR Help data model | Service Desk Agent |
| Provide encryption support to secure sensitive information. | Encryption | Administrator |
| Automatically transmit instance information to hospital service desk agents. | EMR Help | Service Desk Agent |

To get started with the EMR Help application, see [Configuring EMR Help](#).

EMR Help - IT Service Request Workflow scenario

Use the EMR Help application to integrate a ServiceNow instance with an EMR system and resolve IT service requests submitted by clinicians.

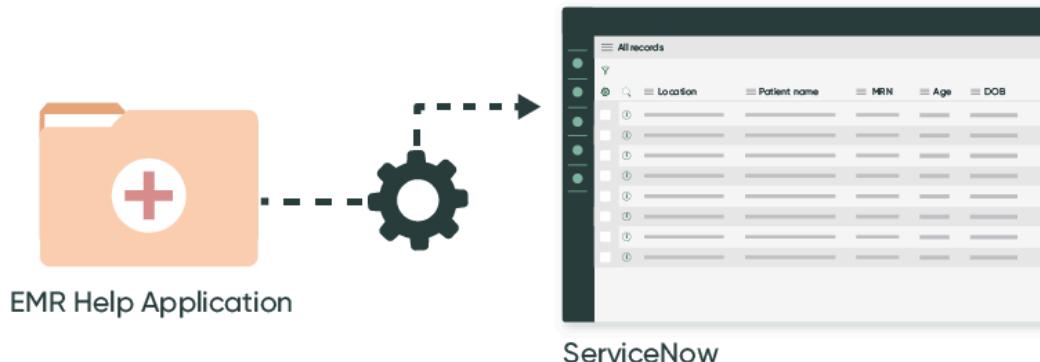
Scenario: An EMR system is integrated with a ServiceNow instance using the EMR Help application. As a result of this integration, a Help form is available within the EMR system to enable clinicians to submit IT service requests as incidents on the ServiceNow instance.

The following graphic shows how an IT agent resolves the clinician issue discussed in the scenario.

Using the EMR Help application to resolve the clinician issue

EMR Help

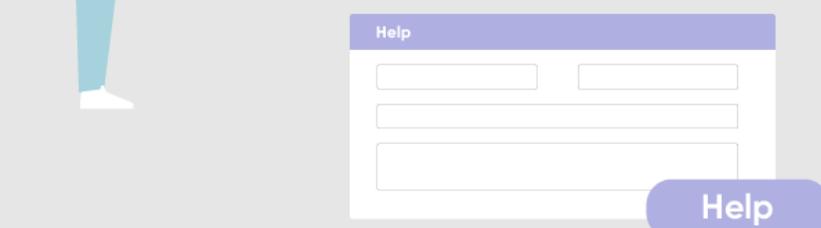
EMR system is integrated with a ServiceNow instance using the EMR Help application



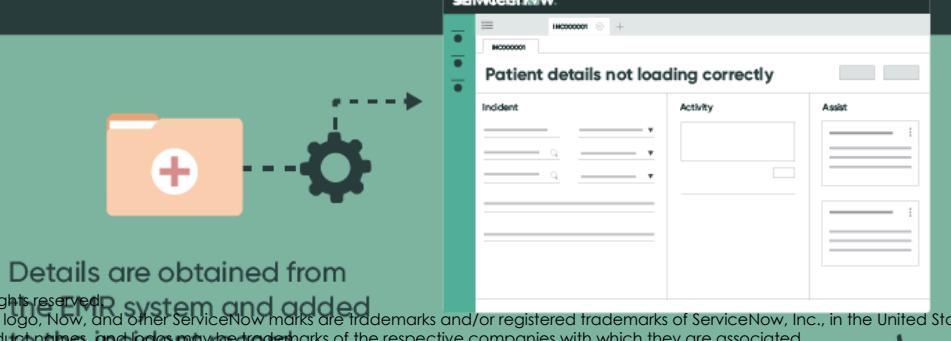
A clinician uses the EMR system to view details about the patient but experiences an issue with the patient record



The clinician submits a request for IT services using the Help form available in the EMR system



An incident record is created and assigned to an IT agent on the ServiceNow instance



The following workflow steps elaborate how an IT agent resolves a typical clinician issue:

1. When viewing the details of a patient in the EMR system, a clinician finds that the patient record is not loading correctly.
2. The clinician requests an IT service using the Help form available within the EMR system.
3. After the clinician submits the request, an incident record for the service request is created on the ServiceNow instance and assigned to an IT agent.
4. The EMR session details such as patient ID and clinician role are obtained from the EMR system and added to the incident record automatically. Using this additional information, the IT agent quickly finds out that the clinician is missing appropriate access in the EMR system.
5. The IT agent fixes the access issue for the clinician and resolves the incident.
6. The clinician verifies that the patient record is now displayed in the EMR system.

Related topics

[Exploring EMR Help](#)

[Configuring EMR Help](#)

[Submitting ServiceNow IT service requests from EMR systems](#)

[Viewing and resolving ServiceNow IT service requests submitted from EMR systems](#)

Configuring EMR Help

Set up the EMR Help application to address different types of clinician issues submitted from an EMR system.

EMR Help configuration tasks

| Task | Description |
|---|--|
| Install EMR Help. | Install the EMR Help application to integrate your ServiceNow instance with an EMR system. |
| Configure the data table for a request type. | <p>Review the data table associated with an IT request, such as the EMR Incident Data [sn_ind_rmt_help_incident_data] table, and make sure that the table has columns to store each system variable that you are planning to fetch from an EMR system. Add new columns corresponding to the system variables that do not exist in the table.</p> <p>If a data table for an IT request doesn't exist, create another data table by extending the Remote Request Data [sn_ind_rmt_help_request_data] table.</p> <p>For more information, see EMR Help data model and Table administration.</p> |
| Configure request parameters for EMR systems. | Configure the remote request parameters for an EMR system. |

EMR Help configuration tasks (continued)

| Task | Description |
|---|--|
| Configure request definitions for EMR systems. | Create or modify request definitions to support IT service requests from an EMR system. In addition, map the remote request parameters with the columns of the request data table associated with your task. |
| Assign roles for EMR Help users. | Assign roles to control access to features, capabilities, and data in the EMR Help application. |
| Configure healthcare case types for EMR Help. | Configure healthcare case types for EMR Help in order to fulfill service requests made from the EMR Help portal. The base healthcare case type [sn_hcls_case] is an abstract case type which provides a foundation to extend from when building your own healthcare case types. |
| Configure digest token authentication for EMR Help. | Configure ServiceNow single sign-on with Epic utilizing digest token authentication. |
| Configure iFrame support for EMR Help in ServiceNow | Configure EMR Help to launch within a frame in Epic Hyperspace and Hyperdrive. |
| Configure the EMR session info contextual sidebar. | Configure the EMR session info contextual sidebar in Workspace to manage the fields that display there. |
| Configuring the EMR Help service portal. | As an administrator, you can set up the EMR Help service portal for submitting IT service requests from an EMR system. |
| Set up the IT service request fulfillment process. | Manage IT service requests submitted from your EMR system by using either a dedicated service portal or a system support module. |
| (Optional) Implement encryption in EMR Help. | Encrypt fields, attachments, or both to secure your EMR system data. |

EMR Help configuration tasks (continued)

| Task | Description |
|---|--|
| (Optional) Customize the URL and REST API task parameters for EMR systems. | Use scripted extension points to manipulate URL parameters and REST API task parameters for an EMR system. |

i Note:

- To configure digest token authentication for EMR Help, see the [How to Configure Digest Token Authentication for EMR Help with Epic Hyperspace \[KB1002504\]](#) article in the Now Support Knowledge Base.
- To configure an Epic EMR system for EMR Help, see the [How to create the Epic piece for the EMR Help store application \[KB0964037\]](#) article in the Now Support Knowledge Base.
- To configure EMR Help to launch within an iframe in Epic Hyperspace and Hyperdrive, see the [How to configure EMR Help to launch within an iFrame in Epic Hyperspace and Hyperdrive \[KB1207128\]](#) article in the Now Support Knowledge Base.

Install EMR Help

You can install the EMR Help application (sn_ind_rmt_help) if you have the admin role. The application includes demo data.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Ensure that a ServiceNow ITSM Healthcare and Life Sciences Service Management Core package is already installed by an administrator.

Role required: admin

About this task

The following items are installed with EMR Help:

- Plugins
- Store applications
- Roles
- Tables

For more information, see [Components installed with EMR Help](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the EMR Help application (sn_ind_rmt_help) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#).

3. In the Application installation dialog box, review the application dependencies.

Dependent plugins and applications are listed if they will be installed, are currently installed, or need to be installed. If any plugins or applications need to be installed, you must install them before you can install EMR Help application.

4. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.

Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.

Important: If you don't load the demo data during installation, it's unavailable to load later.

5. Select **Install**.

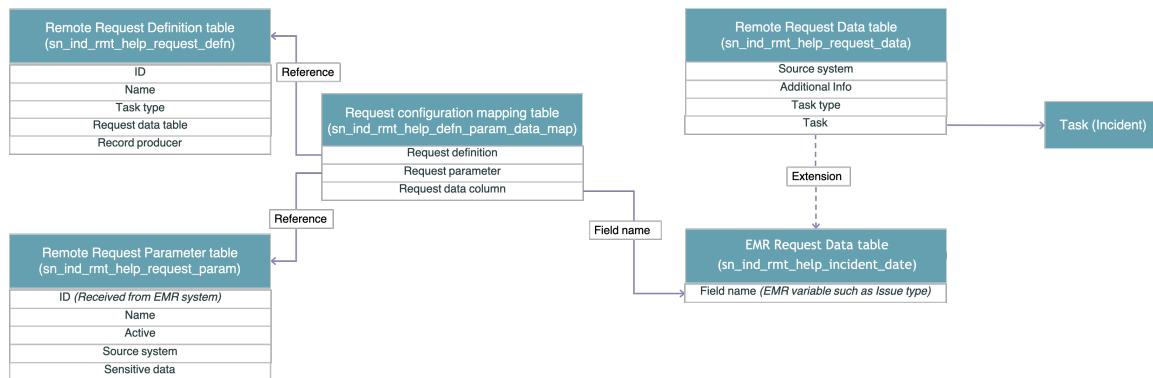
EMR Help data model

The EMR Help data model enables clinicians to submit service requests on your ServiceNow instance from an EMR system.

The EMR Help data model accesses only the EMR system data required to make the EMR Help application work.

The following diagram shows the tables and their columns, and the relationships between each table, that comprise the EMR Help data model.

EMR Help data model



The EMR Help data model uses a combination of tables to store data:

- Now Platform task tables such as the Incident [incident] table or Healthcare Case [sn_hcls_case].
- Tables included with the EMR Help application:
 - Remote request definition table
 - Remote request parameter table

- Remote request data table
- EMR Request Data table
- Request configuration mapping table

Example – Configuring the data table for a request type

Review the data table associated with a request, such as the EMR Request Data [sn_ind_rmt_help_incident_data] table, and make sure that the table has columns to store each system variable that you are planning to fetch from an EMR system.

Say, as an administrator, you want to include a system variable `encounter` from a Cerner EMR system in the EMR incident request type.

You would ensure that the `encounter` system variable appears on the incident request type by using the following workflow:

1. You review the EMR Request Data [sn_ind_rmt_help_incident_data] table by navigating to **All > System Definition > Tables** and selecting the table.
2. You check whether a column corresponding to the `encounter` system variable exists in the table.

You observe that the column does not exist.

3. You add a new column corresponding to the `encounter` system variable by clicking **New** in the Columns related list and filling in the column details associated with the `encounter` system variable on the Dictionary entry form and clicking **Submit**.

For more information, see [Dictionary entry form](#).

Configure request definitions for EMR systems

Create or modify request definitions to accept service requests from an EMR system on your ServiceNow instance.

Before you begin

- Set the application scope to EMR Help using the application picker. For more information, see [Application picker](#).
- Ensure that request parameters and equivalent columns for all request parameters exist in the Remote Request Data [sn_ind_rmt_help_request_data] table. For more information, see [Configure request parameters for EMR systems](#).

Role required: sn_ind_rmt_help.admin or admin

About this task

A request definition is a model of the request type originated from an EMR system. By default, the IT Service Request [sn_it_request] request definition is provided for task records of type Incident and mapped to the Cerner EMR system. The parameters associated with this request definition are also predefined and mapped to the columns in the Remote Request Data [sn_ind_rmt_help_request_data] table or its extended data table (for example, EMR Request Data [sn_ind_rmt_help_incident_data] table).

- Note:** A user with the `sn_ind_rmt_help.admin` role can't delete the predefined request definition and configuration mapping settings.

Procedure

1. Navigate to **All > EMR Help > Administration > Request Definitions**.
2. In the Remote Request Definitions list, modify an existing request definition or create another request definition.
 - To modify an existing request definition, click a request definition in the **ID** column of the Remote Request Definitions list.
 - To create another request definition, click **New** in the Remote Request Definitions list.
3. On the form, fill in the fields.

Remote Request Definition form

| Field | Description |
|---|---|
| ID | <p>Unique identifier for the request definition.</p> <p>i Note: You can't modify an ID after the request definition is created.</p> |
| Name | Name to identify the request definition. |
| Task type | <p>Task table associated with the IT service request.</p> <p>For example, Incident [incident] table.</p> |
| Request data table | <p>Data table to store additional data from the EMR system.</p> <p>Additional data might include environment, workstation, and other data from the EMR system.</p> |
| Record producer | <p>Record producer to modify the fields in a task record and make them available on an IT service request form.</p> <p>You use a record producer with a dedicated service portal.</p> |
| Rest API Task Parameters | |
| Parameters of scripted REST APIs. You use scripted REST APIs with system support modules. For more information, see Remote help request API . | |
| Task create parameters | Parameters of a task record available when creating an IT service request in the EMR system. |
| Task list parameters | Parameters of a task record available when viewing a list of IT service requests in the EMR system. |

| Field | Description |
|------------------------|--|
| Task detail parameters | Parameters of a task record available when viewing the details of an IT service request in the EMR system. |
| Task update parameters | Parameters of a task record available when updating an IT service request in the EMR system. |

i Note: To be able to enter Rest API task parameters, click the lock icon corresponding to the parameter type. For example, to enter task create parameters:

- a. Click the unlock task create parameters icon (🔓).
- b. Move the desired parameters from the available parameters in the **Available** column to the **Selected** column.
- c. Click the up or down icon to arrange the parameters in the order in which you want them to appear on the IT service request page of the EMR system, and then click the lock task create parameters icon (🔒).

4. Save the remote request definition settings.

- To save a new request definition, click **Submit**.
- To save the changes to an existing request definition, click **Update**.

5. Store the data from a request parameter into the Remote Request Data [sn_ind_rmt_help_request_data] table by mapping the request parameter to a column in the request data table.

- a. In the Request configuration mappings section, modify an existing configuration mapping or create another configuration mapping.
 - To modify an existing configuration mapping, click the preview icon (ⓘ) next to a request parameter in the **Request parameter** column of the Request configuration mappings section and then click **Open Record**.
 - To create another configuration mapping, click **New** in the Request configuration mappings section.
- b. On the form, fill in the fields.

Request configuration mapping form

| Field | Description |
|---------------------|--|
| Request parameter | Request parameter received from the EMR system. |
| Request data column | Column name in the Remote Request Data [sn_ind_rmt_help_request_data] table or its extension in the ServiceNow instance. |

Note: You map one request parameter to a unique column in the data table. However, when similar parameters from different EMR systems are available, you can map them to the same column in the data table.

c. Save the configuration mapping.

- If you created a new configuration mapping, click **Submit**.
- If you modified an existing configuration mapping, click **Update**.

Configure request parameters for EMR systems

Define parameters to include EMR variables from an EMR system in a ServiceNow service request.

Before you begin

Role required: sn_ind_rmt_help.admin or admin

About this task

Parameters are EMR variables defined in an EMR system that enrich a service request.

You can also create system-specific parameters as remote request parameters to send data as EMR variables that are automatically populated on the help form of a request. For example, you can use a system-specific parameter to store the workstation or environment setting for a user.

Note the following default request parameter settings:

- For a Cerner EMR system, the remote request parameters are predefined and can't be deleted. Scripted REST APIs are used for integration with a Cerner EMR system system. The predefined Cerner EMR system variables are defined in the Remote Request Parameter [sn_ind_rmt_help_request_param] table. To view the Cerner EMR system parameters, select **Cerner** as the source system on the [Remote Request Parameter form](#).
- For an Epic EMR system, sample EMR variables are available as request parameters with the demo data of the EMR Help application. You can delete or repurpose these request parameters, add any additional parameters, or both. To view the Epic EMR system parameters, select **Epic** as the source system on the [Remote Request Parameter form](#).

Procedure

1. Navigate to **All > EMR Help > Administration > Request Parameters**.
2. In the Remote Request Parameters list, modify an existing parameter or create another parameter.
 - To modify an existing request parameter, select the parameter in the **ID** column of the Remote Request Parameters list.
 - To create another request parameter, click **New** in the Remote Request Parameters list.
3. On the form, fill in the fields.

Remote Request Parameter form

| Field | Description |
|-------|--|
| ID | Unique identifier for the parameter made available to an EMR system. |

| Field | Description |
|----------------|--|
| | i Note: You can't modify an ID after the request definition is created. |
| Name | Name to identify the request parameter. |
| Active | Option for activating the request parameter. |
| Source system | <p>EMR system to which the parameter is mapped.</p> <p>The source system types with which the parameter can be associated are:</p> <ul style="list-style-type: none"> ◦ Epic: Epic EMR system. ◦ Cerner: Cerner EMR system. ◦ Any system: Any type of EMR system, including an Epic EMR system or a Cerner EMR system. <p>i Note: To add more source system entries, you can modify the dictionary entry of the Source system column of the Remote Request Parameter [sn_ind_rmt_help_request_param] table. For more information, see Modify dictionary entries.</p> |
| Sensitive data | Option to indicate that the parameter contains sensitive data. |

4. Save the remote request parameter settings.

- To save a new parameter, click **Submit**.
- To save the changes to an existing parameter, click **Update**.

5. If you have created a new request parameter, add an equivalent column in the Remote Request Data [sn_ind_rmt_help_request_data] table or its extended child data table.

i Note: If a column for an EMR variable already exists in the data table, you can reuse the same column instead of creating another column. For example, if you have multiple EMR systems with a few common EMR variables, you can map the common variable from different EMR systems to the same column in the data table.

Assign roles for EMR Help users

Assign roles to control access to features, capabilities, and data in the EMR Help application.

Before you begin

Role required: admin

About this task

Users with the roles listed in the following table can use the EMR Help application.

Roles required for EMR Help

| Roles | Tasks |
|---------------------------|---|
| sn_ind_rmt_help.admin | Set up remote request definitions and data tables, identify scripted REST APIs for use, and configure a record producer. |
| sn_ind_rmt_help.requester | Submit and monitor a ServiceNow service request from within an EMR system. |
| sn_ind_rmt_help.viewer | <p>View details of the EMR data associated with a ServiceNow service request.</p> <p>Note: Assign the sn_ind_rmt_help.viewer role to agents who will work on issues reported from the EMR system. By default, this role provides access to the EMR variables stored in EMR Request Data [sn_ind_rmt_help_incident_data] table.</p> |

Procedure

Assign roles to users and groups using the Now Platform user administration feature.

- To assign a role to a user, see [Assign a role to a user](#).
- To assign a role to a group, see [Assign a role to a group](#).

Configure healthcare case types for EMR Help

Configure healthcare case types for EMR Help in order to fulfill service requests made from the EMR Help portal.

The base healthcare case type [sn_hcls_case] is an abstract case type which provides a foundation to extend from when building your own healthcare case types.

EMR Help provides a default record producer and request definition built on this base case type as an example of how you might configure your own.

You must configure your own healthcare case type to fulfill records created against the abstract case type. For more information on the abstract Healthcare case type, see [Healthcare case table](#).

The following steps will walk you through creating a new case type and modifying the default record producer and request definition to support it.

Configuration requirements

- A ServiceNow administrator
- EMR Help
- Healthcare and Life Sciences Service Management Core

Create a custom healthcare case type

Create a custom healthcare case type for EMR Help.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > System Definition > Tables**.
2. Click **New**.
3. Fill in the following fields:
 - Label: The label for your healthcare case type. For example, EMR Case
 - Name: The table name for your healthcare case type. For example, sn_hcls_emr_case
 - Extends table: Healthcare case
4. In the Controls tab, set Auto-number to **true**.
5. In the Application Access tab, fill in the fields as follows:
 - Can read: True
 - Can create: True
 - Can update: True
 - Can delete: True
 - Allow configuration: True
6. Click **Save**.

Result

You now have a new case type extended from the abstract case type Healthcare case. For more information on the abstract Healthcare case type, see [Healthcare case table](#).

What to do next

[Configure the record producer for your healthcare case type](#).

Configure the record producer for your healthcare case type

Update the Healthcare Case record producer to point to your newly created table.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Service Catalog > Catalog Definitions > Record Producers**.
2. Open the **Healthcare Case** record producer.
3. Set the table name to your new healthcare case type.
For example, **EMR Case**.
4. Click **Save**.

Result

You have configured the record producer to point to your newly created table.

What to do next

[Configure the request definition for your healthcare case type](#).

Configure the request definition for your healthcare case type

Configure the HCLS Case request definition to support the newly created healthcare case type.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > EMR Help > Administration > Request Definitions**.
2. Open the **HCLS Case [sn_hcls_case_request]** definition.
3. Set the Task type field to your new healthcare case type.
For example, **EMR Case**.
4. Click **Save**.

Result

You have configured the HCLS Case request definition to support your healthcare case type.

What to do next

[Configure the healthcare record page to support your custom healthcare case type.](#)

Configure the healthcare record page to support your custom healthcare case type

Configure the healthcare record page in Workspace to include your custom case type in order to display EMR session information.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Now Experience Framework > UI Builder**.
2. In Experiences, open **CSM/FSM Configurable Workspace**.
3. In **Pages and Variants > Record**, click on **Healthcare record page voltron**.
4. Toggle the **Settings** button.
5. In Conditions, under Variant conditions, append an additional OR statement that includes your new healthcare case type name: `^ORtable=<your table name>`

For example:

```
table=sn_hcls_patient^ORtable=sn_hcls_case^ORtable=sn_hcls_emr_case
```

1 Note: To find your healthcare case type table name, navigate to All > System Definition > Tables and search for your new Healthcare Case type. The table name is displayed in the Name column.

6. Click **Save**.

Result

You have now configured Workspace to include your custom healthcare case type.

Configure digest token authentication for EMR Help

Configure ServiceNow single sign-on with Epic utilizing digest token authentication.

The ServiceNow instance receives a username and a digest token within an unencrypted HTTP Header from an Epic Hyperspace FDI Record. ServiceNow reads the HTTP header values and validates the digest token. If the digest token validates successfully, then the instance searches for a matching user credential in the User table. If there is a matching value, the user is logged in. If the digest token does not validate successfully or there is no matching user in the user table the user is redirected to a standard login page and no access is granted.

Digest Token Authentication with Epic Hyperspace/Hyperdrive requires:

- A Generated encryption key unique to the Epic Hyperspace/Hyperdrive implementation
- A script include or javascript library that can decrypt AES256
- A configured Integration Record (FDI) in Hyperspace that will pass the user and digest token to the target instance in the URL parameter
- A ServiceNow administrator
- An Epic Analyst

For instructions on how to do this configuration, see the [How to Configure Digest Token Authentication for EMR Help with Epic Hyperspace and Hyperdrive \[KB1002504\]](#) article in the Now Support Knowledge Base.

Configure iFrame support for EMR Help in ServiceNow

Configure EMR Help to launch within a frame in Epic Hyperspace and Hyperdrive.

Before you begin

Role required: admin

In order for any ServiceNow page or portal to be launched within an iframe, a HTTP Response Header must be configured with the correct content security policy. This content security policy will dictate which third party websites can load a ServiceNow page or portal inside an iframe.

The EMR Help portal (Industry Remote Portal) will need to have a specific HTTP Response Header configured for the url of the Epic Hyperdrive site launching EMR Help in an iframe.

This HTTP Response Header will need to be ordered after any global HTTP Response Headers and the "Add by" must be set to Overwrite.

This configuration will work for both Hyperdrive and Hyperspace. ServiceNow will detect the browser version and automatically change the HTTP Response Header accordingly.

Procedure

1. Set scope to EMR Help.
2. Navigate to **All > HTTP Response Headers**.
(or search for sys_response_header.list)
3. Click on HTTP Response Headers.
4. On the list view, click New.
5. Fill out the HTTP Response Header form as follows.

| Field | Response |
|--------|----------|
| Active | True |

| Field | Response |
|-------------|--|
| Applies to | Specific type |
| Type | Service Portal [sp_portal] |
| Record | Service Portal: Industry Remote Help |
| Name | content-security-policy |
| Value | The requesting Hyperspace/Hyperdrive domain that is loading EMR Help. For example, frame-ancestors 'self' epic.example.com . |
| Description | EMR Help HTTP Response Header for Epic Hyperspace/Hyperdrive support. |

6. Click Submit.
7. In the list view, sort by Order field.
8. Double click in the Order field for the newly created HTTP Response Header and set the value to 500.
9. Double click in the Add by field and set the value to Overwrite.

Result

You should now have an HTTP Response Header as seen below:

The screenshot shows the ServiceNow Now interface with the following details:

- Header Name:** content-security-policy
- Value:** frame-ancestors 'self' https://epic.example.com
- Description:** (Empty)
- Buttons:** Update, Delete

What to do next

For additional configuration steps within Epic, see the [How to configure EMR Help to launch within an iFrame in Epic Hyperspace and Hyperdrive \[KB1207128\]](#) article in the Now Support Knowledge Base.

Configure the EMR session info contextual sidebar

Configure the EMR session info contextual sidebar in Workspace to manage the fields that display there.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > EMR Help > Request Definitions**.
2. Select the request definition for which you want to configure the contextual sidebar.
3. In the Request configuration mappings related list, use the Order column to sort the field order for the contextual sidebar.

The lowest numerical value always displays first on the sidebar. So, for example, if email address has a value of 210 and phone number has a value of 200, you can swap those values to get phone number to display before email address.

If a source system is defined in the request, then only the parameters for that source system will be displayed in the contextual sidebar based on their sort order. If no source system is defined in the request, then all parameters will display on the contextual sidebar.

Configuring the EMR Help service portal

The EMR Help service portal enables users to submit ServiceNow IT service requests from within their EMR system.

As an administrator, you can set up the EMR Help service portal for submitting IT service requests from an EMR system. To access the EMR Help service portal, navigate to **Service Portal > Portals** and click **Industry Remote Help**.

The default home page available within the EMR Help service portal provides the **New > Report an Issue** menu option for submitting a Remote Assist Incident from an EMR system. For IT service requests other than incidents, such as for demands or change requests, you must configure the EMR Help service portal to add a new menu for definitions associated with the IT service request. Clinicians can then view the option for submitting the configured IT service request type on their service portals.

For more information about creating a custom interface using service portals, see [Service Portal](#).

Setting up the ServiceNow IT service request fulfillment process for EMR systems

Manage ServiceNow IT service requests from your EMR system by using either a system support module or a dedicated service portal.

Using a system support module for your EMR system

Use the pre-built ServiceNow scripted REST APIs for submitting IT service requests within your EMR system, such as the Cerner EMR system. The *Remote help request* API is available for integrations with your EMR system. For more information, see [Remote help request API](#).

Using a dedicated service portal for your EMR system

Embed the service portal page for submitting ServiceNow IT service requests within your EMR system, such as the Epic EMR system.

i Note: For integrating external web applications into an Epic EMR system, refer to the following sections in the Setup and Support guide available on the Epic website for its users:

- Allow users to Launch the Web Application from a Toolbar Button
- Configure the Integration Record for HTTP GET
- Prepare Activity and Run Parameters for Your Workflow

To learn more, contact the Epic team representative of your institution.

As an administrator, you can use the EMR Help service portal for enabling clinicians to submit IT service requests. For more information, see [Configuring the EMR Help service portal](#).

To use a dedicated service portal, you can create a record producer to define the fields for the help form in the record producer and then embed the form in your service portal. Clinicians can use this help form to submit IT service requests.

By default, the *EMR Incident* record producer is available for submitting IT service requests associated with incidents. You can use the default record producer to add more variables or create your own record producer. For more information, see [Record Producer](#) ↗.

When embedding the form in your service portal, note the following points:

- Use the following URL format to embed the service portal page for submitting IT service requests: `https://<instance name>.service-now.com/emr-assist?id=emr_assist_home_page&sysparm_source=source_name` .

For `source_name`, provide the parameter defined in the request parameter. For more information, see [Configure request parameters for EMR systems](#).

- You can also append any EMR variables to the service portal page URL by using the following format: `https://<instance name>.service-now.com/emr-assist?id=emr_assist_home_page&sysparm_source=source_name&var1_id=Value1&var2_id=Value2` .

For example, `https://<instance name>.service-now.com/emr-assist?id=emr_assist_home_page&sysparm_source=epic&sysparm_ws=Workstation&sysparm_ws=Environment`.

i Note: EMR variables include workstation ID, server, patient medical record number (MRN), and others. You define the EMR variables as task parameters. The EMR variable values are automatically populated, if configured to be displayed on the EMR system help form. For more information, see [Configure request parameters for EMR systems](#).

Encryption options in EMR Help

EMR Help provides encryption support to secure sensitive information.

Encryption prevents unauthorized users from viewing sensitive EMR system data.

The following encryption options on the Now Platform are supported in the EMR Help application:

- [Column Level Encryption](#)
- [Column Level Encryption Enterprise](#)

Column Level Encryption

Column Level Encryption (CLE), is a built-in feature which permits encryption in encryption modules. The CLE plugin (com.glide.encryption) that enables the encryption of table columns and attachments associated with an EMR system in a service request is activated by default when your administrator installs the EMR Help application.

Once the CLE plugin (com.glide.encryption) is activated, set up an encryption module and associate it with the required roles that use the EMR Help application. You can encrypt tables or fields (columns within a table) but encryption is most useful for columns in the data table for request parameters that are marked as sensitive data.

By default, the **rmt_help_data_view** encryption module associated with the **sn_ind_rmt_help_viewer** role is available for use with the EMR Help application.

In addition, the **Additional Info** field (column) in the Remote Request Data [sn_ind_rmt_help_request_data] table and **Phone number** and **Email address** fields (columns) in the EMR Incident Data [sn_ind_rmt_help_incident_data] table are encrypted by default.

To learn more, see [Column Level Encryption](#).

Column Level Encryption Enterprise

Column Level Encryption Enterprise provides an enhanced encryption capability and utilizes the Key Management Framework (KMF). For using the Column Level Encryption Enterprise option with the EMR Help application, your administrator must activate the plugin (com.glide.now.platform.encryption). As an administrator, you can choose to opt in to use CLE with KMF. For more information, see [Activate Column Level Encryption Enterprise](#).

Beginning with the Quebec release, the migration of keys and encrypted data from Encryption Support to Column Level Encryption is automated using scheduled jobs. For more information, see [Migrating to Column Level Encryption Enterprise](#).

Note: Existing customers on the Paris release must contact ServiceNow Customer Support to migrate keys and encrypted data from Encryption Support to Column Level Encryption Enterprise.

Customize the URL and REST API task parameters for EMR systems

Use scripted extension points to manipulate URL parameters and REST API task parameters for an EMR system.

Before you begin

Install the EMR Help application. For more information, see [Install EMR Help](#).

Role required: admin

About this task

By using extension points, you can easily integrate customizations without having to alter the base code. You can extend standard base functionality using customized scripts. For more information, see [Using extension points to extend application functionality](#).

Procedure

1. Navigate to All > System Extension Points > Scripted Extension Points.
2. In the **API Name** column, search for and select **sn_ind_rmt_help.RemoteHelpParamTransformer**.

3. On the Extension Point form, either modify a script include to use the `sn_ind_rmt_help.RemoteHelpParamTransformer` extension point or create and register a custom script include.
 - Create and register a custom script include.

For more information, see [Registering custom script includes against the scripted extension points](#).

- Modify the existing script include by going to the Implementations related list and selecting a script include in the **Class** column.

i Note: By default, the `RemoteHelpParamTransformer` script include that use the `sn_ind_rmt_help.RemoteHelpParamTransformer` extension point is available for the EMR Help application.

4. Customize parameters for an EMR system by adding the `sn_ind_rmt_help.RemoteHelpParamTransformer` extension point to the script include. You can create multiple implementations for an extension point and provide an order number for each implementation. The implementation that has the lowest order number is executed first.

EMR system customizations

| Customization | Implementation |
|--------------------------|--|
| Incoming task parameters | Include the <code>transformIncomingTaskParams</code> method in the <code>sn_ind_rmt_help.RemoteHelpParamTransformer</code> extension point. The method is called from the REST APIs prior to creating and updating IT service requests from an EMR system and enables you to modify any input parameters. |
| Outgoing task parameters | Include the <code>transformOutgoingTaskParams</code> method in the <code>sn_ind_rmt_help.RemoteHelpParamTransformer</code> extension point. The method is called from the REST APIs for getting a task list and task details before sending the task-related data to the EMR system. |
| Incoming URL parameters | Include the <code>transformURLParams</code> method in the <code>sn_ind_rmt_help.RemoteHelpParamTransformer</code> extension point. This method is called from a service portal before storing the URL parameters. <p>i Note: If your EMR system has an encryption algorithm, you can configure the <code>Incoming URL parameters</code> method in the <code>sn_ind_rmt_help.RemoteHelpParamTransformer</code> extension point to decrypt any encrypted task parameters from your ServiceNow instance.</p> |

5. On the Extension Point form, click **Update**.

Creating requests within your EMR

You can request service directly within the EMR system which automatically creates a service request in a ServiceNow instance

From the EMR Help portal, create service requests directly from within your EMR by using the Help menu at the upper right-hand corner of the screen.

Submitting ServiceNow IT service requests from EMR systems

Report any issues with your EMR system by submitting ServiceNow IT service requests.

As a user with the sn_ind_rmt_help.requester role, you can submit and monitor a ServiceNow IT service request from within your EMR system. An administrator specifies the service fulfillment method of an IT service request. For more information, see [Setting up the ServiceNow IT service request fulfillment process for EMR systems](#).

Creating healthcare cases from within your EMR

Use the EMR Help service portal to create healthcare cases from directly within your EMR system.

As a user with the sn_ind_rmt_help.requester role, you can submit healthcare cases from within your EMR system. These cases can then be fulfilled within a ServiceNow instance.

i Note: The healthcare case request capability can only be fulfilled for custom healthcare case types. In order to fulfill healthcare cases, you must first create your own custom healthcare case type. For more information on this, see [Configure healthcare case types for EMR Help](#).

Creating a healthcare case

To create a case from within your EMR, select Healthcare Case from the Requests option menu in the upper right. The Healthcare Case form will then appear.

Help is on its way!

Home > Healthcare Case

Healthcare Case

EMR Session Information

| | | | |
|-------------------|---------|---------------------------|-------------|
| Patient ID | MR12345 | Citrix Client Name | Test Client |
|-------------------|---------|---------------------------|-------------|

Healthcare organization

Solana Health - Colorado

Healthcare Practitioner

Amy Yang | NP781652 | amy.yang@example.com

I need help with

EMR Services

Is this related to a patient record?

Patient

Gilly Parker | MR12345 | gilly.parker402@example.com

Description

|

Protected health information (PHI)

Enter details such as patient name, medical records number (MRN), and date of birth (DOB).

Add attachments

Submit

Healthcare Case fields

| Field | Description |
|-------------------------|--|
| EMR session information | <p>EMR session information will displays the values for any configured parameters that have been captured from EMR.</p> <p>If you have a parameter configured to display here but it does not generate, it is because there no value passed from the EMR for that parameter.</p> |

Healthcare Case fields (continued)

| Field | Description |
|--------------------------------------|---|
| | These fields populate automatically and are read only. |
| Healthcare organization | The healthcare organization associated with this healthcare case. This field populates automatically based on user's associated organization. |
| Healthcare practitioner | The healthcare practitioner associated with this healthcare case. This field populates automatically based on the practitioner making the request. |
| I need help with | The reason for your request. Select the type of healthcare service you need help with from the drop-down list. |
| Is this related to a patient record? | Select to indicate this request is associated with a patient record. If yes, the patient field becomes visible and available to populate. |
| Patient | The patient associated with this healthcare case. This field populates automatically if the patient_id parameter is passed from the EMR. |
| Description | Description of your issue. |
| Protected health information (PHI) | Enter details such as patient name, medical record number (MRN), and date of birth (DOB). The value entered into this field is encrypted. |

Click submit to route your healthcare case request to fulfilment.

Submitted Healthcare case information

After submitting your Healthcare case, you can review the information you submitted directly from the portal.

Help is on its way! Requests

Home > My Request - CS0001016

Created just now Updated just now State New

CS0001016

Show more ▾

Opened by System Administrator... Service EMR Services Patient Gilly Parker

Activity Attachments Additional info

System Administrator CS0001016 Created just now

Start

- The Activity tab displays the status of the request.
- The Attachments tab displays any attachments associated with the request.
- The Additional info tab displays a read only version of all information submitted on the request.

Help is on its way! Requests

Home > My Request - CS0001016

Created just now Updated just now State New

CS0001016

Show more ▾

Opened by System Administrator... Service EMR Services Patient Gilly Parker

Activity Attachments Additional info

EMR Session Information
Millennium username 1234 Server Test Client

Healthcare organization

Healthcare Practitioner

I need help with
EMR Services

Is this related to a patient record?

Patient
Gilly Parker

Description
Description of your issue.

Protected health information (PHI)

Virtual Agent in EMR Help

Virtual Agent, ServiceNow's conversational bot platform, is available when creating requests from the EMR Help portal.

Virtual agent can be used to quickly obtain information, make decisions, and perform common work tasks.

To interact with Virtual Agent, simply click the chat window icon on the bottom right-hand corner of the screen.

Help is on its way!



My Open Requests

[CS0001016](#)

* 4 - Low * New

[CS0001013](#)

* 4 - Low * New

Now Support ...

can help you today.

What's your issue or request? Or take a look at what I can help with.

[Check case status](#)

Enter a case number

CS0001013

CS0001013
State New

Thank you for using our support chat.

For more information on Virtual Agent, see [Virtual Agent](#).

Resolving EMR Help requests

You can use a ServiceNow instance to resolve requests generated in the EMR Help service portal.

Work on task records that are automatically created when clinicians submit ServiceNow service requests from an EMR system.

As a fulfills, for example, if you are an IT agent, you can access the task record for an IT service request on the ServiceNow instance linked with the EMR system. Incidents are the task type configured by default with the EMR Help application.

- Note:** The EMR Request Data related list of an incident form includes any EMR system-specific data. The data in the EMR Request Data related list is viewable only if you have the sn_ind_rmt_help.viewer role in addition to the itil role. If you do not have the required roles, this related list appears empty.

In order to fulfill healthcare cases, you must first create your own custom healthcare case type. For more information on this, see [Configure healthcare case types for EMR Help](#).

Use Workspace to view requests submitted from an EMR system.

Viewing and resolving ServiceNow IT service requests submitted from EMR systems

Work on task records that are automatically created when clinicians submit ServiceNow IT service requests from an EMR system.

Ensure that an administrator has added the EMR Incident Data related list to the Incident form. For more information, see [Configuring the form layout](#).

Incidents are the task type configured by default with the EMR Help application.

You can use the EMR Help module or the Incident module to access incidents submitted from an EMR system.

- To use the incident module, see [View and resolve an EMR incident from the Incident module](#).
- To use the EMR Help module, see [View and resolve an EMR incident from the EMR Help module](#).

View and resolve an EMR incident from the Incident module

Work on ServiceNow IT service requests submitted by clinicians using the Incident module.

Before you begin

Role required: itil and sn_ind_rmt_help.viewer

Procedure

1. Navigate to **All > Incident > Open**.
2. On the Incidents list, search for the EMR incident that you want to work on.
3. In the **Number** column, click the link to the EMR Incident.
4. In the EMR Incident Data related list of the incident form, view the information from the EMR system.

Note: Your administrator might need to configure the form to add the EMR Incident Data related list. You can view data in this related list only when you have the sn_ind_rmt_help.viewer role in addition to the itil role. If you do not have the required roles, the EMR Incident Data related list appears empty.

5. Resolve and close the incident.

a. Select the **Resolution Information** tab.

b. On the form, fill in the fields.

Resolution Information fields

| Field | Description |
|------------------|---|
| Knowledge | Option for generating a knowledge article with the information from the incident. |
| Resolved by | User who resolved the issue and the date and time the incident was closed. |
| Resolved | Date and time when the incident was resolved. |
| Resolution code | Information to categorize resolved cases. |
| Resolution notes | Notes on how an incident was resolved. |

c. Click **Resolve**.

d. Optional: Close the incident by clicking **Close Incident**.

View and resolve an EMR incident from the EMR Help module

Work on ServiceNow IT service requests submitted by clinicians using the EMR Help module.

Before you begin

Role required: itil and sn_ind_rmt_help.viewer

Procedure

1. Navigate to **All > EMR Help > EMR Incidents > My Open**.
2. On the EMR Incidents list, search for the EMR incident that you want to work on.
3. In the **Number** column, click the link to the EMR Incident.
4. In the EMR Incident Data related list of the incident form, view the information from the EMR system.

i Note: Your administrator might need to configure the form to add the EMR Incident Data related list. You can view data in this related list only when you have the sn_ind_rmt_help.viewer role in addition to the itil role. Else, the EMR Incident Data related list appears empty.

5. Resolve and close the incident.

- a. Select the Resolution Information tab.
- b. On the form, fill in the fields.

Resolution Information fields

| Field | Description |
|------------------|---|
| Knowledge | Option for generating a knowledge article with the information from the incident. |
| Resolved by | User who resolved the issue and the date and time the incident was closed. |
| Resolved | Date and time when the incident was resolved. |
| Resolution code | Information to categorize resolved cases. |
| Resolution notes | Notes on how an incident was resolved. |

- c. Click **Resolve**.
- d. Optional: Close the incident by clicking **Close Incident**.

Viewing and resolving healthcare cases submitted from EMR systems

Use Workspace in a ServiceNow instance to work on healthcare cases created from an EMR system.

View and resolve an EMR healthcare case from Workspace

Use Workspace to fulfill healthcare cases generated from EMR Help.

In order to fulfill healthcare cases, you must first create your own custom healthcare case type. For more information on this, see [Configure healthcare case types for EMR Help](#).

Information from the EMR request is captured in the EMR session overview contextual side panel.

EMR Help reference

Reference topics provide additional information about EMR Help features.

Components installed with EMR Help

Several types of components are installed with activation of the EMR Help application including tables, user roles, and plugins.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see [Find components installed with an application](#).

Demo data is available for this feature.

Roles installed

Roles installed in EMR Help

| Role | Description | Contains roles |
|---------------------------|--|---------------------------|
| sn_ind_rmt_help.admin | Set up remote request definitions and data tables, identify scripted REST APIs for use, and configure a record producer. | sn_ind_rmt_help.requester |
| sn_ind_rmt_help.requester | Submit and monitor a ServiceNow service request from within an EMR system. | sn_ind_rmt_help.viewer |

Roles installed in EMR Help (continued)

| Role | Description | Contains roles |
|------------------------|---|----------------|
| sn_ind_rmt_help.viewer | <p>View details of the EMR data associated with a ServiceNow service request.</p> <p>Note: Assign the sn_ind_rmt_help.viewer role to agents who will work on issues reported from the EMR system. By default, this role provides access to the EMR variables stored in EMR Request Data [sn_ind_rmt_help_incident_data] table.</p> | None |

Tables installed

Tables installed in EMR Help

| Table | Description |
|--|---|
| Remote Request Parameter [sn_ind_rmt_help_request_param] | Contains parameters for IT service requests available to the EMR system from your ServiceNow instance. |
| Remote Request Data [sn_ind_rmt_help_request_data] | <p>Provides basic fields for IT service requests. You can extend this table to include more data from an IT service request.</p> <p>Each remote request parameter has a corresponding column in this table.</p> |
| Remote Request Definition [sn_ind_rmt_help_request_defn] | Associates a task type with a request data table and also includes the request configuration mapping. |
| EMR Incident Data [sn_ind_rmt_help_incident_data] | Contains data from the EMR system included in IT service requests. This table extends the Remote Request Data [sn_ind_rmt_help_request_data] table for including any task-specific data from IT service requests. |
| Request configuration mapping [sn_ind_rmt_help_defn_param_data_map] | Maps request parameters with the columns in the Remote Request Data [sn_ind_rmt_help_request_data] data table or its child table. |

Plugins installed

Plugins installed in EMR Help

| Plugin | Description |
|---|--|
| Encryption Support plugin (com.glide.encryption) | Encrypts table columns and attachments associated with an EMR system in an IT service request. |

ServiceNow Store applications installed

ServiceNow Store applications installed in EMR Help

| Application | Description |
|-------------------------------|--|
| Industry Core (com.sn_ind) | Includes common objects, code artifacts, and request definitions for industry vertical applications. |

EMR Help data model tables

Tables installed with the EMR Help application enable you to submit requests on your ServiceNow instance from an EMR System.

To learn more about the EMR Help data model, see [EMR Help data model](#)

Remote request definition table

The Remote Request Definition [sn_ind_rmt_help_request_defn] table stores the record producer and task type.

Remote Request Definition table

The Remote Request Definition [sn_ind_rmt_help_request_defn] table has the following features:

- Extends the Application File [sys_metadata] table that uses the update_synch dictionary attribute to enable customizations. For more information, see [Customizations tracked by update sets](#).
- Models a request parameter originating from an EMR system.

Role required to configure the table: sn_ind_rmt_help.admin.

Remote request definition form fields

| Field | Data type | Description |
|-----------------|-----------|--|
| Record Producer | Reference | <p>Represents the record producer associated with the remote request definition.</p> <p>For more information, see Create a record producer</p> |

Remote request definition form fields (continued)

| Field | Data type | Description |
|--------------------------|------------|--|
| Request data table | Table name | The table that stores the values of the EMR session information that was captured when creating the task by the record producer. |
| Rest API Task Parameters | Field list | <p>Provides the ability to choose fields that you want to make available to the listed API actions. The fields chosen will be available to the rest API operations for following associated request definition:</p> <ul style="list-style-type: none"> 1. Task create 2. Task list 3. Task detail 4. Task update |

Remote request parameter table

The Remote Request Parameter [sn_ind_rmt_help_request_param] table stores all parameters that can be used across all remote request definitions.

Remote Request Parameter table

The Remote Request Parameter [sn_ind_rmt_help_request_param] table has the following features:

- Extends the Application File [sys_metadata] table that uses the update_synch dictionary attribute to enable customizations. For more information, see [Customizations tracked by update sets](#).
- Models a request parameter originating from an EMR system.

Role required to configure the table: sn_ind_rmt_help.admin.

Remote request parameter form fields

| Field | Data type | Description |
|--------|------------|--|
| Active | True/False | Sets the parameter as active to be used in a request definition. |
| Domain | Domain ID | The domain associated with this record. |

Remote request parameter form fields (continued)

| Field | Data type | Description |
|----------------|------------|---|
| ID | String | Unique identifier for this parameter that is utilized in a request definition. |
| Name | String | Name of this remote request parameter. |
| Sensitive Data | True/False | Used to classify whether the information received by this parameter is sensitive or not. i Note: Fields marked as true should only be mapped to data columns that have column level encryption enabled. To learn more about column level encryption, see: Column Level Encryption |
| Source system | String | Represents the EMR system this parameter supports. In order to support all EMR systems, set this field to any . |

Remote request data table

The Remote Request Data [sn_ind_rmt_help_request_data] table stores all of the captured parameter data associated to a task record.

The Remote Request Data [sn_ind_rmt_help_request_data] table has the following features:

- Stores additional data from an EMR system.
- Extensible and used for creating data tables based on a task type.

Role required to configure the table: sn_ind_rmt_help.admin.

i Note: Storing data from the EMR system in the Remote Request Data [sn_ind_rmt_help_request_data] table or its extended child data table provides a layer of security. As an administrator, you can extend the Remote Request Data [sn_ind_rmt_help_request_data] table for a particular task type to store additional information from an EMR system. For example, the EMR Help application provides the EMR Request Data [sn_ind_rmt_help_incident_data] table that extends the Remote Request Data [sn_ind_rmt_help_request_data] table and associates incidents with service requests.

Remote request data form fields

| Field | Data type | Description |
|--------------------|---------------|---|
| Additional info | String | <p>This field is used to store any additional sensitive information when submitting a request from the EMR.</p> <p>This field has column-level encryption.</p> |
| Created | Date/Time | Date and time stamp this record was created. |
| Created by | String | The name of the user who created this record. |
| Domain | Domain ID | The domain associated with this record. |
| Patient ID | String | Represents the unique patient identifier (ie MRN) for this patient in the EMR system. |
| Request Definition | Reference | References the remote request definition. |
| Source system | String | <p>Represents the EMR system that this request came from. IE, Epic/Cerner.</p> <p>i Note: If this value is unknown, it means that no source system was provided when the record was created.</p> |
| Sys ID | Sys ID (GUID) | Unique sys ID every table has. |
| Tags | Related Tags | Tags related to this record. |
| Task | Reference | References the associated task. |
| Task type | Table name | The task type that is configured on the remote |

Remote request data form fields (continued)

| Field | Data type | Description |
|------------|-----------|---|
| | | request definition that was used to generate this record. |
| Updated | Date/Time | Stamp of date and time last updated. |
| Updated by | String | Name of person to last update record. |
| Updates | Integer | Number of updates that have occurred. |

EMR Request Data table

The EMR Request Data [sn_ind_rmt_help_incident_data] table stores all of the captured parameter data associated to a task record.

The EMR Request Data [sn_ind_rmt_help_incident_data] table has the following features:

- Extends the Remote Request Data [sn_ind_rmt_help_incident_data] table.
- Models request-specific EMR data.
- Corresponds to request parameters.
- Includes the capability to add more columns for any additional parameters.

Role required to configure the table: sn_ind_rmt_help.admin.

Remote request data form fields

| Field | Data type |
|----------------------|-----------|
| Email address | String |
| Environment | String |
| Is user a physician? | String |
| Issue type | String |
| Millennium user name | String |
| Phone extension | String |
| Position | String |

Remote request data form fields (continued)

| Field | Data type |
|----------------------|-----------|
| Server | String |
| Session recording ID | String |
| Workstation | String |

Request configuration mapping table

The Request configuration mapping [sn_ind_rmt_help_defn_param_data_map] table stores the association between the request parameter and the request definition.

The Request configuration mapping [sn_ind_rmt_help_defn_param_data_map] table has the following features:

- Extends the Application File [sys_metadata] table that uses the update_synch dictionary attribute to enable customizations. For more information, see [Customizations tracked by update sets ↗](#).
- For a request definition, maps each active request parameter to a specific column in the corresponding request data table.

Role required to configure the table: sn_ind_rmt_help.admin.

Request configuration mapping form fields

| Field | Data type | Description |
|---------------------|------------|--|
| Domain | Domain ID | The domain associated with this record. |
| Internal ID | String | The internal ID associated with this record. |
| Order | Integer | The order that your parameters will display in the contextual sidebar. |
| Request data column | Field Name | The field on the task type table defined in the request definition. |
| Request definition | Reference | References the remote request definition. |
| Request parameter | Reference | References the remote request parameter. |

Domain separation and EMR Help

Domain separation is supported for EMR Help. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see [Application support for domain separation](#).

Overview

The EMR Help application includes domain separation for configuration tables (request definition, request parameters, and definition to parameter mapping) as well as domain separation for transactional data like tasks and associated request data coming in from the EMR system.

Domain separation is enabled in the following aspects of the EMR Help application:

- Data stored in the Remote Request Data [sn_ind_rmt_help_request_data] table is domain separated.
- Tasks created when raised either from a record producer or using a REST API are domain separated.
- Request parameters can be created for use in different domains.
- Request definitions can be created for use in different domains.
- Request definition mappings can be created for use in different domains.

How domain separation works in EMR Help

For customers using an EMR Help service portal within their EMR systems to raise ServiceNow IT service requests, the domain is set from the logged-in user's session, in the task created, and the associated request data.

For customers using the *Remote help request* API, an administrator can domain separate a task and the associated remote request data by sending any of the following parameters in the *task_parameters* object while creating the request.

- Task for user (task_for)

Note: Valid for all task types.

- Caller (caller_id)

Note: Valid only for the Incident [incident] table.

For incident, the task's domain is set from the `caller_id` parameter if specified in the request body. When the `caller_id` parameter is not specified, the task's domain is set as the domain of the user specified in the `task_for` parameter. If neither of these parameters are specified in the request body, the task's domain is set from the domain of the authenticated user invoking the `Remote help request` API.

Configuring domain separation for EMR Help

The transactional data such as the task created and the associated remote request data are automatically domain separated.

Any integration with the Cerner EMR system will work with the IT Service Request [sn_it_request] request definition only mapped to the Cerner EMR system by default. In this case, only tasks and remote request data can be domain separated.

Domain separated tables

- Remote Request Definition (`sn_ind_rmt_help_request_defn`)
- Remote Request Parameter (`sn_ind_rmt_help_request_param`)
- Request configuration mapping (`sn_ind_rmt_help_defn_param_data_map`)
- Remote Request Data (`sn_ind_rmt_help_request_data`) and its extended child data tables
- Task [task]

Related topics

[Domain separation for service providers](#)

Patient Support Services

With the ServiceNow® Patient Support Services application, streamline the patient onboarding, education, and engagement for various patient support services such as discount plans, adherence programs, opioid, and diabetes management.

Request apps on the Store

Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#).

Explore



Learn about how healthcare organizations use Patient Support Services.

Configure



Plan and configure your implementation.

Manage



Manage enrollment requests from the Workspace.

| | | |
|---|--|--|
| <p>Complete</p>  <p>Complete your to-do items for enrollment requests.</p> | <p>Training request appointments</p>  <p>Book appointments for enrollment training requests.</p> | <p>Contribute</p>  <p>Create enrollment cases as a contributor.</p> |
| <p>Reference</p>  <p>Get details about components including tables and properties.</p> | <p>Analytics and reporting</p>  <p>Coordinate work and improve processes with dashboards and reports.</p> | |

Exploring Patient Support Services

Whether you're starting or expanding your implementation of the Patient Support Services application, consider learning more about features available to streamline the onboarding, education, and engagement processes for your patients.

Overview

For patients, make onboarding easy for any therapy and promote adherence for better health outcomes.

For healthcare organizations, overcome the hurdles faced by patients when starting a therapy by removing financial barriers to improve access and streamlining onboarding to get patients started on the therapy faster.

For care coordinators, the Patient Support Services playbook provides a guided experience to review enrollment requests. They can verify the patient information, review enrollment details, identify and assign the required consent tasks and forms, and send the appropriate documentation to the patient's insurance organization for pre-authorization.

The Patient Support Services application uses the data model provided by the Healthcare and Life Sciences Service Management Core application. The enrollment requests are submitted as enrollment cases and assigned to patient service agents acting as care coordinators who can then use a guided playbook within their Workspace for fulfilling tasks within the patient support program and closing an enrollment case.

Benefits

Patient Support Services provides the following benefits:

Patient Support Services benefits

| Benefit | Key feature | Role |
|--|---|------------------|
| Manage enrollment requests and complete to-do items, such as training tasks. | Managing enrollment requests in Workspace | Care Coordinator |
| Book appointments for support programs and complete to-do items assigned to you as a patient. | Completing to-do items for Patient Support Services | Patient |
| Book appointments for enrollment training requests. | Booking appointments for Patient Support Services | Care Coordinator |
| View analytics and data visualizations that help you improve your business processes and quantify the value of self-service. | Patient Support Services dashboard | HCLS Manager |

To get started with the Patient Support Services application, see [Configuring Patient Support Services](#).

Patient Support Services - Workflow scenario

Use the Patient Support Services application for streamlining enrollment activities for a patient support service including patient onboarding and pre-authorization.

Scenario: A doctor prescribes some medicines and injections to treat a disease diagnosed in a patient. The patient is concerned about the cost because of a high co-pay medical insurance plan and is worried about taking injections by oneself. The doctor tells the patient about the savings card and patient support program offered by a pharma company. The doctor then helps the patient to submit the enrollment application. In the enrollment application form, the patient enters all personal and insurance details and requests support for the savings card, sharps disposal service, and injection training. The patient signs the Health Insurance Portability and Accountability Act (HIPAA) consent and submits the enrollment application form. When an enrollment case is created in the ServiceNow instance, the Patient Support Services workflow initiates a playbook configured for enrollment cases. The case gets assigned to John who is a care coordinator.

The following graphic shows how the Patient Support Services application is used for managing the patient support program as discussed in the scenario.

Using the Patient Support Services application for managing a patient support service request

Patient Support Services

A workflow to streamline patient onboarding, education, and engagement for various patient support services.



Playbook enables care coordinators with the steps they are responsible for, as well as full visibility into the end-to-end process life cycle.



The care coordinator views and validates patient information, including enrollment eligibility and medication prescriptions.



After reviewing the application and verifying the prescription and eligibility criteria, the patient is enrolled into the patient support program.



The Patient Support Services workflow triggers fulfillment tasks, such as sending out a savings card or scheduling an appointment for injection training.

The patient's pharmacy is contacted, and drug delivery details are confirmed and shared with the patient.



The following workflow elaborates how various users use the Patient Support Services application to enable the patient to enroll for a patient support program and obtain the savings card from a pharma company:

1. John uses the Workspace to view the enrollment case.
2. In Workspace, John can view complete information about the patient from the **Patient information** tab.

John validates the patient details including insurance on file, contact information, and medical history.

3. John then selects the **Playbook** tab to view all the necessary case-related information.

The layout of a playbook enables care coordinators to focus on the steps they are responsible for, while providing full visibility into the end-to-end process life cycle.

4. John reviews the application, verifies the prescription and consent, and accepts the enrollment application after reviewing that the patient meets the eligibility criteria of the program.
5. The patient is enrolled into the patient support program and a welcome email notification is sent to the patient.
6. Based on the patient's preference, John either works with the insurance company or coordinates with the specialty pharmacy to complete the benefit investigation activities.
7. After the benefit investigation activities are set to complete, the Patient Support Services workflow:
 - Triggers the fulfillment tasks for each service that the patient has enrolled into. In this example, tasks are created for sending a savings card and sharps disposal container.
 - Sends an email notification to the patient to book the appointment for the injection training support.
8. John contacts the pharmacy to place the prescription order through fax or email, confirms the drug delivery date with the pharmacy, and sends a confirmation email to the patient.
9. The Patient books the appointment for the injection training from the patient portal, and then a training task is assigned to the Nurse Training Support assignment group.
10. A nurse educator from the Nurse Training Support assignment group provides the injection training to the patient and completes the training checklist in Workspace.
11. The enrollment case is set to complete when all the enrollment tasks are set to complete in the playbook.

Configuring Patient Support Services

Set up the Patient Support Services application to complete enrollment activities associated with a patient service program.

Note: The Patient Support Services application is based on the Patient Support Services data model that extends the [Healthcare and Life Sciences data model](#) and stores all enrollment requests in the Enrollment case [sn_patientservice_enroll_case] table.

The following table provides an overview of the configuration tasks required for Patient Support Services.

Patient Support Services configuration tasks

| Task | Description |
|---|--|
| Install Patient Support Services. | Install the Patient Support Services application to work on patient support services. |
| Assign roles for Patient Support Services users. | Assign roles to control access to features, capabilities, and data in the Patient Support Services application. |
| Use the Patient Support Services data model. | Use Patient Support Services tables to store the data related to enrollment requests. |
| Approve restricted caller access privileges for Patient Support Services. | Approve restricted caller access (RCA) privileges for accessing document templates from the Patient Support Services application. |
| Configure an enrollment request form. | Configure an enrollment request form to enable patients or practitioners enroll into Patient Support Services programs offered by a healthcare organization. |
| Configure the submission flow of the enrollment request form. | Use scripted extension points to decide what records are created or updated after an enrollment request form is submitted. |
| Determine who can conduct training tasks. | Add users who can conduct the trainings for Patient Support Services to the Nurse Training Support assignment group. |
| Configure an appointment booking setting. | Enable patients to book an appointment for the training tasks conducted within the Patient Support Services application |
| Configure a program. | Enable your patients to enroll to a program in the Patient Support Services application. |
| Configure a checklist for a program. | Configure a checklist for a Patient Support Services program as an informal list of questions or tasks used as a reminder for the completion of an enrollment request. |
| Configure the auto-generation of documents. | Define the conditions for auto-generating documents for an enrollment request. |
| Add a to-dos menu item to patient portal. | Configure the patient portal to add a menu item that lists all to-do items for enrollment request tasks. |

Patient Support Services configuration tasks (continued)

| Task | Description |
|---|--|
| Configure a playbook for Patient Support Services. | Configure a playbook to provide step-by-step guidance for resolving enrollment cases. |
| Configure a Patient Support Services email notification. | Configure the email notifications sent to patients about Patient Support Services programs. |
| Determine additional user profiles. | Determine who can act as an agent connector or contributor for enrollment cases in the Patient Support Services application. |
| Set up the process for contributors to create an enrollment case. | Set up the process for creating enrollment cases on a service portal. |

Install Patient Support Services

You can install the Patient Support Services application (sn_patientservice) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).

Role required: admin

About this task

The following items are installed with Patient Support Services:

- Roles
- Tables
- ServiceNow Store applications
- Business rules

For more information, see [Components installed with Patient Support Services](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Patient Support Services application (sn_patientservice) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#).

3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.

4. Select **Install**.

Assign roles for Patient Support Services users

Assign roles to control access to features, capabilities, and data in the Patient Support Services application.

Before you begin

Set the application scope to Patient Support Services using the application picker. For more information, see [Application picker](#).

Role required: sn_patientservice.admin or admin

About this task

Users with the roles listed in the following table can use the Patient Support Services application.

Roles installed in Patient Support Services

| Role | Description | Contains roles |
|-----------------------------------|---|--|
| sn_patientservice.admin | Administers who can access the Patient Support Services application. | sn_patientservice.agent |
| sn_patientservice.agent | Views and fulfills enrollment cases as a care coordinator. | sn_hcls.healthcare_agent |
| sn_patientservice.nurse_educator | Manages training requests for a Patient Support Services as a nurse educator. | sn_hcls.practitioner |
| | <p>Note: By default, the sn_patientservice.nurse_educator role is assigned to the members of the Nurse Training Support assignment group.</p> | |
| sn_patientservice.case_creator | Creates enrollment cases for all associated objects. | sn_patientservice.case_viewer |
| sn_patientservice.agent_connector | <p>Views, creates, and updates enrollment cases for all associated objects.</p> <p>You can combine this role with other roles for a user with the</p> | <ul style="list-style-type: none"> • sn_hcls.healthcare_agent • sn_patientservice.sm_agent |

Roles installed in Patient Support Services (continued)

| Role | Description | Contains roles |
|------------------------------------|---|---|
| | agent connector profile. For more information, see Determining additional user profiles in Patient Support Services . | |
| sn_patientservice.case_task_viewer | Views all tasks associated with an enrollment case that the user has access to. | None |
| sn_patientservice.case_viewer | Views all enrollment cases available in the application. | None |
| sn_patientservice.contributor | Creates enrollment cases for patients. You can combine this role with other roles for a user with the contributor profile. For more information, see Determining additional user profiles in Patient Support Services . | <ul style="list-style-type: none"> • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_patientservice.case_task_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.health_insurance_data_viewer • sn_patientservice.case_viewer • sn_hcls.revenue_cycle_data_viewer • sn_patientservice.case_creator |
| sn_patientservice.sm_agent | Accesses and views all data related to enrollment requests as a care coordinator. | sn_patientservice.case_creator |

Procedure

Assign roles to users and groups using the Now Platform user administration feature.

- To assign a role to a user, see [Assign a role to a user](#).
- To assign a role to a group, see [Assign a role to a group](#).

Patient Support Services data model

The Patient Support Services application provides a data model for use in the Patient Support Services workflow.

Overview

The Patient Support Services data model extends the Healthcare and Life Sciences data model.

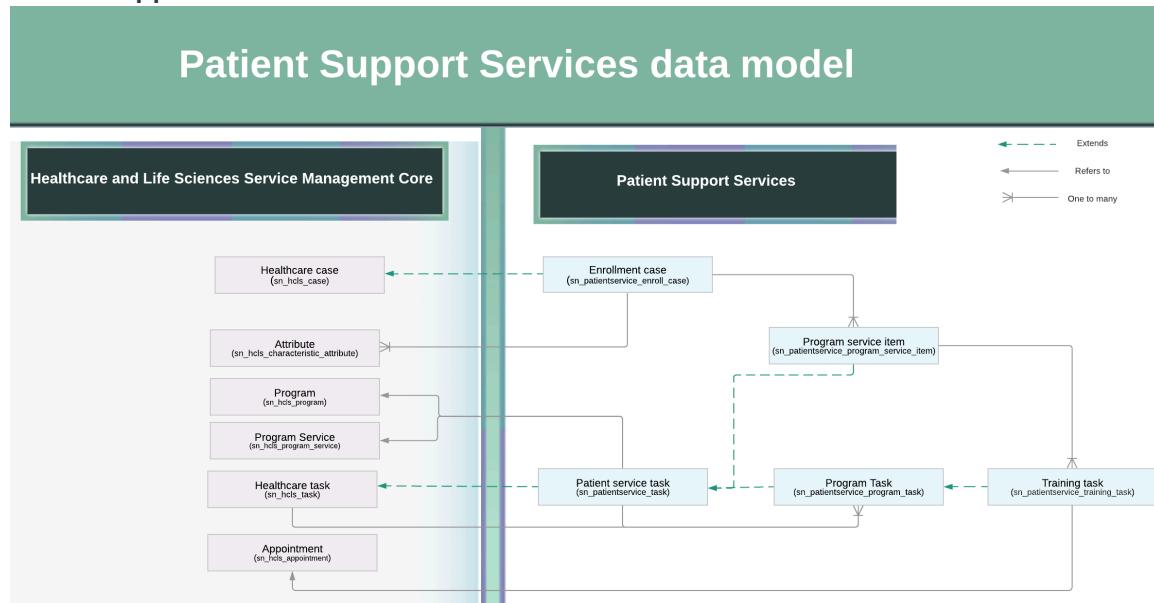
The Patient Support Services data model uses a combination of tables to store data:

- Tables that are included within the Patient Support Services application.
- Tables that are included within the Healthcare and Life Sciences Service Management Core application.

You can install the Patient Support Services application to use its data model.

The following diagram shows the tables and their relationships that comprise the Patient Support Services data model.

Patient Support Services data model



The Patient Support Services data model uses the following tables included within the Patient Support Services application to store data.

Patient Support Services application tables

| Table | Description |
|---|---|
| Enrollment case [sn_patientservice_enroll_case] | Stores the enrollment cases. The Patient field is mandatory for an enrollment case. |
| Patient service task [sn_patientservice_task] | Base task table from which Program Task [sn_patientservice_program_task] and Program service item [sn_patientservice_program_service_item] tables are extended. Extends the Healthcare Task [sn_hcls_task] table. |
| Patient service training [sn_patientservice_training_task] | Stores the details of the training tasks associated with a program task. |

Patient Support Services application tables (continued)

| Table | Description |
|--|---|
| Program service item [sn_patientservice_program_service_item] | Stores the details of the program service item tasks associated with a program service. |
| Program Task [sn_patientservice_program_task] | Stores the details of the program tasks created to fulfill services requested by a patient. |

The Patient Support Services data model uses the following tables included within the Healthcare and Life Sciences Service Management Core application.

Healthcare and Life Sciences Service Management Core application tables

| Table | Description |
|---|--|
| Attribute [sn_hcls_characteristic_attribute] | Stores the characteristics options associated with a program or program service selected by a patient when submitting an enrollment request. |
| Appointment [sn_hcls_appointment] | Stores the appointment booking details for a patient in your healthcare organization. |
| Healthcare case [sn_hcls_case] | Supports the healthcare case types. |
| Healthcare Task [sn_hcls_task] | Supports the healthcare tasks. |
| Program [sn_hcls_program] | Supports the program and training tasks. |
| Program service [sn_hcls_program_service] | Supports the program service tasks. |

For more information, see [Healthcare and Life Sciences data model](#).

Approving restricted caller access privileges for Patient Support Services

Approve restricted caller access (RCA) privileges for accessing document templates from the Patient Support Services application.

To access document templates from the Patient Support Services application, as an administrator, you must approve the required RCA privileges. For more information, see [Approving restricted caller access privileges for Healthcare and Life Sciences Service Management](#).

Configuring the enrollment request form

You can configure an enrollment request form to enable patients or practitioners to enroll into Patient Support Services programs offered by a healthcare organization.

As a healthcare provider, you can use an enrollment application form to enable patients or practitioners to submit enrollment requests.

As a user with the admin role, you can configure an enrollment application form and associate the form fields with application tables using the *PatientServicePortalUtils* script include. The script include provides a default implementation and is available within the Patient Support Services application. You can create your own implementation and associate it with the *PatientServicePortalUtils* script include. For more information, see [Script includes](#).

Configure the submission flow of the enrollment request form

Use scripted extension points to decide what records are created or updated after an enrollment request form is submitted.

Before you begin

Set the application scope to Patient Support Services using the application picker. For more information, see [Application picker](#).

Role required: admin

About this task

The Patient Support Services application installs the *sn_patientservice.EnrollmentCaseUtilService* script, the *EnrollmentCaseUtilService* script include, and the *EnrollmentCaseServiceExtPoint* extension point.

The *sn_patientservice.EnrollmentCaseUtilService* script is preconfigured for the enrollment request form available by default within the application. Before creating an enrollment case, the application runs the *sn_patientservice.EnrollmentCaseUtilService* script and uses the following submission workflow logic to create records and avoid duplication of records:

1. Create a patient record if one doesn't exist.
2. Create a consumer record if one doesn't exist.
3. Create a practitioner record if one doesn't exist.
4. Create a member plan if one doesn't exist.

Using extension points makes it easier to integrate customizations without actually altering the base code. You can extend standard base functionality using customized scripts. For more information, see [Using extension points to extend application functionality](#).

An implementation is available in the base system for scripted extension points. You can modify the data and add additional fields.

Procedure

1. Navigate to **All > System Extension Points > Scripted Extension Points**.
2. In the **API Name** column, search for and click **sn_patientservice.EnrollmentCaseServiceExtPoint**.
3. On the Extension Point form, select a script include to use the *EnrollmentCaseServiceExtPoint* extension point.
 - Modify the existing script by going to the Implementations related list and clicking **sn_patientservice.EnrollmentCaseServiceExtPoint**.
 - Create and register a custom script include.

- 4.** Customize the submission workflow logic of your enrollment form by adding the `createPatient`, `createMemberPlan`, and `createPractitioner` methods to your script include that implements the `EnrollmentCaseServiceExtPoint` extension point. You can create multiple implementations for an extension point and provide an order number for each implementation. The implementation that has the lowest order number is executed first.

Customization table of enrollment form

| Customization | Implementation |
|---|--|
| Create a patient record if none exist. | Include the <code>createPatient</code> method of the <code>EnrollmentCaseServiceExtPoint</code> extension point in the implementation. |
| Create a member plan if none exist. | Include the <code>createPatient</code> method of the <code>EnrollmentCaseServiceExtPoint</code> extension point in the implementation. |
| Create a practitioner record if none exist. | Include the <code>createPatient</code> method of the <code>EnrollmentCaseServiceExtPoint</code> extension point in the implementation. |

- 5.** On the Extension Point form, click **Update**.

Determine who can conduct a training for Patient Support Services

Add users who can conduct the trainings for Patient Support Services to the Nurse Training Support assignment group.

Before you begin

Role required: user_admin or admin

About this task

In the Patient Support Services application, the `sn_patientservice.nurse_educator` role is required to conduct trainings for a patient. Trainings are requested by a patient within a program associated with Patient Support Services. By default, the members of the Nurse Training Support assignment group are assigned the `sn_patientservice.nurse_educator` role.

Procedure

- Assign the `sn_patientservice.nurse_educator` role to the user who is conducting the training task.
For more information, see [Assign a role to a user](#).
- Add the user who is conducting the training task to the Nurse Training Support assignment group.
For more information, see [Assign a role to a group](#).

Related topics

[Groups](#)

Configuring an appointment booking setting for Patient Support Services

Enable patients to book an appointment for the training requests conducted by nurse educators.

In the Patient Support Services application, an appointment is booked for scheduling training requests included within a program service. For completing a program service item, a program task is created in the application.

The Patient Support Services application uses the Appointment Booking plugin (com.snc.appointment_booking) to create an appointment record in the Appointment [sn_hcls_appointment] table. The appointment record is created for a program task that requires appointment booking. The plugin is automatically activated after your administrator installs the Patient Support Services application. For more information about the Appointment Booking feature, see [Appointment booking components](#).

As a user with the sn_patientservice.admin role, you configure the following appointment booking settings:

1. Configure an appointment booking setting in Patient Support Services.
2. Configure an appointment booking service setting in Patient Support Services.

Note: The appointment booking feature requires configuration for a program task that offers scheduled appointments. A service configuration includes settings that apply only to that specific service.

3. Optional: Configure a day-level appointment booking setting in Patient Support Services.
4. Display an appointment booking window on a patient portal.

Related topics

[Booking appointments for Patient Support Services](#)

Configure an appointment booking setting in Patient Support Services

Set up time windows for conducting a program task that patient can use to book appointments in the Patient Support Services application.

Before you begin

Set the application scope to Patient Support Services using the application picker. For more information, see [Application picker](#).

Role required: sn_patientservice.admin

About this task

By default, the application includes the **Program service appointment** setting for a program task.

Procedure

1. Navigate to **All > Patient Support Services > Administration > Appointment booking settings**.
2. In the Appointment Booking Configuration list, either configure an existing setting or create a new one.
 - Select an existing configuration in the Appointment Booking Configuration list.
 - Create a new configuration by clicking **New** in the Appointment Booking Configuration list.

3. On the form, verify the default field values for an existing configuration, or fill in the values for a custom configuration.

Appointment Booking Configuration form

| Field | Description |
|-----------------------------------|---|
| Name | Name to identify the configuration. |
| Task Table | <p>Task table for which the appointment is created.</p> <p>The Patient service training [sn_patientservice_training_task] table is the default table for the Patient Support Services training tasks.</p> |
| Availability Method | <p>Method to determine the appointment availability.</p> <p>An availability method is one of the following types:</p> <ul style="list-style-type: none"> Number of appointments per slot <p>Specific number of appointments per time slot. This method uses a specified number of available appointments per time window. The actual number of appointments is specified in the appointment service configuration. For example, if the administrator specifies 10 appointments per window, then each appointment window has 10 available appointments. The number of available appointments for an appointment window decreases by one each time an appointment within that window is booked.</p> Scripted <p>Script to determine the number of available appointments per time window.</p> |
| Advanced Calendar view for Portal | <p>Option to display the advanced calendar view for available appointments in the Select Appointment window on the patient portal.</p> <p>The advanced calendar view displays appointments categorized in different time slots of the day, such as morning, afternoon, and evening.</p> |
| Active | Option for activating the application configuration and enabling the appointment booking. |
| Auto acceptance | <p>Option to enable the auto-acceptance of the training tasks by an agent.</p> <p>For Patient Support Services, clear the Auto acceptance check box because the appointment for a training task is booked by a patient.</p> |
| Calendar View | View of the available appointments in the Select Appointment window on the patient portal for a single day or for a week. |

| Field | Description |
|-----------------------------------|---|
| Advanced Calendar view for Portal | Advanced view of the available appointments in the Select Appointment window on the patient portal. |
| Script | Script used to determine the number of available appointments. This field appears only when Scripted is selected from Availability Method . |

4. Save your changes.

- For an existing configuration, click **Update**.
- For a new configuration, click **Submit**.

What to do next

[Configure an appointment booking service setting in Patient Support Services.](#)

Configure an appointment booking service setting in Patient Support Services

Set up an appointment booking configuration for a service provided to patients within the program tasks.

Before you begin

Role required: sn_patientservice.admin

About this task

By default, the application includes the **Program service appointment config** setting for the services included within the Patient Support Services training tasks.

Procedure

- 1.** Navigate to **All > Patient Support Services > Administration > Appointment booking settings**.
- 2.** Click the link to the appointment booking configuration with which you want to associate the setting.
- 3.** Either configure an existing setting or create a new one.
 - Select an existing configuration in the Appointment Booking Service Configuration related list.
 - Create a new configuration by clicking **New** in the Appointment Booking Service Configuration related list.
- 4.** On the form, verify the default field values for an existing configuration, or fill in the values for a custom configuration.

Appointment Booking Service Configuration form

| Field | Description |
|--------------------------------|--|
| Enable day level configuration | Option to configure different schedule on a day level when booking appointments. |
| Active | Activates appointment booking for the service. i Note: If deactivated, customers cannot schedule appointments for the service but can still create work orders. |
| General Information | |
| Name | Name to identify the service configuration. |
| Configuration | Name of the appointment booking configuration associated with this service. This field is automatically set to the selected appointment booking configuration. |
| Availability Table | Table that is used to calculate appointment availability. The default is the Appointment [sn_hcls_appointment] table. |
| Holiday Schedule | Holiday schedule to use when determining appointment availability. Click the lookup icon () and select a schedule from the Schedules list. The appointment booking feature evaluates the holiday schedule when determining the number of available appointments and excludes any day in the schedule that is set to Exclude . For more information, see Holidays . |
| Catalog Information | |
| Catalog Item | Service in the service catalog for which this appointment booking configuration is being created. Click the lookup icon () and select a service from the Record Producers list. By default, the application includes the <i>Program service appointment</i> record producer for the Program service appointment configuration. |
| Location | Field in the record provider that determines the appointment location. |

| Field | Description |
|---------------------------|--|
| Timezone | Appointment window based on the Timezone field specified in the patient record or the location where the appointment for the training task is scheduled. |
| Appointment is mandatory | Option to make creating an appointment when requesting the service as a requirement. |
| User contact | Field on the record provider that determines who the appointment is being created for. A reference field that looks for a <code>sys_user</code> variable and sets the variable on the record producer; for example, Patient . |
| Booking | |
| Appointments per window | Number of available appointments for each configured appointment time slot. The numeric value you enter determines the number of available appointments that are displayed on the Select Appointment window. |
| Lead time | Number of hours or days from the current time after which an appointment can be booked for this service. |
| Future bookable max days | Number of days prior to the current day for which an appointment can be booked for this service. |
| Reschedule/Cancel by time | Number of hours or days prior to an appointment start time that are required for an appointment to be canceled or rescheduled. If a patient attempts to cancel or reschedule an appointment within this number of hours, the Cancel button is not available. |
| Appointments | |
| Appointment window | Duration of the appointment window. Note: Allow enough time for the training to be started and completed within this window. |
| Work duration | Amount of time required to complete all tasks created by the record producer. |

| Field | Description |
|------------------------------|---|
| Travel duration (round trip) | Average travel time required for an agent. This field is not used in Patient Support Services. |
| Daily Schedule | |
| Bookable days | Days of the week for which appointments can be booked. |
| Daily start time | Earliest start time for an appointment window in a workday. |
| Daily end time | Latest end time for an appointment window in a workday. |
| Include daily break | <p>Option for scheduling a break for each bookable day.</p> <p>If you select the Include daily break check box, you can then specify the break start and end times in the boxes that appear.</p> |
| Appointment booking preview | Preview of the appointment windows and times based on the selected start and end times, break time, and appointment window. |

5. Save your changes.

- For an existing configuration, click **Update**.
- For a new configuration, click **Submit**.

Configure a day-level appointment booking setting in Patient Support Services

Create or modify different schedules on a day level when booking appointments for a program task. The appointments can be scheduled at different time slot of a day, such as morning, afternoon, or evening.

Before you begin

1. [Configure an appointment booking setting in Patient Support Services](#).
2. [Configure an appointment booking service setting in Patient Support Services](#).

Role required: admin

About this task

You can create a single or multiple day level configurations for each program task that requires an appointment booking.

Procedure

1. Navigate to **All > Patient Support Services > Administration > Appointment booking settings.**
2. Click the link to the appointment booking configuration with which you want to associate the setting.
3. Click the link to the appointment booking service configuration for which you want to configure different appointment schedules.
4. Select the **Enable day level configuration** check box.
5. In the Appointment Booking Day Configuration related list, click **New**.
6. On the form, fill in the fields.

Appointment Booking Day Configuration form

| Field | Description |
|------------------------------|---|
| Name | Name to identify the day-level configuration, such as Morning, Afternoon, or Evening. |
| Active | Option for activating the appointment slot. |
| Start date | Start date of the appointment booking window. |
| End date | End date of the appointment booking window. |
| Daily start time | Earliest start time for an appointment window in a workday. |
| Daily end time | Latest end time for an appointment window in a workday. |
| Service configuration | Name of the service configuration for which you are scheduling configurations on a day level. |
| Work duration | Amount of time required to complete all tasks created by the record producer. |
| Travel Duration (round trip) | Estimated value of the average travel time required (round trip) for the agent performing the task. This field is not applicable to Patient Support Services. |

| Field | Description |
|-----------------------------|--|
| Appointment window | <p>Duration of the appointment window.</p> <p>Note: Allow enough time for the training to be started and completed within this window.</p> |
| Appointments per window | <p>Number of available appointments for each configured appointment time slot.</p> <p>The numeric value you enter determines the number of available appointments that are displayed on the Select Appointment window.</p> |
| Include daily break | <p>Option for scheduling a break for each bookable day.</p> <p>If you select the Include daily break check box, you can then specify the break start and end times in the boxes that appear.</p> |
| Appointment booking preview | <p>Preview of the appointment windows and times based on the selected start and end times, break time, and appointment window.</p> |

7. Click **Submit**.

Displaying appointment booking window on a patient portal

Display a menu item to select appointments when booking or rescheduling an appointment for Patient Support Services on a patient portal.

By default, the *Program service appointment* record producer is available for booking appointments associated with Patient Support Services. You can use the default record producer to enable patients to book appointments or create your own record producer.

As an administrator, you can include the record producer for appointment booking in a service# catalog and display the service# catalog# as a module on a patient portal. Patients can then use the module to book appointments for a training request.

For more information, see [Record Producer](#) and [Set up a service catalog](#).

Configuring a program for Patient Support Services

Enable your patients to enroll to a program in the Patient Support Services application.

The Patient Support Services application uses the programs and program services available in the Healthcare and Life Sciences Service Management Core application. As a user with the sn.hcls_manager role, you can create programs and program services tailored to a Patient Support Services program. By default, the application includes default programs and program services that you can use as a reference while creating a program and program service. For more information, see [Configure a program service](#) and [Configure a program](#).

Configure a checklist for Patient Support Services

Configure a checklist for a Patient Support Services program as an informal list of questions or tasks used as a reminder for the completion of an enrollment request.

Before you begin

Role required: admin

About this task

The checklist feature is available with the Checklist plugin (com.glide.ui.checklist). As an administrator, you can create a checklist such as an eligibility checklist for a program or a training completion checklist for a nurse educator and associate them with a Patient Support Services program.

With the Patient Support Services application, the following checklists are available for use:

- Eligibility Checklist: A sample checklist for determining the eligibility of a patient for a Patient Support Services program.
- Nurse educator checklist: A sample checklist for conducting a training task. By default, this checklist is assigned to the Nurse Training Support group.

Alternatively, you can create a checklist using the Checklist formatter. For more information, see [Create a checklist](#).

Procedure

1. Navigate to **All > Patient Support Services > Administration > Checklist**.
2. Either configure an existing checklist or create a new one.
 - Select an existing checklist template.
 - Create new checklist template by clicking **New**.
3. On the form, verify the default field values for an existing checklist or fill in the values for a custom configuration.

Checklist Template form

| Field | Description |
|----------|---|
| Name | Name to identify the checklist template |
| User | User who created the template. |
| Group | Group who can use the checklist template. i Note: Only members of the selected group and the user who created the checklist can use the checklist as a template. Leaving this field empty prevents anyone but the template creator from using the checklist template. |
| Template | JSON representation of the checklist. |

4. Save your changes.

- Save a new checklist by clicking **Submit**.
- Save the changes to an existing checklist by clicking **Update**.

What to do next

Associate the checklist with a Patient Support Services program. For more information, see [Configuring a program for Patient Support Services](#).

Configuring the auto-generation of documents for enrollment requests

You can define the conditions for auto-generating documents for an enrollment request.

By default, privacy consent document is automatically generated for enrollment requests with the Patient Support Services workflow. However, you can create pre-filled and reusable document templates based on your workflow requirements. For more information, see [Configuring document templates for Healthcare and Life Sciences Service Management Core](#).

The privacy consent document is automatically triggered for the enrollment cases. The **Select privacy consent** decision rule generates the privacy consent document when the enrollment request review task is set to **Complete** by a care coordinator in the playbook for Patient Support Services.

As a user with the admin rule, you can configure decision tables for enrollment request documents in the Healthcare and Life Sciences Service Management Core application by navigating to **All > HCLS Service Management > Administration > Document decisions**. For more information, see [Configuring the auto-generation of documents for healthcare cases](#).

Configuring the patient portal to add a to-dos menu item for enrollment request tasks

Enable the to-dos menu item on a patient portal to display to-do items for enrollment requests.

As a patient portal administrator, you can include a to-dos menu item on the patient portal for listing the enrollment request tasks. By default, the hcls_todos page provided with the Healthcare and Life Sciences Service Management Core application is pre-configured to display to-do items for patients. You can add a menu item to the header menu of the patient portal to access the hcls_todos page. For more information, see [Configure the service portal to add a to-dos menu item for completing healthcare-related tasks](#).

Configuring playbooks for Patient Support Services

Configure a playbook to provide step-by-step guidance for resolving enrollment cases.

As a user with the admin role, you can create a playbook by using Playbooks, a Now Platform® feature. For more information, see [Process Automation Designer](#).

The playbooks in the Patient Support Services application use the CSM Configurable Workspace playbook experience. By default, the Patient Support Services application includes a playbook for assisting care coordinators to resolve enrollment cases.

Configure a playbook by navigating to **All > Process Automation > Process Automation Designer**. You can either select an existing process definition or create a new process definition for the playbook associated with enrollment cases. For more information, see [Process definitions](#).

Note: When configuring a process definition for the playbook associated with enrollment cases, ensure that the application scope is set to Patient Support Services or Healthcare and Life Sciences Service Management Core using the application picker. For more information, see [Application picker](#).

Configuring the Patient Support Services email notifications

Configure the email notifications sent to patients about Patient Support Services programs.

Patient Support Services includes the following email notifications.

Patient Support Services email notifications table

| Notification | Condition | Recipient |
|--------------------------------|--|-----------|
| Patient Enrollment rejected | An enrollment request was rejected by the care coordinator. | Patient |
| Enrollment request received | An enrollment request was received from a patient. | Patient |
| Patient support program to dos | A document task was created for the patient to review and sign the consent form. | Patient |
| Schedule training appointment | A patient has requested for a training support for a program. | Patient |
| Patient Enrollment accepted | A patient enrollment request for a program was accepted. | Patient |

As a user with the sn_patientservice.admin role, you can configure the email notifications for the Patient Support Services application, by navigating to **All > System Notification > Email > Notifications**. For more information on editing email notifications, see [Create an email notification](#).

Determining additional user profiles in Patient Support Services

You can determine who can act as an agent connector or contributor for enrollment cases in the Patient Support Services application.

As a user with the admin role, you can create contributor and agent connector profiles with the desired level of access to enrollment cases, case tasks, and other case-related information.

The sn_patientservice.agent_connector and sn_patientservice.contributor roles installed with the Patient Support Services application provide the following user profiles:

- [Agent connector](#)
- [Contributor](#)

Agent connector

An agent connector within the Patient Support Services application acts as a fulfiller who can create, update, and close enrollment cases and tasks.

As a user with the admin role, you can determine who can act as an agent connector for the enrollment cases by assigning the `sn_patientservice.agent_connector` role and other agent-specific roles to a group, and then assigning the group to the user with the agent connector profile. To assign roles to a group, see [Assign a role to a group](#).

The following table describes the location agent profile within the Patient Support Services application scope that you can refer to as an example for combining the `sn_patientservice.agent_connector` role with the [industry data model roles](#) in the CSM application.

Example agent connector profile for Patient Support Services

| Profile | Description | Assigned roles |
|----------------|--|--|
| Location agent | <p>Creates and fulfills enrollment cases in the agent's business location.</p> <p>i Note: To create enrollment cases for a service organization (business location), a user with the location agent profile must be a member of the service organization and assigned the Location Consumer Agent responsibility type. The mapping of a service organization and its members is included in the Service Organization Member [<code>sn_csm_service_organization_member</code>] table.</p> | <code>sn_patientservice.agent_connector</code> and <code>sn_customerservice.svc_location_consumer_agent</code> |

Contributor

A contributor within the Patient Support Services application acts as a requester who can create and read enrollment cases.

As a user with the admin role, you can determine who can act as a contributor to the enrollment cases by assigning the `sn_patientservice.contributor` role and other contributor roles to a group, and then assigning the group to the user with the contributor profile. To assign roles to a group, see [Assign a role to a group](#).

The following table describes different contributor profiles within the Patient Support Services application scope that you can refer to as an example for combining the `sn_patientservice.contributor` role with the [contributor roles](#) in the CSM application.

Example contributor profiles for Patient Support Services

| Profile | Description | Assigned roles |
|--------------------------|---|--|
| Relationship contributor | <p>Creates enrollment cases for only those patients with whom a relationship is established. For more information, see Create relationships.</p> <p>Note: To create enrollment cases for a patient, a user with the relationship contributor profile must have a relationship with the patient included in the Consumer Team Member [sn_customer_rel_consumer_to_user_list] table and the Relationship Manager responsibility type.</p> | sn_patientservice.contributor and sn_customerservice.relationship_contributor |
| Patient contributor | Creates enrollment cases for any patients. | sn_patientservice.contributor and sn_customerservice.consumer_contributor |
| Location contributor | <p>Creates enrollment cases for any patients in a particular service organization (business location) with which the user is associated as a service organization member.</p> <p>Note: To create enrollment cases for a service organization (business location), a user with the location contributor profile must be the member of the service organization and assigned the Location Contributor responsibility type. The mapping of a service organization and its members is included in the Service Organization Member [sn_csm_service_organization_member] table.</p> | sn_patientservice.contributor, sn_customerservice.service_organization_contributor and sn_customerservice.consumer_contributor |

Setting up the process to create enrollment cases as a contributor

Set up the process for users with the contributor roles in CSM to create enrollment cases on a service portal.

If the CSM Contributor User plugin (com.snc.csm_contributor_user) is installed in addition to the Patient Support Services application, the *Create an enrollment case* record producer is available from the Case menu on the Consumer Service Portal page to create enrollment cases. To enable users with the [contributor roles in CSM](#) for creating enrollment cases, you can use the default record producer or create your own record producer.

As an administrator, you can include the record producer for creating enrollment cases in a service# catalog and display the service# catalog# as a module on the Consumer Service Portal page. Users with the contributor profile can then use the module to create enrollment cases.

For more information, see [Record Producer](#) and [Set up a service catalog](#).

Creating enrollment cases as a contributor

Create enrollment cases for your patients from a service portal as a user with the contributor profile.

Your administrator can configure the option for creating enrollment cases. By default, the option is available from the Case menu on the Consumer Service Portal page. If you have the [contributor role in CSM](#), you can use the option to create enrollment cases from your Consumer Service Portal.

Managing enrollment requests in Workspace

As a care coordinator or a nurse educator, you can use Workspace to manage enrollment requests or training tasks, respectively.

Enrollment request workspace managing tasks

| Task | Description |
|---|--|
| Access the Workspace. | Use the home page in Workspace to quickly scan and access enrollment cases. |
| View an enrollment case in Workspace. | View an enrollment case in Workspace to complete patient enrollment activities for a patient support services program. |
| View patient information for an enrollment case in Workspace. | View the details of a patient in Workspace. |
| Work on an enrollment request case in Workspace. | Use the playbook available with the Patient Support Services application to manage enrollment cases. |
| Managing training requests in Workspace. | Manage the training support for a Patient Support Services program with training tasks and checklists. |

Viewing the landing page for enrollment cases in Workspace

As a care coordinator, you can use the landing page of the Workspace to quickly scan and access enrollment cases.

The landing page of the Workspace provides an overview of the enrollment cases assigned to you and your groups.

Role required

Care coordinators must have the sn_patientservice.agent role to use the Workspace. For more information, see [Assign roles for Patient Support Services users](#).

Accessing and using the landing page

To access the Enrollment request workspace, navigate to **All > Patient Support Services > Workspace**.

The Workspace landing page includes components that display enrollment case information, plus visualizations that further breakdown the component data. Each visualization is connected to a data source. For example, the New Cases component includes visualizations for new cases.

As a care coordinator, you can perform the following tasks from the landing page of the Workspace:

- View the case or task information presented in each component.
- Drill into each component to see the case list behind the single score.
- Navigate to individual records from the case lists.

Viewing data

The Workspace landing page for enrollment cases is same as the landing page of Workspace for any healthcare-related cases including cases created for addressing enrollment requests. For more information, see [Viewing the landing page for healthcare-related cases in Workspace](#).

Note: Your administrator can customize the landing page for Workspace and change the data that appears on it.

View an enrollment case in Workspace

View an enrollment case in Workspace to complete patient enrollment activities for a patient support services program.

Before you begin

You must have access to enrollment cases.

Role required: sn_hcls.manager, sn_patientservice.agent

Procedure

1. Open your Workspace by navigating to **All > Patient Support Services > Workspace**.
2. View enrollment cases assigned to you or your groups.
 - View enrollment cases assigned to you by navigating to **Lists > Enrollment case > My cases**.
 - View all open enrollment cases by navigating to **Lists > Enrollment case > My open cases**.
 - View enrollment cases that belong to your groups but have not been assigned to anyone by navigating to **Lists > Enrollment case > My groups unassigned cases**.
 - View all enrollment cases by navigating to **Lists > Enrollment case > All**.
3. Click the link to the case you want to view.

Result

The selected enrollment case page opens in another tab within Workspace displaying the following components:

- Playbook
- Details
- Patient information
- Tasks
- Task SLAs
- Emails
- Pre-authorization requests
- Medication Prescriptions
- Enrolled programs
- Enrolled program services
- Appointments

An enrollment case is based on a healthcare case that instead is based on a customer service case. Depending on the configurations made by your administrator and your role, additional tabs similar to a customer service case might appear for the enrollment case.

Note: The **Patient** field is mandatory for an enrollment request case.

For more information on tabs available for a customer service case, see [Customer service case form](#).

What to do next

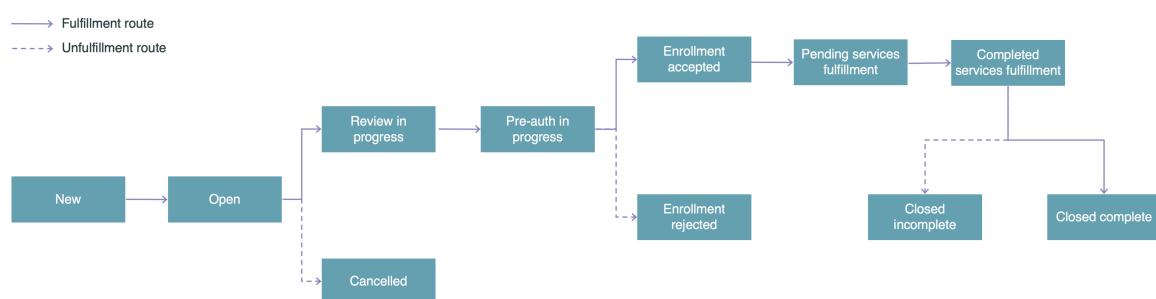
You can select the Patient information tab in Workspace to view patient details. For more information, see [Viewing patient information for an enrollment case in Workspace](#).

Life cycle of an enrollment case

Enrollment cases within the Patient Support Services application can be in one of the several states as it progresses through the fulfillment cycle.

The following diagram shows the different states of an enrollment case.

Enrollment case life cycle



Enrollment case states

| State | Description |
|-------|--|
| New | Enrollment case is created but not yet assigned to anyone. |

Enrollment case states (continued)

| State | Description |
|--------------------------------|---|
| Open | Enrollment case is assigned. |
| Review in progress | Enrollment request is being reviewed by a care coordinator. |
| Pre-auth in progress | Patient consent is reviewed by a care coordinator and pre-authorization request is in progress. |
| Enrollment accepted | Enrollment request is accepted. |
| Enrollment rejected | Enrollment request is rejected. |
| Pending services fulfillment | Pre-authorization review request is marked as completed and the services are yet to be fulfilled. |
| Completed services fulfillment | Program services associated with the enrollment request are fulfilled. |
| Closed complete | Enrollment case was closed with the resolution code and notes, and the patient was enrolled into the program. |
| Closed incomplete | Enrollment case was marked as incomplete because patient was not enrolled into the program. |
| Cancelled | Enrollment case was canceled because it was an invalid request. |

Note: You can't edit a case when the state of the case is set to **Enrollment rejected**, **Closed complete**, **Closed incomplete**, or **Cancelled**.

Viewing patient information for an enrollment case in Workspace

With the 360-degree view of a patient in Workspace, you can access the patient details anytime for completing enrollment cases.

The **Patient information** tab in Workspace provides several details about a patient enabling 360-degree view of the patient. The tab is displayed on the Workspace for enrollment cases.

Note: Your administrator can configure the Workspace to modify the patient information by using UI Builder. This topic discusses the default view for the patient information. For information about UI Builder, see [UI Builder](#).

Patient information

Patient information

Medqua Together Enrollment Case (PSS00000105)

Record Information

- Overview**
 - Patient: Gilly Parker
 - Primary email: gilly.parker402@example.com
 - Mobile phone: 111-22-5554
 - Prescriber: Amy Yang
 - Priority: 4 - Low
- Timeline**: Shows a timeline from October 2021 to July 2022.
- Active SLA**: There is no SLA defined.

Patient information displayed for an enrollment case

| Details | Description |
|-------------------|--|
| Personal details | Personal details of the patient including the name, date of birth, social security number (SSN), home phone number, email ID, and home address. |
| Insurance details | Insurance details of the patient including the member number, effective from date, RxBin number, RxGroup number, group number, effective to date, RxPCN number, and subscriber name. |
| Household members | Members of the household associated with the patient. Click the member name or responsibility to view the household member relationship details with the patient. |
| Conditions | Number of health conditions observed in the patient. Click the number to view a list of conditions associated with the patient. |
| Medications | Number of medications taken by the patient. |

Patient information displayed for an enrollment case (continued)

| Details | Description |
|---------------------|--|
| | Click the number to view a list of medications associated with the patient. |
| Allergies | Number of allergies observed in the patient. Click the number to view a list of allergies associated with the patient. |
| Immunizations | Number of vaccines administered for the patient. Click the number to view a list of immunizations associated with the patient. |
| Cases overview | Donut chart displaying enrollment cases associated with the patient by status. Click a status slice to view a list of cases in that status. |
| Claims overview | Donut chart displaying claims associated with the patient by status. Click a status slice to view a list of claims in that status. |
| Recent interactions | List of interactions that have been created for the patient. Click an interaction number to view more details about the interaction. |
| Appointments | List of appointments scheduled for the patient. Click an appointment number to view more details about the appointment. |
| Enrolled Programs | List of programs a patient is enrolled into and the enrollment date. Click a program name to view more details about the program. |
| Prescriptions | List of medication products prescribed for the patient. Click a medication product to view more details about the product. |
| Record Information | Contextual side panel used for viewing an overview of a patient record, the case timeline, and the time remaining out of the total SLA time associated with the enrollment case. |

Working on an enrollment case in Workspace

Use the playbook available with the Patient Support Services application to manage enrollment cases and complete requests for patient support services.

The playbook experience provides fulfillers with visibility into cross-business workflows and the actionable activities used to complete these workflows. When the playbook experience is activated with Workspace in Patient Support Services, the **Playbook** tab appears for an

enrollment case. For more information on how to interact with a playbook, see [Interact with Playbook](#).

As a care coordinator with the sn_patientservice.agent role, you can use the Patient Support Services playbook to complete all enrollment request activities for a patient. You can access the **Playbook** tab on your Workspace when an enrollment case is assigned to you. The Patient Support Services workflow populates the case data for all launched activities on the **Playbook** tab. You can select a stage in the playbook to complete the activities associated with the stage.

By default, the following stages are available to you as a care coordinator with the sn_patientservice.agent role on the **Playbook** tab of the Enrollment request workspace.

Patient Support Services playbook stages

| Stage | Description |
|-----------------------|---|
| Intake | Complete the initial enrollment application review activities. |
| Benefit investigation | Capture or review the benefits investigation preference opted by the patient and manage the pre-authorization activities. i Note: By default, the Benefit Investigation characteristic is available for a program within the Patient Support Services application. Your administrator can add more characteristics and associate them with one or more programs. Depending on the configuration, the activities associated with a characteristic might appear in the playbook. |
| Prescription details | Place a prescription order. |
| Program services | Review and fulfill the program services that the patient has been enrolled into. |
| Resolve and close | Close the enrollment request. |

i Note: The state of the enrollment case progresses as you complete a stage in the playbook. For more information, see [Life cycle of an enrollment case](#).

Completing the initial review activities

In the **Intake** stage of the playbook, complete the following activities:

- 1. Review enrollment details:** Review the patient, prescriber, program, and program services details entered for a patient included within an enrollment request. When the Review enrollment details activity is set to complete, the Patient Support Services workflow automatically sends a consent form to the patient.
- 2. Review insurance details:** Capture or review the insurance information of the patient.

As a care coordinator, you can contact the patient directly to verify the insurance information. You can enter or review the insurance information from the **Review Insurance**

activity of the playbook for Patient Support Services in your Workspace and mark the activity as complete when done.

- 3. Review prescription:** Capture or review the prescription ordered for a patient. You can add a new prescription record to include the prescription details. If there is no prescription available to you, contact the prescriber to enter the prescription details.

To add a new prescription, click **Add new**, fill in the details of the prescription in the Medication Prescription form, and click **Save**. For more information, see [Medication Prescription form](#).

i Note: If there is no medication product associated with the program, the **Review prescription** activity doesn't appear in the playbook.

- 4. Review patient consent:** Check the status of completion of the patient consent form assigned to the patient. After the patient completes the to-do item for the consent form, the consent is listed in the activity. As a care coordinator, you can then review the consent and mark the **Review patient consent** activity to complete in the playbook.
- 5. Review enrollment eligibility:** Accept or reject the enrollment request based on the eligibility checklist.

Completing the benefit investigation activities

In the **Benefit investigation** stage of the playbook, complete the following activities:

- 1. Review patient preference:** Review the benefits investigation preference opted by the patient.
- 2. Review specialty pharmacy details:** Review the specialty pharmacy details as provided by the patient. The **Review specialty pharmacy details** activity appears only when the patient has selected specialty pharmacy in the enrollment request form.
- 3. Review pre-authorization:** Review and verify if pre-authorization is required for the program. If pre-authorization is required, click **Add new**, fill in the details of pre-authorization details provided by a payer organization in the Pre-authorization request form, and click **Save**. For more information, see [Pre-authorization request form](#).

i Note: If pre-authorization is not required for the medication prescription, you can skip this activity.

Placing a prescription order

In the **Prescription details** stage of the playbook, complete the **Submit prescription order** activity by contacting the pharmacy to place the prescription order. In addition, verify the medicine dosage and delivery location with the pharmacy and capture the expected delivery date.

i Note: If there is no medication product associated with the program, the **Prescription details** stage doesn't appear in the playbook.

Fulfilling the program services

In the **Program services** stage of the playbook, complete the **Fulfill services** activity by reviewing and fulfilling the program services that the patient has been enrolled into. The **Fulfill services** activity provides the complete visibility into the services fulfillment status.

In the **Number** column of the **Fulfill services** activity, click a program number and when a program service is completed, mark the activity as complete. If required, you can capture

the shipping details in the **Fulfill services** activity along with other details including the tracking number.

Note: You can either fulfill the services on your own or assign them to another team who can fulfill the services activity.

When all the program services are fulfilled, the status of the associated enrolled program service record changes to **Fulfilled** and the date fulfilled is automatically set to the current date.

Closing the enrollment request

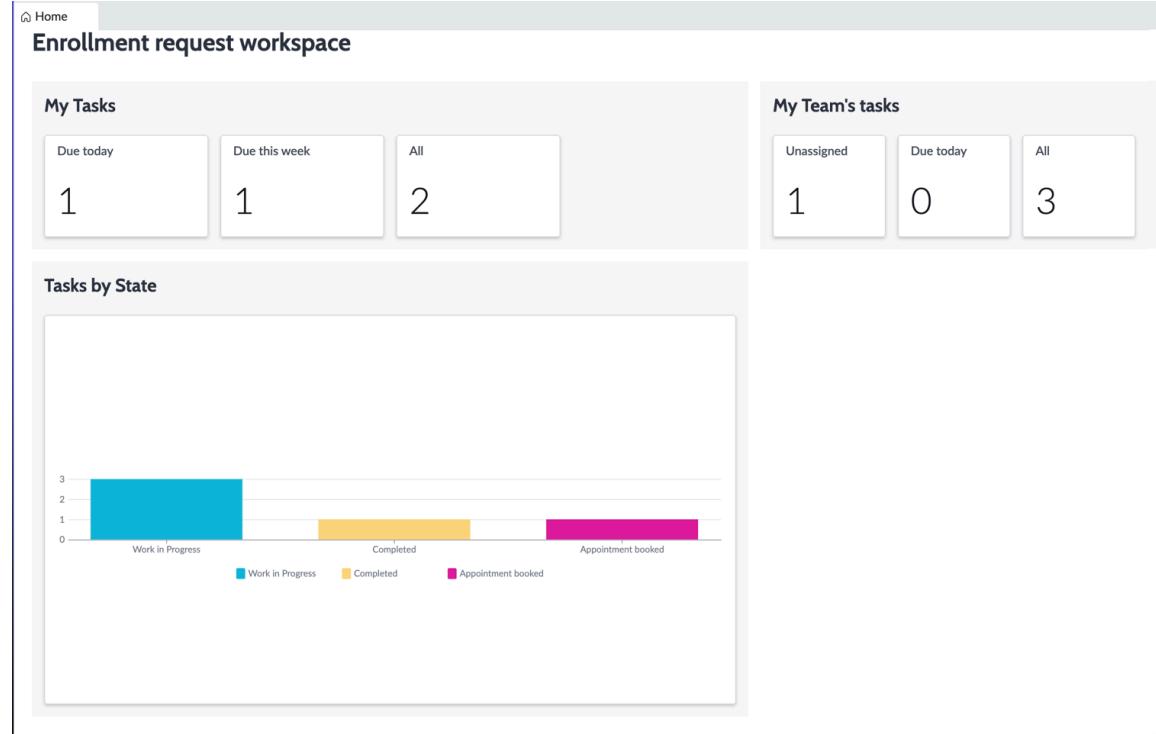
In the **Resolve and close** stage of the playbook, complete the **Close enrollment request** activity by waiting until all other activities are completed, and then selecting a resolution code and adding any resolution notes. For the case marked as closed complete, a survey is sent out to the patient to fill in.

Viewing the home page for enrollment-related training tasks in Workspace

As a nurse educator, you can use the home page of the Workspace to quickly scan and access training requests for an enrollment program.

The home page of the Workspace provides an overview of the training tasks assigned to you and your groups.

Training tasks in Workspace



Role required

A nurse educator must be a member of the Nurse Training Support assignment group or must be assigned the sn_patientservice.nurse_educator role to use the Workspace for viewing training tasks for Patient Support Services programs. For more information, see [Assign roles for Patient Support Services users](#).

Accessing training tasks from home page

To access the Workspace, navigate to *Patient Support Services > Workspace*.

The Workspace home page includes components that display training task information.

As a nurse educator, you can perform the following tasks from the home page of the Enrollment request workspace:

- View your task information presented in each component.
- Drill into each component to see the task list behind the single score.
- Navigate to individual records from the task lists.

Viewing data

As a nurse educator, you can view the following sections in the Workspace by default:

- [My Tasks](#)
- [Tasks by State](#)
- [My Team's tasks](#)

i Note: Your administrator can customize the home page for Workspace and change the data that appears on it.

My Tasks

The My Tasks section shows indicators for training tasks with appointment book state and assigned to you. Monitor this section to ensure that your immediate tasks are completed.

Reports on your tasks

| Indicator | Description |
|---------------|--|
| Due today | Number of tasks assigned to you with the status appointment booked and appointment time due on the current date. |
| Due this week | Number of tasks assigned to you with the status appointment booked and appointment time due the current week. |
| All | Number of all training tasks assigned to you. |

Tasks by State

The Tasks by State section shows a bar chart displaying all the training requests in your ServiceNow instance grouped by state.

My Team's tasks

The My Teams' Cases section shows indicators for training tasks that are assigned to your group.

Reports on your team's cases

| Indicator | Description |
|------------|---|
| Unassigned | Number of training tasks that still need to be assigned to a team member. |
| Due today | Number of training tasks for your team that are due on the current date. |
| All | Number of all training tasks for your team. |

View a training task in Workspace

View a training task in Workspace to complete enrollment activities for a patient support services program.

Before you begin

Role required: sn_patientservice.nurse_educator

About this task

A training task is created based on the appointment booking workflow. For more information, see [Appointment booking workflow in Patient Support Services](#).

Procedure

1. Open your Workspace by navigating to **All > Patient Support Services > Workspace**.
2. View training tasks assigned to you or your groups.
 - View training tasks assigned to you by navigating to **Lists > Conduct training tasks > My tasks**.
 - View training tasks that belong to your groups but have not been assigned to anyone by navigating to **Lists > Conduct training tasks > My groups unassigned tasks**.
 - View all training tasks by navigating to **Lists > Conduct training tasks > All**.
3. Click the link to the training task you want to view.

Result

The selected training task page opens in another tab within Workspace displaying the details of the training task.

What to do next

[Manage a training task in Workspace](#).

Manage a training task in Workspace

Manage the training support for a Patient Support Services program with training tasks and checklists.

Before you begin

You must have access to enrollment cases.

Role required: sn_patientservice.nurse_educator

About this task

A training task is created based on the appointment booking workflow. For more information, see [Appointment booking workflow in Patient Support Services](#).

Procedure

1. Open your Workspace by navigating to **All > Patient Support Services > Workspace**.
2. Go to **Lists > Conduct training tasks > My tasks**.
3. Click a link to the task you want to update the status for.
You can work on a training task when the state of the task is **Booked appointment**. In the Patient Support Services application, the training tasks are booked by patients.
4. In the **State** field, update the status of your task.
 - Select **Work in progress** when you are still conducting the task.
 - Select **Completed** when the task is completed.
 - Select **Canceled** when the task could not be completed.
5. Save your changes.
 - When the task is still in progress or canceled, click **Save** on the training page.
 - When the task is completed, click **Complete** on the training page.

Result

The status of the task is reflected on the Fulfill services task page of the Program services activity in the playbook. For more information, see [Working on an enrollment case in Workspace](#).

Appointment booking workflow in Patient Support Services

You can enable patients to book appointments for a training request within the Patient Support Services application by using the appointment booking feature.

The appointment booking feature in the Patient Support Services application uses the following workflow:

1. A patient views available appointment windows, makes a selection, and books an appointment for a training request from their patient portal.
2. Booking an appointment creates a record in the Appointment [sn_hcls_appointment] table and a training task record is created. An email notification about the booked appointments is sent to the patient.
3. The training task is automatically assigned to the Nurse Training Support assignment group and a nurse educator who is a member of the Nurse Training Support assignment group works on the task.
4. The nurse educator then conducts the training for the patient based on the scheduled appointment dates and updates the state of the training task in Workspace. The nurse educator can access the training checklist, complete the checklist during the training, and capture notes in the task.

To get started on the appointment booking feature, see [Configuring an appointment booking setting for Patient Support Services](#).

Completing to-do items for Patient Support Services

View and complete all to-do items assigned to you as a patient from the patient portal.

The to-dos page is where you as a patient can view and complete all your to-dos on a single page on the patient portal. By default, the following to-do items are assigned for procedure requests:

- Review and sign the privacy consent form.
- Book an appointment for a training program.

For each of the to-do item, you receive an email notification containing the item information and the link to the patient portal. You can access the to-dos page and complete your to-do items.

(i) Note: Your administrator can configure the to-dos page to add more to-do items.

Booking appointments for Patient Support Services

Book an appointment as a patient for the training requests within a Patient Support Services program.

As a patient, you can view available appointment windows, make a selection, and book an appointment for a training request from your patient portal.

Your administrator can configure the appointment window available for selecting appointments. You can use the appointment window available within your patient portal to view available appointment time slots, select the desired day and time, and submit the appointment request. For an example use of the appointment booking feature, see [Book an appointment from the portal ↗](#) and [Select the Appointment window ↗](#).

After you book an appointment, a training task is created for the nurse educator and the appointment confirmation email notification is sent to you.

For more information, see [Appointment booking workflow in Patient Support Services](#).

Related topics

[Appointment booking workflow in Patient Support Services](#)

[Configuring an appointment booking setting for Patient Support Services](#)

Analytics and reporting for Patient Support Services

Patient Support Services contains a preconfigured dashboard with actionable data visualizations that help you improve your business processes and quantify the value of self-service.

The [Patient Support Services dashboard](#) is available in the Patient Support Services application.

Patient Support Services dashboard

Monitor the status of open enrollment cases to streamline patient enrollment activities for the Patient Support Services programs.

Patient Support Services dashboard

≡ Patient Support Services ▾

Critical Cases Open

0

Unassigned cases

9

Active SLA Breached Cases

6

Open cases

14

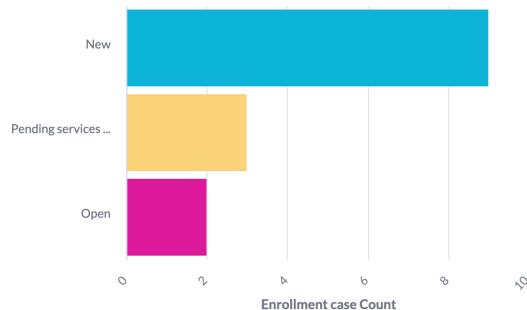
Open Cases not Updated for 7 Days

12

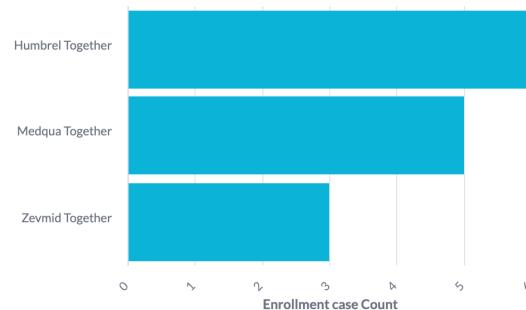
Active Programs

3

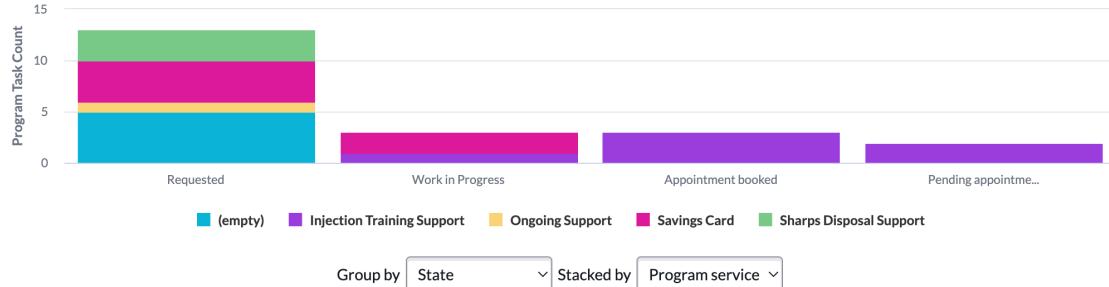
Open cases - By State



Open cases - By Program



Open Fulfilment tasks



Access the Patient Support Services dashboard

To open the dashboard, navigate to *Patient Support Services*>**Dashboard**.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Dashboard use cases

| User | Dashboard use |
|--|--|
| sn_patientservice.agent or sn_hcls.manager | Monitors enrollment cases and measures the performance to stay on top of the backlog to provide a streamlined experience for patients. |

Reports

Dashboard reports

| Title | Type | Source table | Description |
|-----------------------------------|---|--|--|
| Critical Cases Open | Single Score  | Enrollment case [sn_patientservice_enrollment] | Count of priority 1 enrollment cases that are still open. |
| Unassigned cases | Single Score  | Enrollment case [sn_patientservice_enrollment] | Count of enrollment cases that are not assigned to patient service representatives. |
| Active SLAs Breached Cases | Single Score  | Enrollment case [sn_patientservice_enrollment] | Count of enrollment cases that breached the service level agreement (SLA) of your business. |
| Open cases | Single Score  | Enrollment case [sn_patientservice_enrollment] | Count of enrollment cases that are still open. |
| Open Cases not Updated for 7 Days | Single Score  | Enrollment case [sn_patientservice_enrollment] | Count of enrollment cases that are not updated for the last seven days. |
| Active Programs | Single Score  | Program [sn_hcls_program] | Count of active programs. |
| Open cases - By State | Horizontal Bar  | Enrollment case [sn_patientservice_enrollment] | Status of all open enrollment cases categorized by their state as Completed services fulfillment , Enrollment accepted , New , Open , Pending services fulfillment , or Review in progress . |
| Open cases - By Program | Horizontal Bar  | Enrollment case [sn_patientservice_enrollment] | Count of all open enrollment cases categorized by the |

Dashboard reports (continued)

| Title | Type | Source table | Description |
|-----------------------|--|--|---|
| | | | programs they are associated with. |
| Open Fulfilment tasks | Bar  | Program Task [sn_patientservice_programtask] | Count of all open program tasks grouped by their state and stacked by their program service item. |

Patient Support Services reference

Reference topics provide additional information about Patient Support Services components.

Components installed with Patient Support Services

Several types of components are installed with installation of the Patient Support Services application, including tables, user roles, ServiceNow Store applications, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see [Find components installed with an application](#).

Demo data is available for this feature.

Roles installed

Roles installed in Patient Support Services

| Role | Description | Contains roles |
|----------------------------------|---|--------------------------|
| sn_patientservice.admin | Administers who can access the Patient Support Services application. | sn_patientservice.agent |
| sn_patientservice.agent | Views and fulfills enrollment cases as a care coordinator. | sn_hcls.healthcare_agent |
| sn_patientservice.nurse_educator | Manages training requests for a Patient Support Services as a nurse educator. | sn_hcls.practitioner |

Note: By default, the sn_patientservice.nurse_educator role is assigned to the members of the Nurse Training Support assignment group.

Roles installed in Patient Support Services (continued)

| Role | Description | Contains roles |
|------------------------------------|--|---|
| sn_patientservice.case_creator | Creates enrollment cases for all associated objects. | sn_patientservice.case_viewer |
| sn_patientservice.agent_connector | <p>Views, creates, and updates enrollment cases for all associated objects.</p> <p>You can combine this role with other roles for a user with the agent connector profile. For more information, see Determining additional user profiles in Patient Support Services.</p> | <ul style="list-style-type: none"> • sn_hcls.healthcare_agent • sn_patientservice.sm_agent |
| sn_patientservice.case_task_viewer | Views all tasks associated with an enrollment case that the user has access to. | None |
| sn_patientservice.case_viewer | Views all enrollment cases available in the application. | None |
| sn_patientservice.contributor | <p>Creates enrollment cases for patients.</p> <p>You can combine this role with other roles for a user with the contributor profile. For more information, see Determining additional user profiles in Patient Support Services.</p> | <ul style="list-style-type: none"> • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_patientservice.case_task_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.health_insurance_data_viewer • sn_patientservice.case_viewer • sn_hcls.revenue_cycle_data_viewer • sn_patientservice.case_creator |
| sn_patientservice.sm_agent | Accesses and views all data related to enrollment requests as a care coordinator. | sn_patientservice.case_creator |

Tables installed

Patient Support Services application tables

| Table | Description |
|--|---|
| Enrollment case [sn_patientservice_enroll_case] | Stores the enrollment cases. The Patient field is mandatory for an enrollment case. |
| Patient service task [sn_patientservice_task] | Base task table from which Program Task [sn_patientservice_program_task] and Program service item [sn_patientservice_program_service_item] tables are extended. Extends the Healthcare Task [sn_hcls_task] table. |
| Patient service training [sn_patientservice_training_task] | Stores the details of the training tasks associated with a program task. |
| Program service item [sn_patientservice_program_service_item] | Stores the details of the program service item tasks associated with a program service. |
| Program Task [sn_patientservice_program_task] | Stores the details of the program tasks created to fulfill services requested by a patient. |

ServiceNow Store applications installed

ServiceNow Store application installed in Patient Support Services

| Application | Description |
|--|--|
| Healthcare and Life Sciences Service Management Core (sn_hcls) | Provides a data model and critical digital health capabilities including patient 360-degree view, consent management, and digital documentation to better address healthcare services. |

Business rules installed

Business rules installed in Patient Support Services

| Business rule | Table | Rule criteria | Description |
|----------------------------------|---|-------------------------|--|
| Auto assessment business rule | Enrollment case [sn_patientservice_enroll_case] | After insert | Triggers a patient satisfaction survey when an enrollment case is set to Closed complete . |
| Cancel playbook on case inactive | Enrollment case [sn_patientservice_enroll_case] | After update | Disables the activities in a playbook when the associated enrollment case state is set to Closed complete , Closed incomplete , or Canceled . |
| Change Appointment state | Patient service training [sn_patientservice_training_task] | After update | Sets an appointment state to Fulfilled or Canceled when the associated conduct training task state is set to Completed or Canceled , respectively. |
| Populate patient and insurance | Pre-authorization request [sn_hcls_pre_auth_header] | After insert | Populates patient, practitioner, and insurance details on the Pre-authorization details form based on the name of a patient entered in an enrollment case. |
| Populate patient and prescriber | Medication Prescription [sn_hcls_medication_prescription] | After insert | Populates patient and practitioner details on the Medication Prescription form based on the name of a patient entered in an enrollment case. |
| Set Child items to Cancelled | Enrollment case [sn_patientservice_enroll_case] | After insert and update | Cancels all child items including open patient tasks, open enrolled program service, open enrolled program, and doc tasks when |

Business rules installed in Patient Support Services (continued)

| Business rule | Table | Rule criteria | Description |
|--------------------------------------|--|---------------|--|
| | | | an enrollment case state changes to Closed incomplete or Canceled . |
| Set EPS state to Canceled | Program service item [sn_patientservice_program_service_item] | After update | Sets the state of an enrolled program service to Canceled when the associated program service item state is set to Canceled . |
| Set EPS state to Fulfilled | Program service item [sn_patientservice_program_service_item] | After update | Sets the state of an enrolled program service to Fulfilled when the associated program service item state is set to Completed . |
| Set EPS state to Pending Fulfillment | Program service item [sn_patientservice_program_service_item] | After update | Sets the state of an enrolled program service to Pending Fulfillment when the associated program service item state is set to Work in Progress . |
| Set PSI state to Canceled | Program Task [sn_patientservice_program_task] | After update | Sets the program service item state to Canceled when the associated program task state is set to Canceled . |
| Set PSI state to Completed | Program Task [sn_patientservice_program_task] | After update | Sets the program service item state to Completed when the associated program task state is set to Completed . |
| Set PSI state to Work In Progress | Program Task [sn_patientservice_program_task] | After update | Sets the program service item state to Work in Progress when the associated program |

Business rules installed in Patient Support Services (continued)

| Business rule | Table | Rule criteria | Description |
|---------------------------------|--|-------------------------|---|
| | | | task state is set to Work in Progress . |
| Set Short description | Enrollment case [sn_patientservice_enroll_case] | After update | Sets the short description of an enrollment case in the format <program name> Enrollment Case when the enrollment case is created or updated. |
| Set State to Open when Assigned | Enrollment case [sn_patientservice_enroll_case] | After insert and update | Sets the enrollment case state to Open when the case is assigned to a care coordinator. |

Domain separation and Patient Support Services

Domain separation is supported for Patient Support Services. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see [Application support for domain separation](#).

Overview

The Patient Support Services application includes domain separation for transactional data like enrollment cases and healthcare tasks including program tasks and program service tasks. The application is based on the [Healthcare and Life Sciences data model](#) that also includes domain separation.

How domain separation works in Patient Support Services

For customers using the Patient Support Services application to raise enrollment requests, the domain is set from the logged-in user's session, in the case and tasks created, and the associated healthcare data.

Use cases

When healthcare providers have their healthcare data separated by domains, the healthcare requests and corresponding fulfillment tasks are associated with the respective customer domains.

Pre-Visit Management

With the ServiceNow® Pre-Visit Management application, streamline the scheduling process of procedure requests for patients and increase visibility to pre-authorization approvals prior to scheduled procedures.

Request apps on the Store

Visit the [ServiceNow Store](#)  website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#) .

| | | |
|--|---|---|
| <p>Explore</p>  <p>Learn about how healthcare organizations use Pre-Visit Management.</p> | <p>Configure</p>  <p>Plan and configure your implementation.</p> | <p>Manage</p>  <p>Manage procedure requests from the Workspace.</p> |
| <p>Complete</p>  <p>Complete your to-do items for procedure requests.</p> | <p>Contribute</p>  <p>Create procedure request cases as a contributor.</p> | <p>Reference</p>  <p>Get details about components including tables and properties.</p> |

Analytics and reporting



Coordinate work and improve processes with dashboards and reports.

Exploring Pre-Visit Management

Whether you're starting or expanding your implementation of the Pre-Visit Management application, consider learning more about features available to streamline and digitize the scheduling of procedure requests for your patients.

Overview

Make it easy for patients to digitally review and sign all the required paperwork for procedure scheduling requests by using the Pre-Visit Management application.

For healthcare providers with paper-based processes or multiple EMR systems, managing procedure requests including pre-authorization, approvals, and consent across teams and patients can prove expensive, time-consuming, and less efficient. As a healthcare provider, the Pre-Visit Management application enables you to provide healthcare services by efficiently managing workflows around procedure scheduling requests.

For patient service representatives, the Pre-Visit Management playbook provides a guided experience to review procedure requests, verify patient information, identify and assign the required consent tasks and forms, and send the appropriate documentation to the patient's insurance organization for pre-authorization.

The Pre-Visit Management application uses the data model provided by the Healthcare and Life Sciences Service Management Core application. The procedure requests are submitted as procedure request cases and assigned to patient service representatives who can then use a guided playbook within their Workspace for closing a procedure request case.

Benefits

Pre-Visit Management provides the following benefits:

Pre-Visit Management benefits

| Benefits | Key feature | Role |
|--|--|---------|
| Improve the patient experience by enabling them to digitally complete all the to-do items associated with a procedure request from a patient portal with | Completing to-do items from the patient portal | Patient |

Pre-Visit Management benefits (continued)

| Benefits | Key feature | Role |
|---|--|------------|
| digital documentation and digital consent. | | |
| Provide a guided experience for patient service representatives to complete procedure requests from Workspace by using the Pre-Visit Management playbook. | Managing procedure requests in Workspace | HCLS Agent |
| Manage appointments for scheduling a procedure request within Workspace. | Managing appointment bookings for procedure requests | HCLS Agent |

To get started with the Pre-Visit Management application, see [Configuring Pre-Visit Management](#).

Pre-Visit Management - Workflow scenario

Use the Pre-Visit Management application for streamlining pre-visit activities for a procedure request including patient to-dos, approvals, pre-authorization, and scheduling.

Scenario: A physician orders the colonoscopy procedure for a patient from an EMR system. When a procedure request case is created in the ServiceNow instance, the Pre-Visit Management workflow initiates a playbook configured for procedure request cases. The case gets assigned to John Jason from the patient services group.

The following graphic shows how the Pre-Visit Management application is used for managing the colonoscopy procedure request for a patient as discussed in the scenario.

Using the Pre-Visit Management application for managing a procedure request

Pre-Visit Management

A workflow to streamline patient pre-visit activities.



The patient service representative reviews a new request case and selects a workflow for the patient's care. Tasks are assigned and notifications are automatically sent as needed throughout the workflow.



The patient logs in to the patient portal to review and sign forms.



The patient service representative obtains insurance pre-authorization.



The scheduling group coordinates procedure appointment with



The following workflow elaborates how various users use the Pre-Visit Management application for the colonoscopy procedure:

1. John uses the Workspace to view the procedure request case.
2. In the Workspace, John can view complete information about the patient from the **Patient information** tab.

John validates the patient details including insurance on file, contact information, and medical history.
3. John then selects the **Playbook** tab to view all the necessary case-related information.

The layout of a playbook enables patient service representatives to focus on the steps they are responsible for, while providing full visibility into the end-to-end process life cycle.
4. As listed in the playbook, John first completes the order review by performing the following tasks:
 - a. Reviews the order details and gets additional justification by the physician.
 - b. Marks the review as complete.
5. The Pre-Visit Management workflow automatically assigns to-dos to the patient and sends an email notification about to-do items to the patient.
6. The patient logs in to the patient portal and sees the pending to-do items.
7. In the patient portal, the patient performs the following tasks:
 - a. Opens the privacy consent, reviews it, and signs it.
 - b. Reviews and confirms the insurance information.
8. As listed in the playbook, John then works with the insurance company and gets the pre-authorization approved for the patient by performing the following tasks:
 - a. Creates pre-authorization request for the procedure.
 - b. Reviews and confirms the pre-authorization received from the insurance company.
9. The Pre-Visit Management workflow triggers another task for scheduling the procedure and assigns it to Ben Jackson from the procedure scheduling group.
10. Ben then books an appointment for the patient by performing the following tasks:
 - a. Coordinates with the patient and the physician to schedule the procedure.
 - b. Selects the **Appointment** tab in the Workspace and books an appointment for the patient.
11. An email notification is generated and sent to the patient with appointment details.
12. The procedure request case is set to complete.
13. Three days before the procedure, the Pre-Visit Management workflow automatically assigns a to-do item to the patient to review and sign the procedure consent and sends an email notification to the patient.
14. Patient logs in to the patient portal and reviews and submits the procedure consent online.

Configuring Pre-Visit Management

Set up the Pre-Visit Management application to complete pre-visit activities associated with a procedure.

Note: The Pre-Visit Management application is based on the [Healthcare and Life Sciences data model](#) and stores all procedure requests in the Procedure request [sn_previsit_procedure_request] table.

The following table provides an overview of the configuration tasks required for Pre-Visit Management.

Pre-Visit Management configuration tasks

| Task | Description |
|---|--|
| Install Pre-Visit Management. | Install the Pre-Visit Management application to work on procedure requests. |
| Assign roles for Pre-Visit Management users. | Assign roles to control access to features, capabilities, and data in the Pre-Visit Management application. |
| Approve restricted caller access privileges for Pre-Visit Management. | Approve restricted caller access (RCA) privileges for accessing document templates from the Pre-Visit Management application. |
| Determine who can work on the appointment booking task for a procedure. | Add users who can work on the appointment booking task for a procedure to the Procedure scheduler assignment group. |
| Configure when to send the procedure consent form to a patient. | Configure the Pre-Visit Management application to when to send the procedure consent document for review and signature to a patient before the procedure appointment date. |
| Specify a to-do item for patients. | Add a to-do item that patients must complete as part of their pre-visit planning. |
| Configure the auto-generation of documents for a procedure request. | Define the conditions for auto-generating documents for a procedure request. |
| Configure the patient portal to add a to-dos menu item for procedure request tasks. | Configure the patient portal to add a menu item that lists all to-do items for patients. |
| Configure a playbook for Pre-Visit Management. | Configure a playbook to provide step-by-step guidance for resolving procedure request cases. |
| Configure a Pre-Visit Management email notification. | Configure the Pre-Visit Management email notifications sent to patients about pre-visit activities for procedure requests. |

Pre-Visit Management configuration tasks (continued)

| Task | Description |
|---|---|
| Determine additional user profiles. | Determine who can act as an agent connector or contributor for procedure request cases. |
| Set up the process for contributors to create a procedure request case. | Set up the process for creating procedure request cases on a service portal. |

Install Pre-Visit Management

You can install the Pre-Visit Management application (sn_previsit) if you have the admin role. The application includes demo data and installs related ServiceNow® Store applications and plugins if they are not already installed.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).

Role required: admin

About this task

The following items are installed with Pre-Visit Management:

- Roles
- Tables
- ServiceNow Store applications
- Scheduled jobs
- Business rules

For more information, see [Components installed with Pre-Visit Management](#).

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Pre-Visit Management application (sn_previsit) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

Visit the [ServiceNow Store](#) website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#).

3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. Select **Install**.

Assign roles for Pre-Visit Management users

Assign roles to control access to features, capabilities, and data in the Pre-Visit Management application.

Before you begin

Set the application scope to Pre-Visit Management using the application picker. For more information, see [Application picker](#).

Role required: sn_previsit.admin, sn_hcls.admin, or admin

About this task

Users with the roles listed in the following table can use the Pre-Visit Management application.

Roles installed with Pre-Visit Management

| Role | Description | Contains roles |
|-----------------------------------|--|--|
| sn_previsit.admin | Administers who can access the Pre-Visit Management application. | sn_previsit.patient_service_agent |
| sn_previsit.patient_service_agent | Views and fulfills procedure request cases as a patient service representative. | sn_hcls.healthcare_agent |
| sn_previsit.case_creator | Creates procedure request cases for all associated objects. | sn_previsit.case_viewer |
| sn_previsit.agent_connector | <p>Views, creates, and updates procedure request cases for all associated objects.</p> <p>You can combine this role with other roles for a user with the agent</p> | <ul style="list-style-type: none"> • sn_hcls.healthcare_agent • sn_previsit.sm_agent |

Roles installed with Pre-Visit Management (continued)

| Role | Description | Contains roles |
|-------------------------|--|---|
| | <p>connector profile. For more information, see Determining additional user profiles in Pre-Visit Management.</p> | |
| sn_previsit.case_viewer | <p>Views all procedure request cases available in the application.</p> | None |
| sn_previsit.contributor | <p>Creates procedure request cases for patients. You can combine this role with other roles for a user with the contributor profile. For more information, see Determining additional user profiles in Pre-Visit Management.</p> | <ul style="list-style-type: none"> • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.health_insurance_data_viewer • sn_previsit.case_viewer • sn_hcls.revenue_cycle_data_viewer • sn_previsit.case_creator |
| sn_previsit.sm_agent | <p>Accesses and views all data related to procedure requests as a patient service representative.</p> | sn_previsit.case_creator |

Procedure

Assign roles to users and groups using the Now Platform user administration feature.

- To assign a role to a user, see [Assign a role to a user](#).
- To assign a role to a group, see [Assign a role to a group](#).

Approving restricted caller access privileges for Pre-Visit Management

Approve restricted caller access (RCA) privileges for accessing document templates from the Pre-Visit Management application.

To access document templates from the Pre-Visit Management application, as an administrator, you must approve the required RCA privileges. For more information, see [Approving restricted caller access privileges for Healthcare and Life Sciences Service Management](#).

Determine who can work on the appointment booking task for a procedure

Add users who can work on the appointment booking task for a procedure to the Procedure scheduler assignment group.

Before you begin

Role required: user_admin or admin

Procedure

1. Navigate to **All > User Administration > Groups**.
2. In the **Name** column of the Groups list, search for **Procedure scheduler**.
3. Click **Procedure scheduler** from the **Name** column.
4. In the Group Members related list, click **Edit**.
5. On the Edit Members form, move the users who would schedule a procedure from the available users in the **Collection** column to the **Group Members List** column.
6. Click **Save**.

Related topics

[Groups](#)

Configure when to send the procedure consent form to a patient

Configure the Pre-Visit Management application to when to send the procedure consent document for review and signature to a patient before the procedure appointment date.

Before you begin

Set the application scope to Pre-Visit Management using the application picker. For more information, see [Application picker](#).

Role required: sn_previsit.admin or admin

About this task

By default, the `Send procedure consent schedule` scheduled job is configured to automatically send the procedure consent document to a patient. The lead time when to send the document is set in the `sn_previsit.procedure_consent_lead_time` property. You can configure this property to specify when to send the procedure consent document to a patient.

Procedure

1. Enter `sys_properties.list` in the navigation filter, and then open the `sn_previsit.procedure_consent_lead_time` property.
2. In the **Value** field, enter a numeric value that indicates the number of days before the procedure appointment date when the procedure consent form is sent to the patient for review or signature.
3. Click **Update**.

Related topics

[Pre-Visit Management properties](#)

Specifying the to-do items for patients in Pre-Visit Management

Add a to-do item that patients must complete as part of their pre-visit planning.

With the Pre-Visit Management application, patients can complete the privacy consent, procedure consent, and review their insurance information from the to-do list of their patient portal. By default, the to-do items for patients are configured in the `sn_hcls.to.do.tasks.list` property.

As a user with the admin role, you can configure the `sn_hcls.to.do.tasks.list` property to add task tables as to-do items for patients. The property is available with the Healthcare and Life Sciences Service Management Core application. For more information, see [Specify a to-do item for patients](#).

Configuring the auto-generation of documents for procedure requests

You can define the conditions for auto-generating documents for a procedure request.

By default, privacy consent and procedure consent documents are automatically generated for procedure requests with the Pre-Visit Management workflow. However, you can create pre-filled and reusable document templates based on your workflow requirements. For more information, see [Configuring document templates for Healthcare and Life Sciences Service Management Core](#).

The privacy consent document is automatically triggered for the procedure request cases. The **Select privacy consent** decision rule generates the privacy consent document when the procedure request review task is set to **Complete** by a patient service representative in the playbook for Pre-Visit Management.

As a user with the admin rule, you can configure decision tables in the Healthcare and Life Sciences Service Management Core application by navigating to **All > HCLS Service Management > Administration > Document decisions**. For more information, see [Configuring the auto-generation of documents for healthcare cases](#).

The procedure consent document is sent to patients using the **Send procedure consent schedule** scheduled job. By default, the scheduler sends the procedure consent document to patients three days prior to procedure appointment booking date. As a user with the `sn_previsit.admin` role, you can configure the **Send procedure consent schedule** scheduled job to change the schedule. For more information, see [Configure when to send the procedure consent form to a patient](#).

Configuring the patient portal to add a to-dos menu item for procedure request tasks

Enable the to-dos menu item that uses the HCLS to dos (hcls-todo-list) widget for displaying to-do items on a patient portal.

By default, the HCLS to dos (hcls-todo-list) widget is included in the hcls_todos page provided with the Healthcare and Life Sciences Service Management Core application. The hcls_todos page is pre-configured to display to-do items for patients. You can add a menu item to the header menu of the patient portal to access the hcls_todos page. For more information, see [Configure the service portal to add a to-dos menu item for completing healthcare-related tasks](#).

Configuring playbooks for Pre-Visit Management

Configure a playbook to provide step-by-step guidance for resolving procedure request cases.

As a user with the admin role, you can create a playbook by using Playbooks, a Now Platform® feature. For more information, see [Process Automation Designer](#).

The playbooks in the Pre-Visit Management application use the CSM Configurable Workspace playbook experience. By default, the Pre-Visit Management application includes a playbook for assisting patient service representatives to resolve procedure request cases.

Configure a playbook by navigating to **All > Process Automation > Process Automation Designer**. You can either select an existing process definition or create a new process definition for the playbook associated with procedure request cases. For more information, see [Process definitions](#).

Note: When configuring a process definition for the playbook associated with procedure request cases, ensure that the application scope is set to Pre-Visit Management or Healthcare and Life Sciences Service Management Core by using the application picker. For more information, see [Application picker](#).

Configuring the Pre-Visit Management email notifications

Configure the Pre-Visit Management email notifications sent to patients about pre-visit activities for procedure requests.

Pre-Visit Management includes the following email notifications.

Pre-Visit Management email notifications

| Notification | Condition | Recipient |
|----------------------------|--|-----------|
| Patient to dos | A procedure request case was reviewed by a patient service representative. | Patient |
| Patient todos - assigned | A document task was created for the patient. | Patient |
| Patient appointment booked | An appointment for the procedure is booked for the patient. | Patient |

As a user with the sn_previsit.admin role, you can configure the email notifications for the Pre-Visit Management application, by navigating to **All > System Notification > Email > Notifications**. For more information on editing email notifications, see [Create an email notification](#).

Determining additional user profiles in Pre-Visit Management

You can determine who can act as an agent connector or contributor for procedure request cases in the Pre-Visit Management application.

As a user with the admin role, you can create contributor and agent connector profiles with the desired level of access to procedure request cases, case tasks, and other case-related information.

The sn_previsit.contributor and sn_previsit.agent_connector roles installed with the Pre-Visit Management application provide the following user profiles:

- Agent connector
- Contributor

Agent connector

An agent connector within the Pre-Visit Management application acts as a fulfills who can create, update, and close procedure request cases and tasks.

As a user with the admin role, you can determine who can act as an agent connector for the procedure request cases by assigning the sn_previsit.agent_connector role and other agent-specific roles to a group, and then assigning the group to the user with the agent connector profile. To assign roles to a group, see [Assign a role to a group](#).

The following table describes the location agent profile within the Pre-Visit Management application scope that you can refer to as an example for combining the sn_previsit.agent_connector role with the [industry data model roles](#) in the CSM application.

Example agent connector profile for Pre-Visit Management

| Profile | Description | Assigned roles |
|----------------|---|--|
| Location agent | <p>Creates and fulfills procedure request cases in the agent's business location.</p> <p>Note: To create procedure request cases for a service organization (business location), a user with the location agent profile must be a member of the service organization and assigned the Location Consumer Agent responsibility type. The mapping of a service organization and its members is included in the Service Organization Member [sn_csm_service_organization_member] table.</p> | sn_previsit.agent_connector and sn_customerservice.svc_location_consumer_agent |

Contributor

A contributor within the Pre-Visit Management application acts as a requester who can create and read procedure request cases.

As a user with the admin role, you can determine who can act as a contributor to the procedure request cases by assigning the sn_previsit.contributor role and other contributor

roles to a group, and then assigning the group to the user with the contributor profile. To assign roles to a group, see [Assign a role to a group](#).

The following table describes different contributor profiles within the Pre-Visit Management application scope that you can refer to as an example for combining the sn_previsit.contributor role with the [contributor roles](#) in the CSM application.

Example contributor profiles for Pre-Visit Management

| Profile | Description | Assigned roles |
|--------------------------|---|--|
| Relationship contributor | <p>Creates procedure request cases for only those patients with whom a relationship is established. For more information, see Create relationships.</p> <p>Note: To create procedure requests for a patient, a user with the relationship contributor profile must have a relationship with the patient included in the Consumer Team Member [sn_customer_rel_consumer_to_user_list] table and the Relationship Manager responsibility type.</p> | sn_previsit.contributor and sn_customerservice.relationship_contributor |
| Patient contributor | Creates procedure request cases for any patients. | sn_previsit.contributor and sn_customerservice.consumer_contributor |
| Location contributor | <p>Creates procedure request cases for any patients in a particular service organization (business location) with which the user is associated as a service organization member.</p> <p>Note: To create procedure request cases for a service organization (business location), a user with the location contributor profile must be a member of the service organization and assigned the Location Contributor responsibility type. The mapping of a service organization and its members is included in the Service Organization Member [sn_csm_service_organization_member] table.</p> | sn_previsit.contributor, sn_customerservice.service_organization_contributor and sn_customerservice.consumer_contributor |

Setting up the process to create procedure request cases as a contributor

Set up the process for users with the contributor profile to create procedure request cases on a service portal.

If the CSM Contributor User plugin (com.snc.csm_contributor_user) is installed in addition to the Pre-Visit Management application, the *Create a procedure request case* record producer is available from the Case menu on the Consumer Service Portal page to create procedure request cases. To enable users with the [contributor roles in CSM](#) for creating procedure request cases, you can use the default record producer or create your own record producer.

As an administrator, you can include the record producer for creating procedure request cases in a service# catalog and display the service# catalog# as a module on the Consumer Service Portal page. Users with the contributor profile can then use the module to create procedure request cases.

For more information, see [Record Producer](#) and [Set up a service catalog](#).

Creating procedure request cases as a contributor

Create procedure request cases for your patients from a service portal as a user with the contributor profile.

Your administrator can configure the option for creating procedure request cases. By default, the option is available from the Case menu on the Consumer Service Portal page. If you have the [contributor role in CSM](#), you can use the option to create procedure request cases from your Consumer Service Portal.

Managing procedure requests in Workspace

As a patient service representative, you can use Workspace to manage and schedule procedure requests.

Procedure request workspace managing tasks

| Task | Description |
|--|--|
| Access the Workspace . | Use the home page in Workspace for procedure requests to quickly scan and access procedure request cases. |
| View a procedure request case in Workspace . | View a procedure request case in Workspace to complete patient pre-visit activities for a procedure. |
| View patient information for a procedure request case in Workspace . | View the details of a patient in Workspace. |
| Work on a procedure request case in Workspace . | Use the playbook available with the Pre-Visit Management application to manage procedure request cases and schedule a high value procedure for patients. |
| Manage appointment bookings . | Manage appointments for a procedure request in the Pre-Visit Management application. |

Viewing the landing page for procedure request cases in Workspace

As a patient service representative, you can use the landing page of the Workspace to quickly scan and access procedure request cases.

The landing page of the Workspace provides an overview of procedure request cases assigned to you and your groups.

Role required

Patient service representatives must have the sn_previsit.patient_service_agent or sn_hcls.manager role to use the Workspace. For more information, see [Assign roles for Pre-Visit Management users](#).

Accessing and using the landing page

To access the Workspace, navigate to **All > Pre-Visit Management > Workspace**.

The Workspace landing page includes components that display procedure request case information, plus visualizations that further breakdown the component data. Each visualization is connected to a data source. For example, the New Cases component includes visualizations for new cases.

As a patient service representative, you can perform the following tasks from the landing page of the Workspace:

- View the case or task information presented in each component.
- Drill into each component to see the case list behind the single score.
- Navigate to individual records from the case lists.

Viewing data

The Workspace landing page for procedure request cases is same as the landing page of Workspace for any healthcare-related cases including cases created for addressing procedure requests. For more information, see [Viewing the landing page for healthcare-related cases in Workspace](#).

Note: Your administrator can customize the landing page for Workspace and change the data that appears on it.

View a procedure request case in Workspace

View a procedure request case in Workspace to complete patient pre-visit activities for a procedure.

Before you begin

You must have access to procedure request cases.

Role required: sn_hcls.manager or sn_previsit.patient_service_agent

Procedure

1. Open your Workspace by navigating to **All > Pre-Visit Management > Workspace**.
2. View procedure request cases assigned to you or your groups.
 - View procedure request cases assigned to you by navigating to **Lists > Procedure request > My Cases**.
 - View all open procedure request cases assigned to you by navigating to **Lists > Procedure request > My Open**.

- View procedure request cases that belong to your groups but have not been assigned to anyone by navigating to **Lists > Procedure request > Unassigned for my groups**.
- View all procedure request cases by navigating to **Lists > Procedure request > All**.

3. Click the link to the case you want to view.

Result

The selected procedure request case page opens in another tab within Workspace displaying the following components:

- Playbook
- Details
- Patient information
- Tasks
- Appointments
- Pre-authorization requests
- Emails
- Task SLAs

A procedure request case is based on a healthcare case that instead is based on a customer service case. Depending on the configurations made by your administrator and your role, additional tabs similar to a customer service case might appear for the procedure request case.

i Note: The **Patient** field is mandatory for a procedure request case.

For more information on tabs available for a customer service case, see [Customer service case form](#) ↗.

What to do next

You can select the **Patient information** tab in Workspace to view patient details. For more information, see [Viewing patient information for a procedure request in Workspace](#).

Viewing patient information for a procedure request in Workspace

With the 360-degree view of a patient in Workspace, you can access the patient details anytime for completing procedure request cases.

The **Patient information** tab in Workspace provides several details about a patient enabling 360-degree view of the patient. The tab is displayed on the Workspace for procedure request cases.

i Note: Your administrator can configure the Workspace to modify the patient information by using UI Builder. This topic discusses the default view for the patient information. For information about UI Builder, see [UI Builder](#) ↗.

Patient information

Patient information - Gilly Parker

Record Information

- Overview**
 - Patient: Gilly Parker
 - Patient ID or MRN: MR12345
 - Date of birth: 1979-04-09
 - Mobile phone: 111-22-5554
 - Primary email: gilly.parker402@example.com
- Timeline**: Shows a timeline from Now back to 2020.
- Active SLA**: There is no SLA defined.

Patient information displayed for a procedure request case

| Details | Description |
|-------------------|--|
| Personal details | Personal details of the patient including the name, date of birth, social security number (SSN), home phone number, email ID, and home address. |
| Insurance details | Insurance details of the patient including the member number, effective from date, RxBin number, RxGroup number, group number, effective to date, RxPCN number, and subscriber name. |
| Household members | Members of the household associated with the patient. Click the member name or responsibility to view the household member relationship details with the patient. |
| Conditions | Number of health conditions observed in the patient. Click the number to view a list of conditions associated with the patient. |
| Medications | Number of medications taken by the patient. Click the number to view a list of medications associated with the patient. |
| Allergies | Number of allergies observed in the patient. |

Patient information displayed for a procedure request case (continued)

| Details | Description |
|---------------------|---|
| | Click the number to view a list of allergies associated with the patient. |
| Immunizations | Number of vaccines administered for the patient. Click the number to view a list of immunizations associated with the patient. |
| Cases overview | Donut chart displaying procedure request cases associated with the patient by status. Click a status slice to view a list of cases in that status. |
| Claims overview | Donut chart displaying claims associated with the patient by status. Click a status slice to view a list of claims in that status. |
| Recent interactions | List of interactions that have been created for the patient. Click an interaction number to view more details about the interaction. |
| Appointments | List of appointments scheduled for the patient. Click an appointment number to view more details about the appointment. |
| Record Information | Contextual side panel used for viewing an overview of a patient record, the case timeline, and any SLA associated with the case. |
| Agent assist | Contextual side panel used for searching for cases. By default, the available search sources include procedure request cases. |

Working on a procedure request case in Workspace

Use the playbook available with the Pre-Visit Management application to manage procedure request cases and schedule a high value procedure for patients.

The playbook experience provides fulfillers with visibility into cross-business workflows and the actionable activities used to complete these workflows. When the playbook experience is activated with Workspace in Pre-Visit Management, the **Playbook** tab appears for a procedure request case. For more information on how to interact with a playbook, see [Interact with Playbook](#).

As a patient service representative with the sn_previsit.patient_service_agent role assigned to you, you can use the playbook to complete all pre-visit activities for a patient. You can access the **Playbook** tab on your Workspace when a procedure request case is assigned to you. The Pre-Visit Management workflow populates the case data for all launched activities on the **Playbook** tab. You can select a stage in the playbook to complete the activities associated with the stage.

By default, the following stages are available to you as a patient service representative with the sn_previsit.patient_service_agent role on the **Playbook** tab of the Procedure request workspace.

Pre-Visit Management playbook stages

| Stage | Description |
|--------------------|--|
| Intake | Complete the initial procedure order review activities. |
| Pre-authorizations | Capture pre-authorization details for follow-up and audit purposes. |
| Schedule procedure | Review appointments created for the procedure. |
| Resolve and close | Wait until all child activities are completed so that the procedure request is automatically closed. |

Note: Before the appointment date, the Pre-Visit Management workflow automatically assigns the to-do item to the patient for reviewing and signing the procedure consent, and also sends an email notification about the to-do item to the patient. The day when to send the procedure consent form is configured by your administrator. For more information, see [Configure when to send the procedure consent form to a patient](#).

Completing the initial review activities

In the **Intake** stage of the playbook, complete the following activities:

- Review order:** Review a procedure request order for a patient. When the review order activity is set to complete, the Pre-Visit Management workflow automatically assigns to-dos to the patient and sends an email notification about to-do items to the patient.
- Patient To-dos:** Check the status of to-dos items for a procedure request assigned to the patient. By default, the to-do items configured for the patients are to review their insurance information and sign the privacy consent form.
- Review Insurance:** Capture or review the insurance information of the patient.

As a patient service representative, you can contact the patient directly to verify the insurance payment information. You can enter or review the insurance payment information from the **Review Insurance** activity of the playbook for Pre-Visit Management in your Workspace and mark the activity as complete when done. The Verify payment information form also includes the procedure payment type detail. Pre-authorization is only required with the insurance payment type. If the self-pay payment type is selected, the **Pre-authorizations** stage is automatically removed from the Pre-Visit Management playbook.

Note: A patient can also access the to-do list from their patient portal and complete the insurance information verification activity. After the patient completes the to-do item for the insurance payment information, the **Review Insurance** activity is automatically set to **Pending review**. As a patient service representative, you can then mark the **Review Insurance** activity as complete in the playbook.

- 4. Review patient consent:** Check the status of completion of the patient consent form assigned to the patient. After the patient completes the to-do item for the consent form, the consent is listed in the activity. As a patient service representative, you can then review the consent and mark the **Review patient consent** activity to complete in the playbook.

Completing the pre-authorization activities

In the **Pre-authorizations** stage of the playbook, complete the following activities:

- 1. Create pre-authorization:** Enter the pre-authorization reference number as provided by the insurance company.
- 2. Review pre-authorization:** Capture the pre-authorization final status, approval or denial reasons, and other details for audit purposes.

Reviewing appointments for procedures

In the **Schedule procedure** stage, complete the **Review appointments** activity.

Only after the booked appointment details are entered by using the **Create appointment** UI action, the patient service representative can review the appointment details and mark the **Review appointments** activity of the **Schedule procedure** stage as complete in the Pre-Visit Management playbook. For more information, see [Managing appointment bookings for procedure requests](#).

- Note:** After the **Schedule procedure** stage is completed, the **Resolve and Close** stage is automatically run.

Closing the procedure request

The **Resolve and Close** stage is automatically closed when all the child activities associated with a procedure request case are completed.

Managing appointment bookings for procedure requests

Manage appointments in the Pre-Visit Management application to confirm and schedule a procedure for a patient.

After a procedure request order is reviewed by a patient service representative in the Pre-Visit Management playbook, the Pre-Visit Management workflow triggers an appointment booking task for a procedure scheduler agent. A procedure scheduler agent is a user with the sn_previsit.patient_service_agent role and added to the Procedure scheduler assignment group.

As a procedure scheduler agent, you perform the following tasks:

1. Ensure that an appointment is booked for the procedure either by working directly with the patient or gathering the booked appointment details; for example, from a third-party scheduling system or an EMR system.
2. Record the booked appointment details in your ServiceNow instance by using the **Create appointment** UI action available within the Pre-Visit Management application. For more information, see [Book an appointment for a procedure request](#).

- Note:** Only after the booked appointment details are entered by using the **Create appointment** UI action, the patient service representative can review the appointment details and mark the **Review appointments** activity of the **Schedule procedure** stage as complete in the Pre-Visit Management playbook. For more information, see [Working on a procedure request case in Workspace](#).

Book an appointment for a procedure request

Book an appointment for a procedure request in the Workspace.

Before you begin

Determine who can work on the appointment booking task for a procedure.

Role required: sn_previsit.patient_service_agent added to the Procedure scheduler assignment group

Procedure

1. Open your Workspace by navigating to **All > Pre-Visit Management > Workspace**.
2. Navigate to **Lists > Book appointment tasks > My tasks**.
3. In the **Number** column of the My tasks list, click the link to the task number for which you want to book an appointment.
4. Optional: Review the appointment booking request details on the **Details** tab.
5. Click **Create appointment**.
6. Fill in the details for the new appointment.
You can discuss the appointment schedule with the patient beforehand to fill in the details of the appointment.
7. Optional: Add an attachment related to the appointment by clicking **Browse** in the Attachments panel.
8. Click **Save**.

Result

The appointment record is created and the appointment information is updated for the associated case in the **Schedule procedure** activity of the Pre-Visit Management playbook. A patient service representative can then review the appointment and mark the **Review appointments** task as complete. For more information, see [Working on a procedure request case in Workspace](#).

Completing to-do items from the patient portal

View and complete all to-do items assigned to you as a patient from the patient portal.

The to-dos page is where you as a patient can view and complete all your to-dos on a single page on the patient portal. By default, the following to-do items are assigned for procedure requests:

- Review the insurance information
- Review and sign the privacy consent form
- Review and sign the procedure consent form

For each of the to-do item, you receive an email notification containing the item information and the link to the patient portal. You can access the to-dos page and complete your to-do items.

Note: Your administrator can configure the to-dos page to add more to-do items.

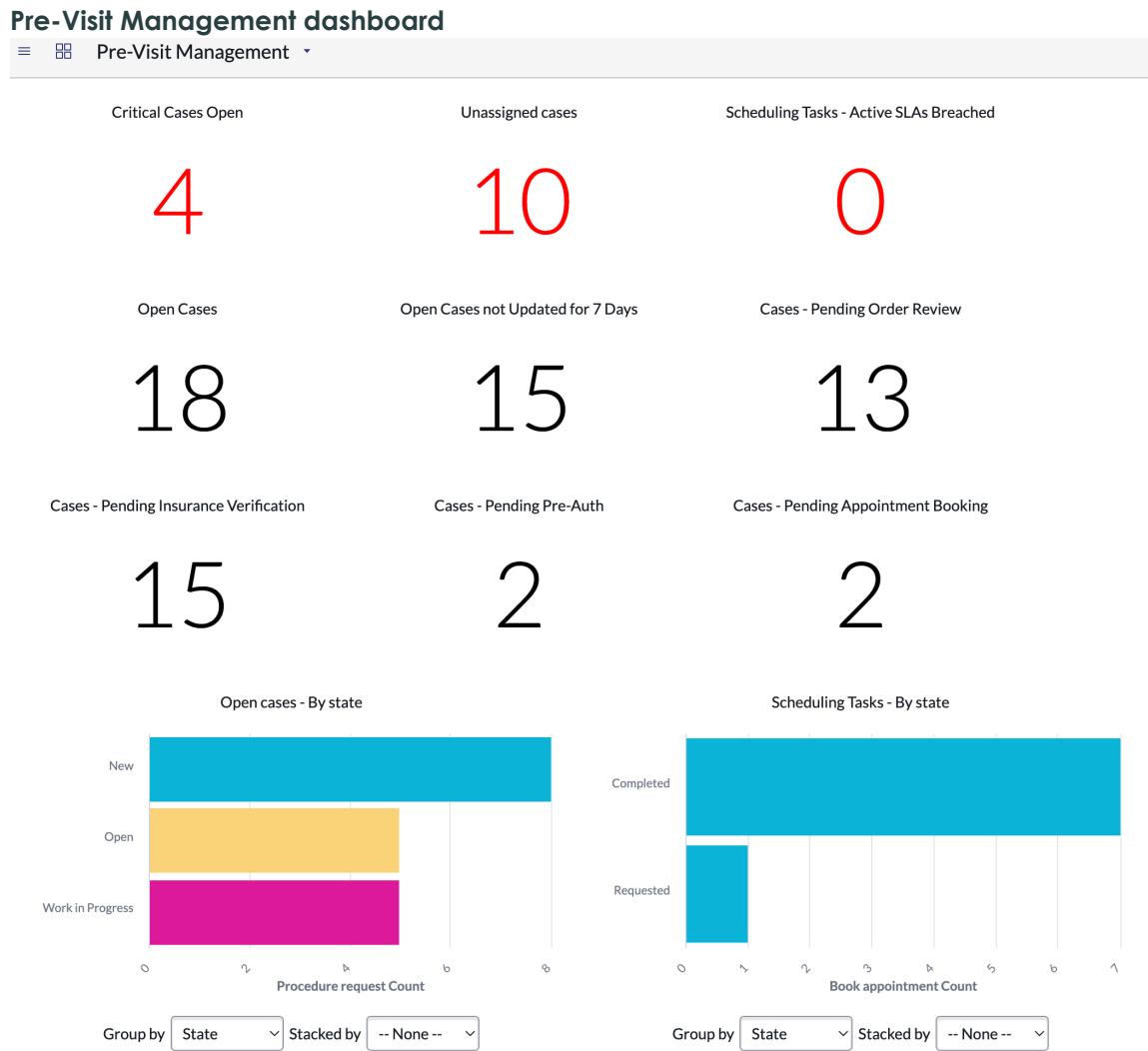
Analytics and reporting for Pre-Visit Management

Pre-Visit Management contains a preconfigured dashboard with actionable data visualizations that help you improve your business processes and quantify the value of self-service.

The [Pre-Visit Management dashboard](#) is available in the Pre-Visit Management application.

Pre-Visit Management dashboard

Monitor the status of open procedure request cases to streamline patient pre-visit activities for a procedure.



Access the Pre-Visit Management dashboard

To open the dashboard, navigate to [Pre-Visit Management > Dashboard](#).

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Use case of Pre-Visit Management dashboard

| User | Dashboard use |
|--|---|
| sn_previsit.patient_service_agent sn_hcls_manager | Monitors procedure request cases and measures the performance to stay on top of the backlog to provide a streamlined experience for patients. |

Reports

Pre-Visit Management reports

| Title | Type | Source table | Description |
|---|---|---|--|
| Critical Cases Open | Single Score  | Procedure request [sn_previsit_procedure_request] | Count of priority 1 procedure request cases that are still open. |
| Unassigned cases | Single Score  | Procedure request [sn_previsit_procedure_request] | Count of procedure request cases not assigned to patient service representatives. |
| Scheduling Tasks - Active SLAs Breached | Single Score  | Task SLA [task_sla] | Count of appointment booking tasks that breached the service level agreement (SLA) of your business. |
| Open Cases | Single Score  | Procedure request [sn_previsit_procedure_request] | Count of procedure request cases that are still open. |
| Cases - Pending Order Review | Single Score  | Procedure request [sn_previsit_procedure_request] | Count of procedure request cases pending order reviews. |
| Cases - Pending Insurance Verification | Single Score  | Procedure request [sn_previsit_procedure_request] | Count of procedure request cases pending insurance verification. |

Pre-Visit Management reports (continued)

| Title | Type | Source table | Description |
|-------------------------------------|---|---|--|
| Open Cases not Updated for 7 Days | Single Score  | Procedure request [sn_previsit_procedure] | Count of procedure request cases not updated for the last seven days. |
| Cases - Pending Appointment Booking | Single Score  | Procedure request [sn_previsit_procedure] | Count of procedure request cases awaiting appointment booking. |
| Cases - Pending Pre-Auth | Single Score  | Procedure request [sn_previsit_procedure] | Count of procedure request cases awaiting pre-authorization. |
| Open cases - By state | Horizontal Bar  | Procedure request [sn_previsit_procedure] | Status of procedure request cases that are still open categorized by their state as Closed , Complete , Closed Incomplete , New , Open , or Work in Progress . |
| Scheduling Tasks - By state | Horizontal Bar  | Book appointment [sn_hcls_book_appt_task] | Status of scheduling tasks for appointment booking categorized by their state as Canceled , Completed , or Requested . |

Pre-Visit Management reference

Reference topics provide additional information about Pre-Visit Management components.

Components installed with Pre-Visit Management

Several types of components are installed with installation of the Pre-Visit Management application, including tables, user roles, ServiceNow Store applications, scheduled jobs, and business rules.

Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see [Find components installed with an application](#) .

Demo data is available for this feature.

Roles installed

Roles installed with Pre-Visit Management

| Role | Description | Contains roles |
|-----------------------------------|--|--|
| sn_previsit.admin | Administers who can access the Pre-Visit Management application. | sn_previsit.patient_service_agent |
| sn_previsit.patient_service_agent | Views and fulfills procedure request cases as a patient service representative. | sn_hcls.healthcare_agent |
| sn_previsit.case_creator | Creates procedure request cases for all associated objects. | sn_previsit.case_viewer |
| sn_previsit.agent_connector | <p>Views, creates, and updates procedure request cases for all associated objects.</p> <p>You can combine this role with other roles for a user with the agent connector profile. For more information, see Determining additional user profiles</p> | <ul style="list-style-type: none"> • sn_hcls.healthcare_agent • sn_previsit.sm_agent |

Roles installed with Pre-Visit Management (continued)

| Role | Description | Contains roles |
|-------------------------|--|---|
| | in Pre-Visit Management. | |
| sn_previsit.case_viewer | Views all procedure request cases available in the application. | None |
| sn_previsit.contributor | <p>Creates procedure request cases for patients.</p> <p>You can combine this role with other roles for a user with the contributor profile.</p> <p>For more information, see Determining additional user profiles in Pre-Visit Management.</p> | <ul style="list-style-type: none"> • sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewer • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_viewer • sn_hcls.health_insurance_data_viewer • sn_previsit.case_viewer • sn_hcls.revenue_cycle_data_viewer • sn_previsit.case_creator |
| sn_previsit.sm_agent | Accesses and views all data related to procedure requests as a patient service representative. | sn_previsit.case_creator |

Tables installed

Tables installed with Pre-Visit Management

| Table | Description |
|--|---|
| Procedure request [sn_previsit_procedure_request] | Stores procedure request cases. Extends the Healthcare case [sn_hcls_case] table. |

ServiceNow Store applications installed

ServiceNow Store applications installed with Pre-Visit Management

| Application | Description |
|--|--|
| Healthcare and Life Sciences Service Management Core (sn_hcls) | Provides a data model and critical digital health capabilities including patient 360-degree view, consent management, and digital documentation to better address healthcare services. |

Scheduled jobs installed

Scheduled jobs installed with Pre-Visit Management

| Scheduled job | Description |
|---------------------------------|---|
| Send procedure consent schedule | Sends procedure consent document before the procedure appointment date. |

Business rules installed

Business rules installed with Pre-Visit Management

| Business rule | Table | Rule criteria | Description |
|---|---|-------------------------|--|
| Create book appointment task | Procedure request [sn_previsit_procedure_request] | After update | Creates an appointment task for the scheduling group when a patient opts for insurance and an agent completes the review of patient insurance. |
| Create insurance info task | Procedure request [sn_previsit_procedure_request] | After update | Creates an insurance task for the patient when the patient service representative completes the review of a procedure request case. |
| Update appt booked on procedure request | Book appointment [sn_hcls_book_appt_task] | After insert and update | Indicates that an appointment is booked for a procedure request when the appointment task moves to the terminal state. |
| Patient access to | Procedure request [sn_previsit_procedure_request] | Before query | Enables patients to view their procedure request cases. |

Business rules installed with Pre-Visit Management (continued)

| Business rule | Table | Rule criteria | Description |
|-------------------|-------|---------------|-------------|
| procedure request | | | |

Pre-Visit Management properties

There are several advanced Pre-Visit Management properties that you can configure to schedule a pre-visit procedure for a patient.

These properties are available for Pre-Visit Management.

Note: To open the System Properties [sys_properties] table, enter sys_properties.list in the navigation filter.

Properties for Pre-Visit Management

| Property | Description |
|--|--|
| Number of days before the procedure appointment date when the procedure consent form is sent to the patient for review or signature sn_previsit.procedure_consent_lead_time | <p>Set to numeric value to indicating the number of days before the procedure appointment date when the procedure consent form is sent to the patient for review or signature.</p> <ul style="list-style-type: none"> Type: Integer Default value: 3 Location: System Property [sys_properties] table Learn more: Configure when to send the procedure consent form to a patient |

Domain separation and Pre-Visit Management

Domain separation is supported for Pre-Visit Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see [Application support for domain separation](#).

Overview

The Pre-Visit Management application includes domain separation for transactional data like procedure request cases. The application is based on the [Healthcare and Life Sciences data model](#) that also includes domain separation.

How domain separation works in Pre-Visit Management

For customers using the Pre-Visit Management application to raise procedure requests, the domain is set from the logged-in user's session, in the case created, and the associated healthcare data.

Use cases

When healthcare providers have their healthcare data separated by domains, the healthcare requests and corresponding fulfillment tasks are associated with the respective customer domains.

Vaccine Administration Management

The ServiceNow® Vaccine Administration Management application provides a workflow for users, healthcare providers, and clinicians to manage vaccinations for infectious diseases, such as COVID-19, from start to finish.

The Vaccine Administration Management application accelerates the immunization process by delivering predefined content to manage vaccinations.

Portal for users

Users can learn more about vaccines and schedule vaccinations through a self-service portal that is accessible from mobile devices or web browsers.

- Self-register and sign up for vaccinations.
- Ask the ServiceNow® Virtual Agent for help.
- Read Knowledge content about infectious diseases, such as COVID-19.
- Answer a pre-vaccine questionnaire to determine vaccine eligibility.
- Schedule appointments by day and time. Users can also reschedule and cancel appointments.
- View previous and upcoming appointments.
- View vaccination history and suggested vaccines that users are eligible for.
- Receive a QR code for vaccine appointments.
- Receive notifications about appointments.

Healthcare provider administration

Requests for vaccinations initiate vaccination tasks so that provider administrators can track the vaccination process to completion.

Use additional Vaccine Administration Management features to prepare users, healthcare providers, and clinicians for requesting and administering vaccinations during pandemics and emergencies like COVID-19.

- Maintain up-to-date information about vaccines, such as models, programs, and availability.
- Manage lists of vaccination centers for use in administering vaccinations and programs.
- Manage the self-service portal that users can use to request vaccinations.
- Provide base system Knowledge content or create articles that users can access to learn more about vaccines.
- Provide base system Virtual Agent conversations so that users can get help.
- Request vaccinations for individual users or mass-schedule appointments.
- Configure location-specific and inventory-based appointment scheduling.

Clinician appointment management

Clinicians can scan a QR code to quickly find the vaccination task and administer the vaccination.

Clinicians can create, read, and update vaccination requests, vaccination tasks, and vaccination questionnaires. A clinician can verify a user's eligibility prior to administering and recording the vaccination. Clinicians can consume inventory after the vaccine is administered.

When scheduling issues or problems arise, clinicians can cancel appointments. If the user doesn't show up to a scheduled appointment, clinicians can mark the appointment as a no-show.

Additional information

- Vaccine Administration Management requires instances that are upgraded to Rome. For earlier versions of Vaccine Administration Management supported on previous instances, see Vaccine Administration Management in the Rome documentation.
- To learn more about localization and how to activate a language, see [System localization](#) and [Activate a language ↗](#).
- Both the vaccine and clinician portals are compatible with WCAG 2.1.

Notice regarding use by organizations

All decisions in connection with the implementation of this application are at the sole decision of the Organization utilizing this application. Organizations agree that use of the application is not a representation by ServiceNow regarding the application's compliance with any law or regulation and any suggested language provided out of the box with the application does not constitute legal advice by ServiceNow.

Organizations remain solely responsible for complying with their legal obligations under applicable law, including (but not limited to) data protection and employment laws, and should modify any language within the templates provided to meet the Organizations' specific requirements.

Notice regarding use by government agencies

ServiceNow is offering this application to government agencies and their authorized users, not to government employees in their individual capacities. Use of the application does not modify any existing, or future entitlements or payment obligations for ServiceNow software or applications otherwise purchased by the government agency. ServiceNow shall not be responsible for any implementation or configuration costs associated with use of the application unless separately purchased. Government customers are solely responsible to confirm with the agency's Ethics Office or its authorized representative that acceptance and usage of the application is permissible.

All decisions in connection with the implementation of this application are at the sole decision of the government agency utilizing this application.

Agencies remain solely responsible for complying with their legal obligations under applicable laws and regulations, including (but not limited to) data protection and employment laws and regulations, and should modify any language within the templates provided to meet the agency's specific requirements.

Exploring Vaccine Administration Management

The ServiceNow® Vaccine Administration Management application provides a workflow for users, healthcare providers, and clinicians to manage vaccinations for infectious diseases, such as COVID-19, from start to finish.

The Vaccine Administration Management application accelerates the immunization process by delivering predefined content to manage vaccinations.

Benefits

Vaccine Administration Management provides the following benefits:

Vaccine Administration Management benefits

| Benefit | Key feature | Role |
|--|--|--------------|
| Manage appointment types and time slots available for patients to book online. | Using the Patient Portal to register for a vaccination program | Clinician |
| Users can learn more about vaccines and schedule vaccinations through a self-service portal that is accessible from mobile devices or web browsers. | Using Clinician Portal to find and manage vaccination appointments for users | Patient |
| View vaccine appointments by day, week, and month. View scheduled, completed, and no-show appointments, as well as filter appointments by the vaccine center, date, method, and clinician. | Vaccine Administration Management dashboard | HCLS Manager |

Vaccine Administration Management data model

The Vaccine Administration Management application provides a data model that is used in the vaccine administration workflows.

Overview

The Vaccine Administration Management data model extends the Healthcare and Life Sciences data model.

The Vaccine Administration Management data model uses a combination of tables to store data:

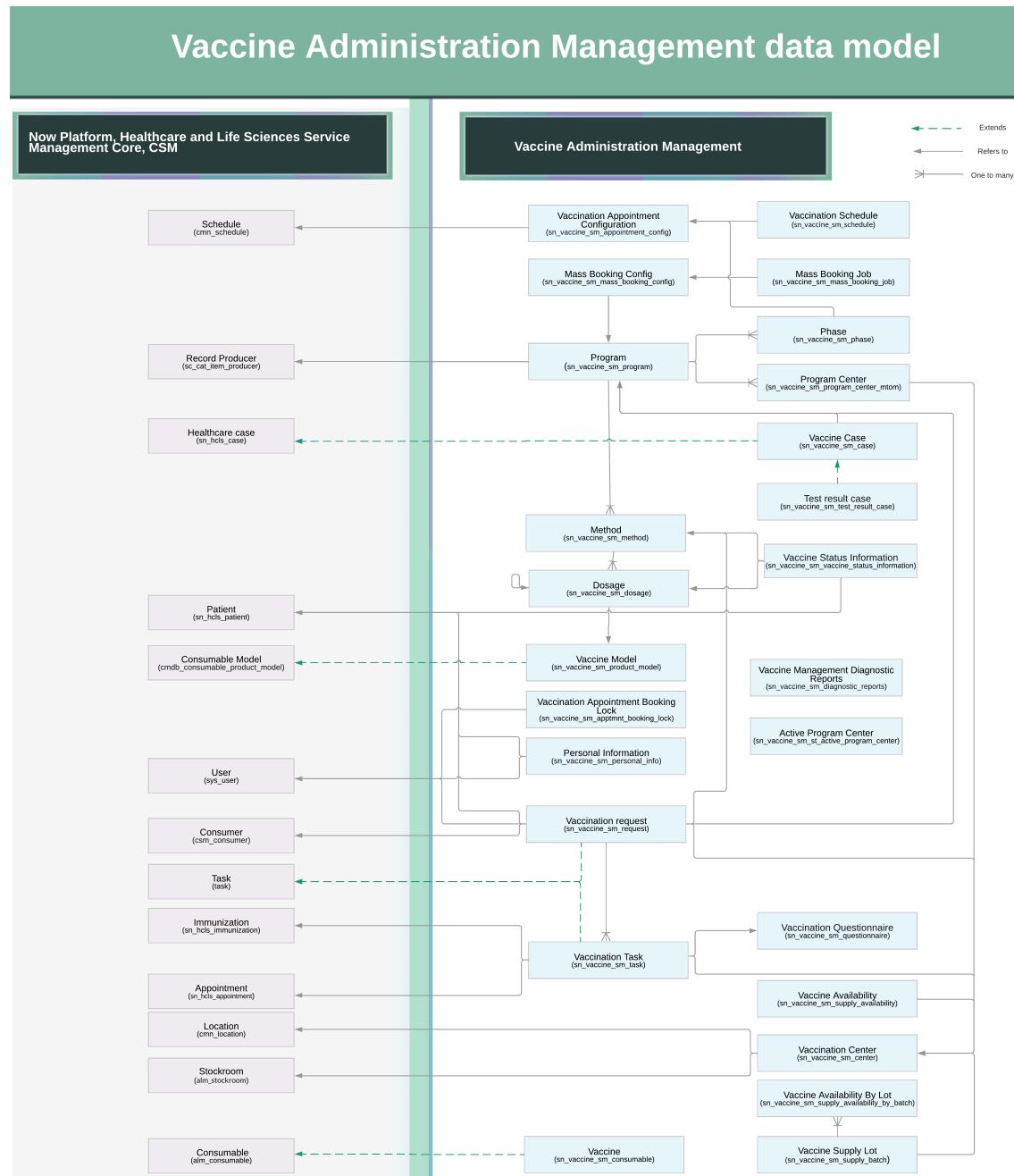
- Tables that are included within the Vaccine Administration Management application.
- Tables that are included within the Healthcare and Life Sciences Service Management Core application.

- Tables that are from the Customer Service Management (CSM) application.
- Tables that are from the Now Platform application.

You can install the Vaccine Administration Management application to use its data model.

The following diagram shows the tables and their relationships that comprise the Vaccine Administration Management data model.

Vaccine Administration Management data model



The Vaccine Administration Management data model uses the following tables included within the Vaccine Administration Management application to store data.

Vaccine Administration Management application tables

| Table | Description |
|---|--|
| Active Program Center [sn_vaccine_sm_st_active_program_center] | Stores the list of vaccination centers that are a part of a vaccine program and still in use. |
| Dosage [sn_vaccine_sm_dosage] | Store the details of vaccine dosages for a vaccination method. |
| Mass Booking Config [sn_vaccine_sm_mass_booking_config] | Stores the list of configurations used to mass schedule vaccinations. |
| Mass Booking Job [sn_vaccine_sm_mass_booking_job] | Stores mass booking job records including total number of booked appointments in the job, total vaccination tasks, and failed bookings when a mass appointment booking request is generated. |
| Method [sn_vaccine_sm_method] | Stores the details of the methods available to vaccinate someone within a vaccination program. |
| Personal information [sn_vaccine_sm_personal_info] | Stores the information captured from the user during the vaccination sign-up process including occupation, demography, address, and identity document. |
| Phase [sn_vaccine_sm_phase] | Stores the stages of a release that a vaccine program is in and when it is available to administer. Includes the start date, end date, and additional eligibility criteria. |
| Program [sn_vaccine_sm_program] | Stores the list of available programs used to administer vaccinations. |
| Program Center [sn_vaccine_sm_program_center_mtom] | Stores the list of vaccination centers that are a part of a vaccine program. |
| Test result case [sn_vaccine_sm_test_result_case] | Stores the details of a test result case including patient name, test date, expiration date, details of a vaccination program, and test result status. |

Vaccine Administration Management application tables (continued)

| Table | Description |
|--|---|
| Vaccination Appointment Booking Lock [sn_vaccine_sm_apptmnt_booking_lock] | Stores the records that act as locks on appointment slots during the appointment booking procedure. The records are automatically deleted and locks are released for a slot when the appointment booking is completed |
| Vaccination Appointment Configuration [sn_vaccine_sm_appointment_config] | Stores configurations used for vaccination appointments. |
| Vaccination Center [sn_vaccine_sm_center] | Stores details on vaccination centers, the vaccination center location, contact information, and the vaccination center stockroom. |
| Vaccination Questionnaire [sn_vaccine_sm_questionnaire] | Stores the responses to a questionnaire sent to users who have booked a vaccination appointment. |
| Vaccination Request [sn_vaccine_sm_request] | Stores all vaccination requests and the associated vaccination task number including who the request is for, the vaccination and program, and status. |
| Vaccination Schedule [sn_vaccine_sm_schedule] | Stores all vaccination schedule details within an appointment. |
| Vaccination Task [sn_vaccine_sm_task] | Stores all vaccination tasks included in vaccination requests. |
| Vaccine [sn_vaccine_sm_consumable] | Stores the details on vaccine stock including information about the model, quantity, and availability. |
| Vaccine Availability [sn_vaccine_sm_supply_availability] | Stores the details on the availability of a vaccine including the center and date that the vaccine is available from, vaccine model, and allocated, booked, used, and wasted doses. |
| Vaccine Availability By Lot [sn_vaccine_sm_supply_availability_by_batch] | Stores the details about the supply lot associated with the vaccine availability |

Vaccine Administration Management application tables (continued)

| Table | Description |
|--|---|
| | including the date vaccine is available from and allocated doses. |
| Vaccine case [sn_vaccine_sm_case] | Stores the vaccine cases. |
| Vaccine Management Diagnostic Reports [sn_vaccine_sm_diagnostic_reports] | Stores a list of registered users without any vaccination records. The table is populated when the Vaccination management - Registered users without vaccination requests scheduled job is run. By default, the scheduled job is inactive. |
| Vaccine Model [sn_vaccine_sm_product_model] | Stores the model of the vaccine including type, manufacturer, and model number. |
| Vaccine Status Information [sn_vaccine_sm_vaccine_status_information] | Stores the vaccine status information including status of the vaccine, dosages administered, vaccine method, patient name, and proof key. |
| Vaccine Supply Lot [sn_vaccine_sm_supply_batch] | Stores the details about the lot for a vaccine added to the inventory including type, number of doses, and expiration date. |

The Vaccine Administration Management data model uses the following tables included within the Healthcare and Life Sciences Service Management Core, and Now Platform, Customer Service Management (CSM) applications to store data.

Healthcare and Life Sciences Service Management Core, Now Platform, and CSM tables used in the Vaccine Administration Management data model

| Table | Description | Application |
|----------------------------------|---|--|
| Appointment sn_hcls_appointment] | Provides the appointment booking details for a patient. | Healthcare and Life Sciences Service Management Core |
| Consumable [alm_consumable] | Provides assets associated with a vaccine. | Now Platform |

Healthcare and Life Sciences Service Management Core, Now Platform, and CSM tables used in the Vaccine Administration Management data model (continued)

| Table | Description | Application |
|--|---|--|
| Consumable model [cmdb_consumable_product_model] | Provides descriptions of consumable product models. | Now Platform |
| Consumer [csm_consumer] | Provides patient records associated with consumer records. | CSM |
| Healthcare case [sn_hcls_case] | Supports the healthcare case types including vaccine cases. | Healthcare and Life Sciences Service Management Core |
| Immunization [sn_hcls_immunization] | Provides the information about an event of a patient being administered a vaccine. | Healthcare and Life Sciences Service Management Core |
| Location [cmn_location] | Provides addresses associated with a patient. | Now Platform |
| Patient [sn_hcls_patient] | Provides the details of a patient associated with vaccine records. | Healthcare and Life Sciences Service Management Core |
| Record Producer [sc_cat_item_producer] | Provides the record producers for a vaccination program. | Now Platform |
| Schedule [sn_cmn_schedule] | Provides the holiday schedules in days and times to exclude from the appointment availability for a vaccine schedule. | Now Platform |
| Task [task] | Provides a series of standard task fields used on each of the tables that extend it. | Now Platform |

Healthcare and Life Sciences Service Management Core, Now Platform, and CSM tables used in the Vaccine Administration Management data model (continued)

| Table | Description | Application |
|-----------------|--|--------------|
| User [sys_user] | Provides a series of standard user fields used on each of the tables that extend it. | Now Platform |

To learn about Healthcare and Life Sciences Service Management Core, Now Platform, and CSM tables, see [Healthcare and Life Sciences data model](#), [Industry data model tables](#) , [Tables installed with Model Management](#) , and [Tables installed with Customer Service Management](#) .

Install Vaccine Administration Management

Vaccine Administration Management (VAM) is available on the ServiceNow Store.

Before you begin

Vaccine Administration Management requires the ServiceNow® Healthcare and Life Sciences Service Management application, the Appointment Booking plugin (com.snc.appointment_booking) . The Virtual Agent plugin (com.glide.cs.chatbot) can optionally be installed to enable chatbot conversations in the self-service portal.

If you don't have a Healthcare and Life Sciences Service Management license, contact your ServiceNow account representative. The ServiceNow platform provides support for column-level encryption (CLE) for the tables under the Vaccine Administration Management application. However, it is not activated as part of the initial app installation.

Note:

- Installation of Vaccine Administration Management relies on Healthcare and Life Sciences Service Management Core (com.sn_hcls) as a dependency plugin.
- The customer is responsible for configuring the implementation to meet local compliance rules, regulations, and laws.
- If your instance is already set up to use encryption contexts for column-level encryption, migration is required to use encryption modules. Contact Now Support for assistance with the migration.
- To use Column Level Encryption Enterprise, customers must purchase the Column Level Encryption Enterprise SKU. The customer can install and activate Column Level Encryption Enterprise on a single instance (and not on all account instances) if the customer does not share data contained in the Column Level Encryption Enterprise encrypted fields between instances. To avoid fees for using Column Level Encryption Enterprise, existing ServiceNow customers can use column-level encryption (CLE) that is provided at no additional cost or use a third-party encryption solution.
- For further details on installing CLE with Encryption support for Vaccine Administration Management, see [Installing CLE with Encryption support for VAM \[KB0952557\]](#) .
- Records under the sys_platform_encryption_configuration table are added as part of VAM that encrypts fields which contain sensitive data. These records must be activated to enable encryption on the corresponding fields.

Role required: admin

Procedure

1. Navigate to **System Applications > All Available Applications > All**.
2. Search for Vaccine Administration Management.
3. Click **Install**.

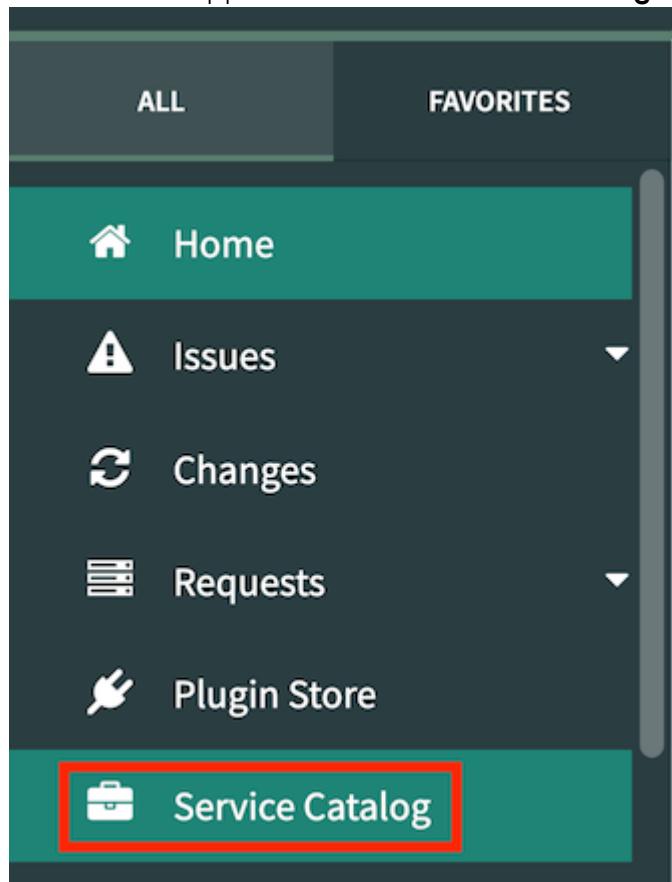
The Application installation dialog box opens.

4. Click **Activate**.

Note: The customer is responsible for configuring the implementation to meet local compliance rules, regulations, and laws, including to address protecting sensitive data on its production and non-production instances. This Vaccine Administration Management app is designed to utilize the CLE and KMF encryption that is enabled by installing the plugin. The customer may determine that it desires to skip this step for its instances that do not contain sensitive data (such as an instance for testing that contains only dummy data).

5. Enable Column Level Encryption Enterprise.

- a. Go to Now Support and choose **Service Catalog** from the menu.



- b. Click **Activate Plugin**.

Activate Plugin

Use this form to request activation of a plugin. ServiceNow administrators can activate the plugins that are listed in Product Documentation.

- c. In the **#What is your target instance** field, specify your instance.
- d. Select **#Plugin I'm looking for is not listed**.
- e. Under **#Specify the name of the plugin**, enter **#Platform Encryption plugin (com.glide.now.platform.encryption)**.
- f. In the **#Reason/Comments** field, state that you need the plugin (com.glide.now.platform.encryption) for **#Vaccine Administration Management**.

Reason/Comments:

We need KMF for Vaccine Administration Management

- g. In the **#Select Maintenance Start Time** field, select a start date and time value.

Select Maintenance Start Time

Select start date and time

- h. Click **Submit**.

The Key Management Framework plugin (com.glide.kmf.global) is now active on your new instances.

- 6. Optional: If you're using the CLE and KMF plugins, generate a key so that fields can be encrypted.

Important: Make sure that the admin has the sn_kmf.cryptographic_manager role to get access to the required tables.

- a. Navigate to **Key Management > Cryptographic Modules > All**.
- b. Click the sn_vaccine_sm.vm_crypto_module crypto module record.
- c. In the Crypto Specifications related list, click the record that appears in the list.

d. Navigate to **Algorithm Definition > Lifecycle Definition > Key Origin > Key Creation**.

The screenshot shows a navigation bar at the top with tabs: Algorithm Definition, Lifecycle Definition, Key Origin, and Key Creation. The Key Creation tab is selected. Below the tabs, there's a horizontal progress bar with four segments corresponding to the tabs. The main area contains several input fields:

- Crypto module: vm_crypto_module
- Key alias: test
- Generate key: [Generate Key](#)
- * Crypto purpose: Symmetric Data Encryption/Decryption
- Origin: Servicenow
- Algorithm: AES 256 CBC

At the bottom left is a "Back" button, and at the bottom right is a refresh icon.

e. Click **Generate Key**.

A key is created in the Module Keys related list on the sn_vaccine_sm.vm_crypto_module crypto module record.

i Note: To view the fields that are encrypted, navigate to **System Security > Field Encryption > Encrypted Field Configurations**.

i Important: Users with the admin role must have elevated roles to access the Field Encryption menu.

You can encrypt additional data fields based on your requirements and configurations. For information about additional encryption capabilities including edge encryption, database encryption, and full disk encryption, see the [Data encryption white paper](#).

Components installed with Vaccine Administration Management

Several types of components are installed with Vaccine Administration Management, including user roles and tables.

i Note: The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see [Find components installed with an application](#).

Roles installed

Roles installed in Vaccine Administration Management

| Role title [name] | Description | Contains roles |
|--|---|--|
| Vaccine Administration Management admin [sn_vaccine_sm.admin] | Application-specific admin for Vaccine Administration Management. | <ul style="list-style-type: none"> • sn_vaccine_sm.clinician • sn_vaccine_sm.manager • sn_apptmnt_booking.appointment_booking_manager |

Roles installed in Vaccine Administration Management (continued)

| Role title [name] | Description | Contains roles |
|--|---|---|
| | <p>Important: By default, the admin role contains the sn_vaccine_sm.admin role. The sn_vaccine_sm.admin role should be reassigned to another user and then removed from the admin role. This process protects sensitive application data by restricting access to the application.</p> | |
| Clinician [sn_vaccine_sm.clinician] | Can create, read, and update vaccination requests, vaccination tasks, and vaccination questionnaires. | <ul style="list-style-type: none"> • sn_vaccine_sm.viewer • agent_workspace_user • sn_apptmnt_booking.appointment_booking_manager • sn_hcls.practitioner |
| Vaccine Administration Management manager [sn_vaccine_sm.manager] | Can create, read, and update vaccination programs, phases, centers, methods, and dosages. | <ul style="list-style-type: none"> • sn_vaccine_sm.viewer • sn_vaccine_sm.model_manager • agent_workspace_user • sn_apptmnt_booking.appointment_booking_admin |
| Vaccine Administration Management model manager [sn_vaccine_sm.model_manager] | Can create, read, and update vaccine models and vaccine consumables. | <ul style="list-style-type: none"> • sn_vaccine_sm.model_viewer |
| Vaccine Administration Management model viewer [sn_vaccine_sm.model_viewer] | Read-only access to vaccine models and vaccine consumables. | None |
| Vaccine Administration Management viewer [sn_vaccine_sm.viewer] | Read-only access to vaccination programs, phases, centers, methods, and dosages. | sn_vaccine_sm.model_viewer |

Roles installed in Vaccine Administration Management (continued)

| Role title [name] | Description | Contains roles |
|--|---|---------------------------------------|
| Vaccine Administration Management self-service portal user [sn_vaccine_sm.user] | Can request a vaccination and manage appointments. | sn_apptmnt_booking.appointment_booker |
| Vaccine Administration Management dashboard manager [sn_vaccine_sm.report_manager] | Can read and edit the appointment dashboard. | sn_vaccine_sm.report_viewer |
| Vaccine Administration Management dashboard viewer [sn_vaccine_sm.report_viewer] | Can read the appointment dashboard. | None |
| Vaccine Administration Management inventory manager [sn_vaccine_sm.inventory_manager] | Can maintain vaccine supply information and distribution. | sn_vaccine_sm.inventory_viewer |
| Vaccine Administration Management inventory viewer [sn_vaccine_sm.inventory_viewer] | Can read the vaccine inventory management tables. | None |

Tables installed

Vaccine Administration Management application tables

| Table | Description |
|---|--|
| Active Program Center [sn_vaccine_sm_st_active_program_center] | Stores the list of vaccination centers that are a part of a vaccine program and still in use. |
| Dosage [sn_vaccine_sm_dosage] | Store the details of vaccine dosages for a vaccination method. |
| Mass Booking Config [sn_vaccine_sm_mass_booking_config] | Stores the list of configurations used to mass schedule vaccinations. |
| Mass Booking Job [sn_vaccine_sm_mass_booking_job] | Stores mass booking job records including total number of booked appointments in the job, total vaccination tasks, and |

Vaccine Administration Management application tables (continued)

| Table | Description |
|---|---|
| | failed bookings when a mass appointment booking request is generated. |
| Method [sn_vaccine_sm_method] | Stores the details of the methods available to vaccinate someone within a vaccination program. |
| Personal information [sn_vaccine_sm_personal_info] | Stores the information captured from the user during the vaccination sign-up process including occupation, demography, address, and identity document. |
| Phase [sn_vaccine_sm_phase] | Stores the stages of a release that a vaccine program is in and when it is available to administer. Includes the start date, end date, and additional eligibility criteria. |
| Program [sn_vaccine_sm_program] | Stores the list of available programs used to administer vaccinations. |
| Program Center [sn_vaccine_sm_program_center_mtom] | Stores the list of vaccination centers that are a part of a vaccine program. |
| Test result case [sn_vaccine_sm_test_result_case] | Stores the details of a test result case including patient name, test date, expiration date, details of a vaccination program, and test result status. |
| Vaccination Appointment Booking Lock [sn_vaccine_sm_apptmnt_booking_lock] | Stores the records that act as locks on appointment slots during the appointment booking procedure. The records are automatically deleted and locks are released for a slot when the appointment booking is completed |
| Vaccination Appointment Configuration [sn_vaccine_sm_appointment_config] | Stores configurations used for vaccination appointments. |
| Vaccination Center [sn_vaccine_sm_center] | Stores details on vaccination centers, the vaccination center location, contact information, and the vaccination center stockroom. |

Vaccine Administration Management application tables (continued)

| Table | Description |
|---|---|
| Vaccination Questionnaire [sn_vaccine_sm_questionnaire] | Stores the responses to a questionnaire sent to users who have booked a vaccination appointment. |
| Vaccination Request [sn_vaccine_sm_request] | Stores all vaccination requests and the associated vaccination task number including who the request is for, the vaccination and program, and status. |
| Vaccination Schedule [sn_vaccine_sm_schedule] | Stores all vaccination schedule details within an appointment. |
| Vaccination Task [sn_vaccine_sm_task] | Stores all vaccination tasks included in vaccination requests. |
| Vaccine [sn_vaccine_sm_consumable] | Stores the details on vaccine stock including information about the model, quantity, and availability. |
| Vaccine Availability [sn_vaccine_sm_supply_availability] | Stores the details on the availability of a vaccine including the center and date that the vaccine is available from, vaccine model, and allocated, booked, used, and wasted doses. |
| Vaccine Availability By Lot [sn_vaccine_sm_supply_availability_by_batch] | Stores the details about the supply lot associated with the vaccine availability including the date vaccine is available from and allocated doses. |
| Vaccine case [sn_vaccine_sm_case] | Stores the vaccine cases. |
| Vaccine Management Diagnostic Reports [sn_vaccine_sm_diagnostic_reports] | Stores a list of registered users without any vaccination records. The table is populated when the Vaccination management - Registered users without vaccination requests scheduled job is run. By default, the scheduled job is inactive. |
| Vaccine Model [sn_vaccine_sm_product_model] | Stores the model of the vaccine including type, manufacturer, and model number. |

Vaccine Administration Management application tables (continued)

| Table | Description |
|--|---|
| Vaccine Status Information [sn_vaccine_sm_vaccine_status_information] | Stores the vaccine status information including status of the vaccine, dosages administered, vaccine method, patient name, and proof key. |
| Vaccine Supply Lot [sn_vaccine_sm_supply_batch] | Stores the details about the lot for a vaccine added to the inventory including type, number of doses, and expiration date. |

Integration with Healthcare and Life Sciences Service Management Core

Vaccine Administration Management is integrated with the ServiceNow® Healthcare and Life Sciences Service Management Core application, enabling capabilities such as synchronization of some records across applications and services, and vaccination history that patient users can view.

Vaccine Administration Management relies on the Healthcare and Life Sciences Service Management Core application to create or link to existing patient, consumer, and immunization records. Integration with Healthcare and Life Sciences Service Management Core uses the following tables:

- Patient [sn_hcls_patient] table-Stores patient details, and links to a user's personal information, user, and consumer records.
- Immunization [sn_hcls_immunization] table-Stores a record of immunization data that an associated user can see as their vaccination history from the vaccine portal.

Integration with Healthcare and Life Sciences Service Management Core also adds the sn_hcls.patient role to the Vaccine Administration Management self-service portal user [sn_vaccine_sm.user] role.

Related topics

[Healthcare and Life Sciences Service Management Core](#)

[Patient table](#)

[Immunization table](#)

Configuring Vaccine Administration Management

Complete all configuration tasks to ensure that Vaccine Administration Management is set up correctly for your organization.

Create vaccine models

Create a vaccine model to track and manage different vaccines under Vaccine Administration Management.

Before you begin

Role required: sn_vaccine_sm.model_manager

About this task

Vaccine Administration Management includes vaccine models for the Moderna COVID-19 vaccine and the Pfizer-BioNTech COVID-19 vaccine. To track and manage any other vaccines, create vaccine models.

Procedure

1. Navigate to **All > Vaccine Administration > Administration > Vaccine Models**, and click **New**.
2. In the **Model categories** field, select **Vaccine**.
3. On the form, fill in the fields.

Model form

| Field | Description |
|-------------------------|---|
| Display name | Name of the model. A system property called <code>glide.cmdb.model.display_name.shorten</code> controls how software model display names are generated. |
| Manufacturer | The company that built the model. |
| Name | The manufacturer-assigned name of the model or abstract name specified by the model manager, such as Field Agent Laptop . |
| Short description | A brief description of the model. |
| Model categories | The categories that the model is assigned to. This field is a Glide list and cannot be used to create reports. |
| Asset tracking strategy | The process by which the model can be tracked. Choose from the following: <ul style="list-style-type: none"> ◦ Leave to Category: The model is transparent and the category defines the asset class. ◦ Create Consumable Asset: The model forces the asset class to be consumable, regardless of what the category defines as the asset class. ◦ Don't create assets: The model blocks asset instantiation, regardless of what the category defines as the asset class. |
| Asset tracking unit | The unit that is used to measure the asset. |
| Acquisition method | The method for purchasing the model. The options are Both , Buy , or Lease . |
| Cost | The cost of a single unit of the model. |

| Field | Description |
|------------------|---|
| Depreciation | The depreciation scheme for the model. |
| Salvage value | The estimated value that an asset realizes on its sale at the end of its useful life. This value must be less than or equal to the cost of the asset. |
| Model number | The model number assigned to the item by the manufacturer. |
| Barcode | The barcode number assigned to the model. Barcodes are assigned by the manufacturer. |
| Owner | The person responsible for the model. |
| Status | The status of the model. The options are In Production , Retired , and Sold . |
| Expenditure type | The type of expenditure. Choose from the following: <ul style="list-style-type: none"> ◦ Capex: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. ◦ Opex: Operational expenditure is an on-going expenditure. For example, toners for the photocopier. |
| Certified | The option that determines whether the model is approved for use. |
| Comments | Information about the model that would be helpful for others to know. |

4. Click **Submit**.

Create vaccine consumable assets

Create a vaccine consumable asset and associate it with a vaccine model.

Before you begin

Role required: sn_vaccine_sm.model_manager

Procedure

1. Navigate to **All > Vaccine Administration > Administration > Vaccines**, and click **New**.
2. In the **Model category** field, select **Vaccine**.
3. In the **Model** field, select the vaccine model that you want to associate the vaccine consumable asset with.
4. On the form, fill in the fields.

Consumable record form

| Field | Description |
|------------------|---|
| Display name | Name of the consumable asset. |
| Model category | Model categories that the model can be associated with. Model categories are used to create configuration items (CIs) and assets. |
| Model | Product model of the asset. |
| Quantity | Amount of items the asset represents. |
| General | |
| State | State of the asset. |
| Parent | Parent asset. When a parent asset is defined, the Assignment and State fields of the child asset are automatically populated based on the Assignment and State fields of the parent asset and are read-only. |
| Class | Type of asset. |
| Expenditure type | Type of expenditure. Choose from the following options: <ul style="list-style-type: none"> ◦ Capex: Capital expenditure is a one-time expenditure, where the value is realized over the years. For example, a photocopier. ◦ Opex: Operational expenditure is an on-going expenditure. For example, toners for the photocopier. |
| Substate | Sub-state of the asset. |
| Assigned to | The user assigned to the record. |
| Location | Location of the asset. |
| Cost | Price that the asset was purchased for. |
| Cost center | Cost center financially responsible for the asset. |
| Disposal | |

| Field | Description |
|----------------------|---|
| Disposal reason | Text explaining why the asset is being retired. |
| Beneficiary | Organization that receives the asset when it is retired. |
| Resale price | Value of the asset when it is retired. For example, if the asset is donated, the value used when reporting taxes. |
| Scheduled retirement | Scheduled date on which the asset is retired. |
| Retired date | Actual date on which the asset was retired. |
| Activities | |
| Work notes | Work notes related to the asset. |

5. Click **Submit**.

Create vaccination programs

Create vaccination programs to track and manage vaccinations.

Before you begin

Role required: sn_vaccine_sm.manager

About this task

To manage flu or Covid-19 vaccinations, use the provided Flu vaccination or Covid-19 Vaccination programs. To manage any other vaccinations, create a program. The flu and Covid-19 Vaccination programs include predefined vaccine methods, but you must add centers and phases to the programs.

Procedure

1. Navigate to **All > Vaccine Administration > Administration > Programs** and click **New**.
2. On the form, fill in the fields.

Program form

| Field | Description |
|-------|----------------------------------|
| Name | Name of the vaccination program. |

| Field | Description |
|--------------|--|
| Catalog item | Vaccine appointment scheduling. |
| Description | Description of the program. |
| Active | Option to activate the program for use. This field is automatically set to Active . |

3. Click **Save**.

4. In the Centers related list, add the locations where the vaccine will be administered.

- To create a new center with a location and a stockroom, click **New**.
- To add existing centers to the program, click **Edit**.

***i* Note:**

If required, you can also remove the existing centers from the program. When you remove an existing center from the program, no more appointments can be booked for that center. However, there will be no changes to the pre-booked appointments.

For each location center, you can specify the appointment schedule configuration, as well as configure the scheduling based on available inventory. For details, see:

- [Configure advanced appointment scheduling for a center](#)
- [Configure inventory-based scheduling for a center](#)

5. In the Phases related list, define the phases for when the vaccine will be administered.

a. Enter a name for the phase.

For example, Phase 1.

b. Select the start and end dates for the phase.

c. Add conditions to the eligibility criteria to define who receives the vaccine during this phase.

For example, Phase 1 could be limited to people in the senior age group.

6. In the Methods related list, add each version of the vaccine that is available through the vaccination program.

a. Click **New**.

b. Enter a name for the vaccine method.

c. In the **Applicable to** field, add filter conditions to define who can receive the vaccine method.

For example, the vaccination may only be suitable for specific age groups, or it may only be provided at specific centers.

d. Click **Save.**

7. In the Dosages related list, create a dosage record for each required dose.

a. Click **New.**

b. On the form, fill in the fields.

Dosage form

| Field | Description |
|----------------------|---|
| Name | The name of the dose. For example, First dose. |
| After | The dose that must be administered before this dose. If this dose is the first dose, don't select a value for this field. |
| Lead time | The minimum number of days that this dose can be administered after receiving the preceding dose. If this dose is the first dose, don't select a value for this field. This field appears only when a value is selected from the After field. |
| Max time | The maximum number of days that this dose can be administered after receiving the preceding dose. If this dose is the first dose, don't select a value for this field. This field appears only when a value is selected from the After field. i Note: Max time should be greater than lead time. |
| Order | The order of the dose. For example, 100 for a first dose and 200 for a second dose. |
| Method | The vaccine method for the dose. This field is automatically set. |
| Vaccine | The vaccine model for the dose. |
| Eligibility Criteria | Configure the eligibility criteria that users must meet to be eligible for a specified dose. For example, a dosage may only be suitable for specific age groups. |

c. Click **Submit.**

Configure the eligibility criteria for a vaccination program

Configure the eligibility criteria that users must meet to be eligible for a vaccination program.

Before you begin

Role required: sn_vaccine_sm.admin

About this task

After users register and provide personal information in the portal, the information is compared with the vaccination program's eligibility criteria to determine whether the users are eligible for the program. If the users are eligible, then the user will be able to proceed to the next stage and schedule the vaccinations. If no eligibility criteria is provided, then all registered users are eligible to schedule vaccinations.

Procedure

1. Navigate to **All > Vaccine Administration Management > Administration > Programs**.
2. Open the vaccination program record that you want to configure the eligibility criteria for.
3. In the **Eligibility Criteria** condition builder, add one or more filter conditions to define the criteria that users must meet to be eligible for the vaccination program.
For example, the following eligibility criteria is defined for users that are above the age of 60 or are a healthcare worker. When users provide their personal information in the portal, the user must meet one of these conditions to be eligible for the vaccination program.
4. Click **Update**.

Configure advanced appointment scheduling for a center

Configure advanced appointment scheduling for a center. Advanced appointment scheduling enables you to configure different vaccination schedules, weekly, daily, and more, and the capacity to meet the changing needs of different location centers and programs.

Before you begin

Navigate to **Vaccine Administration Management > Administration > Properties**, and make sure that the **Enable Vaccine Administration Management location specific Appointment Configuration** property (`sn_vaccine_sm.enable_vam_appointment_config`) is selected.

⚠ Warning: Once you've enabled the property and your advanced appointment scheduling configurations are live, avoid disabling the property to prevent any data inconsistencies.

Role required: sn_vaccine_sm.admin

About this task

Configure advanced appointment scheduling for a center. You can create appointment configurations for use at a specific location or for reuse across multiple location centers and programs.

For each appointment configuration, you can create one or more vaccination schedules to configure the daily start and end time, the days that appointments can be booked, the inclusion of a daily break, and more. Appointment configurations apply for both self-scheduled and mass-booked appointments.

ℹ Important: When you enable this feature, it replaces the default appointment scheduling configuration that is applied across all centers. For further information about the default configuration, see [Configure vaccine appointment scheduling](#).

Procedure

1. Navigate to **Vaccine Administration Management > Administration > Programs**.
2. Open a program record.
3. In the Center related list, click the preview icon () to open the program center record.
4. In the **Appointment configuration** field, click the lookup icon ().
5. Click **New**.
6. On the form, fill in the fields.

Vaccination Appointment Configuration form

| Field | Description |
|---------------------------|--|
| Name | Name of the appointment configuration. |
| Description | Description of the appointment configuration. |
| Holiday schedule | Holiday schedule to associate with the appointment configuration. |
| Appointment duration | Appointment duration for the appointment configuration, which can range from 10 minutes to 8 hours. |
| Lead time | Time after which the first available appointment slot is shown to the user. For example, say that the lead time is four hours. If the current time is 7 AM, then the next available slot that the user would see would be for 11 AM. |
| Future bookable max days | Range of days that the user can view available slots to book their appointment. For example, say that the value is 14 days. When the user is scheduling the appointment, the user sees available slots for the next 14 days. |
| Reschedule/Cancel by time | Time until the user can reschedule or cancel their appointment. For example, say that the value is six hours. If the appointment is scheduled for Monday at 3 PM, then the user must reschedule or cancel the appointment by 9 AM that same day. |

| Field | Description |
|--------|--|
| Active | Option to activate the appointment configuration for use. If enabled, then the appointment configuration applies for both self-scheduled and mass booked appointments. |

7. Right-click the form header and click **Save**.
8. In the Vaccination Schedules related list, create one or more vaccination schedules for the appointment configuration.
 - a. Click **New**.
 - b. On the form, fill in the fields.

Vaccination Schedule form

| Field | Description |
|---------------------------|--|
| Name | Name of the vaccination schedule. |
| Start date | Start date for the schedule. |
| Appointments per window | Number of appointments per window. |
| Daily start time | Daily start time for the schedule. |
| Bookable days | Days that appointments can be booked. |
| Include daily break | Option to include a daily break. If enabled, you can specify the start and end time of the daily break. |
| Appointment configuration | This field is automatically set to the associated appointment configuration record. |
| End date | End date of the schedule. |
| Appointment duration | This field is automatically set to the appointment duration that was set in the associated appointment configuration record. |

| Field | Description |
|-----------------------------|--------------------------------------|
| Daily end time | Daily end time of the schedule. |
| Appointment booking preview | Preview of the vaccination schedule. |

c. Click **Submit**.

d. Repeat the procedure to create vaccination schedules, as needed.

What to do next

Once the configuration is finalized, changing some of the configuration values can have undesired side effects on both existing and future appointment scheduling. For details on how to handle advanced appointment scheduling configurations for a center, see [Guidance for configuring advanced appointment scheduling for a vaccination center](#).

Guidance for configuring advanced appointment scheduling for a vaccination center

Advanced appointment scheduling configuration enables administrators to configure appointment durations, daily schedule, holiday schedule, and so on. This configuration is used to identify the available slots as well as a location's capacity for a given day and enable users to select appointment slots based on the parameters that you configure.

Be mindful that changing some of the configuration values for a finalized vaccination center configuration can have undesired side effects on both existing and future appointments.

The following forms and tables provide some helpful guidance for handling advanced appointment scheduling configurations for a vaccination center and some of the impacts of making certain changes. However, this guidance does not address an exhaustive list of all possible side effects.

Vaccination Appointment Configuration form

The screenshot shows the 'Vaccination Appointment Configuration' form. At the top, there's a header bar with a back arrow, a menu icon, and buttons for 'Update' and 'Delete'. Below the header, the form has several input fields:

- Name:** Location based Appointment Configuration
- Description:** A large text area containing the placeholder text 'U.S. Holidays'.
- Holiday schedule:** U.S. Holidays
- Appointment duration:** 30 mins
- Lead time:** Days: 0, Hours: 04, Minutes: 00
- Future bookable max days:** 60
- Reschedule/Cancel by time:** Days: 00, Hours: 00, Minutes: 00
- Active:** A checked checkbox.

At the bottom of the form are 'Update' and 'Delete' buttons.

Vaccination Appointment Configuration form

| Field | Recommendation and Impact |
|----------------------|---|
| Name | You can change the name field without causing undesired side effects. |
| Description | You can change the description field without causing undesired side effects. |
| Holiday schedule | Do not add a new holiday schedule when there are existing appointments in the current location. It invalidates existing appointments. Do not add more holidays to the existing holiday schedule. New holidays may already contain booked appointments. |
| Appointment duration | <ul style="list-style-type: none"> • Do not modify the appointment duration when appointments have already been created in the current location. • Impact: Changing the total capacity of a location causes overlapping slots that result in overbooked appointments. • For example: <ol style="list-style-type: none"> 1. In your old configuration, if the appointment window was 5 minutes, the daily schedule would have looked like: 9:00 to 9:05, 9:05 to 9:10, 9:10 to 9:15, and 9:15 to 9:20. In this configuration, you have appointments booked from 9:00 to 9:05 and from 9:05 to 9:10, and appointments available from 9:10 to 9:15 and from 9:15 to 9:20. 2. If you create a new configuration with an appointment window of 10 minutes, then your daily schedule would look like: 9 to 9:10, 9:10 to 9:20 with available slots from 9:10 to 9:20, and actual slots are displayed in the same 10-minute increments. 3. The configuration change causes an overbooking in the 9:00 to 9:10 slot, because it was booked for two appointments in the previous configuration. |
| Lead time | You can change the lead time value without impacting any existing appointments. |

Vaccination Appointment Configuration form (continued)

| Field | Recommendation and Impact |
|------------------------------|---|
| Future bookable max days | <ul style="list-style-type: none"> Do not decrease the value because appointments may have been booked on the last day in the current location. Decreasing the value invalidates appointments booked on the last day. You can increase the value without impacting any existing appointments. |
| Reschedule or cancel by time | <ul style="list-style-type: none"> You can conditionally change the value. If there is any work flow that impacts existing appointments or users, it is not safe to change the value. |
| Active | <ul style="list-style-type: none"> Do not deactivate the configuration when there are existing appointments. It invalidates existing appointments. You can activate the previously inactive configuration without impacting any appointments. |

Vaccination Schedule form

The screenshot shows the 'Vaccination Schedule New record' form. It includes the following fields:

- Name: An input field with a red asterisk.
- Start date: A date picker field with a red asterisk.
- Appointments per window: A text input field.
- Daily start time: A dropdown menu with options including "-- None --".
- Bookable days: A checkbox group with options for Mon, Tue, Wed, Thu, Fri, Sat, and Sun. Mon, Tue, and Wed are checked by default.
- End date: A date picker field with a red asterisk.
- Appointment duration: A text input field set to "30 mins".
- Daily end time: A dropdown menu with options including "-- None --".
- Appointment booking preview: A large text area for previewing bookings.
- Include daily break: A checkbox.

Vaccination Schedule form

| Field | Recommendation and Impact |
|-------|---|
| Name | You can change the name field without causing undesired side effects. |

Vaccination Schedule form (continued)

| Field | Recommendation and Impact |
|-------------------------|---|
| Start date | <ul style="list-style-type: none"> • Do not increase the value because appointments may be booked between the old start date and the new start date. Increasing the value invalidates appointments booked between the old start date and the new start date. • You can decrease the value only when there are no overlapped slots configured in the other schedule under the same appointment configuration. • For example: <ol style="list-style-type: none"> 1. Say that your old schedule has a start date of April 8, 2021 and bookable days from Monday to Friday from 09:00 to 18:00. 2. Suppose that you created another schedule under the same appointment configuration which has a start and end date of March 1, 2021 to March 31, 2021. 3. Now, if you change the schedule start date to March 31, 2021, it creates an overlapped bookable slot with the existing schedule on March 31, 2021 and the system will create an error. |
| End date | <ul style="list-style-type: none"> • Do not decrease the value because appointments may be booked between the new end date and the old end date. Increasing the value invalidates appointments booked between the new end date and the old end date. • You can increase the value only when there are no overlapped slots configured in the other schedule under the same appointment configuration. |
| Appointments per window | <ul style="list-style-type: none"> • Do not set the number of appointments per window to 0. • You can increase the number of appointments per window. • Do not decrease the number of appointments per window for a service configuration when appointments have already been created. |

Vaccination Schedule form (continued)

| Field | Recommendation and Impact |
|------------------|--|
| | <ul style="list-style-type: none"> Impact: Reducing the total number of appointments per window results in overbooked appointments per slot for the appointments that were created before the change. For example: <ol style="list-style-type: none"> Old configuration: You had 4 appointments per window. If the total number of windows = 2, then your total capacity is $2*4$, or 8. If you had 4 appointments created per slot, the total capacity used is $4*2$, or 8. New configuration: You have 2 appointments per window. If you have two total windows, then your new total capacity is $2*2$, or 4. But if you had 4 appointments already created per slot (based on a past configuration), then your total capacity is $4*2$, or 8. With this configuration, the total capacity, 8, exceeds the new total capacity of 4, causing overbooked appointments. |
| Daily start time | <p>Do not modify the daily start time when appointments are already present. Modification creates overbooked slots and invalidates previous appointments.</p> |
| Daily end time | <ul style="list-style-type: none"> You can increase the daily end time. The increase is only valid when the appointment duration and daily start values are not changed. Do not make the daily end time earlier when appointments are already present. Doing so creates overbooked slots and invalidates previous appointments. |
| Bookable days | <ul style="list-style-type: none"> You can add days without impacting existing appointments. Removing the bookable days when appointments have already been created invalidates past appointments. For example: |

Vaccination Schedule form (continued)

| Field | Recommendation and Impact |
|---------------------|--|
| | <ol style="list-style-type: none"> 1. In your old configuration, suppose that Saturday is bookable and appointments are booked on Saturday. 2. If you create a new configuration in which Saturday is not bookable, any appointments previously booked for Saturday are no longer valid. |
| Include daily break | <ul style="list-style-type: none"> • Do not change the value of the Include daily break check box. • Do not add the daily break time if this check box is cleared. • Do not change the duration of the break. • Do not set the break start time and end time to be the same as the daily start time and daily end time because it will not generate bookable slots. |

Configure inventory-based scheduling for a center

Configure scheduling based on available inventory for a center.

Before you begin

Navigate to **Vaccine Administration Management > Administration > Properties**, and make sure that the **Enables vaccine inventory management** property (`sn_vaccine_sm.enable_inventory_management`) is selected.

⚠ Warning: Once you've enabled the property and your inventory-based configurations are live, avoid disabling the property to prevent any data inconsistencies.

Role required: `sn_vaccine_sm.admin` or `sn_vaccine_sm.inventory_manager`

About this task

Configure scheduling based on available inventory for a center. Inventory-based scheduling enables you to limit appointment booking based on the available inventory for that day. For example, say that a center has 200 available doses and 500 available appointment slots for a particular day. Because there are only 200 doses, appointment booking would be capped at 200 appointments for that day.

When you receive a vaccine supply lot at a particular center, you can provide details about the lot for the vaccine type, number of doses, expiration date, and so on, and add it to your inventory. You can then automate or manually distribute the inventory over a specified date range. You can also manually track wasted doses.

Important: This feature is only available for user-scheduled appointments. It is not currently supported for mass booking.

Procedure

1. Navigate to **Vaccine Administration Management > Administration > Programs**.
2. Open a program record.
3. In the Center related list, open a vaccination center record.
4. In the Vaccine Supply Lots related list, create a new record for each vaccine supply lot that you receive at that location.

a. Click **New.**

b. On the form, fill in the fields.

Vaccine Supply Lot form

| Field | Description |
|-----------------------|---|
| Lot number | Number of the lot. |
| Vaccine model | Vaccine model of the lot. |
| Center | Program center that the lot is located at. |
| Available from | Date that the lot is available from. |
| Expires on | Date that the lot expires, as specified by the manufacturer. |
| Notes | Notes about the lot. |
| Total number of doses | Total number of doses in the lot. This number must be manually calculated by the inventory manager. |
| State | State of the lot: <ul style="list-style-type: none"> ▪ Not available ▪ Available |

c. Right-click the form header and click **Save.**

d. To confirm that the lot was received and is included in the inventory for that location, click **Make Available.**

5. To distribute the lot automatically.

a. Open the vaccine supply lot record.

b. Click **Distribute.**

The lot is evenly distributed over a specified number of business days based on the location's appointment scheduling configuration. For example, say that the lot is distributed over seven days at a center that is closed on Saturday and Sunday. If the lot distribution begins on Monday, then it is evenly distributed over the next seven business days (Monday through Friday of that week, and then the following Monday and Tuesday).

i Note:

By default, the number is set to seven days. To change the number of days, navigate to **Vaccine Administration Management > Administration > Properties**, and update the **Number of days to distribute a lot** property (*sn_vaccine_sm.im_lot_distribution_day_count*).

When you distribute the lot automatically, you have the option to then manually adjust the allocated doses for an individual day. Open the Vaccine Availability by Lot record for the day that you want to update the doses for, and then update the **Allocated Doses** field.

6. To distribute the lot manually.

a. Open the vaccine supply lot record.

b. In the Vaccine Availability related list, click **New**.

c. On the form, fill in the fields.

Vaccine Availability form

| Field | Description |
|-----------------|--|
| Center | Center that the vaccine is available from. |
| Available on | Date that the vaccine is available from. |
| Vaccine model | Vaccine model of the program. |
| Allocated doses | This field value is automatically set. |
| Booked doses | This field value is automatically set. |
| Used doses | This field value is automatically set. |

| Field | Description |
|--------------|--|
| Wasted doses | Number of wasted doses per day. This number must be manually entered by the inventory manager. |
| Notes | Notes about the availability of the vaccine. |

- d. Right-click the form header and click **Save**.
- e. In the Availability By Lot related list, click **New**.
- f. On the form, fill in the fields.

Vaccine Availability By Lot form

| Field | Description |
|-----------------|---|
| Supply Lot | Lot to associate with the vaccine availability. |
| Available On | Date that the vaccine is available from. The date must be within the availability and expiration range of the associated lot. |
| Allocated Doses | Number of allocated doses. The number of allocated doses must be less than the total number of doses available in the associated lot. |
| Notes | Notes about the vaccine availability for this lot. |

- g. Click **Submit**.
- h. To create more records for vaccine availability, repeat the Availability By Lots procedure, as needed.

Configure vaccine appointment scheduling

Appointments are automatically scheduled when users request a vaccination through the portal or when using mass booking. Define a schedule for the automatic appointment creation to follow, such as only creating appointments on specific days of the week or during specific time frames.

Before you begin

Role required: sn_vaccine_sm.admin

About this task

Vaccine Administration Management provides an appointment configuration that you can modify to meet your organization's requirements.

Appointments are automatically scheduled for users according to the configuration that you set up. However, users can select a different appointment time in the portal if the automatically scheduled time is not convenient.

Important: This default appointment scheduling configuration is applied across all centers. Beginning with version 4 of Vaccine Administration Management, advanced appointment scheduling configuration is available. To learn more about how to enable and configure the feature, see [Configure advanced appointment scheduling for a center](#).

Procedure

1. Navigate to **All > Vaccine Administration > Administration > Service Configurations**.
 2. Click the Schedule Vaccine Appointment record.
 3. Update the information in each section of the form to modify the configuration as needed.
For detailed instructions on how to fill in each section, see [Configure appointment booking](#).
- For details on how to handle appointment booking configurations after appointments start getting scheduled, see [Recommendations on Appointment Booking configuration for Vaccine Administration Management \[KB0953615\]](#).
4. Click **Update**.

Multi-vaccine appointment bookings configuration

Administer multi-vaccine appointment bookings based on auto-selection and manual selection of the vaccine method. You can select your preferred vaccine method based on the eligibility criteria, order of method selection, and inventory availability.

You can manage multi-vaccine appointment bookings after making configuration changes to the Vaccine Administration Management system properties. Multi-vaccine functionality can be broadly categorized into auto-selection of the vaccine method and manual selection of the vaccine method.

Note: If your first appointment has been completed, you cannot change the method. However, you have the flexibility to change the method while rescheduling your first dose. While rescheduling your appointment, if you change the method, it automatically applies to the second dose as well.

Among other criteria, the multi-vaccine method also supports age-based eligibility and assignment by specifying the age groups in the eligibility criteria for the method. The list of methods is visible only if you are eligible for more than one vaccine method.

For example, say that only age groups over 60 are eligible to receive the Pfizer vaccine. If you are not in this age group, you will not be assigned the Pfizer vaccine despite availability. Instead, the system evaluates other methods that meet the eligibility criteria defined for the program and the method.

Auto-selection of method

Note: Auto-selection of the vaccination method only applies if the `sn_vaccine_sm.enable_inventory_management` system property value is **true**.

When you try to book an appointment, the system auto-assigns the method of vaccine based on the order of method selection and inventory availability. In other words, if the inventory management system property (`sn_vaccine_sm.enable_inventory_management`) is **true**, the vaccination request auto-assigns the method with the lowest order that has inventory availability.

For example, if a vaccination center has the Moderna vaccine in the inventory, the request is created using Moderna instead of Pfizer, even when Pfizer is the method with the lowest order.

Manual selection of method

You can manually select the preferred vaccination method while booking an appointment. Manual selection of the method works with or without vaccine inventory management.

If the slot selection system property (`sn_vaccine_sm.enable_appointment_slot_choice`) is **false**, the vaccine method selected is kept as the preference. If there is no availability for the second dose, the system books the slot at the closest vaccination center having the same method. For example, if you select a vaccination site and the site has only one week of the Pfizer vaccine available, the second dose is selected in the nearest center having the same method.

Note: For the functionality to run properly, make sure that both the inventory management system property (`sn_vaccine_sm.enable_inventory_management`) and the enable multi-vaccine system property (`sn_vaccine_sm.enable_multi_vaccine`) values are **true**.

Book appointments for subsequent doses after a previous dose is complete

Define whether to enable booking for all doses of the vaccine, for both mass booking and self-service, or to enable booking for the first dose, with subsequent appointments booked after the first dose is administered.

Before you begin

Role required: `sn_vaccine_sm.admin`

Procedure

1. Navigate to **All > Vaccine Administration Management > Administration > Properties**.

For the `sn_vaccine_sm.book_subsequent_doses` property:

- If set to **true**, appointments are booked for all doses of the vaccine, both in mass scheduling and self-service.
- If set to **false**, only the appointment for the first dose is booked and subsequent appointments are booked only after the previous dose is administered.

2. Click **Save**.

Privacy policy settings for Vaccine Administration Management

Users are required to provide their privacy consent at the time of registration on the Vaccine Administration Management portal.

The Migrate Terms and Condition Data fix script is used for moving existing users who have accepted the Vaccine Administration Management policy automatically to the new Healthcare and Life Sciences policy.

For more information about configuring privacy policy settings, see [Configure privacy policy settings for the Patient Portal](#).

Customize vaccination notification emails

Customize the vaccination notification emails that are sent to users about vaccination appointments. Using the customizations, you can keep users informed about activities, such as updates to vaccination booking appointments.

Vaccine Administration Management includes the following email notifications.

Email notifications

| Email notifications | Description |
|---------------------------------|--|
| Vaccine Appointment Confirmed | An email notification sent to the user as confirmation when an appointment is created. |
| Vaccine Appointment Reminder | An email reminder sent to the user before the scheduled appointment. |
| Vaccine Appointment Canceled | An email notification sent to the user when an appointment is canceled. |
| Vaccine Appointment Rescheduled | An email notification sent to the user when an appointment is rescheduled. |

The email notifications are automatically sent to users once the appointment is created, canceled, or rescheduled. The notifications can be used without modifications. However, as a user with the sn_vaccine_sm.admin role, you can also choose to customize them for your organization. For more information about creating and editing email notifications, see [Create an email notification](#).

Mass book vaccine appointments

Schedule appointments for multiple users at the same time instead of having users individually request appointments in the self-service portal.

Before you begin

Navigate to **Vaccine Administration Management > Administration > Properties**.

Set the following property values in the System Property [sys_property] table.

System property table

| Property | Description |
|---|--|
| sn_vaccine_sm.vaccine.management.booking.max_distance | The maximum distance, in miles, that is searched for an available vaccination location if there is no appointment slot available at the user's preferred center. |

System property table (continued)

| Property | Description |
|--|--|
| | The default value is 50 . |
| sn_vaccine_sm.vaccine.management.booking.distance_unit | <p>The unit of measurement for the distance considered for vaccine appointment mass booking. The options are mi and km.</p> <p>The default value is mi.</p> |
| sn_vaccine_sm.vaccine.management.booking.max_locations | <p>The maximum number of alternate locations that are searched for a vaccination if there is no appointment slot available at the user's preferred location. A higher value for this property increases the time that it takes to complete mass booking.</p> <p>The default value is 5.</p> |

Role required: sn_vaccine_sm.admin and admin

About this task

Important: Mass booking does not currently support inventory-based scheduling.

Procedure

1. Create a temporary table.

The table should either:

- Extend sys_user.

Note: For more information about extending tables, see [Create a table](#).

- The user field in the table should have a reference to the sys_user.

2. Import the following health history data for each user into the temporary table.

- User
- Preferred vaccination center
- Age group
- Allergies to medications, food, a vaccine component, or latex (Yes/No)
- Serious reaction or fainted or nearly fainted during or after vaccination (Yes/No)
- Seizures or history of brain or nervous system problems (Yes/No)
- Long-term health problem with heart disease, lung disease, asthma, kidney disease, metabolic disease, (for example, diabetes), anemia, or other blood disorder (Yes/No)

Note: This data is required to book appointments for users. If users book the appointments in the self-service portal, the users provide this information at the time of booking. When a user with the admin role mass-books appointments for users, the data must be imported instead.

For more information about importing data, see [Import sets](#).

3. Navigate to **Vaccine Administration Management > Administration > Mass Booking Configurations** and click **New**.
4. Enter a name to describe the users included in the configuration.
5. In the **Program** field, select the vaccination program to book appointments for.
6. In the **Table Name** field, select the temporary table that you created.
7. In the following fields, select the corresponding column from the temporary table to map the user data from the temporary table to the user's appointment.
 - **Health history**
 - **Vaccine reaction**
 - **Age group**
 - **Preferred center**
 - **User**
 - **Long term health issues**
 - **Allergies**
8. In the **Conditions** field, add filter conditions to define which users to book appointments for.
9. To complete the configuration, click **Submit**.
 - The configuration is saved but the appointments are not scheduled yet.
 - If a consumer or patient record does not exist for any user that has an appointment is booked, these records are created for the user.

What to do next

When you're ready to schedule the appointments, return to the configuration record and click **Process Booking**.

Note: Whenever you process a booking, a new record gets created on the **Mass Booking Jobs** tab. Use this tab to view the progress of the scheduled appointments, for example, you can view the number of total appointments booked, appointments booked in a preferred center, the number of bookings failed for users, and so on.

Cancel appointments in a given date range

Cancel multiple appointment bookings at a location in a given date range.

Before you begin

Role required: sn_vaccine_sm.admin or sn_vaccine_sm.manager

Procedure

1. Navigate to **All > Vaccine Administration Management > Administration > Centers**.
2. Open the vaccination center record that you want to modify.
3. To cancel all appointments at the current location in a given date range along with subsequent doses, if any, click **Cancel Appointments**.

- A pop-up window appears that enables you to cancel the appointments by choosing the start date and the end date and click **Yes**.
If the end date is empty, all appointments after the start date get canceled.

Vaccine Administration Management system properties

Vaccine Administration Management booking uses the following system properties. Users with the admin role can access the property settings by navigating to **All > Vaccine Administration Management > Administration > Properties**.

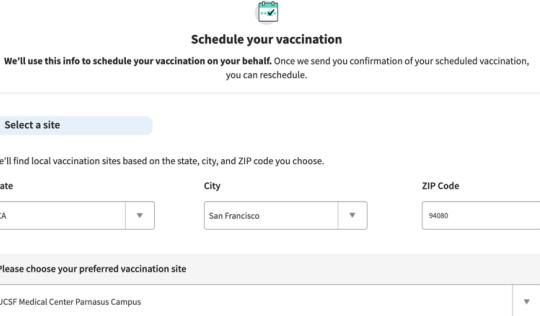
Vaccine Administration Management system properties

| Property | Description |
|---|--|
| sn_vaccine_sm.enable_appointment_slot_choice | <p>Enables or disables appointment slot choice.</p> <p>When set to true, users can choose the slot. When set to false, the system books an appointment automatically.</p> <p>The default value is false.</p> |
| sn_vaccine_sm.self_booking_slots_fetched | <p>Specifies the number of slots fetched by the system to book an appointment in user self-booking. The higher value reduces any chance of failed appointments in high concurrency scenarios.</p> <p>The default value is 1.</p> <p>Note: The system property only applies if the <code>sn_vaccine_sm.enable_appointment_slot_choice</code> value is false.</p> |
| sn_vaccine_sm.vaccine.management_booking_distance | <p>Defines the booking distance unit for the distance considered for vaccine appointment mass booking. The options are mi or km.</p> <p>The default value is mi.</p> |
| sn_vaccine_sm.vaccine.management_booking_max_center_differences | <p>Gets the booking max center differences, that is searched for an available vaccination location if there is no appointment slot available at the user's preferred center.</p> <p>The default value is 50.</p> |
| sn_vaccine_sm.vaccine.management_booking_max_center_alternates | <p>Gets the booking max center alternates locations that are searched for a vaccination if there is no appointment slot available at the user's preferred location. A higher value for this property increases the time that it takes to complete mass booking.</p> <p>The default value is 5.</p> |

Vaccine Administration Management system properties (continued)

| Property | Description |
|---|--|
| sn_vaccine_sm.vaccine.management.default_program | Defines the default program for the Vaccine Administration Management portal. |
| sn_vaccine_sm.book_subsequent_doses | <p>Enabled</p> <p>Enables booking for all doses of the vaccine, for both mass booking and self-service, or enable booking for the first dose, with subsequent appointments booked after the first dose is administered.</p> <p>When set to true, appointments are booked for all doses of the vaccine, both in mass scheduling and self-service. When set to false, only the appointment for the first dose is booked and subsequent appointments are booked only after the previous dose is administered.</p> <p>The default value is true.</p> <p>For more information about booking subsequent doses, see Book appointments for subsequent doses after a previous dose is complete.</p> |
| sn_vaccine_sm.enable_vam_center_specific_scheduling | <p>Enabled</p> <p>Enables Vaccine Administration Management location-specific appointment scheduling configuration.</p> <p>The default value is true.</p> <p>For more information about enabling location-specific appointment configuration, see Configure advanced appointment scheduling for a center.</p> |
| sn_vaccine_sm.fetch_next_available_slot | <p>Enabled</p> <p>Enables or disables fetching for the next available slot when opening the appointment booking calendar.</p> <p>The default value is true.</p> |
| sn_vaccine_sm.strict_check_lead_time | <p>Display time</p> <p>Specifies the time after which the first available appointment slot is shown to the user.</p> <p>When set to true, slots for subsequent doses are calculated to accuracy, measured in seconds, using lead or max times. When set to false, the second slot can be booked at any time.</p> <p>For example, if the first dose is administered on June 1, 5:00 PM and the lead time is 21 days, the second slot can be booked after June 22, 5:00 PM. However, if the property is false, the second slot can be booked at any time on June 22.</p> <p>This system property affects mass booking.</p> |

Vaccine Administration Management system properties (continued)

| Property | Description |
|--|--|
| | <p>The default value is true.</p> |
| sn_vaccine_sm.enable_self_registration | <p>Enable or disable self-registration for booking appointments.</p> <p>When set to true, the user can register and sign up for the vaccine. When set to false, only existing users can sign up and book appointments.</p> <p>The default value is true.</p> |
| sn_vaccine_sm.show_location_filters | <p>Show or hide the location filters in the Schedule your vaccination page.</p> <p>When set to true, the list of preferred vaccination sites is filtered automatically using the personal information shared by the user. However, you can also look for other vaccination sites based on your preferred choice of state, city, or zip code.</p>  <p>When set to false, the location filters are inactive.</p> <p>The default value is true.</p> |
| sn_vaccine_sm.mass_booking_parallel_queues | <p>Configure the number of parallel queues used to process mass booking.</p> <p>The allowed values are 1 to 8.</p> <p>Note: A maximum of 8 queues can be used for mass booking. Even if a user with the admin role sets the property to a value greater than 8, only 8 queues are created.</p> <p>The default value is 4.</p> <p>For more information about enabling mass booking parallel processing, see Manage high number of concurrent bookings.</p> |

Vaccine Administration Management system properties (continued)

| Property | Description |
|---|---|
| sn_vaccine_sm.search_assist_auto_minimize | <p>The search assist section and view the search results even at 200% zoom. To expand the search assist section, click Show search assist.</p> <p>When set to true, clicking Search automatically minimizes the search assist section. When set to false, the system returns to its default behavior.</p> |
| sn_vaccine_sm.enable_inventory_based_scheduling | <p>Enables scheduling based on available inventory for a program location center.</p> <p>The default value is false.</p> <p>For more information about enabling inventory management, see Configure inventory-based scheduling for a center.</p> |
| sn_vaccine_sm.im_batch_distribute_days | <p>Set the number of days to distribute a supply lot. You can distribute the inventory evenly over a specified date range.</p> <p>The default value is 7.</p> |
| sn_vaccine_sm.enable_multi_selection | <p>Change the order of method selection while scheduling your vaccinations.</p> <p>When set to true, the auto-selected method is based on the lowest method order and inventory availability. When set to false, the method with the lowest order is selected.</p> <p>Note: The system property only applies if the <code>sn_vaccine_sm.enable_inventory_management</code> value is true.</p> <p>The default value is false.</p> |
| sn_vaccine_sm.multi_vaccine_availability_check_days | <p>Set the number of days to check for the availability in the method selection.</p> <p>Note: The system property only applies if the <code>sn_vaccine_sm.enable_multi_vaccine</code> value is true.</p> <p>The default value is 7.</p> |
| sn_vaccine_sm.allow_user_selection | <p>Enable or disable method selection.</p> <p>When set to true, users can choose the method while scheduling and rescheduling their appointments.</p> <p>When set to false, the system auto-selects the</p> |

Vaccine Administration Management system properties (continued)

| Property | Description |
|---|--|
| <code>sn_vaccine_sm.enable_multi_vaccine</code> | method based on the configuration of the <code>sn_vaccine_sm.enable_multi_vaccine</code> system property. The default value is false . |
| <code>sn_vaccine_sm.covid.test.validity</code> | Set the maximum duration in days that is used for infectious diseases, such as COVID-19 test report validity. The default value is 3 . |
| <code>sn_vaccine_sm.vaccine.management_report</code> | Enable or disable the <code>management_report</code> that is generated on COVID-19 vaccine self report submission. The default value is false . |
| <code>sn_vaccine_sm.vaccine.management_required_programs</code> | Define the list of programs that require proof of vaccination. |
| <code>sn_vaccine_sm.vaccine.management_programs</code> | Define the program codes of the infectious diseases, such as COVID-19 vaccination program. |
| <code>sn_vaccine_sm.enable_cache</code> | Enable or disable scoped cache for use with the application. When set to true , scoped cache is enabled. When set to false , data is not cached and instead queried from the database directly. The default value is true . |

Configuring the Patient Portal for Vaccine Administration Management

Complete all configuration tasks to ensure that the Vaccine Administration Management (VAM) Patient Portal is set up correctly for the user.

Patient Portal configuration tasks for VAM

| Task | Description |
|---|---|
| Set up the process for submitting personal information. | Set up the process for enabling users to submit their personal information for vaccines on the Patient Portal by using a record producer. |
| Configure the preferred vaccine method. | Configure the preferred vaccination method while scheduling a vaccination appointment. |

Patient Portal configuration tasks for VAM (continued)

| Task | Description |
|--|--|
| Configure appointment scheduling for a vaccination center. | Configure advanced appointment scheduling for a vaccination center based on available inventory. |

Setting up the process for submitting personal information for vaccines

You can set up the process for enabling users to submit their personal information for vaccines on the Patient Portal by using a record producer.

As a user with the `sn_vaccine_sm.admin` role, you can configure what user information is collected by updating the `Enter your personal info` record producer. You can use the default record producer to add more fields or create your own record producer. For details on how to configure a record producer, see [Record Producer ↗](#).

Configuring preferred vaccination method

You can configure the preferred vaccination method while scheduling a vaccination appointment.

As a user with the `sn_vaccine_sm.admin` role, you can choose your preferred vaccination method while scheduling or rescheduling your appointments by setting the `sn_vaccine_sm.allow_user_selection_of_vaccine_method` system property value to **true**.

For details on how to configure multi-vaccine appointment bookings, see [Multi-vaccine appointment bookings configuration](#)

Configuring appointment scheduling for a vaccination center

You can configure advanced appointment scheduling for a vaccination center based on available inventory.

As a user with the `sn_vaccine_sm.admin` role, you can configure the scheduling by updating the `Schedule vaccine appointment` record producer. For details on how to configure a record producer, see [Record Producer ↗](#).

Also, you can configure location-specific and inventory-based appointment scheduling. For details, see:

- [Configure advanced appointment scheduling for a center](#).
- [Configure inventory-based scheduling for a center](#).

Turn off automatic email notifications for mass booking

Turn off automatic email notifications by first turning off the default notification for the appointment configuration, then turn off the corresponding business rule. By default, email notifications are automatically sent to users when the appointments are scheduled as part of mass booking.

Before you begin

Role required: admin or `sn_vaccine_sm.admin`

About this task

Emails are auto-generated and shared when users request a vaccination through the self-service portal. Vaccine Administration Management provides an appointment configuration that you can modify to stop emails from being sent for mass scheduling vaccine appointments.

With the help of admin access, you can configure and modify the business rules to meet your organization's requirements.

Procedure

To turn off the default notification for the appointment configuration.

- a. Navigate to **Vaccine Administration Management > Administration > Appointment Configurations**.
- b. Open the Schedule Vaccine Appointment record.
- c. Select the **Ignore Default Notifications** check box.
- d. Click **Update**.

You cannot disable email notifications for mass booking alone. If you disable the email notification events for mass booking, it applies to the self-service booking as well.

To turn off email notifications during mass booking.

- a. Navigate to **System Notification > Email > Notifications**.
- b. Open the Vaccine Appointment Confirmed record.
- c. In the **Active** field, select **False**.
- d. Click **Update**.

Configure an appointment reminder and pre-appointment questionnaire

By default, appointment reminders are not sent to the user. To enable appointment reminders, you must configure the appointment reminder in the appointment configuration record. You can also configure the pre-appointment questionnaire for users.

Before you begin

Role required: admin

About this task

The appointment reminder sends a reminder email and a pre-appointment questionnaire to the user at a specified time.

Procedure

1. To configure the appointment reminder.

- a. Navigate to **Vaccine Administration Management > Administration > Appointment Configurations**.
- b. Open the Schedule Vaccine Appointment record.
- c. In the **Appointment reminder** field, select the reminder time.

Note: If the field doesn't appear on the form, a user with the admin role must configure the form layout to include it. In the form header, click the form context menu icon (≡). Navigate to **Configure > Form Layout** and move the **Appointment reminder** field to the Selected list, then click **Save**.

By default, appointment reminders are not sent to the user. If you want the user to receive the email reminder, configuration of both the appointment reminder and the pre-appointment questionnaire is required.

d. Click **Update.**

2. Configure the pre-appointment questionnaire.

a. Navigate to **Vaccine Administration Management > Administration > Pre-appointment Questionnaire.**

The Pre-appointment Questionnaire record producer is displayed.

b. In the Variable Sets related list, open the Pre-vaccination screening record.

The *Pre-vaccination screening* variable set is displayed.

c. In the Variables related list, create or update variables for the questionnaire.

For details on how to configure a variable, see [Service catalog variables](#).

Important: Do not configure the *task_id* and *is_portal* variables.

| Variables (6) Catalog UI Policies Catalog Client Scripts (1) Included In (1) | | | | |
|--|---------------------------|------------------------|---|---------|
| Variables | New | Search | Order | Search |
| <i>Variable set = Pre-vaccination screening</i> | | | | |
| | Name | Type | Question | Order ▲ |
| <input type="checkbox"/> | <i>task_id</i> | Single Line Text | Task ID | |
| <input type="checkbox"/> | <i>is_portal</i> | Single Line Text | Is from portal | |
| <input type="checkbox"/> | <i>recently_sick</i> | Lookup Multiple Choice | Have you had a fever or felt ill in the ... | 100 |
| <input type="checkbox"/> | <i>recent_vaccination</i> | Lookup Multiple Choice | Have you received any vaccinations in th... | 200 |
| <input type="checkbox"/> | <i>pregnant</i> | Lookup Multiple Choice | Are you pregnant or expecting to be preg... | 300 |
| <input type="checkbox"/> | <i>any_other_comments</i> | Multi Line Text | Any other comments? | 400 |

d. Click **Update.**

Virtual Agent conversations for Vaccine Administration Management

Virtual Agent conversations enable users to get help with the vaccination process.

Vaccine Administration Management provides Virtual Agent conversation topics if the Virtual Agent plugin (`com.glide.cs.chatbot`) is installed. A conversation topic defines the dialog between the Virtual Agent (chatbot) and the user to accomplish a goal.

Conversation topics

| Topic | Description | Default status |
|----------------------------------|--|----------------|
| Book Appointment | <p>Enables users to book vaccination appointments through the chatbot.</p> <p>The questions asked in this topic are the default questions that a user must answer when booking an appointment in the self-service portal.</p> <p>i Note: This topic is a placeholder conversation topic. You can change the questions according to your requirements.</p> | Inactive |
| My Vaccination Phase Eligibility | <p>Informs users about vaccination eligibility and enables users to book an appointment if the user is eligible.</p> <p>i Note: This topic is a placeholder conversation topic. You can change the questions according to your requirements.</p> | Active |
| COVID-19 Vaccine resources | <p>Shows targeted Knowledge articles to the user.</p> <p>i Note: To use this topic, you must activate the ServiceNow® Service Management Topic Blocks plugin (com.glideapp.cs.sm_topic_blocks).</p> <p>The articles shown in this topic are set by a keyword. By default, the topic shows all articles that contain the keyword "vaccine."® To change the keyword, navigate to this topic in the ServiceNow® Virtual Agent Designer. In the topic, click the Contextual Search block. In the Topic Block Properties panel, set the value of the query field to the new keyword.</p> | Inactive |
| COVID-19 | <p>Enables users to report vaccination status and COVID-19 test results using topic blocks.</p> <ul style="list-style-type: none"> Report vaccination status: Enables users to report the vaccination status. <p>i Note: This topic is a placeholder conversation topic. You can change the questions according to your requirements.</p> <ul style="list-style-type: none"> Report COVID-19 test results: Enables users to report COVID-19 test results. <p>i Note: This topic is a placeholder conversation topic. You can change the questions according to your requirements.</p> <p>Non-logged in users who are non-registered users must provide a first name, last name, and email address before they self-report their vaccination status or COVID-19 test results.</p> | Active |

Conversation topics (continued)

| Topic | Description | Default status |
|-------|---|----------------|
| | When users report their vaccination status or COVID-19 test results, email notifications are automatically sent to the user's email ID. | |

To activate, deactivate, or edit conversation topics, navigate to **Collaboration > Virtual Agent > Designer**. In the Topics page, select the **Vaccine Management** category. Click a topic that you want to update. Use the **Active** toggle button to activate or deactivate a topic.

Retry booking for skipped appointment records

Book vaccination requests for skipped appointment records for users whose appointments were unsuccessful or skipped due to missing data.

Before you begin

Role required: sn_vaccine_sm.admin

Procedure

1. Navigate to **All > Vaccine Administration > Administration > Mass Booking Configurations**.
2. Locate and open the mass booking configuration record based on your requirement. Requests and appointments that have been created appear on the **Vaccination Requests** tab.
3. Correct the data and click **Retry Booking**.
The **Retry Booking** option will only run for the users that you selected initially. If you want to make another selection, create a new configuration.

Result

All requests and appointments that have been created appear on the **Vaccination Requests** tab.

Encrypt search fields to appear in search assist

Encrypt search fields to search from a field other than the first name, last name, and phone fields. By encrypting search fields, you can configure them to appear in search assist.

Before you begin

Role required: security_admin

About this task

You can encrypt fields such as the street, city, state, and zip code based on your organization's requirement. Decrypted fields are kept hidden from the search assist. By default, the first name, last name, and phone fields are visible to users.

Procedure

1. Navigate to **All > System Security > Field Encryption > Encrypted Field Configurations**.
2. In the **Search** field, enter `sn_vaccine_sm_personal_info`.
In the Encrypted Field Configurations table, you can see multiple `sn_vaccine_sm_personal_info` fields.
3. Right-click the Active column and select **Group By Active**.

4. In the **Active** field, select **False**.
5. Click **Update**.
6. To encrypt or decrypt fields, repeat steps 3 through step 5, as needed.

Manage high number of concurrent bookings

Manage multiple parallel queues to help process mass booking appointments run in a parallel mode. You can distribute the mass booking event processors to different nodes rather than keeping the load on a single node.

Before you begin

Role required: sn_vaccine_sm.admin

About this task

The `sn_vaccine_sm.mass_booking_parallelism` property helps you implement the appointment booking flow in a parallel mode. With parallel processing, the job creates separate events for each vaccination center. It helps dispatch the events into the available parallel queues evenly. There are a total of eight mass booking event processors.

- Note:** A maximum of eight queues can be used for mass booking. Even if a user with the admin role sets the property to a value greater than **8**, only eight queues are created. However, the default value is set to **4**.

To avoid performance-related issues, configuration changes are required to pin to a specific node. As a user with the admin role, you can choose which thread to point to a specific node so that the load is distributed evenly across all the nodes. For example, if you are using a multi-node instance, you can change the configuration to pin to a specific node by using the system ID field to select the specific node where you want your mass booking event processor to hit. This configuration change can improve the system performance.

Procedure

1. In the navigation filter, enter `sys_trigger.list`.
2. In the **Search** field, enter *mass booking event processor.
In the Schedule table, you can see eight mass booking event processor records.
3. Optional: If you have a multi-node instance, locate the mass booking event processor record and choose a node from the **System ID** column field.
4. Double-click the empty area of the **System ID** field.
 - a. Choose a node from the list of available nodes.
 - b. Save the record by clicking the green checkmark icon (#).
The mass booking event processor record is assigned to a specific node.
5. To assign different mass booking event processor records to specific nodes, repeat step 3 and step 4, as needed.

Manage processing for a high number of concurrent vaccine events

Manage multiple parallel queues to help process vaccine events run in a parallel mode. You can distribute the vaccine queue events process to different nodes rather than keeping the load on a single node.

Before you begin

Role required: sn_vaccine_sm.admin

About this task

You can implement the vaccine queue events process flow in a parallel mode. With parallel processing, the job creates separate events for each vaccine queue. This processing helps distribute the events to all active nodes instead of being processed in a single node.

Procedure

1. In the navigation filter, enter `sys_trigger.list`.
2. In the **Search** field, enter `*vaccine queue events process`.
3. Select the vaccine queue events process record.
4. Set the **System ID** field to **Active Nodes**.
5. Click **Update**.

This configuration creates multiple `sys_trigger` records for each node.

Configure the questionnaire text for the user and clinician portals

Configure the questionnaire text that is displayed in the user and clinician portals for Vaccine Administration Management.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > Catalog > Catalog Definitions > Maintain Catalogs**.
2. Open the Vaccination Catalog record.
3. From the Catalog Items related list, update the questionnaire text by updating the corresponding variables from the following catalog items.

Note: The questionnaire text is distributed across the following catalog items and variables.

Vaccination Catalog

| Catalog item | Variable set | Variable |
|-------------------------------|---------------------------|--------------------------|
| Pre-appointment questionnaire | Pre-vaccination screening | recently_sick |
| | | recent_vaccination |
| | | pregnant |
| Schedule your vaccination | Disclose any conditions | long_term_health_issues |
| | | long_term_health_history |
| | | any_reaction |

| Catalog item | Variable set | Variable |
|--------------------------|-----------------------|----------------|
| | | any_infections |
| Enter your personal info | Your demographic info | age_group |

For details on how to configure a variable, see [Service Catalog variables](#).

i Important:

- Updating the questionnaire text updates that text in both the user and clinician portals.
- If you deactivate a variable, then the question will be hidden in both the user and clinician portals.
- If you're creating a question, the new question is not displayed in the clinician portal by default. You must also update the pre-vaccine_questionnaire widget by navigating to **All > Service Portal > Widgets**. For details on how to configure a widget, see [Service Portal widgets](#).

4. Click **Update**.

Configure VAM property to enable scoped caching

Use a scoped cache instead of a global cache in Vaccine Administration Management to improve application performance.

Before you begin

Role required: admin

About this task

Prior to the Tokyo release, the VAM application used a global cache. Existing users using a global cache who want to improve application performance by using a scoped cache must first enable it by configuring a system property.

i Note: For new users in the Tokyo release, scoped caching is enabled by default.

Procedure

1. Enter `sys_properties.list` in the navigation filter.
2. Search for `sn_vaccine_sm.enable_cache`.
3. In the **Value** field, enter `true` to enable scoped caching.
4. Click **Update**.

Encryption options in Vaccine Administration Management

Vaccine Administration Management provides encryption support to secure sensitive information.

Encryption prevents unauthorized users from viewing sensitive healthcare data.

The Column Level Encryption Enterprise option on the Now Platform is supported in the Vaccine Administration Management application.

Column Level Encryption Enterprise

Column Level Encryption Enterprise provides an enhanced encryption capability compared to Encryption Support and utilizes the Key Management Framework (KMF).

When as an administrator, you install the Vaccine Administration Management application, the crypto modules and encryption configurations to encrypt sensitive fields along with the KMF are also installed automatically. For managing and auditing cryptographic operations on your ServiceNow instance, as an administrator, you can choose to optionally activate the Column Level Encryption Enterprise plugin (com.glide.now.platform.encryption). For more information about obtaining Column Level Encryption Enterprise, see [Activate Column Level Encryption Enterprise](#). For more information about selecting the parent crypto module, see [Create a cryptographic module](#).

Vaccine Administration Management encrypted fields

| | |
|-----------------------------|--------------------|
| sn_vaccine_sm_personal_info | occupation |
| sn_vaccine_sm_personal_info | preferred_id |
| sn_vaccine_sm_personal_info | zip |
| sn_vaccine_sm_personal_info | province |
| sn_vaccine_sm_personal_info | healthcare_worker |
| sn_vaccine_sm_personal_info | age_group |
| sn_vaccine_sm_personal_info | gender |
| sn_vaccine_sm_personal_info | country |
| sn_vaccine_sm_personal_info | ethnicity |
| sn_vaccine_sm_personal_info | other_occupation |
| sn_vaccine_sm_personal_info | street |
| sn_vaccine_sm_personal_info | city |
| sn_vaccine_sm_questionnaire | recently_sick |
| sn_vaccine_sm_questionnaire | recent_vaccination |

Vaccine Administration Management encrypted fields (continued)

| | |
|-----------------------------|--------------------------------|
| sn_vaccine_sm_questionnaire | any_other_comments |
| sn_vaccine_sm_questionnaire | pregnant |
| sn_vaccine_sm_request | age_group |
| sn_vaccine_sm_request | any_infections |
| sn_vaccine_sm_request | long_term_health_issue_details |
| sn_vaccine_sm_request | health_history |
| sn_vaccine_sm_request | any_reaction |
| sn_vaccine_sm_request | long_term_health_issues |

Using Vaccine Administration Management

Learn how users, clinicians, and provider admins use Vaccine Administration Management.

Using the Patient Portal to register for a vaccination program

As a user with the sn_vaccine_sm.user role, you can register for a vaccination program, provide your personal information, schedule and manage your vaccination appointments, provide health updates, and more, all from within a single, self-service portal.

Using the Patient Portal for vaccinations

The screenshot shows the ServiceNow Patient Portal landing page. At the top, it says "Hello, Adela Cervantsz" and "Managing your health has never been easier." There is a photo of a smiling doctor wearing a white coat and glasses. Below this, there are two main sections: "Vaccinations" and "COVID-19 status". The "Vaccinations" section shows a box for scheduling a "Flu vaccination - Annual dose" and a "Schedule vaccination" button. The "COVID-19 status" section shows a QR code, vaccination status as "Complete" with a green checkmark, and a COVID-19 test result as "Negative" with a green checkmark. Below these sections, there is a "Latest news & articles" section with three articles: "Eight Ways to Build Wellness into Your Business Wellness programs.", "Let's talk about mental health: A guide to your resources & more", and "Pandemic Pets - Plan for the Expense of Your New Furry Friend". At the bottom, there is a "Frequently asked questions" section with answers to common queries like "I am pregnant, can I still get the COVID vaccine?", "Is there a risk of severe allergic reaction if I receive the vaccine?", and "Can I get COVID-19 vaccine at the same time as another vaccine?". A blue speech bubble icon is located in the bottom right corner of the page.

On the landing page, in the COVID-19 status widget, you can see all the information regarding the vaccination status and COVID-19 test results.

You can scan the QR code to share your vaccination status and test results details, such as the status of the doses being administered, vaccination dates, vaccination status, vaccination method, and test results. You can also view details about your vaccination status and COVID-19 test results by clicking **View Details**.

Register as a patient

If you've created an account on the Patient Portal and have also installed the Vaccine Administration Management application, you can schedule vaccinations for yourself and for other household members.

Provide your personal information

Provide your personal information in the Patient Portal

Once registered, you can provide your personal information to help organizations determine when you're eligible for appointment scheduling.

When you log in to the portal later, you can see vaccines that you're eligible for, or vaccines that you have remaining to schedule, in the Suggested vaccines for you section of the landing page. You can also see your vaccination history.

The screenshot shows the ServiceNow Patient Portal interface. At the top, there's a dark header bar with the 'now' logo and navigation links for 'Appointments' and 'Vaccinations'. Below the header, the main content area has a title 'Enter your personal info' with a small icon of a clipboard with a plus sign. A note below the title states: 'This info is required and helps us determine the scheduling of your vaccination. Different groups of people are vaccinated in different phases.' The form is divided into sections: 'Your work situation' (with a question about interacting with people in person and 'Yes'/'No' radio buttons), 'Your demographic info' (with fields for date of birth, gender, and ethnicity). The 'Your demographic info' section includes a date input field ('YYYY-MM-DD') with a calendar icon, and dropdowns for gender ('Male', 'Female', 'Other') and ethnicity ('Hispanic or Latino', 'Black or African American', 'Native American', 'Decline to say', 'Asian American', 'White', 'Other').

Schedule and manage your vaccinations

Schedule and manage your vaccines in the Patient Portal

If you are eligible, schedule your vaccination appointments.

You can choose your preferred vaccination method. However, the availability depends on the order of method selection as well as the inventory availability.

You can either choose the same vaccination site for multiple doses, or you can choose a different vaccination site for each dose. After you schedule your appointments, an appointment confirmation with a QR code is emailed to you.

The screenshot shows the ServiceNow Patient Portal interface. At the top, there's a dark header bar with the 'now' logo and a user profile icon. Below it, a blue navigation bar has 'Appointments' and 'Vaccinations' tabs. The main content area has a breadcrumb trail 'Home > Schedule your vaccination'. A title 'Schedule your vaccination' is followed by a subtitle: 'Start by choosing the vaccine you'd like to receive, and then choose a site and time.' A 'Choose a vaccine' section contains a note: 'You can get multiple vaccines in a single appointment at certain sites' and two buttons: 'COVID-19' and 'Flu vaccination'. Below this is a 'Choose a site' section with 'State' and 'City' dropdown menus, both currently set to '-- None --'. The entire interface is clean with a white background and light gray accents.

Schedule and manage your vaccines in the Patient Portal (continued)

View all of your upcoming appointments.

The screenshot shows the ServiceNow Patient Portal interface. At the top, there's a dark header with the word "now" in white. Below it is a blue navigation bar with "Appointments" and "Vaccinations" tabs. The main content area has a light gray background. At the top left of this area, it says "Home > Appointments". Below that is a section titled "Appointments" with two tabs: "Upcoming" (which is underlined in blue) and "Past". Under the "Upcoming" tab, there are two entries:

- 2022-01-11 08:30:00**
COVID-19 - First dose and Flu vaccination - Annual dose
Santa Clara County Fairgrounds Expo Hall, 344 Tully Rd, San Jose, CA, 95111
- 2022-02-01 13:00:00**
COVID-19 - Second dose
Stanford Hospital and Clinics, 300 Pasteur Drive, Stanford, CA, 94305

Schedule and manage your vaccines in the Patient Portal (continued)

View the details of an individual appointment.

You can also:

- Reschedule an appointment

i Note: If your first appointment has been completed for a multiple-dose vaccination program, you cannot change the method. However, you have the flexibility to change the method while rescheduling your first dose. If you change the method while rescheduling your appointment, it automatically applies to subsequent doses.

- Choose different locations for multiple appointments
- Cancel an appointment

i Note: If you cancel an appointment, all of your open appointments for that vaccination program are canceled. For example, if you cancel the second appointment of a three-dose vaccination program, then both the second and third appointment are canceled.

now

Appointments Vaccinations

Home > Appointments > Appointment details

2022-01-11 08:30:00

Reason: COVID-19 - First dose and Flu vaccination - Annual dose **Appointment code:** JB6Y20MTWG **Location:** Santa Clara County Fairgrounds, Expo Hall, 344 Tully Rd, San Jose, CA 95111
Get Directions

Before you arrive

- Complete a required screening form the day before. You'll get an email with the details.
- Bring the form of identification you used to schedule this appointment.
- Bring a face mask.

Show this QR code when you check in at the site.

Provide any updates on your health

Provide updates on your health in the Patient Portal

Provide your health updates in the portal. Also, organizations have the option to send an appointment reminder and pre-appointment questionnaire to you at a specified time before the vaccination appointment.

The screenshot shows a web-based form titled "Pre-appointment questionnaire". At the top, it says "The vaccination site needs to screen everyone before their staff administer vaccines." Below this is a section titled "Pre-vaccination screening" containing three questions with radio button options:

- * Have you had a fever or felt ill in the past 48 hours?
○ Yes ○ No
- * Have you received any vaccinations in the past four weeks?
○ Yes ○ No
- * Are you pregnant or expecting to be pregnant during the next month?
○ Not Applicable ○ Yes
○ No

Below these questions is a text input field labeled "Any other comments?" followed by a large empty text area. At the bottom right of the form is a blue "Submit" button.

Using Clinician Portal to find and manage vaccination appointments for users

As a user with the sn_vaccine_sm.clinician role, you can find vaccination appointments for users, view all of their upcoming appointments for a particular location, view, and work on a vaccination record, mark an appointment as a no-show, cancel an appointment, and more, all from within a single portal.

Clinician portal

Vaccine Administration Management

System Administrator

Manage your appointments

Select a location to get started.

Berger Drive Auditorium



Appointment code ▾

Search



You can also use a QR code to find an appointment

Scan code



Jun 8, Tuesday

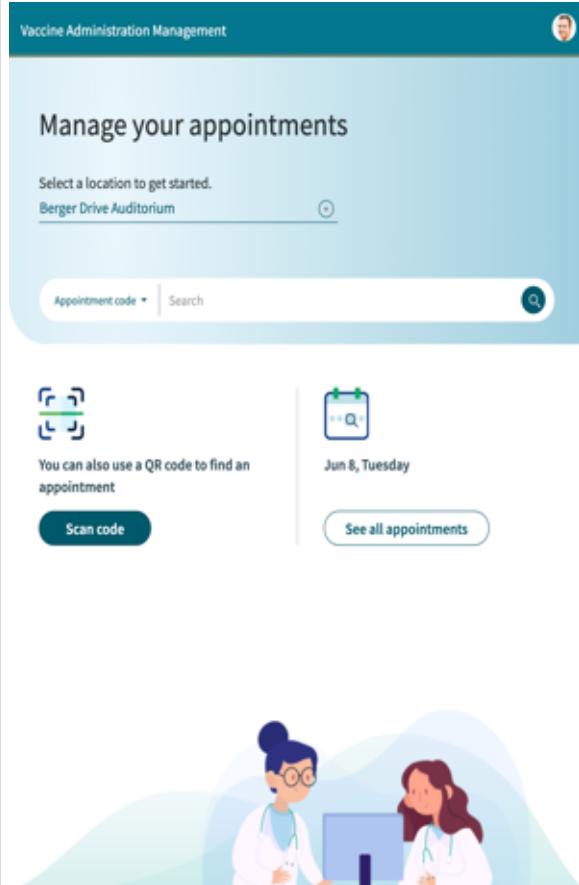
See all appointments



- Note:** The clinician portal is optimized for both tablet and mobile. However, the mobile view does not currently support the selection of more than one appointment at a time for bulk updates.

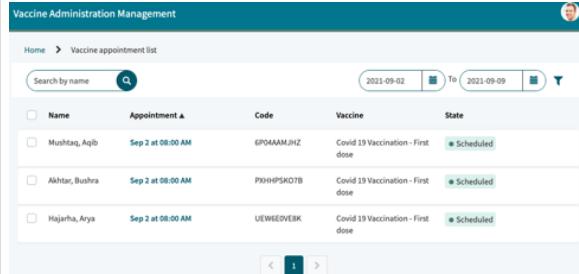
Find vaccination appointments

Screens of vaccination appointments

| Description | Screen |
|---|---|
| <p>Clinicians can find vaccination appointments by scanning the user's QR code, entering the code manually, or looking up the appointment in the portal.</p> <p>Clinicians can view the appointments for a particular location from the list. To view all upcoming appointments, click See all appointments. Upcoming appointments include all appointments for that day at the selected location, as well as appointments from the previous hour. For example, if the clinician views the upcoming appointments at 9:00 AM, they see all the assigned appointments from 8:00 AM through the end of the day.</p> <p>Once the clinician selects a location, it remains selected throughout the session.</p> |  |

View and search appointments

Screens of view and search appointments

| Description | Screen | | | | | | | | | | | | | | | | | | | | |
|--|---|------------|-----------------------------------|--|---------|-------|---------------|-------------------|-----------|-----------------------------------|--|----------------|-------------------|------------|----------------------------------|--|---------------|-------------------|------------|-----------------------------------|--|
| <p>From the list view, clinicians can view all appointments for a particular location, search for users by name, and filter for appointments. By default, the dates for appointment filters are set for a week's time.</p> <p>i Note: Using the search by name filter, clinicians can view only the appointments booked for the registered users. However, the clinician can still scan the QR code of an internal user and can administer the vaccine.</p> |  <p>The screenshot shows a table titled "Vaccine appointment list" under the "Vaccine Administration Management" header. The table has columns: Name, Appointment A, Code, Vaccine, and State. There are three rows of data:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Appointment A</th> <th>Code</th> <th>Vaccine</th> <th>State</th> </tr> </thead> <tbody> <tr> <td>Mushtaq, Aqib</td> <td>Sep 2 at 08:00 AM</td> <td>GPOAAMJHZ</td> <td>Covid 19 Vaccination - First dose</td> <td>● Scheduled</td> </tr> <tr> <td>Akhtar, Bushra</td> <td>Sep 2 at 08:00 AM</td> <td>PXHHPSKOTB</td> <td>Covid 19 Vaccination- First dose</td> <td>● Scheduled</td> </tr> <tr> <td>Hajarha, Arya</td> <td>Sep 2 at 08:00 AM</td> <td>UEW6E0VEBK</td> <td>Covid 19 Vaccination - First dose</td> <td>● Scheduled</td> </tr> </tbody> </table> | Name | Appointment A | Code | Vaccine | State | Mushtaq, Aqib | Sep 2 at 08:00 AM | GPOAAMJHZ | Covid 19 Vaccination - First dose | ● Scheduled | Akhtar, Bushra | Sep 2 at 08:00 AM | PXHHPSKOTB | Covid 19 Vaccination- First dose | ● Scheduled | Hajarha, Arya | Sep 2 at 08:00 AM | UEW6E0VEBK | Covid 19 Vaccination - First dose | ● Scheduled |
| Name | Appointment A | Code | Vaccine | State | | | | | | | | | | | | | | | | | |
| Mushtaq, Aqib | Sep 2 at 08:00 AM | GPOAAMJHZ | Covid 19 Vaccination - First dose | ● Scheduled | | | | | | | | | | | | | | | | | |
| Akhtar, Bushra | Sep 2 at 08:00 AM | PXHHPSKOTB | Covid 19 Vaccination- First dose | ● Scheduled | | | | | | | | | | | | | | | | | |
| Hajarha, Arya | Sep 2 at 08:00 AM | UEW6E0VEBK | Covid 19 Vaccination - First dose | ● Scheduled | | | | | | | | | | | | | | | | | |

View and work on an appointment

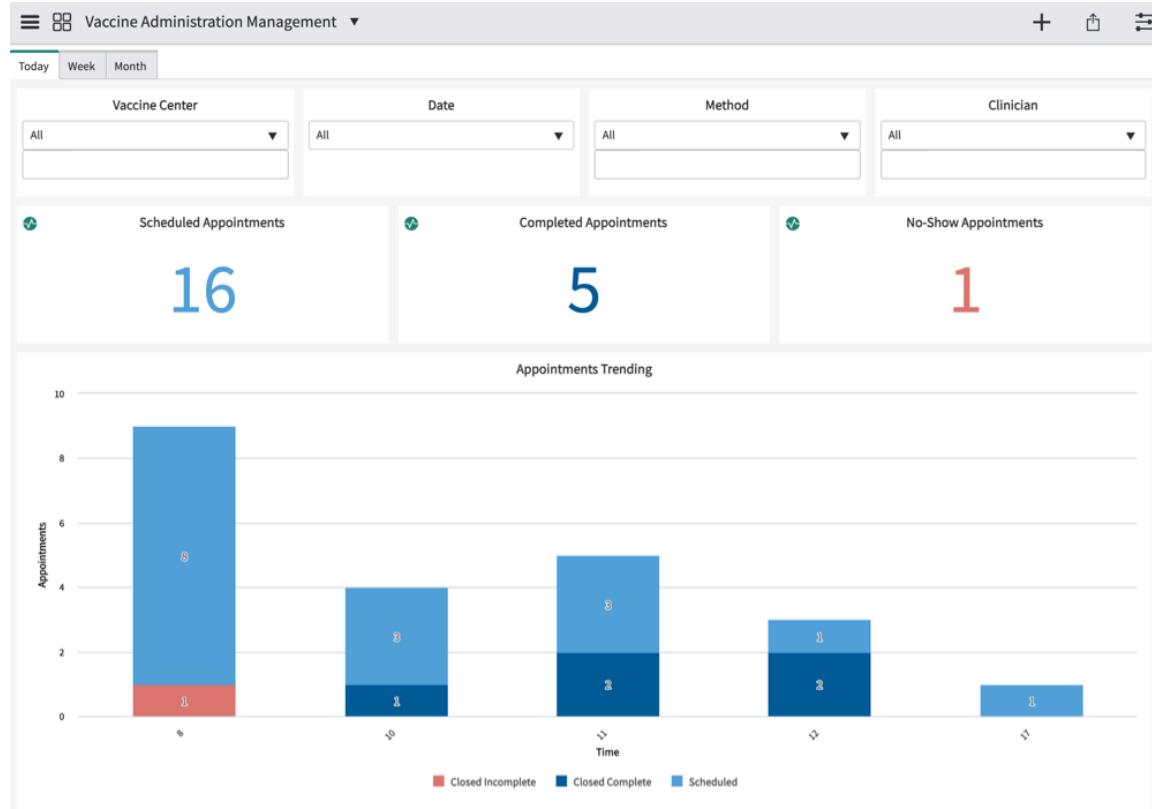
Screens of view and work on an appointment

| Description | Screen |
|---|--------------|
| <p>Clinicians can view and work on an appointment record, including:</p> <ul style="list-style-type: none"> • Verify the user's ID • Verify the user's details • Fill in screening questions • Verify that the vaccine is administered properly. <p>If there are multiple vaccines booked under the same appointment and if the clinician has administered only one, details can still be captured by the clinician. Later, the user can book the vaccine that was not administered.</p> <ul style="list-style-type: none"> • Provide comments and work notes • Verify that the user has verbally consented to the vaccine • Verify that the user was provided with information about the vaccine • Assign an appointment to oneself • Mark an appointment as a no-show • Cancel an appointment • Mark an appointment as complete <p>i Note: When the clinician marks a vaccination appointment as complete, an immunization record creates for the user and stores on the Immunization (sn_hcls_immunization) table.</p> | |

Vaccine Administration Management dashboard

Use the Vaccine Administration Management dashboard to view vaccine appointments by day, week, and month. You can view scheduled, completed, and no-show appointments, as well as filter appointments by the vaccine center, date, method, and clinician.

Vaccine Administration Management dashboard



Required Now Platform roles

- The sn_vaccine_sm.report_manager role is required to view and edit the dashboard and reports.
- The sn_vaccine_sm.report_viewer role is required to view the dashboard and reports.

Access the Vaccine Administration Management dashboard

To open the dashboard, navigate to **Vaccine Administration Management > Dashboard**.

Use cases

For examples of how different people in your organization would use this dashboard, see these use cases.

Use cases of Vaccine Administration Management dashboard

| User | Dashboard use |
|---|--|
| Vaccine Administration Management dashboard manager | Can view and edit the Vaccine Administration Management dashboard. |

Use cases of Vaccine Administration Management dashboard (continued)

| User | Dashboard use |
|--|---|
| Vaccine Administration Management dashboard viewer | Can view the Vaccine Administration Management dashboard. |

Reports

Reports of Vaccine Administration Management

| Title | Type | Source table | Description |
|------------------------|---|---------------------------------------|--|
| Scheduled Appointments | Single Score  | Vaccination Task [sn_vaccine_sm_task] | Number of scheduled appointments. |
| Completed Appointments | Single Score  | Vaccination Task [sn_vaccine_sm_task] | Number of completed appointments. |
| No-Show Appointments | Single Score  | Vaccination Task [sn_vaccine_sm_task] | Number of users who fail to turn up to the scheduled appointments. |
| Appointments Trending | Column  | Vaccination Task [sn_vaccine_sm_task] | Segregation of number of scheduled, completed, and no-show appointments. |

Filters

Filters of Vaccine Administration Management

| Name | Filter type | UI control type | Description |
|----------------|-------------|-----------------------|---|
| Vaccine Center | Reference | Select Multiple Input | Filter the report results based on the selected vaccine center. |
| Date | Date | Select Single Input | Filter the report results based on the selected date. |

Filters of Vaccine Administration Management (continued)

| Name | Filter type | UI control type | Description |
|-----------|-------------|-----------------------|---|
| Method | Reference | Select Multiple Input | Filter the report results based on the selected vaccine method. |
| Clinician | Reference | Select Multiple Input | Filter the report results based on the selected clinician. |

Manage user appointments as a clinician or a vaccine agent

Manage user appointments as a clinician or as a vaccine agent for creating consumer users, booking vaccination appointments, and choosing a desired slot. To better manage user appointments, some additional configurations are performed for the vaccine agent.

Search user records

Search for a user record to check if the user record exists, before creating consumer users.

Before you begin

Role required: sn_vaccine_sm.clinician

Procedure

1. Navigate to **All > Vaccine Administration Management > Agent > Search Assist**.
2. Select **Consumer**.
3. Search for the consumer record using the search options provided such as first name, last name, and phone, and click **Search**.
If the user record exists, you can find the user record under Personal information.

i Note: Records of internal users who have provided personal information through the Vaccine Administration Management portal will be included in the search results. However, a clinician or a vaccine agent will not be able to book appointments on behalf of the internal users.

Create consumer users

Clinicians and vaccine agents can create consumer records using the Vaccine Administration Management application.

Before you begin

i Note: A clinician or a vaccine agent cannot create internal users and then book appointments on behalf of the users.

Role required: sn_vaccine_sm.clinician

Procedure

1. Navigate to **All > Vaccine Administration Management > Agent > Search Assist**.
2. Click **Create User**.

3. Provide the user's personal information to help organizations determine the eligibility for appointment scheduling.

If the user has taken the first dose of the vaccine outside of the Vaccine Administration Management application, indicate the vaccination method and the date that the user received the first dose of the vaccine.

4. Click **Submit**.

A new information record for the consumer user is created and links to a corresponding patient record, if one exists for the user. The vaccination can be scheduled on behalf of the user. If a patient record does not exist for the user, a new patient record is created and links to the user's information and consumer record.

Search existing appointments

Search for an existing appointment on behalf of the consumer user.

Before you begin

Role required: sn_vaccine_sm.clinician

Procedure

1. Navigate to **All > Vaccine Administration Management > Agent > Search Assist**.
2. Select **Appointment**.
3. Search for the vaccination appointments using the appointment code or contact.
4. Click **Search**.

If the vaccination record exists, you can find it under Vaccination Tasks.

Note: As a clinician or as a vaccine agent, you can search for an existing appointment using the contact filter only for consumer users and not for internal users. If you want to search for an existing appointment for an internal user, you must navigate to Vaccination Tasks and filter the list by the user name.

Schedule an appointment

Schedule vaccination appointments on behalf of the consumer user.

Before you begin

Note: A clinician or a vaccine agent cannot create an appointment on behalf of internal users.

Role required: sn_vaccine_sm.clinician

Procedure

1. Navigate to **All > Vaccine Administration Management > Agent > Search Assist**.
2. Select **Consumer**.
3. Search for the new consumer user record using the search options provided such as first name, last name, and phone, and click **Search**.
You can find the new information record under Personal information.
4. Select the record to book an appointment.
5. From the consumer user record, select **Book Vaccine Appointment**.
The **Book Vaccine Appointment** button is not visible for the internal user.
6. Schedule the vaccination appointments by choosing your preferred method and site for vaccination.

You can either choose the same vaccination site for both doses, or you can choose a different vaccination site for each dose. To choose from your preferred vaccination method while scheduling or rescheduling your appointments, the `sn_vaccine_sm.allow_user_selection_of_vaccine_method` system property value must be set to **true**. For details on how to configure multi-vaccine appointment bookings, see [Multi-vaccine appointment bookings configuration](#).

7. Fill in the required details, and click **Submit**.

The vaccination appointment is scheduled for the user and separate emails for both vaccination appointments are shared with the user.

8. Click **Close**.

In the Appointment related list, two separate vaccination tasks are created.

Cancel existing appointments

Cancel existing appointments on behalf of the consumer user.

Before you begin

Role required: `sn_vaccine_sm.clinician`

Procedure

1. Navigate to **All > Vaccine Administration Management > Agent > Search Assist**.

2. Select **Appointment**.

3. Search for the vaccination appointments using the appointment code or contact, and click **Search**.

You can find the vaccination records under Vaccination Tasks.

4. Select the user record that you want to cancel, and click **Cancel Appointment**.

What to do next

[Reschedule existing appointments](#).

Reschedule existing appointments

Reschedule existing appointments and choose the preferred method, date, time slot, or vaccination center.

Before you begin

Role required: `sn_vaccine_sm.clinician`

Procedure

1. Navigate to **All > Vaccine Administration Management > Agent > Search Assist**.

2. Select **Appointment**.

3. Search for the vaccination appointments using the appointment code or contact, and click **Search**.

You can find the vaccination records under Vaccination Tasks.

4. Select the user record that you want to reschedule, and click **Reschedule Appointment**.

5. In the Reschedule Appointment pop-up window, select a vaccination center, date, and appointment time slot, and click **Submit**.

The Reschedule Appointment pop-up window displays the confirmation of the scheduled appointment.

What to do next

As a user with the sn_vaccine_sm.clinician role, you can also perform the following actions on behalf of the users.

- **Delete**
- **Update**
- **Mark as complete**
- **Mark as no-show**

Domain separation and Vaccine Administration Management

Domain separation is supported for Vaccine Administration Management. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see [Application support for domain separation](#).

Overview

The Vaccine Administration Management application includes domain separation for transactional data like vaccination programs and vaccination appointments. The application is based on the [Healthcare and Life Sciences data model](#) that also includes domain separation.

How domain separation works in Vaccine Administration Management

For customers using the Vaccine Administration Management application to register for vaccination programs and book appointments, the domain is set from the logged-in user's session, in the record created, and the associated healthcare data.

Use cases

When healthcare providers have their healthcare data separated by domains, the healthcare requests and corresponding fulfillment tasks are associated with the respective customer domains.

Redox Inbound Integration

With the ServiceNow® Redox Inbound Integration application, use the real-time bidirectional data exchange with external healthcare systems via the Redox platform.

Request apps on the Store

Visit the [ServiceNow Store](#)  website to view all the available apps and for information about submitting requests to the store. For cumulative release notes information for all released apps, see the [ServiceNow Store version history release notes](#) .

| | |
|---|---|
| <p>Explore</p>  <p>Learn about how healthcare organizations use Redox Inbound Integration.</p> | <p>Configure</p>  <p>Plan and configure your implementation.</p> |
| <p>Exchange data</p>  <p>Exchange real-time data between different healthcare systems.</p> | <p>Reference</p>  <p>Get details about supported data models and event types.</p> |

Exploring Redox Inbound Integration

Whether you're starting or expanding the implementation of the Redox Inbound Integration application, consider learning more about the app used for integration with a healthcare system via the Redox platform.

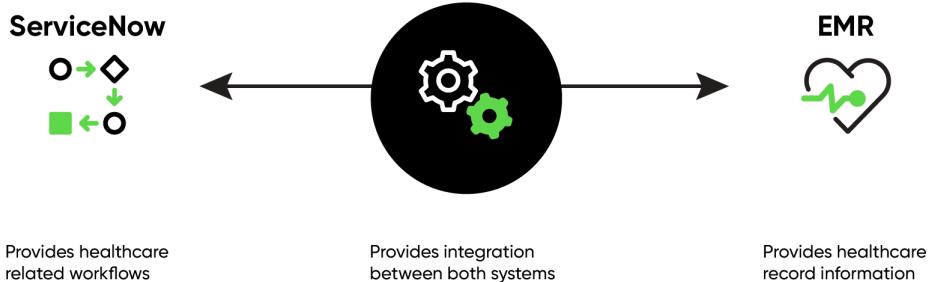
Overview

As a hospital, payer (insurance), or a life sciences organization, you can unlock the care capacity of multiple healthcare systems by enabling bidirectional integrations between them by using the Redox Inbound Integration application. You can improve inbound and proactive outbound service scalability and capabilities by using the application to integrate with healthcare systems that use the Redox platform.

Redox Inbound Integration

The following example shows the Redox Inbound Integration workflow.

Redox Inbound Integration



Benefits

Redox Inbound Integration provides the following benefits:

Redox Inbound Integration benefits

| Benefit | Key feature | Role |
|--|---|-------------------------|
| Enables healthcare systems including electronic medical records (EMR) systems and electronic health records (EHR) systems to integrate with the ServiceNow Healthcare and Life Sciences data model that is based on the Health Insurance Portability and Accountability Act (HIPAA) and the Health Level Seven International (HL7) industry standards while avoiding the cost and complexity of implementing point-to-point integrations by enabling bidirectional integration between multiple EMR systems and a ServiceNow instance. | Exchange real-time healthcare data with Redox Inbound Integration | Administrator/Clinician |

To get started with the Redox Inbound Integration application, see [Configuring Redox Inbound Integration](#).

Configuring Redox Inbound Integration

Link your Redox engine with your ServiceNow instance to retrieve information from a healthcare system that uses the Redox platform.

Configuration tasks for using the Redox Inbound Integration application.

1. Install the Redox Inbound Integration application on your ServiceNow instance.
2. Link your ServiceNow instance with your Redox account.
3. Configure the external Redox healthcare system as a source system for Redox Inbound Integration.
4. Create a user for Redox Inbound Integration.
5. Assign roles for Redox Inbound Integration users.
6. Configure your ServiceNow instance credentials in the Redox engine.

Install Redox Inbound Integration

You can install the Redox Inbound Integration application (sn_redox) if you have the admin role.

Before you begin

- Ensure that the application and all of its associated ServiceNow Store applications have valid ServiceNow entitlements. For more information, see [Get entitlement for a ServiceNow product or application](#).
- Review the [Redox Inbound Integration](#) application listing in the ServiceNow Store for information on dependencies, licensing or subscription requirements, and release compatibility.

Role required: admin

Procedure

1. Navigate to **All > System Applications > All Available Applications > All**.
2. Find the Redox Inbound Integration application (sn_redox) using the filter criteria and search bar.

You can search for the application by its name or ID. If you cannot find the application, you might have to request it from the ServiceNow Store.

In the list next to the **Install** button, the versions that are available to you are displayed.

3. Select a version from the list and select **Install**.

In the Install dialog box that is displayed, any dependencies that are installed along with your application are listed.

4. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
5. Optional: If demo data is available and you want to install it, select the **Load demo data** check box.
Demo data comprises the sample records that describe application features for the common use cases. Load the demo data when you first install the application on a development or test instance.



Important: If you don't load the demo data during installation, it's unavailable to load later.

6. Select **Install**.

Link your ServiceNow instance with your Redox account

Create an OAuth application endpoint for the external Redox healthcare system to access your ServiceNow instance.

Before you begin

Ensure that the application scope is set to Redox Inbound Integration by using the application picker. For more information, see [Application picker](#).

Role required: sn_hcls.admin or admin

Procedure

1. Navigate to **All > System OAuth > Application Registry**.
2. In the Application Registries list, click **New**.
3. On the OAuth application page, select **Create an OAuth API endpoint for external clients**.
4. On the Application Registries form, fill in the Redox healthcare system details including the name, client ID, accessible from, client secret, accessible from, refresh token lifespan, and access token lifespan.

Note: You can ignore the **Redirect URL** and **Logo URL** fields, which are not used for this configuration.

For more information, see [Create an endpoint for clients to access the instance](#).

5. Click **Submit**.

Configure the external Redox healthcare system as a source system for Redox Inbound Integration

Enable the Redox Inbound Integration application to receive data from the external Redox healthcare system by configuring the source and destination IDs of the system in your ServiceNow instance.

Before you begin

Role required: admin

Procedure

Configure the Source system [sn_hcls_source_system] table to receive data from an external Redox healthcare system by using the Redox Inbound Integration application.

For more information, see [Configure an external Redox healthcare system as a source system for a custom integration](#).

Create a user for Redox Inbound Integration

Create a user for the Redox Inbound Integration application to receive data from a Redox healthcare system.

Before you begin

Role required: admin

Procedure

1. Navigate to **All > User Administration > Users**.
2. In the Users list, click **New**.
3. On the User form, fill in the details of the user including ID, first and last names, calendar integration, and time zone.

4. In the **Password** field, enter a password for the user.
This password can be permanent or temporary.
5. Optional: Enable the user to change the password during the first login by selecting the **Password needs reset** check box.
6. Select the **Active** check box.
7. To designate this user as a non-interactive user, select the **Web service access only** check box.
8. Click **Submit**.

What to do next

[Assign roles for Redox Inbound Integration users.](#)

Related topics

[Create a user](#)

Assign roles for Redox Inbound Integration users

Assign roles to control access to features, capabilities, and data in the Redox Inbound Integration application.

Before you begin

- Set the application scope to Redox Inbound Integration using the application picker. For more information, see [Application picker](#).
- [Create a user for Redox Inbound Integration](#).

Role required: sn_hcls.admin or admin

About this task

Users with the roles listed in the following table can use the Redox Inbound Integration application.

Roles required for Redox Inbound Integration

| Role | Description |
|---------------|---|
| sn_hcls.admin | Administers who can access the Redox Inbound Integration application. |

Procedure

Assign the sn_hcls.admin role to the user for the Redox Inbound Integration application. For more information, see [Assign a role to a user](#).

Configuring credentials in the Redox engine for sending requests to a ServiceNow instance

You configure your ServiceNow instance credentials in the Redox engine for sending requests to a ServiceNow instance.

As a Redox administrator, configure your ServiceNow instance credentials in the Redox engine to send requests to a ServiceNow instance. For more information, see the [Redox documentation](#).

- Note:** To send requests to a ServiceNow instance from the Redox engine, ensure that you enter the REST API URL in the following format: `https://<instance name>/api/sn_redox/v1/redox_webhook_callbacks`.

In the Redox engine, a request is determined by the event type and workflow setup for your integration. For more information, see [Supported data models and event types for Redox Inbound Integration](#).

Exchange real-time healthcare data with Redox Inbound Integration

Use the Redox Inbound Integration application to easily exchange real-time data between different healthcare systems. Exchange data without depending on how individual healthcare systems store and transmit healthcare data.

As a user with the sn_hcls.admin role, you can receive and update healthcare data from an external healthcare system in a ServiceNow instance for the following tasks:

Scheduling

Notify external healthcare systems of new appointments and changes to existing appointments.

Medication

Provide insights into current and historical medication use for a patient. Allow real-time notification of new prescriptions and modifications or cancellations to existing ones.

Patient administration

Provide real-time feed including patient tracking and registration based on admission, discharge, and transfer (ADT) process in a healthcare system.

Providers

Send provider information such as demographics, qualifications, and roles.

Claims

Provide claim transaction information on services provided between payers and providers.

Clinical Summary

View snapshots of patient's charts at moments in time.

For a full list of supported Redox data models, see [Supported data models and event types for Redox Inbound Integration](#).

In addition, you can also use the [Redox Electronic Health Record Spoke](#) to send and update healthcare data from an external healthcare system. For more information, see [Redox Electronic Health Record Spoke](#).

Redox Inbound Integration reference

Reference topics provide additional information about the supported data models and event types for Redox Inbound Integration.

Supported data models and event types for Redox Inbound Integration

In the Redox engine, a request is determined by the event type and workflow set up for your integration.

The following table shows a list of event types in the Redox data models that are supported by the Redox Inbound Integration application.

Redox data models and event types supported by the Redox Inbound Integration application

| Data model | Event type |
|------------------|----------------|
| Clinical Summary | Patient Push |
| | Visit Push |
| Claim | Submission |
| | Payment |
| Provider | New |
| | Update |
| | Activate |
| | Deactivate |
| Medications | Administration |
| | New |
| | Update |
| | Cancel |
| PatientAdmin | NewPatient |
| | PatientUpdate |
| | Arrival |
| | Cancel |
| | Discharge |
| | PreAdmit |

Redox data models and event types supported by the Redox Inbound Integration application (continued)

| Data model | Event type |
|--------------------|--------------|
| | Registration |
| Scheduling | New |
| | Reschedule |
| | Modification |
| | Cancel |
| | NoShow |
| SurgicalScheduling | New |
| | Reschedule |
| | Modification |
| | Cancel |
| | NoShow |

For information on the Redox data models, see [Event types for data models](#) in [Redox documentation](#).