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Zurich 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.

Healthcare and Life Sciences Service Management	Clinical Device Management	Healthcare Operations
		
Streamline patient workflows with playbooks and case management.	Optimize the management and maintenance of medical devices.	Enable care teams to focus on patient care.

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.

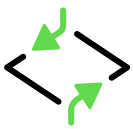
Healthcare and Life Sciences Service Management Core

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.

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Request apps on the Store

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

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.

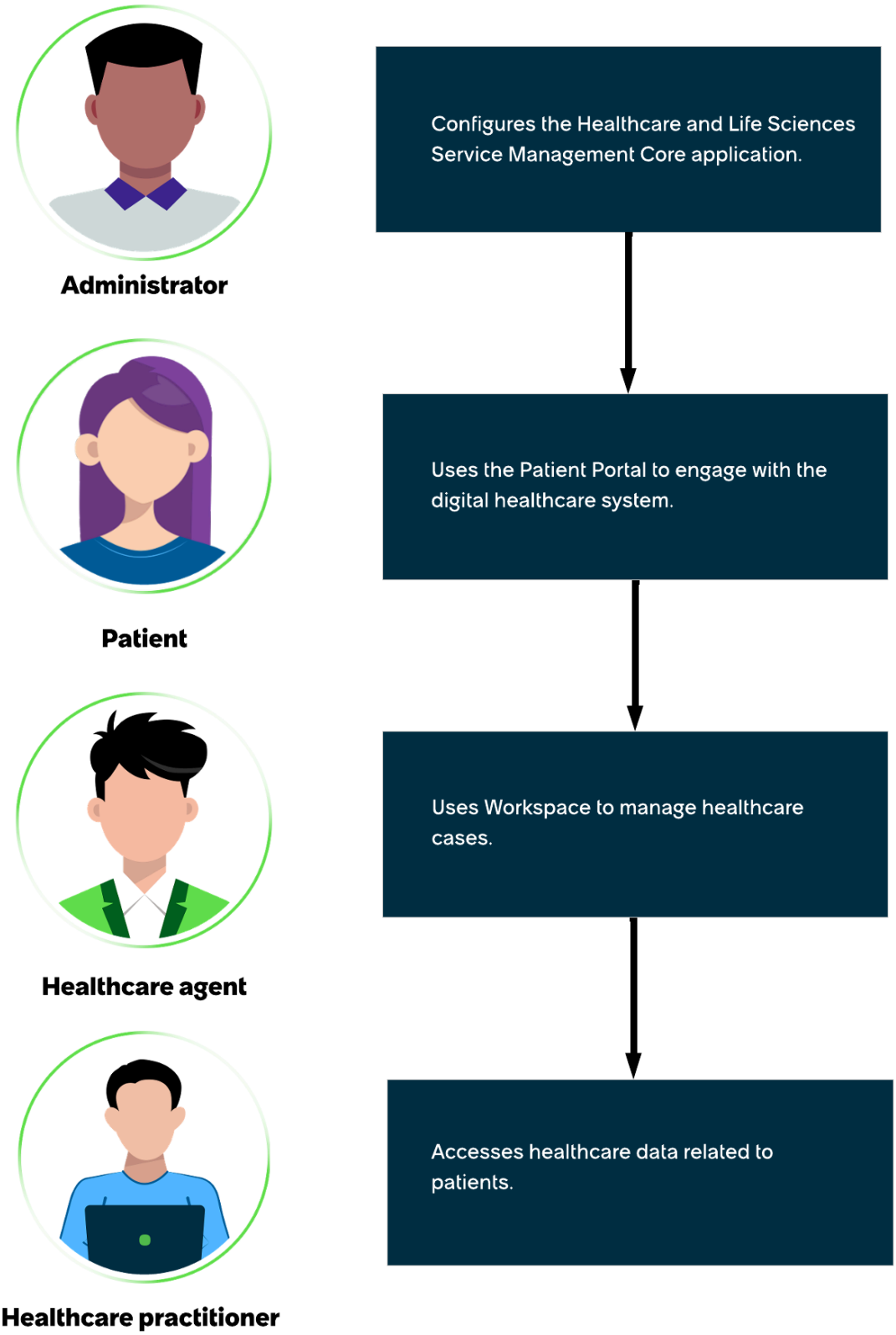
Healthcare and Life Sciences Service Management Core Overview

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.

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Healthcare and Life Sciences Service Management Core workflow



In the Healthcare and Life Sciences Service Management Core workflow:

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1. An administrator configures the Healthcare and Life Sciences Service Management Core application.
2. A patient uses the Patient Portal to engage with the digital healthcare system.
3. A healthcare agent uses Workspace to manage healthcare cases.
4. A healthcare practitioner accesses healthcare data related to patients.

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.	Use the Patient Portal for Healthcare and Life Sciences Service Management	Patient
Get a 360-degree view of patient or member information.	View patient information in Workspace	Agent
Digitize the generation of healthcare documents and consents by using built-in digital document templates.	Configure 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.	Manage healthcare 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.

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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.	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. **Note:** No users, including users with the admin role, can delete data from the healthcare data tables.
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 an application.
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	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.

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

Task	Description
for completing healthcare-related tasks.	
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

- Confirm 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:

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- Roles
- Tables
- Plugins
- ServiceNow Store applications
- Business rules

The Healthcare and Life Sciences Service Management Core application is dependent on the Product Catalog Management Core, CIWF UI Components, and Industry Core applications.

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 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	• decision_table_admin • sn_doc.admin

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Healthcare and Life Sciences Service Management Core roles (continued)

Role	Description	Contains roles
	Healthcare and Life Sciences applications.	• 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
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.	• 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.	• 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.	• 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

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Healthcare and Life Sciences Service Management Core roles (continued)

Role	Description	Contains roles
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.	• 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 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. Can view and edit the CSM Households table, Member Plan table, Pre-authorization Request table, and all clinical tables. Can create household members and pre-auth requests.	• canvas_user • sn_customerservice.csm_workspace_us • sn_customerservice.customer_data_viev • 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	• canvas_user • model_manager • sn_customerservice.csm_workspace_us

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Healthcare and Life Sciences Service Management Core roles (continued)

Role	Description	Contains roles
	instance. In addition, creates and manages accounts, contact, account relationships, contact relationships, and account consumer relationships.	• sn_customerservice.customer_data_view • 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 • sn_hcls.revenue_cycle_data_writer • sn_previsit.patient_service_agent
sn_hcls.patient	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. Household members and addresses associated with a patient are maintained by using the Household Member [csm_household_member] and Location [cmn_location] tables, respectively. Location is associated with the foundation domain in the Common Service Data Model (CSDM).	• 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

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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). Creates Medication Prescriptions. Create Immunizations.	• sn_customerservice.customer_data_viev • 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 ServiceNow AI 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.

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Setting up healthcare locations and healthcare organizations

Understand how healthcare locations and healthcare organizations function and should be organized to set up your care teams and the physical locations they operate in correctly.

Healthcare organizations

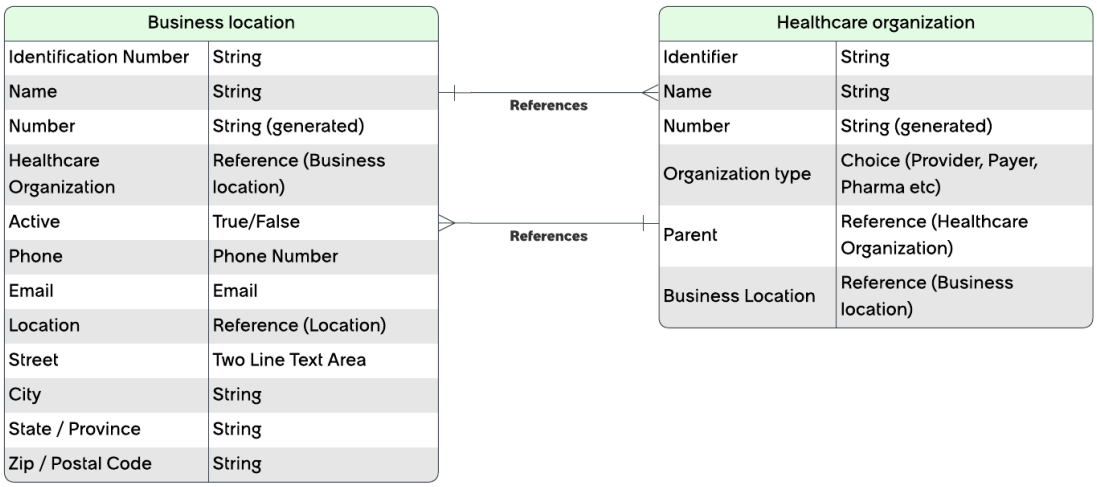
The **healthcare organization** [sn_hcls_organization] table stores the details of a healthcare organization in your ServiceNow instance. It's the authoritative reference for defining the organization hierarchy within a healthcare delivery network, capturing the structure that supports operations like access control, visibility, and routing.

An example healthcare organization hierarchy might look like:

HQ → Hospital → Department → Unit

Structuring healthcare organizations correctly is vital to healthcare operations as it defines the organizational structure, influencing visibility, responsibility, and routing.

Healthcare organization [sn_hcls_organization] table technical details



When a healthcare organization is created, an associated business location is also created with the same name that references the healthcare organization. A bidirectional reference exists between the two tables. A business location is an extension of a service organization.

A healthcare organization is associated with a business location, either internal or external.

It contains specific attributes not found in the service organization table. For example, organization type.

Use the **parent organization** field to create multi-level hierarchies by labeling healthcare organizations as parent to other healthcare organizations.

The **healthcare organization location association** table is used to store the explicit link between healthcare locations and their owning healthcare organization.

For information on the fields present in the Healthcare organization table, see Healthcare organization table.

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Healthcare locations

The **healthcare location** [sn_hcls_location] table represents the physical or virtual places where care and operational work occur — campuses, buildings, wings, units, rooms, and other serviceable spaces.

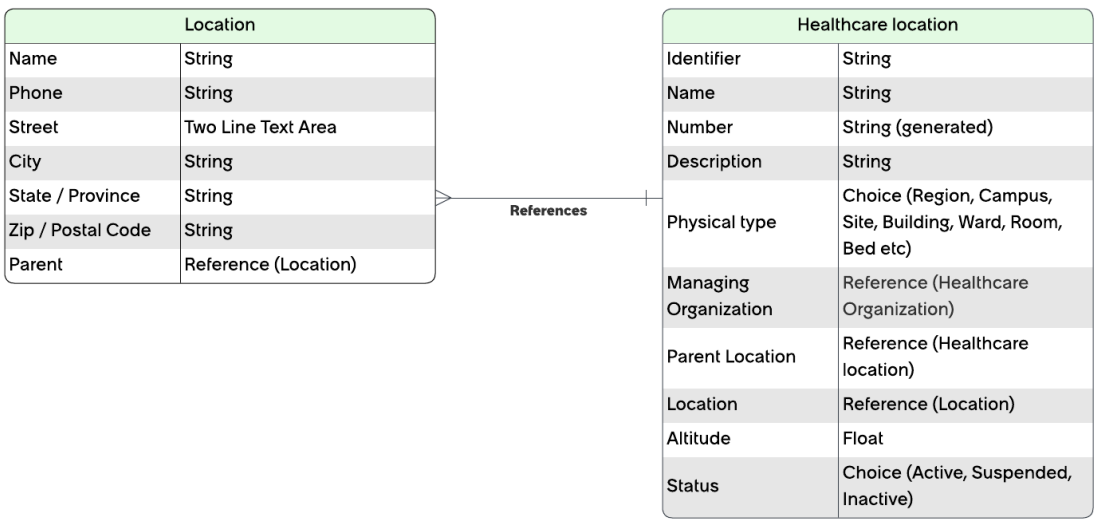
An example healthcare location hierarchy might look like:

Campus → **Hospital Building** → **Pediatrics Wing** → **PICU Unit** → **Bed** or **Room**

Structuring healthcare locations correctly enables agents and care teams to reference the precise location of issues. For example, an IT support agent can identify what room in the PICU unit has a broken monitor that needs repair.

By tying work to a specific location, ambiguity is reduced in requests and escalations, enabling for more efficient responses from care teams.

Healthcare location [sn_hcls_location] table technical details



The healthcare location table provides the ability to map common locations to healthcare organizations.

The common location [cmn_location] table provides the basis for location setup across the ServiceNow platform. Healthcare locations leverage common locations to extend the existing data into the HCLS data model.

Healthcare locations enable you to add attributes that aren't available in the common location table. For example, the altitude field is available in healthcare locations without being added to all common locations.

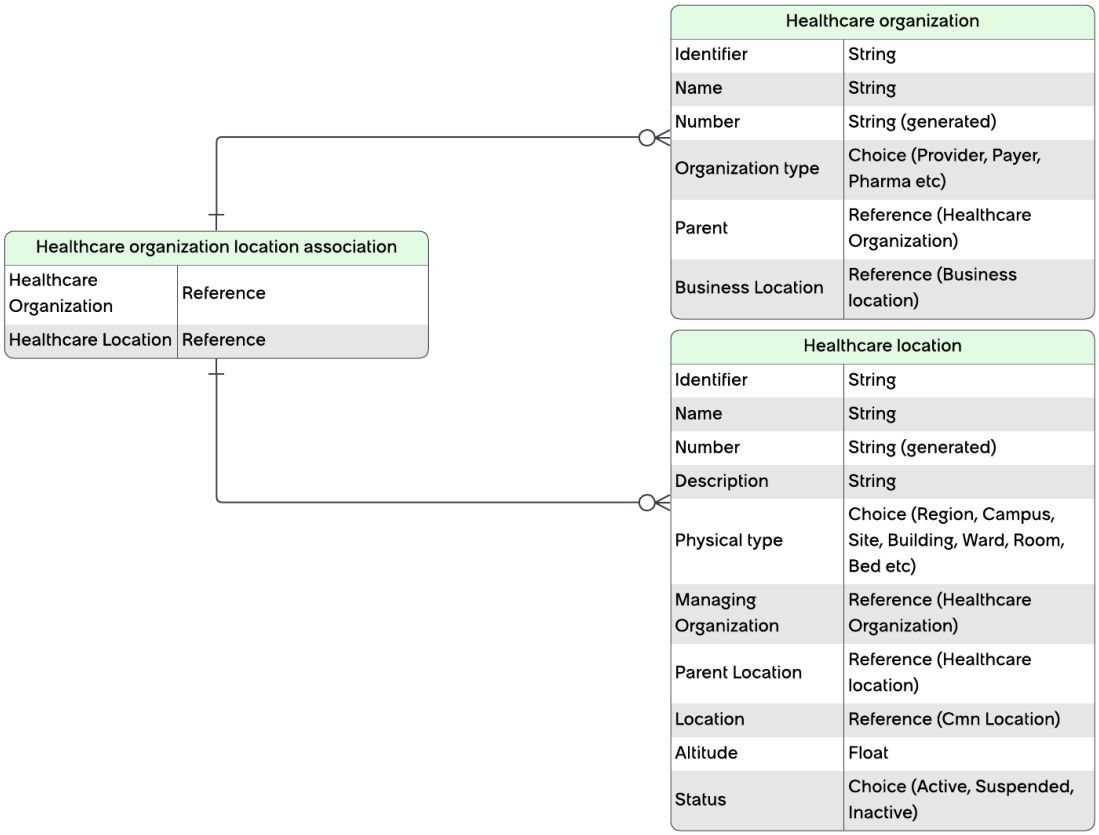
The **healthcare organization location association** table limits the common locations shown to care team members when reporting issues, displaying only those that their unit is responsible for. This table is used to store the explicit link between healthcare locations and their owning healthcare organization.

Use the **Parent location** field to create multi-level hierarchies by labeling healthcare locations as parent to other healthcare locations.

For information on the fields present in the Healthcare location table, see Healthcare location table.

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Associating healthcare locations and healthcare organizations



The **healthcare organization location association** table [sn_hcls_organization_location_association] establishes a definitive connection between healthcare organizations and healthcare locations. This connection determines the healthcare organization responsible for a particular location.

Healthcare locations define which common locations a healthcare organization is responsible for. When a member of a care team unit goes to report an issue, they're presented with a limited list of common locations that their unit is responsible for. This eliminates the need to sift through all available common locations in the system.

When creating a healthcare organization or a healthcare location, you can use this table to associate a healthcare location with a healthcare organization (or vice versa).

For more information on this process, see Associate healthcare locations with a healthcare organizations

How to set up healthcare organizations and healthcare locations

To create healthcare locations and healthcare organizations, see the following topics.

1. Create a healthcare location
2. Create a healthcare organization
3. Associate healthcare locations with a healthcare organizations

Create a healthcare organization

Create a healthcare organization for use with Healthcare and Life Sciences Service Management Core.

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Before you begin
Role required: admin

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

When a healthcare organization is created, an associated business location is also created with the same name that references the healthcare organization.

For more information, see Setting up healthcare locations and healthcare organizations and Healthcare organization table.

Procedure
1. Navigate to **All** > **HCLS Service Management** > **Organization data** > **Healthcare organizations**.
2. Select **New**.
3. Fill in the following fields.

Field	Description
Name	The name of your healthcare organization.
Organization type	Type of healthcare organization you represent. The following types are available by default: ○ Clinical research sponsor ○ Community group ○ Educational institute ○ Government ○ Healthcare provider ○ Hospital department ○ Non-healthcare business ○ Organizational team ○ Other ○ Payer

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Field	Description
	○ Pharmaceutical company ○ Religious institution For more information about the available organization types, see organization types defined in the FHIR specifications.
Parent organization	Parent organization associated with the organization.
Phone	Phone number of the organization.
Email	Email address associated with the organization.
Description	A description of this healthcare organization.
This is an internal location	Indicates whether this organization is considered an internal location.
Common location	The associated common location.

4. Select **Save**.

Create a healthcare location

Create healthcare locations to designate the locations in which your care teams operate.

Before you begin

Role required: admin

About this task

Healthcare locations are the physical or virtual places where care and operational work occur—campuses, buildings, wings, units, rooms, and other serviceable spaces. .

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

For more information, see Setting up healthcare locations and healthcare organizations and Healthcare location table.

Procedure

1. Navigate to **All** > **HCLS Service Management** > **Organization data** > **Healthcare location**.
2. Select **New**.
3. Fill in the following fields.

Field	Description
Name	Name to identify the healthcare location.
Physical type	Physical form of the location.

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Field	Description
	The following types are available by default: ○ Area ○ Bed ○ Building ○ Cabinet ○ Corridor ○ Jurisdiction ○ Level ○ Room ○ Road ○ Site ○ Vehicle ○ Wing ○ Ward For more information about the available physical types, see location types defined in the FHIR specifications.
Parent location	The parent location of this healthcare location. Set your parent location to create a hierarchy of locations in which the current healthcare location is nested under that parent location. For more information, see Example - Organizing your healthcare locations.
Location	Physical location of this healthcare location. Entry selected here populates address fields.

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Field	Description
	Value here references the Common Location [cmn_location] table.
Latitude	Latitude of the absolute geographic location.
Longitude	Longitude of the absolute geographic location.
Altitude	Altitude of the absolute geographic location.
Status	Option to indicate whether the healthcare location is in use. The following statuses are available by default: ○ Active ○ Inactive ○ Suspended For more information about the available statuses, see location statuses defined in the FHIR specifications.
Street	Mailing street address of the physical location.
City	City in which the physical location is located.
State/Province	State or province in which the physical location is located.
Zip / Postal Code	ZIP or postal code for the physical location.
Phone	Phone number of the physical location.
Identifier	Unique identifier associated with this location.
Description	A description of this healthcare location.

4. Select **Submit**.

Associate healthcare locations with a healthcare organizations

Associate healthcare locations with healthcare organizations.

About this task

In scenarios where a healthcare location is being utilized by multiple healthcare organizations, you can associate those organizations with a location.

You can also associate multiple healthcare organizations with a healthcare location, or vice versa.

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For example, a single ICU room in a hospital might be used by multiple departments, such as cardiology and neurology. You would associate those departments (Healthcare organizations) with the ICU room (a Healthcare location) using the steps that follow.

For more information, see Setting up healthcare locations and healthcare organizations.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **HCLS Service Management** > **Organization data** > **Healthcare organizations**.
2. Select the Healthcare organization you want to associate with a healthcare location.
3. Navigate to the **Healthcare locations** related list.
4. Click **Edit**.
5. In the Collection panel, select the Healthcare locations you want added to this Healthcare organization and use the right arrow to move them into the Healthcare locations List for this organization.

   Note:
   To remove a location from an organization, simply use the left arrow to move the location from the Healthcare locations List into the Collection list.

6. Click **Save**.

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.

Healthcare and Life Sciences 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 ServiceNow AI Platform application.
- Tables that are from the Product Catalog Management Core application.

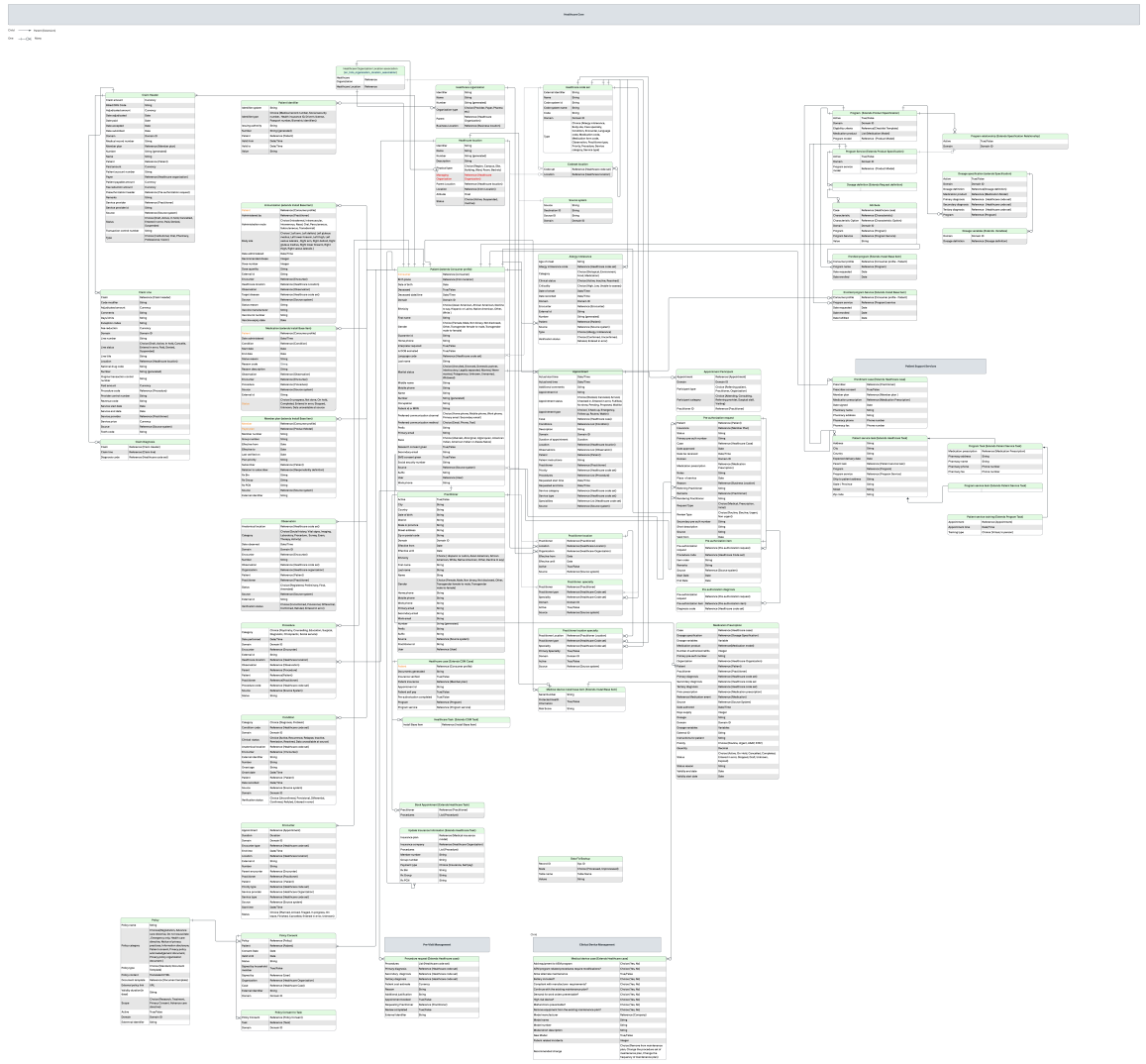
You can install the Healthcare and Life Sciences Service Management Core application to use only its data model for a basic configuration.

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.

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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.

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

Table	Description
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.
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

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

Table	Description
	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. **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 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.

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

Table	Description
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.
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 [sn_hcls_practitioner]	Stores the details of a practitioner in your healthcare organization.
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.

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

Table	Description
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.

ServiceNow AI 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 ServiceNow AI Platform, Customer Service Management (CSM), and Product Catalog Management Core applications to store data.

ServiceNow AI 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

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

Table	Description	Application
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
Consumer profile [sn_csm_consumer_profile]	Provides multiple consumer profiles.	CSM
Document template [sn_doc_template]	Provides document templates to generate standard letters or documents.	ServiceNow AI 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.	ServiceNow AI Platform
Medical insurance model [sn_ent_medical_insurance_model]	Classifies medical insurance models, including health insurance plans and government insurance programs such as Medicare or Medicaid.	Expanded Model and Asset Classes Store
Product Specification [sn_prd_pm_specification]	Defines, at a functional level, a product a service provider sells to the customer.	Product Catalog Management Core

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

Table	Description	Application
Request Definition [sn_ind_request_definition]	Associates a task type and a workflow with a request data table.	ServiceNow AI 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).	ServiceNow AI Platform
Specification [sn_prd_pm_specification]	Provides the base table for specifications included in the industry vertical applications.	Product Catalog Management Core
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.	ServiceNow AI Platform
Variables [var_dictionary]	Defines dynamic variables for a model used in an application form.	ServiceNow AI Platform

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Note:
To learn about ServiceNow AI Platform, CSM, and Product Catalog Management Core tables, see Industry data model tables, and Tables installed with Customer Service Management.

Healthcare and Life Sciences data model example

The Healthcare and Life Sciences data model is vital in managing patient information.

Before you begin
Role required: sn_hcls.healthcare_agent

About this task
Problem scenario: A healthcare organization is dedicated to enhancing patient satisfaction encounters common industry challenges. These hurdles involve a lack of alignment with crucial industry standards, including the Health Insurance Portability and Accountability Act (HIPAA), Fast Healthcare Interoperability Resources (FHIR), and Health Level Seven International (HL7). These disparities lead to duplication of efforts and a slow time to market.

Solution: To address these challenges, the healthcare organization recognizes the need for transformative solutions and subsequently implements the HCLS-SM Core application. In the context of healthcare, a data model refers to a structured representation of the data used and managed within the healthcare system. It defines how data is organized, stored, and accessed, providing a framework for understanding the relationships between different types of data. A healthcare data model typically includes various entities, attributes, and their interconnections, reflecting the complex nature of healthcare information.

In this scenario, the healthcare data model is vital in managing patient information. Let's assume every healthcare organization has entities and attributes as one of the key components of a data model. Entities represent the different objects or concepts within the healthcare system, such as patients, healthcare providers, medical procedures, medications, etc. Attributes are the properties or characteristics of the entities. For example, attributes of a patient entity might include name, date of birth, gender, and medical history.

Gilly, a new patient, calls the healthcare organization seeking medical attention.

Procedure

1. In the Healthcare Workspace, navigate to **Lists** > **Interactions** > **My Interactions** > **New** to create a patient record.
2. Navigate to **Create Patient** in the Options menu to create a new patient record.
3. Complete the form fields and click **Save**.

   When a patient record is created in ServiceNow, a corresponding consumer record is generated, linking the patient's identity to the healthcare system.

Result
The power of the healthcare data model emerges as Gilly's patient record seamlessly connects to various aspects of their healthcare journey.

A list of appointments is linked, providing details like appointment type, service provided, location, and the attending practitioner. The patient records related list displays other information about her.

The healthcare organization notices improved efficiencies provided by the Healthcare and Life Sciences (HCLS) data model in HCLS-SM.

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The HCLS data model, through its well-defined entities and attributes, ensures a seamless patient experience. By efficiently capturing and organizing patient information, the data model not only simplifies registration processes but also enables healthcare providers to access vital medical history, contributing to enhanced patient care and satisfaction.

The healthcare organization is aware of how the data model plays a crucial role in helping healthcare organizations manage, organize, and analyze their data effectively. They aim to enhance interoperability, data integration, consistency, scalability, and compliance obligations and emphasize the importance of capturing and organizing data in a way that supports personalized and holistic patient care.

Configure 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 Configure the auto-generation of documents for healthcare cases.

Configure 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.

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Approve 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.

Configure 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.

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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 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. **Note:** The end date of the program service must be later than the start date.
Description	Summary of the program service.

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.

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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 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.

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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

Role required: sn.hcls_manager or admin

To associate an eligibility criteria checklist with the program, create a checklist. For more information, see Create a checklist.

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.

About this task

By default, the application provides a few sample programs for the Healthcare and Life Sciences workflows that you can 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.

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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 Configure 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 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.

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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.

Configure 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.

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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.
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

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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.

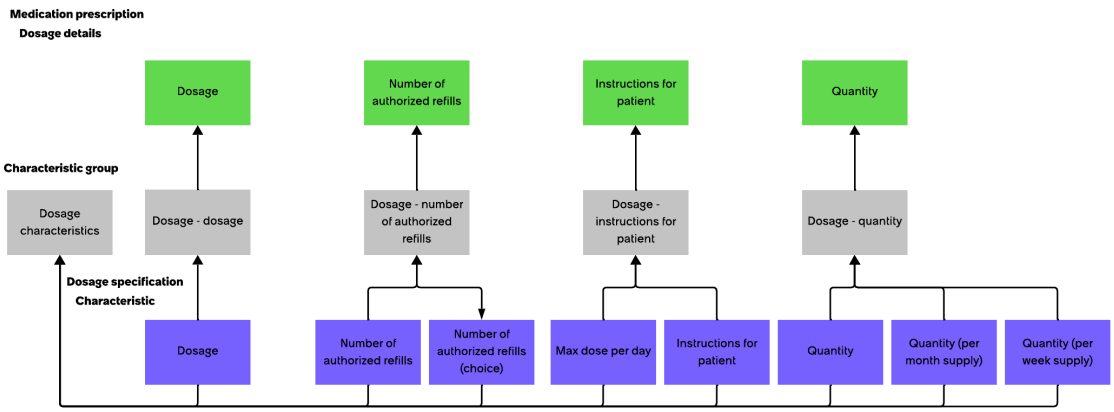
Dosage characteristics mapping

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 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



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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 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.

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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 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)

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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
Dosage - quantity	Quantity

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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 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.

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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.
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.

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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 Configure document templates for Healthcare and Life Sciences Service Management Core.

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

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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	Alpha-numeric profile identifier of the policy. 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. **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.
Policy category	This field should be set to **Registration**.
Policy type	Type of the policy. A policy is one of the following types: ○ **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. With the Document template policy type, a to-do item is created for the patient to sign the consent form.
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**.

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Field	Description
	Note: You can associate only one active policy with a document template. For more information, see Configure 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.
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*).
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	Manage the process of submitting the personal information from your patients on the Patient Portal by using a record producer.

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Patient Portal configuration tasks (continued)

Task	Description
personal information on the Patient Portal.	
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	Alpha-numeric profile identifier of the policy. 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. **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.
Policy category	This field should be set to **Registration**.
Policy type	Type of the policy. A policy is one of the following types: ○ **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. With the Document template policy type, a to-do item is created for the patient to sign the consent form.

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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**. **Note:** You can associate only one active policy with a document template. For more information, see Configure 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. 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 using the application picker. For more information, see Application picker.

Role required: admin

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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**.

Configure 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.

Configure 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.

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Patient Portal widgets (continued)

Widget	Description
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.

Set 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.

Set 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.

Configure 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.

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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.

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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.

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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.

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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.

Note:
For details on the fields, refer to Create a record producer.

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4. Click **Save**, then re-open the record.
5. In the related links, do the following:

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

   > **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.

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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.

Set 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 .

Configure 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 .

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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 Display patient information on a healthcare case type in Healthcare workspace.

Display 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.
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 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.
4. In the **Extends Table** field, click the lookup icon and search for and select the sn_hcls_case table.
5. Click **Submit**.
6. In the table record, navigate to the controls tab and set the Auto-number field to **True**.
7. Under the Application Access tab, set the following fields:

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- Can read - True
- Can create - True
- Can update - True
- Can delete - True
- Allow Configuration - True

8. Click **Save.**

Configure 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.

Create 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.

Manage healthcare 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.

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Healthcare workspace managing tasks (continued)

Task	Description
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.

View 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.

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

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.

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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.

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.

Respond 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.

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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**.

Note:
If you can't find a patient record, you can create a patient record from within an interaction. For more information, see Create a patient record in Workspace.

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.

View patient information in Workspace

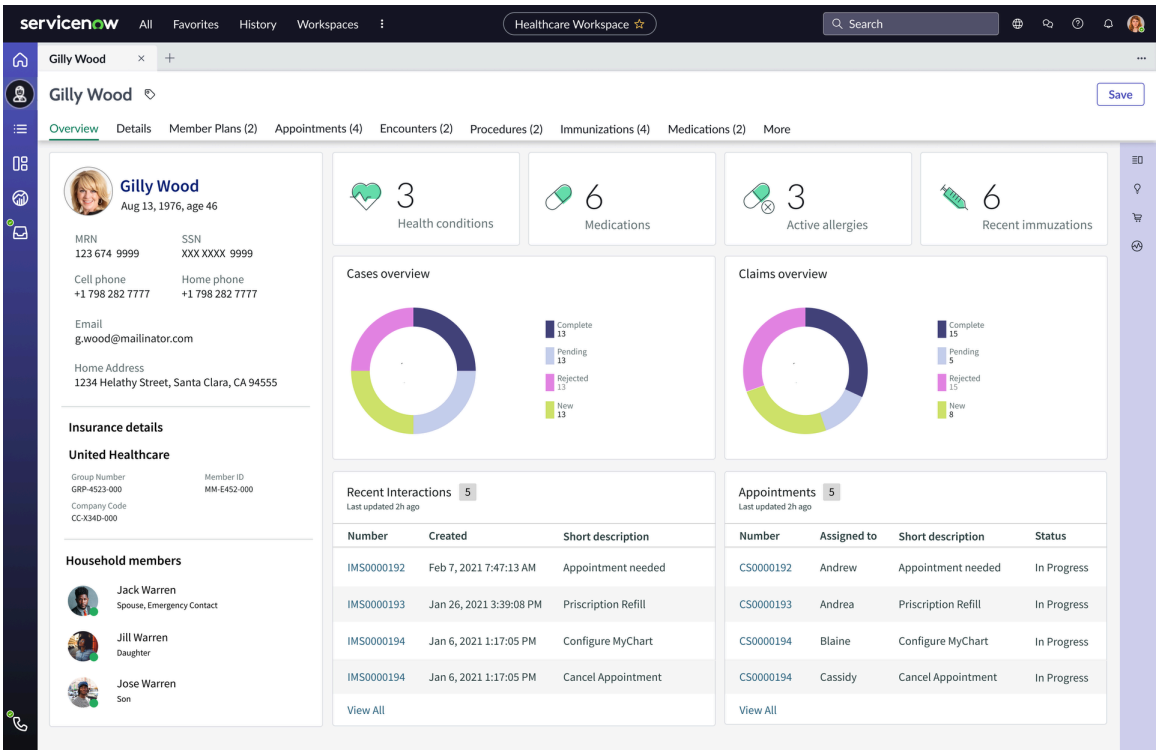
With the 360-degree view of a patient in Workspace, you can access the patient details anytime for any healthcare services.

The Patient information overview tab 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.

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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 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.

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Patient information displayed in Workspace (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 healthcare 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 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:

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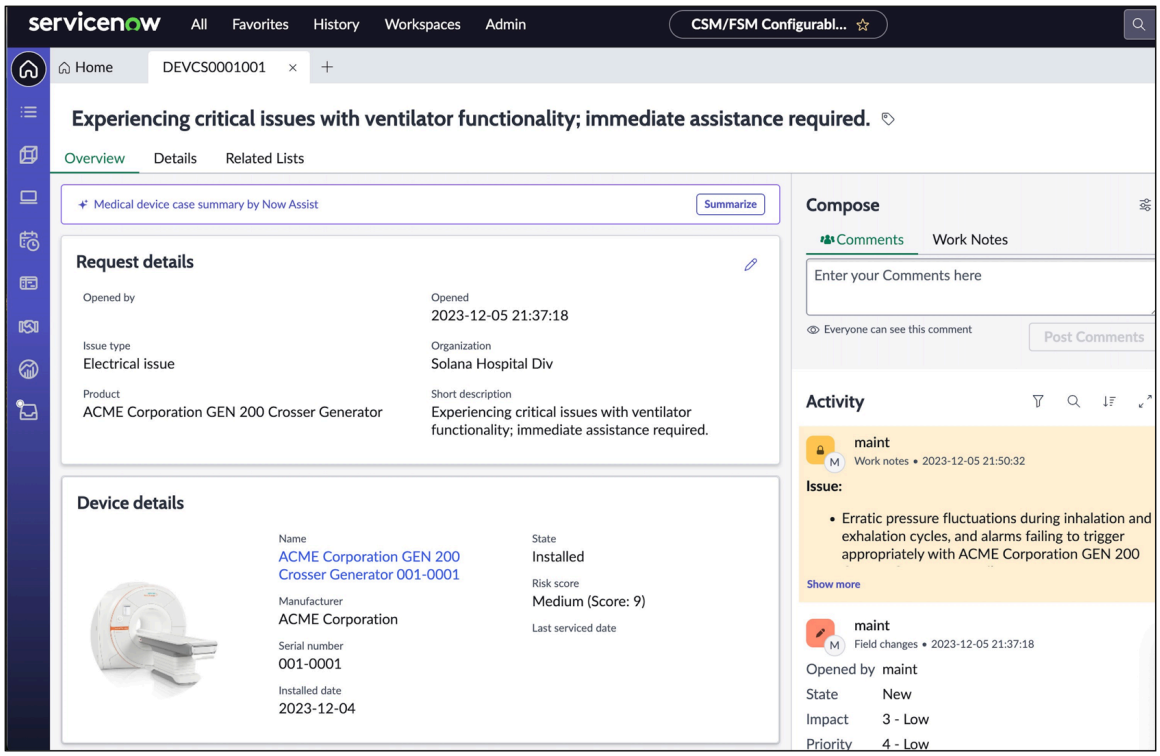
- Generate an initial summary of a case so that you can understand the case context.
- Summarize all the work that has been done on a case.

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

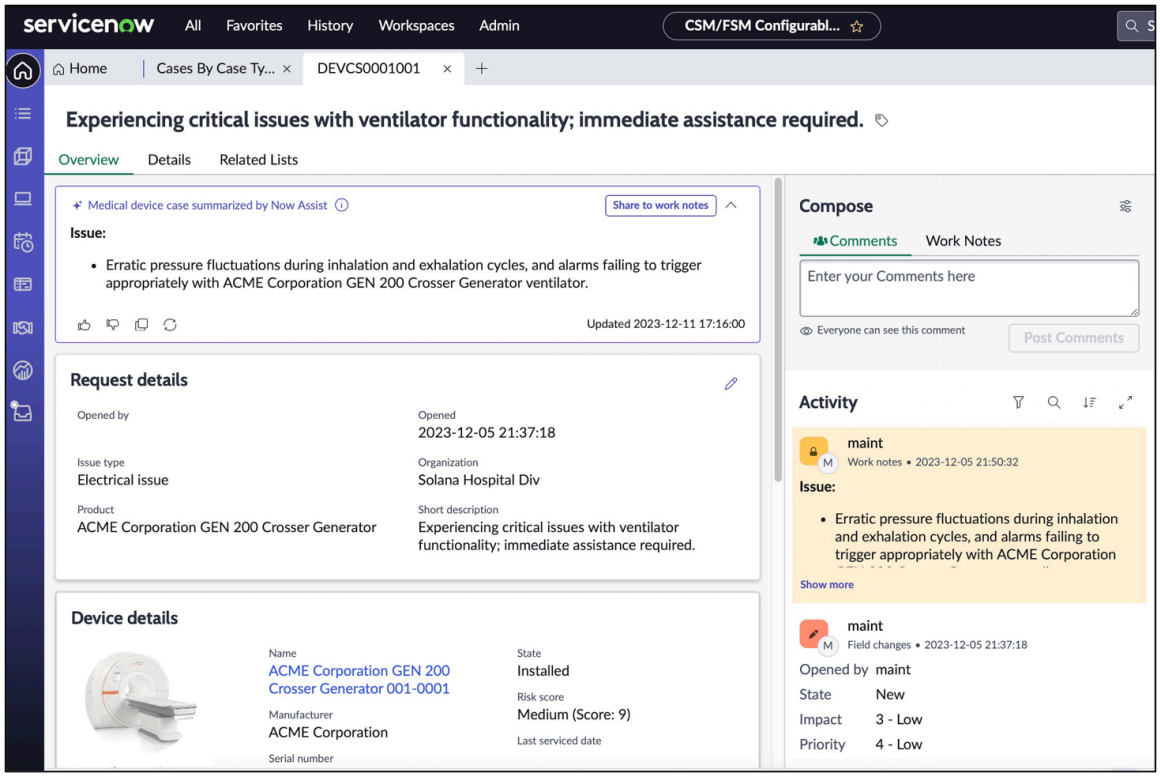


The case summary panel is displayed on the Overview tab.

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

- Short description
- Description
- Work notes
- Additional comments

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

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 summarixation skill, see Configuring Now Assist for Customer Service Management (CSM).

Use 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

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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.

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.

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.

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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.

Register 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.

Enter 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.

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

User roles are assigned by the use case that is being supported. For each feature, there are both roles with view-only access and roles with various levels of interactive access.

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.	• decision_table_admin • sn_doc.admin • sn_hcls.manager • sn_previsit.admin

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Healthcare and Life Sciences Service Management Core roles (continued)

Role	Description	Contains roles
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
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.	• 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.	• 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.	• 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

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Healthcare and Life Sciences Service Management Core roles (continued)

Role	Description	Contains roles
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.	• 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 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. Can view and edit the CSM Households table, Member Plan table, Pre-authorization Request table, and all clinical tables. Can create household members and pre-auth requests.	• canvas_user • sn_customerservice.csm_workspace_us • sn_customerservice.customer_data_viev • 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	• canvas_user • model_manager • sn_customerservice.csm_workspace_us

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Healthcare and Life Sciences Service Management Core roles (continued)

Role	Description	Contains roles
	instance. In addition, creates and manages accounts, contact, account relationships, contact relationships, and account consumer relationships.	• sn_customerservice.customer_data_view • 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 • sn_hcls.revenue_cycle_data_writer • sn_previsit.patient_service_agent
sn_hcls.patient	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. Household members and addresses associated with a patient are maintained by using the Household Member [csm_household_member] and Location [cmn_location] tables, respectively. Location is associated with the foundation domain in the Common Service Data Model (CSDM).	• 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

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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). Creates Medication Prescriptions. Create Immunizations.	• sn_customerservice.customer_data_viev • 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

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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, 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.

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

Table	Description
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. **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 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

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

Table	Description
	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.
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.
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 [sn_hcls_practitioner]	Stores the details of a practitioner in your healthcare organization.
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.

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

Table	Description
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.

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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.
Playbooks for Customer Service	Enables the CSM Configurable Workspace playbook experience.

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

App	Description
Management (sn_csm_playbook)	
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_cmpnt)	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.
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

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

Business rule	Table	Rule criteria	Description
			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 `Allergies - authorized to view` 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 `Allergies - authorized to view` 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 `Healthcare cases - authorized to view` before query when a patient queries the Healthcare case [sn_hcls_case] table in the list or form view.
Patient access to	Claim header [sn_hcls_claim_header]	Before query	Runs the `Claim headers - authorized to view` before query when a patient queries the Claim

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

Business rule	Table	Rule criteria	Description
claim header table			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.
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.

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

Business rule	Table	Rule criteria	Description
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.
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.

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

Business rule	Table	Rule criteria	Description
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 *`DosageCharacteristicsMapper`* 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.
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.

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

Business rule	Table	Rule criteria	Description
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.
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.

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

Business rule	Table	Rule criteria	Description
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.

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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	Category of an identified substance associated with the allergy or intolerance. The following categories are available by default: • Biological • Environment • Food • Medication For more information about the available categories, see allergy intolerance categories defined in the FHIR specifications.
Clinical status	Choice list	Status of the allergy or intolerance under clinical trial. The following statuses are available by default: • Active • Inactive • Resolved For more information about the available statuses, see allergy intolerance clinical statuses defined in the FHIR specifications.
Criticality	Choice list	Estimate of the potential clinical harm or seriousness of a reaction to an identified substance. The following types are available by default: • High • Low • Unable to access For more information about the available types, see allergy intolerance criticality types defined in the FHIR specifications.
Date of onset	Date/ Time	Date and time that the allergy or intolerance began.

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Allergy intolerance form fields (continued)

Field	Data type	Description
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	Alpha-numeric profile identifier of the allergy intolerance. 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. **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.
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	Underlying physiological mechanism for a reaction risk. The following types are available by default: • Allergy • Intolerance For more information about the available types, see allergy intolerance types defined in the FHIR specifications.
Verification status	Choice list	Assertion about certainty associated with a propensity or potential risk of a reaction to the identified substance. The following statuses are available by default: • Confirmed • Entered in error • Refuted • Unconfirmed For more information about the available statuses, see allergy intolerance verification statuses defined in the FHIR specifications.

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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 status	Choice list	Status of an appointment. The following statuses are available by default: • Arrived • Booked • Cancelled • Checked in • Entered in error • Fulfilled • No show • Pending • Proposed • Waitlist For more information about the available statuses, see appointment statuses defined in the FHIR specifications.

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Appointment table fields (continued)

Field	Data type	Description
Appointment type	Choice list	Style of appointment or patient that has been booked in the slot. The following types are available by default: • Checkup • Emergency • Follow up • Routine • Walkin For more information about the appointment types, see appointment types defined in the FHIR specifications.
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.
Location	Reference	Location of the appointment.
Number	String	Alpha-numeric profile identifier of the appointment. 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. **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.
Observation	Reference	Observation associated with the appointment.
Patient	Reference	Name of the patient.
Patient Instructions	String	Patient-facing information about the appointment.

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Appointment table fields (continued)

Field	Data type	Description
		For example, request to bring a referral or fast from 8 p.m. the night before.
Practitioner	Reference	Person added as the practitioner. Practitioners associated with an appointment are referenced in the Appointment participant [sn_hcls_appointment_participant] table.
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. For more information about the service categories, see service categories defined in the FHIR specifications.
Service type	Reference	Specific service that is to be performed during this appointment. For more information about the service types, see service types defined in the FHIR specifications.
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.

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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	Type of the participant. The following types are available by default: • Organization • Practitioner • Referring patient
Practitioner ID	Reference	Identifier of the practitioner entered in the EMR system.
Practitioner category	Choice list	Category of the practitioner The following categories are available by default: • 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.

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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	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. **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.
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	Status of the appointment booking task. The following task statuses for an appointment booking are available by default:

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Book appointment table fields (continued)

Field	Data type	Description
		• 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.

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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.
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	Alpha-numeric profile identifier of the claim header. 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. **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.
Paid amount	Currency	Amount to be paid by the patient.

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Claim header table fields (continued)

Field	Data type	Description
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.
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	Status of the claim. The following statuses are available by default: • Active • Cancelled • Denied • Draft • Entered in error • In hold • Paid • Suspended For more information about the available statuses, see claim statuses defined in the FHIR specifications.

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Claim header table fields (continued)

Field	Data type	Description
Transaction control number	String	Unique identifier of the claim in the payer system.
Type	Choice list	Type of the claim. The following types are available by default: • Institutional • Oral • Pharmacy • Professional • Vision 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.

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Claim line table fields (continued)

Field	Data type	Description
Comments	String	Additional information about the clam 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.
Line status	Choice list	Status of the claim line rather than the entire claim. The following statuses are available by default: • Active • Cancelled • Denied • Draft • Entered in error • In hold • Paid • Suspended For more information about the available statuses, see claim statuses defined in the FHIR specifications.
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	Alpha-numeric profile identifier of the claim line. 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.

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Claim line table fields (continued)

Field	Data type	Description
		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.
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.
Procedure code	Reference	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. For more information about the available codes, see procedure codes defined in the FHIR specifications.
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.

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Claim line table fields (continued)

Field	Data type	Description
Tooth code	String	Code of the tooth on which service was performed. Applies to dental providers only.

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	Category of the condition. The following categories are available by default: • Diagnosis • Problem For more information about the available categories, see condition categories defined in the FHIR specifications.
Clinical status	Choice list	Status of the subject under clinical trial. The following statuses are available by default: • Active • Inactive • Recurrence • Relapse • Remission • Resolved

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Condition table fields (continued)

Field	Data type	Description
		For more information about the available statuses, see condition clinical statuses defined in the FHIR specifications.
Condition code	Reference	Identifier of the condition, problem, or diagnosis.
Date recorded	Date/ Time	Date and time when the condition was first recorded into the application. This field is automatically set to the current date and time.
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	Alpha-numeric profile identifier of the condition. 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. **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.
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	Verification status to support or decline the clinical status of the condition. The following statuses are available by default:

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Condition table fields (continued)

Field	Data type	Description
		• Confirmed • Differential • Entered in error • Provisional • Refuted • Unconfirmed For more information about the available statuses, see condition verification statuses defined in the FHIR specifications.

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.

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Dosage definition table fields (continued)

Field	Data type	Description
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**.
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.

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Dosage specification table fields (continued)

Field	Data type	Description
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**.
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.

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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	Time during the encounter that the participant participated. This field is automatically set to the duration between **Start time** and **End time** of an encounter.
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	Alpha-numeric profile identifier of the encounter. 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. **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.
Parent encounter	Reference	Parent healthcare event associated with the encounter.

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Encounter table fields (continued)

Field	Data type	Description
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.
Service type	Reference	Broad category of the service that is to be provided. For more information about the available types, see service types defined in the FHIR specifications.
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	Status of the encounter. The following statuses are available by default: • Arrived • Cancelled • Entered in error • Finished • In progress • On leave • Planned • Triaged • Unknown For more information about the available statuses, see encounter statuses defined in the FHIR specifications.

Enrolled Program table

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

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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	State of the enrollment program. State is one of the following types: • Canceled • Enrolled • Fulfilled • Pending fulfillment • Rejected • Requested
Number	String	Alpha-numeric profile identifier of the enrolled program. 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. **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.
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.

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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	State of the enrollment program service. State is one of the following types: • Canceled • Enrolled • Fulfilled • Pending fulfillment • Rejected • Requested
Number	String	Alpha-numeric profile identifier of the enrolled program service. 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. **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.
Patient	Reference	Consumer or account that is enrolled into the program as a patient.

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Enrolled Program Service table fields (continued)

Field	Data type	Description
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

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- 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	Common language including set of identifiers, names, and codes for identifying health measurements, observations, and documents. The following types are available by default: • Allergy Intolerance • Body site • Care specialty • Condition • Encounter • Language code • Medication code • Medication form code • Observation • Practitioner type • Procedure • Priority • Service category • Service type

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Healthcare code set table fields (continued)

Field	Data type	Description
		For more information about the available code sets, see value sets all types defined in the FHIR specifications.

Healthcare location table

The Healthcare Location [sn_hcls_location] table provides the ability to map common locations to Healthcare Organizations.

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.
- Contains the Location field, which references the common location [cmn_location] table.
- To associate healthcare locations with healthcare organizations, see Associate healthcare locations with a healthcare organizations.

For more information on how healthcare locations and healthcare organizations function, see Setting up healthcare locations and healthcare organizations.

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.
Description	String	More details about the location that could be displayed as further information to identify the location beyond its name.
Identifier	String	The unique identifier of the healthcare location.
Location	Reference	Physical location of this healthcare location. Entry selected here populates address fields.

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Healthcare location table fields (continued)

Field	Data type	Description
		References the Common location [cmn_location] table.
Name	String	Name to identify the healthcare location.
Number	String	ID number associated with the healthcare location record. This field is read-only.
Parent location	Reference	Sys_id of the parent healthcare location associated with this healthcare location.
Physical type	Choice list	Physical form of the location.
Status	Choice list	Option to indicate whether the healthcare location is in use. The following statuses are available by default: • Active • Inactive • Suspended

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.
- Other healthcare organizations can be nested within while also being associated with multiple healthcare locations.
- When a healthcare organization is created, an associated business location is also created with the same name that references the healthcare organization.
- Contains the Business location field, which references the CSM business location [sn_csm_business_location] table.
- To associate healthcare organizations with healthcare locations, see Associate healthcare locations with a healthcare organizations.

For more information on how healthcare locations and healthcare organizations function, see Setting up healthcare locations and healthcare organizations.

Role required to configure the table: sn_hcls.admin.

For more information, see Healthcare and Life Sciences data model.

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Healthcare organization table fields

Field	Data type	Description
Business location	Reference	The associated business location. References the CSM business location [sn_csm_business_location] table.
Identifier	String	The unique identifier of the healthcare organization.
Name	String	Name to identify the healthcare organization.
Number	String	ID number generated for this healthcare organization record. This field is read-only.
Organization type	Choice list	Type of healthcare organization you represent. The following types are available by default: • Clinical research sponsor • Community group • Educational institute • Government • Healthcare provider • Hospital department • Non-healthcare business • Organizational team • Other • Payer • Pharmaceutical company • Religious institution
Parent	Reference	Parent organization associated with the organization.

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.

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Key features

- Extends the Task [task] table to store all healthcare tasks associated with a patient or a healthcare case.
- 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	Route by which the vaccine was administered. The following routes are available by default: • Intradermal • Intramuscular • Intravenous • Nasal • Oral • Percutaneous • Subcutaneous • Transdermal

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Immunization table fields (continued)

Field	Data type	Description
		For more information about the available routes, see immunization routes defined in the FHIR specifications.
Body site	Choice list	Body site at which the vaccine was administered. The following body sites are available by default: • 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 For more information about the body sites, see immunization sites defined in the FHIR specifications.
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.
Healthcare location	Reference	Service delivery location in which the vaccine was or was to be administered.
Number	String	Alpha-numeric profile identifier of the immunization.

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Immunization table fields (continued)

Field	Data type	Description
		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. **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.
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	Status of the immunization. The following statuses are available by default: • Completed • Incorrect entry • Not done For more information about the available statuses, see immunization statuses defined in the FHIR specifications.
Status reason	String	Explanation why a vaccine was not administered.
Target disease	Reference	Vaccine preventable disease the dose is being administered for.
Vaccine expiry date	Date	Date when the vaccine product expires.
Vaccine lot number	String	Lot number of the vaccine product.

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Immunization table fields (continued)

Field	Data type	Description
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.
Number	String	Alpha-numeric profile identifier of the medication. 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.

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Medication table fields (continued)

Field	Data type	Description
		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.
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	Status of the medication. The following statuses are available by default: • Completed • Entered in error • In progress • Not done • On hold • Stopped • Unknown

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Medication table fields (continued)

Field	Data type	Description
		For more information about the available statuses, see medication statuses defined in the FHIR specifications.
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.
Number	String	Alpha-numeric profile identifier of the enrolled program. 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.

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Medication Prescription table fields (continued)

Field	Data type	Description
		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.
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. The following statuses are available by default: • Active • Draft • Cancelled

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Medication Prescription table fields (continued)

Field	Data type	Description
		• Completed • Entered in error • Expired • On-Hold • Stopped • Unknown For more information about the available statuses, see medication prescription statuses defined in the FHIR specifications.
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.

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.

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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	Alpha-numeric profile identifier of the medical device. 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. **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.
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	Installation status of the medical device. The following install statuses for a medical device are available by default: • Absent • Canceled • In Maintenance • Installed • Pending install • Retired • Stolen

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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:

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Member plan table fields (continued)

Field	Data type	Description
		• **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.

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Observation table fields

Field	Data type	Description
Anatomical location	Reference	Body sites of the observation.
Category	Choice list	High-level observation category. The following categories are available by default: • Activity • Exam • Imaging • Laboratory • Procedure • Social history • Survey • Therapy • Vital signs For more information about the available categories, see observation categories defined in the FHIR specifications.
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	Alpha-numeric profile identifier of the observation. 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. **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.
Observation	Reference	Code for an observation type. For more information about the available codes, see observation codes defined in the FHIR specifications.

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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	Status of an observation. The following statuses are available by default: • Amended • Final • Preliminary • Registered For more information about the available statuses, see observation statuses defined in the FHIR specifications.
Verification status	Choice list	Verification status to support or decline the clinical status of the condition or diagnosis. The following statuses are available by default: • Confirmed • Differential • Entered in error • Provisional • Refuted • Unconfirmed For more information about the available statuses, see condition verification statuses defined in the FHIR specifications.

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.

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- Stores basic patient information including first name, last name, date of birth, gender, primary and secondary emails, home, work and mobile phones.
- 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	Ethnic group the patient identifies with. The following types are available by default: • 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	Gender of the patient. The following types are available by default: • Female • Male • Non binary • Not disclosed • Other
Guarantor id	String	Identifier that applies to a person who is responsible for paying all charges for services ordered on behalf of the patient

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Patient table fields (continued)

Field	Data type	Description
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	Alpha-numeric profile identifier of the patient. 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. **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.
Preferred communication channel	Choice list	Patient's preferred communication channel, including email, phone, or chat. The value is dependent on the value entered in the Preferred communication method field.

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Patient table fields (continued)

Field	Data type	Description
Preferred communication method	Choice list	Patient's preferred communication method, including email, text, or phone.
Prefix	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 start of the name. For example, Mr. or Mrs.
Primary email	String	Email address of the patient to which any correspondence is sent.
Race	Choice list	Race of the patient. The following types are available by default: • 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.
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.

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Patient table fields (continued)

Field	Data type	Description
Work phone	String	Work phone number of the patient.

Patient identifier table

The Patient identifier [sn_hcls_patient_identifier] table stores the identification details of a patient.

Key features

Stores the various patient identifiers associated with a patient in your healthcare organization.

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
Number	String	Patient ID number associated with the patient name. This field is read-only.
Value	String	The value of the associated identifier type. For example, if Health Insurance ID is selected in the identifier type field, the value here should reflect the patient's health insurance ID number or code.
Identifier type	Choice list	The type of patient identifier indicated. Options are: • Medical Record Number • Social Security Number • Health Insurance ID • Driver's Licence • Passport Number • Biometric Identifiers
Identifier system	String	The system associated with this patient identifier.
Patient	Reference	The associated patient name as indicated on the patient record.
Valid from	Date/time	The date from which this identifier is considered valid.

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Patient table fields (continued)

Field	Data type	Description
Valid to	Date/time	The date at which this identifier expires.
Issuing authority	String	The authority or agency that issued this patient identifier.

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**. **Note:** You can associate only one active policy with a document template. For more information, see Configure document templates for Healthcare and Life Sciences Service Management Core.
External policy link	URL	External reference to the policy included in a consent scope.
Number	String	Alpha-numeric profile identifier of the policy.

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Policy table fields (continued)

Field	Data type	Description
		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. **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.
Policy category	Choice list	Category of a policy. The following categories are available by default: • 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 For more information about the available categories, see consent category value set defined in the FHIR specifications.
Policy name	String	Name to identify the policy.
Policy type	String	Type of the policy. A policy is one of the following types: • **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. With the Document template policy type, a to-do item is created for the patient to sign the consent form.
Scope	Choice list	Type of consent included in the policy. The following scope types are available by default:

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Policy table fields (continued)

Field	Data type	Description
		• Advance care directive • Research • Privacy consent • Treatment For more information about the available scopes, see consent scope value set defined in the FHIR specifications.
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. 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.

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Policy consent table fields (continued)

Field	Data type	Description
		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.
Patient	Reference	Individual establishing their personal consent.
Policy	Reference	Policy covered by the consent.
Status	Choice list	Status of a consent. The following statuses are available by default: • Active • Draft • Inactive • Proposed • Rejected For more information about the available categories, see consent state value set defined in the FHIR specifications.
Signed by household member	True/ False	Option to indicate that the consent was provided by a household member of the patient.
Valid until	Date	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. **Note:** The **Status** field value is updated as active or inactive based on the **Valid until** date.

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.

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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	Ethnic group the practitioner identifies with. The following types are available by default: • 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	Gender of the practitioner. The following types are available by default: • Female • Male • Non binary • Not disclosed • Other

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Practitioner table fields (continued)

Field	Data type	Description
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	Alpha-numeric profile identifier of the practitioner. 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. **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.
Practitioner id or NPI	String	Identifier that applies to the person in the practitioner role.
Prefix	String	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. For example, Doctor or Dr.
Primary email	String	Email address of the practitioner to which any correspondence is sent.
Race	Choice list	Race of the practitioner. The following types are available by default: • American Indian or Alaska Native • Asian • Black or African American • Native Hawaiian or Other Pacific Islander • Other Race

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Practitioner table fields (continued)

Field	Data type	Description
		Unable to report due to do policy/law • White
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	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. For example, M.D. (Physician)
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.

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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.

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Practitioner location specialty table fields (continued)

Field	Data type	Description
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	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.

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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	Code to identify the specific procedure. Code is based

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Pre-authorization item table fields (continued)

Field	Data type	Description
		on the Current Procedural Terminology (CPT) or Healthcare Common Procedure Coding System (HCPCS) coding system. For more information about the available codes, see procedure codes defined in the FHIR specifications.
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.

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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	Category of the healthcare service. The following types are available by default: • 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.
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.

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Pre-authorization request table fields (continued)

Field	Data type	Description
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	Approval status of the pre-authorization request. The following types are available by default: • 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	Type of the healthcare service requested in the pre-authorization request. The following types are available by default: • 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.

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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	Code that classifies a procedure for searching, sorting, and display purposes. The following categories are available by default: • Psychiatry procedure or service • Counselling • Education • Surgical procedure • Diagnostic procedure • Chiropractic manipulation • Social service procedure For more information about the available types, see procedure categories defined in the FHIR specifications.
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	Alpha-numeric profile identifier of the procedure. 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.

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Procedure table fields (continued)

Field	Data type	Description
		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.
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	Code to identify the specific procedure. Code is based on the Current Procedural Terminology (CPT) or Healthcare Common Procedure Coding System (HCPCS) coding system. For more information about the available codes, see procedure codes defined in the FHIR specifications.
Source	Reference	Source system details of an external healthcare system in a ServiceNow instance.
Status	Choice list	Status of a procedure. The following statuses are available by default: • Completed • Entered In Error • In Progress • Not Done • On Hold • Preparation • Stopped • Unknown For more information about the available statuses, see event statuses defined in the FHIR specifications.

Program table

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

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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.
Name	String	Name of the program
Number	String	Alpha-numeric identifier of the program. 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. **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.
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.

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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.
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.

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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. **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.

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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.

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Update insurance information table fields (continued)

Field	Data type	Description
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.

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

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

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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

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 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.
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

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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

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 widget instance options fields

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

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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

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

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

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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.
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.

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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.
Dosage specification	Dosage specification for the patient. **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.
Status	Status of the ordered prescription. The following statuses are available by default: • Active • Draft • Cancelled • Completed • Entered in error • Expired • On-Hold

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Medication Prescription form fields (continued)

Field	Description
Medication Prescription	
	• Stopped • Unknown For more information about the available statuses, see medication prescription statuses defined in the FHIR specifications.
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.
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.

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Medication Prescription form fields (continued)

Field	Description
Medication Prescription	
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	Alpha-numeric profile identifier of the policy. 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. **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.

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Policy form fields (continued)

Field	Description
Policy category	This field should be set to **Registration**.
Policy type	Type of the policy. A policy is one of the following types: • **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. With the Document template policy type, a to-do item is created for the patient to sign the consent form.
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**. **Note:** You can associate only one active policy with a document template. For more information, see Configure 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.

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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.

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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 port For multiple entries, separate the task tab names with commas. • Type: string • Default value: sn_doc_task,sn_hcls_insurance_info_ta • 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 `True` to enable the se registration feature in the Patient Portal. • Type: true | false • Default value: true • Location: System Property [sys_properties] table • Learn more: Configure the self-registration feature on the Patient Porta
Patient portal FAQ category ID sn_hcls.psp.patient_portal_faq_category_id	Sys id of the default 'Frequently asked questions' knowledge category (table kb_category) section of HCLS Patient port Replacing this would allow someone to replace the FAQs they wish to display on HCLS patient portal. • Type: string • Default value: 2bee428777400110ac9cd0cb8d5a999 • Location: System Property [sys_properties] table
Patient Portal enable REM conversion glide.service_portal.resize_text.patientportal.enable_rem_conversion	Variable specifically for service portal. Setting this to true enables service portal text to be resized up to 200% using brows settings.

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Properties for Healthcare and Life Sciences Service Management Core (continued)

Property	Description
	• Type: true | false • Default value: true • Location: System Property [sys_properties] table

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.

Healthcare and Life Sciences Service Management Core 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.

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Cryptographic Modules in Healthcare and Life Science Service Management Core

Healthcare and Life Sciences Service Management Core contains the following cryptographic modules.

sn_hcls.clinical_data

Crypto module: clinical_data AES-256.

Encrypted field configurations

Table	Column
sn_hcls_allergy	recorded_date
sn_hcls_encounter	sn_hcls_encounter
sn_hcls_medication	end_date
sn_hcls_condition	recorded_date
sn_hcls_allergy	onset_date
sn_hcls_medication	reason_desc
sn_hcls_observation	observed_date
sn_hcls_allergy	onset_age
sn_hcls_medication_prescription	external_id
sn_hcls_procedure	performed_date_time
sn_hcls_immunization	status_reason
sn_hcls_encounter	start_time
sn_hcls_medication	status_reason
sn_hcls_condition	onset_age
sn_hcls_medication_prescription	status_reason
sn_hcls_medication	effective_date_time
sn_hcls_condition	onset_date
sn_hcls_medication	reason_code
sn_hcls_immunization	admin_date
sn_hcls_medication	start_date

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Module access policy

Policy Name	Type	Target Role
Clinical data viewer	Role	sn_hcls.clinical_data_viewer
Clinical data system access	System Access	
Clinical data - admin	Role	admin
Clinical data manager	Role	sn_hcls.manager

sn_hcls.foundation_data

Crypto module: foundation_data AES-256.

Module access policy

Policy Name	Type	Target Role
Foundation data viewer	Role	sn_hcls.foundation_data_viewer
Foundation data - admin	Role	admin
Foundation data system access	System Access	
Foundation data manager	Role	sn_hcls.manager

sn_hcls.health_insurance_data

Crypto module: health_insurance_data AES-256.

Encrypted field configurations

Table	Column
sn_hcls_pre_auth_header	date_fax_received
sn_hcls_pre_auth_header	primary_preauth_num
sn_hcls_insurance_info_task	group_number
sn_hcls_pre_auth_header	secondary_preauth_num
sn_hcls_insurance_info_task	rx_pcn
sn_hcls_member_plan	group_number
sn_hcls_pre_auth_header	valid_from
sn_hcls_insurance_info_task	member_number
sn_hcls_pre_auth_header	reason
sn_hcls_pre_auth_header	notes
sn_hcls_member_plan	rx_pcn
sn_hcls_member_plan	member_number
sn_hcls_member_plan	rx_group
sn_hcls_insurance_info_task	rx_group

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Encrypted field configurations (continued)

Table	Column
sn_hcls_insurance_info_task	rx_bin
sn_hcls_member_plan	rx_bin
sn_hcls_pre_auth_header	approved_date
sn_hcls_pre_auth_header	valid_to

Module access policy

Policy Name	Type	Target Role
Health Insurance data system access	System Access	
Health Insurance data viewer	Role	sn_hcls.health_insurance_data_viewer
Health Insurance data manager	Role	sn_hcls.manager
Health insurance data - admin	Role	admin
Access to fix script for health insurance	Script	

sn_hcls.patient_data

Cryptographic module: patient_data AES-256.

Encrypted field configurations

Table	Column
sn_hcls_patient	name
sn_hcls_patient	work_phone
sn_hcls_patient	marital_status
sn_hcls_patient	ethnicity
sn_hcls_patient	birth_date
sn_hcls_patient	occupation
sn_hcls_patient	middle_name
sn_hcls_patient	primary_email
sn_hcls_patient	race
sn_hcls_patient_identifier	value
sn_hcls_patient	secondary_email
sn_hcls_patient	address_line
sn_hcls_patient	family_name
sn_hcls_patient	given_name

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Encrypted field configurations (continued)

Table	Column
sn_hcls_patient	mobile_phone
sn_hcls_patient	home_phone
sn_hcls_patient	deceased_date_time
sn_hcls_patient	guarantor_id

Module access policy

Policy Name	Type	Target Role
Patient data system access	System Access	
Patient data - admin	Role	admin
Patient data viewer	Role	sn_hcls.patient_data_viewer
Patient data manager	Role	sn_hcls.manager

sn_hcls.practitioner_data

Cryptographic module: practitioner_data AES-256.

Encrypted field configurations

Table	Column
sn_hcls_practitioner	secondary_email
sn_hcls_practitioner	name
sn_hcls_practitioner	external_id
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

Module access policy

Policy Name	Type	Target Role
Practitioner data - admin	Role	admin
Practitioner data viewer	Role	sn_hcls.practitioner_data_viewer
Practitioner data manager	Role	sn_hcls.manager

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Module access policy (continued)

Policy Name	Type	Target Role
Practitioner data - HclsUtils	Script	
Practitioner data system access	System Access	

sn_hcls.revenue_cycle_data

Cryptographic module: revenue_cycle_data AES-256.

Encrypted field configurations

Table	Column
sn_hcls_claim_line	service_start_date
sn_hcls_claim_header	billed_drg_code
sn_hcls_claim_header	service_provider_id
sn_hcls_claim_line	original_tcn
sn_hcls_claim_header	name
sn_hcls_claim_line	service_end_date
sn_hcls_claim_header	payment_date
sn_hcls_claim_header	adjudicated_date
sn_hcls_claim_header	accepted_date
sn_hcls_claim_line	ndc_code
sn_hcls_claim_line	tooth_code
sn_hcls_claim_line	revenue_code
sn_hcls_claim_header	patient_account_no
sn_hcls_claim_line	line_title
sn_hcls_claim_header	submitted_date
sn_hcls_claim_header	medical_record_no

Module access policy

Policy Name	Type	Target Role
Revenue cycle manager	Role	sn_hcls.manager
Revenue cycle system access	System Access	
Revenue cycle data - admin	Role	admin
Revenue cycle data viewer	Role	sn_hcls.revenue_cycle_data_viewer
Access to fix script for Revenue module	Script	

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sn_vaccine_sm.vm_crypto_module

Cryptographic module: vm_crypto_module AES-256.

Encrypted field configurations

Table	Column
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_request	age_group
sn_vaccine_sm_personal_info	healthcare_worker
sn_vaccine_sm_personal_info	age_group
sn_vaccine_sm_request	any_infections
sn_vaccine_sm_questionnaire	recently_sick
sn_vaccine_sm_personal_info	gender
sn_vaccine_sm_personal_info	country
sn_vaccine_sm_personal_info	ethnicity
sn_vaccine_sm_request	long_term_health_issue_details
sn_vaccine_sm_questionnaire	recent_vaccination
sn_vaccine_sm_request	health_history
sn_vaccine_sm_request	any_reaction
sn_vaccine_sm_personal_info	other_occupation
sn_vaccine_sm_personal_info	street
sn_vaccine_sm_request	long_term_health_issues
sn_vaccine_sm_personal_info	city
sn_vaccine_sm_questionnaire	any_other_comments
sn_vaccine_sm_questionnaire	pregnant

Module access policy

Policy Name	Type	Target Role
Vaccine crypto clinician	Role	sn_vaccine_sm.clinician
Vaccine crypto manager	Role	sn_vaccine_sm.manager
Vaccine crypto admin	Role	admin
Vaccine crypto user	Role	sn_vaccine_sm.user
Vaccine crypto system access	System Access	

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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 ServiceNow AI Platform is supported in the Healthcare and Life Sciences Service Management Core application.

Field Encryption Enterprise

Field 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 Field Encryption Enterprise plugin (com.glide.now.platform.encryption).

For more information about obtaining Field Encryption Enterprise, see Activate Field Encryption. For more information about selecting the parent crypto module, see Create a cryptographic module.

For more information on Field Encryption Starter and Field Encryption Enterprise, see .

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

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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

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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

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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_practioner	secondary_email
sn_hcls_practioner	name
sn_hcls_practioner	external_id

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

Table	Field
sn_hcls_practioner	family_name
sn_hcls_practioner	mobile_phone
sn_hcls_practioner	work_phone
sn_hcls_practioner	given_name
sn_hcls_practioner	birth_date
sn_hcls_practioner	work_email
sn_hcls_practioner	primary_email
sn_hcls_practioner	home_phone
sn_hcls_pre_auth_header	date_fax_received
sn_hcls_pre_auth_header	date_fax_received
sn_hcls_pre_auth_header	primary_preauth_num
sn_hcls_pre_auth_header	secondary_preauth_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

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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.

Create service requests from directly within an EMR system that can then be fulfilled using a ServiceNow instance.

Get started

Explore  Learn about how clinicians and healthcare agents use EMR Help.	Configure  Plan and configure your implementation.	Request  Submit ServiceNow service requests from EMR systems
Resolve  Resolve ServiceNow service requests from EMR systems	Reference  Get details about components like fields, tables, and properties.	

Troubleshoot and get help

- Remote help request API
- EMR Help forum on the ServiceNow Community site

Exploring EMR Help

Learn more about the available features offered by EMR Help to help create a seamless experience for your clinicians to raise requests from an external EMR system.

EMR Help 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

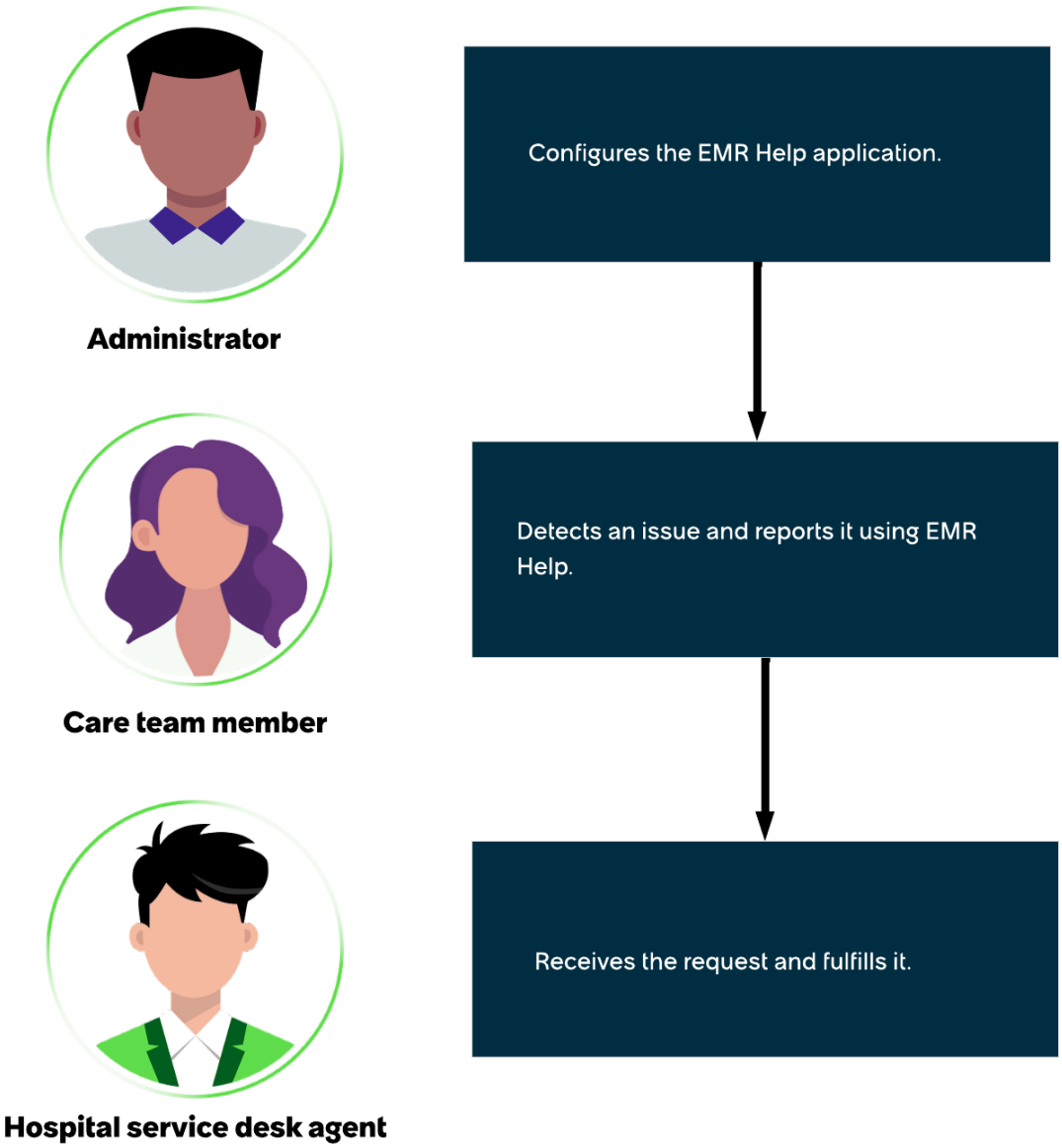
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automatically creates a service request in a ServiceNow instance. Necessary details such as patient record are added automatically and the service agent can quickly and effectively solve the issues detected by the clinician.

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. 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.

EMR Help workflow



In the EMR Help workflow:

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1. An administrator configures the EMR Help application to address different types of clinician issues submitted from an EMR system.
2. A clinician detects an issue and creates a service request from directly within the EMR system using the EMR Help portal.
3. A hospital desk service agent receives the request and fixes the issue using a ServiceNow instance.

EMR Help benefits

EMR Help provides the following benefits:

EMR Help Benefits

Benefit	Feature	Users
Save time by submitting requests to your ServiceNow instance directly from an EMR system.	Create requests within your EMR system	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 options in EMR Help	Administrator
Automatically transmit instance information to hospital service desk agents.	Resolve EMR Help requests	Service Desk Agent

What to explore next

To learn more about configuring and using EMR Help, see:

- Configuring EMR Help
- Create requests within your EMR system
- Resolve EMR Help requests
- EMR Help reference

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.

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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 isn't 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

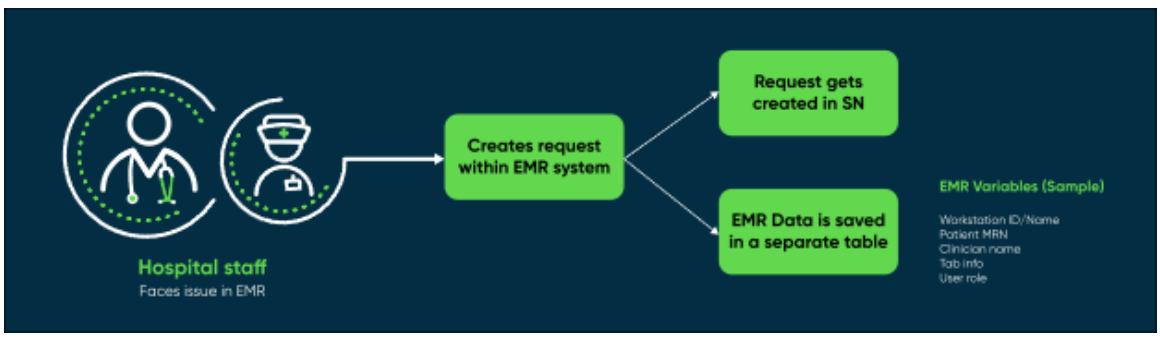
Configuring EMR Help

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

Configuration overview

Configuring EMR Help involves installing the application, then setting up user access and data.

Hospital staff using the EMR system often encounter various challenges. In the event of an issue, they can initiate a service request directly from within the EMR system. Once a service request is created, the system automatically generates an incident in their ServiceNow instance.



Simultaneously, relevant EMR variables, such as workstation ID, patient details, clinician information, and the specific screen involved, are fetched from the EMR system and stored in a dedicated table within the EMR Help application. This additional information enhances the service request, providing fulfillers with crucial details for effective troubleshooting.

- Install EMR Help.

  Install the EMR Help application to integrate your ServiceNow instance with an EMR system.

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- Configure the data table for a request type.

  Review the data table associated with an IT request, such as the EMR Incident Data [sn_ind_rmt_help_incident_data] table. Then, make sure that the table has columns to store each system variable that you're planning to fetch from an EMR system. Add new columns corresponding to the system variables that don't exist in the table.

  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.

  For more information, see EMR Help data model.

- Configure request parameters for EMR systems.

  Configure the remote request parameters for an EMR system.

- 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 to fulfill service requests made from the EMR Help portal.

  The base healthcare case type [sn_hcls_case] is an abstract case type that 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

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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.

- (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.

Additional configuration information

- 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 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

- Confirm 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.
- Confirm 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 can't find the application, you might have to request it from the ServiceNow Store.

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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.

   If dependent plugins and applications are listed then they will be installed, are currently installed, or need to be installed. If any plugins or applications must be installed, you must install them before you can install the 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 are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.

5. Select **Install**.

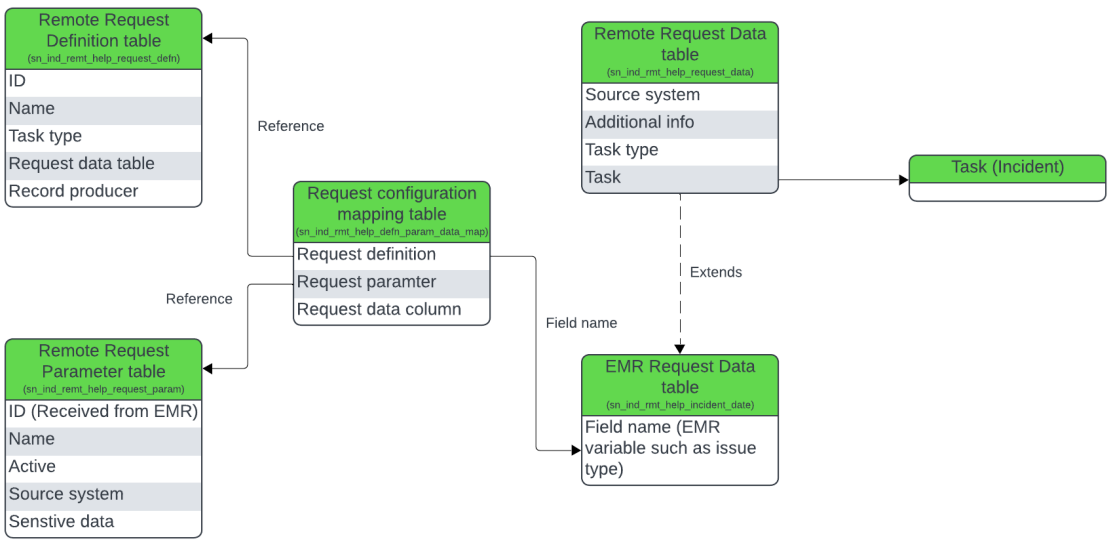
EMR Help data model

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:

- ServiceNow AI 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

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- EMR Request Data table
- Request configuration mapping table

Configure the data table for a request type example

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're planning to fetch from an EMR system.

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

You would confirm 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 doesn't 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**.

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 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.

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- 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	Unique identifier for the request definition. **Note:** You can't modify an ID after the request definition is created.
Name	Name to identify the request definition.
Task type	Task table associated with the IT service request. For example, Incident [incident] table.
Request data table	Data table to store additional data from the EMR system. Additional data might include environment, workstation, and other data from the EMR system.
Record producer	Record producer to modify the fields in a task record and make them available on an IT service request form. You use a record producer with a dedicated service portal.
Rest API Task Parameters	
Parameters of scripted REST APIs. You can 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.
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.

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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**.

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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.

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. **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	EMR system to which the parameter is mapped. The source system types with which the parameter can be associated are: - **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. **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.

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Field	Description
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.

> **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	View details of the EMR data associated with a ServiceNow service request. **Note:** Assign the sn_ind_rmt_help.viewer role to agents who 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.

Procedure

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

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- 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 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 walk you through creating a 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.

Set your scope to Healthcare and Life Sciences Service Management Core.

About this task

https://player.vimeo.com/video/973253728?h=8dc20844dc&badge=0&autopause=0&player_id=0&app_id=58479

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

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- Can delete: True
- Allow configuration: True

6. Right click in the header and select **Save** to save your updates.
7. Click on the Additional Actions icon in the top left and click **Configure** > **Dictionary**.
8. In the Dictionary Entries list view, locate the dictionary entry for the caste type you created by entering as follows into the corresponding column search fields:
   a. Table: sn_hcls_emr_case
   b. Type: collection
9. Open sn_hcls_emr_case.
10. Set **Audit** to true.
11. Click **Update**.

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

Set your scope to EMR Help.

About this task

https://player.vimeo.com/video/952157336?h=d1a1aa4aa1&badge=0&autopause=0&player_id=0&app_id=58479

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 newly created healthcare case type.
   For example, **EMR Case**.
4. Click **Update**.
5. Click **Proceed**.

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.

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Before you begin
Role required: admin

Set your scope to EMR Help.

About this task

https://player.vimeo.com/video/973253782?h=17b93aad2b&badge=0&autopause=0&player_id=0&app_id=58479

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 **Update**.

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 to display EMR session information.

Before you begin
Role required: admin

Set your scope to Healthcare and Life Sciences Service Management Core.

About this task

https://player.vimeo.com/video/973253823?h=bba8a55e50&badge=0&autopause=0&player_id=0&app_id=58479

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
   ```

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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

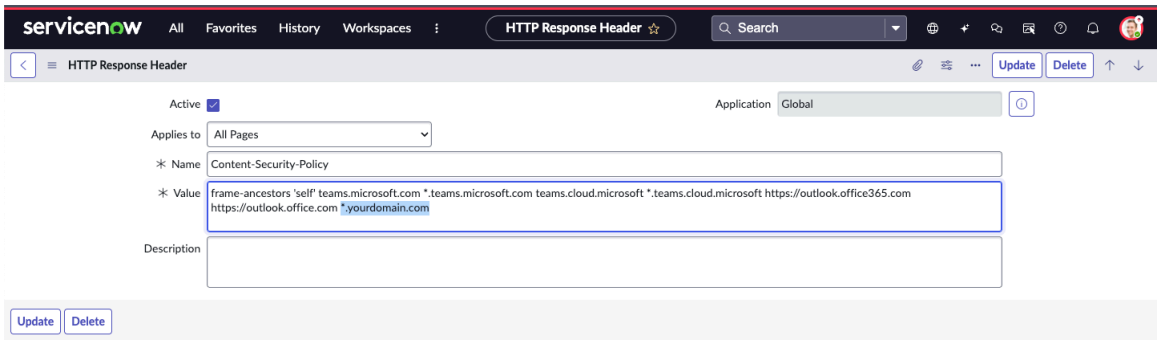
For any ServiceNow page or portal to be launched within an iframe, an HTTP Response Header must be configured with the correct content security policy. This content security policy dictates which third party websites can load a ServiceNow page or portal inside an iframe.

Procedure

1. Set your scope to **Global** and elevate your role to **security_admin**.
2. Navigate to **All** > **HTTP Response Headers** (or type in sys_response_header.list).
3. Select the **Global** response header.
4. Add the domain name for your Epic hyperspace instance to the list of values.
   For example, *.yourdomain.com
5. Confirm that **Active** is set to true.
6. Select **Submit**.

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Result



What to do next

For additional configuration steps within Epic, see the How to configure EMR Help to launch within an iFrame in Epic's 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.

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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. 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.

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=V`* .

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For example, `https://<instance name>.service-now.com/emr-assist?id=emr_assist_home_page&sysparm_source=epic&sysparm_ws=Workstation&sysparm_vironment`.

> **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.

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.

     > **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.

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EMR system customizations

Customization	Implementation
Incoming task parameters	Include the *transformIncomingTaskParams* method in the *sn_ind_rmt_help.RemoteHelpParamTransformer* 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 *transformOutgoingTaskParams* method in the *sn_ind_rmt_help.RemoteHelpParamTransformer* 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 *transformURLParams* method in the *sn_ind_rmt_help.RemoteHelpParamTransformer* extension point. This method is called from a service portal before storing the URL parameters. **Note:** If your EMR system has an encryption algorithm, you can configure the *Incoming URL parameters* method in the *sn_ind_rmt_help.RemoteHelpParamTransformer* extension point to decrypt any encrypted task parameters from your ServiceNow instance.

5. On the Extension Point form, click **Update**.

Create requests within your EMR system

You can request service directly within the EMR system which automatically creates a service request in a ServiceNow instance

Work on task records that are automatically created when clinicians submit ServiceNow service requests from an EMR system. Incidents are the task type configured by default with the EMR Help application.

As a fulfiller, for example, if you are an IT agent or a healthcare agent, you can access the task record for a service request on the ServiceNow instance linked with the EMR system.

Incidents are the task type configured by default with the EMR Help application. Ensure an administrator has added the EMR Incident Data related list to the Incident form.

Note:
The EMR Request Data related list of an incident form includes any EMR system-specific data. The EMR Request Data related list data is viewable only if you have the sn_ind_rmt_help.viewer role and the ITIL role. This related list appears empty if you do not have the required roles.

Use EMR Help for the following:

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- Submitting ServiceNow IT service requests from EMR systems
- Creating healthcare cases from within your EMR

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 you EMR system.

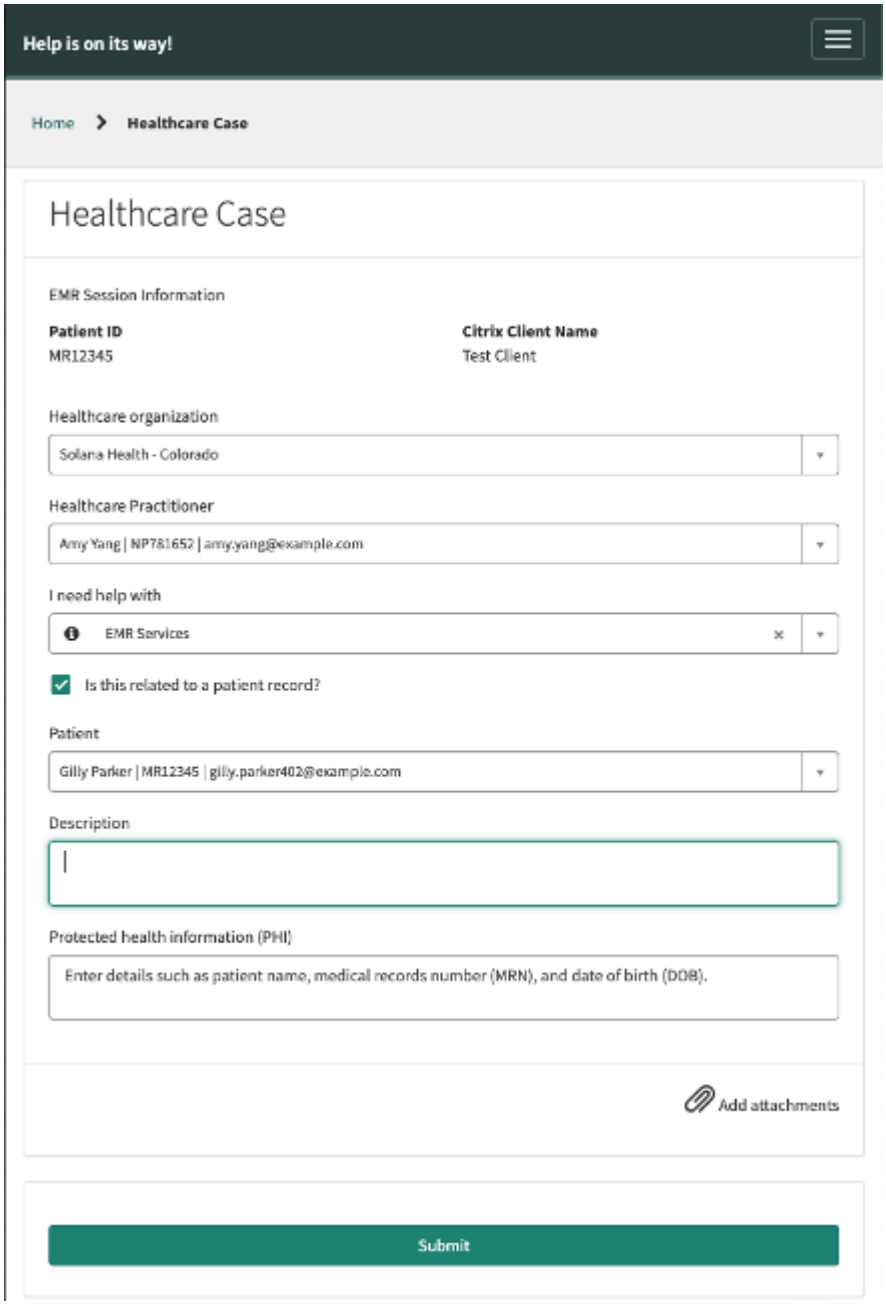
As a user with the sn_ind_rmt_help.requester role, you can submit healthcare cases from within your EMR system. These cases can then be fulfilled within a ServiceNow instance.

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.

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Healthcare Case fields

Field	Description
EMR session information	EMR session information will displays the values for any configured parameters that have been captured from EMR. 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.

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Healthcare Case fields (continued)

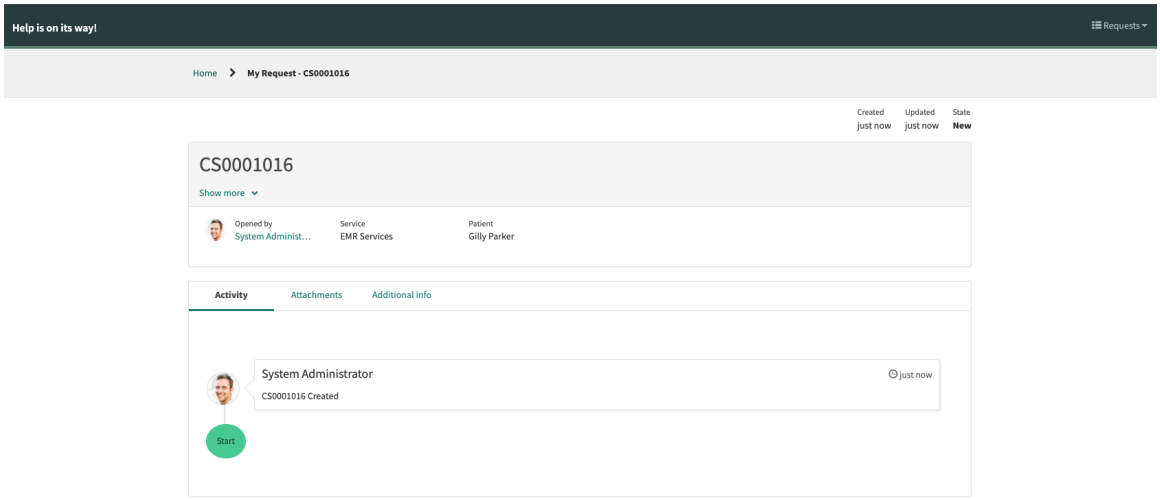
Field	Description
	These fields populate automatically and are read only.
Healthcare organization	The healthcare organization associated with this healthcare case. This field populates automatically based on user's associated organization.
Healthcare practitioner	The healthcare practitioner associated 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.

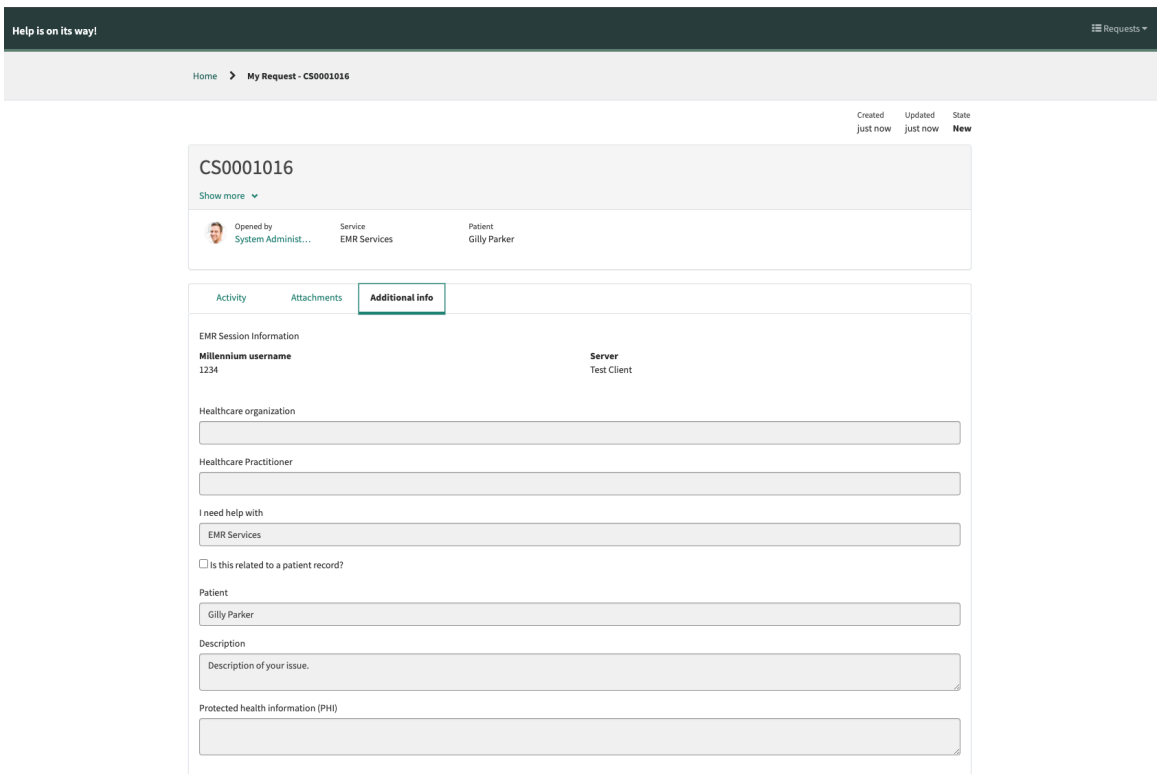
Submitted Healthcare case information

After submitting your Healthcare case, you can review the information you submitted directly from the portal.

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- 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.



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.

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To interact with Virtual Agent, simply click the chat window icon on the bottom right-hand corner of the screen.

For more information on Virtual Agent, see Virtual Agent as an application design element.

Resolve 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 fulfiller, 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.

Use EMR Help for the following:

- Viewing and resolving ServiceNow IT service requests submitted from EMR systems
- Viewing and resolving healthcare cases submitted from EMR systems

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

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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

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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.

   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

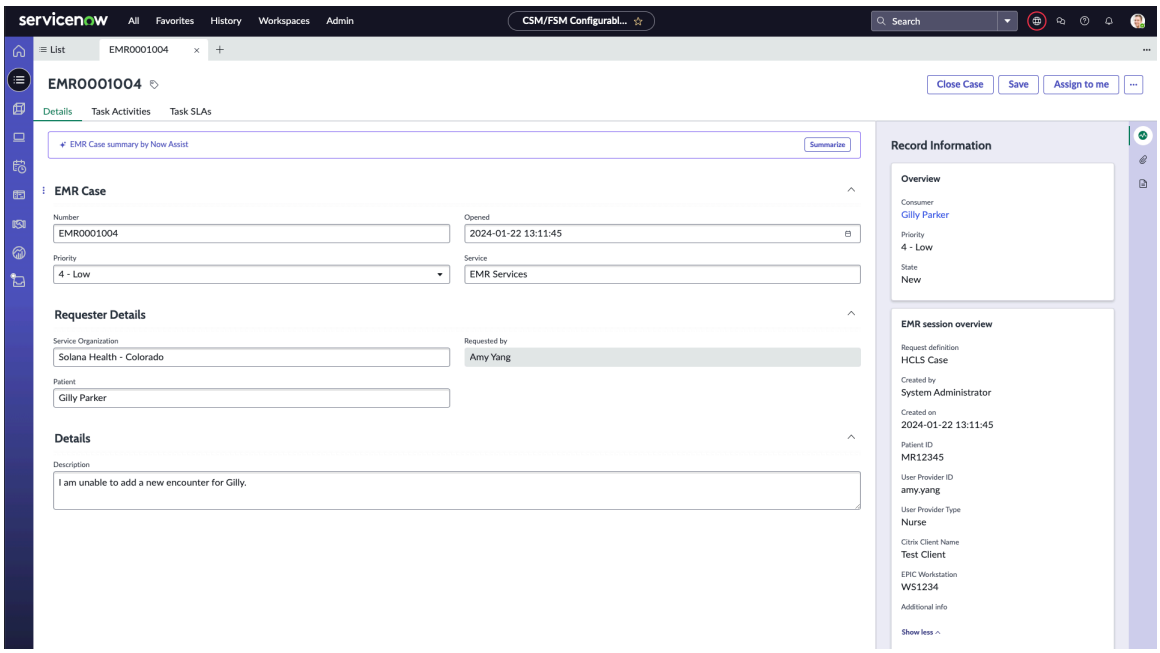
Use Workspace in a ServiceNow instance to work on healthcare cases created from an EMR system.

View and resolve an EMR healthcare case from Workspace

Use Workspace to fulfill healthcare cases generated from EMR Help.

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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.

Resolve a healthcare case using CSM/FSM Configurable Workspace

Use Workspace in a ServiceNow instance to work on healthcare cases created from an EMR system.

Before you begin

Role required: sn_ind_rmt_help.viewer

Procedure

1. Navigate to **Workspace** > **CSM/FSM Configurable Workspace**.
2. Select the **List** icon and then navigate to **Cases** > **All**.
3. Select the EMR case that you want to work on.
4. Review and the case using the **Details** tab.

> **Note:**
>
> Information from the EMR request is captured in the **EMR session overview** contextual side panel.

5. To close the EMR case, scroll to the **Closure Information** section.
6. In the **Closure Information** section, complete the form fields.
7. Select **Close Case**.

EMR Help reference

Reference topics provide additional information about EMR Help features.

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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 ServiceNow AI 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.

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.

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.

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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
sn_ind_rmt_help.viewer	View details of the EMR data associated with a ServiceNow service request. **Note:** Assign the sn_ind_rmt_help.viewer role to agents who 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.	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]	Provides basic fields for IT service requests. You can extend this table to include more data from an IT service request. Each remote request parameter has a corresponding column in this table.
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.

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Tables installed in EMR Help (continued)

Table	Description
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.

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Role required to configure the table: sn_ind_rmt_help.admin.

Remote request definition form fields

Field	Data type	Description
Record Producer	Reference	Represents the record producer associated with the remote request definition. For more information, see Create a record producer
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	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 the following associated request definition: **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.

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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.
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. **Note:** Fields marked as true should only be mapped to data columns that have column level encryption enabled.
Source system	String	Represents the EMR system that this parameter supports. 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 the captured parameter data associated with 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.

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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	This field is used to store any additional sensitive information when submitting a request from the EMR. This field has column-level encryption.
Created	Date/Time	Date and timestamp 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	Represents the EMR system that this request came from. IE, Epic. **Note:** If this value is unknown, it means that no source system was provided when the record was created.
Sys ID	Sys ID (GUID)	Unique sys_id every table has.

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Remote request data form fields (continued)

Field	Data type	Description
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 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 the captured parameter data associated with 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

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Remote request data form fields (continued)

Field	Data type
Issue type	String
Millennium user name	String
Phone extension	String
Position	String
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 display in the contextual sidebar.

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Request configuration mapping form fields (continued)

Field	Data type	Description
Request data column	Field Name	The field on the task type table that is 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.

EMR Help 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.

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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 isn't 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.

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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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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.
Complete  Complete your to-do items for enrollment requests.	Training request appointments  Book appointments for enrollment training requests.	Contribute  Create enrollment cases as a contributor.
Reference  Get details about components including tables and properties.		

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.

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Patient Support Services overview

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

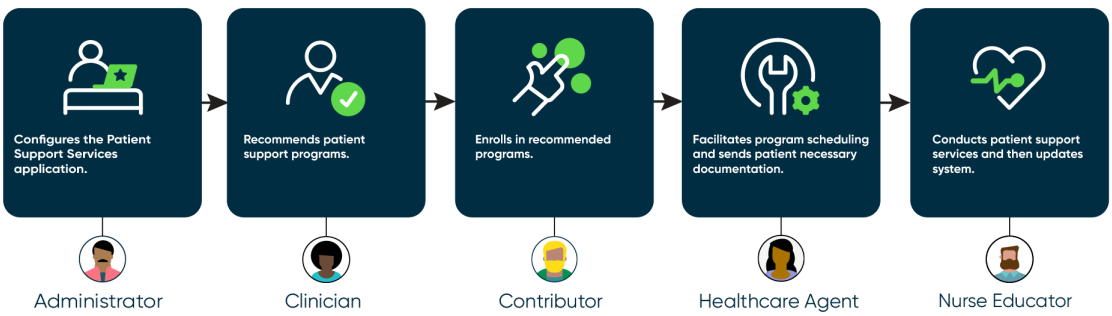
For patients, make onboarding easy for any therapy and promote adherence for better health outcomes.

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.

Patient Support Services workflow



In the Patient Support Services workflow:

1. An administrator configures the Patient Support Services application.
2. A clinician recommends patient support programs.
3. A contributor enrolls in the recommended programs.
4. A healthcare agent facilitates program scheduling and sends patient necessary documentation.
5. A nurse educator conducts patient support services and then updates system.

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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.	Manage enrollment requests in Workspace	Care Coordinator
Book appointments for support programs and complete to-do items assigned to you as a patient.	Complete to-do items for Patient Support Services	Patient
Book appointments for enrollment training requests.	Booking appointments for Patient Support Services	Care Coordinator

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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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 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:

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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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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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.

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Patient Support Services configuration tasks (continued)

Task	Description
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.
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

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

- Confirm 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

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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

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

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Roles installed in Patient Support Services (continued)

Role	Description	Contains roles
	Note: By default, the sn_patientservice.nurse_educator role is assigned to the members of the Nurse Training Support assignment group.	
sn_patientservice.case_creator	Creates enrollment cases for all associated objects.	sn_patientservice.case_viewer
sn_patientservice.agent_connector	Views, creates, and updates enrollment cases for all associated objects. 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.	• 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	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.	• sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewe • sn_patientservice.case_task_v • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_view • sn_hcls.health_insurance_data • sn_patientservice.case_viewer • sn_hcls.revenue_cycle_data_vi • sn_patientservice.case_creato
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 ServiceNow AI Platform user administration feature.

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- 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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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 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.
Program service item [sn_patientservice_program_service_item]	Stores the details of the program service item tasks associated with a program service.

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Patient Support Services application tables (continued)

Table	Description
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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

To access document templates from the Patient Support Services application, as an administrator, you must approve the required RCA privileges. For more information, see Approve restricted caller access privileges for Healthcare and Life Sciences Service Management.

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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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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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 `createPatient` method of the `EnrollmentCaseServiceExtPoint` extension point in the implementation.
Create a member plan if none exist.	Include the `createPatient` method of the `EnrollmentCaseServiceExtPoint` extension point in the implementation.
Create a practitioner record if none exist.	Include the `createPatient` method of the `EnrollmentCaseServiceExtPoint` 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.

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Before you begin

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Configuring an appointment booking setting for Patient Support Services

Enable patients to book an appointment for the training requests conducted by nurse educators.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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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

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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	Task table for which the appointment is created.

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Field	Description
	The Patient service training [sn_patientservice_training_task] table is the default table for the Patient Support Services training tasks.
Availability Method	Method to determine the appointment availability. An availability method is one of the following types: **Number of appointments per slot** 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. **Scripted** Script to determine the number of available appointments per time window.
Advanced Calendar view for Portal	Option to display the advanced calendar view for available appointments in the Select Appointment window on the patient portal. The advanced calendar view displays appointments categorized in different time slots of the day, such as morning, afternoon, and evening.
Active	Option for activating the application configuration and enabling the appointment booking.
Auto acceptance	Option to enable the auto-acceptance of the training tasks by an agent. For Patient Support Services, clear the Auto acceptance check box because the appointment for a training task is booked by a patient.
Calendar View	View of the available appointments in the Select Appointment window on the patient portal for a single day or for a week.
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.

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- 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

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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Field	Description
	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 *`Program service appointment`* record producer for the **Program service appointment** configuration.
Location	Field in the record provider that determines the appointment location.
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.

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Field	Description
	A reference field that looks for a `sys_user` 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.
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.

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Field	Description
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	Option for scheduling a break for each bookable day. If you select the **Include daily break** check box, you can then specify the break start and end times in the boxes that appear.
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

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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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.
Appointment window	Duration of the appointment window.

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Field	Description
	Note: Allow enough time for the training to be started and completed within this window.
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.
Include daily break	Option for scheduling a break for each bookable day. If you select the **Include daily break** check box, you can then specify the break start and end times in the boxes that appear.
Appointment booking preview	Preview of the appointment windows and times based on the selected start and end times, break time, and appointment window.

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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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**.

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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. **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.

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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 Configure 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

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navigating to **All** > **HCLS Service Management** > **Administration** > **Document decisions**. For more information, see Configure 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.

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

As a user with the admin role, you can create a playbook by using Playbooks, a ServiceNow AI 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.

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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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	Creates and fulfills enrollment cases in the agent's business location. **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 [sn_csm_service_organization_member] table.	sn_patientservice.agent_connector and sn_customerservice.svc_location_consumer_agent

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.

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Example contributor profiles for Patient Support Services

Profile	Description	Assigned roles
Relationship contributor	Creates enrollment cases for only those patients with whom a relationship is established. For more information, see Create relationships. **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.	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	Creates enrollment cases for any patients in a particular service organization (business location) with which the user is associated as a service organization member. **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.	sn_patientservice.contributor, sn_customerservice.service_organization_contrib 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.

Important:

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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 #.

Create enrollment cases as a contributor

Create enrollment cases for your patients from a service portal as a user with the contributor profile.

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Manage enrollment requests in Workspace

As a care coordinator or a nurse educator, you can use Workspace to manage enrollment requests or training tasks, respectively.

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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Enrollment request workspace managing tasks (continued)

Task	Description
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.

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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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 View 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

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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

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- 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.

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Enrollment case states

State	Description
New	Enrollment case is created but not yet assigned to anyone.
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.

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Enrollment case states (continued)

State	Description
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.

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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 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.

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Patient information displayed for an enrollment case (continued)

Details	Description
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.
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.

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Patient information displayed for an enrollment case (continued)

Details	Description
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.

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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Patient Support Services playbook stages (continued)

Stage	Description
	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.

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.

   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

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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.

> **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.

> **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

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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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

The home page of the Workspace provides an overview of the training tasks assigned to you and your groups.

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

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.

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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.

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Before you begin

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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Complete to-do items for Patient Support Services

View and complete all to-do items assigned to you as a patient from the patient portal.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

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Patient Support Services reference

Reference topics provide additional information about Patient Support Services components.

Important:

Starting with the Yokohama release, Patient Support Services is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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. **Note:** By default, the sn_patientservice.nurse_educator role is assigned to the members of the Nurse Training Support assignment group.	sn_hcls.practitioner

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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	Views, creates, and updates enrollment cases for all associated objects. 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.	• 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	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.	• sn_hcls.clinical_data_viewer • sn_hcls.foundation_data_viewe • sn_patientservice.case_task_v • sn_hcls.patient_data_viewer • sn_hcls.practitioner_data_view • sn_hcls.health_insurance_data • sn_patientservice.case_viewer • sn_hcls.revenue_cycle_data_vi • sn_patientservice.case_creato
sn_patientservice.sm_agent	Accesses and views all data related to enrollment requests as a care coordinator.	sn_patientservice.case_creator

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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.

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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 an enrollment case state changes to **Closed incomplete** or **Canceled**.

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Business rules installed in Patient Support Services (continued)

Business rule	Table	Rule criteria	Description
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 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`

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Business rules installed in Patient Support Services (continued)

Business rule	Table	Rule criteria	Description
			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.

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Patient Support Services 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.

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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.

Patient Support Services Work ATF (Automated Test Framework) tests

The following ATF tests are available in Patient Support Services as a part of the Patient Support Services Workspace ATF test suite.

Patient Support Services Workspace ATF test suite

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

This test suite for Patient Support Services Enrollment Case ensures that enrollment actions are functional via the CSM/FSM configurable workspace. The following three tests are included within this suite:

1. PSS - Assigning enrollment case: Assign enrollment case to healthcare agents who are logged-in.
2. PSS - Updating enrollment case: Update enrollment cases after adding additional comments.
3. PSS - Close enrollment case: Close enrollment cases after adding resolution details.

For more information on the Automated Test Framework, see Exploring Automated Test Framework.

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.

Important:

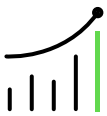
Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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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 Pre-Visit Management.	Configure  Plan and configure your implementation.	Manage  Manage procedure requests from the Workspace.
Complete  Complete your to-do items for procedure requests.	Contribute  Create procedure request cases as a contributor.	Reference  Get details about components including tables and properties.
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.

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Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

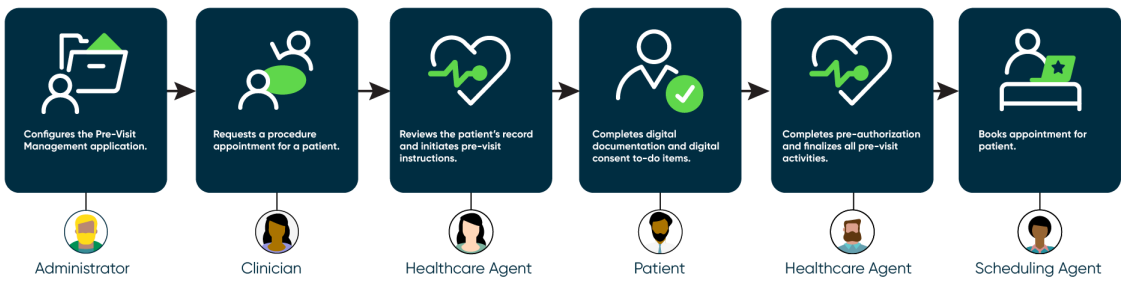
Make it easy for patients to digitally review and sign all the required paperwork for procedure scheduling requests by using the Pre-Visit Management application.

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.

Pre-Visit Management workflow



In the Pre-Visit Management workflow:

1. An administrator configures the Pre-Visit Management application.
2. A clinician requests a procedure appointment for a patient.
3. A healthcare agent reviews the patient's record and initiates pre-visit instructions.
4. A patient completes digital documentation and digital consent to-do items.
5. A healthcare agent completes pre-authorization and finalizes all pre-visit activities.
6. A scheduling agent books appointment for patient.

Benefits

Pre-Visit Management provides the following benefits:

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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 digital documentation and digital consent.	Completing to-do items from the patient portal	Patient
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.

Important:

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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 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.

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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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

The following table provides an overview of the configuration tasks required for Pre-Visit Management.

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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.

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.

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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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Before you begin

- Confirm 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.

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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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

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Roles installed with Pre-Visit Management (continued)

Role	Description	Contains roles
sn_previsit.agent_connector	Views, creates, and updates procedure request cases for all associated objects. 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 Pre-Visit Management.	• sn_hcls.healthcare_agent • sn_previsit.sm_agent
sn_previsit.case_viewer	Views all procedure request cases available in the application.	None
sn_previsit.contributor	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.	• 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	sn_previsit.case_creator

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Roles installed with Pre-Visit Management (continued)

Role	Description	Contains roles
	patient service representative.	

Procedure

Assign roles to users and groups using the ServiceNow AI 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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

To access document templates from the Pre-Visit Management application, as an administrator, you must approve the required RCA privileges. For more information, see Approve 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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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**.

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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**.

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

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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 Configure 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 Configure 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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

As a user with the admin role, you can create a playbook by using Playbooks, a ServiceNow AI 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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Pre-Visit Management includes the following email notifications.

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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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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 fulfiller 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.

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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	Creates and fulfills procedure request cases in the agent's business location. **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.	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	Creates procedure request cases for only those patients with whom a relationship is established. For more information, see Create relationships.	sn_previsit.contributor and sn_customerservice.relationship_contributor

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Example contributor profiles for Pre-Visit Management (continued)

Profile	Description	Assigned roles
	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.	
Patient contributor	Creates procedure request cases for any patients.	sn_previsit.contributor and sn_customerservice.consumer_contributor
Location contributor	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. **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.	sn_previsit.contributor, sn_customerservice.service_organization_contrib 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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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Procedure request workspace managing tasks (continued)

Task	Description
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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

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requests. For more information, see View 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

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

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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.

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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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 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.

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Patient information displayed for a procedure request case (continued)

Details	Description
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.
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.

Important:

Starting with the Yokohama release, Pre-Visit Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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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:

1. **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.
2. **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.
3. **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

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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.

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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

Important:

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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**.

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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.

Important:

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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.

Pre-Visit Management reference

Reference topics provide additional information about Pre-Visit Management components.

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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.

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

Demo data is available for this feature.

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 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	Views, creates, and updates procedure request cases for all associated objects. You can combine this role with other roles for a user with the agent connector profile. For more	• sn_hcls.healthcare_agent • sn_previsit.sm_agent

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Roles installed with Pre-Visit Management (continued)

Role	Description	Contains roles
	information, see Determining additional user profiles in Pre-Visit Management.	
sn_previsit.case_viewer	Views all procedure request cases available in the application.	None
sn_previsit.contributor	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.	• 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

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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

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Business rules installed with Pre-Visit Management (continued)

Business rule	Table	Rule criteria	Description
			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	Procedure request [sn_previsit_procedure_request]	Before query	Enables patients to view their procedure request cases.

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.

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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	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. • Type: Integer • Default value: 3 • Location: System Property [sys_properties] table • Learn more: Configure when to send the procedure consent form to a patient

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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.

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For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Pre-Visit Management 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.

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Get started

Explore  Learn about how clinicians and healthcare providers use Vaccine Administration Management.	Configure  Plan and configure your implementation.	Register  Use the Patient Portal to register for a vaccination.
Manage  Use the Clinician Portal to find and manage vaccination appointments for users	Reference  Get details about components like fields, tables, and properties.	

Notice regarding use by organizations

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Troubleshoot and get help

- Ask questions and explore other resources in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

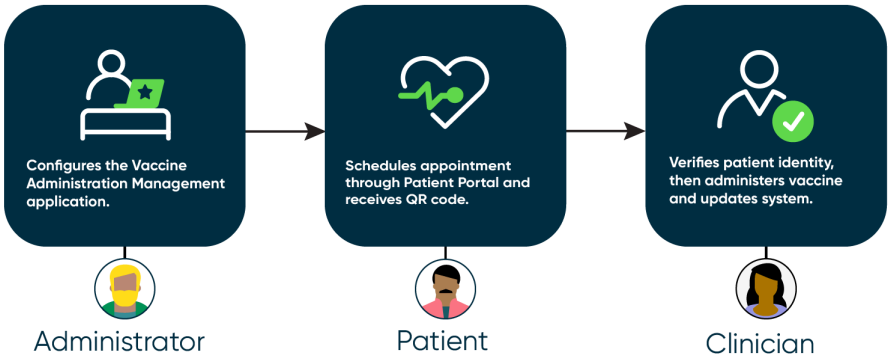
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Exploring Vaccine Administration Management

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.

Vaccine Administration Management workflow



In the Vaccine Administration Management workflow:

1. An administrator configures the Vaccine Administration Management application.
2. A patient schedules an appointment through the Patient Portal and receives a QR code.
3. A clinician verifies the patient's identity, then administers the vaccine and updates the system.

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.	Use the Patient Portal to register for a vaccination program	Patient
Users can learn more about vaccines and schedule vaccinations through a self-service portal that is accessible from mobile devices or web browsers.	Use Clinician Portal to find and manage vaccination appointments for users	Clinician
View vaccine appointments by day, week, and month. View scheduled, completed, and	Vaccine Administration Management dashboard	HCLS Manager

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Vaccine Administration Management benefits (continued)

Benefit	Key feature	Role
no-show appointments, as well as filter appointments by the vaccine center, date, method, and clinician.		

Configuring Vaccine Administration Management

Complete all configuration tasks to ensure that Vaccine Administration Management is set up correctly for your organization.

- Install Vaccine Administration Management
- Create vaccine models
- Create vaccine consumable assets
- Create vaccination programs
- Configure the eligibility criteria for a vaccination program
- Configure advanced appointment scheduling for a center
- Guidance for configuring advanced appointment scheduling for a vaccination center
- Configure inventory-based scheduling for a center
- Configure vaccine appointment scheduling
- Multi-vaccine appointment bookings configuration
- Book appointments for subsequent doses after a previous dose is complete
- Privacy policy settings for Vaccine Administration Management
- Customize vaccination notification emails
- Mass book vaccine appointments
- Cancel appointments in a given date range
- Vaccine Administration Management system properties
- Configure the Patient Portal for Vaccine Administration Management
- Turn off automatic email notifications for mass booking
- Configure an appointment reminder and pre-appointment questionnaire
- Virtual Agent conversations for Vaccine Administration Management
- Retry booking for skipped appointment records
- Encrypt search fields to appear in search assist
- Manage high number of concurrent bookings
- Manage processing for a high number of concurrent vaccine events
- Configure the questionnaire text for the user and clinician portals
- Configure VAM property to enable scoped caching
- Encryption options in Vaccine Administration Management

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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 Field Encryption for the tables under the Vaccine Administration Management application. However, it isn't 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 Field Encryption Enterprise, customers must purchase the Field Encryption Enterprise SKU. If the customer doesn't share data contained in the Field Encryption Enterprise encrypted fields between instances, then the customer can install and activate Field Encryption Enterprise on a single instance (and not on all account instances). To avoid fees for using Field Encryption Enterprise, existing ServiceNow customers can use Field Encryption 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**.

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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 use 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 don't contain sensitive data. Sensitive data can be data such as an instance for testing that contains only dummy data.

5. Enable Field Encryption Enterprise.
   a. Go to Now Support and choose **Service Catalog** from the menu.
   b. Click **Activate Plugin**.
   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.
   g. In the **Select Maintenance Start Time** field, select a start date and time value.
   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**.
   e. Click **Generate Key**.

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A key is created in the Module Keys related list on the sn_vaccine_sm.vm_crypto_module crypto module record.

Note:
To view the fields that are encrypted, navigate to **System Security** > **Field Encryption** > **Encrypted Field Configurations**.

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.

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 *glide.cmdb_model.display_name.shorten* 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 can't be used to create reports.

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Field	Description
Asset tracking strategy	The process by which the model can be tracked. Choose from the following: ○ **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.
Depreciation	The depreciation 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: ○ **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 ongoing expenditure. For example, toners for the photocopier.
Certified	The option that determines whether the model is approved for use.

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Field	Description
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	Number 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.

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Field	Description
Expenditure type	Type of expenditure. Choose from the following options: ○ **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 ongoing expenditure. For example, toners for the photocopier.
Substate	Substate 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	
Disposal reason	Text explaining why the asset is being retired.
Beneficiary	Organization that receives the asset when it's retired.
Resale price	Value of the asset when it's 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.

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Before you begin
Role required: sn_vaccine_sm.manager

About this task
To manage flu or infectious diseases, such as 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.
Catalog item	Schedule vaccine appointment
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**.

   Note:

   If necessary, 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.

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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. **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.

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Field	Description
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**.

> **Note:**
> If you want to create your own record producer or an alternative to "Schedule your vaccination", don't update the catalog item of the program with the new record producer at this stage. "Schedule your vaccination" is the user-facing record producer which enables users to schedule vaccines in the Patient Portal. The catalog item should always remain "Schedule vaccine appointment" even when you create a non-OOTB program. For more information, see the Schedule and manage your vaccinations section of Use the Patient Portal to register for a vaccination program.

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
The 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 are 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 are 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**

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Configuration property (*sn_vaccine_sm.enable_vam_appointment_config*) is selected.

> **Warning:**
> Once you have enabled the property and your advanced appointment scheduling configurations are live, avoid disabling the property to help 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. You can configure 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.

> **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.

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Field	Description
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 the 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.
Active	Option to activate the appointment configuration for use. If enabled, then the appointment configuration applies for both self-scheduled and mass booked appointments. **Note:** Only one appointment configuration can be active at a time.

7. Select and hold (or 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.

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Field	Description
Appointments according to window	Number of appointments according to 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.
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. The configuration is used to identify the available slots as well as a location's capacity for a given day. The configuration enables 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.

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The following forms and tables provide some helpful guidance for handling advanced appointment scheduling configurations for a vaccination center. They also provide some of the impacts of making certain changes. However, this guidance doesn't address an exhaustive list of all possible side effects.

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	Don't add a new holiday schedule when there are existing appointments in the current location. It invalidates existing appointments. Don't add more holidays to the existing holiday schedule. New holidays may already contain booked appointments.
Appointment duration	• Don't 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: **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.

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Vaccination Appointment Configuration form (continued)

Field	Recommendation and Impact
Lead time	You can change the lead time value without impacting any existing appointments.
Future bookable max days	• Don't 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	• You can conditionally change the value. • If there's any workflow that impacts existing appointments or users, it isn't safe to change the value.
Active	• Don't 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

Field	Recommendation and Impact
Name	You can change the name field without causing undesired side effects.
Start date	• Don't 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:

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Vaccination Schedule form (continued)

Field	Recommendation and Impact
	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	• Don't 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	• Don't set the number of appointments per window to 0. • Increase the number of appointments per window. • Don't decrease the number of appointments per window for a service configuration when appointments have already been created. • Note the 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: 1. 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. 2. New configuration: You have 2 appointments per window. If you have

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Vaccination Schedule form (continued)

Field	Recommendation and Impact
	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. 3. With this configuration, the total capacity, 8, exceeds the new total capacity of 4, causing overbooked appointments.
Daily start time	Don't modify the daily start time when appointments are already present. Modification creates overbooked slots and invalidates previous appointments.
Daily end time	• You can increase the daily end time. The increase is only valid when the appointment duration and daily start values aren't changed. • Don't make the daily end time earlier when appointments are already present. Doing so creates overbooked slots and invalidates previous appointments.
Bookable days	• Adding days without impacting existing appointments. • Removing the bookable days when appointments have already been created invalidates past appointments. • For example: 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 isn't bookable, any appointments previously booked for Saturday are no longer valid.
Include daily break	• Don't change the value of the **Include daily break** check box. • Don't add the daily break time if this check box is cleared. • Don't change the duration of the break.

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Vaccination Schedule form (continued)

Field	Recommendation and Impact
	• Don't set the break start time and end time to be the same as the daily start time and daily end time because it won't 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 have enabled the property and your inventory-based configurations are live, avoid disabling the property to help 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. You can 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 isn't 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.

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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.
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: ▪ **Not available** ▪ **Available**

c. Select and hold (or 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

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begins on Monday, then it's evenly distributed over the next seven business days (Monday through Friday of that week, and then the following Monday and Tuesday).

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 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.
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. Select and hold (or right-click) the form header and click **Save**.

   e. In the Availability By Lot related list, click **New**.

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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, like 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. If the automatically scheduled time isn't convenient, the users can select a different appointment time in the portal.

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.

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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 can't 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're 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 aren't in this age group, you won't 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.

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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's 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.

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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	If there's no appointment slot available at the user's preferred center, it's the maximum distance, in miles, that is searched for an available vaccination location. The default value is **50**.
sn_vaccine_sm.vaccine.management.booking.distance_unit	The unit of measurement for the distance considered for vaccine appointment mass booking. The options are **mi** and **km**.

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System property table (continued)

Property	Description
	The default value is **mi**.
sn_vaccine_sm.vaccine.management.booking.max_locations	If there's no appointment slot available at the user's preferred location, it's the maximum number of alternate locations that are searched for a vaccination. A higher value for this property increases the time that it takes to complete mass booking. The default value is **5**.

Role required: sn_vaccine_sm.admin and admin

About this task

Important:
Mass booking doesn't currently support inventory-based scheduling.

Procedure

1. Create a temporary table.
   The table should be either:
   - Extend sys_user.
   - 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 like 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**.

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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 aren't scheduled yet.
   - If a consumer or patient record doesn't 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**.
4. 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.

Configure the Patient Portal for Vaccine Administration Management

Complete all configuration tasks to confirm that the Vaccine Administration Management (VAM) Patient Portal is set up correctly for the user.

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Important:

Starting with the Yokohama release, Vaccine Administration Management is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.
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 the 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.

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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 can't 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 aren't 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.

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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 aren't 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:**
   > Don't configure the *task_id* and *is_portal* variables.

   d. Click **Update**.

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.

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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. Select and hold (or 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're using a multi-node instance, you can change the configuration to pin to a specific node by using the system ID

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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.

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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
		any_infections
Enter your personal info	Your demographic info	age_group

For details on how to configure a variable, see Service Catalog variables.

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 isn't 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

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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.

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**.

Using Vaccine Administration Management

Learn how users, clinicians, and provider admins use Vaccine Administration Management.

- Use the Patient Portal to register for a vaccination program
- Use Clinician Portal to find and manage vaccination appointments for users
- Vaccine Administration Management dashboard
- Manage user appointments as a clinician or a vaccine agent

Use 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.

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.

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Provide your personal information in the Patient Portal (continued)

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.

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.

View all of your upcoming appointments.

View the details of an individual appointment.

You can also:

- Reschedule an appointment

  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

  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.

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.

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Use 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.

Note:
The clinician portal is optimized for both tablet and mobile. However, the mobile view doesn't currently support the selection of more than one appointment at a time for bulk updates.

Find vaccination appointments

Screens of vaccination appointments

Description
Clinicians can find vaccination appointments by scanning the user's QR code, entering the code manually, or looking up the appointment in the portal. 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. Once the clinician selects a location, it remains selected throughout the session.

View and search appointments

Screens of view and search appointments

Description
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. **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.

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View and work on an appointment

Screens of view and work on an appointment

Description
Clinicians can view and work on an appointment record, including: • Verify the user's ID • Verify the user's details • Fill in screening questions • Verify that the vaccine is administered properly. 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 wasn't administered. • 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 **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.

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.

Required ServiceNow AI 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.

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Use cases of Vaccine Administration Management dashboard

User	Dashboard use
Vaccine Administration Management dashboard manager	Can view and edit the Vaccine Administration Management dashboard.
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.

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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 manage user appointments better, 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.

> **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 won't 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

> **Note:**
> A clinician or a vaccine agent can't create internal users and then book appointments on behalf of the users.

Role required: sn_vaccine_sm.clinician

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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 doesn't 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

Role required: sn_vaccine_sm.clinician

> **Note:**
> A clinician or a vaccine agent can't create an appointment on behalf of internal users.

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.

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5. From the consumer user record, select **Book Vaccine Appointment**.
   The **Book Vaccine Appointment** button isn't 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**.

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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**

Vaccine Administration Management reference

Reference topics provide additional information about Vaccine Administration Management features.

- Components installed with Vaccine Administration Management
- Vaccine Administration Management data model
- Domain separation and Vaccine Administration Management
- Integration with Healthcare and Life Sciences Service Management Core

Encryption options in Vaccine Administration Management

Vaccine Administration Management provides encryption support to secure sensitive information.

Encryption helps to prevent unauthorized users from viewing sensitive healthcare data.

The Field Encryption Enterprise option on the ServiceNow AI Platform is supported in the Vaccine Administration Management application.

Field Encryption Enterprise

Field Encryption Enterprise provides an enhanced encryption capability compared to Encryption Support and uses 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 Field Encryption Enterprise plugin (com.glide.now.platform.encryption). For more information about obtaining Field Encryption Enterprise, see Activate Field Encryption. 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

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Vaccine Administration Management encrypted fields (continued)

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
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

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Vaccine Administration Management encrypted fields (continued)

sn_vaccine_sm_request	long_term_health_issues

Virtual Agent conversations for Vaccine Administration Management

Virtual Agent conversations enable users to get help with the vaccination process.

If the Virtual Agent plugin (com.glide.cs.chatbot) is installed, the Vaccine Administration Management provides Virtual Agent conversation topics. 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	Enables users to book vaccination appointments through the chatbot. The questions asked in this topic are the default questions that a user must answer when booking an appointment in the self-service portal. **Note:** This topic is a placeholder conversation topic. You can change the questions according to your requirements.	Inactive
My Vaccination Phase Eligibility	Informs users about vaccination eligibility and enables users to book an appointment if the user is eligible. **Note:** This topic is a placeholder conversation topic. You can change the questions according to your requirements.	Active
COVID-19 Vaccine resources	Shows targeted Knowledge articles to the user. **Note:** To use this topic, you must activate the ServiceNow® Service Management Topic Blocks plugin (com.glideapp.cs.sm_topic_blocks). 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.	Inactive
COVID-19	Enables users to report vaccination status and COVID-19 test results using topic blocks.	Active

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Conversation topics (continued)

Topic	Description	Default status
	• **Report vaccination status**: Enables users to report the vaccination status. **Note:** This topic is a placeholder conversation topic. You can change the questions according to your requirements. • **Report COVID-19 test results**: Enables users to report COVID-19 test results. **Note:** This topic is a placeholder conversation topic. You can change the questions according to your requirements. 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. 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.

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	Enable or disable appointment slot choice. When set to **true**, users can choose the slot. When set to **false**, the system books an appointment automatically. The default value is **false**.
sn_vaccine_sm.self_booking_slot_fetch_count	Set 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. The default value is **1**.

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Vaccine Administration Management system properties (continued)

Property	Description
	Note: The system property only applies if the *sn_vaccine_sm.enable_appointment_slot_choice* value is **false**.
sn_vaccine_sm.vaccine.management.booking.distance_unit	Define the unit of measurement for the distance considered for vaccine appointment mass booking. The options are **mi** or **km**. The default value is **mi**.
sn_vaccine_sm.vaccine.management.booking.max_distance	Set the maximum distance, in miles, that is searched for an available vaccination location if there's no appointment slot available at the user's preferred center. The default value is **50**.
sn_vaccine_sm.vaccine.management.booking.max_locations	Set the maximum number of alternate locations that are searched for a vaccination if there's 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. The default value is **5**.
sn_vaccine_sm.vaccine.management.default_program	Define the default program for the Vaccine Administration Management portal.
sn_vaccine_sm.book_subsequent_doses	Enable 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. 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. The default value is **true**. For more information about booking subsequent doses, see Book appointments for subsequent doses after a previous dose is complete.
sn_vaccine_sm.enable_vam_appointment_config	Enable Vaccine Administration Management location-specific appointment scheduling configuration. The default value is **true**.

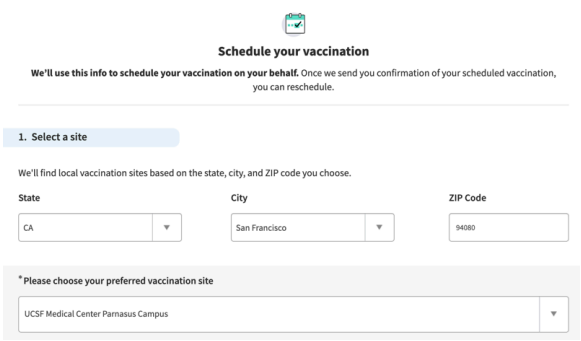
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Vaccine Administration Management system properties (continued)

Property	Description
	For more information about enabling location-specific appointment configuration, see Configure advanced appointment scheduling for a center.
sn_vaccine_sm.fetch_next_available_slot	Enable or disable fetching for the next available slot when opening the appointment booking calendar. The default value is **true**.
sn_vaccine_sm.strict_check_lead_time	Display the time after which the first available appointment slot is shown to the user. 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. 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. This system property affects mass booking. The default value is **true**.
sn_vaccine_sm.enable_self_registration	Enable or disable self-registration for booking appointments. 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. The default value is **true**.
sn_vaccine_sm.show_location_filters	Show or hide the location filters in the Schedule your vaccination page. 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.

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Vaccine Administration Management system properties (continued)

Property	Description
	 When set to **false**, the location filters are inactive. The default value is **true**.
sn_vaccine_sm.mass_booking_parallelism	Configure the number of parallel queues used to process mass booking. The enabled values are **1 to 8**. **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. The default value is **4**. For more information about enabling mass booking parallel processing, see Manage high number of concurrent bookings.
sn_vaccine_sm.search_assist_accessibility	Minimize the search assist section and view the search results even at 200% zoom. To expand the search assist section, click **Show search assist**. When set to **true**, clicking **Search** automatically minimizes the search assist section. When set to **false**, the system returns to its default behavior.
sn_vaccine_sm.enable_inventory_management	Enable scheduling based on available inventory for a program location center. The default value is **false**. For more information about enabling inventory management, see Configure inventory-based scheduling for a center.
sn_vaccine_sm.im_batch_distribution_day_count	Set the day count of days to distribute a supply lot. You can distribute the inventory evenly over a specified date range.

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Vaccine Administration Management system properties (continued)

Property	Description
	The default value is **7**.
sn_vaccine_sm.enable_multi_vaccine	Change the order of method selection while scheduling your vaccinations. 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. **Note:** The system property only applies if the *sn_vaccine_sm.enable_inventory_management* value is **true**. The default value is **false**.
sn_vaccine_sm.multi_vaccine_availability_check_days	Set the number of days to check for the availability in the method selection. **Note:** The system property only applies if the *sn_vaccine_sm.enable_multi_vaccine* value is **true**. The default value is **7**.
sn_vaccine_sm.allow_user_selection_of_vaccine_method	Enable or disable method selection. When set to **true**, users can choose the method while scheduling and rescheduling their appointments. When set to **false**, the system auto-selects the method based on the configuration of the *sn_vaccine_sm.enable_multi_vaccine* system property. The default value is **false**.
sn_vaccine_sm.covid.test.valid.days	Set the maximum duration in days that is used for infectious diseases, such as COVID-19 test report validity. The default value is **3**.
sn_vaccine_sm.vaccine.management.enable.authorization_on_self_report	Enable or disable the authorization record that is generated on COVID-19 vaccine self-report submission. The default value is **false**.
sn_vaccine_sm.vaccine.management.show_programs	Define the list of programs that require proof of vaccination.

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Vaccine Administration Management system properties (continued)

Property	Description
sn_vaccine_sm.vaccine.management.program_covid_sysid	Define the system ID of the infectious diseases, such as COVID-19 vaccination program.
sn_vaccine_sm.enable_cache	Enable or disable scoped cache for use with the application. When set to **true**, scoped cache is enabled. When set to **false**, data isn't cached and instead queried from the database directly. The default value is **true**.

Components installed with Vaccine Administration Management

Several types of components are installed with Vaccine Administration Management, including user roles and tables.

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. **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.	• sn_vaccine_sm.clinician • sn_vaccine_sm.manager • sn_apptmnt_booking.appointment_booking_manager

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Roles installed in Vaccine Administration Management (continued)

Role title [name]	Description	Contains roles
Clinician [sn_vaccine_sm.clinician]	Can create, read, and update vaccination requests, vaccination tasks, and vaccination questionnaires.	• 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.	• 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.	• 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
Vaccine Administration Management self-service portal user [sn_vaccine_sm.user]	Can request a vaccination and manage appointments.	sn_apptmnt_booking.appointment_booking_
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

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Roles installed in Vaccine Administration Management (continued)

Role title [name]	Description	Contains roles
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]	Stores 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's available to

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Vaccine Administration Management application tables (continued)

Table	Description
	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.
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.

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Vaccine Administration Management application tables (continued)

Table	Description
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 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.

Vaccine Administration Management data model

The Vaccine Administration Management application provides a data model that is used in the vaccine administration workflows.

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:

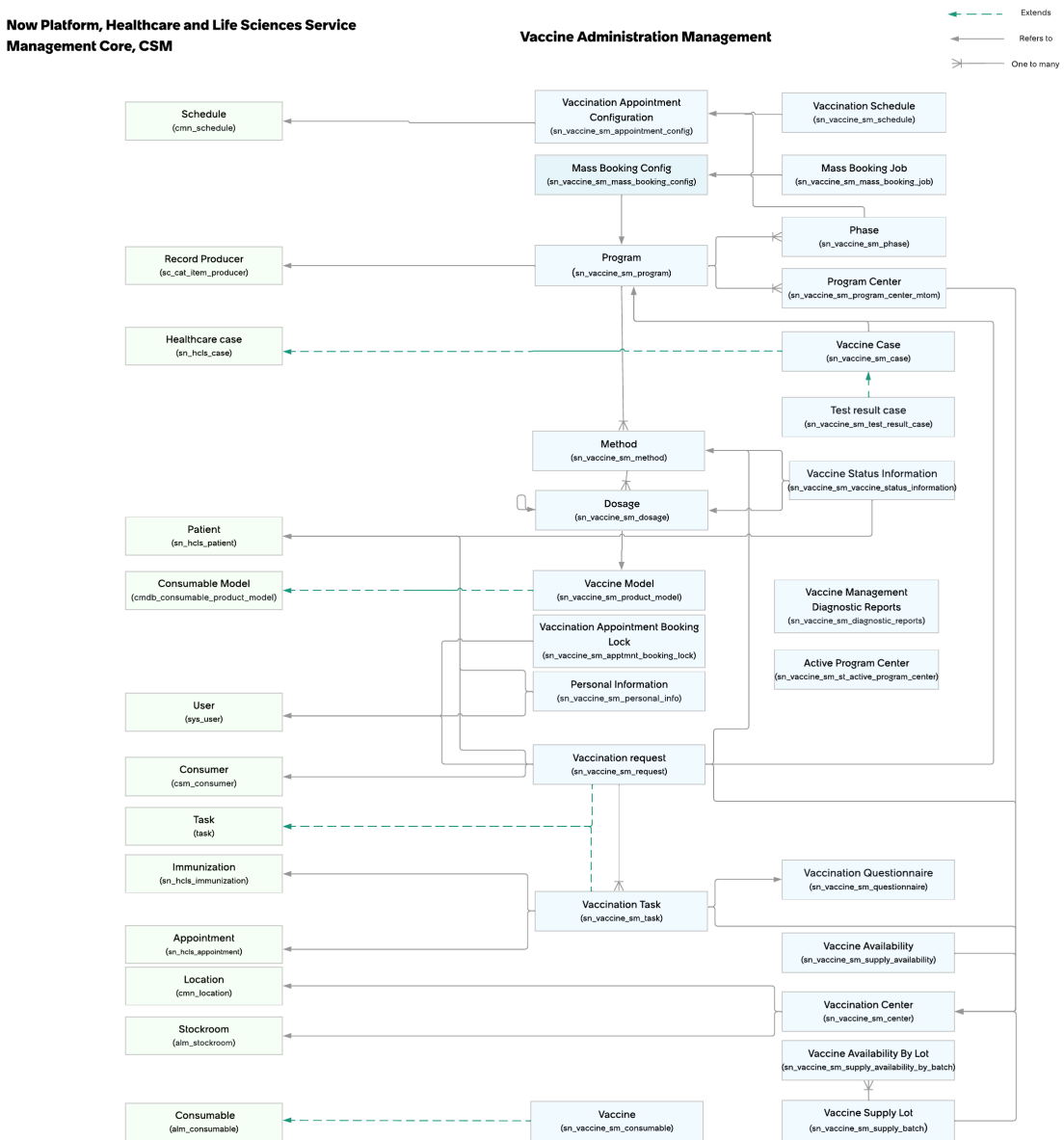
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- Tables that are included within the Vaccine Administration Management application.
- Tables that are included within the Healthcare and Life Sciences Service Management Core application.
- Tables that are from the Customer Service Management (CSM) application.
- Tables that are from the ServiceNow AI 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



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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]	Stores 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's 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.

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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 including the date vaccine is available from and allocated doses.

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Vaccine Administration Management application tables (continued)

Table	Description
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 ServiceNow AI Platform, Customer Service Management (CSM) applications to store data.

Healthcare and Life Sciences Service Management Core, ServiceNow AI 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.	ServiceNow AI Platform
Consumable model [cmdb_consumable_product_model]	Provides descriptions of consumable product models.	ServiceNow AI Platform

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Healthcare and Life Sciences Service Management Core, ServiceNow AI Platform, and CSM tables used in the Vaccine Administration Management data model (continued)

Table	Description	Application
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.	ServiceNow AI 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.	ServiceNow AI Platform
Schedule [sn_cmn_schedule]	Provides the holiday schedules in days and times to exclude from the appointment availability for a vaccine schedule.	ServiceNow AI Platform
Task [task]	Provides a series of standard task fields used on each of the tables that extend it.	ServiceNow AI Platform
User [sys_user]	Provides a series of standard user fields used on each of the tables that extend it.	ServiceNow AI Platform

To learn about Healthcare and Life Sciences Service Management Core, ServiceNow AI Platform, and CSM tables, see Healthcare and Life Sciences data model, Industry data model tables, and Tables installed with Customer Service Management.

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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.

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.

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.

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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

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.

Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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 Redox Inbound Integration.	Configure  Plan and configure your implementation.
Exchange data  Exchange real-time data between different healthcare systems.	Reference  Get details about supported data models and event types.

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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.

Important:

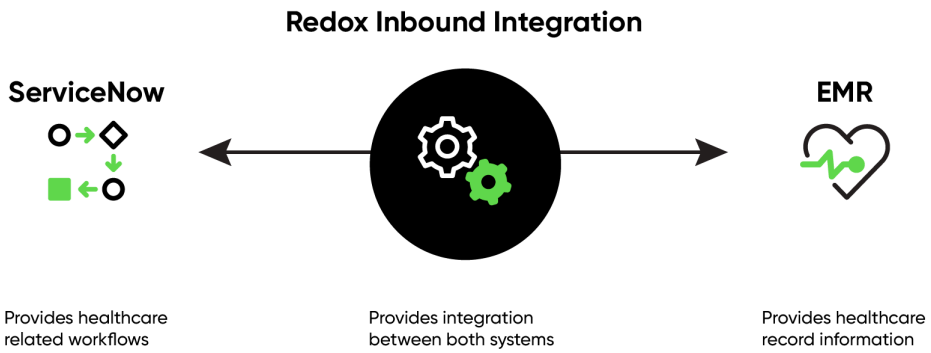
Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.



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	Exchange real-time healthcare data with Redox Inbound Integration	Administrator/Clinician

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Redox Inbound Integration benefits (continued)

Benefit	Key feature	Role
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.		

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.

Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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Before you begin

Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

- Confirm 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 Review Installation Details dialog box, any dependencies installed 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 are the sample records that describe application features for common use cases. Load the demo data when you first install the application on a development or test instance.
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.

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Before you begin

Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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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

Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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- 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.

Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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.

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Important:

Starting with the Yokohama release, Redox Inbound Integration is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported.

For details, see the Deprecation Process [KB0867184] article in the Now Support knowledge base.

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

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Redox data models and event types supported by the Redox Inbound Integration application (continued)

Data model	Event type
	Arrival
	Cancel
	Discharge
	PreAdmit
	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.

Clinical Device Management

ServiceNow® Clinical Device Management streamlines the management of medical devices.

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For information on maintenance and servicing, please see Field Service Management. For information on inventory and management, please see Enterprise Asset Management for Healthcare.

Healthcare Computerized Maintenance Management System

With the ServiceNow® Healthcare Computerized Maintenance Management System (Healthcare CMMS) application, manage medical device-related in-service process, alternative equipment maintenance (AEM) review process, medical device issues, and out-of-service process.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device 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 Healthcare CMMS.	Configure  Plan and configure your implementation.	Manage  Manage medical device cases from the Workspace.
Request for medical device services  Submit requests for medical device in-service, reviewing AEM requests, resolving medical device issues or medical device out-of-service .	Reference  Get details about components including tables.	

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Exploring Healthcare Computerized Maintenance Management System

Whether you're starting or expanding your implementation of the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application, consider learning more about the features available to manage medical devices.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

For the clinical engineers in your healthcare organization:

- Enhance compliance management by streamlining device workflows with patient risk parameters for maintenance plans.
- Provide visibility and data across all devices (connected or non-connected) and locations or sites in a single source of truth to exceed compliance requirements.
- Increase team productivity via inbuilt device data model, work order templates, mobile experience, and compliance reports.

For the clinicians in your healthcare organization:

- Improve clinician satisfaction and reduce device downtime by streamlined issue reporting and response workflows.
- Improve team productivity by managing devices across multiple hospitals, sites, or enterprises.

The Healthcare CMMS playbook provides a guided experience to review medical device-related cases. Using the playbooks, clinical engineers can set a medical device in-service, review alternative equipment maintenance (AEM) plans, and manage medical device out-of-service requests associated with a medical device model.

The Healthcare CMMS application uses the data model provided by the Healthcare and Life Sciences Service Management Core application. The medical device case is submitted as a medical device in-service case, medical device AEM case, medical device out-of-service case, or medical device issue case and assigned to clinical engineers who can then work on a device issue-related case or use a guided playbook within their Workspace for resolving a medical device in-service, AEM case, or medical device out-of-service.

Key features

- Manage the end-to-end process of medical device in-service.
- Review AEM requests for medical device models.
- Create and manage medical device issues for corrective maintenance of medical devices using a work order.
- Manage the end-to-end process of medical device out-of-service.
- Provide a guided experience for clinical engineers to complete setting medical devices in-service, review AEM requests, and setting medical devices out-of-service from Workspace by using the Healthcare CMMS playbooks.

To get started with the Healthcare CMMS application, see product/healthcare-life-sciences/concept/cmms-config-app.dita.

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Healthcare Computerized Maintenance Management System - medical devices in-service scenario

Use the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application for setting medical devices in-service and associating them with maintenance plans.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Scenario: A hospital purchases a new infusion pump that needs to be set to in-service and scheduled for planned maintenance. A device organization contributor, who acts as a requester with the sn_hcls_cmms.device_service_org_contributor role, works at the hospital location and submits the medical device in-service request form from the hospital's customer service portal. In the medical device in-service request form, the contributor enters the medical device model and medical device details such as model name, model number, manufacturer, short description, serial number, organization, and cost center. When the new medical device model is set to in-service, select **Allow alternate maintenance** in the medical device in-service request form in order to be able to enter a request for the AEM. After submitting the medical device in-service request form, a medical device in-service case is created in the ServiceNow instance associated with the customer service portal of the hospital. To resolve the case, the Healthcare CMMS workflow initiates a playbook configured for the medical device in-service cases. The case gets assigned to a clinical engineer who acts as a fulfiller with the sn_hcls_cmms.clinical_engineer role.

The following workflow steps elaborate how the clinical engineers with the sn_hcls_cmms.clinical_engineer role use the Healthcare CMMS application to enable the medical device in-service:

1. Uses the Workspace to view the medical device in-service case.
2. In Workspace, views the complete information about the medical device and its model from the **Details** tab.
3. Selects the **Playbook** tab to view all the necessary case-related information.

   The layout of a playbook enables clinical engineers to focus on the steps they are responsible for, while providing full visibility into the end-to-end process life cycle.
4. Reviews the medical device model.
5. Reviews the devices that are included in the case and assesses the risks for each medical device.
6. Reviews the work orders for the initial inspection of each medical device.
7. After the inspection of a medical device is completed, adds a maintenance plan for a new model/ medical device and reviews the maintenance plan.
8. Ensures that all medical device in-service tasks are set to complete in the playbook and closes the medical device in-service case.

Healthcare Computerized Maintenance Management System - Reviewing AEM request scenario

Use the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application for reviewing the existing maintenance plan related to a medical device model.

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Important:
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To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Scenario: A hospital needs to review the existing maintenance plan for all the MRI devices associated with a medical device model. A device organization contributor who works at the hospital location submits the request form for the alternative equipment maintenance (AEM) from the customer service portal of the hospital. The AEM request form shows the medical device models that have been selected to allow alternate maintenance in the form. In the AEM request form, the contributor enters the requester organization, medical device model, and other details, and suggests making changes to the maintenance plan schedule. When a medical device AEM case is created in the ServiceNow instance, the Healthcare CMMS workflow initiates a playbook configured for the medical device AEM cases. The case gets assigned to a clinical engineer who acts as a fulfiller with the sn_hcls_cmms.clinical_engineer role.

1. Uses the Workspace to view the medical device AEM case.
2. In Workspace, views the complete information about the medical device model and AEM request details from the **Details** tab.
3. Selects the **Playbook** tab to view all the necessary case-related information.

   The layout of a playbook enables clinical engineers to focus on the steps they're responsible for, while providing full visibility into the end-to-end process life cycle.
4. Reviews the AEM request details and submits the AEM request for approval.
5. After the changes to the AEM request are approved, removes the medical device model from the existing maintenance plan.
6. Adds a new plan with the updated maintenance schedule.
7. Ensures that all AEM request tasks are set to complete in the playbook and closes the medical device AEM case.

Healthcare Computerized Maintenance Management System - Medical devices out-of-service scenario

Use the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application for setting medical devices to out-of-service and creating disposal work orders for them.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Scenario: A hospital needs to discontinue or replace an old medical device with new model. Due to a fault leading it to be beyond repair, the medical device being replaced needs to be set to out-of-service. A device organization contributor who acts as requester with the sn_hcls_cmms.device_service_org_contributor role works at the hospital location submits the out-of-service request form from a customer service portal of the hospital. In the out-of-service request form, the contributor enters the medical device model and medical device details such as requested by, requested organization, device model, device, requester comments for out-

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of-service medical device, short description. After submitting the out-of-service request form, a medical device out-of-service case is created in the ServiceNow instance associated with the customer service portal of the hospital. To resolve the case, the Healthcare CMMS workflow initiates a playbook configured for the medical device out-of-service cases. The case gets assigned to a clinical engineer who acts as a fulfiller with the sn_hcls_cmms.clinical_engineer role.

Healthcare Computerized Maintenance Management System - Reporting medical device issue scenario

Use the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application for reporting medical device issues and performing corrective maintenance.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Scenario: An issue is identified with a medical device in a hospital and a corrective maintenance needs to be performed. A organization contributor for medical devices submits the medical device issue form from the customer service portal of the hospital. In the issue form, the contributor enters the requester organization, medical device, its model, and other issue details. When a medical device issue case is created in the ServiceNow instance, a clinical engineer who acts as a fulfiller with the sn_hcls_cmms.clinical_engineer role can work on the case.

1. Uses the Workspace to view the medical device issue case.
2. In Workspace, views the complete information about the medical device, its model, and issue details from the **Details** tab.
3. Creates a work order to resolve the issue.
4. When the work order is set to complete, closes the medical device issue case.

CMMS Dashboard

The CMMS Dashboard is a central place for CMMS users to monitor ongoing operations. The dashboard includes reports that query the database and display the results.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

To access the CMMS Dashboard, install the Performance Analytics Content Pack for Healthcare CDM application. For more information, see Components installed with Healthcare Computerized Maintenance Management System.

To display the CMMS Dashboard, navigate to **Platform Analytics Workspace** > **Dashboards** > **CMMS Dashboard**.

Dashboards are the home pages for products on the instance. The CMMS Dashboard provides metrics of all the medical devices. It also displays the status of all medical devices. The widgets can be filtered by selecting the duration.

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- **High risk PM% in the selected duration** shows the percentage of the planned work orders that were completed within the due date for high risk medical devices.
- **Non-high risk PM% in the selected duration** shows the percentage of the planned work orders that were completed within the due date for non-high risk medical devices.
- **Medical devices in-service in the selected duration** shows number of the medical devices in-service in the selected duration. Click the widget to view the list of all medical devices in-service. You can export the list of all medical devices in-service.
- **Closed work orders due in the selected duration** shows number of the closed work orders who's requested due date is in the selected duration. Click the widget to view the list of all closed work orders. You can export the list of all the closed work orders.
- **Open work orders due in the selected duration** shows number of the open work orders who's requested due date is in the selected duration. Click the widget to view the list of all open work orders. You can export the list of all the open work orders.
- **Status of all work orders due in the selected duration** shows the status of all work orders. Click the widget to view the list of all work orders. You can export the status list of all the work orders.

Configuring Healthcare Computerized Maintenance Management System

Set up the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application to complete activities associated with a medical device.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Note:
The Healthcare CMMS application is based on the Healthcare CMMS data model that extends the Healthcare and Life Sciences data model and stores all medical device cases in the Medical device case [sn_hcls_cmms_case] table.

The following table provides an overview of the configuration tasks required for Healthcare CMMS.

Healthcare CMMS configuration tasks

Task	Description
Install Healthcare CMMS.	Install the Healthcare CMMS application to work on medical devices.
Assign roles for Healthcare CMMS users.	Assign roles to control access to features, capabilities, and data in the Healthcare CMMS application.
Use the Healthcare CMMS data model.	Use Healthcare CMMS tables to store the data related to medical devices.

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Healthcare CMMS configuration tasks (continued)

Task	Description
Complete the configuration tasks for medical device in-service requests.	Configure Healthcare CMMS to set the medical devices in-service.
Complete the configuration tasks for the review of AEM requests.	Configure Healthcare CMMS for reviewing AEM requests for medical device models.
Configure the process for reporting medical device issues.	Configure Healthcare CMMS for reporting medical device issues from a service portal of your healthcare organization.
Configuring Healthcare CMMS to set medical devices out-of-service	Configure Healthcare CMMS to set the medical devices out-of-service.

Install Healthcare Computerized Maintenance Management System

You can install the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application (sn_hcls_cmms) 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

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

- Confirm 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 CMMS:

- Roles
- Tables
- Plugins
- ServiceNow Store applications
- Business rules

For more information, see Components installed with Healthcare Computerized Maintenance Management System.

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Healthcare Computerized Maintenance Management System application (sn_hcls_cmms) 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. Select **Install**.

Assign roles for Healthcare Computerized Maintenance Management System users

Assign roles to control access to features, capabilities, and data in the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application.

Before you begin

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Set the application scope to Healthcare Computerized Maintenance Management System using the application picker. For more information, see Application picker.

Role required: sn_hcls_cmms.clinical_engineering_admin or admin

About this task

Users with the roles listed in the following table can use the Healthcare CMMS application.

Role	Description	Contains r
sn_hcls_cmms.case_creator	Grants access to create medical device cases.	sn_hcls_c
sn_hcls_cmms.case_viewer	Grants access to view medical device cases.	None
sn_hcls_cmms.clinical_engineer	Creates and updates maintenance plans for medical device models and install base items for medical devices. Works on medical device cases.	• sn_cus • sn_hcls
sn_hcls_cmms.clinical_engineering_admin	Administers who can access the Healthcare CMMS application.	• sn_hcls • sn_risk • wm_ad

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Role	Description	Contains r
sn_hcls_cmms.clinical_engineering_technician	Works at medical device locations and records details in the work order form, including parts used and incidental expenses.	• sn_hcls • sn_hcls • sn_hcls • wm_ag
sn_hcls_cmms.device_service_org_contributor	Creates medical device cases for a organization as a clinician. **Note:** To create medical device cases for a organization (business location), a user with the sn_hcls_cmms.device_service_org_contributor role must be the member of the organization and assigned the **Location Contributor** responsibility type. The mapping of a organization and its members is included in the Organization Member [sn_csm_service_organization_member] table.	• sn_cus • sn_hcls • sn_hcls • sn_hcls
sn_hcls_cmms.sm_agent	Accesses and views all device data and medical device cases.	• model_ • sn_fsm • sn_hcls • sn_hcls • sn_hcls • sn_risk • sn_risk

Procedure

Assign roles to users and groups using the user administration feature in ServiceNow AI Platform.

- 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 Computerized Maintenance Management System data model

The Healthcare Computerized Maintenance Management System (Healthcare CMMS) application provides a data model for use in the Healthcare CMMS workflow.

Important:
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To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

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Important:
Starting with the Xanadu release, Healthcare Computerized Maintenance Management System is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

The Healthcare CMMS data model extends the Healthcare and Life Sciences data model.

The Healthcare CMMS data model uses the Medical device case [sn_hcls_cmms_case] table to store medical device cases for medical device in-service, reviewing the AEM request for a medical device model, resolving a medical device issue, or medical device out-of-service.

You can install the Healthcare CMMS application to use its data model.

The Healthcare CMMS data model uses the following tables included within the Healthcare CMMS application to store data.

Healthcare CMMS application tables

Table	Description
Medical device case [sn_hcls_cmms_case]	Stores the medical device cases.

The Healthcare CMMS 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
Healthcare case [sn_hcls_case]	Supports the healthcare case types.

For more information, see Healthcare and Life Sciences data model.

Configuring Healthcare CMMS to set medical devices in-service

You must perform the configurations tasks to enable clinical engineers to complete the medical devices in-service requests.

Important:
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To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

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Medical device in-service requests configuration tasks

Task	Description
Configure a playbook to set medical devices in-service.	Configure a playbook to provide step-by-step guidance to set the medical devices in-service.
Configure the risk assessment questionnaire to set medical devices in-service.	Configure the risk assessment questionnaire for all the medical devices in-service within a medical device model by using a risk assessment methodology.
Configure the process for creating medical devices included in medical device in-service requests.	Use scripted extension points to decide what medical devices are created after an medical device in-service request for a medical device is submitted.
Configure the process for submitting requests to set medical devices in-service	Configure the process for submitting requests to set the medical devices in-service from the service portal of your healthcare organization.

Configuring playbooks to set the medical devices in-service

You can configure a playbook to provide step-by-step guidance to set the medical devices in-service in the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

As a user with the admin role, you can create a playbook by using Playbooks, a ServiceNow AI Platform® feature. For more information, see Process Automation Designer.

The playbooks in the Healthcare CMMS application use the CSM Configurable Workspace playbook experience. By default, the Healthcare CMMS application includes the playbook for medical devices in-service to assist clinical engineers to resolve medical device in-service 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 the medical device cases. For more information, see Process definitions.

Note:
When configuring a process definition for the playbook associated with medical device in-service cases, ensure that the application scope is set to Healthcare Computerized Maintenance Management System using the application picker. For more information, see Application picker.

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Configuring the risk assessment questionnaire to set medical devices in-service

You can configure the risk assessment questionnaire to set all the medical devices in-service within a medical device model by using a risk assessment methodology.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

As a user with the admin role, you can configure a risk assessment methodology for assessing risks related to the patient safety identification and compliance risk management when setting a medical device in-service for your healthcare organization.

By default, the *Medical device risk assessment* methodology is available for assessing medical device risks. You can use the default risk assessment methodology to add a questionnaire for assessing device risks or create another risk assessment methodology. For more information, see Configure a risk assessment methodology.

Note the following points when configuring a risk assessment methodology for assessing medical device risks:

- The risk assess type must be **Residual risk**.
- The assessment context is configured for the Medical device install base item [sn_hcls_medical_device_install_base_item] table.
- The residual assessment is generated when you save a risk assessment methodology. You must then create and map the published manual factors or questionnaires to the generated residual assessment and publish the assessment and methodology.

  Note:
  The character limitations for manual factors are:

  - 100 chars for Manual factor (question)
  - 50 chars for Manual factor choice (answer)

- The residual risk rating is mapped to the **Risk score** column (field) of the Medical device install base item [sn_hcls_medical_device_install_base_item] table by default. Therefore, the risk score is displayed on the playbook to set medical devices in-service. You can modify the residual risk rating to another column (field) of the Medical device install base item [sn_hcls_medical_device_install_base_item] table.
- The UI action for risk assessment can be configured for the ServiceNow AI Platform view. For more information, see the Best practices to perform Any Object Assessment [KB0826429] article in the Now Support Knowledge Base.

Configure the process for creating medical devices included in in-service requests

Use scripted extension points to decide what medical devices are created after an in-service request for a medical device is submitted.

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Before you begin

Important:
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To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Set the application scope to Healthcare Computerized Maintenance Management System using the application picker. For more information, see Application picker.

Role required: admin

About this task

The Healthcare Computerized Maintenance Management System (Healthcare CMMS) application installs the `sn_hcls_cmms.CreateDevicesForOnboardCase` script, the `CreateDevicesForOnboardCase` script include, and the `CreateDevicesForOnboardCase` extension point.

The `sn_hcls_cmms.CreateDevicesForOnboardCase` script is preconfigured to set the medical devices in-service request form available by default within the application. Before creating a medical device in-service request case, the application runs the `sn_hcls_cmms.CreateDevicesForOnboardCase` script and uses the following submission workflow logic to create records and avoid duplication of records:

1. Create a medical device if the serial number of the device doesn't exist.
2. Create a medical device model if one doesn't exist or associate the medical device with an existing model as included in the medical device in-service request form.
3. Create work orders for the initial inspection of medical devices.
4. Set the state of the devices to **Installed** when the medical device in-service case is set to **Closed complete**.

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_cmms.CreateDevicesForOnboardCase**.
3. On the Extension Point form, select a script include to use the `CreateDevicesForOnboardCase` extension point by creating and registering a custom script include.

   You can refer to the *`CreateDevicesForOnboardCase`* script include provided with the application to create a custom script include to set the medical device in-service cases. For more information, see Registering custom script includes against the scripted extension points.

4. Customize the submission workflow logic of your medical device in-service request form by adding the `createDevices,checkForDuplicateDevices`,

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`checkForDuplicateDevicesForNewModel`, `associateToExistingModel`, `createModel`, `createInspectionWorkOrders`, `installDevices`, and `cancelDevices` methods to your script include that implements the `CreateDevicesForOnboardCase` 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.

Medical device in-service customizations

Customization	Implementation
Create a medical device only when the selected model contains a device with a unique serial number.	Include the `createDevices` method of the `CreateDevicesForOnboardCase` extension point in the implementation.
When selecting an existing medical device model, check whether the serial numbers of the medical devices included in the medical device in-service request exist.	Include the `checkForDuplicateDevices` method of the `CreateDevicesForOnboardCase` extension point in the implementation.
When adding a new medical device model, check whether the serial numbers of the medical devices included in the medical device in-service request exist.	Include the `checkForDuplicateDevicesForNewModel` method of the `CreateDevicesForOnboardCase` extension point in the implementation.
Check whether any existing medical device model of the same name, serial number, and manufacturer included in the medical device in-service request exists and associate the model of the medical device with the medical device in-service case.	Include the `associateToExistingModel` method of the `CreateDevicesForOnboardCase` extension point in the implementation.
Create a medical device model with the name, serial number, manufacturer, and description as included in the medical device in-service request and associate the medical device model with the medical device in-service case.	Include the `createModel` method of the `CreateDevicesForOnboardCase` extension point in the implementation.
Create work orders for the initial inspection of each medical device included in the medical device in-service case.	Include the `createInspectionWorkOrders` method of the `CreateDevicesForOnboardCase` extension point in the implementation.

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Customization	Implementation
Set the status of medical devices that are associated with the medical device in-service case to **Installed**.	Include the `installDevices` method of the `CreateDevicesForOnboardCase` extension point in the implementation.
Set the status of medical devices that are associated with the medical device in-service case to **Canceled**.	Include the `cancelDevices` method of the `CreateDevicesForOnboardCase` extension point in the implementation.

5. On the Extension Point form, click **Update**.

Configure the process for submitting medical device in-service requests for medical devices

You can configure the process for submitting requests for the medical devices in-service from the service portal of your healthcare organization.

Important:
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To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

By default, the users with the sn_hcls_cmms.device_service_org_contributor role can create medical device in-service cases from a Customer Service Portal page of a healthcare organization. The *`Medical device in-service`* option is available from the Case menu on the Customer Service Portal page to create medical device in-service cases.

As a user with the admin role, you can use the *`Medical device in-service`* record producer, which is available by default, or create your own record producer to enable creating medical device in-service cases from a service portal. You can include the record producer for creating medical device in-service cases in a service#catalog and display the service#catalog#as a module on the service portal page. You can then enable users with the sn_hcls_cmms.device_service_org_contributor role to use the module for creating medical device in-service cases.

To learn about record producers and service catalogs, see Record Producer and Set up a service catalog.

Configuring Healthcare CMMS for the review of AEM requests

You must perform the configurations tasks to enable clinical engineers to complete the review requests for alternative equipment maintenance (AEM) associated with medical devices.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

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Medical device AEM review requests configuration tasks

Task	Description
Configure a playbook for reviewing AEM requests of medical devices.	Configure a playbook to provide step-by-step guidance for resolving medical device cases for reviewing AEM request for a medical device model.
Configuring the process for submitting AEM requests.	Configure the process for submitting AEM requests from the service portal of your healthcare organization.
Configure the approval process of AEM for a medical device model.	Define the conditions for approval of changes to the current maintenance plan for a medical device model associated with a medical device AEM case.

Configuring playbooks for reviewing AEM requests for medical devices

Configure a playbook to provide step-by-step guidance for resolving medical device cases for reviewing alternative equipment maintenance (AEM) requests in the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

As a user with the admin role, you can create a playbook by using Playbooks, a ServiceNow AI Platform® feature. For more information, see Process Automation Designer.

The playbooks in the Healthcare CMMS application use the CSM Configurable Workspace playbook experience. By default, the Healthcare CMMS application includes the playbook for reviewing AEM requests for medical device models and its devices to assist clinical engineers to resolve medical device AEM 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 the medical device cases. For more information, see Process definitions.

Note:
When configuring a process definition for the playbook associated with medical device AEM cases, ensure that the application scope is set to Healthcare Computerized Maintenance Management System using the application picker. For more information, see Application picker.

Configuring the process for submitting AEM requests

You can configure the process for requesting the review of alternative equipment maintenance (AEM) for the medical device models from a service portal of your healthcare organization.

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Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

By default, the users with the sn_hcls_cmms.device_service_org_contributor role can create medical device AEM cases from a Customer Service Portal page of a healthcare organization. The *Request AEM review* option is available from the Case menu on the Customer Service Portal page to create medical device AEM cases.

As a user with the admin role, you can use the *Request AEM review* record producer, available by default, or create your own record producer to enable creating medical device AEM cases from a service portal. You can include the record producer for creating medical device AEM cases in a service#catalog and display the service#catalog#as a module on the service portal page. You can then enable users with the sn_hcls_cmms.device_service_org_contributor role to use the module for creating medical device AEM cases.

To learn about record producers and service catalogs, see Record Producer and Set up a service catalog.

Configuring the approval process of AEM requests

You can define the conditions for approval of changes to the current maintenance plan for a medical device model associated with a medical device AEM case.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

As a user with the admin role, you can configure decision tables to initiate the approval workflow for an alternative equipment maintenance (AEM) request when the decision condition is satisfied for a medical device AEM case. For example, as part of the maintenance plan scheduling process, you can define conditions to send the AEM request for approval to specific users for reviewing and approving the plan when the state of the medical device AEM is set to **Review in progress**.

You configure decision tables for medical device AEM cases by navigating to **All** > **System Definition** > **Decision Tables**. When configuring decision tables for medical device AEM cases, associate the column in the Medical device case [sn_hcls_cmms_case] table as a decision input. By default, the Medical device AEM approval decision table is available within the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application to configure the decision conditions for the approval of AEM requests.

The **Trigger medical device AEM approval** business rule runs when a clinical engineer selects **Request approval** during the review of an AEM request in the playbook. The business rule triggers the approval workflow, if available, for the AEM review. When the decision conditions are satisfied, the approval request is sent to all the approvers. If no approval workflow is available, the AEM request is automatically approved.

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Note:
When configuring the decision approval flow using the Workflow Studio feature, make sure that the **Approval** field configured for the Medical device case [sn_hcls_cmms_case] table is set to **Approval** for the last level of the approval action only. For more information, see Ask for Approval step.

To learn more, see Decision Tables.

Configuring Healthcare CMMS to set medical devices out-of-service

You must perform the configurations tasks to enable clinical engineers to complete the out-of-service requests for the medical devices.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Medical device out-of-service requests configuration tasks

Task	Description
Configuring playbooks to set medical devices out-of-service.	Configure a playbook to provide step-by-step guidance to setting medical devices out-of-service.
Configuring the process for submitting medical device out-of-service requests for medical devices.	Configure the process for submitting requests to set medical devices out-of-service from the service portal of your healthcare organization.

Configuring playbooks to set medical devices out-of-service

You can configure a playbook to provide step-by-step guidance to set medical devices out-of-service in the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

As a user with the admin role, you can create a playbook by using Playbooks, a ServiceNow AI Platform® feature. For more information, see Process Automation Designer.

The playbooks in the Healthcare CMMS application use the CSM Configurable Workspace playbook experience. By default, the Healthcare CMMS application includes the playbook for medical device out-of-service to assist clinical engineers to resolve medical device out-of-service 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

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for the playbook associated with the medical device cases. For more information, see Process definitions.

Note:
When configuring a process definition for the playbook associated with medical device out-of-service cases, ensure that the application scope is set to Healthcare Computerized Maintenance Management System using the application picker. For more information, see Application picker.

Configuring the process for submitting medical device out-of-service requests for medical devices

You can configure the process for submitting requests to set medical devices out-of-service from the service portal of your healthcare organization.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

By default, the users with the sn_hcls_cmms.device_service_org_contributor role can create medical device out-of-service cases from a Customer Service Portal page of a healthcare organization. The *Medical device out-of-service* option is available from the Case menu on the Customer Service Portal page to create medical device out-of-service cases.

As a user with the admin role, you can use the *Medical device out-of-service* record producer, which is available by default, or create your own record producer to enable creating medical device out-of-service cases from a service portal. You can include the record producer for creating medical device out-of-service cases in a service#catalog and display the service#catalog#as a module on the service portal page. You can then enable users with the sn_hcls_cmms.device_service_org_contributor role to use the module for creating medical device out-of-service cases.

To learn about record producers and service catalogs, see Record Producer and Set up a service catalog.

Configuring the process for reporting medical device issues

You can configure the process for reporting medical device issues from a service portal of your healthcare organization.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

By default, the users with the sn_hcls_cmms.device_service_org_contributor role can create medical device issue cases from a Customer Service Portal page of a healthcare organization. The *Report medical device issue* option is available from the Case menu on the Customer Service Portal page to create medical device issue cases.

As a user with the admin role or contributor, you can use the *Report medical device issue* record producer, which is available by default, or create your own record producer

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to enable creating medical device issue cases from a service portal. You can include the record producer for creating medical device issue cases in a service#catalog and display the service#catalog#as a module on the service portal page. You can then enable users with the sn_hcls_cmms.device_service_org_contributor role to use the module for creating medical device issue cases.

To learn about record producers and service catalogs, see Record Producer and Set up a service catalog.

Managing medical device cases in Workspace

You can use Workspace to manage medical device cases.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

As a clinical engineer, manage the following types of medical device cases from Workspace:

Medical device in-service case

When a request for medical device in-service is submitted from a service portal, a medical device in-service case is created. As a clinical engineer, you can use Workspace to view medical device in-service cases and complete the in-service request for a medical device.

Medical device AEM case

When a request for reviewing an alternative equipment maintenance (AEM) request for a medical device model is submitted from a service portal, a medical device AEM case is created. As a clinical engineer, you can use Workspace to view medical device AEM cases and complete the AEM review request for a medical device model.

Medical device issue case

When a medical device issue is reported from a service portal, a medical device issue case is created. As a clinical engineer, you can use Workspace to view medical device issue cases and perform corrective maintenance of medical devices to resolve medical device issues.

Medical device out-of-service case

When a request for setting a medical device to out-of-service is submitted from a service portal, a medical device out-of-service case is created. As a clinical engineer, you can use Workspace to view medical device out-of-service cases and complete the out-of-service request for a medical device.

Viewing the landing page for medical device cases in Workspace

As a clinical engineer, you can use the landing page of the Workspace to quickly scan and access medical device cases.

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Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

The landing page of the Workspace provides an overview of the medical device cases assigned to you and your groups.

Role required

Clinical engineers must have the sn_hcls_cmms.clinical_engineer role to use the Workspace. For more information, see product/healthcare-life-sciences/task/cmms-assign-roles.dita.

Accessing and using the landing page

To access the Healthcare CMMS, navigate to **All** > *Healthcare CMMS* > **Workspace**.

The Workspace landing page includes components that display medical device 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 clinical engineer, you can perform the following tasks from the landing page of the Workspace:

- 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

The Workspace landing page for medical device cases is same as the landing page of Workspace for any healthcare-related cases and displays healthcare case-related data including cases created for medical devices in-service, reviewing AEM requests for medical device models, addressing medical device issues, and medical devices out-of-service. For more information, see View the landing page for healthcare-related cases in Workspace.

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

Managing medical device in-service cases in Workspace

You can use Workspace to manage medical device in-service cases.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

When a request to set a medical device in-service is submitted from a service portal, a medical device in-service case is created for a clinical engineer to work on. As a clinical engineer with

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the sn_hcls_cmms.clinical_engineer role, you can review the medical device in-service request, create the medical device and medical device model, or associate the medical device with an existing model to complete the medical device in-service request.

Medical device in-service cases managing tasks

Task	Description
Access the Workspace.	Use the home page in Workspace to quickly scan and access medical device in-service cases.
View a medical device in-service case in Workspace.	View a medical device in-service case in Workspace to complete the activities for a medical device in-service.
Understand the life cycle of a medical device in-service case.	Understand the various states of a medical device in-service case.
Work on a medical device in-service case.	Use the playbook available with the Healthcare CMMS application to manage medical device in-service cases.
Assess the medical device risks.	Assess risks and complete your assessments when a medical device is set to in-service and submit the assessment to relevant approvers.

View a medical device in-service case in Workspace

View a medical device in-service case in Workspace to complete the process of medical devices in-service.

Before you begin

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

You must have access to medical device in-service cases.

Role required: sn_hcls_cmms.clinical_engineer

Procedure

1. Open your Workspace by navigating to **All** > *Healthcare CMMS* > **Workspace**.
2. View medical device in-service cases assigned to you or your groups.

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- View medical device in-service cases assigned to you by navigating to **Lists** > **Medical device in-service case** > **My cases**.
- View all open medical device in-service cases assigned to you by navigating to **Lists** > **Medical device in-service case** > **My open cases**.
- View medical device in-service cases that belong to your groups but have not been assigned to anyone by navigating to **Lists** > **Medical device in-service case** > **My groups unassigned cases**.
- View all medical device in-service cases by navigating to **Lists** > **Medical device in-service case** > **All**.

3. Click the link to the case you want to view.

Result

The selected medical device in-service case page opens in another tab within Workspace displaying the following components:

Playbook

The actionable activities used to complete the medical device in-service workflow.

Details

Details of the medical device in-service case.

Work Orders

Work orders for the initial inspection of medical devices.

Affected Install Base Items

Medical devices configured as install base items.

A medical device in-service case is a type of medical device case 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 medical device in-service case.

For more information on tabs available for a customer service case, see Customer service case form.

Life cycle of a medical device in-service case

Medical device in-service cases within the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application can be in one of the several states as it progresses through the fulfillment cycle.

Important:
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To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

The following diagram shows the different states of a medical device in-service case.

Medical device in-service case life cycle

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Medical device in-service case states

State	Description
New	Medical device in-service case is created but not yet assigned to anyone.
Open	Medical device in-service case is assigned.
Review in progress	Medical device in-service case is being reviewed by a clinical engineer.
Model setup	New medical device model is being created and a maintenance plan is being created for the model. **Note:** The **Model setup** state occurs when a new medical device model is requested for the medical device.
Device setup	Medical device is being added to the application, risks are being assessed for the medical device, and the work order for the initial inspection of the medical device is being completed.
Closed complete	Medical device in-service case was closed with the resolution code and notes, and the in-service process of the medical device was completed.
Closed incomplete	Medical device in-service case was marked as incomplete because the medical device was not in-service.
Canceled	Medical device in-service case was canceled because it was an invalid request.

Note:
You can't edit a medical device in-service case when the state of the case is set to **Closed complete**, **Closed incomplete**, or **Canceled**.

Working on a medical device in-service case in Workspace

Use the playbook available with the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application to manage medical device in-service cases and complete requests to set the medical devices in-service.

Important:
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To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

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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 Healthcare CMMS, the **Playbook** tab appears for a medical device in-service case. For more information on how to interact with a playbook, see Interact with Playbook.

As a clinical engineer with the sn_hcls_cmms.clinical_engineer role, you can use the Healthcare CMMS playbook to complete all medical device in-service activities for a medical device. You can access the **Playbook** tab on your Workspace when a medical device in-service case is assigned to you. The Healthcare CMMS 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 clinical engineer with the sn_hcls_cmms.clinical_engineer role on the **Playbook** tab of the Workspace.

Healthcare CMMS playbook stages for medical device in-service cases

Stage	Description
Medical device model intake	Review the medical device model associated with the medical device.
Maintenance plan intake	Capture or review the benefits investigation preference opted by the patient and manage the pre-authorization activities.
Medical device intake	Review the medical devices to be in-service and the work orders created for the initial inspection of those devices.
Maintenance plans	Review the maintenance plans selected for the medical devices to be in-service.
Review and confirm	Close the medical device in-service request.

Note:
The state of the medical device in-service case progresses as you complete a stage in the playbook. For more information, see Life cycle of a medical device in-service case.

Reviewing the medical device model

In the **Medical device model intake** stage of the playbook, complete the **Review model** activity by reviewing the name, number, and manufacturer details including the short description entered for a medical device model included within an medical device in-service request and modify the details, if needed.

Note:
If there's no new model required for the medical device, the **Medical device model intake** stage doesn't appear in the playbook.

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Managing maintenance plans

In the **Maintenance plan intake** stage of the playbook, complete the **Manage maintenance plans** activity by managing maintenance plans and schedules for the medical device. You can create a new maintenance plan by clicking **Add plan** and creating a work plan from the Work Plan page.

In the new Work Plan page, the required conditions and set conditions are automatically populated.

Note:
If there's no new model required for the medical device, the **Maintenance plan intake** stage doesn't appear in the playbook.

Completing the medical device intake activities

In the **Medical device intake** stage of the playbook, complete the following activities:

1. **Review devices**: Review the medical devices included within a medical device model and edit their details, if needed. You also evaluate the risks for a medical device. When the risk assessment is completed, the risk score is displayed for the device. For more information, see Assess the risks when setting a medical device in-service.

   After the medical device is reviewed, a work order for the initial inspection for each device included in the model is created automatically.

2. **Review work orders**: Mark this step as complete when a technician completes the work order associated with the device. You can also view all work orders associated with the medical device model or create another work order by clicking **View all**.

Reviewing maintenance plans

In the **Maintenance plans** stage of the playbook, review the schedule of the maintenance plan for the device that is automatically populated from the medical device model.

Closing the medical device in-service request

In the **Review and confirm** stage of the playbook, complete the **Close case** activity by waiting until all other activities are completed, and then selecting a resolution code and adding any resolution notes.

Note:
After the state of the medical device in-service case is set to **Closed complete**, the state of the medical device is automatically set to **Installed**.

Assess the risks when setting a medical device in-service

Assess the risks related to the patient safety identification and compliance risk management when setting a medical device in-service and submit the assessment to relevant approvers.

Before you begin

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

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- Your administrator must have configured a risk assessment methodology to set a medical device in-service within a medical device model.
- You must have access to medical device in-service cases.

Role required: sn_hcls_cmms.clinical_engineer or sn_hcls_cmms.sm_agent

About this task

You can also perform risk assessment in the Risk Workspace. For more information, see Perform advanced risk assessment in the Risk Workspace.

Note:
The risk assessment methodology to set a medical device in-service is the residual risk assessment type.

Procedure

1. Open your Workspace by navigating to **All** > *Healthcare CMMS* > **Workspace**.
2. View medical device in-service cases assigned to you by navigating to **Lists** > **Medical device in-service case** > **My cases**.
3. Click the link to the case associated with the medical device for which you want to assess risks.
4. On the Record details pane in the Contextual side panel, click **Assess risk**.
5. On the dialog box that is displayed, click the link to the risk assessment.
6. On the HCLS risk assessment tab, click **Start assessment**.
7. On the Risk assessment tab, complete the risk questionnaire to set the medical device in-service.
8. Click **Review and submit**.
9. To finish your assessment and send it for approval, click **Save**, and then click **Request Approval**.
10. In the Add comments dialog box, enter your comments in the text box, and then click **Submit**.

Managing medical device AEM cases in Workspace

You can use Workspace to manage medical device AEM cases.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

When an AEM request for reviewing the current maintenance plan for a medical device model is submitted from a service portal, a medical device AEM case is created for a clinical engineer to work on. As a clinical engineer with the sn_hcls_cmms.clinical_engineer role, you can review the AEM request, remove any current maintenance plan, and change the schedule of the maintenance plan to complete the AEM request.

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Medical device AEM cases managing tasks

Task	Description
Access the Workspace.	Use the home page in Workspace to quickly scan and access medical device AEM cases.
View a medical device AEM case in Workspace.	View a medical device AEM case in Workspace to complete review of an AEM request associated with a medical device model.
Understand the life cycle of a medical device AEM case.	Understand the various states of a medical device AEM case.
Work on a medical device in-service case.	Use the playbook available with the Healthcare CMMS application to manage medical device AEM cases.

View a medical device AEM case in Workspace

View a medical device AEM case in Workspace to complete the review of an alternative equipment maintenance (AEM) request for a medical device model.

Before you begin

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

You must have access to medical device AEM cases.

Role required: sn_hcls_cmms.clinical_engineer

Procedure

1. Open your Workspace by navigating to **All** > *Healthcare CMMS* > **Workspace**.
2. View medical device AEM cases assigned to you or your groups.
   - View medical device AEM cases assigned to you by navigating to **Lists** > **Medical device AEM case** > **My cases**.
   - View all open medical device AEM cases assigned to you by navigating to **Lists** > **Medical device AEM case** > **My open cases**.
   - View medical device AEM cases that belong to your groups but have not been assigned to anyone by navigating to **Lists** > **Medical device AEM case** > **My groups unassigned cases**.
   - View all medical device AEM cases by navigating to **Lists** > **Medical device AEM case** > **All**.
3. Click the link to the case you want to view.

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Result
The selected medical device AEM case page opens in another tab within Workspace displaying the following components:

Playbook

The actionable activities used to complete the AEM recommendations.

Details

Details of the medical device AEM case.

Approvers

Approvers of the AEM requests.

A medical device AEM case is a type of medical device case 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 medical device AEM case.

For more information on tabs available for a customer service case, see Customer service case form.

Life cycle of a medical device AEM case

Medical device AEM cases within the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application can be in one of the several states as it progresses through the fulfillment cycle.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Medical device AEM case states

State	Description
New	Medical device AEM case is created but not yet assigned to anyone.
Open	Medical device AEM case is assigned.
Review in progress	Medical device AEM case is being reviewed by a clinical engineer.
Model setup	New maintenance plan is being created for the model based on the AEM request.
Closed complete	Medical device AEM case was closed with the resolution code and notes, and the review process of the AEM request was completed.

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Medical device AEM case states (continued)

State	Description
Closed incomplete	Medical device AEM case was marked as incomplete because the AEM request was not approved.
Canceled	Medical device AEM case was canceled because the AEM request was invalid.

Note:
You can't edit a medical device AEM case when the state of the case is set to **Closed complete**, **Closed incomplete**, or **Canceled**.

Working on a medical device AEM case in Workspace

Use the playbook available with the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application to manage medical device AEM cases and complete the review of an alternative equipment maintenance (AEM) request for a medical device model.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

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 Healthcare CMMS, the **Playbook** tab appears for a medical device AEM case. For more information on how to interact with a playbook, see Interact with Playbook.

As a clinical engineer with the sn_hcls_cmms.clinical_engineer role, you can use the Healthcare CMMS playbook to complete all activities for reviewing an AEM request for a medical device model. You can access the **Playbook** tab on your Workspace when a medical device AEM case is assigned to you. The Healthcare CMMS 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 clinical engineer with the sn_hcls_cmms.clinical_engineer role on the **Playbook** tab of the Workspace.

Healthcare CMMS playbook stages for medical device AEM cases

Stage	Description
Intake	Review the medical device AEM case details, make changes to the existing maintenance plan, and submit the AEM request for approval.
Manage AEM plan	Remove the medical device model from the current maintenance plan.

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Healthcare CMMS playbook stages for medical device AEM cases (continued)

Stage	Description
Review and confirm	Close the review request.

Note:
The state of the medical device AEM case progresses as you complete a stage in the playbook. For more information, see Life cycle of a medical device in-service case.

Completing the initial review activities

In the **Intake** stage of the playbook, complete the following activities:

1. **Review AEM request**: Review the details entered for an AEM request for a medical device model and update the details, if needed.
2. **Submit AEM request for approval**: Review any additional information required for the medical device model and submit the AEM request for approvals. If an approval workflow for AEM request is configured by your administrator, the AEM request is submitted for approvals.

Managing AEM requests

In the **Manage AEM plan** stage of the playbook, complete the **Remove from maintenance plans** activity by removing the medical device model from the current maintenance plan, if available.

You can create a new maintenance plan by clicking **Add plan** and creating a work plan from the Work Plan page.

In the new Work Plan page, the required conditions and set conditions are automatically populated.

Closing the AEM request

In the **Review and confirm** stage of the playbook, complete the **Close case** activity by waiting until all other activities are completed, and then selecting a resolution code and adding any resolution notes.

Managing medical device issue cases in Workspace

You can use Workspace to manage medical device issue cases.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

When a medical device issue is reported from a service portal, a medical device issue case is created on the associated ServiceNow instance.

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As a clinical engineer with the sn_hcls_cmms.clinical_engineer role, you can manage the corrective maintenance of medical devices by resolving the medical device issue cases. To learn more, see Work on a medical device issue case.

Work on a medical device issue case

Work on the medical device issue case for the corrective maintenance of medical devices.

Before you begin

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Role required: sn_hcls_cmms.clinical_engineer

Procedure

1. Use the home page in Workspace to quickly scan and access medical device issue cases.
2. View a medical device issue case in Workspace.
3. **Optional:** Create a work order to specify the nature of the work required to resolve the medical device issue.
4. Close the medical device issue case.

View a medical device issue case in Workspace

View a medical device issue case in Workspace to resolve the issues reported for medical devices.

Before you begin

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

You must have access to medical device issue cases.

Role required: sn_hcls_cmms.clinical_engineer

Procedure

1. Open your Workspace by navigating to **All** > *Healthcare CMMS* > **Workspace**.
2. View medical device issue cases assigned to you or your groups.
   - View medical device issue cases assigned to you by navigating to **Lists** > **Medical device issue case** > **My cases**.
   - View all open medical device issue cases assigned to you by navigating to **Lists** > **Medical device issue case** > **My open cases**.

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- View medical device issue cases that belong to your groups but have not been assigned to anyone by navigating to **Lists** > **Medical device issue case** > **My groups unassigned cases**.
- View all medical device issue cases by navigating to **Lists** > **Medical device issue case** > **All**.

3. Click the link to the case you want to view.

Result

The selected medical device issue case page opens in another tab within Workspace displaying the following components:

Details

Details of the medical device AEM case.

Work Orders

Work orders for clinical engineer technicians to perform the necessary actions and resolve the issues with medical devices.

Affected Install Base Items

Medical devices configured as install base items.

A medical device issue case is a type of medical device case 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 medical device issue case.

For more information on tabs available for a customer service case, see Customer service case form.

Life cycle of a medical device issue case

Medical device issue cases within the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application can be in one of the several states as it progresses through the fulfillment cycle.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

The following diagram shows the different states of a medical device issue case.

Medical device issue case states

State	Description
New	Medical device issue case is created but not yet assigned to anyone.
Open	Medical device issue case is assigned.
Closed complete	Medical device issue case was closed with the resolution code and notes, and the issue with the medical device as resolved.

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Medical device issue case states (continued)

State	Description
Closed incomplete	Medical device issue case was marked as incomplete because the issue was not resolved.
Canceled	Medical device issue case was canceled because it was an invalid request.

Note:
You can't edit a medical device issue case when the state of the case is set to **Closed complete**, **Closed incomplete**, or **Canceled**.

Create a work order for a medical device issue case

Create a work order to specify the nature of the work required to resolve a medical device issue case.

Before you begin

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Role required: sn_hcls_cmms.clinical_engineer

Procedure

1. Open your Workspace by navigating to **All** > *Healthcare CMMS* > **Workspace**.
2. Go to **Lists** > **Medical device issue case** > **All**.
3. Click the link to the case for which you want to a create work order.
4. On the Details tab, click **Create Work Order**.
5. On the Work Order tab, describe the work requested in the **Short description** and **Description** fields.
6. Fill in the other details such as location where work is required, template for creating the work order, and skills required to complete the work order.
7. In the **Requested due by** field of the Scheduling section, click the and select enter a date and time by when the work order must be completed.
8. Click **Ready For Qualification**.

Result

A work order task is automatically created. The short description, description, and location of the work order are copied into the task.

What to do next

A user with the sn_hcls_cmms.clinical_engineering_technician role can then complete the work order task. For more information, see Manage work orders.

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After the work order task is completed, you can close the case. For more information, see Close a medical device issue case.

Close a medical device issue case

Enter the resolution details of the medical device issue case and close a medical device issue case.

Before you begin

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Role required: sn_hcls_cmms.clinical_engineer

About this task

You can close a case, when the associated work order is completed and the medical device issue is resolved.

Procedure

1. Open your Workspace by navigating to **All** > *Healthcare CMMS* > **Workspace**.
2. Go to **Lists** > **Medical device issue case** > **All**.
3. Click the link to the case that you want to close.
4. In the Closure Information section of the Details tab, indicate the resolution state of the case by selecting a resolution code in the **Resolution Code** list.
5. Enter any information related to the closure in the **Resolution notes** field.
6. Click **Close case**.

Managing medical device out-of-service cases in Workspace

You can use Workspace to manage medical device out-of-service cases.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

When a request for setting a medical device to out-of-service is submitted from a service portal, a medical device out-of-service case is created for a clinical engineer to work on. As a clinical engineer with the sn_hcls_cmms.clinical_engineer role, you can manage the setting of a medical device to out-of-service. To learn more, see Healthcare Computerized Maintenance Management System - Medical devices out-of-service scenario.

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Medical device out-of-service cases managing tasks

Task	Description
Access the Workspace.	Use the home page in Workspace to quickly scan and access medical device out-of-service cases.
View a medical device out-of-service case in Workspace.	View a medical device out-of-service case in Workspace to complete out-of-service activities for a medical device.
Understand the life cycle of a medical device out-of-service case.	Understand the various states of a medical device out-of-service case.
Work on a medical device out-of-service case.	Use the playbook available with the Healthcare CMMS application to manage medical device out-of-service cases.

View a medical device out-of-service case in Workspace

View a medical device out-of-service case in Workspace to complete the process of setting medical devices to out-of-service.

Before you begin

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

You must have access to medical device out-of-service cases.

Role required: sn_hcls_cmms.clinical_engineer

Procedure

1. Open your Workspace by navigating to **All** > *Healthcare CMMS* > **Workspace**.
2. View medical device out-of-service cases assigned to you or your groups.
   - View medical device out-of-service cases assigned to you by navigating to **Lists** > **Medical device out-of-service case** > **My cases**.
   - View all open medical device out-of-service cases assigned to you by navigating to **Lists** > **Medical device out-of-service case** > **My open cases**.

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- View medical device out-of-service cases that belong to your groups but have not been assigned to anyone by navigating to **Lists** > **Medical device out-of-service case** > **My groups unassigned cases**.
- View all medical device out-of-service cases by navigating to **Lists** > **Medical device out-of-service case** > **All**.

3. Click the link to the case you want to view.

Result

The selected medical device out-of-service case page opens in another tab within Workspace displaying the following components:

Playbook

The actionable activities used to complete the medical device out-of-service workflow.

Details

Details of the medical device out-of-service case.

Work Orders

Work orders for the initial inspection of medical devices.

Affected Install Base Items

Medical devices configured as install base items.

A medical device out-of-service case is a type of medical device case 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 medical device out-of-service case.

For more information on tabs available for a customer service case, see Customer service case form.

Life cycle of a medical device out-of-service case

Medical device out-of-service cases within the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application can be in one of the several states as it progresses through the fulfillment cycle.

Important:
Starting with the Xanadu release, Healthcare Computerized Maintenance Management System is being prepared for future deprecation. It will be hidden and no longer activated on new instances but will continue to be supported. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

The following diagram shows the different states of a medical device out-of-service case.

Medical device out of service case states

State	Description
New	Medical device out-of-service case is created but not yet assigned to anyone.

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Medical device out of service case states (continued)

State	Description
Open	Medical device out-of-service case is assigned.
Review in progress	Medical device out-of-service case is being reviewed by a clinical engineer.
Medical device out-of-service	Cancel all work orders for the medical device and sets the medical device to out-of-service.
Closed complete	Medical device out-of-service case was closed with the resolution code and notes, and the out-of-service process of the medical device was completed.
Closed incomplete	Medical device out-of-service case was marked as incomplete because the medical device was not set to out-of-service.
Canceled	Medical device out-of-service case was canceled because it was an invalid request.

Working on a medical device out-of-service case in Workspace

Use the playbook available with the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application to manage medical device out-of-service cases and complete requests for setting the medical devices to out-of-service.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

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 Healthcare CMMS, the **Playbook** tab appears for a medical device out-of-service case. For more information on how to interact with a playbook, see Interact with Playbook.

As a clinical engineer with the sn_hcls_cmms.clinical_engineer role, you can use the Healthcare CMMS playbook to complete all out-of-service activities for a medical device. You can access the **Playbook** tab on your Workspace when a medical device out-of-service case is assigned to you. The Healthcare CMMS 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 clinical engineer with the sn_hcls_cmms.clinical_engineer role on the **Playbook** tab of the Workspace.

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Note:
The state of the medical device out-of-service case progresses as you complete a stage in the playbook. For more information, see Life cycle of a medical device out-of-service case.

Completing the initial review activities

In the **Medical device out-of-service** stage of the playbook, complete the following activities:

1. **Review medical device details**: Review the medical device details for a medical device model and update the details, if needed.

   After the medical device is reviewed and approved, a work order for the initial inspection for each device included in the model is created automatically.

2. **Cancel work orders**: Review and cancel the work orders for each medical devices.
3. **Set medical device out-of-service**: Set the medical device to out-of-service.
4. **Disposal work order**: Create a disposal work order for the out-of-service device.

Closing the out-of-service request

In the **Review and confirm** stage of the playbook, complete the **Close case** activity by waiting until all other activities are completed, and then selecting a resolution code and adding any resolution notes.

Creating requests for medical devices

Create requests for setting medical devices in-services, reviewing alternative equipment maintenance (AEM), resolving medical device issues, or setting medical devices out-of-service from a service portal.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Your administrator can configure the option for creating medical device cases based on the service request type for a medical device. The submission form for each request type is configured by your administrator.

As a user with the sn_hcls_cmms.device_service_org_contributor role, use the following options available by default from the Case menu on the Customer Service Portal page to place service requests for your medical devices:

Medical device in-service

Request to set a medical device in-service and associate the device with a maintenance plan.

Request AEM review

Request to review the current maintenance plan changes associated with a medical device model.

Report medical device issue

Report medical device issues and request to perform corrective maintenance for resolving them.

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Medical device out-of-service

Request to set a medical device out-of-service.

After a request is submitted, a corresponding medical device case is created on the associated ServiceNow instance. A clinical engineer then works on the case. To learn more, see Managing medical device cases in Workspace.

Healthcare Computerized Maintenance Management System reference

Reference topics provide additional information about Healthcare Computerized Maintenance Management System (Healthcare CMMS) components.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Components installed with Healthcare Computerized Maintenance Management System

Several types of components are installed with installation of the Healthcare Computerized Maintenance Management System (Healthcare CMMS) application, including tables, user roles, plugins, ServiceNow Store applications, and business rules.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Demo data is available for this feature.

Roles installed

Roles installed in Healthcare CMMS

Role	Description	Contains r
sn_hcls_cmms.case_creator	Grants access to create medical device cases.	sn_hcls_c
sn_hcls_cmms.case_viewer	Grants access to view medical device cases.	None
sn_hcls_cmms.clinical_engineer	Creates and updates maintenance plans for medical device models and install base items for medical devices. Works on medical device cases.	• sn_cus • sn_hcls
sn_hcls_cmms.clinical_engineering_admin	Administers who can access the Healthcare CMMS application.	• sn_hcls • sn_risk • wm_ad

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Roles installed in Healthcare CMMS (continued)

Role	Description	Contains r
sn_hcls_cmms.clinical_engineering_technician	Works at medical device locations and records details in the work order form, including parts used and incidental expenses.	• sn_hcls • sn_hcls • sn_hcls • wm_ag
sn_hcls_cmms.device_service_org_contributor	Creates medical device cases for a organization as a clinician. **Note:** To create medical device cases for a organization (business location), a user with the sn_hcls_cmms.device_service_org_contributor role must be the member of the organization and assigned the **Location Contributor** responsibility type. The mapping of a organization and its members is included in the Organization Member [sn_csm_service_organization_member] table.	• sn_cus • sn_hcls • sn_hcls • sn_hcls
sn_hcls_cmms.sm_agent	Accesses and views all device data and medical device cases.	• model_ • sn_fsm • sn_hcls • sn_hcls • sn_hcls • sn_risk • sn_risk

Tables installed

Tables installed in Healthcare CMMS application

Table	Description
Medical device case [sn_hcls_cmms_case]	Stores the medical device cases.

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Plugins installed

Plugins installed in Healthcare CMMS

Plugin	Description
Customer Service with Field Service Management (com.snc.csm_fsm_integration)	Enables the integration between the Healthcare CMMS and Field Service Management applications and makes available account, contact, partner, partner contact, and consumer information from Customer Service in Field Service Management.

ServiceNow Store applications installed

ServiceNow Store applications installed in Healthcare CMMS

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.
GRC: Advanced Risk (com.sn_risk_advanced)	Enables decision makers to avoid any negative impact on business operations by identifying, assessing, responding to, and continuously monitoring risks.
GRC: Common Workspace Elements (sn_grc_workspace)	Enables the use of the Advanced Risk feature in the CSM Configurable Workspace.
Performance Analytics Content Pack for Healthcare CDM (sn_hcls)	Install the Performance Analytics Content Pack for Healthcare CDM separately from ServiceNow Store. Provides Performance Analytics capabilities and dashboard for healthcare clinical device management applications. The dashboard provides visibility to the clinical engineering team to refer to all the metrics of the CMMS application.

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Business rules installed

Business rules installed in Healthcare CMMS

Business rule	Table	Rule criteria	Description
Create inspect WOs	Medical device case [sn_hcls_cmms_case]	Async update	Creates work orders for the initial inspection of a medical device when the state of the associated medical device in-service case is set to **Device setup**.
Mark devices as installed	Medical device case [sn_hcls_cmms_case]	Async update	Sets the install state of a medical device to **Installed** or **Canceled** when the state of the associated medical device in-service case is set to **Closed complete** or **Canceled**, respectively.
Setup medical device model	Medical device case [sn_hcls_cmms_case]	Before update	Creates a medical device model when none exists for a medical device and the state of the associated medical device in-service case is set to **Model setup**.
Trigger medical device AEM approval	Medical device case [sn_hcls_cmms_case]	Async update	Triggers the approval workflow, if available, for an alternative equipment maintenance (AEM) request.

Domain separation and Healthcare Computerized Maintenance Management System

Domain separation is supported for Healthcare Computerized Maintenance Management System (Healthcare CMMS). 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.

Important:
Healthcare Computerized Maintenance Management System is now deprecated and no longer supported or available for new activation. For details on the deprecation process, see the Deprecation Process [KB0867184] article in the Now Support Knowledge Base.

To use maintenance and servicing workflows or inventory and management workflows, please see Clinical Device Management.

Support level: Basic

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- 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.

The Healthcare CMMS application includes domain separation for transactional data like medical device cases including AEM, in-service, device issue cases, and out-of-service devices.

How domain separation works in Healthcare CMMS

For customers using the Healthcare CMMS application to raise medical device requests, the domain is set from the logged-in user's session, in the case created, and within 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.

Healthcare Operations

Streamline and optimize your care team operational tasks with the ServiceNow® Healthcare Operations applications.

Healthcare Operations includes the following applications:

Healthcare Operations Core

Provides the foundation to enable hospitals to streamline and automate their operations.

Care Team Operations for Healthcare IT

Contains the case types to report and fulfill healthcare IT issues.

Care Team Operations for Biomed

Contains the case types to report and fulfill biomed issues.

Care Team Operations for Environmental Services

Contains the case types to report and fulfill environmental services issues.

Care Team Operations for Facilities

Contains the case types to report and fulfill facilities issues.

Healthcare Operations Core

Healthcare Operations Core provides the foundation to enable hospitals to streamline and automate their operations.

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Get started

Explore  Learn more about the benefits of Healthcare Operations Core and how it's used.	Configure  Install Healthcare Operations Core and configure your environment.	Portal  Create operational support requests and gain visibility across your teams.
	Reference  Get details about Healthcare Operations Core components such as fields, tables, and properties.	

Troubleshoot and get help

- Ask questions and explore other resources for in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Healthcare Operations Core

Learn how you can use the Healthcare Operations Core application to enable your care team to work together efficiently and effectively to deliver patient-centered care.

Healthcare Operations Core overview

Healthcare Operations Core is designed to streamline and optimize operational processes to ensure efficient and coordinated delivery of a care team's operational needs.

The application gives clinicians time back to care for patients by providing them a means to report and track issues related to their day-to-day operations. This framework helps hospitals eliminate inefficient manual processes, reduce patient safety risks, and improve the clinician and patient experience through timely resolution of issues and completion of important tasks.

By integrating with supporting service departments such as IT and Biomed, Healthcare Operations Core ensures that all care team tasks are well-coordinated and supported.

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The following applications are available for use with Healthcare Operations Core:

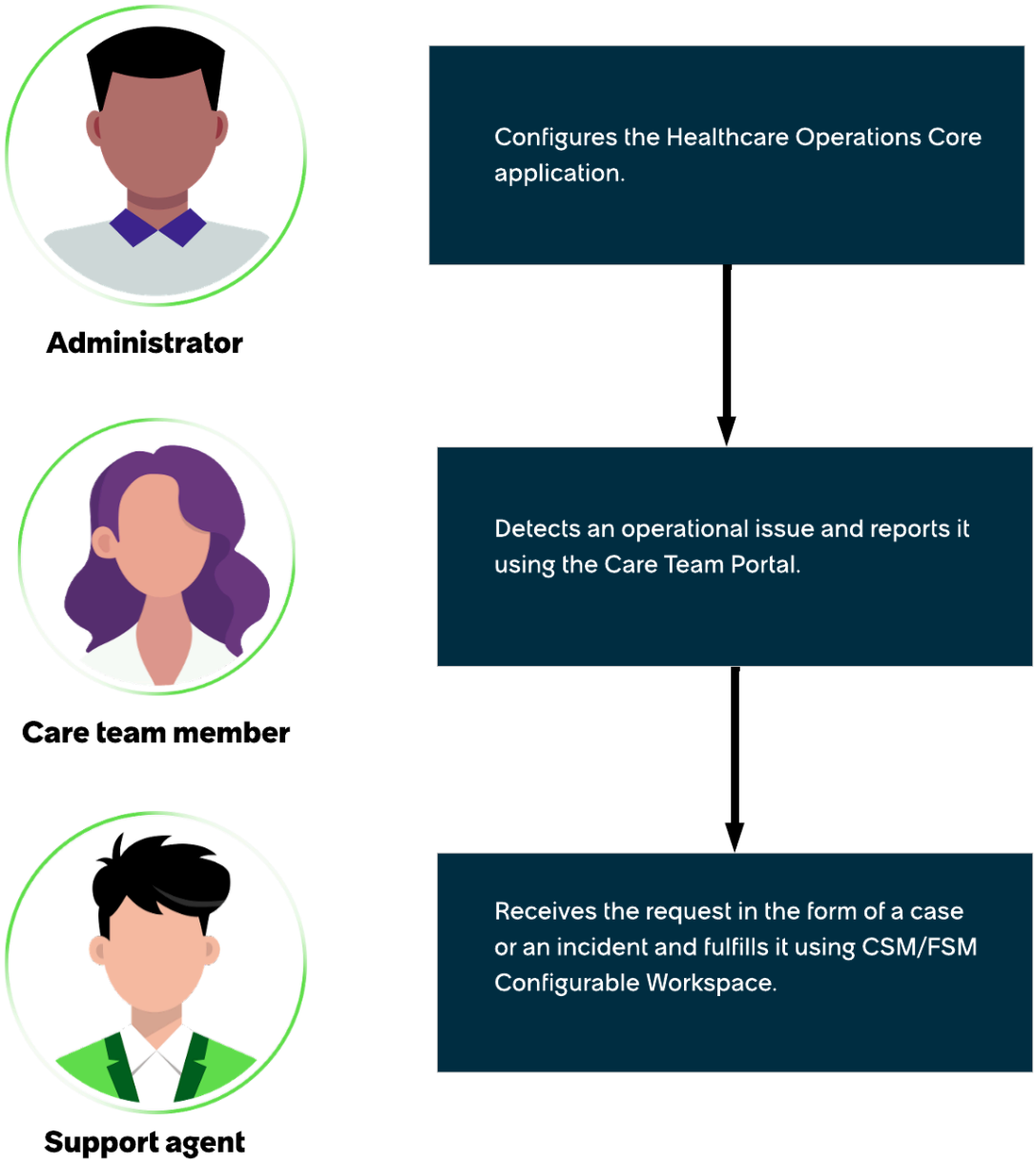
- Care Team Operations for Healthcare IT
- Care Team Operations for Biomed
- Care Team Operations for Facilities
- Care Team Operations for Environmental Services

Healthcare Operations Core users

User	Description
Nurse assistant	Nurse assistants provide basic care to patients in healthcare facilities, assisting with daily living, monitoring patient health, and providing vital support to nurses and medical staff.
Registered Nurse	Registered nurses are responsible for providing and coordinating patient care. This includes educating patients and their families about various health concerns, administering medications and treatments, and collaborating with other healthcare professionals to develop and implement care plans.
Unit Manager	Unit Managers oversee the operations of a specific unit within a healthcare facility, supervise staff, manage resources, and ensure the delivery of high-quality patient care.
Unit Secretary	Unit secretaries provide administrative support to nursing units and facilitate communication between staff, patients, and families while maintaining patient records.
Department Agent	Department agents create, view, edit, and fulfill service requests created by the care team on behalf of the hospital's ancillary departments.
Department Agent Manager	Department Agent Managers oversee the department agents and ensure that requests are fulfilled in an effective and timely manner.

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Healthcare Operations Core workflow



1. An administrator configures the Healthcare Operations Core application.
2. A care team member detects an operational issue and reports it using the Care Team Portal.
3. A supporting service agent receives the request in the form of a case or an incident and fulfills it using Workspace.

Healthcare Operations Core benefits

Benefit	Feature	Users
Provides a framework to expand operational cases to supporting services departments.	Healthcare Operations Case overview	Admin

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Benefit	Feature	Users
Gain visibility into operational cases that are related to your care team.	Care Team Portal	Care Team members

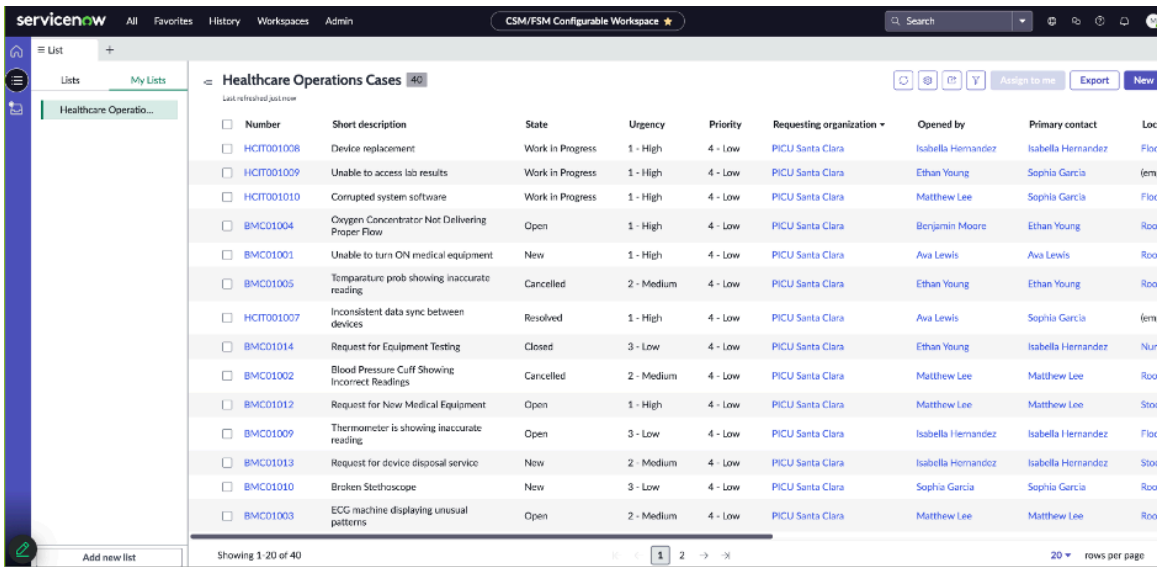
What to explore next

To learn more about configuring and using Healthcare Operations Core, see:

- Configuring Healthcare Operations Core
- Navigate the Care Team Portal
- Healthcare Operations Core Reference

Healthcare Operations Case overview

The Healthcare Operations Case [sn_hco_case] enables streamlined support for operational healthcare use cases.



The Healthcare Operations Case [sn_hco_case] table is an abstract, extendable table that stores healthcare operations-related cases. It provides a foundation for extending and building your own operational request types.

The Healthcare Operations Case type enables streamlined support for operational healthcare use cases by enabling administrators to create case types for use with the Care Team Portal.

By associating these cases with healthcare organizations, care team members can view all cases created for their team, unit, or healthcare organization.

For information on configuring the Healthcare Operations Case for your operational use cases, see Configuring Healthcare Operations Core.

Care Team Portal

Use the Care Team Portal to create requests for supporting service departments and maintain visibility into all requests created by you or your team.

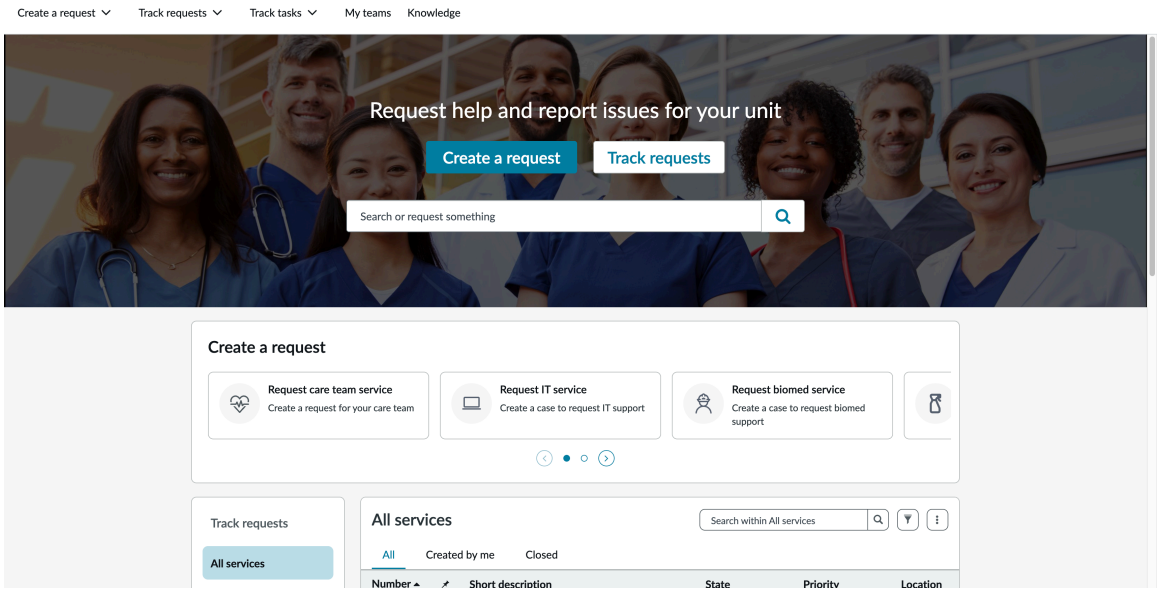
Care team members often rely on multiple, disconnected systems to report issues, leading to delays, frustration, and a lack of visibility into request status. This disconnection results in duplicate work, unnecessary escalations, and time taken away from patient care.

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The Care Team Portal, part of Healthcare Operations Core, centralizes issue reporting and provides real-time visibility into request statuses, reducing frustration and ensuring efficient support.

Pre-installed record producers for ancillary departments, depending on which additional plugins are installed, allow care teams to easily create and track support requests. This enhances productivity and allows teams to focus more on patient care.

The Care Team Portal provides a responsive portal experience that can be used by clinicians in hospitals to report and track issues for support services departments. This experience can be used on a standalone portal or embedded in EMR systems.



The Care Team Portal can also be embedded within Epic, with access to all features available in the browser experience. For instructions, see Embedding Care Team Portal in Epic Hyperspace via Hyperdrive.

The following plugins provide preconfigured record producers for use with Care Team Portal:

- Care Team Operations for Healthcare IT
- Care Team Operations for Biomed
- Care Team Operations for Facilities
- Care Team Operations for Environmental Services

For information on the features available with the Care Team Portal, see Navigate the Care Team Portal.

Accessing the Care Team Portal

To access the Care Team Portal from a ServiceNow instance, add the portal suffix **/careteam** after the instance URL.

For example,

```
https://<instance name>.service-now.com/careteam
```

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Virtual Agent in Care Team Portal

Virtual Agent, ServiceNow's conversational bot platform, is available when creating requests from the Care Team Portal.

Virtual Agent can be used to quickly obtain information, decide, and perform common work tasks.

To interact with Virtual Agent, simply select the chat window icon on the bottom right-hand corner of the screen.

For more information on Virtual Agent, see Virtual Agent as an application design element.

Configuring Healthcare Operations Core

Set up the Healthcare Operations Core application.

Configuration overview

1. Install Healthcare Operations Core

   The application includes demo data for Healthcare Operations Core and installs related ServiceNow Store applications and plugins if they aren't already installed.

2. Assign roles to Healthcare Operations Core users

   Assign specific roles to give Healthcare Operations Core users visibility into healthcare organizations and the hierarchies they manage.

3. Create a group for all care team members in Healthcare Operations Core

   Create a group for team members with the sn_hco.care_team_member role assigned so that users added to this group will inherit the collection of roles for Healthcare Operations Core.

4. Create a group for all care team managers in Healthcare Operations Core

   Create a group for team members with the sn_hco.care_team_manager role assigned so that users added to this group inherits the collection of roles for Healthcare Operations Core.

5. Setting up healthcare locations and healthcare organizations
6. Create healthcare providers

   Create a healthcare provider and associate it with a parent healthcare organization and a common location.

7. Create healthcare departments

   Create a healthcare department and associate it with a parent healthcare organization and a common location.

8. Create organizational teams in Healthcare Operations Core

   Create a healthcare organization to associate with your healthcare department.

9. Organizing your healthcare organizations for Healthcare Operations Core

   Properly organize your healthcare organizations to reflect your team hierarchies.

10. Add or remove members in Healthcare Operations Core

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Add or remove members from your healthcare organizations.

11. Configure global system properties to edit members in Healthcare Operations Core

    Add or remove members from your healthcare organizations.

12. Configure the abstract case type for Healthcare Operations Core case types

    Extend the Healthcare Operations case [sn_hco_case] to create custom case types for use with Healthcare Operations Core and related plugins by creating a child table from the Healthcare Operations Core case type.

13. Add menu items into the Care Team Portal with Healthcare Operations Core

    Add more menu items into the Care Team Portal for easy user access.

14. Embedding Care Team Portal in Epic Hyperspace via Hyperdrive

    Configure the Care Team Portal by embedding it into Epic Hyperspace via Hyperdrive and enabling OIDC authentication.

15. Update variables in record producers to capture tokenized data from Epic Hyperspace

    Update the variable values in existing record producers to capture tokenized data from Epic.

16. Configure iFrame embedding for Care Team Portal

    For the Care Team Portal to successfully launch in Hyperspace via Hyperdrive, the portal must be configured to work within an iFrame.

17. Enable Multi-Provider SSO for your ServiceNow instance

    Ensure that Multiple Provider SSO is enabled and configured correctly for Care Team Portal to authenticate with Epic Hyperspace via Hyperdrive.

18. Authenticate SMART on FHIR for use with the Care Team Portal in Hyperspace via Hyperdrive

    Set up your FHIR app with the correct configurations to allow single sign-on for EPIC users to access the Care Team Portal inside EPIC Hyperspace via Hyperdrive.

19. Create an Identity Provider on your ServiceNow instance for Healthcare Operations Core

    Set up an Identity Provider in your ServiceNow instance to enable OIDC for Healthcare Operations Core.

20. Configure your Identity Provider for Care Team Portal

    Configure your Identity Provider to ensure successful user authentication in Care Team Portal.

21. Configure the integration settings in the Hyperdrive Client Test Harness for Care Team Portal

    Once the Care Team Portal is configured, create a launch URL that can then be configured inside the Epic Hyperdrive Client Test Harness for testing.

Install Healthcare Operations Core

You can install the Healthcare Operations Core application [sn_hco] if you have the admin role. The application includes demo data for Healthcare Operations Core and installs related ServiceNow® Store applications and plugins if they aren't already installed.

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Before you begin
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 Operations Core.

Procedure
1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Healthcare Operations Core application [sn_hco] using the filter criteria and search bar.
   You can search for the application by its name or ID. If you can't 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.
3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. Select **Install**.

Setting up roles and responsibilities for Healthcare Operations users

To manage access effectively in Healthcare Operations Core (HCO), first understand how roles and responsibilities work together. These concepts build on the Service Model Foundation (SMF) but are adapted for HCO-specific use cases.

Roles

Roles define table-level access. They determine which objects you can interact with and what actions you can perform. IE, (CRUD: Create, Read, Update, Delete).

Example: The `sn_hco.care_team_member` role enables you to work with HCO cases.

Responsibilities

Responsibilities control record-level access within tables. Even if your role grants access to a table, responsibilities decide which specific records you can view or edit.

Responsibilities in HCO are based on Service Model Foundation responsibilities, but adapted (relabeled) for healthcare operations using Related Party Configurations.

Example: The Care Team Member responsibility limits your access to cases for healthcare organizations that you're a member of.

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Healthcare Operations Core Responsibility	Inherited Service Model Foundation responsibility
Care Team Member	Service location business contributor
Care Team Manager	Service location business manager
Support Department Agent	Location Support Agent

Why responsibilities matter

Think of roles as the door to the building and responsibilities as the rooms you're allowed to enter.

This layered approach segregates data so that members of healthcare organizations only see records that pertain to that healthcare organization that they have responsibility for.

Example scenario

You're a care team member associated with the Intensive Care Unit (ICU) at a hospital.

- Role: The `sn_hco.care_team_member` role gives you access to HCO cases.
- Responsibility: The Care Team Member responsibility restricts access to cases within that ICU only.

Result: You can work on HCO cases related to that ICU, but can't view cases for other units.

Roles and responsibilities in Healthcare Operations Core

Role	Responsibility	Description
`sn_hco.care_team_member`	Care Team Member	Use the Care Team Member responsibility to work on cases to report issues within an assigned unit.
`sn_hco.care_team_manager`	Care Team Manager	Use the Care Team Manager responsibility to report issues within an assigned unit and manage the members of your healthcare organization.
`sn_hco.loc_support_agent`	Support Department Agent	The Support Department Agent responsibility is used by the Care Team Operations applications so agents can fulfill cases for their specific department.

What to do next

- Assign roles to Healthcare Operations Core users
- Assign responsibilities to Healthcare Operations Core users

Assign roles to Healthcare Operations Core users

Assign specific roles to give Healthcare Operations Core users visibility into healthcare organizations and the hierarchies they manage.

Before you begin
Role required: admin

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About this task

Roles control access to features, capabilities, and data in the Healthcare Operations Core application.

You can assign roles to individual users or groups. When you apply roles to groups, the members of those groups inherit those roles.

Note:
User roles can be configured during the initial setup process for healthcare organizations, or at any time thereafter as needed.

Example: You could create a group called “HCO Team Members” and assign the role sn_hco.care_team_member to the group. Then, when importing users, you would associate the users that are care team members with this group.

Note:
This group doesn’t give them direct access to care team operations. They must still be associated with a healthcare organization as a member then assigned responsibilities.

For instructions on assigning roles to groups, see Create a group for all care team members in Healthcare Operations Core

Roles included with Healthcare Operations Core

sn_hco.care_team_member	• sn_customerservice.service_organization_contributor • sn_hcls.foundation_data_viewer	Has access to create and view healthcare cases.
sn_hco.care_team_manager	• sn_hco.care_team_member • sn_customerservice.svc_location_manager_contributor	Has access to create and view healthcare cases. Can add members to healthcare organizations.

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**.
4. Select **Save**.

Assign responsibilities to Healthcare Operations Core users

Assign responsibilities to users in Healthcare Operations Core to dictate which specific records users are authorized to view or modify.

Before you begin

Role required: admin

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About this task

You can edit the responsibilities of Healthcare Operations Core users when adding or removing members from your healthcare organizations, or at any time as needed.

Care Team Member	Service location business contributor
Care Team Manager	Service location business manager

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **All**.
2. Select the parent organization.
3. Navigate to the **Members** related list.
4. Select **Edit members**.
5. In **Responsibility**, select the intended responsibility for the user.
6. Use the arrows between the **Available** and **Selected** panels to add the member.

Note:

If a newly added user isn't populated in the Available list, search for them manually using the lookup icon.

On occasion, newly added members don't appear within the Selected panel due to property configurations. If this occurs, see Configure global system properties to edit members in Healthcare Operations Core.

7. Select **Save**.

Create a group for all care team members in Healthcare Operations Core

Create a group for care team members with the sn_hco.care_team_member role assigned so that users added to this group will inherit the collection of roles for Healthcare Operations Core.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Click **Edit**.
7. Add the sn_hco.care_team_member role into the Roles List.
8. Click **Save**.

Result

A user group has been created that you can assign care team members to when doing automated user imports.

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Example - Create a group for all team members in Healthcare Operations Core

Explore how a group is created for users that care team members can later be added to to inherit the correct permissions.

Before you begin
Role required: admin

About this task
Scenario: As a ServiceNow administrator for a hospital, Armand faces the challenge of configuring over a thousand users for Healthcare Operations care teams. Manually creating each user account and assigning individual role permissions would be extremely time-consuming. To streamline this process, Armand creates a group in ServiceNow with the appropriate role permissions for care team members, allowing him to efficiently assign the correct permissions to many users during automated imports by linking them to this group.

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter **HCO Team Members**.
4. In the Description field, enter **Any user who will be a member of a Healthcare Organization.**
5. Fill in other fields as needed.
6. Navigate to the roles related list.
7. Click **Edit**.
8. Add the **sn_hco.care_team_member** role into the Roles List.
9. Click **Save**.

Result
A group for all team members has been created. Armand can assign care team members to this group when doing automated imports.

Create a group for all care team managers in Healthcare Operations Core

Create a group for care team managers with the sn_hco.care_team_manager role assigned so that users added to this group inherits the collection of roles for Healthcare Operations Core.

Before you begin
Role required: admin

About this task

Note:
The sn_hco.care_team_manager role inherits the sn_hco.care_team_member role, so users assigned to your team manager group don't need to be assigned to your team member group.

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.

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5. Navigate to the roles related list.
6. Select **Edit**.
7. Add the sn_hco.care_team_manager role into the Roles List.
8. Select **Save**.

Result
A user group has been created that you can assign care team managers to when doing automated user imports.

Example - Create a group for all team managers in Healthcare Operations Core

Explore how a group is created for users that care team managers can later be added to to inherit the correct permissions.

Before you begin
Role required: admin

About this task
Scenario: As a ServiceNow administrator for a hospital, Armand faces the challenge of configuring over a thousand users for Healthcare Operations care teams. Manually creating each user account and assigning individual role permissions would be extremely time-consuming. To streamline this process, Armand creates a group in ServiceNow with the appropriate role permissions for care team managers, allowing him to efficiently assign the correct permissions to many users during automated imports by linking them to this group.

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter **HCO Team Managers**.
4. In the Description field, enter **Any user who will manage a healthcare list of members.**
5. Fill in other fields as needed.
6. Navigate to the roles related list.
7. Click **Edit**.
8. Add the **sn_hco.care_team_manager** role into the Roles List.
9. Click **Save**.

Result
A group for all team managers has been created. Armand can assign care team members to this group when doing automated imports.

Add or remove members in Healthcare Operations Core

Add or remove members from your healthcare organizations.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations** > **All**.
2. Select the Healthcare organization that you want to edit a member of.

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3. Navigate to the **Members** related list.
4. Select **Edit members**.
5. In **Responsibility**, select the responsibility you want to edit the members of.
   Options are:
   - Care team member
   - Care team manager
6. Use the arrows between the **Available** and **Selected** panels to indicate which members belong to each responsibility.

   Note:

   If a newly added user isn't populated in the Available list, search for them manually using the lookup icon.

   On occasion, newly added members won't appear within the Selected panel due to property configurations. If this occurs, see Configure global system properties to edit members in Healthcare Operations Core.

7. Select **Save**.

Configure global system properties to edit members in Healthcare Operations Core

A global system property must be configured to properly use the Edit Members functionality in Healthcare Operations Core.

Before you begin

On occasion, newly added members won't appear within the Selected panel when editing members in Healthcare Operations Core.

This issue is often caused by the limited number of items that are shown in the list collector.

To fix this issue, create a global system property with the name glide.xmlhttp.excessive, a type of integer, and a large number for the value limit based on the total number of users in the application.

Role required: admin

Procedure

1. Set your scope to **Global**.
2. Navigate to **All** > **System Properties**.
3. Select **New**.
4. Fill in the following fields:
   a. Name - glide.xmlhttp.excessive
   b. Type - integer
   c. Value - Enter a high value here that represents the total potential number of users. For example, 10000.
5. Select **Submit**.

Result

The "Available" and "Selected" fields on the Edit Member table displays all available selections.

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Setting up healthcare locations and healthcare organizations

Understand how healthcare locations and healthcare organizations function and should be organized to set up your care teams and the physical locations they operate in correctly.

Healthcare organizations

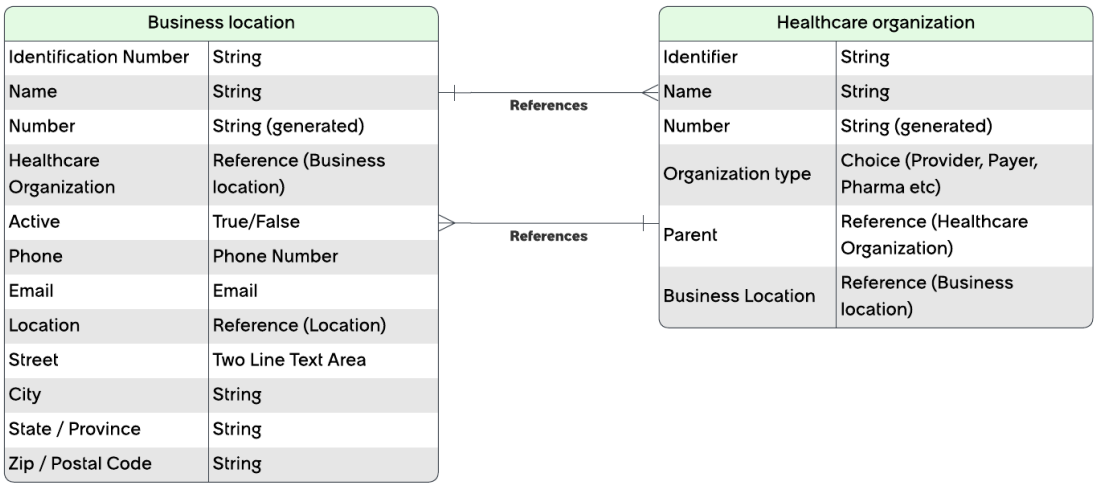
The **healthcare organization** [sn_hcls_organization] table stores the details of a healthcare organization in your ServiceNow instance. It's the authoritative reference for defining the organization hierarchy within a healthcare delivery network, capturing the structure that supports operations like access control, visibility, and routing.

An example healthcare organization hierarchy might look like:

HQ → Hospital → Department → Unit

Structuring healthcare organizations correctly is vital to healthcare operations as it defines the organizational structure, influencing visibility, responsibility, and routing.

Healthcare organization [sn_hcls_organization] table technical details



When a healthcare organization is created, an associated business location is also created with the same name that references the healthcare organization. A bidirectional reference exists between the two tables. A business location is an extension of a service organization.

A healthcare organization is associated with a business location, either internal or external.

It contains specific attributes not found in the service organization table. For example, organization type.

Use the **parent organization** field to create multi-level hierarchies by labeling healthcare organizations as parent to other healthcare organizations.

The **healthcare organization location association** table is used to store the explicit link between healthcare locations and their owning healthcare organization.

For information on the fields present in the Healthcare organization table, see Healthcare organization table.

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Healthcare locations

The **healthcare location** [sn_hcls_location] table represents the physical or virtual places where care and operational work occur — campuses, buildings, wings, units, rooms, and other serviceable spaces.

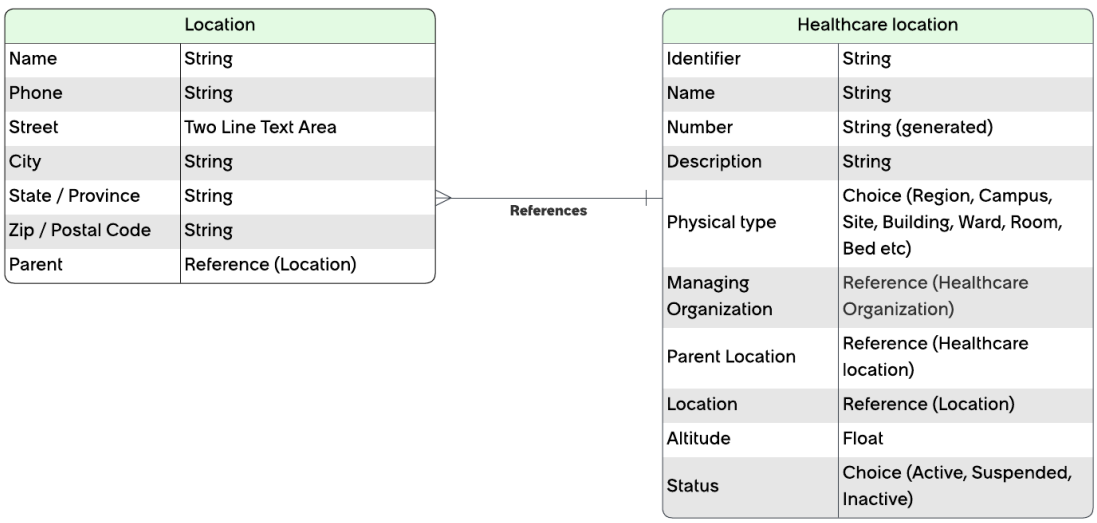
An example healthcare location hierarchy might look like:

Campus → **Hospital Building** → **Pediatrics Wing** → **PICU Unit** → **Bed** or **Room**

Structuring healthcare locations correctly enables agents and care teams to reference the precise location of issues. For example, an IT support agent can identify what room in the PICU unit has a broken monitor that needs repair.

By tying work to a specific location, ambiguity is reduced in requests and escalations, enabling for more efficient responses from care teams.

Healthcare location [sn_hcls_location] table technical details



The healthcare location table provides the ability to map common locations to healthcare organizations.

The common location [cmn_location] table provides the basis for location setup across the ServiceNow platform. Healthcare locations leverage common locations to extend the existing data into the HCLS data model.

Healthcare locations enable you to add attributes that aren't available in the common location table. For example, the altitude field is available in healthcare locations without being added to all common locations.

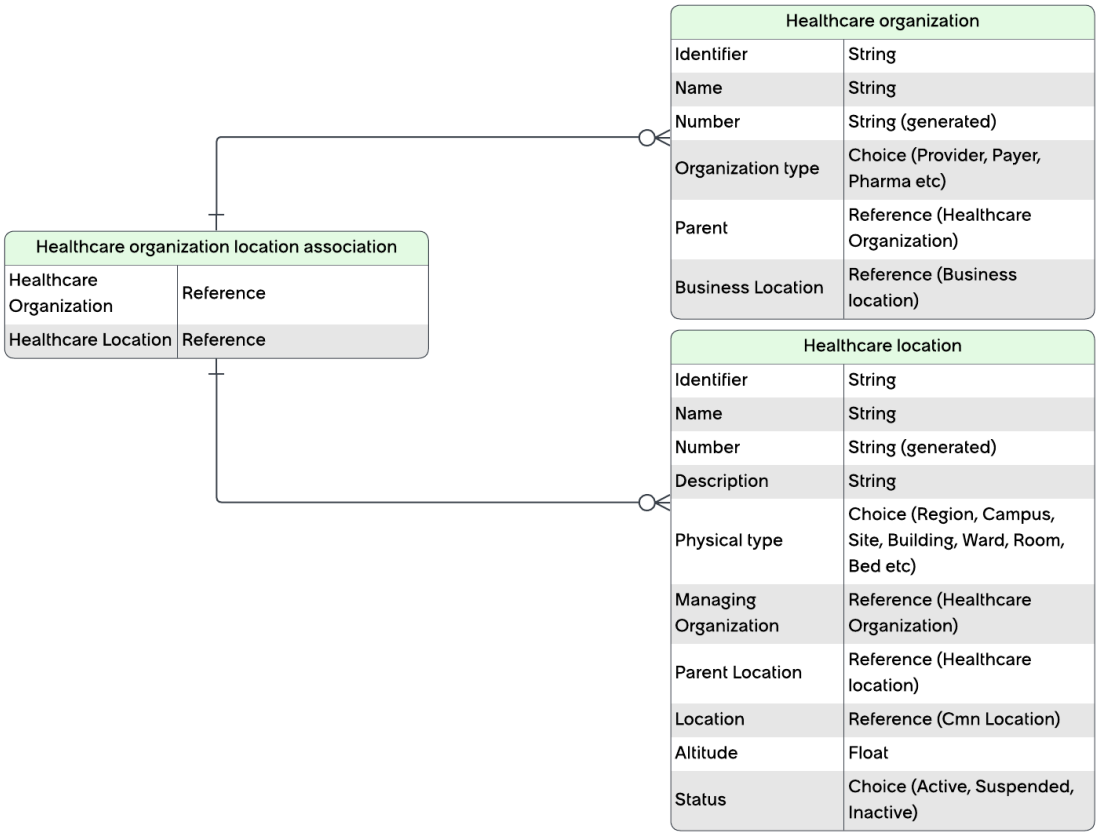
The **healthcare organization location association** table limits the common locations shown to care team members when reporting issues, displaying only those that their unit is responsible for. This table is used to store the explicit link between healthcare locations and their owning healthcare organization.

Use the **Parent location** field to create multi-level hierarchies by labeling healthcare locations as parent to other healthcare locations.

For information on the fields present in the Healthcare location table, see Healthcare location table.

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Associating healthcare locations and healthcare organizations



The **healthcare organization location association** table [sn_hcls_organization_location_association] establishes a definitive connection between healthcare organizations and healthcare locations. This connection determines the healthcare organization responsible for a particular location.

Healthcare locations define which common locations a healthcare organization is responsible for. When a member of a care team unit goes to report an issue, they're presented with a limited list of common locations that their unit is responsible for. This eliminates the need to sift through all available common locations in the system.

When creating a healthcare organization or a healthcare location, you can use this table to associate a healthcare location with a healthcare organization (or vice versa).

For more information on this process, see Associate healthcare locations with a healthcare organizations

How to set up healthcare organizations and healthcare locations

To create healthcare locations and healthcare organizations, see the following topics.

1. Create a healthcare location
2. Create a healthcare organization
3. Associate healthcare locations with a healthcare organizations

Create a healthcare organization

Create a healthcare organization for use with Healthcare and Life Sciences Service Management Core.

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Before you begin
Role required: admin

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

When a healthcare organization is created, an associated business location is also created with the same name that references the healthcare organization.

For more information, see Setting up healthcare locations and healthcare organizations and Healthcare organization table.

Procedure
1. Navigate to **All** > **HCLS Service Management** > **Organization data** > **Healthcare organizations**.
2. Select **New**.
3. Fill in the following fields.

Field	Description
Name	The name of your healthcare organization.
Organization type	Type of healthcare organization you represent. The following types are available by default: ○ Clinical research sponsor ○ Community group ○ Educational institute ○ Government ○ Healthcare provider ○ Hospital department ○ Non-healthcare business ○ Organizational team ○ Other ○ Payer

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Field	Description
	○ Pharmaceutical company ○ Religious institution For more information about the available organization types, see organization types defined in the FHIR specifications.
Parent organization	Parent organization associated with the organization.
Phone	Phone number of the organization.
Email	Email address associated with the organization.
Description	A description of this healthcare organization.
This is an internal location	Indicates whether this organization is considered an internal location.
Common location	The associated common location.

4. Select **Save**.

Create a healthcare location

Create healthcare locations to designate the locations in which your care teams operate.

Before you begin

Role required: admin

About this task

Healthcare locations are the physical or virtual places where care and operational work occur—campuses, buildings, wings, units, rooms, and other serviceable spaces. .

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

For more information, see Setting up healthcare locations and healthcare organizations and Healthcare location table.

Procedure

1. Navigate to **All** > **HCLS Service Management** > **Organization data** > **Healthcare location**.
2. Select **New**.
3. Fill in the following fields.

Field	Description
Name	Name to identify the healthcare location.
Physical type	Physical form of the location.

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Field	Description
	The following types are available by default: ○ Area ○ Bed ○ Building ○ Cabinet ○ Corridor ○ Jurisdiction ○ Level ○ Room ○ Road ○ Site ○ Vehicle ○ Wing ○ Ward For more information about the available physical types, see location types defined in the FHIR specifications.
Parent location	The parent location of this healthcare location. Set your parent location to create a hierarchy of locations in which the current healthcare location is nested under that parent location. For more information, see Example - Organizing your healthcare locations.
Location	Physical location of this healthcare location. Entry selected here populates address fields.

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Field	Description
	Value here references the Common Location [cmn_location] table.
Latitude	Latitude of the absolute geographic location.
Longitude	Longitude of the absolute geographic location.
Altitude	Altitude of the absolute geographic location.
Status	Option to indicate whether the healthcare location is in use. The following statuses are available by default: ○ Active ○ Inactive ○ Suspended For more information about the available statuses, see location statuses defined in the FHIR specifications.
Street	Mailing street address of the physical location.
City	City in which the physical location is located.
State/Province	State or province in which the physical location is located.
Zip / Postal Code	ZIP or postal code for the physical location.
Phone	Phone number of the physical location.
Identifier	Unique identifier associated with this location.
Description	A description of this healthcare location.

4. Select **Submit**.

Associate healthcare locations with a healthcare organizations

Associate healthcare locations with healthcare organizations.

About this task

In scenarios where a healthcare location is being utilized by multiple healthcare organizations, you can associate those organizations with a location.

You can also associate multiple healthcare organizations with a healthcare location, or vice versa.

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For example, a single ICU room in a hospital might be used by multiple departments, such as cardiology and neurology. You would associate those departments (Healthcare organizations) with the ICU room (a Healthcare location) using the steps that follow.

For more information, see Setting up healthcare locations and healthcare organizations.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **HCLS Service Management** > **Organization data** > **Healthcare organizations**.
2. Select the Healthcare organization you want to associate with a healthcare location.
3. Navigate to the **Healthcare locations** related list.
4. Click **Edit**.
5. In the Collection panel, select the Healthcare locations you want added to this Healthcare organization and use the right arrow to move them into the Healthcare locations List for this organization.

   Note:
   To remove a location from an organization, simply use the left arrow to move the location from the Healthcare locations List into the Collection list.

6. Click **Save**.

Example - Associate a healthcare location with a healthcare organization

Explore how a healthcare location associated with an existing healthcare organization, so that users in the organization can select the location when creating support requests using Care Team Operations.

Before you begin
Role required: admin

About this task
Scenario: At Alectri Health Santa Clara Hospital, an ICU room is being used by both the cardiology and neurology departments. Armand, a ServiceNow administrator, needs to associate this room with multiple departments so care team members associated with these departments can select the location when creating support requests using care team operations.

Procedure

1. Navigate to **All > Healthcare Operations > Healthcare Organizations**.
2. Select **Alectri Health Santa Clara Cardiology.**

   Note: This is the healthcare organization to be associated with a location.

3. Navigate to the **Healthcare locations** related list.
4. Click **Edit**.
5. In the Collection panel, select **ICU Room** and use the right arrow to move it into the Healthcare Locations panel.
6. Select **Save**.
7. Repeat the above steps for **Alectri Health Santa Clara Neurology.**

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Result
The ICU room has now been associated with both Alectri Health Santa Clara neurology and cardiology departments and can be selected by care team members of both departments when creating support requests.

Create healthcare providers

Create a healthcare provider and associate it with a parent healthcare organization and a common location.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare providers**.
2. Select **New**.
3. Fill in the following fields.

Note:

The Organization type field is automatically set to healthcare provider and is read only.

Field	Description
Name	Name to identify the healthcare provider.
Parent Organization	Parent organization associated with the provider.
Manager	The manager associated with this healthcare provider.
Phone	Phone number of the provider.
Email	Email address associated with the provider.
Description	A description of this healthcare provider.
This is an internal location	Indicates that this healthcare provider is considered an internal location.
Common Location	The common location associated with this healthcare provider.

4. Select **Submit**.

Create healthcare departments

Create a healthcare department and associate it with a parent healthcare organization and a common location.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare departments**.
2. Select **New**.

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3. Fill in the following fields.

Note:

The Organization type field is automatically set to healthcare department and is read only.

Field	Description
Name	Name to identify the healthcare department.
Parent Organization	Parent organization associated with the department.
Manager	The manager associated with this healthcare department.
Phone	Phone number of the department.
Email	Email address associated with the department.
Description	A description of this healthcare department.
This is an internal location	Indicates that this healthcare department is considered an internal location.
Common Location	The common location associated with this department.

4. Select **Submit**.

Create organizational teams in Healthcare Operations Core

Create a healthcare organization to associate with your healthcare department.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations**.
2. Select **New**.
3. Ensure the **Organization type** field is set to **Organizational Team**.
4. Fill in the following fields.

Field	Description
Name	Name to identify the organizational team.
Parent Organization	Parent organization associated with the organizational team.
Manager	The manager associated with this organizational team.
Phone	Phone number of the organizational team.

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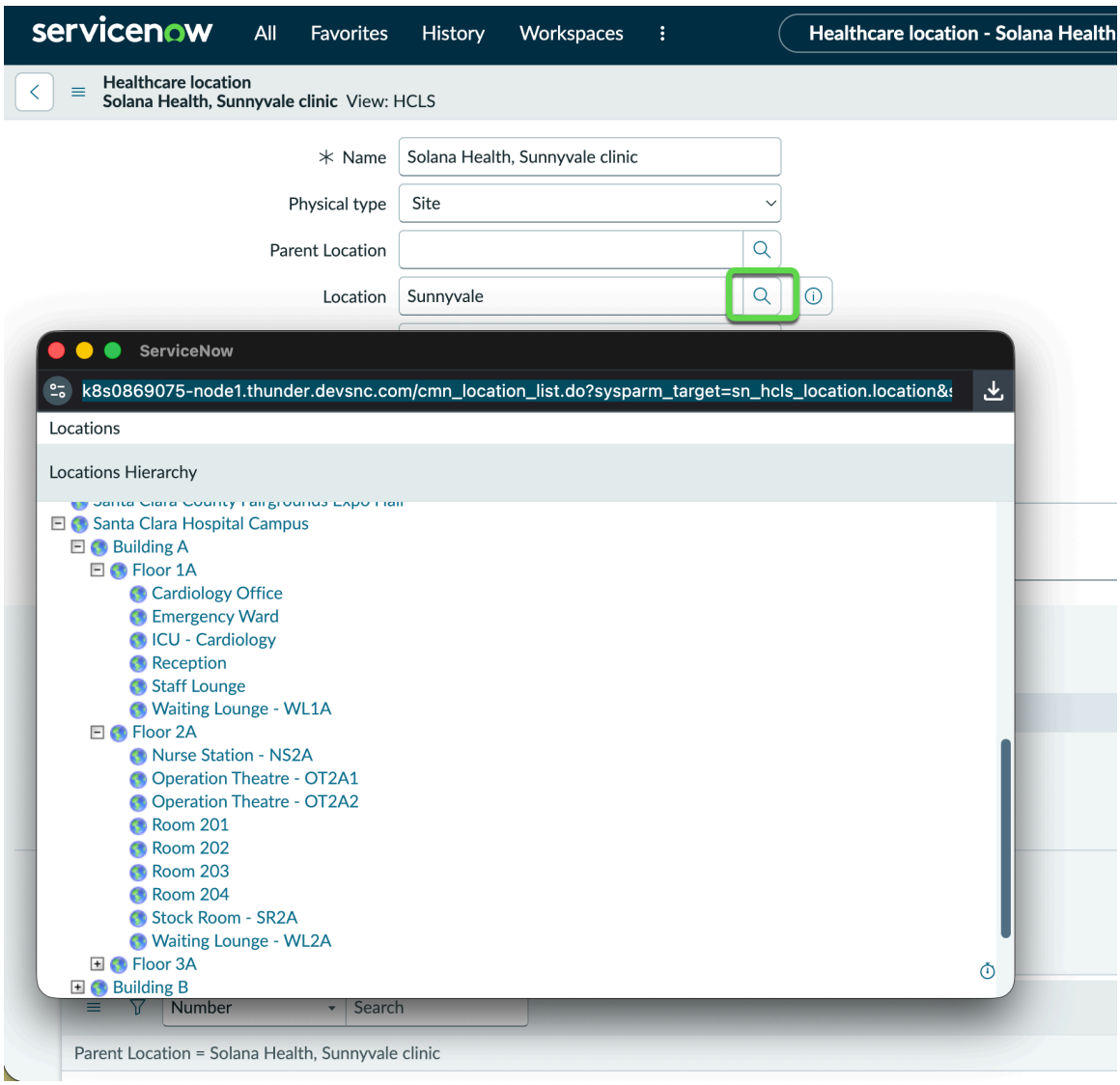
Field	Description
Email	Email address associated with the organizational team.
Description	A description of this organizational team.
This is an internal location	Indicates that this organizational team is considered an internal location.
Common Location	The common location associated with this organizational team.

5. Select **Submit**.

Organizing your Healthcare Locations

Your healthcare locations should be organized based on the physical layouts of the locations in which your care teams operate.

When you're creating a location, you can navigate the existing location hierarchy to select where the location being newly created should reside:



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When a location is created, the **Location hierarchy** panel displays up to three parent levels higher within a location's hierarchy.

Note:
The location hierarchy shows only when the healthcare location is opened from the Healthcare Operations Core app module.

Organizing your healthcare organizations for Healthcare Operations Core

Properly organize your healthcare organizations to reflect your team hierarchies.

In Healthcare Operations Core, healthcare organizations typically exist in a multi-level hierarchy.

The Healthcare Operations app menu shows one example of what this structure might look like within your healthcare organization.



Healthcare organizations use the child organization-related list to display their direct child organizations.

The Business locations served value determines how you track the relationship between requesting and fulfilling healthcare organizations. You can set hierarchy or relationship-based support criteria for your healthcare locations.

The following are all Healthcare organizations related lists and their features:

- Child organization - select **New** in the child organizations related list to add a new child organization to the current healthcare organization record. When a healthcare organization is created, the value it lists for **Parent organization** indicates who the parent organization will be.
- Members – Displays all members of this organization. Select **Edit** to add, remove, or alter the responsibilities of members.
- Case opened by members – Displays all cases currently opened by members of this organization.
- Healthcare locations – Displays all associated healthcare locations with this healthcare organization. Select **Edit** manage these associations.

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- Assignment groups – Displays all associated assignment groups.
- Available services – Displays all available services within this organization.
- Service organization customer criteria – Displays which customers are serviced by this healthcare organization.

Example - Create a parent organization (HQ)

Explore how a parent organization is created for Healthcare Operations, under which departments or similar sub-organizations can then be created and organized.

Before you begin
Role required: admin

About this task
Scenario: Armand, a ServiceNow administrator for a hospital, needs to set up a parent organization within Healthcare Operations. This parent organization will serve as the top-level entity under which various healthcare providers and facilities will be organized. Armand creates a parent organization in ServiceNow to ensure that all related entities inherit the correct organizational structure and permissions.

Procedure

1. Navigate to **All** > **Healthcare organizations** > **All**.
2. Select **New**.
3. Fill in the following fields.
   - Name - Enter **Alectri Health**.
   - Organization type - Enter **Healthcare Provider**.
4. Select **Submit**.

Result
A parent organization representing HQ, Alectri Health, has been created. This serves as the top-level entity for healthcare organizations within this organization.

Example - Create a hospital

Explore how a hospital is created under an existing parent organization for Healthcare Operations, under which departments or similar sub-organizations can then be created and organized under.

Before you begin
Role required: admin

About this task
Scenario: Armand, a ServiceNow administrator for a hospital, needs to set up a pediatrics department at Alectri Santa Clara hospital. Armand creates the department within the hospital in ServiceNow so he can ensure that all related entities inherit the correct organizational structure and permissions.

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations** > **All**.
2. Select **New**.
3. Fill in the following fields.

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- Name - Enter **Alectri Santa Clara**.
- Organization type - Enter **Healthcare Provider**.
- Parent organization - Enter the parent organization created in Example - Create a parent organization (HQ). **Alectri Health**.

4. Select **Submit**.

Result
A hospital, **Alectri Santa Clara**, is created under the parent organization **Alectri Health**. Armand can now repeat this process for all other hospitals that fall under that parent organization.

Example - Create a department

Explore how a department is created under an existing hospital for Healthcare Operations, under which department organization teams can then be created.

Before you begin
Role required: admin

About this task
Scenario: Armand, a ServiceNow administrator for a hospital, needs to set up a pediatrics department at Alectri Santa Clara hospital. Armand creates the department within the hospital in ServiceNow so it is ensured that all related entities inherit the correct organizational structure and permissions.

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations** > **All**.
2. Select **New**.
3. Fill in the following fields.
   - Name - Enter **Pediatrics Alectri Santa Clara**.
   - Organization type - Select **Healthcare Department**.
   - Parent organization - Select the parent hospital created in Example - Create a hospital, **Alectri Santa Clara**.
4. Select **Submit**.

Result
The **Pediatrics Alectri Santa Clara Department** has been created under the parent hospital **Alectri Santa Clara**. Armand can then repeat this process for all other departments within this hospital as needed.

Example - Create a department organization team

Explore how a department organization team is created under an existing department for Healthcare Operations.

Before you begin
Role required: admin

About this task
Scenario: Armand, a ServiceNow administrator for a hospital, needs to set up the Pediatrics department organization team at Pediatrics Alectri Santa Clata. These teams need to be associated with the specific department they are attached to. By correctly setting up department organizations under the parent department, this ensures that all related entities inherit the correct organizational structure and permissions.

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Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations** > **All**.
2. Select **New**.
3. Fill in the following fields.
   - Name - Enter **Pediatrics Alectri Santa Clara**.
   - Organization type - Select **Organization team**.
   - Parent organization - Select the parent department created in Example - Create a department, **Pediatrics Alectri Santa Clara**.
4. Select **Submit**.

Result

The General Pediatric Alectri Santa Clara department organization team has been created under the parent department Pediatrics Alectri Santa Clara. This setup ensures a streamlined and efficient organizational structure for managing various teams within the department.

Configure the abstract case type for Healthcare Operations Core case types

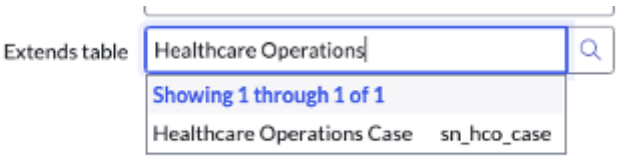
Extend the Healthcare Operations case [sn_hco_case] to create custom case types for use with Healthcare Operations Core and related plugins by creating a child table from the Healthcare Operations Core case type.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **System Definition** > **Tables**.
2. Select **New**.



3. Set **Extends table** to Healthcare Operations Case [sn_hco_case].
4. Fill in the other fields as needed.
   For information on these fields, see Create a table in the ServiceNow platform documentation.
5. Click **Submit**.

Note: To add a field to the extended child tables, refer to the Add and customize a field in a table in the ServiceNow platform documentation.

Add menu items into the Care Team Portal with Healthcare Operations Core

Add more menu items into the Care Team Portal for easy user access.

Before you begin

Role required: admin

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Procedure

1. Navigate to **All** > **Service Portals** > **Portals**.
2. Select **Care Team Portal**.
3. Next to the **Main menu** field, select **Preview this record** and open the record.
4. In the Menu Items related list, select **More**.
5. In the Menu Items related list, select **New**.
6. On the form, fill in the fields.
   For more information about the form fields and descriptions, see Menu Item form.
7. Select **Submit**.

Embedding Care Team Portal in Epic Hyperspace via Hyperdrive

Configure the Care Team Portal by embedding it into Epic Hyperspace via Hyperdrive and enabling SMART on FHIR authentication.

1. Update variables in record producers to capture tokenized data from Epic Hyperspace

   Update the variable values in existing record producers to capture tokenized data from Epic.

2. Configure iFrame embedding for Care Team Portal

   For the Care Team Portal to successfully launch in Hyperspace via Hyperdrive, the portal must be configured to work within an iFrame.

3. Enable Multi-Provider SSO for your ServiceNow instance

   Ensure that Multiple Provider SSO is enabled and configured correctly for Care Team Portal to authenticate with Epic Hyperspace via Hyperdrive.

4. Authenticate SMART on FHIR for use with the Care Team Portal in Hyperspace via Hyperdrive

   Set up your FHIR app with the correct configurations to allow single sign-on for EPIC users to access the Care Team Portal inside EPIC Hyperspace via Hyperdrive.

5. Create an Identity Provider on your ServiceNow instance for Healthcare Operations Core

   Set up an Identity Provider in your ServiceNow instance to enable OIDC for Healthcare Operations Core.

6. Configure your Identity Provider for Care Team Portal

   Configure your Identity Provider to ensure successful user authentication in Care Team Portal.

7. Configure the integration settings in the Hyperdrive Client Test Harness for Care Team Portal

   Once the Care Team Portal is configured, create a launch URL that can then be configured inside the Epic Hyperdrive Client Test Harness for testing.

Update variables in record producers to capture tokenized data from Epic Hyperspace

Update the variable values in existing record producers to capture tokenized data from Epic.

Before you begin

Role required: admin

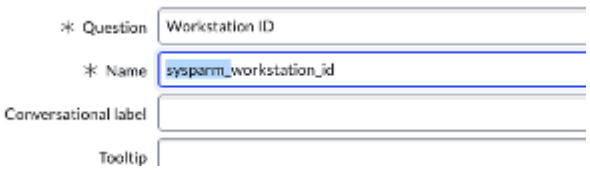
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About this task

When the Care Team Portal is launched inside of Epic Hyperspace via Hyperdrive, record producers can capture Epic launch tokens from the oAuth launch context to populate record producer variables.

This capture is possible due to the **Setup launch parameters from Epic** variable set, which includes the script **Populate launch data from Epic**.

To capture the launch tokens protected and shared by oAuth, a variable must be created on the record producer and the name must start with “sysparm_”. This same variable name must be included as a key in Epic's FDI record launch context configuration.



For example, to capture the “Workstation ID” field from an EMR system, the name value of the variable should “sysparm_workstation_id” and the launch parameter would be `sysparm_workstation_id` with the value set to `=%WORKSTATIONID%`.

For information about configuring launch parameters in Epic, see Configure the integration settings in the Hyperdrive Client Test Harness for Care Team Portal.

Procedure

1. In the Record Producer, navigate to the **Variables** related list.
2. Select **New**.
3. Fill in fields as needed.
4. Confirm that the name value of all variables begins with **sysparm_** for any field in which you want to capture data coming from an EMR system.
5. Select **Submit**.

Configure iFrame embedding for Care Team Portal

For the Care Team Portal to successfully launch in Hyperspace via Hyperdrive, the portal must be configured to work within an iFrame.

Before you begin

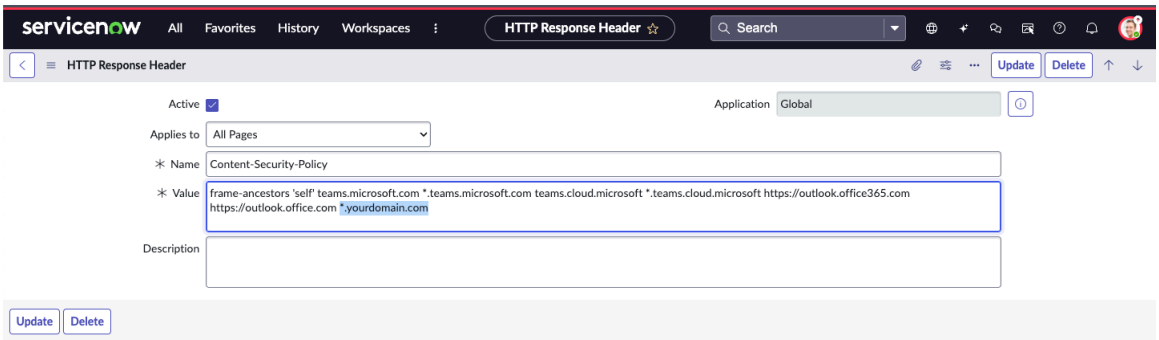
Role required: admin

Procedure

1. Set your scope to **Global** and elevate your role to **security_admin**.
2. Navigate to **All** > **HTTP Response Headers** (or type in sys_response_header.list).
3. Select the **Global** response header.
4. Add the domain name for your Epic hyperspace instance to the list of values.
   For example, *.yourdomain.com
5. Ensure that **Active** is set to true.
6. Select **Submit**.

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Result



Enable Multi-Provider SSO for your ServiceNow instance

Ensure that Multiple Provider SSO is enabled and configured correctly for Care Team Portal to authenticate with Epic Hyperspace via Hyperdrive.

Before you begin

Role required: admin

About this task

Note:
The steps that follow assume that you have Multiple Provider SSO installed on your ServiceNow instance.

Procedure

1. Set your scope to **Global**.
2. Navigate to **Multi SSO** > **Properties** and fill in the fields as follows.
   - Set **Enable multiple provider SSO** to true.
   - Set **Enable debug logging for the multiple provider SSO integration** to true.
3. Select **Save**.

Authenticate SMART on FHIR for use with the Care Team Portal in Hyperspace via Hyperdrive

Set up your FHIR app with the correct configurations to allow single sign-on for EPIC users to access the Care Team Portal inside EPIC Hyperspace via Hyperdrive.

Before you begin

Role required: admin

About this task

The following steps assume you've already created a fhir.epic.com account. Please note that it is recommended that a member of the EPIC team for the customer organization creates this FHIR app. The customer is responsible for managing and maintaining this app for their organization. For more information, see https://fhir.epic.com/Developer/Index.

Procedure

1. Log in to FHIR on EPIC.
2. Select **Build Apps**.
3. Click **Create**.
4. Provide an application name.
   For example, Care Team Portal.

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5. Under Application Audience, select Clinicians or Administrative Users.
6. Under Redirect URI, select **Add another URI**.
7. Enter your instance name.
   For example, `<instance-name>.service-now.com/navpage.do`.
8. Enter the Redirect URI to allow for patient context to be refreshed from the Care Team Portal.
   For example, `<instance-name>.service-now.com/careteam`
9. Repeat this for each test, dev, or prod instance you want to use with Care Team Portal using Add another URI.
10. Select **Save**.
11. Fill in the remaining fields as needed.
12. Click **Save & Ready for Sandbox** to enable testing.

Result
An app has been created in EPIC on FHIR that can be utilized for single sign on in Hyperspace for Care Team Portal.

Note:
Upon submitting the app, note that it can take 24 hours or more for the app to sync.

Create an Identity Provider on your ServiceNow instance for Healthcare Operations Core

Set up an Identity Provider in your ServiceNow instance to enable OIDC for Healthcare Operations Core.

Before you begin
Ensure that the com.snc.integration.sso.multi.installer plugin is installed on your instance.

Role required: admin

Procedure
1. Navigate to **All** > **Multi-Provider SSO** > **Identity Providers**.
2. Select **New**.
3. Under What kind of SSO are you trying to create, select **OpenID Connect**.
4. In the Import OpenID Connect Well-Known Configuration window, enter the following fields:
   - Name – Enter a name for your Identity Provider (for example, Epic OIDC)
   - Client ID – Input the Client ID created from your FHIR app on fhir.epic.com.
   - Well-Known Configuration IRL – Enter https://fhir.epic.com/interconnect-fhir-oauth/api/FHIR/R4/.well-known/openid-configuration.

     Note:
     Verify this value with Epic as it may be different for your environment.
5. Select **Import.**

Result
An Identity Provider has been created based on the information provided by the well-known configuration.

Configure your Identity Provider for Care Team Portal

Configure your Identity Provider to ensure successful user authentication in Care Team Portal.

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Before you begin
Role required: admin

Note:
For the following process to be successful, the following script includes need to be available in Global scope:

- **MultiSSO_OIDC_CTO**
- **OAuthUtilEpic**

If these script includes are in HCLS application scope, they must first be cloned into Global scope before proceeding.

Procedure

1. Navigate to **All** > **Multi-Provider SSO** > **Identity Providers**.
2. Select the Identity Provider you wish to configure.
3. Set the ServiceNow Homepage value to `https://<instance-name>.service-now.com/careteam`.
4. Navigate to the OIDC Provider Configuration related list and open the OIDC provider record.
5. Update the following fields:
   a. User Claim – enter **preferred_username**.
   b. User Field – select **User ID**.
6. Click **Update**.
7. In the Identity Provider, navigate to the Advanced related list.
8. Update the Single Sign-On Script field to **MultiSSO_OIDC_CTO**.
9. Ensure the **Active** field is set to true.
10. Click **Save**.
11. Navigate to the OIDC Entity related list.
12. Select the OIDC entity record.
13. In the OAuth API Script field, select **OAuthUtilEpic**.
14. Click **Update**.

Result
The Identity Provider has been configured to ensure successful user authentication for accessing Care Team Portal in Hyperspace via Hyperdrive.

Configure the integration settings in the Hyperdrive Client Test Harness for Care Team Portal

Once the Care Team Portal is configured, create a launch URL that can then be configured inside the Epic Hyperdrive Client Test Harness for testing.

Before you begin
Role required: admin

About this task
You can download the latest Hyperdrive Client Test Harness from fhir.epic.com.

About this task
Please work with your Epic team and Epic Technical Support for steps on how to configure the FDI integration within Hyperspace.

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Procedure

1. Log in to the Epic Hyperdrive Client Test Harness.
2. Select Integration Setup.
3. Under Integration Type, select **SMART on FHIR**.
4. In the URL, enter the launch URL for your Care Team Portal.
   For example, `https://<instance-name>.service-now.com/careteam?glide_sso_id=<identity-provider-sysid>`.
5. In Client ID, enter the production or non-production client ID as appropriate from the FHIR app built on fhir.epic.com.
6. Set your desired launch type.
7. In the launch context, add any tokens you want to capture:
   For example:
   - Key - sysparm_workstation_id
   - %WORKSTATIONID%

   For more information on capturing token data in record producer variables, see Update variables in record producers to capture tokenized data from Epic Hyperspace.
8. Select **Turn Test Integration On**.

Result

The Care Team Portal has been configured to launch with the Epic Hyperdrive Client Test Harness.

What to do next

To test the Care Team Portal integration, select Patient Chart > Trigger No Patient Context. The Care Team Portal should launch based on your chosen launch type and automatically log you in.

Note:
Your Epic login ID must match your ServiceNow user ID for the authentication to work.

Navigate the Care Team Portal

Use the Care Team Portal to create and track service requests, manage your teams, and review knowledge base articles.

- Track requests in the Care Team Portal

  Track requests created by you or your team from directly within the Care Team Portal.
- Manage your teams in the Care Team Portal

  Manage your teams from directly within the Care Team Portal.
- View knowledge articles in the Care Team Portal

  Review knowledge articles posted by your organization from directly within the Care Team Portal.
- Create requests in the Care Team Portal

  Use the Care Team Portal to create support requests for services from ancillary departments.

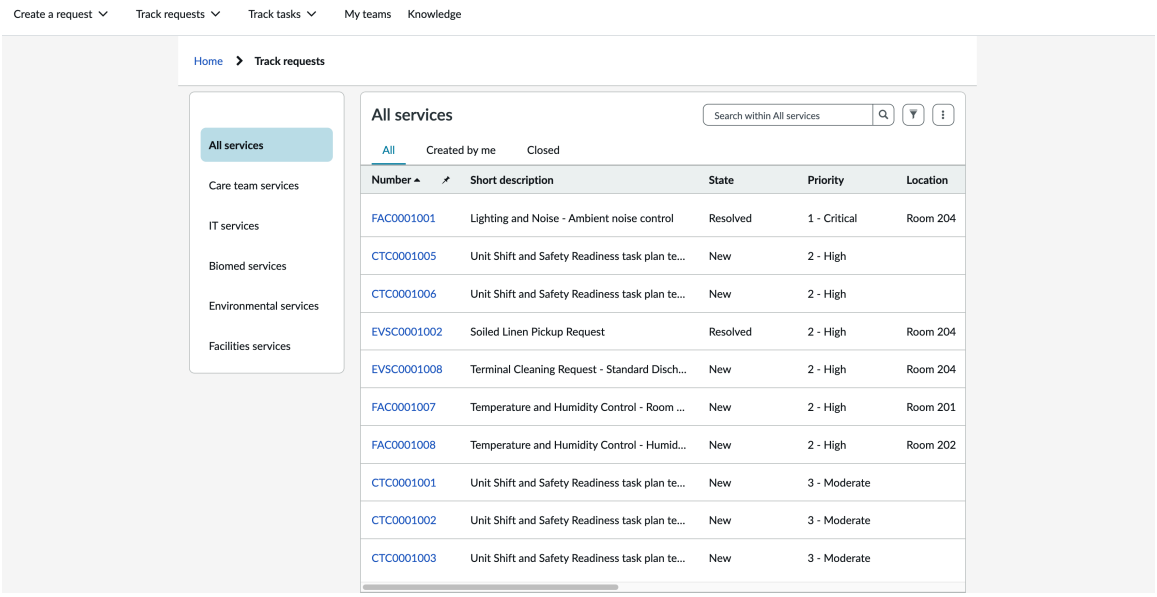
Track requests in the Care Team Portal

Track requests created by you or your team from directly within the Care Team Portal.

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Before you begin

Role required: sn_hco.care_team_member or sn_hco.care_team_manager



Procedure

1. In the Care Team Portal, navigate to **Track a request** > **All services** from the menu bar, or select the **Track requests** from the quick links widget on the landing page.
2. View requests as they display in the following tabs:
   - **All** - All service requests created for that category.
   - **Created by me** - All service requests created by you for that category.
   - **Closed** - All closed requests.

   Use the lefthand navigation bar to view requests by service type.

   Use the search function within a category to look for a specific request.

   Select the filter icon to filter all requests to those created within the last one, three, six, or 12 months.
3. Select the request number of a request to see more information about that request as needed.

Manage your teams in the Care Team Portal

Manage your teams from directly within the Care Team Portal.

- View your teams using the Care Team Portal

  View your teams from directly within the Care Team Portal.
- Add a team member using the Care Team Portal

  Add a member to your team using the Care Team Portal.
- Remove a member using the Care Team Portal

  Remove a member from your team directly within the Care Team Portal.

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View your teams using the Care Team Portal

View your teams from directly within the Care Team Portal.

Before you begin

Role required: sn_hco.care_team_member or sn_hco.care_team_manager

Procedure

1. In the Care Team Portal, navigate to **My teams** > **My teams**.
2. Select the team that you want to view.

Add a team member using the Care Team Portal

Add a member to your team using the Care Team Portal.

Before you begin

Role required: sn_hco.care_team_member or sn_hco.care_team_manager

Procedure

1. In the Care Team Portal, navigate to **My teams** > **Add a member**.
2. Select the team to which you want to add a member.
3. Fill in the following fields.

Field	Description
Name	Name of the member being added to the healthcare organization.
Title	The members title or job role.
Mobile Phone	The member's mobile phone number.
Email	The member's email address.
Business Phone	The business phone number.
Responsibility	The responsibility associated with this member.There are two options: ○ Team member - Can raise cases. ○ Team manager - Can raise cases and add or remove members within organizations.

4. Select **Submit**.

Remove a member using the Care Team Portal

Remove a member from your team directly within the Care Team Portal.

Before you begin

Role required: sn_hco.care_team_manager

Procedure

1. In the Care Team Portal, navigate to **My teams** > **Remove a member**.
2. Fill in the following fields:

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Field	Description
Team	The team from which the team member should be removed.
Name	Name of the team member being removed.
Title	The team member's title or job role.
Email	The team member's email address.
Business Phone	The team member's business phone number.
Mobile Phone	The team member's mobile phone number.

3. Select **Submit**.

Result
The team member is removed from the designated care team.

View knowledge articles in the Care Team Portal

Review knowledge articles posted by your organization from directly within the Care Team Portal.

Before you begin
Role required: sn_hco.care_team_member or sn_hco.care_team_manager

Procedure
1. In the Care Team Portal, navigate to **Knowledge**.
2. Use Search to look up an article, or select one from the KB Top Rated or KB Most Viewed widgets.

Create requests in the Care Team Portal

Use the Care Team Portal to create support requests for services from ancillary departments.

Before you begin
Role required: sn_hco.care_team_member or sn_hco.care_team_manager

About this task
Use the Care Team Portal, part of Healthcare Operations Core, to create support requests for ancillary departments. You can also leverage the Healthcare Operations Core case type to create your own record producers. For detailed instructions, refer to Configuring Healthcare Operations Core.

If you have the Care Team Operations for Healthcare IT or Care Team Operations for Biomed plugins installed, the Care Team Portal includes pre-installed record producers. These plugins can be used to create preconfigured requests. For more information, see Care Team Operations for Healthcare IT and Care Team Operations for Biomed.

Procedure
1. In the Care Team Portal, navigate to **Create a request**.
2. Select the type of request that you want to create.
3. Fill in details as needed and submit your request.

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Result
Your request is created and routed to the supporting department for fulfillment.

Healthcare Operations Core Reference

Reference topics provide additional information about Care Team Operations components, including tables.

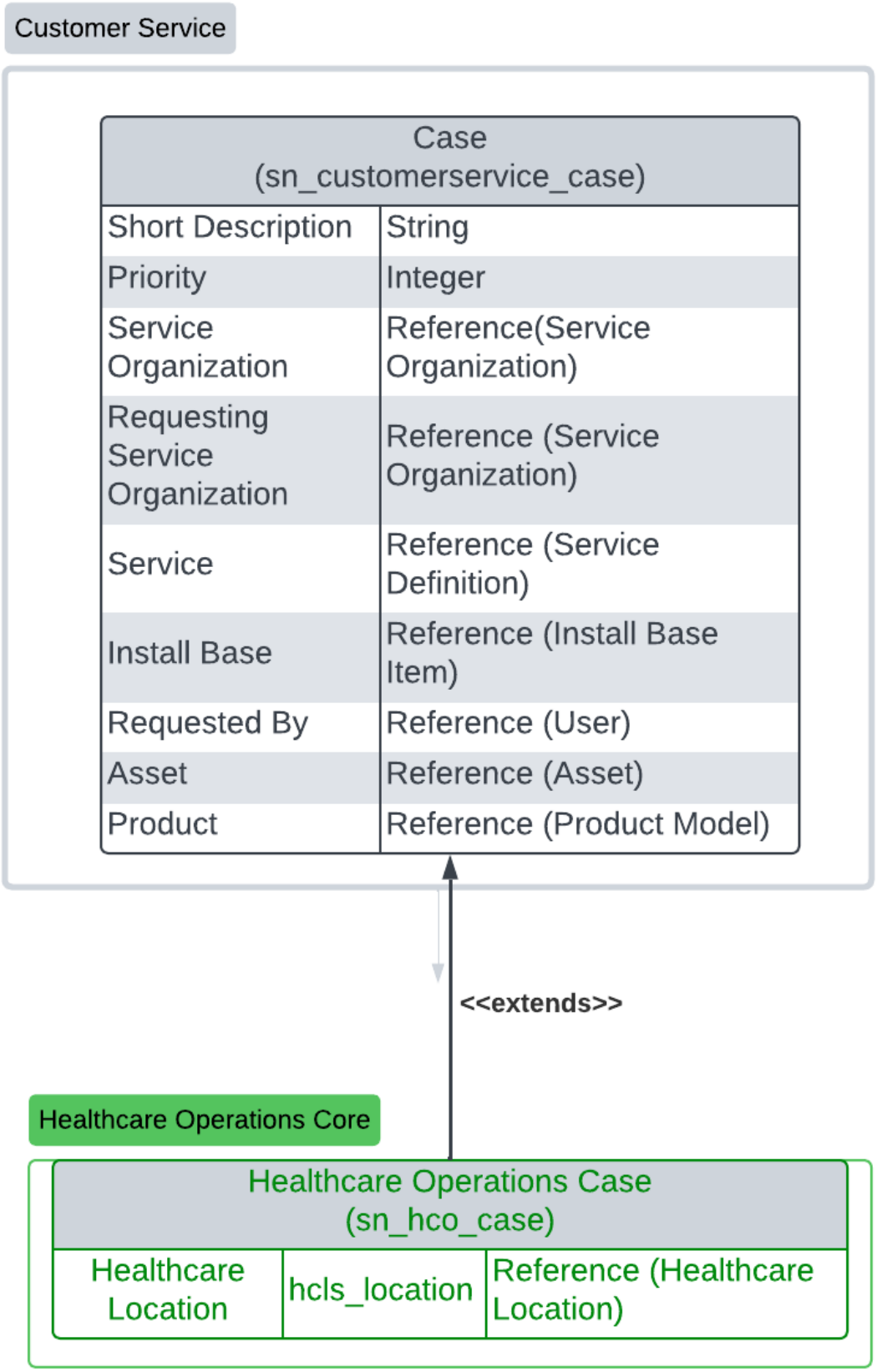
Healthcare Operations Core data model

Learn about the Healthcare Operation Core application by viewing the data model and role relationship diagrams.

These diagrams show the relationships between the tables within the application and provide an overall picture of how the Healthcare Operations Core application operates.

The following diagram shows the tables and their relationships within the Healthcare Operations Core application:

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Tables installed with Healthcare Operations Core

The Healthcare Operations Core Case enables streamlined support for operational healthcare use cases.

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It 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.

It includes the Healthcare Location field, which references the Healthcare Location table in the Healthcare and Life Sciences data model.

Components installed with Healthcare Operations Core

Several types of components such as tables, user roles, and business rules are installed when you activate the Care Team Operations plugin.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see https://www.servicenow.com/docs/bundle/yokohama-platform-administration/page/administer/plugins/task/find-components.html.

Tables installed with Healthcare Operations Core

Table name	Description
Healthcare Operations Core case (hco_case)	Abstract case type that provides a foundation to extend from when building your own operational request types.

Base roles installed with Healthcare Operations Core

Role	Contains	Description
Admin sn_hco.admin	• sn_csm_agent • sn_service_org.writer • sn_bus_loc.ibl_writer • sn_csm_case_types.service_definition_admin • sn_hcls.foundation_data_writer	This is the administrator role for Healthcare Operations Core.
Team Member sn_hco.care_team_member	• sn_customerservice.service_organization_contributor • sn_hcls.foundation_data_viewer	This role has access to create and view HCO cases and can add members to the care unit.
Team Manager sn_hco.care_team_manager	• sn_hco.care_team_member • sn_customerservice.svc_location_manager_contributor	This role can view HCO cases and HCLS foundation data.
Viewer sn_hco.viewer	sn_hcls.foundation_data_viewer	This role can view HCO cases

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		and HCLS foundation data.
Support Agent sn_hco.loc_support_agent	sn_bus_loc.svc_location_support_agent	This role can view, track, resolve, and fulfill all cases under their assignment group.

Plugins installed with Healthcare Operations Core

Plugin name	Description
Care Team Portal (com.sn_cto_sp)	Provides a portal experience for Healthcare Operations Core users to create requests for supporting departments, manage teams, and gain visibility into submitted requests.
Healthcare and Life Sciences Service Management Core (sn_hcls)	Provides the Healthcare and Life Sciences data model for Healthcare and Life Sciences industry products.

Business rules installed with Healthcare Operations Core

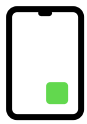
Business rules name	Description
HCLS Org Loc Association duplicate check	Ensures that Healthcare locations are associated with healthcare organizations only once
Set HCLS location from CMN location	Sets the corresponding Healthcare location of selected cmn_location.

Care Team Mobile

Care Team Mobile enables care teams to create and view shared support requests for IT, Biomed, Facilities, and Environmental Services departments while on the go.

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Get started

Explore	Configure	Request
		
Learn about how care teams use Care Team Mobile to create and track support requests.	Activate and set up your application.	Create and track support requests for supporting departments.

Exploring Care Team Mobile

Discover how to use the Care Team Mobile application to create requests for care team support departments from the convenience of your mobile device.

Care Team Mobile overview

The Care Team Mobile application is designed to streamline the reporting and tracking of operational issues for care team members. Care Team Mobile enhances efficiency by enabling care team members to report and track the status of any case directly from their smart phones or tablets. This application saves time on operational work management that they can then redirect to patient care.

Care Team Mobile includes the following features:

- Asset tag scanning enables you to scan tags on medical equipment and be redirected to the asset's record, where they can view its history, status, and associated requests.
- Browse locations to view healthcare location information and create support requests for specific locations as needed.
- Secure mobile access through identity management solutions supports both hospital-provided and personal devices.

Care Team Mobile requires Healthcare Operations Core and can be used with the following Care Team Operations plugins:

- Care Team Operations for Healthcare IT
- Care Team Operations for Biomed
- Care Team Operations for Facilities
- Care Team Operations for Environmental Services

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Care Team Mobile users

Users

User	Description
Registered Nurse	Registered nurses are responsible for providing and coordinating patient care, administering medications and treatments, and collaborating with other healthcare professionals to develop and implement care plans. They use Care Team Mobile to create and track support requests for ancillary departments.
Nurse assistant	Nurse assistants provide basic care to patients in healthcare facilities, assisting with daily living, monitoring patient health, and providing vital support to nurses and medical staff. They use Care Team Mobile to create and track support requests for ancillary departments.
Unit Secretary	Unit secretaries provide administrative support to nursing units and facilitate communication between staff, patients, and families while maintaining patient records. They use Care Team Mobile to create and track support requests for ancillary departments.

Care Team Mobile workflow

1. An administrator installs Care Team Mobile on the care team's mobile devices alongside all relevant Care Team Operations applications.
2. A nurse notices that a room needs a linen change and creates a request for the Environmental Services department using Care Team Mobile with the Care Team for Environmental Services plugin installed.
3. A support agent from the Environmental Services department receives the request and proceeds to change the linens in the room. The support agent then marks the request as Complete using FSM Mobile or CSM/FSM Configurable Workspace.
4. The nurse who created the request receives an alert that the linen change request was fulfilled and then accepts the solution.

Care Team Mobile benefits

Benefit	Feature	Users
Create support requests based on installed Healthcare Operations case types directly from your mobile device.	Create support requests using Care Team Mobile	Nurse, Nurse Assistant, Unit Secretary
Scan tags on medical equipment and be redirected to the asset's record, where you can view its history, status, and associated cases.	Asset Scan in Care Team Mobile	Nurse, Nurse Assistant, Unit Secretary
View requests for specific locations, such as patient rooms or supply closets, and access relevant details and preconfigured workflows	Browse locations in Care Team Mobile	Nurse, Nurse Assistant, Unit Secretary

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Benefit	Feature	Users
for reporting issues like sanitation requests or facility repairs.		

What to explore next

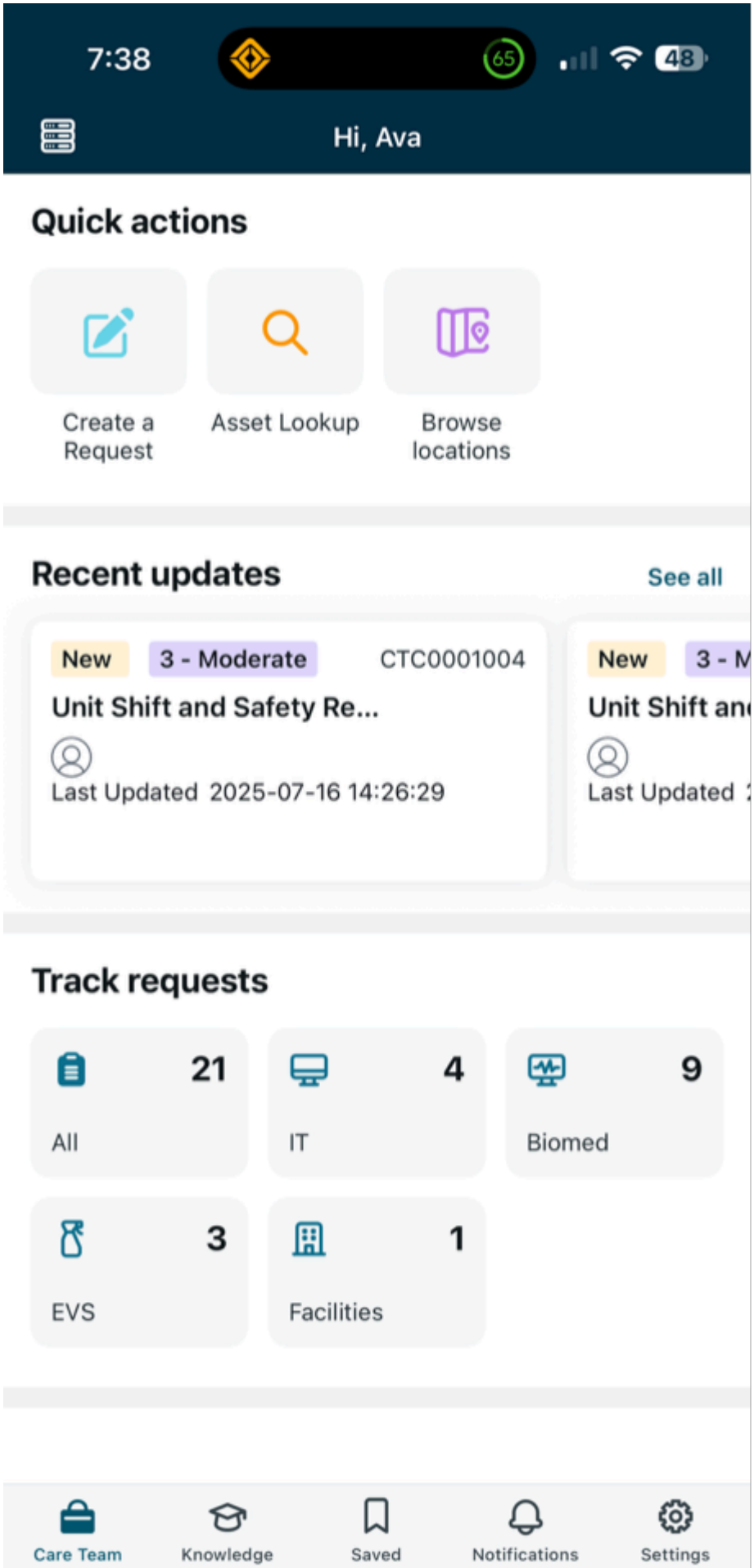
To learn more about configuring and using Care Team Mobile, see:

- Configure Care Team Mobile
- Create support requests using Care Team Mobile

Care Team Mobile overview

The Care Team Mobile landing page offers users a list of quick actions, recent updates on requests, and request tracking information.

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Quick actions

The following quick actions are available directly from the Care Team landing page:

- **Create a request**: Enables care team users to generate a support request for supporting departments.
- **Scan asset**: Enables care team users to scan a QR code then generate a request with information about the associated medical device.
- **Browse locations**: Helps care team users find and select healthcare locations they're associated with to create requests specific to those locations.

Recent updates

Recent updates displays all active requests related to you or your team. The most recently updated request displays first.

Track requests

Track requests displays all requests associated with the user or their team organized by request type.

Knowledge

Knowledge displays relevant knowledge articles.

Saved

Saved displays all bookmarked requests for tracking purposes.

Notifications

Notifications displays all notifications for the current user.

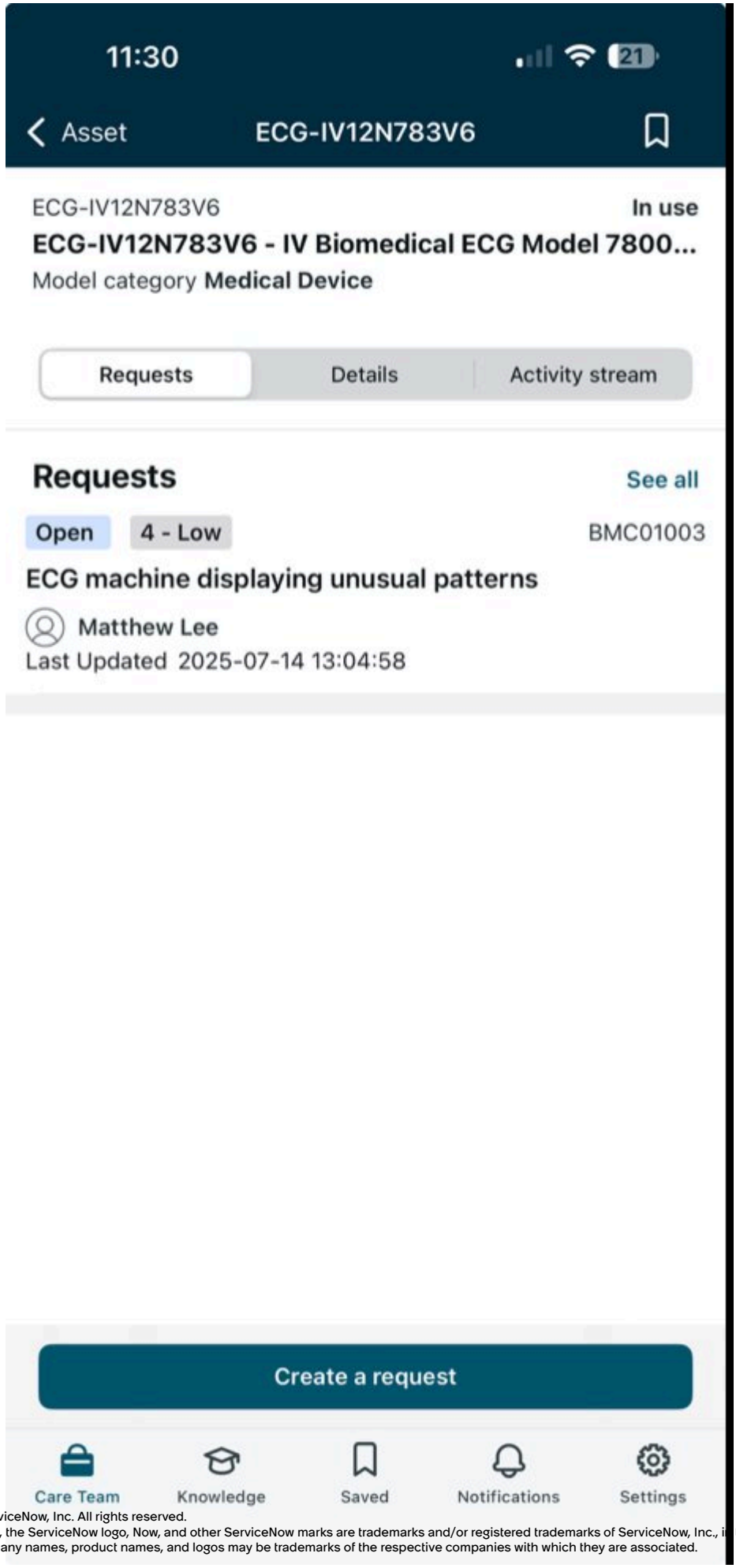
Settings

Settings displays all setting configurations for the Care Team Mobile user experience.

Asset Scan in Care Team Mobile

Scan tags on medical equipment and be redirected to the asset's record, where you can view its history, status, and associated cases.

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Select Scan asset from within the quick actions menu to open Asset lookup.

Once opened, scan an asset to retrieve the asset tag.

After searching for the Asset tag, you can create a request.

If no asset is found, a notification is displayed.

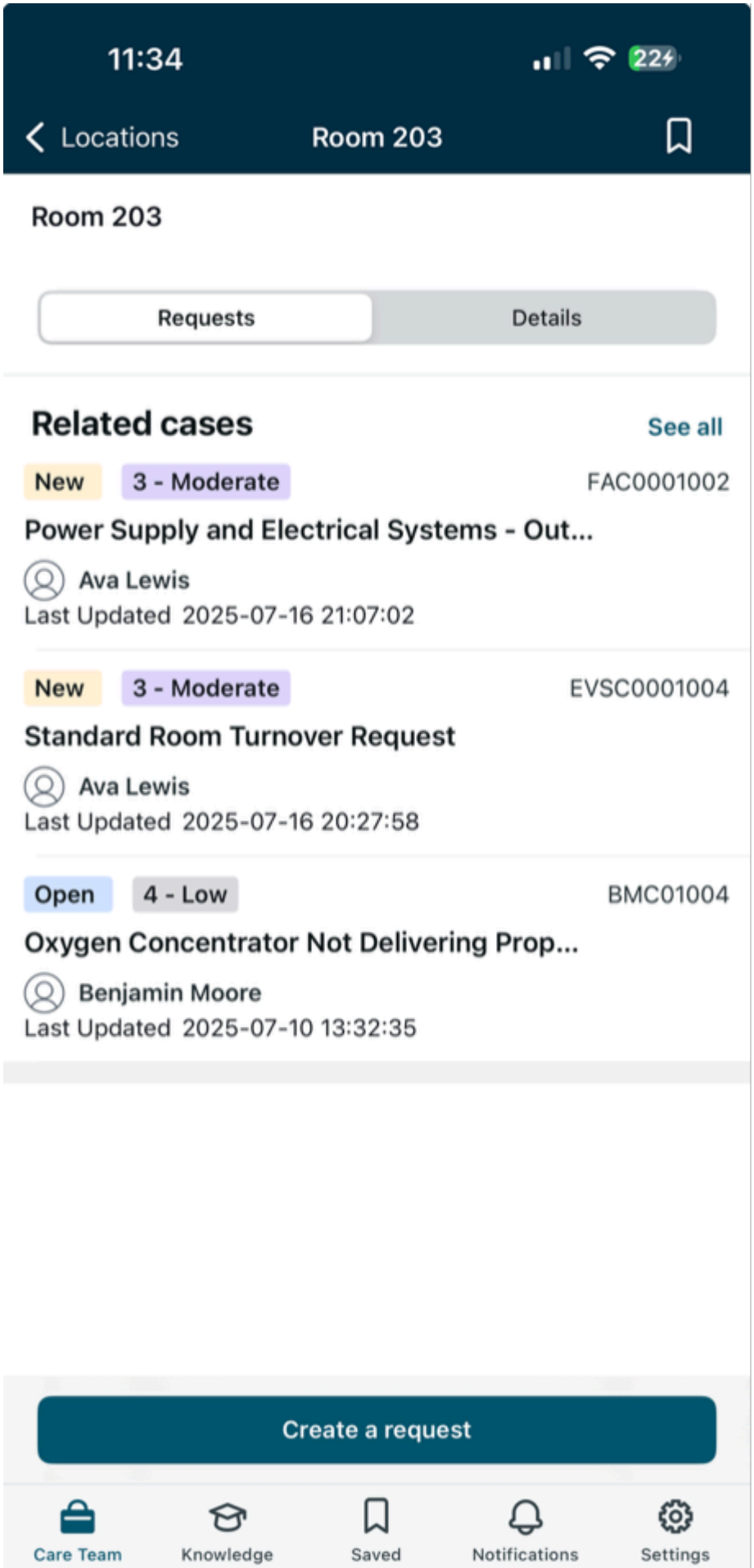
Note:
When you view a healthcare location, they should be able to select the **Assets** segment. This displays the list of assets associated with the common location that is itself associated with the healthcare location they're viewing. For information on how healthcare locations are set up, see Setting up healthcare locations and healthcare organizations.

For more detailed information on scanning an asset to create a support request, see Scan an asset to create a support request in Care Team Mobile.

Browse locations in Care Team Mobile

Browse locations in Care Team Mobile to view healthcare locations and create support requests for specific locations as needed.

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You can browse locations using **Browse locations** from the Quick actions menu.

After selecting **Browse locations**, a list of all associated teams is then displayed.

Selecting into a team displays a detailed location hierarchy associated with that team.

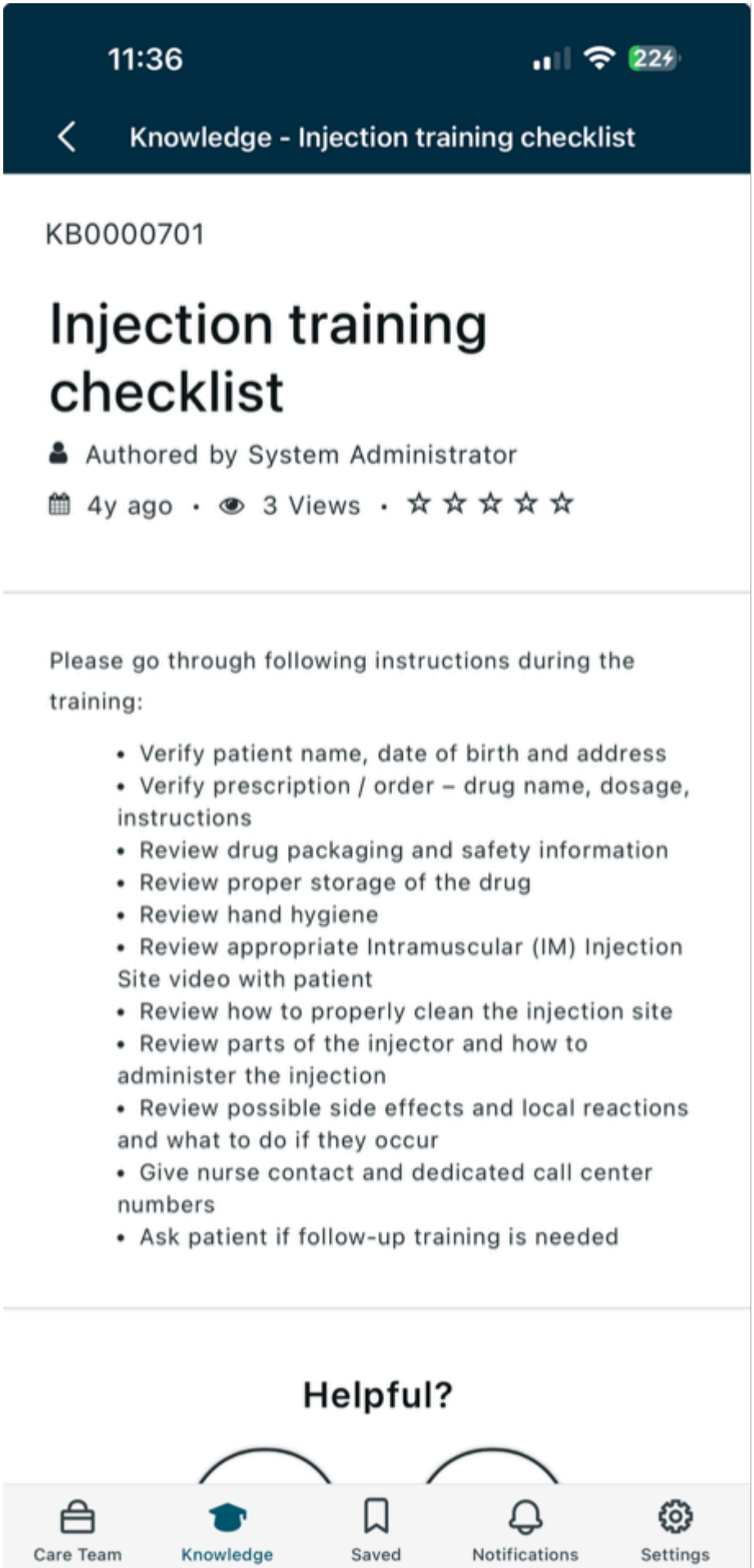
You can select a location to view more detailed information about that location then optionally create a request for that location.

For more information about creating requests using **Browse locations**, see Browse locations to create a support request in Care Team Mobile.

Knowledge articles in Care Team Mobile

Browse and view relevant knowledge articles directly within Care Team Mobile.

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Select **Articles** to view knowledge articles organized by categories.

Recently viewed articles displays the knowledge articles most recently viewed by you.

Configure Care Team Mobile

Set up the Care Team Mobile application.

Configuration overview

1. Activate Care Team Mobile

   Activate the Care Team Mobile plugin [com.sn_cto_mobile] if you have the admin role. This plugin includes demo data and activates related plugins if they aren't already active.

2. Assign roles for Care Team Mobile users

   User access for Care Team Mobile is based on whether users have been assigned the Team Member or Team Manager role.

3. Enable Push Notifications for Care Team Mobile

   Push notifications for Care Team Mobile must be enabled manually.

Activate Care Team Mobile

Activate the Care Team Mobile plugin [com.sn_cto_mobile] if you have the admin role. This plugin includes demo data and activates related plugins if they aren't already active.

Before you begin

Role required: admin

The following plugins are activated with Care Team Mobile:

- com.sn_mab
- sn_mab_api

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the [com.cto_mobile] plugin using the filter criteria and search bar.
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 Care Team Mobile users

User access for Care Team Mobile is granted when you have been assigned the **sn_hco.care_team_member** role.

Roles for Care Team Mobile are assigned just as they are for the Healthcare Operations Core application.

For instructions on assigning these roles, see Setting up roles and responsibilities for Healthcare Operations users.

Enable Push Notifications for Care Team Mobile

Push notifications for Care Team Mobile must be enabled manually.

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Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Push Application**.
2. Select the **ServiceNow Mobile Application** record.
3. Navigate to the **Push Default Registrations** related list and select **New**.
4. Add the case type that you want push notifications enabled for.
   - **Care Team Mobile HCIT Notifications**
   - **Care Team Mobile Biomed Notifications**
   - **Care Team Mobile EVS Notifications**
   - **Care Team Mobile Facilities Notifications**

   Note:
   Repeat this step for other case types as needed.
5. Select **Submit**.

Result
Push notifications are enabled in Care Team Mobile for all specified case types.

Create support requests using Care Team Mobile

Use Care Team Mobile to create requests for supporting departments directly from your mobile device.

The following plugins are supported by Care Team Mobile:

- Care Team Operations for Healthcare IT
- Care Team Operations for Biomed
- Care Team Operations for Facilities
- Care Team Operations for Environmental Services

- Create a support request in Care Team Mobile

  Use Create a request in Care Team Mobile to create support requests directly from your mobile device.

- Track a submitted request in Care Team Mobile

  Use Track requests in Care Team Mobile to track all requests submitted by you or your team.

- Cancel a submitted request in Care Team Mobile

  Cancel a submitted request in Care Team Mobile by locating the request and selecting Cancel case from the action menu.

- Scan an asset to create a support request in Care Team Mobile

  Use Scan asset in Care Team Mobile to generate support requests by scanning bar codes attached to assets.

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- Browse locations to create a support request in Care Team Mobile

  Use Browse locations in Care Team Mobile to browse and create support requests for specific locations.

Create a support request in Care Team Mobile

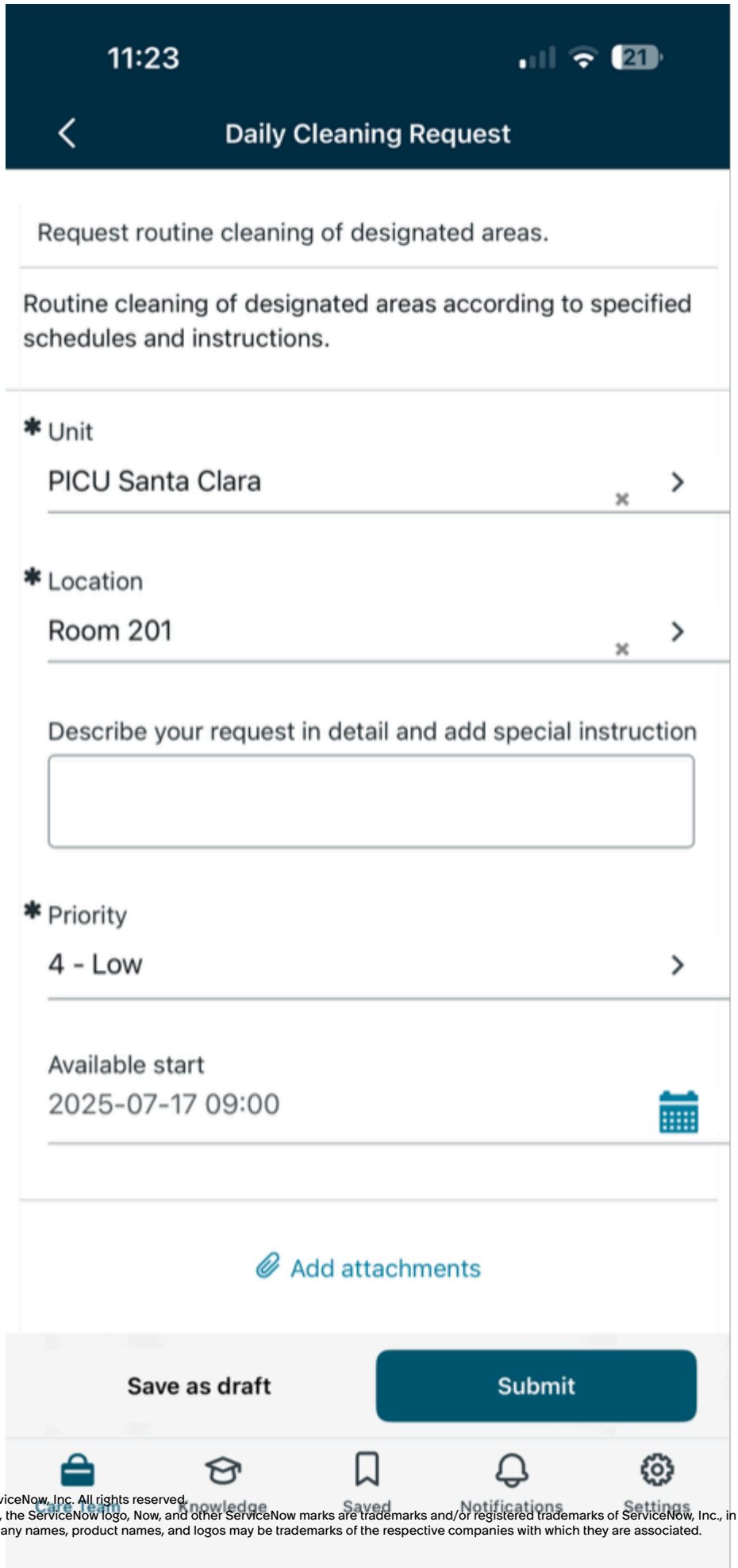
Use **Create a request** in Care Team Mobile to create a support request directly from your mobile device.

Before you begin

Role required: Team member, Team manager

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Procedure

1. In Care Team Mobile, navigate to **Quick actions** > **Create a request**.
2. Select the category of request that you want to create.
   For example, **Environmental service request**.
3. Select the type of request that you want to create.

   For example, **Housekeeping and Sanitation Services** > **Linen and Laundry Services**.
4. Fill in the fields as needed.
5. Select **Submit**.
6. **Optional:** Select **Save as draft** to save the information within the request without submitting it.

Result
A service request has been created and routed to the associated supporting services department for fulfillment.

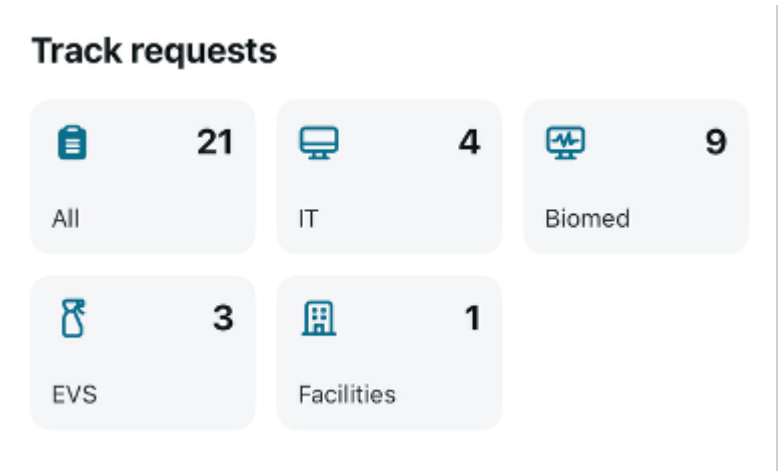
What to do next
Track a submitted request in Care Team Mobile or Cancel a submitted request in Care Team Mobile.

Track a submitted request in Care Team Mobile

Use **Track requests** in Care Team Mobile to track all requests submitted by you or your team.

Before you begin
Role required: Team member, Team manager

About this task



Procedure

1. In Care Team Mobile, navigate to the **Track requests** section on the landing page.
2. Select the type of request that you want to track, or select **All** to display all requests.
3. View all submitted requests organized as follows:
   - **All active** - Displays all open requests created by either yourself or your team.
   - **By me** - Displays all open requests created by you.
   - **All inactive** - Displays all completed or canceled requests.

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4. **Optional:** Select **Filters** to filter or sort all requests based on conditions you specify.
5. Select a request to view its details.

Cancel a submitted request in Care Team Mobile

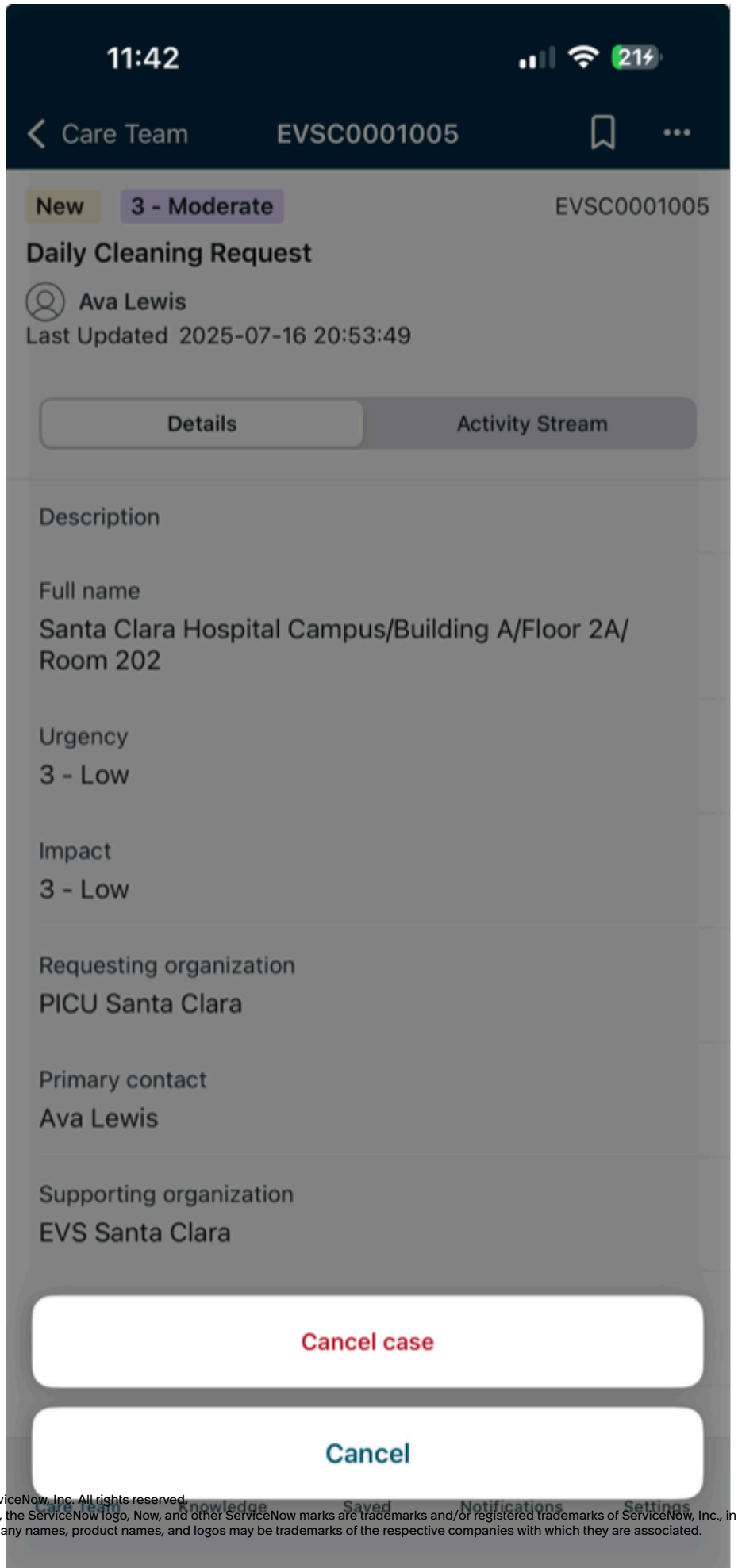
To cancel a submitted request in Care Team Mobile, simply locate the request and select **Cancel case** from the action menu.

Before you begin

Role required: Team member, Team manager

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Procedure

1. In Care Team Mobile, navigate to **Track requests**.
2. Select the submitted request that you want to cancel.
3. Select **Cancel case** from the Actions menu on the upper righthand corner of the screen.

Result

The specified request has been canceled.

Scan an asset to create a support request in Care Team Mobile

Use **Scan asset** in Care Team Mobile to generate support requests by scanning bar codes attached to assets.

Before you begin

Role required: Team member, Team manager

Procedure

1. In Care Team Mobile, navigate to **Quick Actions** > **Scan asset**.
2. Scan the bar code attached to the asset to retrieve the asset tag.
3. Select **Submit**.

   If no existing asset is found, a message is displayed to alert the user that no existing asset exists.

4. Select the returned asset record.
   Any active requests, details, or activities associated with the asset are displayed.
5. **Optional:** Select **Create a request** to create a support request for this asset.

Browse locations to create a support request in Care Team Mobile

Use **Browse locations** in Care Team Mobile to browse and create support requests for specific locations.

Before you begin

Role required: Team member, Team manager

Procedure

1. In Care Team Mobile, navigate to **Browse locations**.
2. View all locations associated with your team.
3. **Optional:** Select **Filters** to filter by team name and sort locations alphabetically or by name.
4. Select a location to view more details about that location.
5. Select **Assets** to display the list of assets associated with the location you are viewing.
6. **Optional:** Select **Create a request** to create a support request for this location.
   The location information will automatically populate into the request.

Care Team Operations for Biomed

Care Team Operations for Biomed contains the case types to report and fulfill biomed issues.

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Get started

Explore  Learn about how care teams use Care Team Operations for Biomed.	Configure  Plan and configure your implementation.	Request  Create operational support requests for your Healthcare Biomed department.
Resolve  Resolve support requests in the form of cases of work orders.	Reference  Get details about components like fields, tables, and properties.	

Troubleshoot and get help

- Ask questions and explore other resources for in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Care Team Operations for Biomed

Learn how you can use the Care Team Operations for Biomed application to support your care team in resolving biomed issues quickly and efficiently.

Care Team Operations for Biomed overview

Care Team Operations for Biomed contains the case types to report and fulfill biomed issues in hospitals.

Care Team Operations for Biomed provides care teams with a streamlined platform to report medical device or other biomed issues. Using the Care Team portal, care team members can raise an issue with the Biomed case type. A work order is then automatically created, which service agents in the Biomed department then manage using Workspace as they fix the issue.

There are two types of service requests available with Care Team Operations for Biomed:

- Report a medical device issue
- Request other Biomed service

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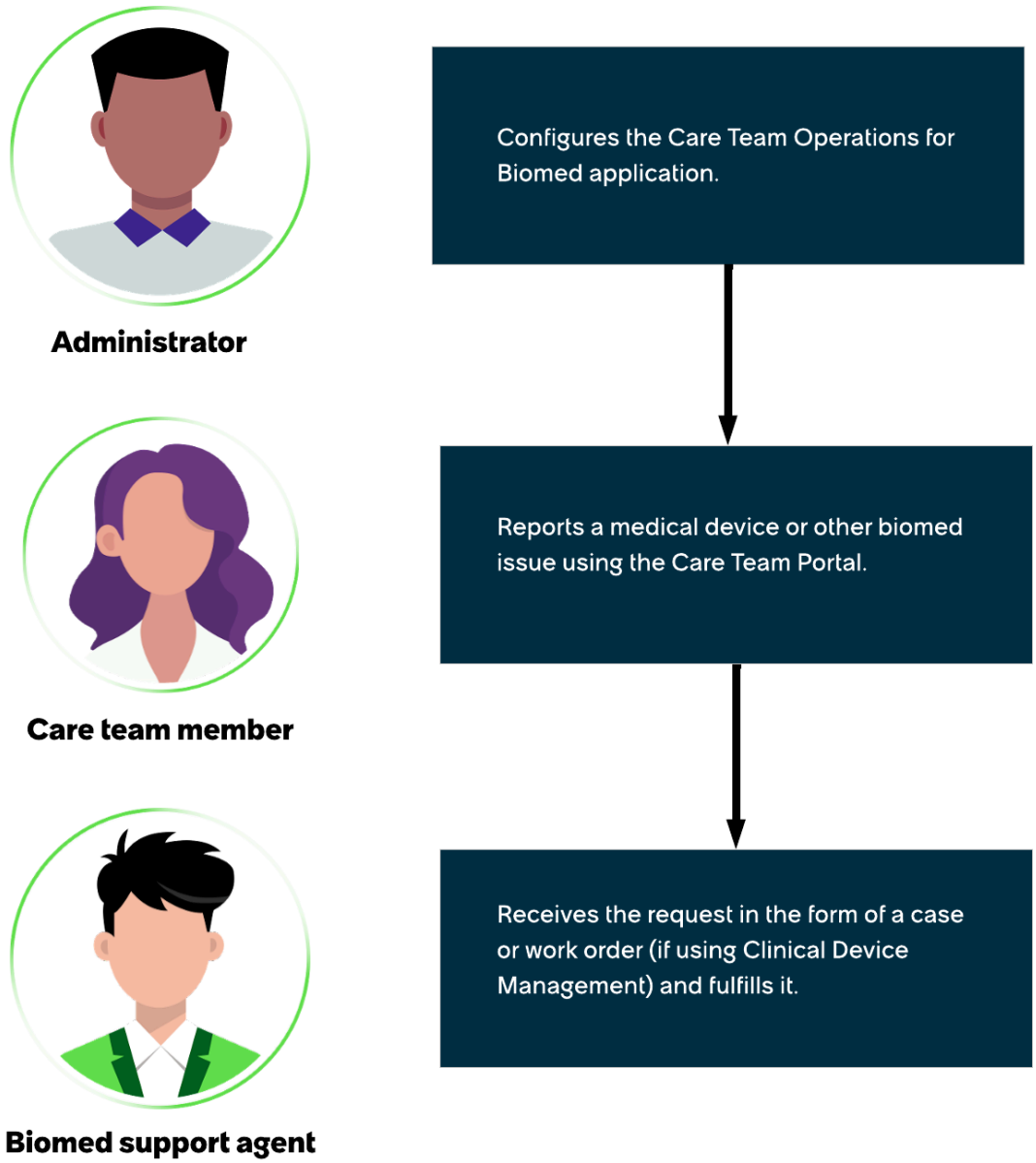
Note:
Care Team Operations for Biomed requires installation of the Healthcare Operations Core and Care Team Portal plugins.

Care Team Operations for Biomed users

User	Description
Nurse assistant	Nurse assistants provide basic care to patients in healthcare facilities, assisting with daily living, monitoring patient health, and providing vital support to nurses and medical staff.
Registered Nurse	Registered nurses are responsible for providing and coordinating patient care, educating patients and their families about various health concerns, administering medications and treatments, and collaborating with other healthcare professionals to develop and implement care plans.
Unit Manager	Unit Managers oversee the operations of a specific unit within a healthcare facility, supervise staff, manage resources, and ensure the delivery of high-quality patient care.
Unit Secretary	Unit secretaries provide administrative support to nursing units and facilitate communication between staff, patients, and families while maintaining patient records.
Biomed Agent	Biomed agents create, view, edit, and fulfill service requests created by the care team on behalf of the hospital's Biomed department.
Biomed Agent Manager	Biomed Agent Managers oversee the Biomed department agents and ensure that requests are fulfilled in an effective and timely manner.

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Care Team Operations for Biomed workflow



1. An administrator configures the Care Team Operations for Biomed application.
2. A care team member reports a medical device or other biomed issue and reports it using the Care Team Portal.
3. A biomed support agent receives the request in the form of a work order (if using Clinical Device Management) and fulfills it using Workspace.

Care Team Operations for Biomed benefits

Benefit	Feature	Users
Automate healthcare operations by enabling biomed support request creation and fulfillment.	Healthcare Biomed case overview	Admin

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Benefit	Feature	Users
Receive visibility into all biomed requests created by your team.	Creating service requests in Care Team Operations for Biomed	Care Team
Use Workspace to fulfill biomed service requests.	Fulfilling service requests in Care Team Operations for Biomed	Agent

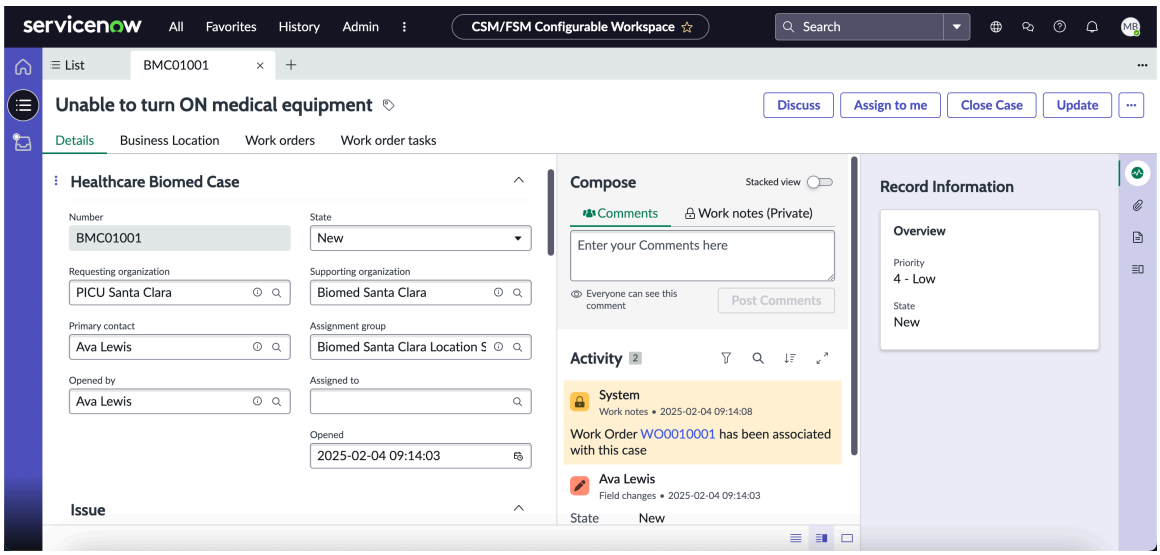
What to explore next

To learn more about configuring and using Care Team Operations for Biomed, see:

- Configuring Care Team Operations for Biomed
- Creating service requests in Care Team Operations for Biomed
- Fulfilling service requests in Care Team Operations for Biomed
- Care Team Operations for Biomed Reference

Healthcare Biomed case overview

Use the Healthcare Biomed case to create case types for biomed related healthcare operational requests.



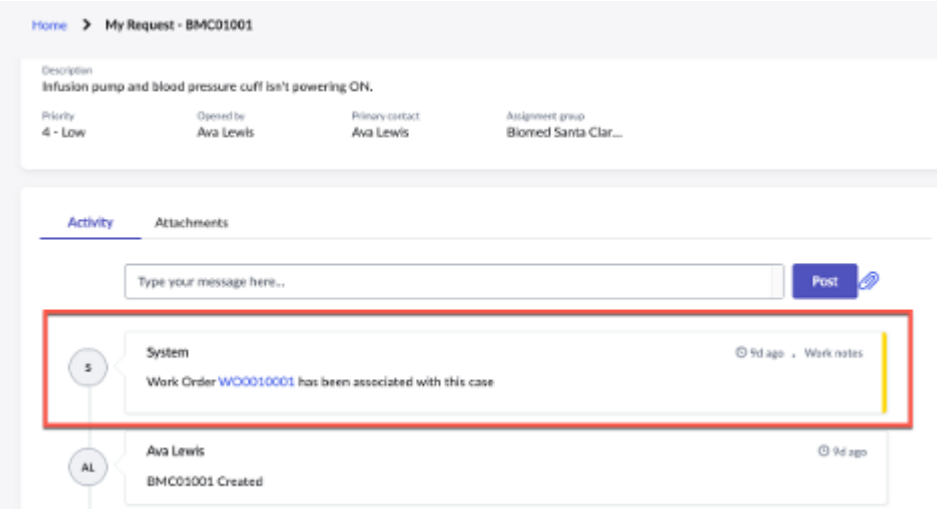
If the Field Service Management [com.snc.work_management] plugin is installed, Healthcare Biomed cases automatically generate related work orders which are assigned to supporting agents with the fulfiller role. If this plugin isn't installed, support agents must fulfill the case itself.

By associating these cases with specific healthcare organizations, care team members can easily view all cases created for their team, unit, or organization.

Any updates, comments, or status changes made to the work order reflect in the case, and vice versa. When a work order is linked to a case, the fulfiller only manages the work order, and the case is then updated to reflect these changes.

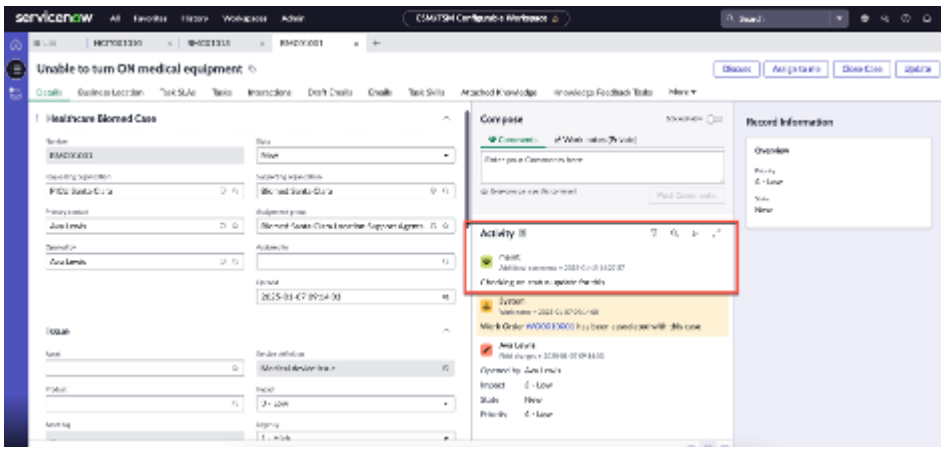
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Work order auto-creation



Work orders are created automatically in synchronization with Healthcare Biomed cases. All information from the Healthcare biomed case is carried over into the work order.

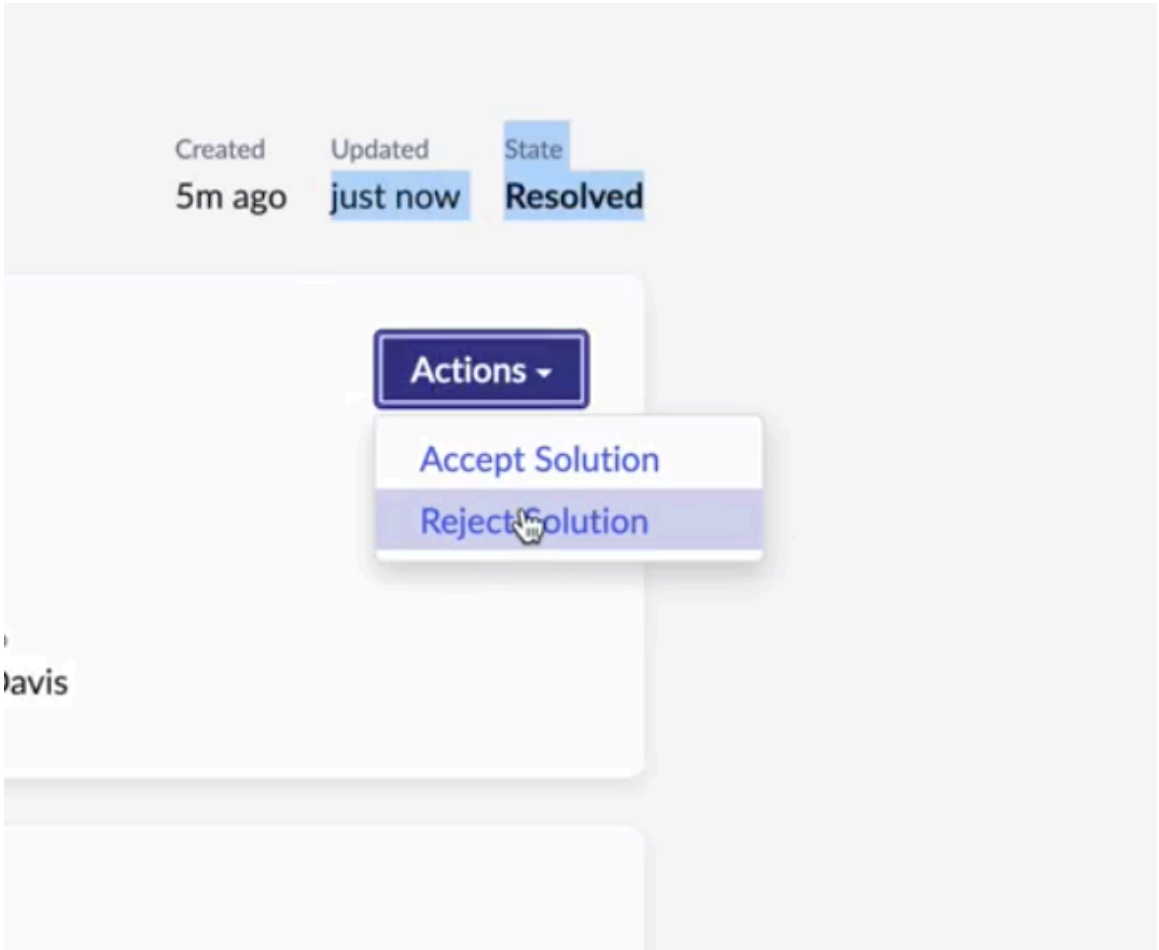
Comment synchronization



Comments on the Healthcare Biomed case are viewable on the work order, and comments in the Compose panel of the work order are viewable on the Healthcare Biomed case.

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State synchronization



The state of both the work order and the healthcare case remains in synchronization throughout the entire fulfillment process. Use the Care Team Portal to track your case state in real time through viewing case details in the portal.

Note:
In Care Team Operations for Biomed, case data only synchronizes with work orders and does not synchronize with work order tasks. Only updates made to the work order affects the associated case data.

Configuring Care Team Operations for Biomed

The following setup steps need to occur prior to using Care Team Operations for Biomed.

Configuration overview

1. Install Care Team Operations for Biomed

   Install the Care Team Operations for Biomed application (sn_cto_biomed) if you have the admin role.

2. Set up work order synchronization in Care Team Operations for Biomed

   The Field Service Management [com.snc.work_management] plugin is required for work order synchronization to function with Care Team Operations for Biomed.

   For Care Team Operations for Biomed to create work orders from Healthcare Biomed cases, the Field Service Management [com.snc.work_management] plugin must be installed.

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3. Assign roles for Care Team Operations for Biomed

   Ensure that the correct roles are assigned to users of Care Team Operations for Biomed.

4. Create healthcare organizations for your biomed support teams

   Create a healthcare organization to represent the fulfilling healthcare organization for healthcare biomed cases.

5. Create a group for all location support agents in Care Team Operations for Biomed

   Create a group for location support agents with the sn_cto_biomed.loc_support_agent assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Biomed.

6. Create a group for all location managers in Care Team Operations for Biomed

   Create a group for location managers with the sn_customerservice.svc_location_manager assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Biomed.

7. Set up assignment groups for Care Team Operations for Biomed

   Associate assignment groups with your healthcare organizations to determine which user groups are associated with specific healthcare organizations.

8. Modify state decision tables in Care Team Operations for Biomed

   Use Decision Builder to change the state mappings for cases and incidents work orders in Care Team Operations for Biomed#.

Install Care Team Operations for Biomed

Install the Care Team Operations for Biomed application [sn_cto_biomed] if you have the admin role.

Before you begin

Role required: admin

About this task

The application includes demo data for Care Team Operations for Biomed and installs related applications and plugins if they are not already installed.

> **Note:**
> The Care Team Operations for Biomed application is dependent on the Healthcare Operations Core application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Care Team Operations for Biomed application [sn_cto_biomed] 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.

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

Set up work order synchronization in Care Team Operations for Biomed

The Field Service Management [com.snc.work_management] plugin is required for work order synchronization to function with Care Team Operations for Biomed.

For Care Team Operations for Biomed to create work orders from Healthcare Biomed cases, the Field Service Management [com.snc.work_management] plugin must be installed.

This plugin provides all roles and features needed for the healthcare biomed case to synchronize with work orders.

For information on fulfilling work orders, see Manage work orders.

If the Field Service Management [com.snc.work_management] plugin isn't installed:

Work orders won't be created from healthcare biomed cases. Instead, agents work on fulfilling those cases directly from their portals.

Cases created are assigned to assignment groups based on the requesting location associations and are configured normally with CSM case management functionality.

Set up assignment groups for Care Team Operations for Biomed

Associate assignment groups within your healthcare biomed organizations so work orders can be fulfilled.

Before you begin

Role required: admin

About this task

In Care Team Operations for Biomed, assignment groups must be configured so that work orders created from biomed cases can be fulfilled.

Important:

The various steps of fulfilling work orders require that assignment groups be created as follows:

- **Biomed qualifier:** To set up biomed.qualifier roles, users must be assigned the Biomed Qualifier group,which contains the sn_cto_biomed.loc_support_agent role and the wm_qualifier roles.
- **Biomed dispatch:** To set up biomed dispatch roles, users must be assigned the Biomed Dispatcher group, which contains the wm_dispatcher and sn_cto_biomed.loc_support_agent roles.

> **Note:**
> In Agent assignment groups, the Covered by Dispatch Groups tab must be used to indicate which groups can fulfill for them.

For both of the above roles, the **Locations Covered** related list displays all locations these users can qualify or dispatch for.

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Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations**.
2. Select the healthcare organization you want to associate an assignment group with.
3. In the Assignment Groups related list, select **New**.
4. On the Service Organization Assignment Group form, fill in the fields.

   Service Organization Assignment Group form:

Field	Description
Service organization	Auto-populated with the name of the healthcare organization to which you're adding an assignment group.
Assignment group	Name of the assignment group that is to be added.

5. Select **Submit**.

Setting up roles and responsibilities in Care Team Operations for Biomed

To manage access effectively in Care Team Operations for Biomed, first understand how roles and responsibilities work together. These concepts build on the Service Model Foundation (SMF) but are adapted for Healthcare Operations-specific use cases.

To understand how roles and responsibilities function in Healthcare Operations, see Setting up roles and responsibilities for Healthcare Operations users.

The following roles and responsibilities are included with Care Team Operations for Biomed:

Care Team Operations for Biomed roles and responsibilities

Role	Responsibility	Description
sn_cto_biomed.loc_support_agent	Support Department Agent Inherits Location Support Agent responsibility from Service Model Foundation.	Can view/resolve all cases under their assignment group, tracks, and fulfill cases.

What to do next

1. Assign roles for Care Team Operations for Biomed
2. Assign responsibilities to Care Team Operations for Biomed users

Assign roles for Care Team Operations for Biomed

Confirm that the correct roles are assigned to users of Care Team Operations for Biomed.

Before you begin

Role required: admin

About this task

Roles control access to features, capabilities, and data in the Care Team Operations for Biomed application.

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You can assign roles to individual users or groups. When you apply roles to groups, the members of those groups inherit those roles.

Note:
User roles can be configured during the initial setup process for healthcare organizations or at any time thereafter as needed.

Roles installed with Care Team Operations for Biomed

sn_cto_biomed.loc_support_agent	Biomed support department agent	Can view/resolve all cases under their assignment group. Tracks and fulfills cases. **Note:** If view access to work orders is needed, this role can contain the wm_read role.

Example:

A user who must fulfill work orders created from the Care Team Portal using the Care Team Operations for Biomed plugin must be assigned the sn_cto_biomed.loc_support_agent role.

Procedure

1. Navigate to **All** > **User Administration** > **Users** then open a user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**.
4. Select **Save**.

Assign responsibilities to Care Team Operations for Biomed users

Assign responsibilities to users in Care Team Operations for Biomed to dictate which specific records users are authorized to view or modify.

Before you begin
Role required: admin

About this task
You can edit the responsibilities of Care Team Operations for Biomed users when adding or removing members from your healthcare organizations, or at any time as needed.

Responsibility	Role
Support Department Agent	sn_cto_biomed.loc_support_agent

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **All**.
2. Select the parent organization.
3. Navigate to the **Members** related list.
4. Select **Edit members**.
5. In **Responsibility**, select the intended responsibility for the user.

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6. Use the arrows between the **Available** and **Selected** panels to add the member.

   Note:

   If a newly added user isn't populated in the Available list, search for them manually using the lookup icon.

   On occasion, newly added members don't appear within the Selected panel due to property configurations. If this occurs, see Configure global system properties to edit members in Healthcare Operations Core.

7. Select **Save**.

Create healthcare organizations for your biomed support teams

Create a healthcare organization to represent the fulfilling healthcare organization for healthcare biomed cases.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **Hospital Departments**.
2. Select **New**.
3. In the name field, enter a name that reflects your biomed support organization. For example, Biomed Support.
4. Fill in the other fields as needed.
5. Select **Submit**.

What to do next
Assign members to your newly created healthcare biomed support organization.

Example - Set up your biomed support department Team

Explore how a biomed support department is created to which support agents and managers can later be added in Care Team Operations for Biomed.

Before you begin
Role required: admin

About this task
Armand, a ServiceNow administrator, needs to set up a department organizational team for the Biomed support team of Alectri Health Santa Clara. Doing so will allow him to add users who are biomed support agents or managers later.

Procedure

1. Navigate to **All > Healthcare Operations > Healthcare Organizations > All**.
2. Select the **Alectri Health Santa Clara**.

   This is the hospital the department is a part of.

3. Navigate to Child Organization and select **New.**
4. Enter the following fields:

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a. Name – Enter **Alectri Health Santa Clara Biomed Support**.

b. Organization type – Select **Hospital department.**

5. Fill in the other fields as needed.
6. Select **Submit**.

Result
Armand has created a support department for the Biomed team at Alectri Health Santa Clara to which members can now be added for fulfilling support requests created from Care Team Operations.

Create a group for all location support agents in Care Team Operations for Biomed

Create a group for location support agents with the sn_cto_biomed.loc_support_agent role assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Biomed.

Before you begin
Role required: admin

About this task
The location support agent role will only give healthcare organization members the ability to view biomed cases associated with their healthcare organization.

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Select **Edit**.
7. Add the **sn_cto_biomed.loc_support_agent** role into the Roles List.
8. Select **Save**.

Result
A user group is created for your location support agents to which you can assign your biomed fulfillers when doing automated user imports.

Example - Create a group for all Biomed location support agents

Explore how a group can be created that contains the correct roles location support agents and users can be added to in order to inherit those permissions.

Before you begin
Role required: admin

About this task
Armand is a ServiceNow administrator for a hospital who needs to set up Alectri Health Santa Clara Biomed support agents as users. Armand decides to create a group for all support agents in ServiceNow that includes the sn_cto_biomed.loc_support_agent role. Users added to that group will then inherit the correct biomed support agent permissions.

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Procedure

1. Navigate to **All > User Administration > Groups**.
2. Select **New**.
3. In the name field, enter **Biomed Alectri Santa Clara Location Support Agent**.
4. In the Description field, enter **Any user who will be a Biomed support agent for the Alectri Santa Clara Biomed support department.**
5. Fill in other fields as needed.
6. Navigate to the roles related list.
7. Click **Edit**.
8. Add the **sn_cto_biomed.loc_support_agent** role into the Roles List.
9. Click **Save**.

Result
A group for all biomed location support agents has been created, which Armand can assign biomed support agents users to.

Create a group for all location managers in Care Team Operations for Biomed

Create a group for location managers with the sn_customerservice.svc_location_manager role assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Biomed.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Click **Edit**.
7. Add the the sn_customerservice.svc_location_manager and sn_cto_biomed.loc_support_agent roles into the Roles List.
8. Click **Save**.

Result
A user group has been created for your location managers.

Example - Create a group for all Biomed location support managers

Explore how a group can be created that contains the correct roles location support managers which users can then be added to in order to inherit those permissions.

Before you begin
Role required: admin

About this task
Armand is a ServiceNow administrator for a hospital who needs to set up Alectri Health Santa Clara Biomed support managers as users. Armand decides to create a group for all support

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managers in ServiceNow that includes the sn_cto_biomed.loc_support_manager role. Users added to that group will then inherit the correct biomed support manager permissions.

Procedure

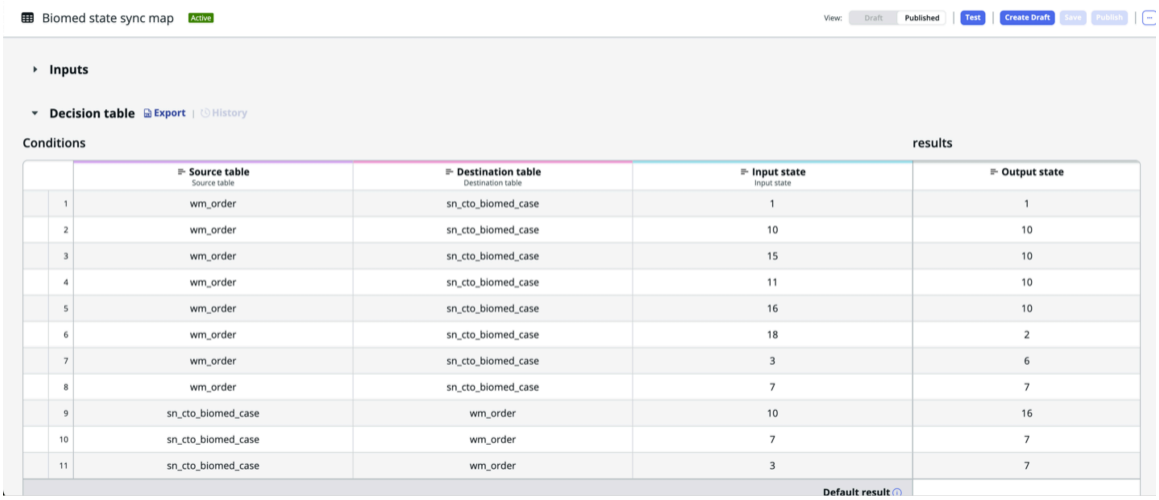
1. Navigate to **All > User Administration > Groups**.
2. Select **New**.
3. In the name field, enter **Biomed Alectri Santa Clara Location Support Manager.**.
4. In the Description field, enter **Any user who will be a Biomed support manager for the Alectri Santa Clara Biomed support department**.
5. Fill in other fields as needed.
6. Navigate to the roles related list.
7. Click **Edit**.
8. Add the **sn_cto_biomed.loc_support_manager** role into the Roles List.
9. Click **Save**.

Result

A group for all biomed location support managers has been created. Armand can assign biomed support mangers users to this group as needed.

Modify state decision tables in Care Team Operations for Biomed

Use Decision Builder to change the state mappings for cases and work orders in Care Team Operations for Biomed#.



	Source table (Source table)	Destination table (Destination table)	Input state (Input state)	Output state
1	wm_order	sn_cto_biomed_case	1	1
2	wm_order	sn_cto_biomed_case	10	10
3	wm_order	sn_cto_biomed_case	15	10
4	wm_order	sn_cto_biomed_case	11	10
5	wm_order	sn_cto_biomed_case	16	10
6	wm_order	sn_cto_biomed_case	18	2
7	wm_order	sn_cto_biomed_case	3	6
8	wm_order	sn_cto_biomed_case	7	7
9	sn_cto_biomed_case	wm_order	10	16
10	sn_cto_biomed_case	wm_order	7	7
11	sn_cto_biomed_case	wm_order	3	7
			Default result	

The Healthcare Biomed case state sync map displays all current mappings between Healthcare Biomed case and work order states.

To modify these state mappings, see Modify decision table structure in Workflow Studio.

To learn more about decisions tables, see Edit decision tables using draft authoring and Use decision tables.

The source table aligns with the input state and the destination table aligns with the output state.

These values can be found in the Dictionary Entry for the State field.

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Healthcare Biomed case state default values

Label	Value
Cancelled	7
Open	10
Closed	3
Awaiting info	18
New	1
Work in Progress	2
Resolved	6

Work Order state default values

Label	Value	Sequence
Cancelled	7	10
Assigned	16	6
Awaiting Approval	11	1
Draft	1	0
Closed Incomplete	4	9
Qualified	10	4
Closed Complete	3	8
Awaiting Qualification	15	3
Scheduled	12	5
Approved	13	2
Work in Progress	18	7

Add custom record producers to the service catalog in Care Team Operations for Biomed

Add custom record producers you have configured into service catalogs in Care Team Operations for Biomed.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Record Producers**.
2. Select **New**.
3. Set the table name to **Healthcare Biomed Case [sn_cto_biomed_case]**.
4. In the Accessibility tab, set Catalogs to **Biomed service**.
5. Set the Category field to the desired service category.
6. Add in the following common variable sets.

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7. Recommended - Add in the following catalog client scripts.

8. Fill in other fields as needed.
9. Select **Save**.

Result
You have created a custom record producer for use with Care Team Operations for Biomed.

Creating service requests in Care Team Operations for Biomed

Use the Care Team Portal to report medical device issues or request other biomed support.

- Report a medical device issue with Care Team Operations for Biomed

  Report any issue with a medical device issue using the Report a medical device issue catalog item from the Care Team Operations portal.

- Request other biomed service with Care Team Operations for Biomed

  Request non-medical device issue biomed service using the Request other biomed service catalog item from the Care Team Portal.

Report a medical device issue with Care Team Operations for Biomed

Report any issue with a medical device issue using the Report a medical device issue catalog item from the Care Team Operations portal.

Before you begin
Role required: sn_hco.care_team_member

Procedure

1. In the Care Team Portal, navigate to **Create a request** > **Request biomed service** > **Report a medical device issue**.
2. Fill in the following fields.

Field	Description
Unit	The unit associated with this request.
Asset tag or serial number	The asset tag or serial numeric value associated with the medical device experiencing an issue.
Identified asset	
Asset model	The asset model of the medical device experiencing an issue.
Location	The location of the medical device.
Short description	A short summary of your issue.
Describe your request in detail	Add a detailed description of the device issue occurring.

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Field	Description
	Provide as much relevant information as possible.
Urgency	The urgency of this issue. Options are: ○ 1 - High ○ 2 - Medium ○ 3 - Low
Contact person	The associated contact for this request.
Phone type	The phone type associated with the contact number. Options are: ○ Business ○ Mobile ○ Other
Contact number	The phone number of the associated contact for this request.

3. Select **Submit**.

Request other biomed service with Care Team Operations for Biomed

Request non-medical device issue biomed service using the Request other biomed service catalog item from the Care Team Portal.

Before you begin

Role required: sn_hco.care_team_member

Procedure

1. In the Care Team Portal, navigate to **Create a request** > **Request biomed service** > **Request other biomed service**.
2. Fill in the following fields.

Field	Description
Unit	The unit associated with the biomed issue.
Location	The location of the biomed issue.
Short description	A short summary of your issue.
Describe your request in detail	Add a detailed description of the biomed issue that has occurred. Provide as much relevant information as possible.
Urgency	The urgency of this issue. Options are:

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Field	Description
	○ 1 - High ○ 2 - Medium ○ 3 - Low
Contact person	The associated contact for this request.
Phone type	The phone type associated with the contact number. Options are: ○ Business ○ Mobile ○ Other
Contact number	The phone number of the associated contact for this request.

3. Select **Submit**.

Fulfilling service requests in Care Team Operations for Biomed

Healthcare Biomed cases can be fulfilled one of two ways, depending on what plugin you have installed.

For Care Team Operations for Biomed to create work orders from Healthcare Biomed cases, the Field Service Management [com.snc.work_management] plugin must be installed.

This plugin provides all roles and features needed for the healthcare biomed case to synchronize to work orders.

It also provides the following roles for Care Team Operations for Biomed:

- biomed.dispatcher
- biomed.agent
- biomed.qualifier

For information on fulfilling work orders, see Manage work orders.

If the Field Service Management [com.snc.work_management] plugin isn't installed:

Work orders aren't created from healthcare biomed cases. Instead, agents work on fulfilling those cases directly from Workspace.

Cases created are assigned to assignment groups based on the requesting location associations and are configured normally.

For information on fulfilling cases, see Manage cases in Customer Service Management.

Care Team Operations for Biomed Reference

Reference topics provide additional information about Care Team Operations for Biomed components.

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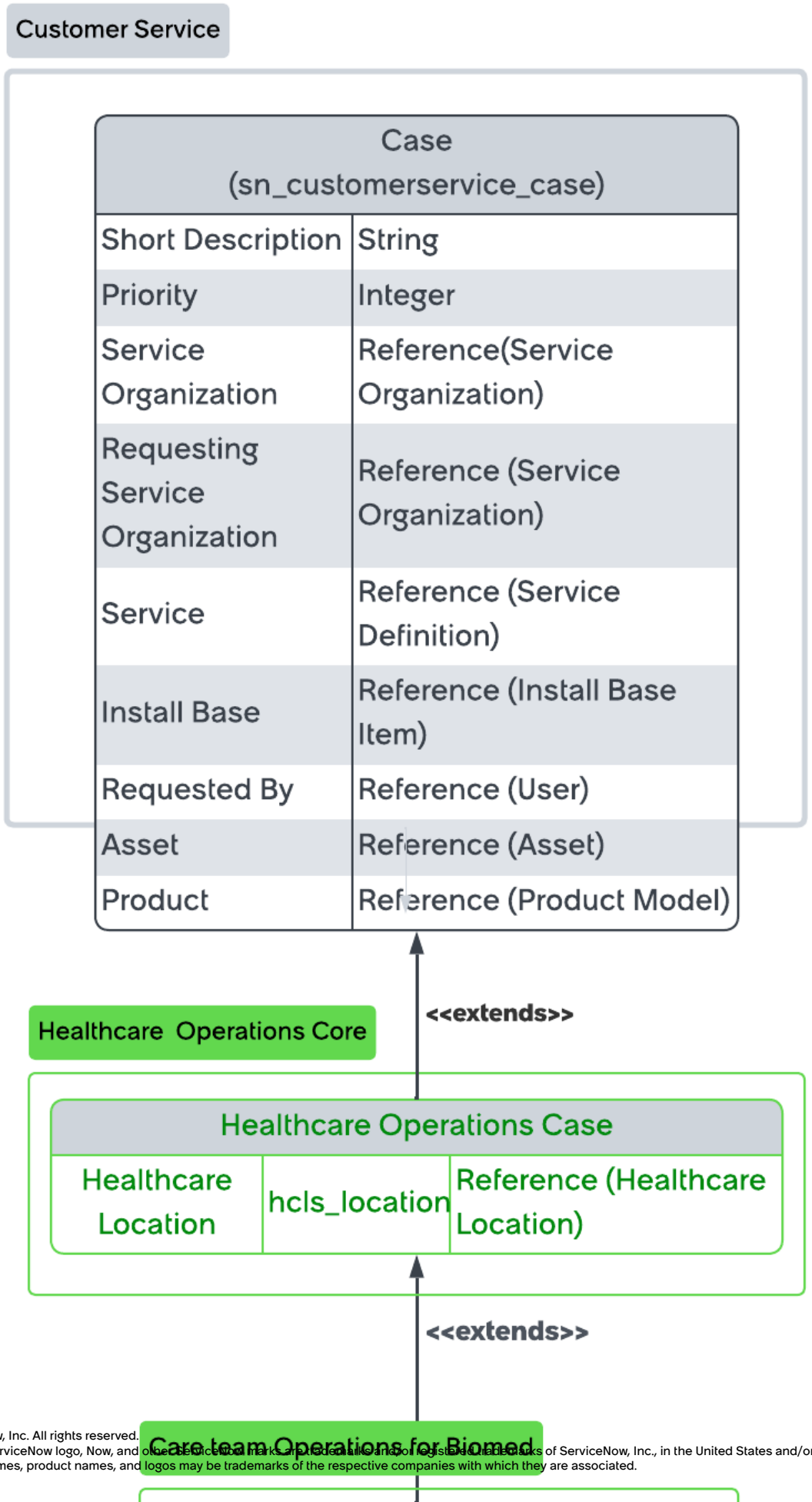
Care Team Operations for Biomed data model

Learn about the#Care Team Operations for Biomed#application by viewing the data model and role relationship diagrams.

These diagrams show the relationships between the tables within the application and provide an overall picture of how the#Care Team Operations for Biomed#application operates.

The following diagram shows the tables and their relationships within the#Healthcare Operations for Biomed application.

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Care Team Operations for Biomed case table

The Care Team Operations for Biomed Case [sn_cto_biomed_case] enables streamlined support for operational healthcare IT use cases.

It extends the Healthcare Operations Core case table.

Field	Description
Case number	The case number for this healthcare biomed case. Generated automatically when created.
Work Order	Generated automatically from the healthcare biomed case.
Requesting organization	The organization associated with the requester.
Opened by	The user who created the healthcare biomed request.
State	The current state of the healthcare biomed case. Synchronizes with the associated work order automatically when the Field Service Management plugin is installed.
Supporting organization	The supporting organization responsible for the work order or case.
Assignment group	The assignment group designated for the fulfillment of the associated case or work order.
Assigned to	The user assigned to fulfill this case or associated work order.
Opened	Date and time healthcare case was opened.

Components installed with Care Team Operations for Biomed

Several types of components such as tables, user roles, and business rules are installed when you install the Care Team Operations for Biomed plugin.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see https://www.servicenow.com/docs/bundle/yokohama-platform-administration/page/administer/plugins/task/find-components.html.

Tables installed with Care Team Operations for Biomed

Tables installed with Care Team Operations for Biomed

Table name	Description
Care Team Operations for Biomed case (sn_cto_biomed_case)	Abstract case type that provides a foundation to extend from when building your own operational request types.

Roles installed with Care Team Operations for Biomed

Roles installed with Care Team Operations for Biomed

sn_cto_biomed.admin	Biomed Admin	Biomed Admin role for Care team operation.

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sn_cto_biomed.loc_support_agent	Biomed Support Agent	Can view/resolve all cases under their assignment group, tracks, and fulfill cases.
sn_cto_biomed.viewer	Biomed Viewer	Can view Biomed and HCLS foundation data.
sn_cto_biomed. loc_contributor	CTO Biomed Location Contributor	Report cases, respond to cases, track cases at business location, ran view cases under their team. **Note:** This role is automatically inherited into the Care Team Member role when the Care Team Operations for Biomed plugin is installed.

Plugins installed with Care Team Operations for Biomed

Plugin name	Description
Care Team Portal (com.sn_cto_sp)	Provides a portal experience for Care Team Operations for Biomed users to create requests for supporting departments, manage teams, and gain visibility into submitted requests.
Healthcare Operations Core [com.sn_hco]	Healthcare Operations Core provides clinicians a uniform interface to report and track issues related to their day-to-day operations. This plugin helps hospitals eliminate inefficient manual processes, reduce patient safety risks, and increase patient satisfaction through timely resolution of issues and completion of important tasks.

Care Team Operations for Environmental Services

Care Team Operations for Environmental Services contains the case types to report and fulfill environmental services support issues in hospitals.

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Get started

Explore  Learn how care teams use Care Team Operations for Environmental Services.	Configure  Plan and configure your application.	Request  Create operational support requests for your Healthcare Environmental Services department.
Resolve  Resolve support requests in the form of cases or work orders.	Reference  Get details about components like fields, tables, and properties.	

Exploring Care Team Operations for Environmental Services

Use the Care Team Operations for Environmental Services application to support your care team in resolving environmental support issues quickly and efficiently.

Care Team Operations for Environmental Services overview

Care Team Operations for Environmental Services contains the case types to report and fulfill environmental support issues in hospitals.

Care Team Operations for Environmental Services provides care teams with a streamlined platform to report issues for environmental support. Using the Care Team Portal, care team members can raise an issue with the Environmental Services case type. A work order is then automatically created from this case, which support agents in the Environmental Services department then manage using the Service Operations workspace as they fix the issue.

A range of service requests come preconfigured for use with Care Team Operations for Environmental Services. The Healthcare EVS case [sn_cto_evs_case] type can also be extended to create custom request types.

Note:
Care Team Operations for Environmental Services requires installation of the Healthcare Operations Core and Care Team Portal plugins.

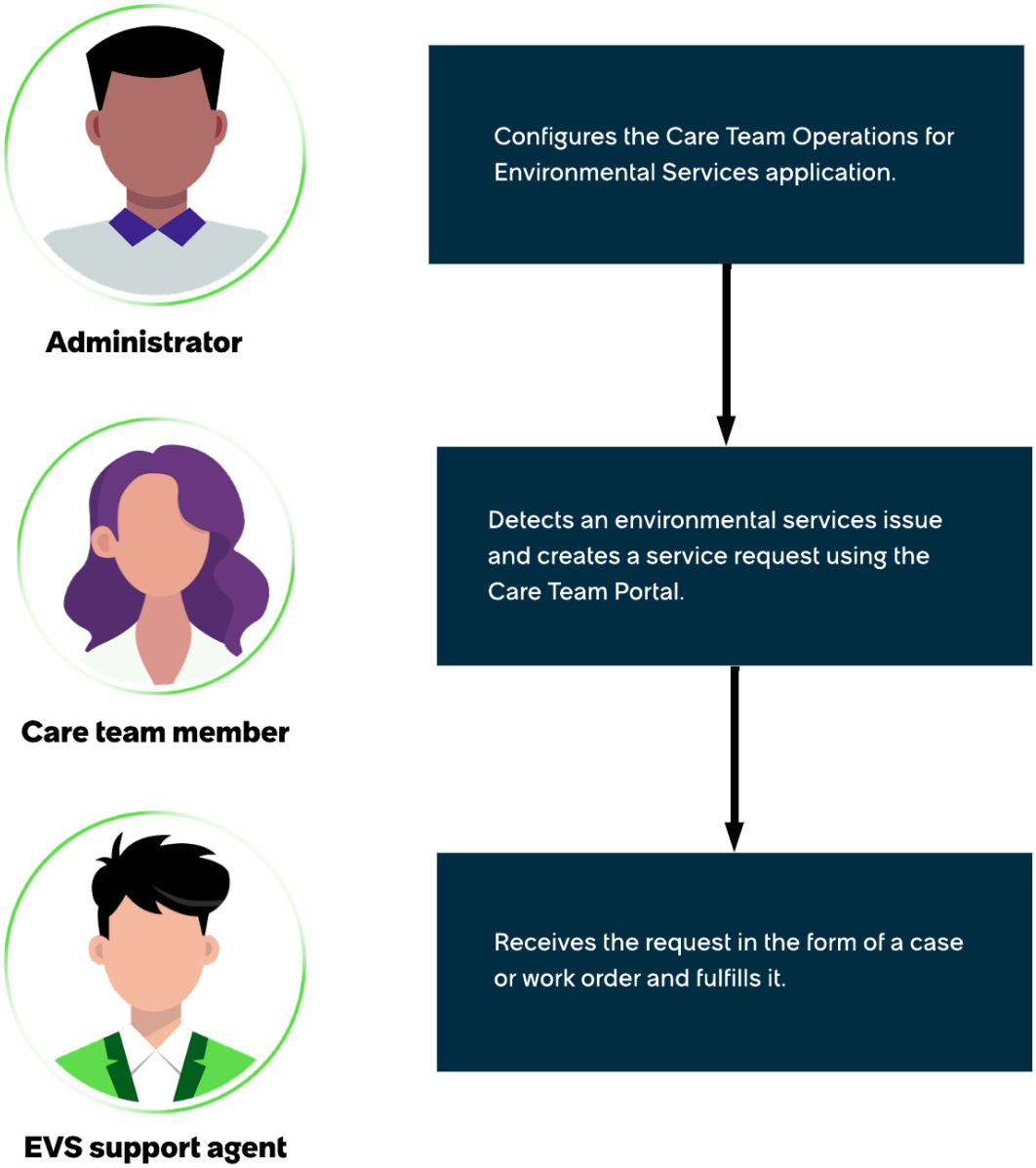
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Care Team Operations for Environmental Services users

User	Description
Nurse assistant	Nurse assistants provide care to patients in healthcare facilities, assisting with daily living, monitoring patient health, and providing vital support to nurses and medical staff.
Registered Nurse	Registered nurses are responsible for providing and coordinating patient care, educating patients and their families about various health concerns, administering medications and treatments, and collaborating with other healthcare professionals to develop and implement care plans.
Unit Manager	Unit Managers oversee the operations of a specific unit within a healthcare facility, supervise staff, manage resources, and confirm the delivery of high-quality patient care.
Unit Secretary	Unit secretaries provide administrative support to nursing units and facilitate communication between staff, patients, and families while maintaining patient records.
Environmental Services Support Agent	Environmental Services support agents create, view, edit, and fulfill service requests created by the care team on behalf of the hospital's Environmental Services department.
Environmental Services Agent Manager	Environmental Services agent managers oversee the Environmental Service department's agents and confirm that requests are fulfilled in an effective and timely manner.

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Care Team Operations for Environmental Services workflow



1. An administrator configures the Care Team Operations for Environmental Services application.
2. A care team member detects an Environmental Services issue and reports it using the Care Team Portal.
3. An Environmental Services support agent receives the request as a work order and fulfills it using CSM/FSM Configurable Workspace.

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Care Team Operations for Environmental Services benefits

Care Team Operations for Environmental Services benefits

Benefit	Feature	Users
Automate healthcare operations by enabling Environmental Services support request creation and fulfillment.	Healthcare EVS case overview	Admin
Create support requests using Care Team Portal.	Creating service requests for Care Team Operations for Environmental Services	Care team
Use CSM/FSM Configurable Workspace to fulfill EVS service requests as work orders when FSM is installed, or as cases.	Fulfilling requests in Care Team Operations for Environmental Services	Agent

What to explore next

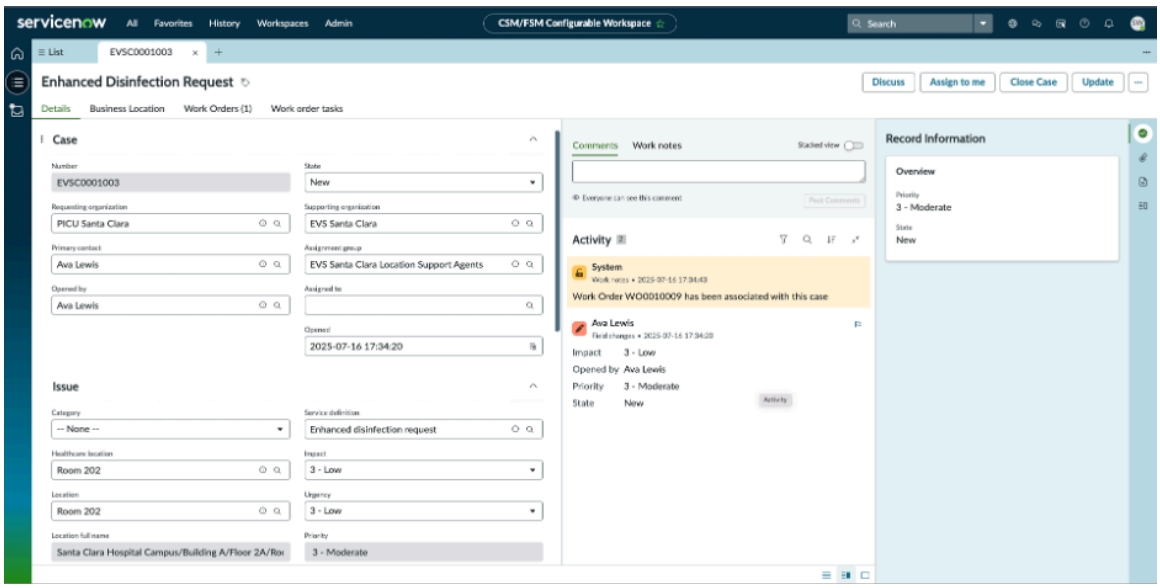
To learn more about configuring and using Care Team Operations for Environmental Services, see:

- Configuring Care Team Operations for Environmental Services
- Creating service requests for Care Team Operations for Environmental Services
- Fulfilling requests in Care Team Operations for Environmental Services
- Care Team Operations for Environmental Services Reference

Healthcare EVS case overview

Use the Healthcare EVS case [sn_cto_evs_case] to create case types for environmental service support requests.

Healthcare Environmental Services case overview



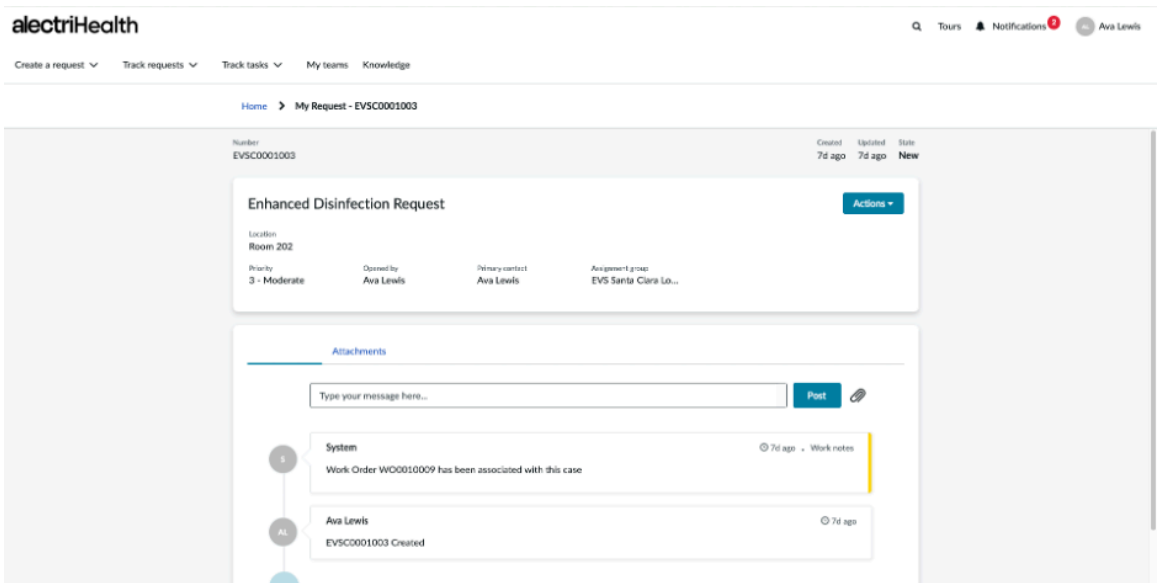
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If the Field Service Management [com.snc.work_management] plugin is installed, Healthcare EVS cases automatically generate related work orders that are assigned to supporting agents with the fulfiller role. If this plugin isn't installed, support agents must fulfill the case itself.

By associating these cases with specific healthcare organizations, care team members can easily view all cases created for their team, unit, or organization.

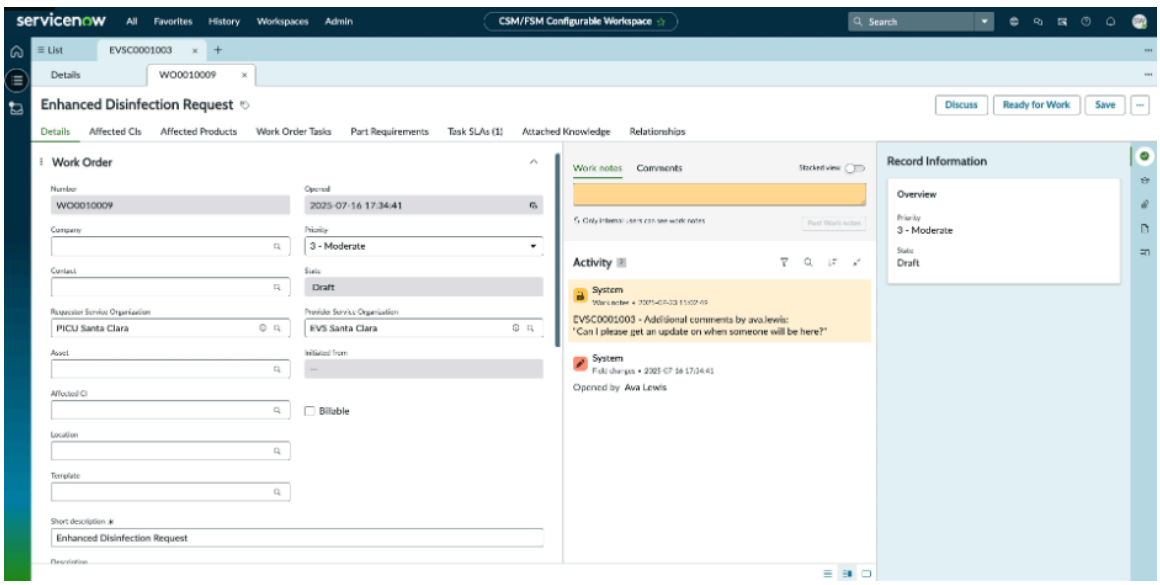
Any updates, comments, or status changes made to the work order reflects in the case, and vice versa. When a work order is linked to a case, the fulfiller only manages the work order, and the case is then updated to reflect these changes.

Work order auto-creation



Work orders are created automatically in synchronization with Healthcare EVS cases. All information from the Healthcare EVS case is carried over into the incident.

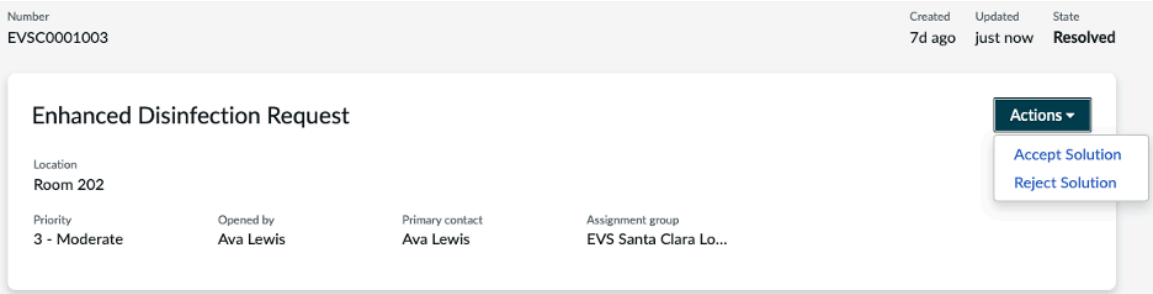
Comment synchronization



Comments on the Healthcare EVS case are viewable on the work order, and comments in the Compose panel of the work order are viewable on the Healthcare EVS case.

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State synchronization



The state of both the work order and the healthcare case remains in synchronization throughout the entire fulfillment process. Use the Care Team Portal to track your case state in real time through viewing case details in the portal.

Note:
In Care Team Operations for Environmental Services, case data only synchronizes with work orders and doesn't synchronize with work order tasks. Only updates made to the work order affect the associated case data.

Configuring Care Team Operations for Environmental Services

Set up the Care Team Operations for Environmental Services application.

Configuration overview

1. Install Care Team Operations for Environmental Services

   Install the Care Team Operations for Environmental Services application (sn_cto_evs) if you have the admin role.

2. Set up work order synchronization in Care Team Operations for Environmental ServicesThe Field Service Management [com.snc.work_management] plugin is required for work order synchronization to function with Care Team Operations for Environmental Services.
3. Set up roles for Care Team Operations for Environmental Services

   Ensure that the correct roles are assigned to users of Care Team Operations for Environmental Services.

4. Create healthcare organizations for your healthcare EVS support teams

   Create a healthcare organization to represent the fulfilling healthcare organization for environmental services cases.

5. Create a group for all location support agents in Care Team Operations for Environmental Services

   Create a group for location support agents with the sn_cto_evs.loc_support_agent role assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Environmental Services.

6. Create a group for all location managers in Care Team Operations for Environmental Services

   Create a group for location managers with the sn_customerservice.svc_location_manager assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Environmental Services.

7. Set up assignment groups for Care Team Operations for Environmental Services

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Associate assignment groups with your healthcare organizations to determine which user groups are associated with specific healthcare organizations.

8. Modify state decision tables in Care Team Operations for Environmental Services

   Use Decision Builder to change the state mappings for cases and incidents work orders in Care Team Operations for Environmental Services.

9. Add custom record producers to the service catalog in Care Team Operations for Environmental Services

   Add customer record producers to the service catalog for use with Care Team Operations for Environmental Services.

Install Care Team Operations for Environmental Services

Install the Care Team Operations for Environmental Services application [sn_cto_evs] if you have the admin role.

Before you begin
Role required: admin

About this task
The application includes demo data for Care Team Operations for Environmental Services and installs related applications and plugins when they aren't already installed.

Note:
The Care Team Operations for Environmental Services application is dependent on the Healthcare Operations Core application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Care Team Operations for Environmental Services application [sn_cto_evs] using the filter criteria and search bar.
   You can search for the application by its name or ID. If you can't 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**.

Set up work order synchronization in Care Team Operations for Environmental Services

The Field Service Management [com.snc.work_management] plugin is required for work order synchronization to function with Care Team Operations for Environmental Services.

For Care Team Operations for Environmental Services to create work orders from Healthcare Environmental Services cases, the Field Service Management [com.snc.work_management] plugin must be installed.

This plugin provides all roles and features needed for the healthcare environmental services case to synchronize with work orders.

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For information on fulfilling work orders, see Manage work orders.

If the Field Service Management [com.snc.work_management] plugin isn't installed:

Work orders aren't created from healthcare environmental services cases. Instead, agents work on fulfilling those cases directly from their portals.

Cases created are assigned to assignment groups based on the requesting location associations and are configured normally with CSM case management functionality.

Set up assignment groups for Care Team Operations for Environmental Services

Associate assignment groups with your healthcare organizations to determine which user groups are associated with specific healthcare organizations.

Before you begin

Role required: admin

About this task

In Care Team Operations for Environmental Services, assignment groups must be configured so that work orders created from environmental services cases can be fulfilled.

Important:

The various steps of fulfilling work orders require that assignment groups be created as follows:

- **Environmental Services qualifier:** To set up evs.qualifier roles, you must be assigned the Environmental Services Qualifier group, which contains the sn_cto_evs.loc_support_agent role and the wm_qualifier roles.
- **Environmental Services dispatch:** To set up environmental services dispatch roles, you must be assigned the Environmental Services Dispatcher group, which contains the wm_dispatcher and sn_cto_evs.loc_support_agent roles.

> **Note:**
> In Agent assignment groups, the Covered by Dispatch Groups tab must be used to indicate which groups can fulfill for them.

For both of the preceding roles, the **Locations Covered** related list displays all locations you can qualify or dispatch for.

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations**.
2. Select the healthcare organization that you want to associate an assignment group with.
3. In the Assignment Groups related list, select **New**.
4. On the Service Organization Assignment Group form, fill in the fields.

Service Organization Assignment Group form:

Field	Description
Service organization	Auto-populated with the name of the healthcare organization to which you're adding an assignment group.

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Assignment group	Name of the assignment group that is to be added.

5. Select **Submit**.

Setting up roles and responsibilities in Care Team Operations for Environmental Services

To manage access effectively in Care Team Operations for Environmental Services, first understand how roles and responsibilities work together. These concepts build on the Service Model Foundation (SMF) but are adapted for Healthcare Operations-specific use cases.

To understand how roles and responsibilities function in Healthcare Operations, see Setting up roles and responsibilities for Healthcare Operations users.

The following roles and responsibilities are included with Care Team Operations for Environmental Services:

Role	Responsibility	Description
sn_cto_evs.loc_support_agent	Support Department Agent Inherits Location Support Agent responsibility from Service Model Foundation.	Can view/resolve all cases under their assignment group, tracks, and fulfill cases.

What to do next

1. Set up roles for Care Team Operations for Environmental Services
2. Assign responsibilities to Care Team Operations for Environmental Services users

Set up roles for Care Team Operations for Environmental Services

Assign the correct roles to users of Care Team Operations for Environmental Services.

Before you begin
Role required: admin

About this task
Roles control access to features, capabilities, and data in the Care Team Operations for Environmental Services application.

You can assign roles to individual users or groups. When you apply roles to groups, the members of those groups inherit those roles.

Note:
User roles can be configured during the initial setup process for healthcare organizations, or at any time thereafter as needed.

Roles installed with Care Team Operations for Environmental Services

sn_cto_evs.loc_support_agent	Environmental services support department agent	Can view/resolve all cases under their assignment group, track cases, and fulfill cases.

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Roles installed with Care Team Operations for Environmental Services (continued)

		Note: If view access to work orders is needed, this role can contain the wm_read role.

Example:

To fulfill work orders created from the Care Team Portal using the Care Team Operations for Environmental Services plugin, you must be assigned the sn_cto_evs.loc_support_agent role.

Procedure

1. Navigate to **All** > **User Administration** > **Users** then open a user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**.
4. Select **Save**.

Assign responsibilities to Care Team Operations for Environmental Services users

Assign responsibilities to users in Care Team Operations for Environmental Services to dictate which specific records users are authorized to view or modify.

Before you begin
Role required: admin

About this task
You can edit the responsibilities of Care Team Operations for Environmental Services users when adding or removing members from your healthcare organizations, or at any time as needed.

Responsibility	Role
Support Department Agent	sn_cto_evs.loc_support_agent

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **All**.
2. Select the parent organization.
3. Navigate to the **Members** related list.
4. Select **Edit members**.
5. In **Responsibility**, select the intended responsibility for the user.
6. Use the arrows between the **Available** and **Selected** panels to add the member.

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Note:

If a newly added user isn't populated in the Available list, search for them manually using the lookup icon.

On occasion, newly added members don't appear within the Selected panel due to property configurations. If this occurs, see Configure global system properties to edit members in Healthcare Operations Core.

7. Select **Save**.

Create healthcare organizations for your healthcare EVS support teams

Create a healthcare organization to represent the fulfilling healthcare organization for environmental services cases.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **Hospital Departments**.
2. Select **New**.
3. In the name field, enter a name that reflects your facilities support organization. For example, Environmental Services Support.
4. Fill in the other fields as needed.
5. Select **Submit**.

What to do next
Assign members to your newly created healthcare environmental services support organization.

Create a group for all location support agents in Care Team Operations for Environmental Services

Create a group for location support agents with the **sn_cto_evs.loc_support_agent** role assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Environmental Services.

Before you begin
Role required: admin

About this task
The location support agent role will only give healthcare organization members the ability to view environmental services cases associated with their healthcare organization.

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Select **Edit**.

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7. Add the **sn_cto_evs.loc_support_agent** role into the Roles List.
8. Select **Save**.

Result
A user group is created for your location support agents to which you can assign your environmental services support agents when doing automated user imports.

Create a group for all location managers in Care Team Operations for Environmental Services

Create a group for location managers with the **sn_customerservice.svc_location_manager** assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Environmental Services.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Click **Edit**.
7. Add the the sn_customerservice.svc_location_manager and sn_cto_evs.loc_support_agent roles into the Roles List.
8. Click **Save**.

Result
A user group has been created for your environmental services department location managers.

Modify state decision tables in Care Team Operations for Environmental Services

Use Decision Builder to change the state mappings for cases and incidents work orders in Care Team Operations for Environmental Services.

The Healthcare Environmental Services case state sync map displays all current mappings between Healthcare Environmental Services case and work order states.

To modify these state mappings, see Modify decision table structure in Workflow Studio.

To learn more about decisions tables, see Edit decision tables using draft authoring and Use decision tables.

The source table aligns with the input state and the destination table aligns with the output state.

These values can be found in the Dictionary Entry for the State field.

Healthcare Environmental Services case state default values

Label	Value
Cancelled	7
Open	10

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Label	Value
Closed	3
Awaiting info	18
New	1
Work in Progress	2
Resolved	6

Work Order state default values

Label	Value	Sequence
Cancelled	7	10
Assigned	16	6
Awaiting Approval	11	1
Draft	1	0
Closed Incomplete	4	9
Qualified	10	4
Closed Complete	3	8
Awaiting Qualification	15	3
Scheduled	12	5
Approved	13	2
Work in Progress	18	7

Add custom record producers to the service catalog in Care Team Operations for Environmental Services

Add custom record producers that you have configured into service catalogs in Care Team Operations for Environmental Services.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Record Producers**.
2. Select **New**.
3. Set the table name to **Healthcare EVS Case [sn_cto_evs_case]**.
4. In the Accessibility tab, set Catalogs to **EVS service**.
5. Set the Category field to the desired service category.
6. Add in the following common variable sets.

7. Recommended - Add in the following catalog client scripts.

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8. Fill in other fields as needed.
9. Select **Save**.

Creating service requests for Care Team Operations for Environmental Services

Use Care Team Operations for Environmental Services to report environmental services issues using Care Team Portal.

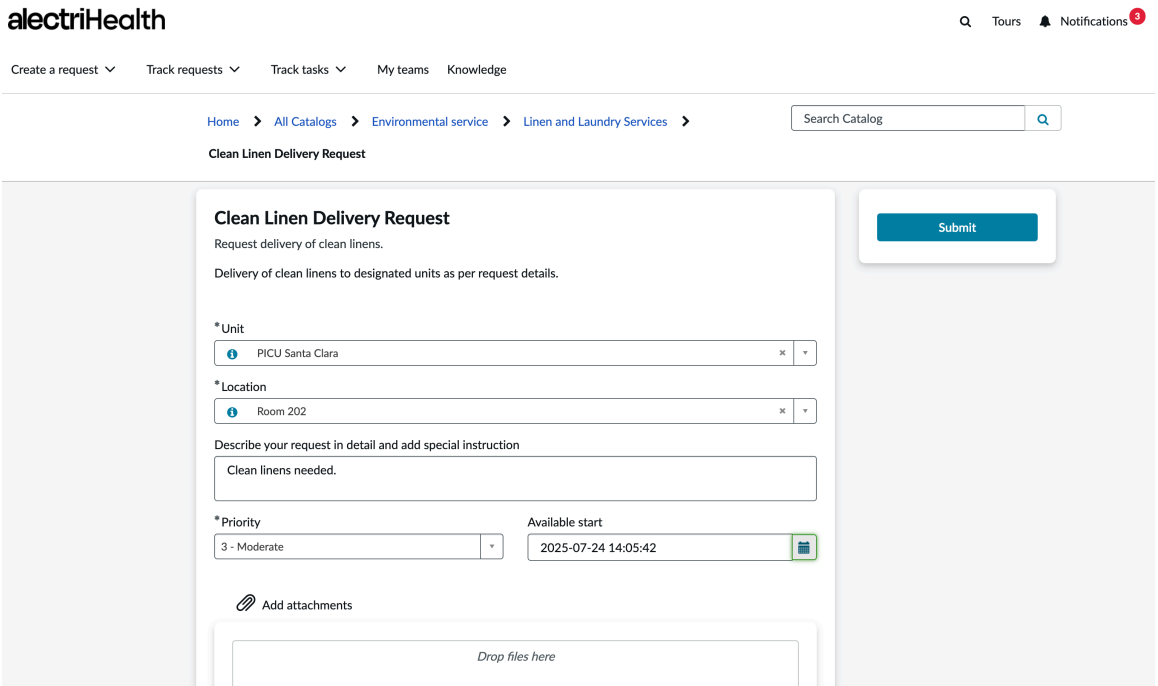
Create an environmental services support request using Care Team Portal

Use the Care Team Portal to create an environmental services support request.

Before you begin

Role required: sn_hco.care_team_member

About this task



Care Team Operations for Environmental Services comes with preconfigured service requests for facilities support departments.

Select the catalog item that aligns with your request type.

For example, a nurse who notices a room needs clean linens would navigate to **Create a request > Request environmental service > Clean Linen Delivery request** and fill in the request details.

For detailed information on the Care Team Operations for Environmental Services service catalog, see Service Catalog installed with Care Team Operations for Environmental Services.

Procedure

1. In the Care Team Portal, navigate to **Create a request** > **Request environmental service**.
2. Choose the appropriate catalog item for your support request.
3. In the form that appears, fill in fields as needed.

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Field	Description
Unit	The unit associated with the request.
Location	The healthcare location in which environmental support is needed.
Description	Optionally, enter a description of the issue to assist the support agent.
Category	The category of this request. For a detailed list of categories, see Service Catalog installed with Care Team Operations for Environmental Services.
Priority	The priority of the issue. Options are: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4. Low
Available start	The day and time in which support can attempt to resolve the issue.

4. **Optional:** Add attachments as needed.
5. Select **Submit**.

Fulfilling requests in Care Team Operations for Environmental Services

Healthcare Facilities cases can be fulfilled one of two ways, depending on what plugin you have installed.

For Care Team Operations for Environmental Services to create work orders from Healthcare EVS cases, the Field Service Management [com.snc.work_management] plugin must be installed.

This plugin provides all roles and features needed for the Healthcare EVS case to synchronize to work orders.

For information on fulfilling work orders, see Manage work orders.

If the Field Service Management [com.snc.work_management] plugin isn't installed:

Work orders aren't created from Healthcare EVS cases. Instead, agents work on fulfilling those cases directly from the CSM/FSM Configurable Workspace.

Cases created are assigned to assignment groups based on the requesting location associations and are configured normally.

For information on fulfilling cases, see Manage cases in Customer Service Management.

Care Team Operations for Environmental Services Reference

Reference topics provide additional information about Care Team Operations for Environmental Services components.

Care Team Operations for Environmental Services tables

The Healthcare EVS Case [sn_cto_evs_case] enables streamlined support for environmental services support use cases.

It extends the Healthcare Operations Core case.

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Healthcare EVS Case [sn_cto_evs_case]

Field	Description
Number	The case number for this Healthcare EVS case. Generated automatically when created.
Short description	Brief description of the issue.
Description	Description of the issue.
Category	The type of service.
Healthcare location	Healthcare location where the issue is being reported.
Location	Common location mapped to the healthcare location.
State	The current state of the Healthcare EVS case. Synchronizes with the associated work order automatically when the Field Service Management plugin is installed.
Priority	Sequence in which the case should be resolved.
Urgency	Speed at which the case should be resolved.
Impact	Level of disruption caused. Indicates the size of the issue.
Opened by	The user who submitted the case.
Primary contact	The user for whom the case is created.
Assignment group	The assignment group of the user that fulfills and resolved the request/issue.
Assigned to	The user that fulfills and resolves the request/issue.
Requesting organization	The service organization of the requestor.
Supporting organization	The service organization that fulfills the case/request.
Service	Service definition linked to the case.

Components installed with Care Team Operations for Environmental Services

Several types of components such as tables, user roles, and business rules are installed when you activate the Care Team Operations for Environmental Services plugin.

Tables installed with Care Team Operations for Environmental Services

Table name	Description
Healthcare EVS case [sn_cto_evs_case]	Abstract case type that provides a foundation to extend from when building your own operational request types.

Roles installed with Care Team Operations for Environmental Services

sn_cto_evs.admin	Admin	Configures organizations and team structure for Care Team Operations for Environmental Services.

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Roles installed with Care Team Operations for Environmental Services (continued)

sn_cto_evs.viewer	Case viewer	Can view EVS cases and all HCLS foundation data.
sn_cto_evs.loc_support_agent	Environmental Services support agent	Can view/resolve all cases under their assignment group, track cases, and fulfill cases.
sn_cto_evs.loc_contributor	Location contributor role	Can report cases, respond to cases, track cases at the business location, and view cases under their team. **Note:** This role is automatically inherited into the Care Team Member role when the Care Team Operations for Environmental Services plugin is installed.

Service Catalog installed with Care Team Operations for Environmental Services

The Care Team Operations for Environmental Services service catalog is organized into a hierarchy of EVS-related categories and subcategories that care teams commonly report.

Service Categories

Name	Short Description	Description
Housekeeping and Sanitation Services	Request daily cleaning, terminal cleaning, and high-touch surface disinfection.	Includes requests for daily cleaning, terminal cleaning (isolation room, standard discharge, enhanced/STAT), and high-touch surface disinfection.
Waste Management Services	Request regulated medical waste disposal, general trash pickup, and recycling.	Encompasses regulated medical waste disposal (sharps, trash room maintenance, biohazard pickup), general trash pickup, and recycling requests.
Infection Prevention Support	Request enhanced disinfection and isolation/outbreak cleaning.	Covers enhanced disinfection requests and isolation/outbreak response cleaning for specific areas with detailed precautions.
Linen and Laundry Services	Request clean linen delivery and soiled linen pickup.	Involves clean linen delivery and soiled linen pickup requests, detailing linen type, quantity, and handling instructions.
Hazardous Materials Handling	Request chemical and biohazard spill cleanup.	Includes chemical and biohazard spill cleanup requests, specifying the nature, size, and urgency of the spill along with PPE requirements.
Facility Maintenance Support	Request post-maintenance cleanup and facility issue reporting.	Consists of post-maintenance cleanup requests and facility issue reporting, including area affected and issue description.
Patient Room Turnover Services	Request standard and emergency/STAT room turnover.	Encompasses standard and emergency/STAT room turnover requests, detailing room number, urgency, and specific cleaning instructions.

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Catalog Item/Service Definition	Description
Daily Cleaning Request	Routine cleaning of designated areas according to specified schedules and instructions.
Terminal Cleaning Request	Case categories: • Isolation Room Terminal Clean - Comprehensive cleaning after patient discharge or isolation in rooms requiring high-level disinfection. • Standard Discharge Clean - Thorough cleaning after patient discharge to prepare the room for new occupants. • Enhanced/STAT Cleaning - Immediate and intensive cleaning for emergency situations requiring expedited room turnover.
High-Touch Surface Disinfection	Targeted disinfection of frequently touched surfaces to prevent cross-contamination.
Regulated Medical Waste	Case categories: • Sharps Disposal - Safe disposal of sharp medical instruments such as needles and scalpels. • Trash Room Maintenance - Regular upkeep of trash rooms to ensure cleanliness and order. • Biohazard Waste Pickup - Collection and disposal of biological hazardous waste materials.
General Trash Pickup Request	Routine collection of general trash from specified areas.
Recycling Request	Collection of recyclable materials and transport to designated recycling facilities.
Enhanced Disinfection Request	Intensive disinfection for areas requiring extra precaution due to potential contamination.
Isolation/Outbreak Response Cleaning	Specialized cleaning procedures for areas affected by infectious outbreaks or requiring isolation protocols.
Clean Linen Delivery Request	Delivery of clean linens to designated units as per request details.
Soiled Linen Pickup Request	Collection of used linens from specified locations and handling as per instructions.
Chemical Spill Cleanup Request	Safe cleanup of chemical spills, specifying spill type and required safety measures.
Biohazard Spill Cleanup Request	Cleanup and decontamination of biohazard spills, detailing type and urgency of spill.
Post-Maintenance Cleanup Request	Cleaning services following maintenance work to remove debris and restore the area.
Facility Issue Reporting	Reporting and request for resolution of facility-related issues including detailed descriptions and photos.

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Catalog Item/Service Definition	Description
Standard Room Turnover Request	Routine preparation and cleaning of patient rooms for new admissions according to checklist.
Emergency/STAT Turnover Request	Expedited turnover and cleaning of patient rooms for urgent admissions or emergencies.

Care Team Operations for Facilities

Care Team Operations for Facilities contains the case types to report and fulfill facilities support issues in hospitals.

Get started

Explore  Learn about how care teams use Care Team Operations for Facilities.	Configure  Plan and configure your implementation.	Request  Create operational support requests for your Healthcare Facilities department.
Resolve  Resolve support requests in the form of cases or work orders.	Reference  Get details about components like fields, tables, and properties.	

Exploring Care Team Operations for Facilities

Use the Care Team Operations for Facilities application to resolve facilities issues related to maintenance or repair cases quickly and efficiently.

Care Team Operations for Facilities overview

Care Team Operations for Facilities contains the case types to report and fulfill facilities support issues in hospitals.

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Care Team Operations for Facilities provides care teams with a streamlined platform to report issues to the facilities department for support. Using the Care Team Portal, care team members can raise an issue with the Facilities case type. A work order is then automatically created from this case. Support agents in the Facilities department then manage using the Service Operations workspace as they fix the issue.

A range of service requests come preconfigured for use with Care Team Operations for Facilities. The Healthcare Facilities case [sn_cto_facilities_case] type can also be extended to create custom request types.

Note:
Care Team Operations for Facilities requires installation of the Healthcare Operations Core and Care Team Portal plugins.

Care Team Operations for Facilities users

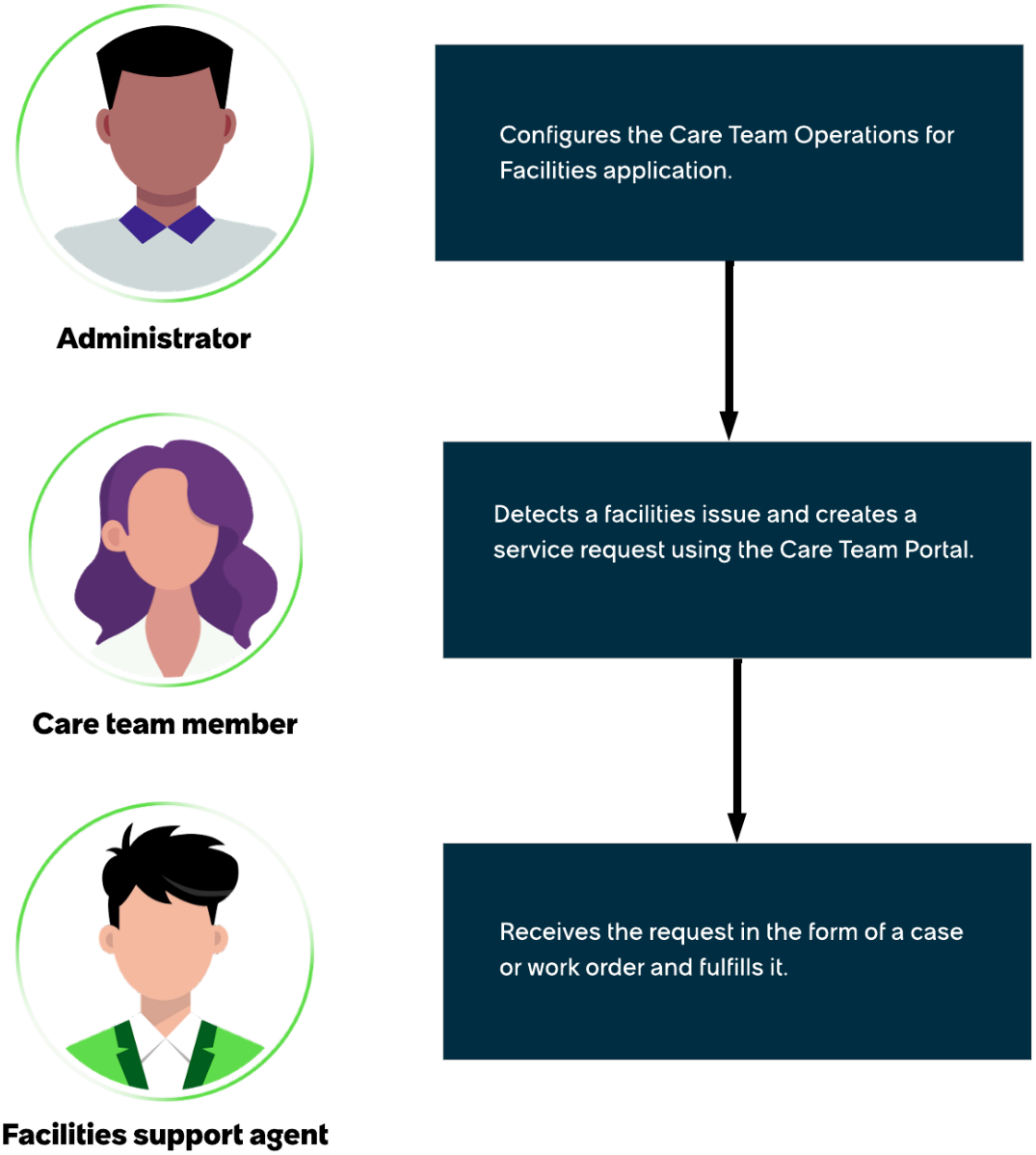
Users

User	Description
Nurse assistant	Nurse assistants provide basic care to patients in healthcare facilities, assisting with daily living, monitoring patient health, and providing vital support to nurses and medical staff.
Registered Nurse	Registered nurses are responsible for providing and coordinating patient care, administering medications and treatments, and collaborating with other healthcare professionals to develop and implement care plans.
Unit Manager	Unit Managers oversee the operations of a specific unit within a healthcare facility, supervise staff, manage resources, and confirm the delivery of high-quality patient care.
Unit Secretary	Unit secretaries provide administrative support to nursing units and facilitate communication between staff, patients, and families while maintaining patient records.
Facilities Support Agent	Facilities support agents create, view, edit, and fulfill service requests created by the care team on behalf of the hospital's facilities support department.
Facilities Agent Manager	Facilities agent managers oversee the facilities support department agents and confirm that requests are fulfilled in an effective and timely manner.

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Care Team Operations for Facilities workflow

Care Team Operations for Facilities workflow



1. An administrator configures the Care Team Operations for Facilities application.
2. A care team member detects a facilities issue and reports it using the Care Team Portal.
3. A facilities support agent receives the request as a case or work order and fulfills it using CSM/FSM Configurable Workspace.

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Care Team Operations for Facilities benefits

Care Team Operations for Facilities benefits

Benefit	Feature	Users
Automate healthcare operations by enabling facilities support request creation and fulfillment.	Healthcare Facilities case overview	Admin
Create support requests and receive visibility to all Facilities service requests created by your teams.	Creating service requests in Care Team Operations for Facilities	Nurse, Nurse assistant, Unit secretary
Use CSM/FSM Configurable Workspace to fulfill facilities service requests.	Fulfilling service requests in Care Team Operations for Facilities	Facilities support agent

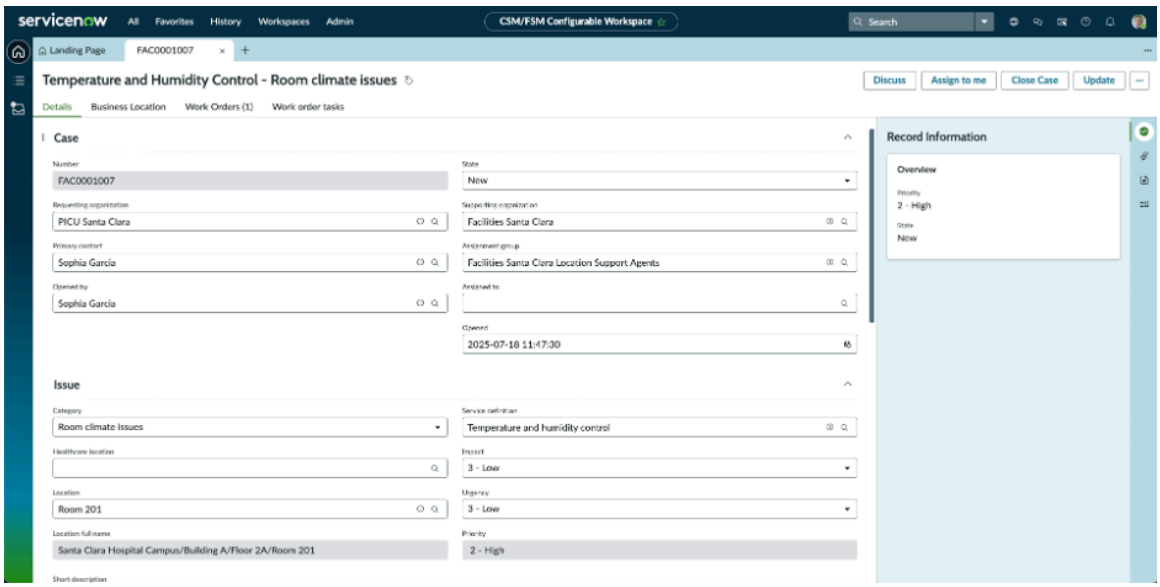
What to explore next

To learn more about configuring and using Care Team Operations for Facilities, see:

- Configuring Care Team Operations for Facilities
- Creating service requests in Care Team Operations for Facilities
- Fulfilling service requests in Care Team Operations for Facilities
- Care Team Operations for Facilities reference

Healthcare Facilities case overview

Use the Healthcare Facilities case [sn_cto_facilities_case] to create case types for facilities support requests.



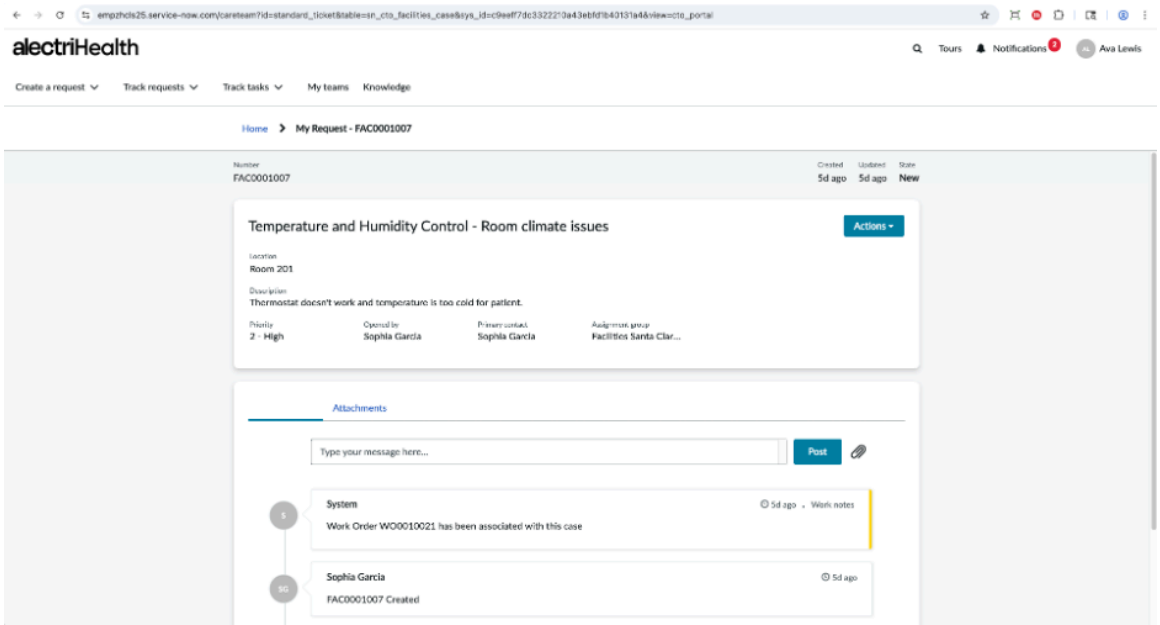
If the Field Service Management [com.snc.work_management] plugin is installed, Healthcare Facilities cases automatically generate related work orders, which are assigned to supporting agents with the fulfiller role. If this plugin isn't installed, support agents must fulfill the case itself.

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By associating these cases with specific healthcare organizations, care team members can easily view all cases created for their team, unit, or organization.

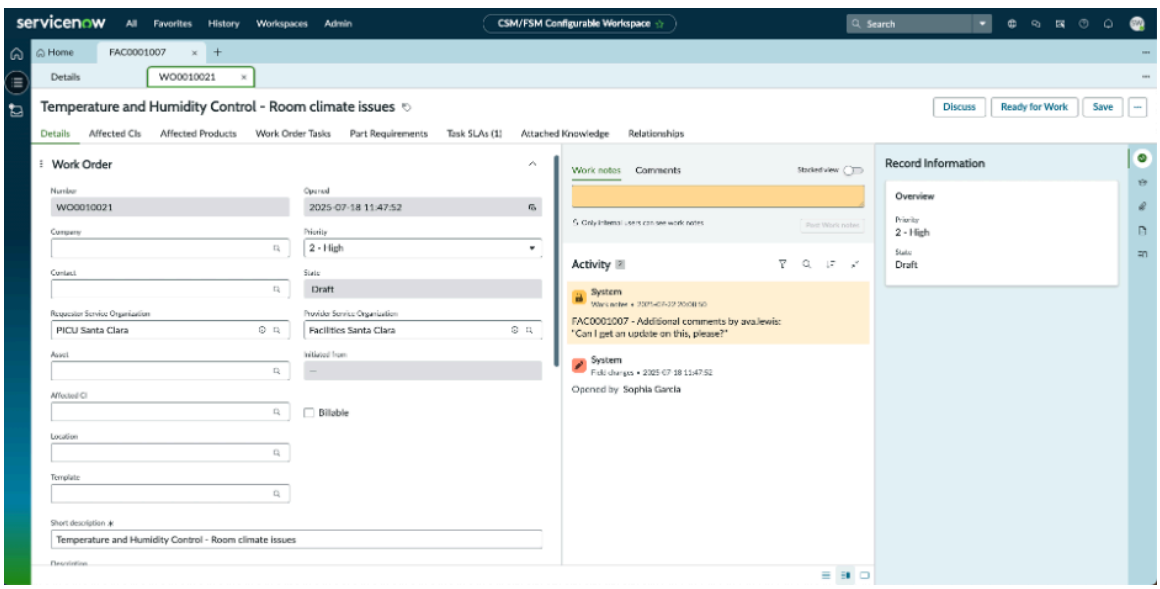
Any updates, comments, or status changes made to the work order reflect in the case, and vice versa. When a work order is linked to a case, the fulfiller only manages the work order, and the case is then updated to reflect these changes.

Work order auto-creation



Work orders are created automatically in synchronization with Healthcare Facilities cases. All information from the Healthcare Facilities case is carried over into the work order.

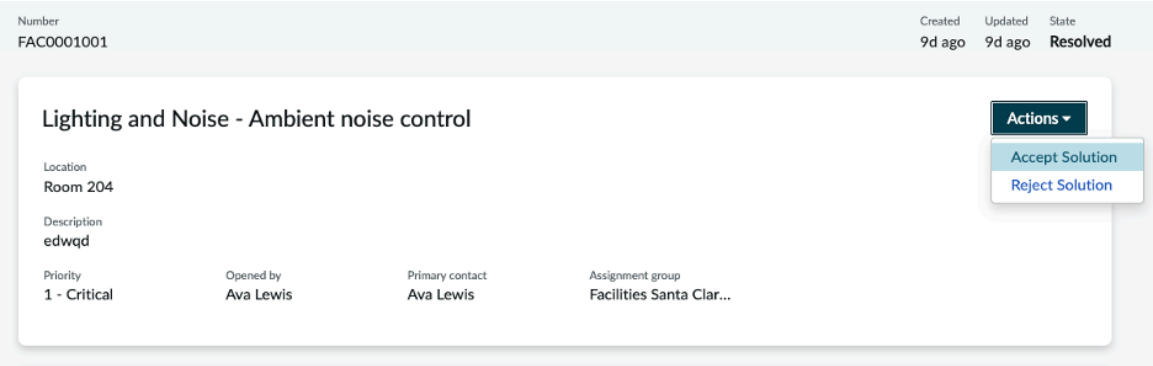
Comment synchronization



Comments on the Healthcare Facilities case are viewable on the work order. Comments in the Compose panel of the work order are viewable on the Healthcare Facilities case.

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State synchronization



The state of both the work order and the healthcare case remains in synchronization throughout the entire fulfillment process. Use the Care Team Portal to track your case state in real time through viewing case details in the portal.

Note:
In Care Team Operations for Facilities, case data only synchronizes with work orders and doesn't synchronize with work order tasks. Only updates made to the work order affect the associated case data.

Configuring Care Team Operations for Facilities

Set up the Care Team Operations for Facilities application.

Configuration overview

1. Install Care Team Operations for Facilities

   Install the Care Team Operations for Facilities application [sn_cto_facilities] if you have the admin role.

2. Set up work order synchronization in Care Team Operations for Facilities

   The Field Service Management [com.snc.work_management] plugin is required for work order synchronization to function with Care Team Operations for Facilities.

3. Set up roles for Care Team Operations for Facilities

   Ensure that the appropriate roles are assigned to users of Care Team Operations for Facilities.

4. Create healthcare organizations for your healthcare facilities support teams

   Create a healthcare organization to represent the fulfilling healthcare organization for healthcare facilities cases.

5. Create a group for all location support agents in Care Team Operations for Facilities

   Create a group for location support agents with the sn_cto_facilities.loc_support_agent role assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Facilities

6. Create a group for all location managers in Care Team Operations for Facilities

   Create a group for location managers with the sn_customerservice.svc_location_manager assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Facilities.

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7. Set up assignment groups for Care Team Operations for Facilities

   Associate assignment groups with your healthcare organizations to determine which user groups are associated with specific healthcare organizations.

8. Modify state decision tables in Care Team Operations for Facilities

   Use Decision Builder to change the state mappings for cases and incidents work orders in Care Team Operations for Facilities.

9. Add custom record producers to the service catalog in Care Team Operations for Facilities

   Add custom record producers you've configured into service catalogs in Care Team Operations for Facilities.

Install Care Team Operations for Facilities

Install the Care Team Operations for Facilities application [sn_cto_facilities] if you have the admin role.

Before you begin
Role required: admin

About this task
The application includes demo data for Care Team Operations for Facilities and installs related applications and plugins if they aren't already installed.

Note:
The Care Team Operations for Facilities application is dependent on the Healthcare Operations Core application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Care Team Operations for Facilities application [sn_cto_facilities] using the filter criteria and search bar.
   You can search for the application by its name or ID. If you can't 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**.

Set up work order synchronization in Care Team Operations for Facilities

The Field Service Management [com.snc.work_management] plugin is required for work order synchronization to function with Care Team Operations for Facilities.

For Care Team Operations for Facilities to create work orders from Healthcare Facilities cases, the Field Service Management [com.snc.work_management] plugin must be installed.

This plugin provides all roles and features needed for the healthcare facilities case to synchronize with work orders.

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For information on fulfilling work orders, see Manage work orders.

If the Field Service Management [com.snc.work_management] plugin isn't installed:

Work orders aren't created from healthcare facilities cases. Instead, agents work on fulfilling those cases directly from their portals.

Cases created are assigned to assignment groups based on the requesting location associations and are configured normally with CSM case management functionality.

Set up assignment groups for Care Team Operations for Facilities

Associate assignment groups within your healthcare facilities organizations so work orders can be fulfilled.

Before you begin

Role required: admin

About this task

In Care Team Operations for Facilities, assignment groups must be configured so that work orders created from facilities cases can be fulfilled.

Important:

The various steps of fulfilling work orders require that assignment groups be created as follows:

- **Facilities qualifier:** To set up facilities.qualifier roles, you must be assigned the Facilities Qualifier group, which contains the sn_cto_facilities.loc_support_agent role and the wm_qualifier roles.
- **Facilities dispatch:** To set up facilities dispatch roles, you must be assigned the Facilities Dispatcher group, which contains the wm_dispatcher and sn_cto_facilities.loc_support_agent roles.

> **Note:**
> In Agent assignment groups, the Covered by Dispatch Groups tab must be used to indicate which groups can fulfill for them.

For both of the preceding roles, the **Locations Covered** related list displays all locations these you can qualify or dispatch for.

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations**.
2. Select the healthcare organization that you want to associate an assignment group with.
3. In the Assignment Groups related list, select **New**.
4. On the Service Organization Assignment Group form, fill in the fields.

Service Organization Assignment Group form:

Field	Description
Service organization	Auto-populated with the name of the healthcare organization to which you're adding an assignment group.

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Assignment group	Name of the assignment group that is to be added.

5. Select **Submit**.

Setting up roles and responsibilities in Care Team Operations for Facilities

To manage access effectively in Care Team Operations for Facilities, first understand how roles and responsibilities work together. These concepts build on the Service Model Foundation (SMF) but are adapted for Healthcare Operations-specific use cases.

To understand how roles and responsibilities function in Healthcare Operations, see Setting up roles and responsibilities for Healthcare Operations users.

The following roles and responsibilities are included with Care Team Operations for Facilities:

Care Team Operations for Facilities roles and responsibilities

Role	Responsibility	Description
sn_cto_facilities.loc_support_agent	Support Department Agent Inherits Location Support Agent responsibility from Service Model Foundation.	Can view/resolve all cases under their assignment group, tracks, and fulfill cases.

What to do next

1. Set up roles for Care Team Operations for Facilities
2. Assign responsibilities to Care Team Operations for Facilities users

Set up roles for Care Team Operations for Facilities

Confirm that the appropriate roles are assigned to users of Care Team Operations for Facilities.

Before you begin
Role required: admin

About this task
Roles control access to features, capabilities, and data in the Care Team Operations for Facilities application.

You can assign roles to individual users or groups. When you apply roles to groups, the members of those groups inherit those roles.

Note:
User roles can be configured during the initial setup process for healthcare organizations. or at any time thereafter as needed.

Roles installed with Care Team Operations for Facilities

sn_cto_facilities.viewer	Facilities case viewer	Can view Healthcare Facilities cases and all HCLS foundation data.

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Roles installed with Care Team Operations for Facilities (continued)

		Note: If view access to work orders is needed, this role can contain the wm_read role.

Example:

A user who must fulfill work orders created from the Care Team Portal using Care Team Operations for Facilities should be assigned the sn_cto_facilities.loc_support_agent role.

Procedure

1. Navigate to **All** > **User Administration** > **Users** then open a user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**.
4. Select **Save**.

Assign responsibilities to Care Team Operations for Facilities users

Assign responsibilities to users in Care Team Operations for Facilities to dictate which specific records users are authorized to view or modify.

Before you begin
Role required: admin

About this task
You can edit the responsibilities of Care Team Operations for Facilities users when adding or removing members from your healthcare organizations, or at any time as needed.

Responsibility	Role
Support Department Agent	sn_cto_facilities.loc_support_agent

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **All**.
2. Select the parent organization.
3. Navigate to the **Members** related list.
4. Select **Edit members**.
5. In **Responsibility**, select the intended responsibility for the user.
6. Use the arrows between the **Available** and **Selected** panels to add the member.

Note:

If a newly added user isn't populated in the Available list, search for them manually using the lookup icon.

On occasion, newly added members don't appear within the Selected panel due to property configurations. If this occurs, see Configure global system properties to edit members in Healthcare Operations Core.

7. Select **Save**.

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Create healthcare organizations for your healthcare facilities support teams

Create a healthcare organization to represent the fulfilling healthcare organization for facilities cases.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **Hospital Departments**.
2. Select **New**.
3. In the name field, enter a name that reflects your facilities support organization. For example, Facilities Support.
4. Fill in the other fields as needed.
5. Select **Submit**.

What to do next
Assign members to your newly created healthcare facilities support organization.

Create a group for all location support agents in Care Team Operations for Facilities

Create a group for location support agents with the **sn_cto_facilities.loc_support_agent** role assigned so that users added to this group inherits the collection of roles for Care Team Operations for Facilities.

Before you begin
Role required: admin

About this task
The location support agent role will only give healthcare organization members the ability to view facilities cases associated with their healthcare organization.

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Select **Edit**.
7. Add the **sn_cto_facilities.loc_support_agent** role into the Roles List.
8. Select **Save**.

Result
A user group is created for your location support agents to which you can assign your facilities fulfillers when doing automated user imports.

Create a group for all location managers in Care Team Operations for Facilities

Create a group for location managers with the **sn_customerservice.svc_location_manager** role assigned so that users added to this group inherits the collection of roles for Care Team Operations for Facilities.

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Before you begin
Role required: admin

About this task
If you don't have existing groups already created for your facilities location managers, you can create a group to associate users to this role. You can also assign this role to users individually.

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Select **Edit**.
7. Add the **sn_customerservice.svc_location_manager** and **sn_cto_facilities.loc_support_agent** roles into the Roles list.
8. Select **Save**.

Result
A user group has been created for your facilities department location managers.

Modify state decision tables in Care Team Operations for Facilities

Use Decision Builder to change the state mappings for cases and incidents work orders in Care Team Operations for Facilities.

The Healthcare Facilities case state sync map displays all current mappings between Healthcare Facilities case and work order states.

To modify these state mappings, see Modify decision table structure in Workflow Studio.

To learn more about decisions tables, see Edit decision tables using draft authoring and Use decision tables.

The source table aligns with the input state and the destination table aligns with the output state.

These values can be found in the Dictionary Entry for the State field.

Healthcare Facilities case state default values

Label	Value
Canceled	7
Open	10
Closed	3
Awaiting info	18
New	1
Work in Progress	2
Resolved	6

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Work Order state default values

Label	Value	Sequence
Canceled	7	10
Assigned	16	6
Awaiting Approval	11	1
Draft	1	0
Closed Incomplete	4	9
Qualified	10	4
Closed Complete	3	8
Awaiting Qualification	15	3
Scheduled	12	5
Approved	13	2
Work in Progress	18	7

Add custom record producers to the service catalog in Care Team Operations for Facilities

Add custom record producers that you've configured into service catalogs in Care Team Operations for Facilities.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Record Producers**.
2. Select **New**.
3. Set the table name to **Healthcare Facilities Case [sn_cto_facilities_case]**.
4. In the Accessibility tab, set Catalogs to **Facilities service**.
5. Set the Category field to the desired service category.
6. Add in the following common variable sets.
7. Add in the following catalog client scripts.
8. Fill in other fields as needed.
9. Select **Save**.

Result
You have created a custom record producer for use with Care Team Operations for Facilities.

Creating service requests in Care Team Operations for Facilities

Use Care Team Operations for Facilities to report Facilities issues using Care Team Portal.

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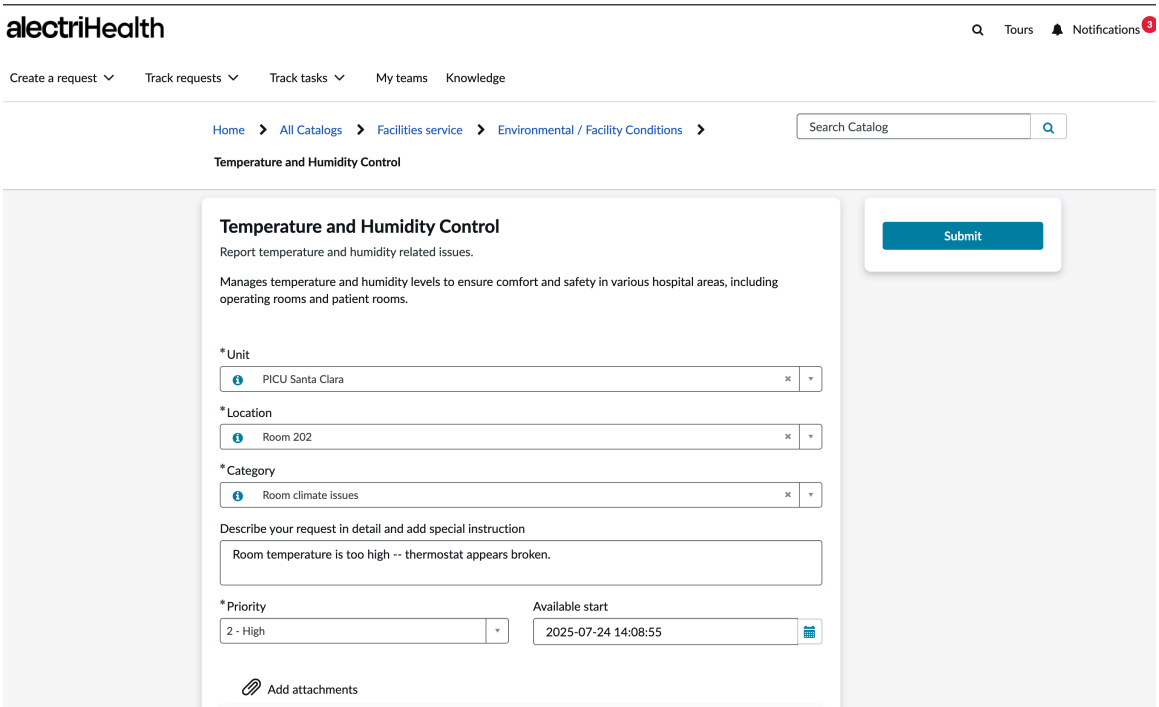
Create a facilities support request using Care Team Portal

Use the Care Team Portal to create a facilities support request.

Before you begin

Role required: sn_hco.care_team_member

About this task



Care Team Operations for Facilities comes with preconfigured service requests for facilities support departments.

Select the catalog item that aligns with your request type. Within the support request itself, use the Category field to specify the exact request category.

For example, a nurse who notices an issue with the temperature level in a room would navigate to **Create a request > Request Facilities service > Temperature and Humidity Control** and in the support request, set **Category** to **Room climate issues**.

For detailed information on the Facilities service catalog, see Service Catalog installed with Care Team Operations for Facilities.

Procedure

1. In the Care Team Portal, navigate to **Create a request** > **Request facilities service**.
2. Choose the appropriate catalog item for your support request.
3. In the form that appears, fill in fields as needed.

Field	Description
Unit	The unit associated with the request.
Location	The healthcare location in which facilities support is needed.
Category	The category of this request. For a detailed list of categories, see Service Catalog installed with Care Team Operations for Facilities.

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Field	Description
Description	Optionally, enter a description of the issue to assist the support agent.
Priority	The priority of the issue. Options are: ○ 1 - Critical ○ 2 - High ○ 3 - Moderate ○ 4. Low
Available start	The day and time in which support can attempt to resolve the issue.

4. **Optional:** Add attachments as needed.
5. Select **Submit**.

Fulfilling service requests in Care Team Operations for Facilities

Healthcare Facilities cases can be fulfilled one of two ways, depending on what plugin you have installed.

For Care Team Operations for Facilities to create work orders from Healthcare Facilities cases, the Field Service Management [com.snc.work_management] plugin must be installed.

This plugin provides all roles and features needed for the healthcare facilities case to synchronize to work orders.

For information on fulfilling work orders, see Manage work orders.

If the Field Service Management [com.snc.work_management] plugin isn't installed:

Work orders aren't created from healthcare facilities cases. Instead, agents work on fulfilling those cases directly from Workspace.

Cases created are assigned to assignment groups based on the requesting location associations and are configured normally.

For information on fulfilling cases, see Manage cases in Customer Service Management.

Care Team Operations for Facilities reference

Reference topics provide additional information about Care Team Operations for Facilities components.

Components installed with Care Team Operations for Facilities

Several types of components such as tables, user roles, and business rules are installed when you activate the Care Team Operations for Facilities plugin.

Tables installed with Care Team Operations for Facilities

Table name	Description
Healthcare Facilities case [sn_cto_facilities_case]	Abstract case type that provides a foundation to extend from when building your own operational request types.

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Roles installed with Care Team Operations for Facilities

sn_cto_facilities.admin	Admin	Configures organizations and team structure for Care Team Operations for Facilities.
sn_cto_facilities.viewer	Case viewer	Can view Healthcare Facilities cases and all HCLS foundation data.
sn_cto_facilities.loc_support_agent	Facilities support agent	Can view/resolve all cases under their assignment group, track cases, and fulfill cases.
sn_cto_facilities.loc_contributor	Location contributor role	Can report cases, respond to cases, track cases at the business location, and view cases under their team. **Note:** This role is automatically inherited into the Care Team Member role when the Care Team Operations for Facilities plugin is installed.

Plugins installed with Care Team Operations for Facilities

Plugin name	Description
Care Team Portal(com.sn_cto_sp)	Provides a portal experience for Care Team Operations for Facilities users to create requests for supporting departments, manage teams, and gain visibility into submitted requests.
Healthcare Operations Core[com.sn_hco]	Healthcare Operations Core provides clinicians with an uniform interface to report and track issues related to their day-to-day operations. This helps hospitals eliminate inefficient manual processes, reduce patient safety risks and increase patient satisfaction through timely resolution of issues and completion of important tasks.

Care Team Operations for Facilities data model tables

The Healthcare Facilities Case **[sn_cto_facilities_case]** enables streamlined support for environmental services support use cases.

It extends the Healthcare Operations Core **[sn_hco_case]** case.

Field	Description
Number	The case number for this Healthcare Facilities case. Generated automatically when created.
Short description	Brief description of the issue.
Description	Description of the issue.
Category	The type of service.
Healthcare location	Healthcare location where the issue is being reported.

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Field	Description
Location	Common location mapped to the healthcare location.
State	The current state of the Healthcare Facilities case. Synchronizes with the associated work order automatically when the Field Service Management plugin is installed.
Priority	Sequence in which the case should be resolved.
Urgency	Speed at which the case should be resolved.
Impact	Level of disruption caused. Indicates the size of the issue.
Opened by	The user who submitted the case.
Primary contact	The user for whom the case is created.
Assignment group	The assignment group of the user that fulfills and resolved the request/issue.
Assigned to	The user that fulfills and resolves the request/issue.
Requesting organization	The service organization of the requester.
Supporting organization	The service organization that fulfills the case/request.
Service	Service definition linked to the case.

Service Catalog installed with Care Team Operations for Facilities

The Care Team Operations for Facilities service catalog is organized into a hierarchy of Facilities-related categories and subcategories that clinicians commonly report.

This framework is specific to Facilities Management, focusing on the physical environment, building systems, and related infrastructure.

Service Categories

Name	Description
Emergency preparedness	Requests for developing and updating emergency plans, conducting drills, and training staff on emergency procedures.
Environmental/ Facility Conditions	Requests for repairs, routine maintenance, and inspections to confirm the physical state of buildings and grounds meets standards.
Safety and Security	Requests for installation and maintenance of surveillance systems, access control systems, and emergency response planning.
Utilities and building infrastructure	Requests for maintenance and management of essential services such as electricity, water, HVAC systems, and communication networks.

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Catalog items

Catalog Item/Service Definition	Short Description	Description
Temperature and Humidity Control	Report temperature and humidity-related issues.	Manages temperature and humidity levels to confirm comfort and safety in various hospital areas, including operating rooms and patient rooms. Case categories: • Humidity Management - Excess humidity or condensation in sensitive areas. Dehumidifier or humidifier malfunctions. • Room Climate Issues - Operating rooms, patient rooms, and labs being too warm or cold. Heat distribution problems.
Ventilation and Air Quality	Report HVAC and air quality issues.	Ensures efficient HVAC systems for proper air exchange and maintains indoor air quality by addressing odors and filter maintenance. Case categories: • HVAC System Efficiency - Inadequate air exchanges in patient-care areas. Inconsistent airflow or stagnant zones. • Indoor Air Quality Concerns - Persistent odors or musty smells indicating possible mold. Filter maintenance schedules not followed.
Lighting and Noise	Report lighting and ambient noise-related issues.	Addresses lighting standards and controls ambient noise to maintain a suitable environment for patients and staff. Case categories: • Illumination Standards - Inadequate or flickering lights in clinical or public areas. Insufficient lighting in hallways or emergency exits • Ambient Noise Control- Loud HVAC systems, mechanical equipment, or ongoing construction. Acoustic issues in patient rooms.
Water Supply and Plumbing	Report water leaks, temperature, and pressure-related issues.	Manages water pressure and temperature, repairs leaks, and drains to confirm reliable water supply and prevent flooding. Case categories:

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Catalog items (continued)

Catalog Item/Service Definition	Short Description	Description
		• Water Pressure and Temperature - Inconsistent hot water in patient showers or hand washing sinks. Sudden drops in water pressure. • Leaks and Drains - Dripping faucets, burst pipes, or water intrusion in ceilings/ walls. Clogged drains causing localized flooding.
Slip, Trip, and Fall Hazards	Report floor and surface cracks, warps, and other moisture-related risks.	Enhances floor and surface integrity to prevent accidents caused by cracked tiles, warped floorboards, and moisture-related risks. Case categories: • Floor and Surface Integrity - Cracked tiles, warped floorboards, loose carpeting. Uneven thresholds between rooms or corridors • Moisture-Related Risks - Water leaks leading to slippery floors. Condensation in high-humidity areas
Fire Safety and Evacuation Readiness	Report fire protection and evacuation pathway-related issues.	Maintains fire protection systems and evacuation pathways to confirm readiness in case of emergencies. Case categories: • Fire Protection Systems - Non-functioning fire alarms, detectors, or sprinkler heads. Expired or missing fire extinguishers. • Evacuation Pathways - Blocked or improperly labeled fire exits. Damaged or missing directional signage.
Access Control	Report door, lock, and physical barrier-related issues.	Ensures door and lock maintenance and secures physical barriers and perimeters to control access to restricted areas. Case categories: • Door and Lock Maintenance - Faulty door hardware (e.g., hinges, latches). Broken badge readers for restricted areas. • Physical Barriers and Perimeters - Gaps in fencing or perimeter walls. Unsecured windows or roof access points.

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Catalog items (continued)

Catalog Item/Service Definition	Short Description	Description
Power Supply and Electrical Systems	Report circuit overloads, breaker trips, and outlet-related issues.	Manages circuit overloads, breaker trips, and maintains outlets and fixtures to confirm reliable electrical systems. Case categories: • Circuit Overloads / Breaker Trips - Repeated breaker trips indicating overloaded circuits; Faulty or outdated wiring posing fire hazards. • Outlets and Fixtures - Damaged or loose wall outlets. Malfunctioning light switches or corridor lighting panels.
Elevator Functionality	Report elevator reliability and safety related issues.	Ensures mechanical reliability and safety features of elevators to provide secure and efficient transport within the hospital. Case categories: • Mechanical Reliability - Frequent malfunctions, doors jamming, or misalignments with floors. Overheating motors or delayed response times. • Safety Features - Emergency call buttons not functioning. Faulty or outdated braking systems.
Building-Wide Systems	Report heating, cooling, compressed air, and vacuum system-related issues	Maintains heating, cooling, compressed air, and vacuum systems to confirm consistent and efficient building operations. Case categories: • Heating and Cooling (Boilers, Chillers) - Inconsistent hot water supply from boiler system. Chiller unit leaks or insufficient cooling capacity. • Compressed Air and Vacuum Systems - Poor line pressure affecting clinical utilities. Leaks or pressure fluctuations in piping.
Generators and Backup Power	Report issues related to generator and backup power system reliability.	Ensures that generators and backup power systems are maintained and tested for reliability during power outages. Case categories: • Maintenance and Testing - Inconsistent testing schedules or poor maintenance logs. Fuel supply or battery issues preventing startup.

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Catalog items (continued)

Catalog Item/Service Definition	Short Description	Description
		• Transfer Switches - Slow or failed switchovers to backup power. Malfunctioning automatic transfer switches (ATS).
Physical Disaster Readiness	Implements weather-related protections and flood control measures to safeguard the hospital against natural disasters.	Request weather-related protections. Case categories: • Weather-Related Protections - Roof, windows, and external structures not reinforced for storms. Unsecured building features (signage, awnings). • Flood and Water Intrusion Control - Inadequate sump pumps or drainage systems. Vulnerable basement or sub-level areas prone to flooding.

Care Team Operations for Healthcare IT

Care Team Operations for Healthcare IT contains the case types to report and fulfill healthcare IT issues.

Get started

Explore	Configure	Request
		
Learn about how care teams use Care Team Operations for Healthcare IT.	Plan and configure your implementation.	Submit support requests for healthcare IT issues.

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Resolve	Reference	
		
Resolve incidents created from Healthcare IT cases.	Get details on components like fields, tables, and properties.	

Troubleshoot and get help

- Ask questions and explore other resources for in the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Care Team Operations for Healthcare IT

Learn how you can use the Care Team Operations for Healthcare IT application to support your care team in resolving IT issues quickly and efficiently.

Care Team Operations for Healthcare IT overview

Care Team Operations for Healthcare IT contains the case types to report and fulfill IT issues in hospitals.

Care Team Operations for Healthcare IT provides care teams with a streamlined platform to report EMR or other IT issues. Using the Care Team portal, care team members can raise an issue with the Healthcare IT case type. An incident is then automatically created from this case, which service agents in the IT department then manage using the Service Operations workspace asCt they fix the issue. There are two types of service requests available with Care Team Operations for Healthcare IT:

- Report an EMR Issue
- Request other IT service

Note:
Care Team Operations for Healthcare IT requires installation of the Healthcare Operations Core and Care Team Portal plugins.

Care Team Operations for Healthcare IT users

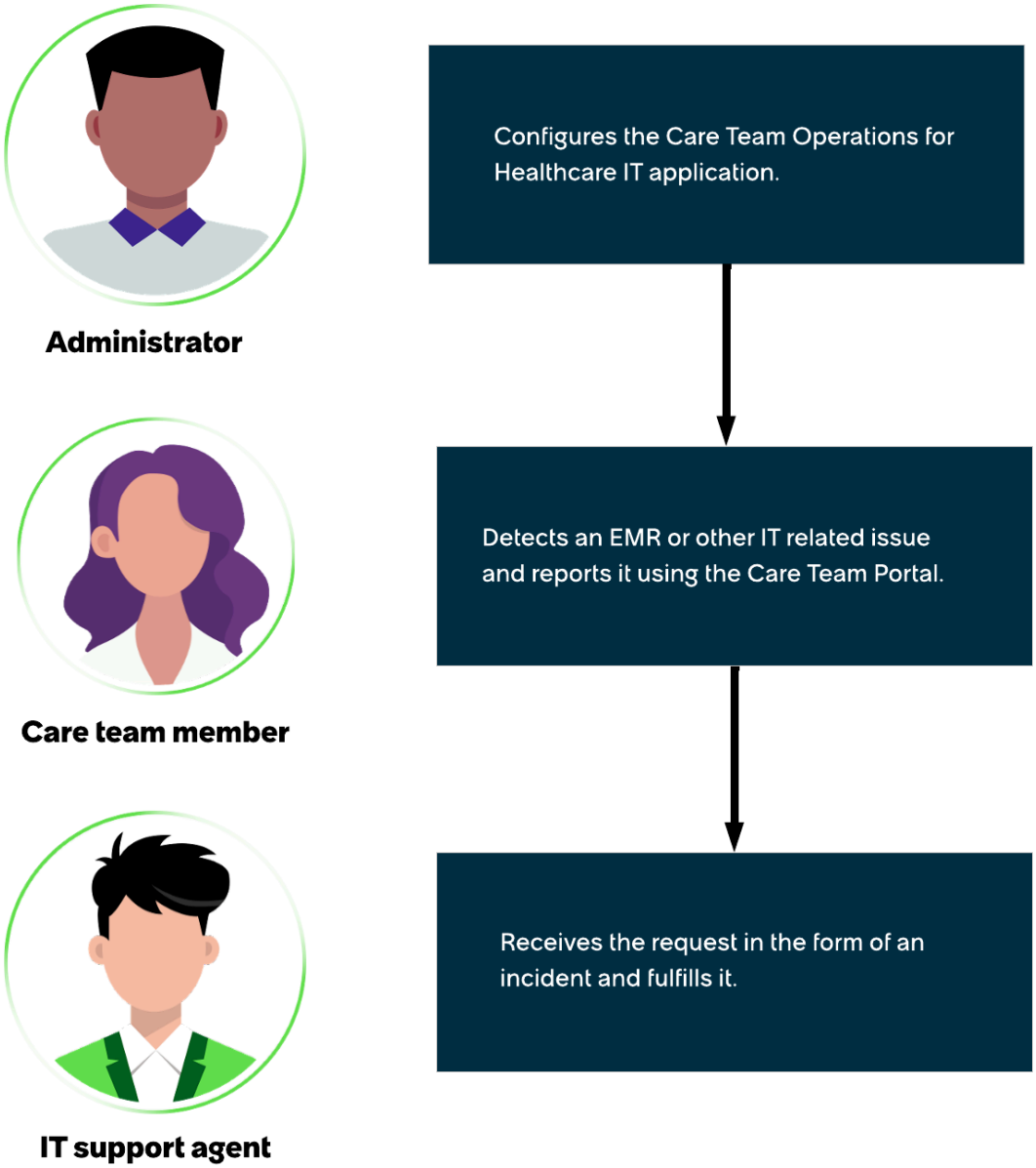
User	Description
Nurse assistant	Nurse assistants provide basic care to patients in healthcare facilities, assisting with daily living, monitoring patient health, and providing vital support to nurses and medical staff.
Registered Nurse	Registered nurses are responsible for providing and coordinating patient care, educating patients and their families about various health concerns, administering medications

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User	Description
	and treatments, and collaborating with other healthcare professionals to develop and implement care plans.
Unit Manager	Unit Managers oversee the operations of a specific unit within a healthcare facility, supervise staff, manage resources, and confirm the delivery of high-quality patient care.
Unit Secretary	Unit secretaries provide administrative support to nursing units and facilitate communication between staff, patients, and families while maintaining patient records.
IT Agent	IT agents create, view, edit, and fulfill service requests created by the care team on behalf of the hospital's IT department.
IT Agent Manager	IT Agent Managers oversee the IT department agents and ensure that requests are fulfilled in an effective and timely manner.

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Care Team Operations for Healthcare IT workflow



1. An administrator configures the Care Team Operations for Healthcare IT application.
2. A care team member detects an EMR or other IT issue and reports it using the Care Team Portal.
3. An IT support agent receives the request in the form an incident and fulfills it.

Care Team Operations for Healthcare IT benefits

Benefit	Feature	Users
Automate healthcare operations by enabling IT support request creation and fulfillment.	Healthcare IT case overview	Admin

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Benefit	Feature	Users
Receive visibility to all IT service requests created by your teams.	Creating service requests in Care Team Operations for Healthcare IT	Care Team
Use Workspace to fulfill IT service requests.	Fulfilling service requests in Care Team Operations for Healthcare IT	Agent

What to explore next

To learn more about configuring and using Care Team Operations for Healthcare IT, see:

- Configuring Care Team Operations for Healthcare IT
- Creating service requests in Care Team Operations for Healthcare IT
- Fulfilling service requests in Care Team Operations for Healthcare IT
- Care Team Operations for Healthcare IT reference

Healthcare IT case overview

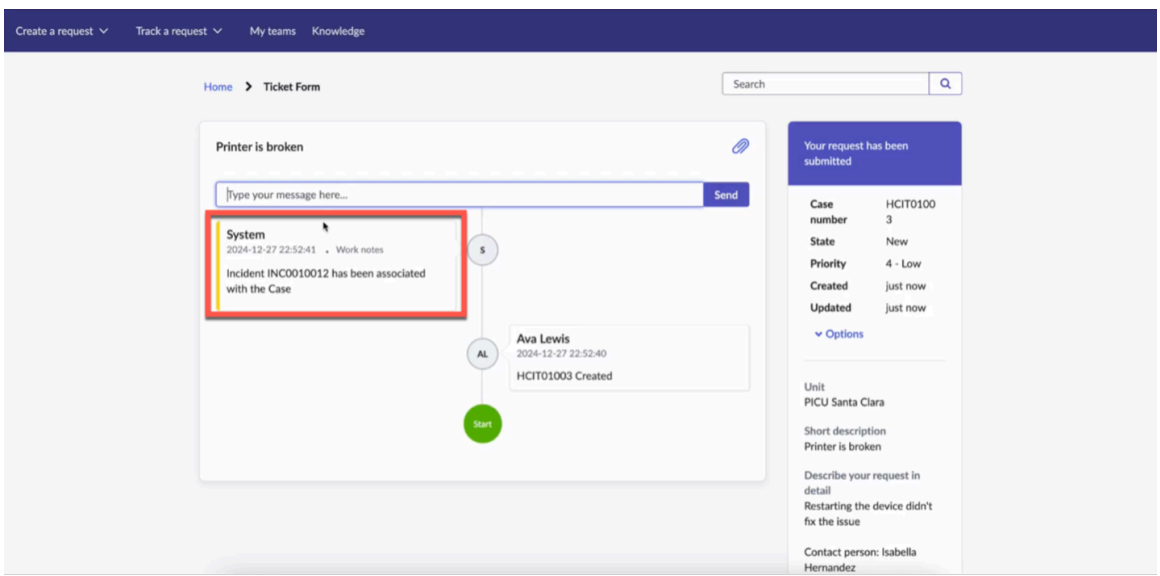
Use the Healthcare IT case to create case types for IT-related healthcare operational requests.

By associating these cases with specific healthcare organizations, care team members can easily view all cases created for their team, unit, or organization.

Healthcare IT cases automatically generate related incidents for ITIL fulfillers to handle. These incidents are assigned to supporting agents with the fulfiller role.

Any updates, comments, or status changes made to the incident are reflected in the case, and vice versa. When an incident is linked to a case, the fulfiller needs only manage the incident and the case will automatically update to reflect these changes.

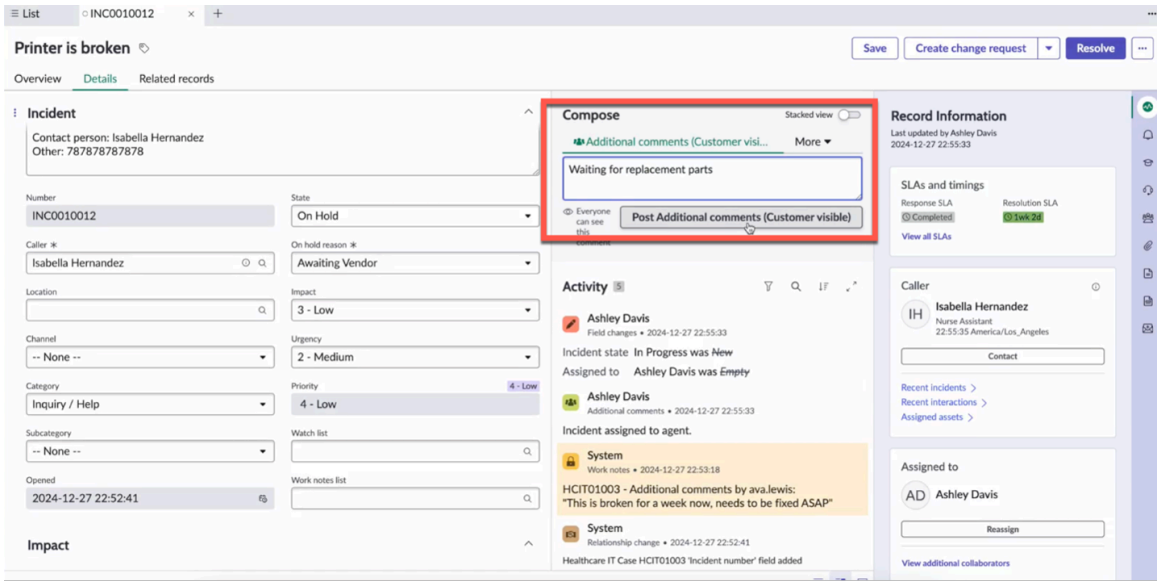
Incident auto-creation



Incidents are created automatically in synchronization with Healthcare IT cases. All information from the Healthcare case is carried over into the incident.

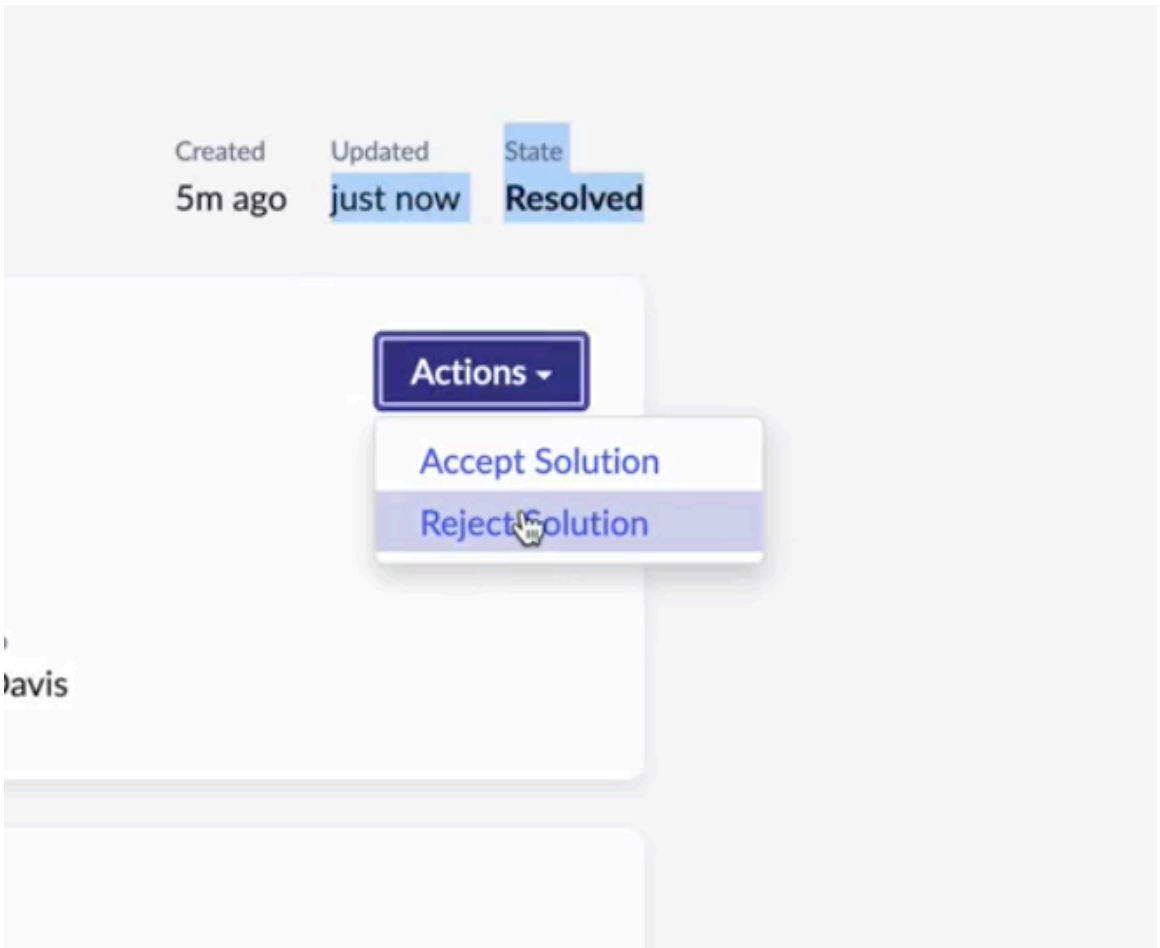
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Comment synchronization



Comments left on the Healthcare IT case are viewable on the incident, and comments left in the **Compose** panel of the Incident are viewable on the Healthcare IT case.

State synchronization



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The state of both the incident and the healthcare case remains in synchronization throughout the entire fulfillment process. Use the Care Team Portal to track your case state in real time through viewing case details.

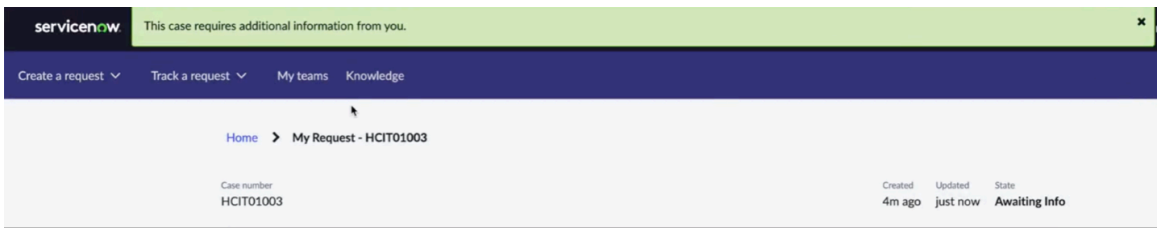
Accepting or rejecting a solution

If a requesting party selects Accept Solution, the case and incident both enter a closed state.

If a requesting party selects Reject Solution, the state returns to Work in progress on both the incident and the case.

On hold cases

In cases where an incident is set to **On hold** by the support agent with a reason state set to **Awaiting Caller**, additional information is required from the requester for the agent to proceed.



This triggers an alert on the case in the Care Team Portal, where the state is changed to **Awaiting info**.

Configuring Care Team Operations for Healthcare IT

The following setup steps need to occur before using Care Team Operations for Healthcare IT.

Configuration overview

1. Install Care Team Operations for Healthcare IT

   You can install the Care Team Operations for Healthcare IT application (sn_cto_hcit) if you have the admin role.

2. Assign roles to Care Team Operations for Healthcare IT users

   Ensure that the correct roles are assigned to users of Care Team Operations for Healthcare IT.

3. Create healthcare organizations for your healthcare IT support teams

   Create healthcare organizations to represent your fulfilling organizations for Healthcare IT cases.

4. Create a group for all location support agents in Care Team Operations for Healthcare IT

   Create a group for location support agents with the sn_cto_hcit.loc_support_agent assigned so that users added to this group inherits the collection of roles for Care Team Operations for Healthcare IT.

5. Create a group for all location managers in Care Team Operations for Healthcare IT

   Create a group for location managers with the sn_customerservice.svc_location_manager assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Healthcare IT.

6. Set up assignment groups for Care Team Operations for Healthcare IT

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Associate assignment groups with your healthcare organizations to ensure cases are assigned to the correct healthcare organizations.

7. Modify state decision tables in Care Team Operations for Healthcare IT

   Use Decision Builder to change the state mappings for cases and incidents in Care Team Operations for Healthcare IT.

Install Care Team Operations for Healthcare IT

Install the Care Team Operations for Healthcare IT application [sn_cto_hcit] if you have the admin role.

Before you begin
Role required: admin

About this task
The application includes demo data for Care Team Operations for Healthcare IT and installs related applications and plugins if they are not already installed.

> **Note:**
> The Care Team Operations for Healthcare IT application is dependent on the Healthcare Operations Core application.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Care Team Operations for IT application [sn_cto_hcit] 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**.

Setting up roles and responsibilities in Care Team Operations for Healthcare IT

To manage access effectively in Care Team Operations for Healthcare IT, first understand how roles and responsibilities work together. These concepts build on the Service Model Foundation (SMF) but are adapted for Healthcare Operations-specific use cases.

To understand how roles and responsibilities function in Healthcare Operations, see Setting up roles and responsibilities for Healthcare Operations users.

The following roles and responsibilities are included with Care Team Operations for Healthcare IT:

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Care Team Operations for Healthcare IT roles and responsibilities

Role	Responsibility	Description
sn_cto_hcit.loc_support_agent	Support Department Agent Inherits Location Support Agent responsibility from Service Model Foundation.	Can view/resolve all cases under their assignment group, tracks, and fulfill cases.

What to do next

1. Assign roles to Care Team Operations for Healthcare IT users
2. Assign responsibilities to Care Team Operations for Healthcare IT users

Assign roles to Care Team Operations for Healthcare IT users

Ensure that the correct roles are assigned to users of Care Team Operations for Healthcare IT.

Before you begin
Role required: admin

About this task
Roles control access to features, capabilities, and data in the Care Team Operations application.

You can assign roles to individual users or groups. When you apply roles to groups, the members of those groups inherit those roles.

Note:
User roles can be configured during the initial set up process for healthcare organizations or at any time thereafter as needed.

Roles installed with Care Team Operations for Healthcare IT

sn_cto_hcit.loc_support_agent	IT Support Agent	Views/resolves all cases under their assignment group. Tracks and fulfills cases.

Example:

A user who needs to fulfill incidents created from the Care Team Portal using the Care Team Operations for Healthcare IT plugin would need to be assigned the sn_cto_hcit.loc_support_agent role.

Note:
After installing Care Team Operations for Healthcare IT, the sn_hco.care_team_member role installed with Healthcare Operations Core will contain the sn_cto_hcit.loc_contributor role automatically.

Procedure

1. Navigate to **All** > **User Administration** > **Users**.
2. In the **Roles** related list, select **Edit**.

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3. In the **Collection** list, select the desired roles, and then select **Add**.
4. Select **Save**.

Assign responsibilities to Care Team Operations for Healthcare IT users

Assign responsibilities to users in Care Team Operations for Healthcare IT to dictate which specific records users are authorized to view or modify.

Before you begin
Role required: admin

About this task
You can edit the responsibilities of Care Team Operations for Healthcare IT users when adding or removing members from your healthcare organizations, or at any time as needed.

Responsibility	Role
Support Department Agent	sn_cto_hcit.loc_support_agent

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **All**.
2. Select the parent organization.
3. Navigate to the **Members** related list.
4. Select **Edit members**.
5. In **Responsibility**, select the intended responsibility for the user.
6. Use the arrows between the **Available** and **Selected** panels to add the member.

Note:

If a newly added user isn't populated in the Available list, search for them manually using the lookup icon.

On occasion, newly added members don't appear within the Selected panel due to property configurations. If this occurs, see Configure global system properties to edit members in Healthcare Operations Core.

7. Select **Save**.

Create healthcare organizations for your healthcare IT support teams

Create healthcare organizations to represent your fulfilling organizations for Healthcare IT cases.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **Hospital Departments**.
2. Select **New**.
3. In the name field, enter a name that reflects your healthcare IT support organization. For example, Healthcare IT.

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4. Fill in the other fields as needed.
5. Select **Submit**.

What to do next
Assign members to your newly created healthcare IT support organization.

Create a group for all location support agents in Care Team Operations for Healthcare IT

Create a group for location support agents with the sn_cto_hcit.loc_support_agent role assigned so that users added to this group inherits the collection of roles for Care Team Operations for Healthcare IT.

Before you begin
Role required: admin

About this task
The location support agent role gives healthcare organization members the ability to view only healthcare IT cases associated with their healthcare organization.

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Select **Edit**.
7. Add the **sn_cto_hcit.loc_support_agent** role into the Roles List.
8. Select **Save**.

Result
A user group is created for your location support agents to which you can assign your IT fulfillers when doing automated user imports.

Create a group for all location managers in Care Team Operations for Healthcare IT

Create a group for location managers with the sn_customerservice.svc_location_manager assigned so that users added to this group will inherit the collection of roles for Care Team Operations for Healthcare IT.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Click **Edit**.

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7. Add the the sn_customerservice.svc_location_manager and sn_cto_hcit.loc_support_agent roles into the Roles List.
8. Click **Save**.

Result
A user group has been created for your location managers.

Set up assignment groups for Care Team Operations for Healthcare IT

Associate assignment groups with your healthcare organizations to ensure cases are assigned to the correct healthcare organizations.

Before you begin
Role required: admin

About this task
Multiple assignment groups can be associated with a single healthcare organization.

In Care Team Operations for Healthcare IT, assignment groups must be configured so that incidents created from Healthcare IT cases can be fulfilled.

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations**.
2. Select the healthcare organization that you want to associate an assignment group with.
3. In the Assignment Groups related list, select **New**.
4. On the Service Organization Assignment Group form, fill in the fields.

   Service Organization Assignment Group form:

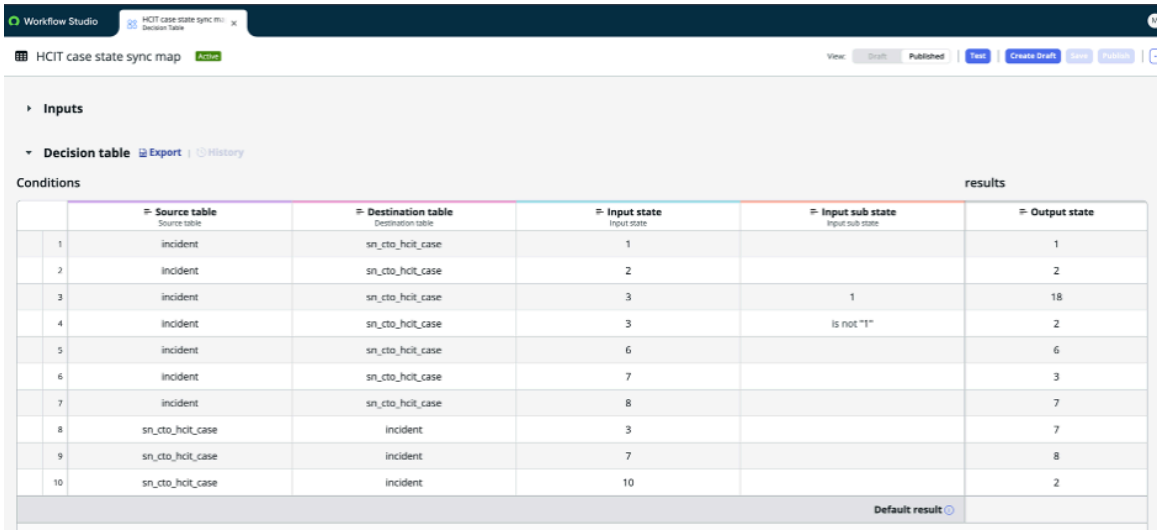
Field	Description
Service organization	Auto-populated with the name of the healthcare organization to which you're adding an assignment group.
Assignment group	Name of the assignment group that is to be added.

5. Select **Submit**.

Modify state decision tables in Care Team Operations for Healthcare IT

Use Decision Builder to change the state mappings for cases and incidents in Care Team Operations for Healthcare IT.

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The HCIT case state sync map displays all current mappings between Healthcare IT case and incident states.

To modify these state mappings, see Modify decision table structure in Workflow Studio.

To learn more about decisions tables, see Edit decision tables using draft authoring and Use decision tables.

The source table aligns with the input state and input sub state and the destination table aligns with the output state.

For example, when the incident state is changed to Closed (choice value 7), a lookup is performed using this decision table to ensure that the value in the destination IT case table is also set to Closed (choice value 3).

These values can be found in the Dictionary Entry for the State field.

Healthcare IT case state default values

Label	Value	Sequence
Open	10	3
Cancelled	7	8
Draft	0	-1
Awaiting info	18	4
Resolved	6	5
New	1	0
Closed	3	4

Incident state default values

Label	Value	Sequence
New	1	1
In Progress	2	2

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Label	Value	Sequence
On Hold	3	3
Resolved	6	6
Closed	7	7
Canceled	8	8

Add custom record producers to the service catalog in Care Team Operations for Healthcare IT

Add custom record producers you have configured into service catalogs in Care Team Operations for Healthcare IT.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Record Producers**.
2. Select **New**.
3. Set the table name to **Healthcare Facilities Case [sn_cto_facilities_case]**.
4. In the Accessibility tab, set Catalogs to **Facilities service**.
5. Set the Category field to the desired service category.
6. Add in the following common variable sets.
7. Recommended - Add in the following catalog client scripts.
8. Fill in other fields as needed.
9. Select **Save**.

Result
You have created a custom record producer for use with Care Team Operations for Healthcare IT.

Creating service requests in Care Team Operations for Healthcare IT

Use the Care Team Portal to report EMR or other IT issues to support teams for fulfillment.

- Report an EMR issue with Care Team Operations for IT

  Report any issue with your EMR system using the Report an EMR issue catalog item from the Care Team Operations portal.

- Request other IT service with Care Team Operations for IT

  Request IT service for non-EMR issues using the Request other IT service catalog item from the Care Team Portal.

Report an EMR issue with Care Team Operations for IT

Report any issue with your EMR system using the Report an EMR issue catalog item from the Care Team Operations portal.

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Before you begin
Role required: sn_hco.care_team_member

Procedure

1. In the Care Team Portal, navigate to **Create a request** > **Request IT service** > **Report an EMR issue**.
2. Fill in the following fields.

Field	Description
Unit	The unit in which the EMR having an issue is located.
Short description	A short summary of your issue.
Describe your request in detail	Add a detailed description of the issue occurring with the EMR. Provide as much relevant information as possible.
Urgency	The urgency of this issue. Options are: ○ 1 - High ○ 2 - Medium ○ 3 - Low
Contact person	The associated contact for this request.
Phone type	The phone type associated with the contact number. Options are: ○ Business ○ Mobile ○ Other
Contact number	The phone number of the associated contact for this request.

3. Select **Submit**.

Request other IT service with Care Team Operations for IT

Request IT service for non-EMR issues using the Request other IT service catalog item from the Care Team Portal.

Before you begin
Role required: sn_hco.care_team_member

Procedure

1. In the Care Team Portal, navigate to **Create a request** > **Request IT service** > **Request other IT service**.
2. Fill in the following fields.

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Field	Description
Unit	The unit associated with this IT request.
Asset model	The asset model of the device experiencing an IT issue.
Asset tag or serial number	The asset tag or serial numeric value associated with the device experiencing an IT issue.
Identified asset	
Short description	A short summary of your issue.
Describe your request in detail	Add a detailed description of the IT issue occurring. Provide as much relevant information as possible.
Urgency	The urgency of this issue. Options are: ○ 1 - High ○ 2 - Medium ○ 3 - Low
Contact person	The associated contact for this request.
Phone type	The phone type associated with the contact number. Options are: ○ Business ○ Mobile ○ Other
Contact number	The phone number of the associated contact for this request.

3. Select **Submit**.

Fulfilling service requests in Care Team Operations for Healthcare IT

Incidents created from Healthcare IT cases are resolved using standard IT Service Management incident management functionality in the Service Operations workspace.

For more information, see Incident Management.

Note:
Fulfillers should modify the Incident view Service Operations Workspace and add the related list **Case->Incident**.

This enables you to see the case associated with see the incident on the Service Operations Workspace under the Related Records section.

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Care Team Operations for Healthcare IT reference

Reference topics provide additional information about Care Team Operations for Healthcare IT components.

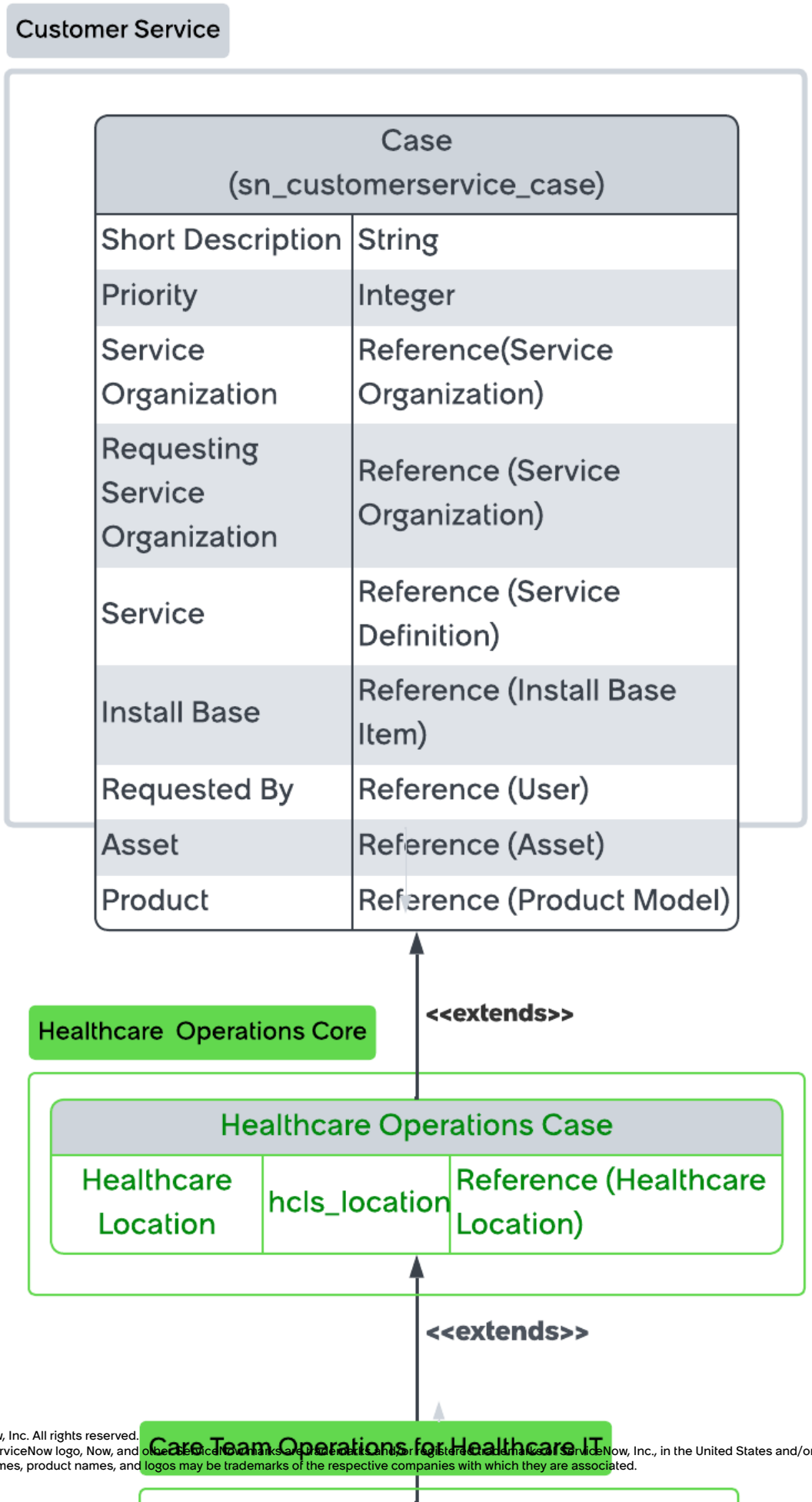
Care Team Operations for Healthcare IT data model

Learn about the#Care Team Operations for Healthcare IT#application by viewing the data model and role relationship diagrams.

These diagrams show the relationships between the tables within the application and provide an overall picture of how the#Care Team Operations for Healthcare IT#application operates.

The following diagram shows the tables and their relationships within the#Healthcare Operations for Healthcare IT#application.

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Care Team Operations for Healthcare IT case table

The Care Team Operations for Healthcare IT Case [sn_cto_hcit_case] enables streamlined support for operational healthcare IT use cases.

It extends the Healthcare Operations Core case table.

Field	Description
Case number	The case number for this healthcare IT case. Generated automatically upon creation.
Incident number	Generated automatically from the healthcare IT case.
Requesting organization	The organization associated with the requesting user.
Opened by	The user who created the healthcare IT request.
State	The current state of the healthcare IT case. Syncs with the incident automatically.
Supporting organization	The supporting organization responsible for the incident.
Assignment group	The assignment group designated for the fulfilment of the associated incident.
Assigned to	The user assigned to fulfill this incident.
Opened	Date and time healthcare case was opened.

Components installed with Care Team Operations for Healthcare IT

Several types of components such as tables, user roles, and business rules are installed when you activate the Care Team Operations plugin.

Note:
The Application Files table lists the components that are installed with this application. For instructions on how to access this table, see https://www.servicenow.com/docs/bundle/yokohama-platform-administration/page/administer/plugins/task/find-components.html.

Tables installed with Care Team Operations for Healthcare IT

Tables installed with Care Team Operations for Healthcare IT

Table name	Description
Care Team Operations for Healthcare IT case (sn_cto_hcit_case)	Abstract case type that provides a foundation to extend from when building your own operational request types.

Base roles installed with Care Team Operations for Healthcare IT

sn_cto_hcit.admin	IT Admin	IT Admin role for Care Team Operations for Healthcare IT.
sn_cto_hcit.loc_support_agent	IT Support Agent	Views/resolves all cases under their assignment group. Tracks and fulfills cases.

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sn_cto_hcit.viewer	IT Viewer	Views all IT and HCLS foundation data. **Note:** If users need access to incidents, the sn_incident_read role can be added to this role.
sn_cto_hcit.loc_contributor	CTO IT location contributor role	Reports cases, respond to cases, track cases at business location, views cases under their team. **Note:** This role is automatically inherited into the Care Team Member role when the Care Team Operations for Healthcare IT plugin is installed.

Plugins installed with Care Team Operations for Healthcare IT

Plugin name	Description
Care Team Portal (com.sn_cto_sp)	Provides a portal experience for Care Team Operations for Healthcare IT users to create requests for supporting departments, manage teams, and gain visibility into submitted requests.
Healthcare Operations Core [com.sn_hco]	Healthcare Operations Core provides clinicians an uniform interface to report and track issues related to their day-to-day operations. This helps hospitals eliminate inefficient manual processes, reduce patient safety risks and increase patient satisfaction through timely resolution of issues and completion of important tasks.

Care Team Work Management

Care Team Work Management streamlines operational task creation, assignment, and tracking for care team internal operations.

Get started

Explore	Configure	Use the Operational Rounding playbook
		
Learn about how care teams use Care Team Work Management to design and execute task plans for care teams.	Activate and set up Care Team Work Management.	Define the repeatable tasks and records that need to be created for care team work.

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Work on cases and tasks	Reference	
		
Work on cases and tasks generated from task plans.	Get details about components like fields, tables, and properties.	

Exploring Care Team Work Management

Care Team Work Management provides a structured way for hospitals to design, coordinate, and execute operational work across care teams. By standardizing how work is defined, assigned, and completed, it reduces administrative overhead, gives clinicians more time for patient care, and improves operational reliability and regulatory readiness.

Care Team Work Management overview

Task plans define the standardized steps care teams must complete for one-time or recurring operational activities that can span multiple departments or locations.

By authoring a task plan once, operational leaders ensure that each unit executes the same workflow consistently. Some examples of potential task plans include a daily readiness check, an infection control review, or a multi-unit audit.

Use the **Operational Rounding Playbook** to build structured rounding task plans that include required fields, checklists, and defined clinical or operational standards. These task plans can be tailored to individual units while remaining part of a broader multi-unit workflow. They support built-in scheduling for both one-time and recurring rounding activities.

The playbook automates the creation of all related work across units and organizations while supporting evidence capture, exception reporting, and progress tracking directly in the Healthcare Workspace.

Care Team Work Management users

Care Team Work Management users

User	Description
Care Team Agent	Care Team Agents use Care Team Work Management to create requests and fulfill tasks assigned to them.
Care Team Agent Manager	Care Team Agent Managers use Care Team Work Management to create requests and fulfill tasks assigned to them. They can also create work plans and track completion status.
Operational Leader	Operational leaders use Care Team Work Management to create multi#unit task plans and oversee operational execution.

Care Team Work Management workflow

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1. An administrator configures the Care Team Work Management application.
2. An operational leader creates a task plan composed of orchestration cases and tasks and care team cases and tasks for select units.
3. Units receive a care team case and assign it to a unit manager.
4. The unit manager assigns care team tasks from that case to members of their care team for fulfillment.
5. The operational leader tracks progress and confirms completion by completing the orchestration case.

Care Team Work Management benefits

Care Team Work Management benefits

Benefit	Feature	Users
Standardize and automate routine operational tasks.	Create a care team task plan using the Operational rounding playbook	Operational Leader
Improve visibility into operational performance at a unit level.	Track care team task plans	Operational Leader, Care Team Agent Manager
Fulfill cases and task created from task plans.	Fulfilling care team task plans	Care Team Agent, Care Team Agent Manager, Support Agents

What to explore next

To learn more about configuring and using Care Team Work Management, see:

- Configuring Care Team Work Management
- Create a care team task plan using the Operational rounding playbook
- Track care team task plans
- Fulfilling care team task plans
- Care Team Work Management reference

Healthcare orchestration cases and tasks

Healthcare orchestration cases and healthcare orchestration tasks are created to manage cross-unit oversight and coordination.

Healthcare orchestration case

A healthcare orchestration case represents a multi-unit plan, such as:

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- Joint Commission readiness rounds
- Quality and safety reviews
- Infection control audits
- Multi-unit operational assessments

It serves as the coordinating layer that brings together work occurring across multiple units into a single, managed initiative.

The healthcare orchestration case provides leadership with a centralized view of progress across all participating units, including visibility into exceptions, delays, or compliance gaps.

Healthcare orchestration task

While care teams execute unit-level tasks, leadership often has their own coordination work.

Healthcare orchestration tasks capture these responsibilities, such as:

- Reviewing submitted assessments
- Sending communications to impacted units
- Following up on documented issues
- Preparing evidence for regulatory review

These tasks help ensure that cross-unit activities can move forward smoothly without reliance on ad-hoc follow-up.

Care team cases and tasks

Care team cases group related operational work for a care team, while care team tasks represent the individual, actionable steps that users complete to fulfill that work.

Care team case

Care team cases are generated from task plans and have associated care team tasks.

The care team case [sn_cto_case] table contains cases pertaining to Care Team Work Management at the unit level.

Once a task plan is executed, the system generates care team cases and care team tasks for each impacted unit.

A care team task is the unit-level container for work. It includes:

- The unit's task list
- Required assessments or checklists
- Evidence capture fields
- Assignment details for the care team agent manager

Care team task

The care team task [sn_cto_task] table contains tasks attached to care team cases.

Care team tasks represent the hands-on work care team agents must complete, such as:

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- Conducting room or equipment checks
- Performing shift readiness steps
- Documenting safety concerns
- Completing Smart Assessments

Tasks are fulfilled in the Healthcare Operations Workspace.

Care team agent managers monitor progress and complete the case once all tasks are finished.

Example - Task plans for care teams

Understand how task plans are designed and executed using Care Team Work Management.

In a large hospital system, operational leaders need a reliable way to run across rounding activities consistently many departments without manually coordinating work unit by unit. The **Operational rounding playbook** is designed for this purpose, providing a standardized and repeatable workflow that initiates, coordinates, and tracks rounding activities across multiple care units.

When the task plan is executed, the system begins by creating one **healthcare orchestration case** that represents the entire rounding cycle across the hospital. This healthcare Orchestration case serves as the hospital-wide coordination record, allowing leadership to manage the effort as a single initiative regardless of how many units are involved.

As part of this orchestration layer, the system generates **healthcare orchestration tasks** for rounding coordinators and operational leaders. These tasks typically include activities such as preparing rounding checklists and communications, reviewing submitted assessments from all units, and compiling exceptions or escalating findings. These healthcare orchestration tasks are visible only to leadership roles and don't involve frontline staff, confirming that coordination and oversight remain separate from unit-level execution.

For each selected unit or department, the system then creates a **care team case**, providing a unit-specific container for frontline rounding work. Each care team case includes a clear description of the rounding activity and sets expectations for what must be completed during the rounding cycle. Within each care team case, the system generates **care team tasks** that guide unit-level execution, such as environmental assessments, equipment checks, and patient safety checklists. These tasks are assigned to care team managers or care team agents within the appropriate unit and may include documentation requirements or smart assessments as needed.

As care team staff complete their assigned tasks, progress is tracked at both the unit and hospital levels. Unit-level completion is captured within care team cases and tasks, while overall progress across all units is monitored from the healthcare orchestration case. This enables rounding coordinators to quickly identify which units are complete, which are still in progress, and where exceptions or compliance gaps may exist.

Once all units have completed their required tasks and assessments, the rounding coordinator closes the healthcare orchestration case, completing the rounding cycle. This multi-unit task plan approach improves operational reliability, reduces manual coordination, and supports compliance with internal policies and regulatory requirements across the health system.

Configuring Care Team Work Management

Set up the Care Team Work Management application.

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Configuration overview

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2. Setting up roles and responsibilities in Care Team Work Management

   To manage access effectively in Care Team Work Management, first understand how roles and responsibilities work together. These concepts build on the Service Model Foundation (SMF) but are adapted for Healthcare Operations-specific use cases.

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   Understand how healthcare locations and healthcare organizations function and should be organized to set up your care teams and the physical locations they operate in correctly.

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5. Add or remove members in Healthcare Operations Core

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6. Task Plan Templates in Care Team Work Management

   Understand how task plan templates can be leveraged from Customer Service Management in Care Team Work Management.

Activate Care Team Work Management

Activate the Care Team Work Management [com.sn_cto] application.

Before you begin
Role required: admin

About this task
The application includes demo data for Care Team Work Management and installs related applications and plugins when they aren't already installed.

This application has a dependency on Healthcare Operations Core [com.sn_hco].

Note:
Installing Care Team Work Management also installs the following applications:

- Healthcare and Life Sciences Service Management Core
- Healthcare Operations Core
- Healthcare Operations Orchestration
- Smart Assessments
- Task Plan Templates
- Planned Work Management (PWM)

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Care Team Work Management application [com.sn_cto] using the filter criteria and search bar.
3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. Select **Install**.

Setting up roles and responsibilities in Care Team Work Management

To manage access effectively in Care Team Work Management, first understand how roles and responsibilities work together. These concepts build on the Service Model Foundation (SMF) but are adapted for Healthcare Operations-specific use cases.

To understand how roles and responsibilities function in Healthcare Operations, see Setting up roles and responsibilities for Healthcare Operations users.

Roles control access to features, capabilities, and data in the Care Team Work Management application.

You can assign roles to individual users or groups. When you apply roles to groups, the members of those groups inherit those roles.

Note:
User roles can be configured during the initial setup process for healthcare organizations or at any time thereafter as needed.

Example: For a user to be able to run playbooks and create task templates, they should have the following role configuration:

1. **sn_cto.care_team_agent** or **sn_cto.loc_support_agent** for access to the Care Team Work Management application.
2. **sn_hco_orc.loc_support_agent** or **sn_hco_orc.admin** for access to forms from the Healthcare Orchestration plugin.
3. **sn_hco_orc.plan_author** for access to task plan creation, scheduling and the ability to select multiple organizations for playbooks.

For instructions on assigning roles to groups, see Create a group for all care team members in Healthcare Operations Core.

The following roles and responsibilities are included with Care Team Work Management.

Role	Responsibility	Description
`sn_cto.care_team_agent`	Care Team Agent Inherits Location Support Agent responsibility from Service	Use the Care Team Agent responsibility to work on care team cases and care team tasks assigned to your healthcare organization(s).

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Role	Responsibility	Description
	Model Foundation.	
sn_cto.care_team_agent_manager	Care Team Agent Manager or Operational Leader Inherits Location Manager Fulfiller role from Service Model Foundation.	Use the Care Team Agent Manager responsibility to work on care team cases and care team tasks assigned to your healthcare organizations, and manage your healthcare organization members.

Set up roles for care teams

Set up your care team agents and care team agent managers with the correct roles so care team cases and care team tasks can be fulfilled.

Before you begin

Role required: admin

About this task

In order to fulfill care team cases and tasks, the following roles should be assigned to care team members:

Roles

Role	Persona	Description
sn_cto.care_team_agent	Care Team Agent	Works on care team tasks and smart assessments.
sn_cto.care_team_agent_manager	Care Team Agent Manager	Configures addition/removal of care team members, task plan templates, and smart questionnaire templates.

Procedure

1. Navigate to **All** > **User Administration** > **Users** then open a user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**.
4. Select **Save**.

Assign operational leader roles

Assign your operational leaders the correct roles so that they can leverage the Operational Rounding playbook to create task plan templates for care teams.

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Before you begin
Role required: admin

About this task
Operational leaders create and fulfill task plan templates generates from the Operational Rounding playbook.

Operational leaders require two user roles:

- sn_hco_orc.plan_author **and**
- sn_hco_orc.loc_support_agent_manager **or** sn_hco_orc.loc_support_agent

For example, a supporting services department manager who needs to create task plan templates using the Operational Rounding playbook would have the sn_hco_orc.plan_author and sn_hco_orc.loc_support_agent_manager roles assigned to their user profile.

Procedure
1. Navigate to **All** > **User Administration** > **Users** then open a user record.
2. In the **Roles** related list, select **Edit**.
3. In the **Collection** list, select the desired roles, and then select **Add**.
4. Select **Save**.

Assign responsibilities for Care Team Work Management

Assign responsibilities to users in Care Team Work Management to dictate which specific records users are authorized to view or modify.

Before you begin
Role required: admin

About this task
You can edit the responsibilities of Care Team Work Management users when adding or removing members from your healthcare organizations, or at any time as needed.

Note:

In order to access care team case and task information, all operational leaders should be assigned the **Care Team Agent Manager** responsibility.

Responsibility	Role
Care Team Agent	sn_cto.care_team_agent
Care Team Agent Manager	sn_cto.care_team_agent_manager

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations** > **All**.
2. Select the parent organization.
3. Navigate to the **Members** related list.
4. Select **Edit members**.
5. In **Responsibility**, select the intended responsibility for the user.
6. Use the arrows between the **Available** and **Selected** panels to add the member.

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Note:

If a newly added user isn't populated in the Available list, search for them manually using the lookup icon.

On occasion, newly added members don't appear within the Selected panel due to property configurations. If this occurs, see Configure global system properties to edit members in Healthcare Operations Core.

7. Select **Save**.

Create a group for Care Team Agents

Create a group for care team agents with the sn_cto.care_team_agent role assigned so that users added to this group will inherit the collection of roles needed for care team agents.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Click **Edit**.
7. Add the sn_cto.care_team_agent role into the Roles List.
8. Click **Save**.

Result
A user group has been created that you can assign care team members to when doing automated user imports.

Create a group for Care Team Agent Managers

Create a group for care team agents with the sn_cto.care_team_agent_manager and wm.dispatch roles assigned so that users added to this group will inherit the collection of roles needed for care team managers.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Click **Edit**.

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7. Add the sn_cto.care_team_agent_manager and wm.dispatch roles into the Roles List.
8. Click **Save**.

Result
A user group has been created that you can assign care team members to when doing automated user imports.

Create a group for operational leaders

Create a group for operational leaders with the sn_cto.care_team_agent_manager and wm.dispatch roles assigned so that users added to this group will inherit the collection of roles needed for care team managers.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **User Administration** > **Groups**.
2. Select **New**.
3. In the name field, enter a name for your team member group.
4. Fill in the other fields as needed.
5. Navigate to the roles related list.
6. Click **Edit**.
7. Add the sn_cto.care_team_agent_manager and wm.dispatch roles into the Roles List.
8. Click **Save**.

Result
A user group has been created that you can assign care team members to when doing automated user imports.

Add or remove members in Healthcare Operations Core

Add or remove members from your healthcare organizations.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations** > **All**.
2. Select the Healthcare organization that you want to edit a member of.
3. Navigate to the **Members** related list.
4. Select **Edit members**.
5. In **Responsibility**, select the responsibility you want to edit the members of.
   Options are:
   - Care team member
   - Care team manager
6. Use the arrows between the **Available** and **Selected** panels to indicate which members belong to each responsibility.

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Note:

If a newly added user isn't populated in the Available list, search for them manually using the lookup icon.

On occasion, newly added members won't appear within the Selected panel due to property configurations. If this occurs, see Configure global system properties to edit members in Healthcare Operations Core.

7. Select **Save**.

Configure global system properties to edit members in Healthcare Operations Core

A global system property must be configured to properly use the Edit Members functionality in Healthcare Operations Core.

Before you begin

On occasion, newly added members won't appear within the Selected panel when editing members in Healthcare Operations Core.

This issue is often caused by the limited number of items that are shown in the list collector.

To fix this issue, create a global system property with the name glide.xmlhttp.excessive, a type of integer, and a large number for the value limit based on the total number of users in the application.

Role required: admin

Procedure

1. Set your scope to **Global**.
2. Navigate to **All** > **System Properties**.
3. Select **New**.
4. Fill in the following fields:
   a. Name - glide.xmlhttp.excessive
   b. Type - integer
   c. Value - Enter a high value here that represents the total potential number of users. For example, 10000.
5. Select **Submit**.

Result

The "Available" and "Selected" fields on the Edit Member table displays all available selections.

Setting up healthcare locations and healthcare organizations

Understand how healthcare locations and healthcare organizations function and should be organized to set up your care teams and the physical locations they operate in correctly.

Healthcare organizations

The **healthcare organization** [sn_hcls_organization] table stores the details of a healthcare organization in your ServiceNow instance. It's the authoritative reference for defining the organization hierarchy within a healthcare delivery network, capturing the structure that supports operations like access control, visibility, and routing.

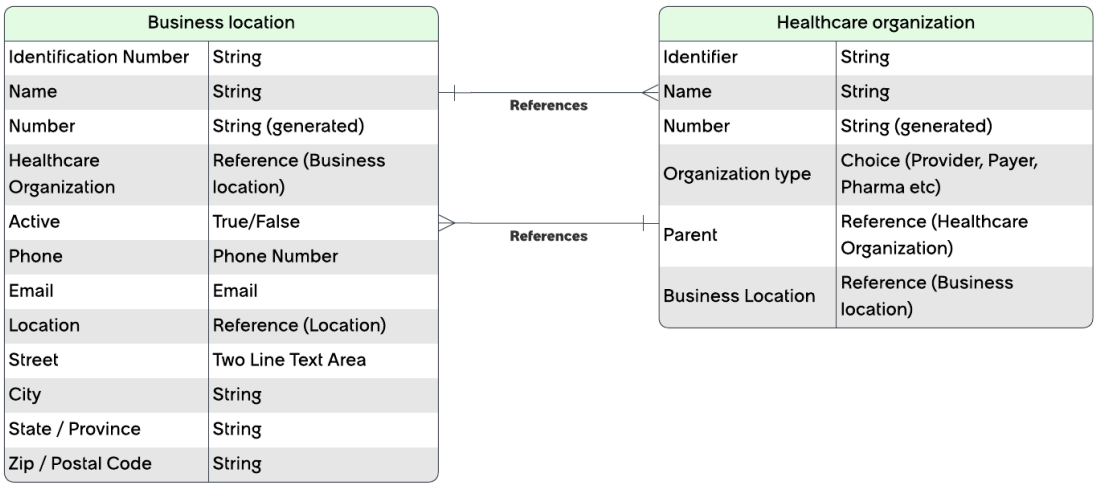
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An example healthcare organization hierarchy might look like:

HQ → Hospital → Department → Unit

Structuring healthcare organizations correctly is vital to healthcare operations as it defines the organizational structure, influencing visibility, responsibility, and routing.

Healthcare organization [sn_hcls_organization] table technical details



When a healthcare organization is created, an associated business location is also created with the same name that references the healthcare organization. A bidirectional reference exists between the two tables. A business location is an extension of a service organization.

A healthcare organization is associated with a business location, either internal or external.

It contains specific attributes not found in the service organization table. For example, organization type.

Use the **parent organization** field to create multi-level hierarchies by labeling healthcare organizations as parent to other healthcare organizations.

The **healthcare organization location association** table is used to store the explicit link between healthcare locations and their owning healthcare organization.

For information on the fields present in the Healthcare organization table, see Healthcare organization table.

Healthcare locations

The **healthcare location** [sn_hcls_location] table represents the physical or virtual places where care and operational work occur — campuses, buildings, wings, units, rooms, and other serviceable spaces.

An example healthcare location hierarchy might look like:

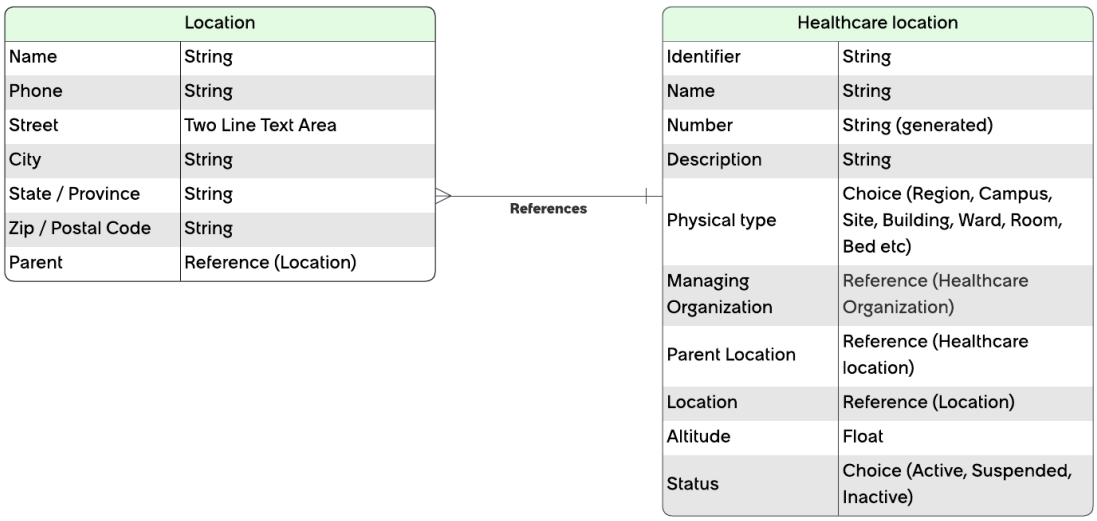
Campus → Hospital Building → Pediatrics Wing → PICU Unit → Bed or **Room**

Structuring healthcare locations correctly enables agents and care teams to reference the precise location of issues. For example, an IT support agent can identify what room in the PICU unit has a broken monitor that needs repair.

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By tying work to a specific location, ambiguity is reduced in requests and escalations, enabling for more efficient responses from care teams.

Healthcare location [sn_hcls_location] table technical details



The healthcare location table provides the ability to map common locations to healthcare organizations.

The common location [cmn_location] table provides the basis for location setup across the ServiceNow platform. Healthcare locations leverage common locations to extend the existing data into the HCLS data model.

Healthcare locations enable you to add attributes that aren't available in the common location table. For example, the altitude field is available in healthcare locations without being added to all common locations.

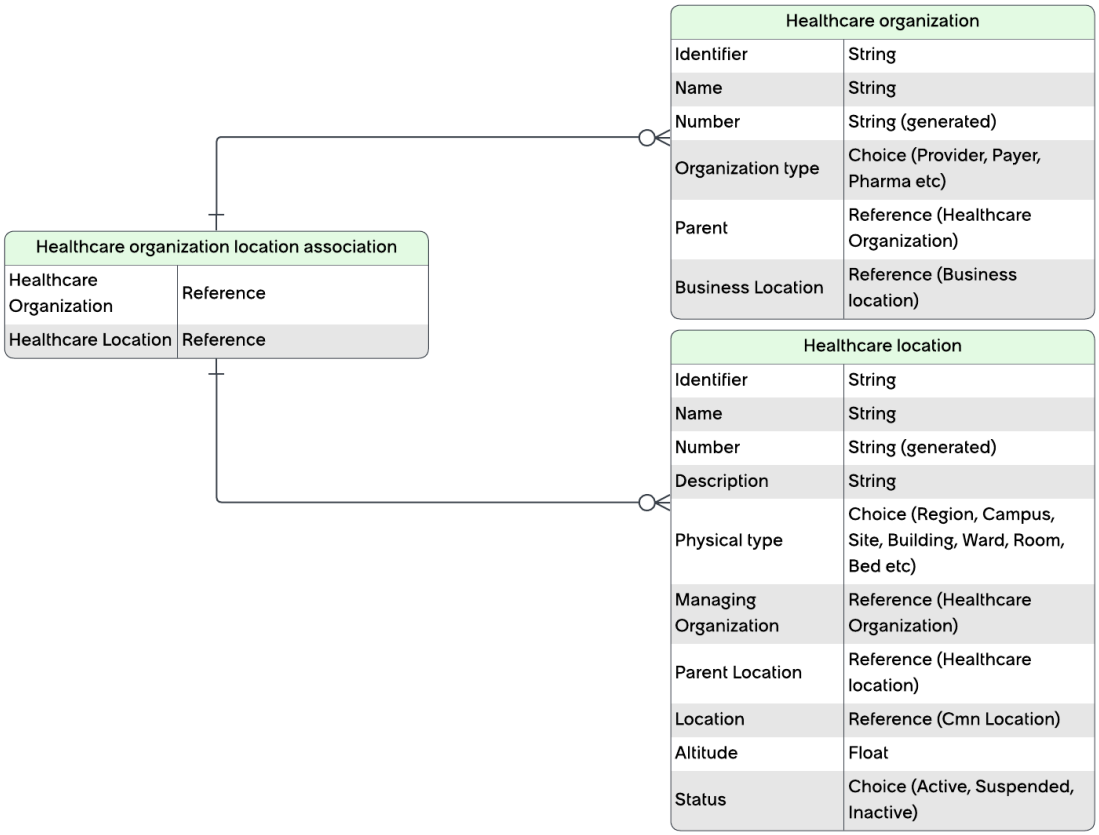
The **healthcare organization location association** table limits the common locations shown to care team members when reporting issues, displaying only those that their unit is responsible for. This table is used to store the explicit link between healthcare locations and their owning healthcare organization.

Use the **Parent location** field to create multi-level hierarchies by labeling healthcare locations as parent to other healthcare locations.

For information on the fields present in the Healthcare location table, see Healthcare location table.

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Associating healthcare locations and healthcare organizations



The **healthcare organization location association** table [sn_hcls_organization_location_association] establishes a definitive connection between healthcare organizations and healthcare locations. This connection determines the healthcare organization responsible for a particular location.

Healthcare locations define which common locations a healthcare organization is responsible for. When a member of a care team unit goes to report an issue, they're presented with a limited list of common locations that their unit is responsible for. This eliminates the need to sift through all available common locations in the system.

When creating a healthcare organization or a healthcare location, you can use this table to associate a healthcare location with a healthcare organization (or vice versa).

For more information on this process, see Associate healthcare locations with a healthcare organizations

How to set up healthcare organizations and healthcare locations

To create healthcare locations and healthcare organizations, see the following topics.

1. Create a healthcare location
2. Create a healthcare organization
3. Associate healthcare locations with a healthcare organizations

Create a healthcare organization

Create a healthcare organization for use with Healthcare and Life Sciences Service Management Core.

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Before you begin
Role required: admin

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

When a healthcare organization is created, an associated business location is also created with the same name that references the healthcare organization.

For more information, see Setting up healthcare locations and healthcare organizations and Healthcare organization table.

Procedure
1. Navigate to **All** > **HCLS Service Management** > **Organization data** > **Healthcare organizations**.
2. Select **New**.
3. Fill in the following fields.

Field	Description
Name	The name of your healthcare organization.
Organization type	Type of healthcare organization you represent. The following types are available by default: ○ Clinical research sponsor ○ Community group ○ Educational institute ○ Government ○ Healthcare provider ○ Hospital department ○ Non-healthcare business ○ Organizational team ○ Other ○ Payer

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Field	Description
	○ Pharmaceutical company ○ Religious institution For more information about the available organization types, see organization types defined in the FHIR specifications.
Parent organization	Parent organization associated with the organization.
Phone	Phone number of the organization.
Email	Email address associated with the organization.
Description	A description of this healthcare organization.
This is an internal location	Indicates whether this organization is considered an internal location.
Common location	The associated common location.

4. Select **Save**.

Create a healthcare location

Create healthcare locations to designate the locations in which your care teams operate.

Before you begin

Role required: admin

About this task

Healthcare locations are the physical or virtual places where care and operational work occur—campuses, buildings, wings, units, rooms, and other serviceable spaces. .

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

For more information, see Setting up healthcare locations and healthcare organizations and Healthcare location table.

Procedure

1. Navigate to **All** > **HCLS Service Management** > **Organization data** > **Healthcare location**.
2. Select **New**.
3. Fill in the following fields.

Field	Description
Name	Name to identify the healthcare location.
Physical type	Physical form of the location.

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Field	Description
	The following types are available by default: ○ Area ○ Bed ○ Building ○ Cabinet ○ Corridor ○ Jurisdiction ○ Level ○ Room ○ Road ○ Site ○ Vehicle ○ Wing ○ Ward For more information about the available physical types, see location types defined in the FHIR specifications.
Parent location	The parent location of this healthcare location. Set your parent location to create a hierarchy of locations in which the current healthcare location is nested under that parent location. For more information, see Example - Organizing your healthcare locations.
Location	Physical location of this healthcare location. Entry selected here populates address fields.

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Field	Description
	Value here references the Common Location [cmn_location] table.
Latitude	Latitude of the absolute geographic location.
Longitude	Longitude of the absolute geographic location.
Altitude	Altitude of the absolute geographic location.
Status	Option to indicate whether the healthcare location is in use. The following statuses are available by default: ○ Active ○ Inactive ○ Suspended For more information about the available statuses, see location statuses defined in the FHIR specifications.
Street	Mailing street address of the physical location.
City	City in which the physical location is located.
State/Province	State or province in which the physical location is located.
Zip / Postal Code	ZIP or postal code for the physical location.
Phone	Phone number of the physical location.
Identifier	Unique identifier associated with this location.
Description	A description of this healthcare location.

4. Select **Submit**.

Associate healthcare locations with a healthcare organizations

Associate healthcare locations with healthcare organizations.

About this task

In scenarios where a healthcare location is being utilized by multiple healthcare organizations, you can associate those organizations with a location.

You can also associate multiple healthcare organizations with a healthcare location, or vice versa.

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For example, a single ICU room in a hospital might be used by multiple departments, such as cardiology and neurology. You would associate those departments (Healthcare organizations) with the ICU room (a Healthcare location) using the steps that follow.

For more information, see Setting up healthcare locations and healthcare organizations.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **HCLS Service Management** > **Organization data** > **Healthcare organizations**.
2. Select the Healthcare organization you want to associate with a healthcare location.
3. Navigate to the **Healthcare locations** related list.
4. Click **Edit**.
5. In the Collection panel, select the Healthcare locations you want added to this Healthcare organization and use the right arrow to move them into the Healthcare locations List for this organization.

   Note:
   To remove a location from an organization, simply use the left arrow to move the location from the Healthcare locations List into the Collection list.

6. Click **Save**.

Example - Associate a healthcare location with a healthcare organization

Explore how a healthcare location associated with an existing healthcare organization, so that users in the organization can select the location when creating support requests using Care Team Operations.

Before you begin
Role required: admin

About this task
Scenario: At Alectri Health Santa Clara Hospital, an ICU room is being used by both the cardiology and neurology departments. Armand, a ServiceNow administrator, needs to associate this room with multiple departments so care team members associated with these departments can select the location when creating support requests using care team operations.

Procedure

1. Navigate to **All > Healthcare Operations > Healthcare Organizations**.
2. Select **Alectri Health Santa Clara Cardiology.**

   Note: This is the healthcare organization to be associated with a location.

3. Navigate to the **Healthcare locations** related list.
4. Click **Edit**.
5. In the Collection panel, select **ICU Room** and use the right arrow to move it into the Healthcare Locations panel.
6. Select **Save**.
7. Repeat the above steps for **Alectri Health Santa Clara Neurology.**

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Result
The ICU room has now been associated with both Alectri Health Santa Clara neurology and cardiology departments and can be selected by care team members of both departments when creating support requests.

Create healthcare providers

Create a healthcare provider and associate it with a parent healthcare organization and a common location.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare providers**.
2. Select **New**.
3. Fill in the following fields.

Note:

The Organization type field is automatically set to healthcare provider and is read only.

Field	Description
Name	Name to identify the healthcare provider.
Parent Organization	Parent organization associated with the provider.
Manager	The manager associated with this healthcare provider.
Phone	Phone number of the provider.
Email	Email address associated with the provider.
Description	A description of this healthcare provider.
This is an internal location	Indicates that this healthcare provider is considered an internal location.
Common Location	The common location associated with this healthcare provider.

4. Select **Submit**.

Create healthcare departments

Create a healthcare department and associate it with a parent healthcare organization and a common location.

Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **Healthcare Operations** > **Healthcare departments**.
2. Select **New**.

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3. Fill in the following fields.

Note:

The Organization type field is automatically set to healthcare department and is read only.

Field	Description
Name	Name to identify the healthcare department.
Parent Organization	Parent organization associated with the department.
Manager	The manager associated with this healthcare department.
Phone	Phone number of the department.
Email	Email address associated with the department.
Description	A description of this healthcare department.
This is an internal location	Indicates that this healthcare department is considered an internal location.
Common Location	The common location associated with this department.

4. Select **Submit**.

Create organizational teams in Healthcare Operations Core

Create a healthcare organization to associate with your healthcare department.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations**.
2. Select **New**.
3. Ensure the **Organization type** field is set to **Organizational Team**.
4. Fill in the following fields.

Field	Description
Name	Name to identify the organizational team.
Parent Organization	Parent organization associated with the organizational team.
Manager	The manager associated with this organizational team.
Phone	Phone number of the organizational team.

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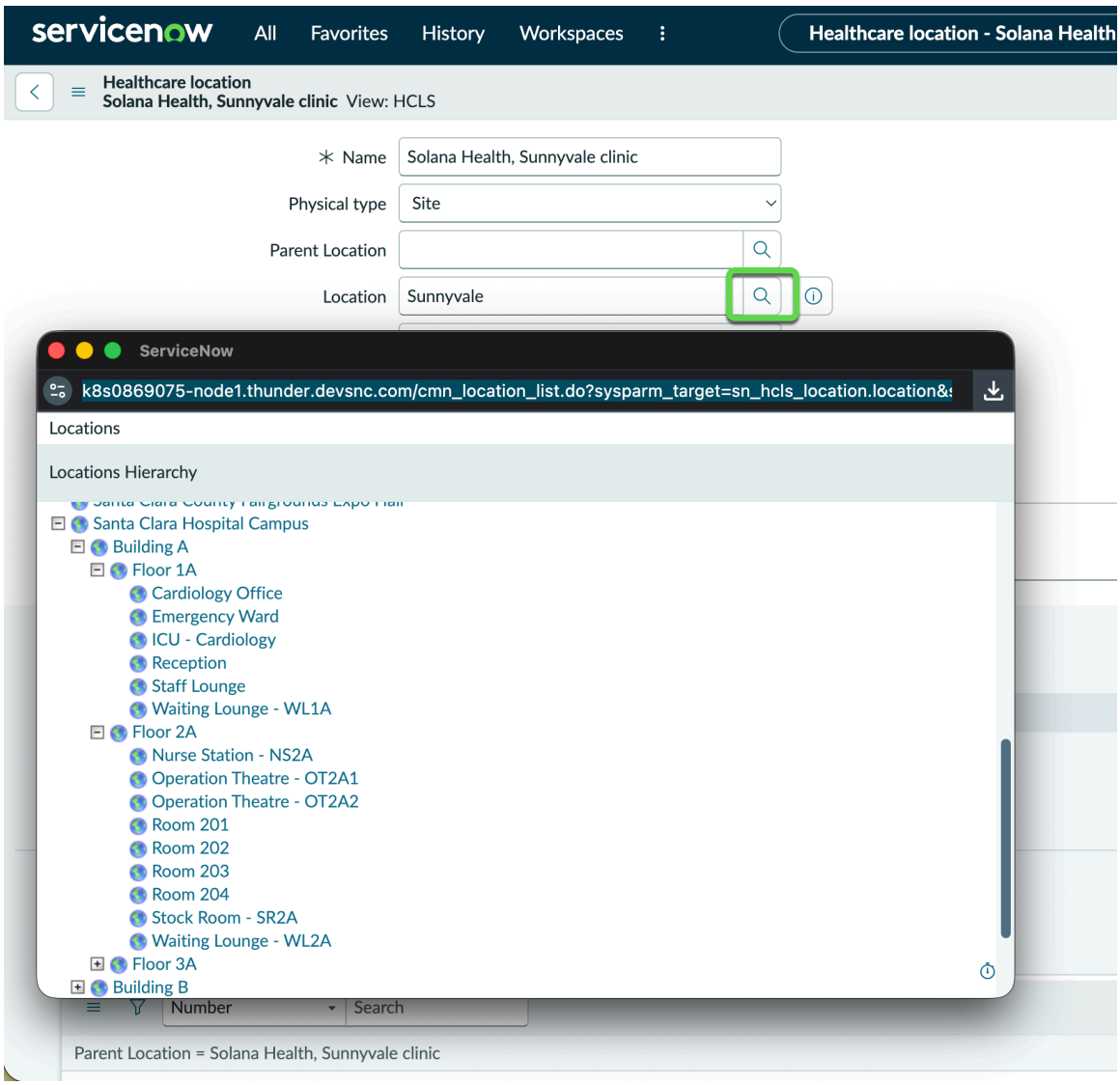
Field	Description
Email	Email address associated with the organizational team.
Description	A description of this organizational team.
This is an internal location	Indicates that this organizational team is considered an internal location.
Common Location	The common location associated with this organizational team.

5. Select **Submit**.

Organizing your Healthcare Locations

Your healthcare locations should be organized based on the physical layouts of the locations in which your care teams operate.

When you're creating a location, you can navigate the existing location hierarchy to select where the location being newly created should reside:



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When a location is created, the **Location hierarchy** panel displays up to three parent levels higher within a location's hierarchy.

Note:
The location hierarchy shows only when the healthcare location is opened from the Healthcare Operations Core app module.

Organizing your healthcare organizations for Healthcare Operations Core

Properly organize your healthcare organizations to reflect your team hierarchies.

In Healthcare Operations Core, healthcare organizations typically exist in a multi-level hierarchy.

The Healthcare Operations app menu shows one example of what this structure might look like within your healthcare organization.



Healthcare organizations use the child organization-related list to display their direct child organizations.

The Business locations served value determines how you track the relationship between requesting and fulfilling healthcare organizations. You can set hierarchy or relationship-based support criteria for your healthcare locations.

The following are all Healthcare organizations related lists and their features:

- Child organization - select **New** in the child organizations related list to add a new child organization to the current healthcare organization record. When a healthcare organization is created, the value it lists for **Parent organization** indicates who the parent organization will be.
- Members – Displays all members of this organization. Select **Edit** to add, remove, or alter the responsibilities of members.
- Case opened by members – Displays all cases currently opened by members of this organization.
- Healthcare locations – Displays all associated healthcare locations with this healthcare organization. Select **Edit** manage these associations.

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- Assignment groups – Displays all associated assignment groups.
- Available services – Displays all available services within this organization.
- Service organization customer criteria – Displays which customers are serviced by this healthcare organization.

Example - Create a parent organization (HQ)

Explore how a parent organization is created for Healthcare Operations, under which departments or similar sub-organizations can then be created and organized.

Before you begin
Role required: admin

About this task
Scenario: Armand, a ServiceNow administrator for a hospital, needs to set up a parent organization within Healthcare Operations. This parent organization will serve as the top-level entity under which various healthcare providers and facilities will be organized. Armand creates a parent organization in ServiceNow to ensure that all related entities inherit the correct organizational structure and permissions.

Procedure

1. Navigate to **All** > **Healthcare organizations** > **All**.
2. Select **New**.
3. Fill in the following fields.
   - Name - Enter **Alectri Health**.
   - Organization type - Enter **Healthcare Provider**.
4. Select **Submit**.

Result
A parent organization representing HQ, Alectri Health, has been created. This serves as the top-level entity for healthcare organizations within this organization.

Example - Create a hospital

Explore how a hospital is created under an existing parent organization for Healthcare Operations, under which departments or similar sub-organizations can then be created and organized under.

Before you begin
Role required: admin

About this task
Scenario: Armand, a ServiceNow administrator for a hospital, needs to set up a pediatrics department at Alectri Santa Clara hospital. Armand creates the department within the hospital in ServiceNow so he can ensure that all related entities inherit the correct organizational structure and permissions.

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations** > **All**.
2. Select **New**.
3. Fill in the following fields.

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- Name - Enter **Alectri Santa Clara**.
- Organization type - Enter **Healthcare Provider**.
- Parent organization - Enter the parent organization created in Example - Create a parent organization (HQ). **Alectri Health**.

4. Select **Submit**.

Result
A hospital, **Alectri Santa Clara**, is created under the parent organization **Alectri Health**. Armand can now repeat this process for all other hospitals that fall under that parent organization.

Example - Create a department

Explore how a department is created under an existing hospital for Healthcare Operations, under which department organization teams can then be created.

Before you begin
Role required: admin

About this task
Scenario: Armand, a ServiceNow administrator for a hospital, needs to set up a pediatrics department at Alectri Santa Clara hospital. Armand creates the department within the hospital in ServiceNow so it is ensured that all related entities inherit the correct organizational structure and permissions.

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations** > **All**.
2. Select **New**.
3. Fill in the following fields.
   - Name - Enter **Pediatrics Alectri Santa Clara**.
   - Organization type - Select **Healthcare Department**.
   - Parent organization - Select the parent hospital created in Example - Create a hospital, **Alectri Santa Clara**.
4. Select **Submit**.

Result
The **Pediatrics Alectri Santa Clara Department** has been created under the parent hospital **Alectri Santa Clara**. Armand can then repeat this process for all other departments within this hospital as needed.

Example - Create a department organization team

Explore how a department organization team is created under an existing department for Healthcare Operations.

Before you begin
Role required: admin

About this task
Scenario: Armand, a ServiceNow administrator for a hospital, needs to set up the Pediatrics department organization team at Pediatrics Alectri Santa Clata. These teams need to be associated with the specific department they are attached to. By correctly setting up department organizations under the parent department, this ensures that all related entities inherit the correct organizational structure and permissions.

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Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare organizations** > **All**.
2. Select **New**.
3. Fill in the following fields.
   - Name - Enter **Pediatrics Alectri Santa Clara**.
   - Organization type - Select **Organization team**.
   - Parent organization - Select the parent department created in Example - Create a department, **Pediatrics Alectri Santa Clara**.
4. Select **Submit**.

Result

The General Pediatric Alectri Santa Clara department organization team has been created under the parent department Pediatrics Alectri Santa Clara. This setup ensures a streamlined and efficient organizational structure for managing various teams within the department.

Create assignment groups for Care Team Work Management

Associate assignment groups within your care team units so care team cases and tasks can be fulfilled.

Before you begin

Role required: admin

About this task

Create assignment groups within each healthcare organization to control work distribution.

For example, you might add a "PICU Nurses" group or separate groups for day and night shifts.

Once created under the PICU healthcare organization, that group becomes available when assigning care team cases and tasks.

Procedure

1. Navigate to **All** > **Healthcare Operations** > **Healthcare Organizations**.
2. Select the healthcare organization that you want to associate an assignment group with.
3. In the Assignment Groups related list, select **New**.
4. On the Service Organization Assignment Group form, fill in the fields:

Field	Description
Service organization	Auto-populated with the name of the healthcare organization to which you're adding an assignment group.
Assignment group	Name of the assignment group that is to be added.

5. Select **Submit**.

Task Plan Templates in Care Team Work Management

Understand how task plan templates can be leveraged from Customer Service Management in Care Team Work Management.

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Care Team Work Management enables for the creation of custom task plan templates to define the repeatable tasks and records that must be created for care team agents. When the template is applied, these tasks and records are automatically created.

For information about how task plan templates work, see Task Plan Templates.

Creating task plans for Care Team Work Management

When creating a task plan template, you must create a **Task plan configuration** for your task plans to pre-fill information into task plan template fields.

For more information, see Create a task plan template configuration.

You can create one or more template items, such as a task or record, for a task plan template. When the task plan template is applied, these records are automatically created. For more information, see Create a template item.

Multiple template items can be created from the same configuration. For example, multiple Orchestration tasks can be generated from one single configuration. Or, a task plan for a medical device audit might be configured to generate Biomed cases as child cases to the parent Orchestration case.

The following additional healthcare operations case types are available to be configured as template items under Orchestration cases:

- Healthcare Operations cases
- Biomed cases
- Facilities cases
- EVS cases
- Healthcare IT cases

Playbook Record Generator

For a task plan template to open in a Playbook, a Playbook Record Generator must be associated in the Task Plan Template Configuration.

Create a care team task plan using the Operational rounding playbook

A purpose-built Operational Rounding Playbook guides plan authoring across multiple apps in a single flow—from plan details, healthcare orchestration case/task setup, and affected organization selection to scheduling and publish.

1. Create an Operational rounding task plan

   Create a new task plan using the Operational rounding playbook.

2. Input plan details into the Operational Rounding playbook

   Complete the **Plan details** playbook stage in the Operational rounding playbook.

3. Input Orchestration case details into the Operational Rounding playbook

   Complete the **Orchestration case** playbook stage in the Operational rounding playbook

4. Input Orchestration task details into the Operational Rounding playbook

   Complete the **Orchestration task** playbook stage in the Operational rounding playbook.

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5. Input Care team case details into the Operational Rounding playbook

   Complete the **Care team case** playbook stage in the Operational rounding playbook.

6. Input Care team task details into the Operational Rounding playbook

   Complete the **Care team task** playbook stage in the Operational rounding playbook.

7. Input Assigned organizations details into the Operational Rounding playbook

   Complete the **Assigned organizations** playbook stage in the Operational rounding playbook.

8. Input Schedule details into the Operational Rounding playbook

   Complete the **Schedule** playbook stage in the Operational rounding playbook.

Create an Operational rounding task plan

Create a new task plan using the Operational rounding playbook.

Before you begin

Role required: sn_hco_orc.loc_support_agent or sn_hco_orc.plan author

About this task

Procedure

1. Navigate to **CSM/FSM Configurable Workspace** > **Task Plan Templates** > **All Task Plans** > **New**.
2. In **Create new task plan**, select **Operational Rounding**.
3. Select **Create plan**.
4. Complete the playbook stages that follow.

What to do next

Input plan details into the Operational Rounding playbook

Input plan details into the Operational Rounding playbook

Complete the **Plan details** playbook stage in the Operational rounding playbook.

Before you begin

Role required: sn_hco_orc.loc_support_agent or sn_hco_orc.plan author

Procedure

1. In the **Operational rounding playbook**, navigate to the **Plan details** stage.
2. Provide a **Plan name**.
3. Enter a **Plan description**.
4. Select **Save**.

What to do next

Input Orchestration case details into the Operational Rounding playbook

Input Orchestration case details into the Operational Rounding playbook

Complete the **Orchestration case** playbook stage in the Operational rounding playbook.

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Before you begin

Role required: sn_hco_orc.loc_support_agent or sn_hco_orc.plan author

Procedure

1. In the **Operational rounding playbook**, navigate to the **Orchestraion case** stage.
2. Fill in the following fields.

Field	Description
Short description	A short description of this healthcare orchestration case. For example, **Quarterly safety audits**.
Priority	The priority level of this healthcare orchestration case. Choices are: ○ 1 - Critical ○ 2 - High ○ 3 - Medium ○ 4 - Low
Service definition	For example, Care team safety assessment. For example, **Care team safety assessment**.
Requesting organization	The healthcare organization associated with this healthcare orchestration case requestor.
Requested by	The healthcare organization associated with this healthcare orchestration case requestor.
Supporting organization	The organization responsible for fulfilment.
Assignment group	The assignment group associated with this healthcare orchestration case.
Assigned to	The assignment group associated with this healthcare orchestration case.
Description	A detailed description of the work being requested.

3. Select **Continue**.

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What to do next
Input Orchestration task details into the Operational Rounding playbook

Input Orchestration task details into the Operational Rounding playbook

Complete the **Orchestration task** playbook stage in the Operational rounding playbook.

Before you begin
Role required: sn_hco_orc.loc_support_agent or sn_hco_orc.plan author

Procedure

1. In the **Operational rounding playbook**, navigate to the **Orchestration tasks** stage.
2. Select **Add task** to define coordinator activities.

   For example, “Send unit communications” or “Review submitted assessments”.
3. Set other fields as needed.
4. Select **Continue**.

What to do next
Input Care team case details into the Operational Rounding playbook

Input Care team case details into the Operational Rounding playbook

Complete the **Care team case** playbook stage in the Operational rounding playbook.

Before you begin
Role required: sn_hco_orc.loc_support_agent or sn_hco_orc.plan author

Procedure

1. In the **Operational rounding playbook**, navigate to the **Care team case** stage.
2. Provide a **Short description**.
   For example, “Conduct safety assessment in your unit”.
3. Set the **Priority**.
4. Enter a detailed description.
5. Select **Save & continue.**

What to do next
Input Care team task details into the Operational Rounding playbook

Input Care team task details into the Operational Rounding playbook

Complete the **Care team task** playbook stage in the Operational rounding playbook.

Before you begin
Role required: sn_hco_orc.loc_support_agent or sn_hco_orc.plan author

Procedure

1. In the **Operational rounding playbook**, navigate to the **Care team task** stage.
2. Enter a name and short description for a task.
3. If required, select **+Add** to add an additional task.
4. Select **Continue**.

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What to do next
Input Assigned organizations details into the Operational Rounding playbook

Input Assigned organizations details into the Operational Rounding playbook

Complete the **Assigned organizations** playbook stage in the Operational rounding playbook.

Before you begin
Role required: sn_hco_orc.loc_support_agent or sn_hco_orc.plan author

Procedure

1. In the **Operational rounding playbook**, navigate to the **Assigned Organizations** stage.
2. Use the **Organizational selector** to check one of more units/departments across hospitals.

   Note:
   Use **Add all** to add all organizations to this plan.

3. Select **Save**.

   The plan will generate **Care Team Cases** and any associated tasks for each selected organization.

What to do next
Input Schedule details into the Operational Rounding playbook

Input Schedule details into the Operational Rounding playbook

Complete the **Schedule** playbook stage in the Operational rounding playbook.

Before you begin
Role required: sn_hco_orc.loc_support_agent or sn_hco_orc.plan author

Procedure

1. In the **Operational rounding playbook**, navigate to the **Schedule** stage.
2. Choose the cadence at which you want this case created:
   - **Immediate** - Generates the healthcare orchestration case and all child cases and tasks immediately upon publishing this plan.
   - **One time** - Generates the healthcare orchestration case and all child cases and tasks at a future date as specified in **Effective start date** in **Schedule details**.
   - **Recurring** - Generates the healthcare orchestration case and all child cases and tasks at the date specified in **Effective start date in Schedule details**and then recurs a series of days thereafter as specified in **Lead time [in days]**.
3. Select **Save & continue**.
4. Select **Publish** to publish your task plan.

Result
Your task plan has been published and any cases or tasks created as part of this plan will generate as scheduled.

What to do next
For information on monitoring the progress of your task plan, see Track care team task plans.

For information on fulfilling the healthcare orchestration cases and tasks generated as a result of this task plan, see Fulfill healthcare orchestration cases and tasks.

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Plan summary stage

Review the task plan template you created using the Operational rounding playbook.

Before you begin
Role required: admin

Procedure

1. In the **Operational rounding playbook**, navigate to the **Plan Summary** stage.
2. Review all playbook stages as needed:
   - Select a panel to display all field inputs for that stage.
   - Update information within a playbook stage by selecting **Edit**.
   - Select **Save** to save your updates or select **Cancel** to cancel any changes made.
3. Select **Publish**to publish your task plan template.

Result
Your task plan template is now published. Cases and tasks will now begin to generate.

Track care team task plans

Once you've published a task plan, you can track progress of all healthcare orchestration cases and tasks from within the Healthcare Workspace.

Before you begin
Role required: sn_hco_orc.plan_author

Procedure

1. In the Healthcare Operations Workspace, navigate to **Task Plan Templates** > **All Task Plan Templates**.
2. Select the Task Plan template you wish to review.
3. Navigate to **Template Items** to review all Healthcare orchestration cases, Healthcare orchestration tasks, Care team cases, and Care team tasks generated as a result of this plan.
4. Select a case or task number to open a more detailed view.
5. Navigate to **Task Plan Template Executions** to review all executions of this task plan. When a task plan is generated on a recurring basis, all history of these generations are represented here.
6. Select an execution number for a more detailed view of that execution.

Fulfilling care team task plans

Fulfill the cases and task generated from care team task plans.

- Fulfill healthcare orchestration cases and tasks

  Fulfill the healthcare operations orchestration cases and tasks created from task plans.

- Fulfill care team case and tasks

  Fulfill the care team cases and tasks created from task plans.

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Fulfill healthcare orchestration cases and tasks

Fulfill the healthcare operations orchestration cases and tasks created from task plans.

Before you begin
Role required: sn_hco_orc.loc_support_agent or sn_hco_orc.admin

About this task
For more information on healthcare orchestration cases and tasks, see Healthcare orchestration cases and tasks.

Procedure
1. In the Healthcare Orchestration Workspace, navigate to **Healthcare orchestration case** > **All cases**.
2. Update case details as needed.
3. Select **Tasks** to view all associated healthcare orchestration tasks.
4. Select a task and fulfill as needed.
5. Use **Close case** or **Close task** to close out the case or task, respectively.

Fulfill care team case and tasks

Fulfill the care team cases and tasks created from task plans.

Before you begin
Role required: sn_cto.care_team_agent or sn_cto.care_team_agent_manager

About this task
For more information on care team cases and tasks, see Care team cases and tasks.

Procedure
1. In the Healthcare Orchestration Workspace, navigate to **Care Team Case** > **All Cases**.
2. Update case details as needed.

   Note:
   Care team cases can be reassigned as needed.

3. Select **Tasks** to view all associated care team tasks.
4. Select a task and fulfill it as needed.
5. Use **Close case** or **Close task** to close out the case or task.

Care Team Work Management reference

Reference topics provide additional information about Care Team Work Management components.

Roles installed with Care Team Work Management

The following roles are installed with Care Team Work Management.

Role	Persona	Roles structure	Descrip
sn_cto.loc_contributor	Care Team Location Contributor	Contains: sn_task_plan.viewer	Can rec care tea operati

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			cases a read res of smar assessr
sn_cto.loc_support_agent	Care Team Location Support Agent	Contains: sn_hco.loc_support_agent wm_read (if Field Service Management is installed)	Views/ resolve cases u assignm group a tracks a fulfills c
sn_cto.care_team_agent	Care Team Agent	Contains: sn_cto.loc_support_agent sn_task_plan.viewer wm_basic sn_hco.care_team_membe	Works on care team ta and sm assessr
sn_cto.care_team_agent_manager	Care Team Agent Manager	Contains: sn_cto.care_team_agent sn_task_plan.creator sn_customerservice.svc_location_manager sn_hco.care_team_manager	Configu addition removal care tea membe task pla templat and sm questio templat
sn_cto.admin	Care Team Work Management Admin	Contains: sn_hco.admin sn_cto.care_team_agent_manager sn_task_plan.creator	Configu organiz and tea structur and has privileg of agen manage
sn_hco_orc.plan_author	Operational Leader	Contains: sn_task_plan.creator sn_fsm_planned_wm.planned_work_admin sn_case_creation.org_editor	Authors templat and schedu
sn_hco_orc.loc_support_agent	Support Agent		Creates fulfill th Healthc orchest tasks. C create healthc

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			orchest cases.
sn_hco_orc.loc_support_agent_manager	Support Agent Department Manager		Tracks a manage all the t and cas for supp departr
sn_hco_orc.admin	Healthcare Orchestration Admin	Contains: sn_hco.admin	Manage Healthc orchest roles ar duties.

Tables installed with Care Team Work Management

The following tables are installed with Care Team Work Management.

Care Team Case

The Care Team Case [sn_cto_case] table generates cases pertaining to care team internal operations at the unit level.

It extends the Healthcare Operations case [sn_hco_case].

For information on the Healthcare Operations case, see Healthcare Operations Case overview.

Field	Type	Description
Number	String	Unique identifier for the case.
Short Description	String	Brief description of the issue in 160 characters.
Description	String	Detailed description of the issue in 4000 characters.
Category	Integer	Different classifications of issues that are reported.
Healthcare location	Reference	Healthcare location from where the issue is being reported.
Location	Reference	Common location mapped to the healthcare location.
State	Integer	Person assigned to perform the task.
Priority	Integer	Sequence in which the case should be resolved.
Urgency	Integer	Speed at which the case should be resolved.
Impact	Integer	Level of disruption caused. Indicates the size of issue.
Opened by	Reference	The user who submitted the case.
Primary contact	Reference	The user for whom the case is created.
Assignment group	Reference	The assignment group of the user that fulfills and resolved the request/issue.
Assigned to	Reference	The user that fulfills and resolves the request.
Requesting organization	Reference	The service organization of the requestor.
Supporting organization	Reference	The service organization that fulfills the case.

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Service	Reference	Service definition linked to the case.

Care team task

The Care Team Task [sn_cto_task] table generates tasks attached to care team cases.

It extends the Work order task [wm_task] table.

References Healthcare Location [sn_hcls_location] to associate the relevant healthcare location with tasks for fulfillment.

Field	Type	Description
Opened for	Reference	The user who fulfills the care team task.
Parent	Reference	Parent work order.
State	Integer	State of care team task.
Assigned to	Reference	The user that fulfills and resolves the request.
Short description	String	Short description of the care team task.
Number	String	Number of care team tasks.
Service	Reference	Service definition linked to the case.

Healthcare orchestration case

The Healthcare healthcare orchestration case [sn_hco_orchestration_case] table creates a case to track the progress of work across multiple healthcare organizations with multiple care team cases.

Requires the Healthcare orchestration plugin.

Field	Type	Description
Short description	String	Short description of the orchestration case.
Priority	Choice	Sequence in which the case should be resolved.
Service definition	Reference	The service type of case.
Requesting organization	Reference	The organization of case requestor
Supporting organization	Reference	The organization of the person assigned to fulfill this case.
Assigned to	Reference	The person this case should be assigned to.
Requested by	Reference	The person who created this case.
Assignment group	Reference	Assignment group associated with this case.
Number	String	Case number.
Due date	Date time	Due date for the case.
State	Choice	Options are: • Open • Work in progress

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Field	Type	Description
		• Closed • Canceled

Healthcare orchestration task table

The Healthcare orchestration task [sn_hco_orchestration_task] table creates task to track any work that required for fulfilling an healthcare orchestration case.

Healthcare orchestration task (extended from CSM Task): the coordinator's own activities that support the healthcare orchestration case (e.g., communications, reviews).

Requires the Healthcare orchestration plugin.

Label	Type	Details
Short description	String	Short description of this task.
Priority	Choice	Sequence in which this task should be resolved.
State	Choice	Current state of the task.
Assigned to	Reference	The person to who this task is assigned.
Requested by	Reference	The person who created this task.
Assignment group	Reference	Assignment group associated with this task.
Description	Text	A detailed description of this task.
Number	String	Task number.
Due date	Date time	Due date for this task.

Now Assist for Healthcare Operations

Use the ServiceNow®Now Assist for Healthcare Operations application to create support requests in Care Team Mobile or Care Team Portal.

Get started

Explore



Explore the Now Assist for Healthcare Operations application.

Configure



Learn how to configure the Now Assist for Healthcare Operations application.

Create support requests



Use the agentic workflow to create support requests in Care Team Mobile or Care Team Portal.

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AI limitations

This application uses artificial intelligence (AI) and machine learning, which are rapidly evolving fields of study that generate predictions based on patterns in data. As a result, this application may not always produce accurate, complete, or appropriate information. Furthermore, there is no guarantee that this application has been fully trained or tested for your use case. To mitigate these issues, it is your responsibility to test and evaluate your use of this application for accuracy, harm, and appropriateness for your use case, employ human oversight of output, and refrain from relying solely on AI-generated outputs for decision-making purposes. This is especially important if you choose to deploy this application in areas with consequential impacts such as healthcare, finance, legal, employment, security, or infrastructure. You agree to abide by ServiceNow's AI Acceptable Use Policy, which may be updated by ServiceNow.

Data processing

This application requires data to be transferred from ServiceNow customers' individual instances to a centralized ServiceNow environment, which may be located in a different data center region from the one where your instance is, and potentially to a third-party cloud provider, such as Microsoft Azure. This data is handled per ServiceNow's internal policies and procedures, including our policies available through our CORE Compliance Portal.

Data collection

ServiceNow collects and uses the inputs, outputs, and edits to outputs of this application to develop and improve ServiceNow technologies including ServiceNow models and AI products. In addition, this application will collectCustomers can opt out of future data collection at any time, as described in the Now Assist Opt-Out page.

For more information, see the Now Assist documentation.

Exploring Now Assist for Healthcare Operations

Use ServiceNow®Now Assist for Healthcare Operations to create support requests for service departments conversationally through Virtual Agent on Care Team Mobile or Care Team Portal or via phone using Voice AI agent capabilities.

Request care team assistance agentic workflow

The Request care team assistance agentic workflow enables care teams to create support requests using the conversational abilities of Now Assist in Virtual Agent from directly within Care Team Portal or Care Team Mobile.

This workflow manages ambiguous or missing details by asking clarifying questions before creating a case (when appropriate). It then confirms all details and provides a confirmation of successful case creation along with the case number.

The following standalone AI agents are used in this workflow:

- Care team operations case intake AI agent
- Care team operations case creation AI agent

Note:
For the **Request care team assistance** agentic workflow to create cases, the Care Team Operations plugin for cases of that request type must be installed.

The following Care Team Operations plugins are available for use with this workflow:

- Care Team Operations for Biomed
- Care Team Operations for Environmental Services
- Care Team Operations for Facilities
- Care Team Operations for Healthcare IT

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Care Team Operations Case Creation Voice AI Agent

AI voice agents use generative AI to deliver natural, dynamic conversations that help users complete tasks, resolve issues, and access information—anytime, anywhere.

The Care Team Operations Case Creation Voice AI Agent enables care team members to create cases entirely through voice commands.

Note:
For the Care Team Operations Case Creation Voice AI Agent to create cases, the Care Team Operations plugin for cases of that request type must be installed.

Key benefits

- Designed to reduce administrative burden for care teams by replacing manual portal-based case entry with AI powered conversational intake.
- Designed to improve operational efficiency across hospital services by enabling multiple support requests to be created accurately from a single conversation.
- Designed to enable care team members with the capability to create or update support requests from their phone without the need to use an electronic device.

What to explore next

To learn more about configuring and using Now Assist for Healthcare Operations, see:

- Configuring Now Assist for Healthcare Operations
- Using Agentic AI in Now Assist for Healthcare Operations

Configuring Now Assist for Healthcare Operations

You must first configure the Now Assist for Healthcare Operations application so that care teams can use the agentic AI capabilities in Care Team Mobile or Care Team Portal.

Configuration overview

1. Install Now Assist for Healthcare Operations
2. Activate Now Assist in Virtual Agent for case intake
3. Activate AI Assistant for Care Team Portal
4. Enable the Request care team assistance agentic workflow to create care team cases
5. Enable Now Assist in AI Search for case intake
6. Enable the Now Assist icon in Care Team Mobile
7. Promote Now Assist in Virtual Agent for Care Team Portal
8. Activate the Care Team Operations Case Creation Voice AI Agent
9. Configure Care Team Operations Case Creation Voice AI agent triggers
10. Manage domain intelligence for AI agents

Install Now Assist for Healthcare Operations

Install the Now Assist for Healthcare Operations application [sn_cto_now_assist].

Before you begin
Role required: admin

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Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Find the Now Assist for Healthcare Operations application [sn_cto_now_assist] using the filter criteria and search bar.
   You can search for the application by its name or ID. If you can't 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.
3. If you're prompted, follow the links to the ServiceNow Store to get any additional entitlements for dependencies.
4. Select **Install**.

What to do next
Enable the "Request care team assistance" agentic workflow to create care team cases using Virtual Agent in Care Team Mobile or Care Team Portal.

Activate Now Assist in Virtual Agent for case intake

Activate Virtual Agent and set it to discoverable to enable case intake within the Request care team assistance agentic workflow.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **AI Agent Studio** > **Overview**.
2. In **Agentic Workflows**, select **Request care team assistance**.
3. In **Select channels and status**, navigate to **Virtual Agent**.
4. Toggle **Display** to on.
5. In **Assistants where AI Agents are discoverable**, select **Now Assist in Virtual Agent (default)**.
6. Select **Save**.

Result
Now Assist in Virtual Agent is now available to initiate the Request care team assistance agentic workflow.

Activate AI Assistant for Care Team Portal

Enable AI Assistant functionality in the Care Team Portal to provide intelligent assistance and support for healthcare workflows.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **Conversational Interfaces** > **Assistants**.
2. Select **Manage Assistants**.
3. Navigate to **Now Assist in Virtual Agent (default)** and select **Edit**.
4. Select **Edit chat features**.
5. Navigate to **Display experiences**.

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6. In **Chat experiences**, select **Add Portal**.
7. Select **Care Team Portal**.
8. Select **Save**.

Result
Now Assist in Virtual Agent is activated for use in the Care Team Portal.

Enable the Request care team assistance agentic workflow to create care team cases

Enable the Request care team assistance agentic workflow so that care team cases can be created using Now Assist in Virtual Agent.

Before you begin
Role required: admin

Procedure

1. Navigate to **AI Agent Studio** > **Create and manage** > **Agentic Workflows**.
2. Select **Request care team assistance**.
3. Navigate to **Select channels and status**.
4. In Virtual Agent, set the following fields:
   - Toggle **Display** to on.
   - In Assistants where AI agents are discoverable, select **Now Assist in Virtual Agent (default)**.
5. Select **Save**.

Result
The **Request care team assistance** agentic workflow is now enabled in Now Assist in Virtual Agent.

Enable Now Assist in AI Search for case intake

Enable AI search so that users can start the case intake process from the search menu in Care Team Portal.

Before you begin
Role required: admin

Procedure

1. Navigate to **All** > **System Properties**.
2. Select *glide.service_portal.enable_ais_portal.allow_list*.
3. In **Value**, add the `Care Team Portal` sys_id.
4. Select **Save**.

Result
The case intake process can now be initiated from the search menu in Care Team Portal.

Enable the Now Assist icon in Care Team Mobile

Set up the Now Assist icon within Care Team Mobile so you can leverage the **Request care team assistance** agentic workflow in Care Team Mobile.

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Before you begin
Role required: admin

Procedure
1. Navigate to **All** > **System Mobile** > **Mobile Builder**.
2. Select the **Care Team Mobile** application scope.
3. In **Screens**, select **Care Team Launcher**.
4. In **Quick Action Function Instance**, select **New**.
5. In **Properties**, enter a name for the icon.
   For example, Now Assist for Care Team icon.
6. Set **Icon** to **spark-solid (AIS)**.
7. Set **Function** to **Agent Chat**.

   Ensure that the Application scope value is **Now Mobile**.
8. Select **Save**.
9. Navigate to **All** > **Conversational Interfaces** > **Assistants** > **Manage Assistants**.
10. Select the Now Assist in Virtual Agent assistant.
11. In **Display Experiences**, navigate to the **Mobile Apps** tab.
12. In **Chat Launcher Functions**, select **Edit chat experience** and then select **Standard chat**.
13. Select **Apply**.
14. In **Prominent Action Button Override**, select **Edit chat experience** and then select **Standard chat**.
15. Select **Apply**.

Result
The Now Assist icon is accessible within Care Team Mobile. Users can select this icon to create support cases using the conversational abilities of Virtual Agent.

Promote Now Assist in Virtual Agent for Care Team Portal

The Request care team assistance agentic workflow can be promoted in Assistant Designer to show when using Now Assist in Virtual Agent.

Before you begin
Role required: admin

Procedure
1. Navigate to **Assistant Designer** > **Asset library**.
2. In Select assistant, select **Now Assist in Virtual Agent**.
3. In **Request care team assistance**, navigate to the additional options icon.
4. In Visibility, select **Promoted**.
5. Select **Save**.

Result
The Request care team assistance agentic workflow is now promoted for users and is selectable when using Now Assist in Virtual Agent in Care Team Portal.

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Activate the Care Team Operations Case Creation Voice AI Agent

Activate the Care Team Operations Case Creation Voice AI Agent to enable care team members to create and manage cases over the phone.

Before you begin

Role required: admin

For information on configuring and deploying AI Voice Agents, see Deploy AI voice agents.

Procedure

1. Navigate to **AI Agent Studio** > **Create and manage** > **AI agents**.
2. Select **Care Team Operations Case Creation Voice AI Agent**.
3. Navigate to **Select channels and status**.
4. In **Engage via voice assistants**:
   - Select **Allow**.
   - In Voice Assistants, add **Now Assist Voice Deployment**.
5. In Activation Status, toggle **This AI Agent is active** to Yes.
6. Select **Save**.

Result

The Care Team Operations Case Creation Voice AI Agent is now activated for use with Care Team Operations.

Configure Care Team Operations Case Creation Voice AI agent triggers

Change the trigger phrases used to call on the Care Team Operations Case Creation Voice AI agent via phone.

Before you begin

Role required: admin

About this task

By default, this agent is triggered when a user mentions Care Team Operations, CTO, or asks to submit a care team request. For example:

- "I need help with CTO"
- "I want to submit a Care Team Operations request"
- "Care Team"

These phrases can be adjusted for your use case as needed.

> **Important:**
> When updating these trigger phrases, use a unique value that is not used by any other installed agents to avoid those agents from erroneously being triggered.

Procedure

1. Navigate to **AI Agent Studio** > **Create and manage** > **AI Agents**.
2. Select **Care Team Operations Case Creation Voice AI Agent**.
3. In **Define the specialty**, navigate to **AI agent description**.

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4. Replace the existing instructions and examples with desired context.
5. Select **Save**.

Result
The Care Team Operations Case Creation Voice AI agent is now triggered on phone conversations based on the updated phrases and context you provided.

Manage domain intelligence for AI agents

When you install Now Assist for Healthcare Operations, a knowledge base article is added that lets agents in the Request care team assistance agentic workflow create different Care Team Operations cases.

Each Care Team Operations application has its own knowledge base article explaining case requirements, like required fields.

You can edit these articles to match your custom intake process when you require specific fields added or removed from the intake questions.

These articles can be found within the knowledge base for each Care Team Operations application:

Application	Knowledge base article
Care Team Operations for Biomed	CTO Biomed Case Definition and Submission Guidelines
Care Team Operations for Environmental Services	CTO EVS Case Definition and Submission Guidelines
Care Team Operations for Facilities	CTO Facilities Case Definition and Submission Guidelines
Care Team Operations for Healthcare IT	CTO HCIT Case Definition and Submission Guidelines

Note:
These articles have user criteria associated with them to help prevent care team members from accessing and editing these articles. Only users with the admin role for each scoped app can access and change those articles.

Using Agentic AI in Now Assist for Healthcare Operations

Use the Now Assist for Healthcare Operations AI agents within the Request care team assistance agentic workflow to create support requests using the conversational abilities of Now Assist in Virtual Agent directly within Care Team Mobile or Care Team Portal.

The following AI agents are used as part of this workflow:

Name	Description
Care team operations case intake AI agent	The care team operations case intake AI agent interacts with users seeking to create support requests conversationally through Now Assist in Virtual Agent in Care Team Portal or Care Team Mobile. It asks clarifying questions until it has the context needed for support request

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Name	Description
	creation, which it asks users to confirm before submission. The support request is then routed to the Care team operations case creation AI agent for case creation.
Care team operations case creation AI agent	The care team operations case creation AI agent creates cases for supporting services departments on the backend using the information gathered by the Care team operations case intake AI agent. Once these cases are created, support agents can fulfill them within the Healthcare Operations Workspace.

The Care Team Operations Case Creation Voice AI Agent allows you to create cases through natural, conversational voice calls.

Name	Description
Care Team Operations Case Creation Voice AI agent	The Care Team Operations Case Creation Voice AI agent allows users to create cases over the phone entirely through voice commands. It asks clarifying questions until it has the context needed for support request creation and confirms case information before the call is ended.

For details about these agents, including skills and triggers, navigate to AI Agent Studio within your instance.

Request care team assistance agentic workflow

Initiate a structured case intake process. Collecti all necessary information to create and log a support case for proper tracking and resolution by using the **Request care team assistance** agentic workflow in Now Assist for Virtual Agent.

Before you begin

Role required: sn_hco.care_team_member or sn_hco.care_team_manager

About this task

When you modify an agentic workflow, AI agent, or tool, make sure that you update all instructions accordingly.

This agentic workflow creates support requests of varying case types that are then sent to support departments for fulfillment.

The following Care Team Operations plugins contain the case types for this agentic workflow:

- Care Team Operations for Biomed
- Care Team Operations for Environmental Services
- Care Team Operations for Facilities
- Care Team Operations for Healthcare IT

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Procedure

1. In Care Team Portal or Care Team Mobile, select the chat widget button to open **Now Assist** in Virtual Agent.
2. Select **Request care team assistance**.
3. Describe one or more support requests in detail.
4. Respond to any questions asked by the Care team operations case intake AI agent to provide more context as needed.
5. Reply to the AI agent.
   - If the AI agent displays correct information for all support cases, reply **Yes**.
   - If information displayed isn't correct, respond **No** and provide additional information until the correct request information is captured.

Result

After confirming all request details are correct, the Care team operations case creation AI agent creates one or more cases for supporting service departments as needed. Case information will display in card form and you can select the case number to navigate directly to the case within Care Team Portal.

Cases created are fulfilled by users with the Support Agent role in the Healthcare Operations Workspace.

Note:
Upon conclusion of conversation, Virtual Agent creates an interaction record, which can be viewed within your instance at any time.

Care Team Operations Case Creation Voice AI agent

Use the Care Team Operations Case Creation Voice AI agent to create support request cases through conversational voice calls.

Before you begin

Role required: sn_hco.care_team_member or sn_hco.care_team_manager

About this task

he Care Team Operations Case Creation Voice AI agent lets users create support request cases entirely through voice commands. The agent asks clarifying questions to gather the context needed for case creation, then confirms case details before ending the call.

Note:
The Care Team Operations plugin for the relevant request type must be installed before the agent can create cases.

The following Care Team Operations plugins are supported:

- Care Team Operations for Biomed.
- Care Team Operations for Environmental Services.
- Care Team Operations for Facilities.
- Care Team Operations for Healthcare IT.

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To integrate this agent with supported third-party CCaaS (Contact Center as a Service) providers, see Integrating voice assistant with CCaaS provider.

For more information on setting up Voice AI Agents, see Deploy AI voice agents.

Procedure

1. Once CCaaS has been configured, call your configured telephone number to reach the agent.
2. When prompted, say how the agent can help you — for example, "I need to submit a Care Team Operations request", "I need help with CTO", or simply “CTO”.

   Note:

   These trigger phrases can be configured to your use case. For information on updating these, see Configure Care Team Operations Case Creation Voice AI agent triggers.

3. Enter your PIN when the agent requests it.
4. Answer any follow-up questions, providing relevant context about the issue.
5. Review the case details the agent reads backthen confirm to create the case or say no to have the agent make corrections.
6. Once the case is created and the agent confirms the details, end the call when prompted.

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