



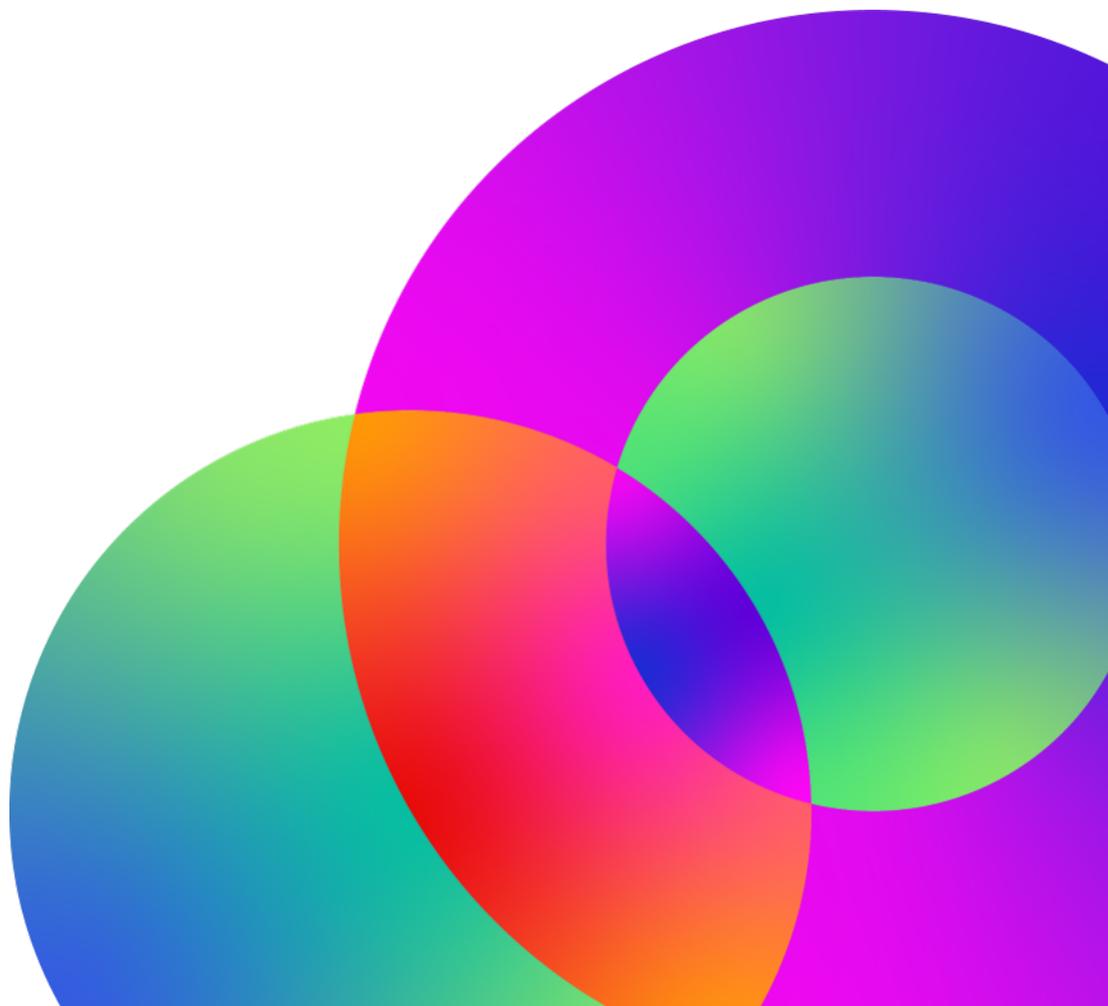
User Guide

symplr Provider

Version: 2021.2

September 2021

Rev. A



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symplr

symplr has been a partner that has the experience, stability, and personnel required to help your organization exceed expectations today and into the future. Our company has developed and evolved a comprehensive portfolio of products to serve as our clients' system of record for provider management and to improve all facets of operation. As a result, clients can focus their full attention to better serving their customers' needs.

Our philosophy

At symplr, we strive to promote long-term relationships with our clients by offering responsive and results-oriented support as well as by aggressively pursuing the latest technology and extending those benefits to our clients. You can be sure that we put our client's needs first.

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Welcome to symplr Provider

symplr Provider is designed to help the medical profession manage the complexities of provider enrollment, credentialing, and privileging in a single location in a manner meaningful to your specific organization. For every group, employer and provider you might choose to add to symplr Provider, you maintain and track many different kinds of information. Not only do you need to access these records in a meaningful way, you also need to be able to communicate with these individuals and groups. symplr Provider, a fully web-based, customizable credentialing system allows you to do just that.

symplr Provider includes three major components to manage your enrollment, credentialing and privileging:

- **Forms (on page 23)** - allow you to view and manipulate specific types of information found in provider and group records. System forms allow your administrator to customize the program implementation.
- **Documents (on page 55)** - allow you to communicate with any email address contained in your symplr Provider records.
- **Reports (on page 69)** - allow you to compile, print, and email information contained in your symplr Provider records.

Other components allow you to refine and streamline your processes:

- **Queries and filters (on page 29)** - allow you to pinpoint the specific records you want to view or manage.
- **Reference lists (on page 243)** - allows your administrator to populate many drop-down (menu) lists with data relevant to your organization or entity.
- **Manage distribution lists (on page 100)** - allows you to create groups of internal and external email recipients for distribution of reports.

In addition, symplr Provider includes online context-sensitive help, as well as **Optional modules (on page 254)** that clients can opt to use for their own particular needs.

Accessing symplr Provider

To help keep your data secure, symplr Provider requires a user name and password. There are two types of accounts, depending on your implementation.

SAAS implementation include additional security measures that include session inactivity timeouts and two-factor authentication. You can set some options in your user profile to determine how two-factor authentication works for you.

On prem implementations can use either the same single sign-on (SSO) as SAAS implementations, or use local accounts. Local accounts do not include inactivity timeouts or two-factor authentication, nor can you change your password from the sign in screen.

If you work with more than one entity, you will be prompted to select an entity when you log in. You can also switch between entities at any time.

Sign in and out

Use the following procedures to sign in and out of symplr Provider.

Single sign-on (SSO)

To log into the application, complete the following steps.

1. Open symplr Provider in your web browser.
2. In the log in page, enter your **Email** and **Password**, then click **Log In**.

Tip

If you forget your password, you can click forgot password link. Enter your email, and you will receive an email to reset your password.

3. If you are part of a multi-entity organization, in **Select Entity**, select an entity, then click **OK**.

Local account Log-in (On prem only)

To log in to an on prem installation of symplr Provider, complete the following steps.

1. Open symplr Provider in your web browser.
2. In the log in page, enter your **User ID** and **Password**, then click **SIGN IN**.

Tip

To view your password in plain text, click .

3. If you are part of a multi-entity organization, in **Select Entity**, select an entity, then click **OK**.

Sign out (all account types)

To sign out of the application, complete the following steps.

1. On the [Titlebar](#) (on page 21), click your user name, then from the list, select **Sign Out**.
2. Click **Yes**.

Change password

To change your password, complete the following steps.

1. On the [Titlebar](#) (on page 21), click your user name, then select **Edit Profile**.
2. Click **UPDATE PASSWORD**.
3. In **Change Password**, enter your old password, new password, then confirm your new password.
4. Click **UPDATE**.

Tip

SSO (Single sign-on) users can also click the forgot password link on the login screen.

Session timeouts

As part of the security protecting your data, session inactivity timeouts are set by your administrator. When your session times out, you are logged out of the system, and any unsaved work is lost.

Five minutes before your session is due to expire due to inactivity, you receive a warning. You can perform an action, such as saving your work, or opening a new work item, to reset the session timer.

When a session times out, the session state is saved, and you are returned to the sign in screen. When you sign back in, your previous session state reloads, but without any unsaved data.

Tip

To avoid data loss due to session timeouts, save your work often, and always save your work when leaving your computer.

Set two-factor authentication preferences

Two-factor authentication adds an additional layer of security. When you request a password change, you will receive a code to verify your identity either through your email or your cell phone.

The system defaults to email notifications. If you want to receive text messages to your cell phone instead, you will need to add the number to your user profile.

To edit your user profile, complete the following procedure.

1. On the [Titlebar](#) (on page 21), click your user name, then from the list, select **Edit Profile**.
2. In **Personal Info** under **Phone Number**, click **UPDATE PHONE**.
3. In **Change Phone Number**, enter your cell phone number, then click **SEND**.
4. Once received, enter the verification code, then click **OK**.
 - You can click **RESEND CODE** if you did not receive it, or if the code expires before you enter it.

Change entities

If you are part of a multi-entity organization, you can change the entity in focus at any time. To switch to a different entity, complete the following steps.

1. On the [Titlebar](#) (on page 21), click the entity name.
2. In **Change Entity**, select the entity name, then click **OK**.

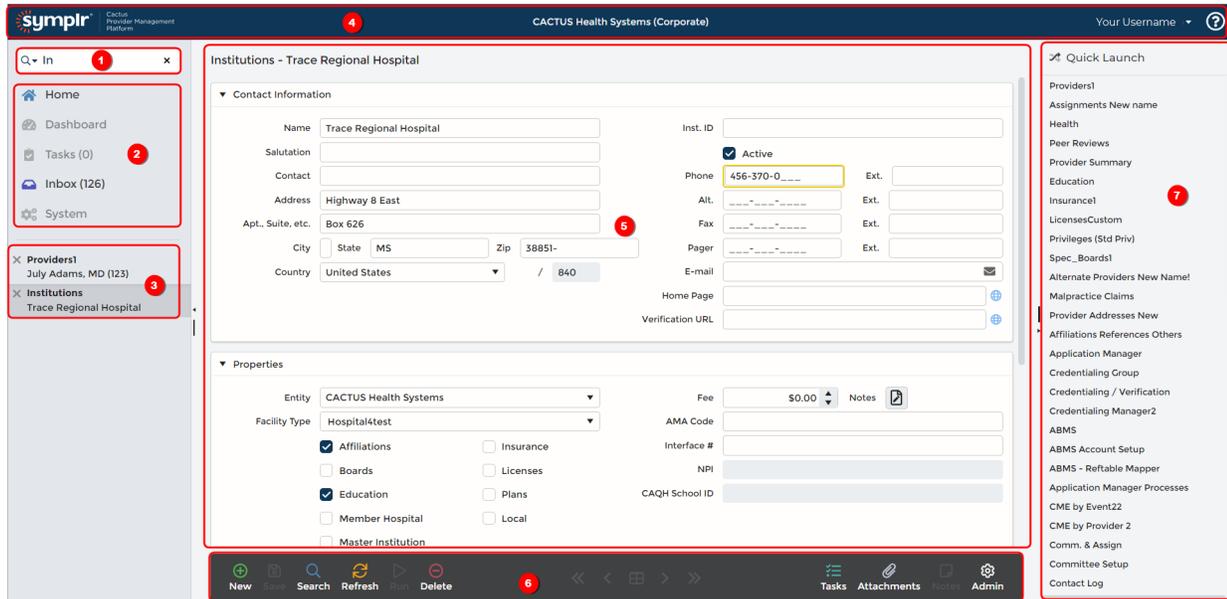
Note

To quickly locate the desired entity in a long list of available entities, in **Change Entity**, in **Filter entities**, begin typing the entity name.

Program layout

symplr Provider includes a number of organizational elements that help you find the information you need more quickly. Many of these items are always available, while others such as the toolbar and work items appear based on your activity.

The following example displays a typical application window divided into three panes. This example shows an open Provider record in the active work area. See the text below for an explanation of the numbered highlights.



1. **Global search (on the next page)** - allows you to search for forms, provider records, queries, and other items you need to view or manage.
2. **Hubs (on page 18)** - provide a centralized location to manage tasks, email, and administration tasks.
3. **Work items** - are open forms, queries, documents, reports, or profiles. You can have multiple open work items, and easily switch between them. (See [Work items](#) (on page 22))
4. **Titlebar (on page 21)** - allows you to select an entity, manage your account, access help and program information.
5. **Active work area** - shows the active open work item. This can be a form, a reference list, the inbox, and so on.
6. **Toolbar (on page 19)** - appears when there is an open work item or record and allows you perform actions on the open item.
7. **Quick Launch (on page 21)** - displays frequently-used forms. Your administrator populates this area.

Note

You can adjust the size of the panes or hide/show the left and right panes. using the icons in the middle of each of the pane dividers. Use the arrow to show/hide a pane. To resize the panes, hover over the line below the arrow, then click and drag to resize.

Global search

Use Global Search to find forms, provider records, queries, and other application items that you want to view or manage. Using global search, you can return a group of items, or drill down to a single item.

To find items, you first select a category using the list or typing in a two-character prefix, then refine your item search. You can return all items in a category, or a subset of items.

Search Categories

The following items are available in the Global Search list.

Category	Prefix
Providers	P:
Forms	F:
Queries	Q:
Documents	D:
Reports	R:
Profiles	O:
References Lists	L:
System Forms	S:
Groups	G:

Tip

When you search for and select any of the items above, you open a [Closing a work item in the left pane closes the item in the main window](#). Click **Close** to close a single item, or **CTRL+ Close** to close all open work items. (on page 22).

Search for an item

To search for an item, complete the following steps. Results matching your search criteria display in the **Search Results**.

- In **Global Search**, select from the list or type the two-character category prefix.
 - To return all items in the category, press **Enter**.
 - To return a subset of items, type in all or part of the item name, then press **Enter**.

Tip

Depending on the category, you can also perform a limited number of actions from the search results window.

- Providers and Groups** - Add new record.
- Forms, System forms, Reference lists** - Edit form security.
- Queries, Documents, Reports, Profiles** - Edit existing and add new. When you click an item to open, it opens in Run mode; when you click Edit, it opens in Design mode.

Hubs

Application hubs are listed as vertical tabs on the left side of the application. The program hubs include: **Home, Dashboard, Tasks, Inbox,** and **System**. The following table lists a summary of each hub.

Hub	Description
Home	<p>Provides a central location for creating and running:</p> <ul style="list-style-type: none"> Provider records Queries and filters (on page 29) Documents (on page 55) Reports (on page 69) Profiles (on page 78) <p>A banner message may appear at the top of the Home hub. Administrators can set this message in the Entities Master Setup system form. This message also appears on log on, and when a user changes entities.</p> <p>From the Home hub, you can also access your shortcuts and pins. (See Workspace customization (on page 127))</p>
Dashboard	<p>Displays Widgets (on page 48) that were added to the Team Dashboard and My Dashboard. From the Dashboard hub, you can add and remove widgets located on My Dashboard, and open the query linked to the widget.</p>

Hub	Description
Tasks	Displays the status of each task assigned to you and tasks you assigned to other symplr Provider users, if applicable. From the Tasks hub, you can create a new task and open an existing task. You can also open the Task Detail form from the Tasks hub to edit the task details and mark the task complete.
Inbox	Displays Reports (on page 69), Documents (on page 55), and Profiles (on page 78) that have been delivered or are waiting to be delivered. (See Manage inbox items (on page 101) for a review of additional Inbox features.)
System	Provides a central location for administering the Cactus system. From the System hub, you can quickly access forms to set up entities, users, and user groups, and update the provider display order.

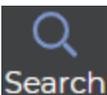
Toolbar

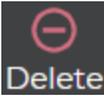
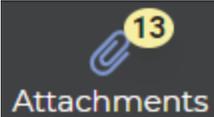
The toolbar appears when a work item is open and is located at the bottom of the screen. It provides several options related to the record or work item you are viewing. For instance, whenever you need to save an work item, you click **Save** on the toolbar.

The following table lists the toolbar buttons and their associated functions.

Tip

Toolbar buttons and menu items become available based on the work item in focus and your security rights.

Button	Name	Function
	New	Creates a new record of the type currently open in the application. The program searches the database for any duplicate records prior to creating the record.
	Save	Saves all changes made to the open record. This button is only enabled when there are pending changes in the open record.
	Search	Initiates a search for a new record of the type currently open in the application.

Button	Name	Function
	Refresh	Refreshes the open record by reloading it and reverting back to previously saved changes. In many cases, the refresh button will only be active once a record has been saved.
	Delete	Deletes the record in focus.
	Record Navigation	Navigates through available records as desired or opens the record in list view.
	Pin	Pins an individual record or creates a shortcut to the form that is in focus. Pins and shortcuts appear in the Home hub until manually removed.
	Tasks	Creates a new task associated with the record in focus.
	Attachments	Opens or closes the attachment viewer for the record in focus. When an attachment exists, the image turns blue and includes an attachment count for the record.
	More	Opens a menu of file management and security options that apply only to the record in focus.

Note

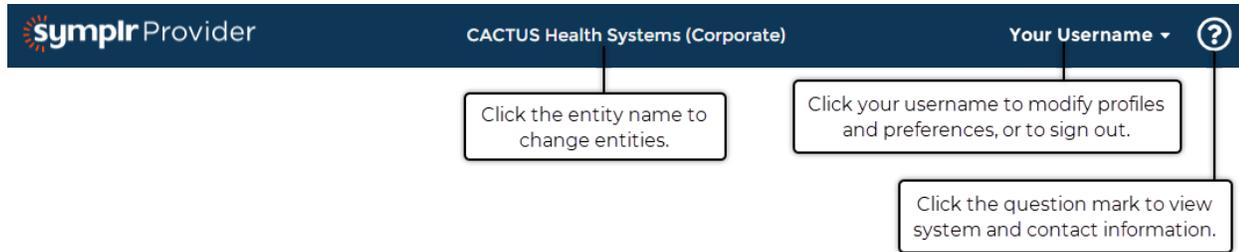
When a button is grayed out, it indicates that it is either the corresponding action isn't applicable currently applicable (for example **Save**), or permanently inaccessible due to security restrictions set by your the program system administrator. When an attachment or task is available, the button appears blue.

Titlebar

Upon entering the application workspace, you will see a titlebar running across the top. Items that may be accessed from the titlebar are noted below.

Note

The **Change Entity** dialog box or modal will appear only if your organization has licensed multiple entities.



Quick Launch

The Quick Launch list, located in the right pane of the workspace, displays frequently-used forms. Your program system administrator determines which forms are listed and the order in which they appear. Clicking an item in the Quick Launch list opens the corresponding form.

Tip

The items you see in Quick Launch are based on your security settings, so different users may see different entries.

Workspace item types

Many of the items you work with in the application can be categorized into one of the following areas.

- **work items** - You can search for work items in [Global search](#) (on page 17), and when you open any of these items, a work item entry will appear below the hubs in the left column.
- **affiliated items** - These items are attached to a work item. These include Tasks and Attachments, which are all available from the toolbar when you have an open work item. Affiliated items open in a separate window or work tray at the bottom of your active task.
- **integrated items** - Integrated items allow you to work with multiple work item types. These include Distribution Lists, the Inbox hub, the Send To feature, the Scheduler, Mass update options, and export provider data to SkillSurvey. (unbolded items coming in future releases)

Work items

When you open various items, such as a form, document, query, or profile, the name of the item appears as a link in the left pane below the application hubs. These links are known as work items.

Tip

A work item preceded by a small dot indicates the item contains unsaved changes. Save often to avoid losing data due to [Session timeouts](#) (on page 14).

- You can open multiple work items, and they will appear stacked in the order opened.
- You can navigate between open items by clicking a work item.
- Closing a work item in the left pane closes the item in the main window. Click **Close**  to close a single item, or CTRL+ **Close**  to close all open work items.
- When you open a linked item from your active work item, the new item will open as a separate work item.
- Only a single instance of the same work item can be opened at a time.
- You can quickly switch between providers in open work items, or open the same work items for additional providers.

Manage open work items

When you have open work items, you can quickly open the same work items for another provider, open additional forms for the same provider, or switch the open items to a provider in a focused query.

Open a single work item for another provider (Search)

1. Select an open work item.
2. In the [Toolbar](#) (on page 19), select **Search**.
3. In **Find Provider**, search for and select a provider, then click **OK**.

Switch multiple open work items for one provider to another (Shift + Search)

If you have multiple open work items for a single provider, you can quickly switch those items to a different provider.

Tip

If all original work items for a provider have been saved, the work items will be switched to the newly selected provider. If any work item in the original set has unsaved changes, the original set of work items will remain open and a new set of work items will open for the newly selected provider.

1. Select one of the open work items for the provider to switch from.
2. In the [Toolbar](#) (on page 19), hold down Shift and select Search.
3. In **Find Provider**, search for and select a provider, then click **OK**.

Open a selected form for the same provider (Shift + Quick Launch item)

1. Select an open work item for the provider.
2. In Quick Launch, shift + click the form you wish to open for the provider.

Open multiple work items for a focused query result

Tip

If all original work items for a provider have been saved, the work items will be switched to the newly selected provider. If any work item in the original set has unsaved changes, the original set of work items will remain open and a new set of work items will open for the newly selected provider.

1. [Run a query](#) (on page 30).
2. In the query results, select a provider.
3. Click focus .

Forms

Forms allow you to view and manage a specific type of information in a record, such as provider education or specialties, assignment types, group addresses, committee members, meeting attendees and so on. There are over 75 different forms to help you select the information you need.

Your organization can also rename forms to better suit your needs. If you can't find a form, contact your application system administrator.

You can access forms using:

- [Global search](#) (on page 17)
- [Quick Launch](#) (on page 21)

When you open a form, you will almost always be presented with the [Find \(Select\) Modal](#) (on page 114) to locate the record you want to view using the form. In most cases, this will be a provider record, but depending on the form, it could be for example, a group, a meeting, or a committee.

Once you select a form and a record, you will either be prompted to create a new record or the form will open in the [active work area](#). Many forms open in list view, while others open in detail view. List view displays a list of available records, and new records display at the bottom of the list. Detail view displays the detail for the selected record. In many forms, you can edit all or part of a record in either view.

Tip

Click  in the [Toolbar](#) (on page 19) to toggle between the two views.

Many forms are divided into collapsible sections, which allow you to focus on specific areas of the form. Click on the arrow next to the section name to expand or collapse the section. Some section headers may also include additional options, such as Find, Edit, or Remove. Once you expand a section, you will see many standardized [Field types](#) (on page 124) and [Grids](#) (on page 120) to view and enter information. Some fields may be prepopulated with existing record information, others will also be grayed out as read-only fields.

Some forms further organize information on separate tabbed pages. Click on a tab header to navigate to a specific page of information within a form.

Note

Administrators can set the access level to form fields. You may have read-only access to some fields described in this document. In addition administrators can access [System forms](#) (on page 216) to help manage the program and user access.

Manage form and reference list view

Both form list view and reference list views allow you to edit records directly in the list and also manipulate field columns. You can sort and filter by column, select the visible fields in list view, and change the order they display.

Note

Many forms contain child grids within form sections. These child grids cannot be managed in form list view.

Edit a field

Click in the cell you want to change. You will either be presented with a list of options or will be able to type in your information.

Add or Remove a field from view

When you add or remove a field from list view, you are selecting which fields are visible in the list view.

1. To add or remove a field, click **Manage Columns**.
2. Select the items to show in the grid.
3. Deselect the items to remove from the grid view.
4. Click **Refresh** to see your changes.
 - Added fields are appended to the end of column list.

Tip

When you click Select All in Manage Columns, the resulting behavior depends on the initial state of the columns.

Column status	Result when Select All checked
Some columns pre-selected	All columns appear in grid, with newly added appearing at the end.
All columns pre-selected	All columns become deselected.
No columns selected	All columns selected and added to grid in alphabetical (default) order, or in the order they were placed by the user previously.

Move a column

To rearrange the columns, drag-and-drop a column header to the new location in the list. Repeat for each column you wish to move.

Sort a column

To sort a column, click the column header of the column to sort. Click again to reverse the sort order.

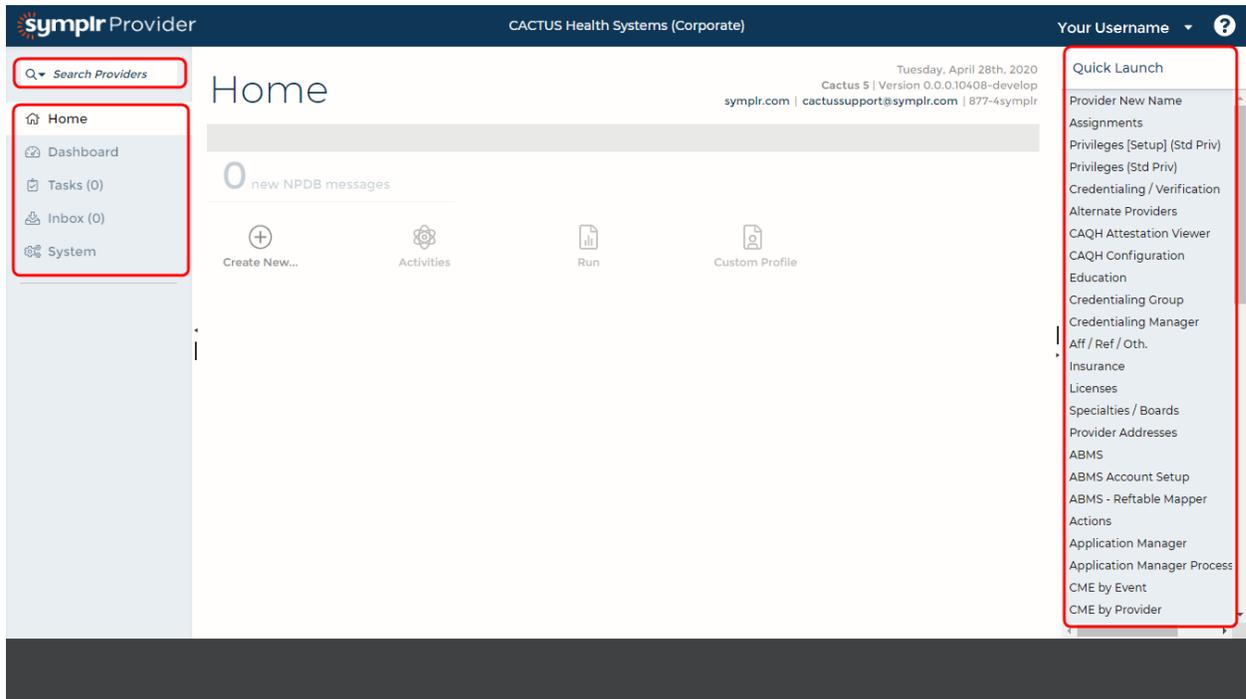
- Directional arrows appear in the header you are sorting to indicate ascending or descending sort order.

Filter a column

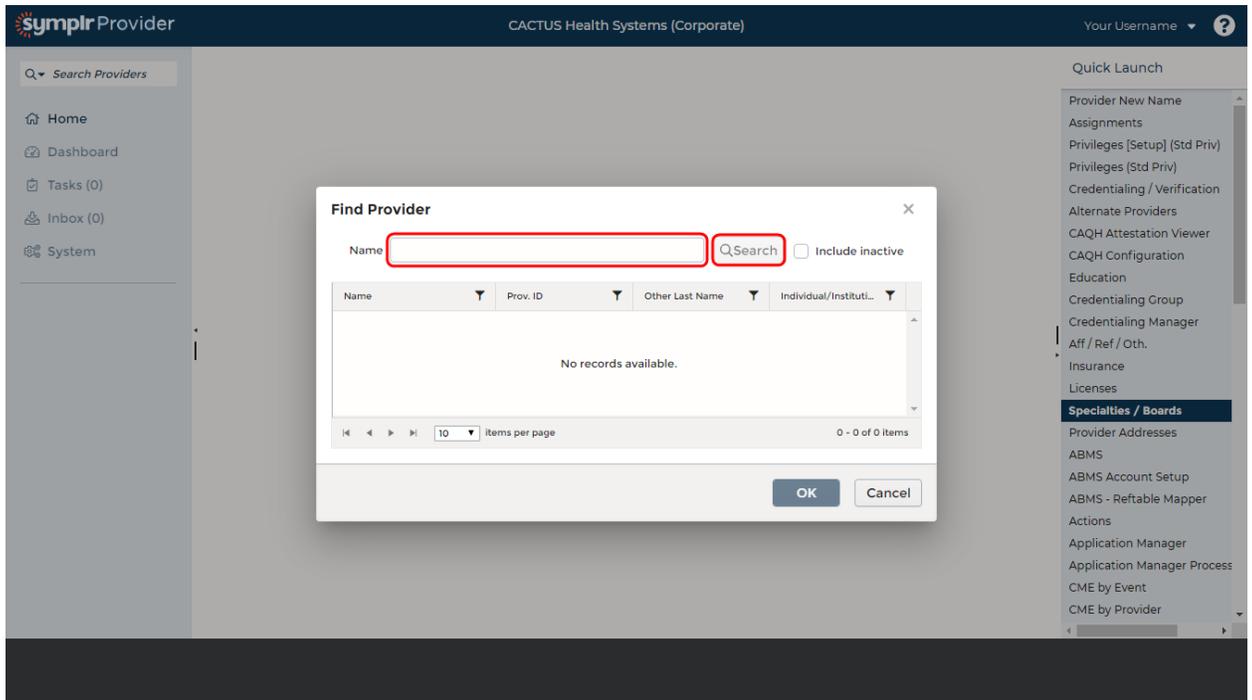
1. To filter a column, in the column header, click Filter .
2. Enter the criteria for your filter, then click **Filter**.
 - The criteria selection will vary depending on the type of field selected.
 - You can filter one or more columns at a time.
 - Filtered columns are indicated by a reverse background Filter .
3. To clear a filter, click Filter , then click **Clear**.

Example form workflow

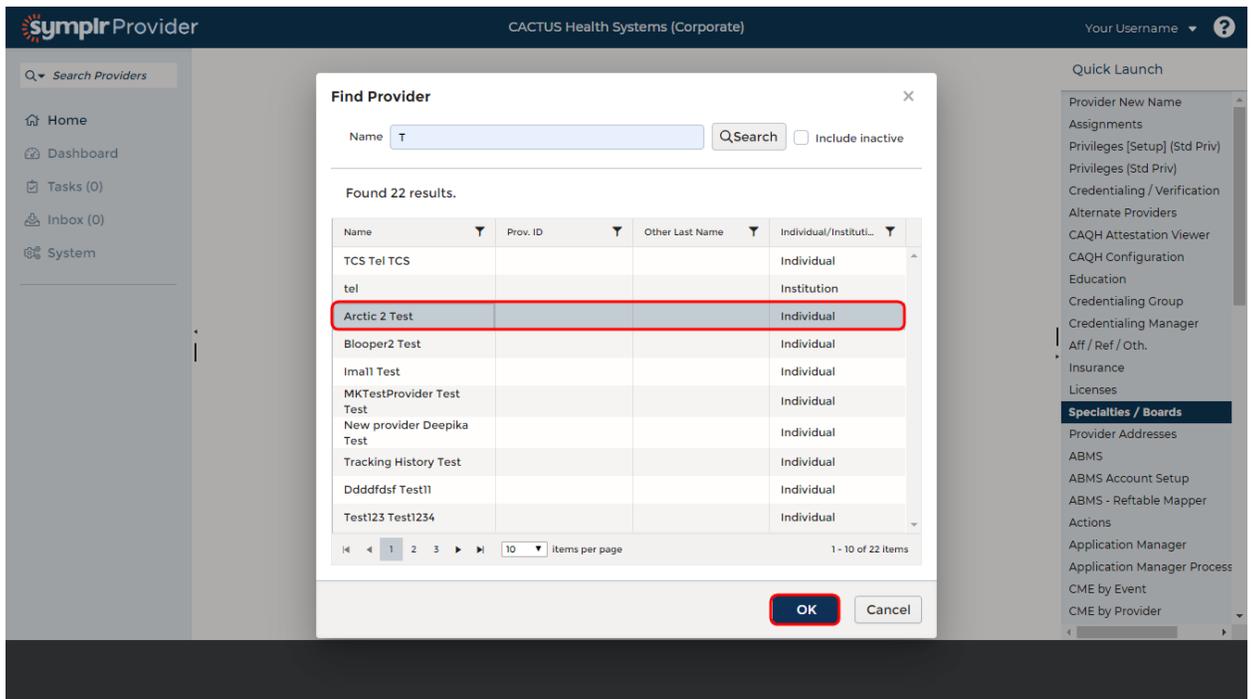
1. **Form Selection.** Select the form you want to work on using one of the available methods (Search, Hub, Quick Launch).



2. **Record Selection.** In the resulting **Find (Select) Modal** (on page 114), you to search for a record based on the selected form. In this case, the search is for a provider record.
 - a. Perform an initial search by filling in all or part of a name, then clicking Search.

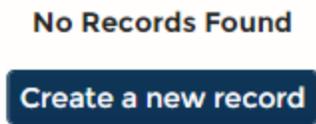


- b. Select a record, then click OK.



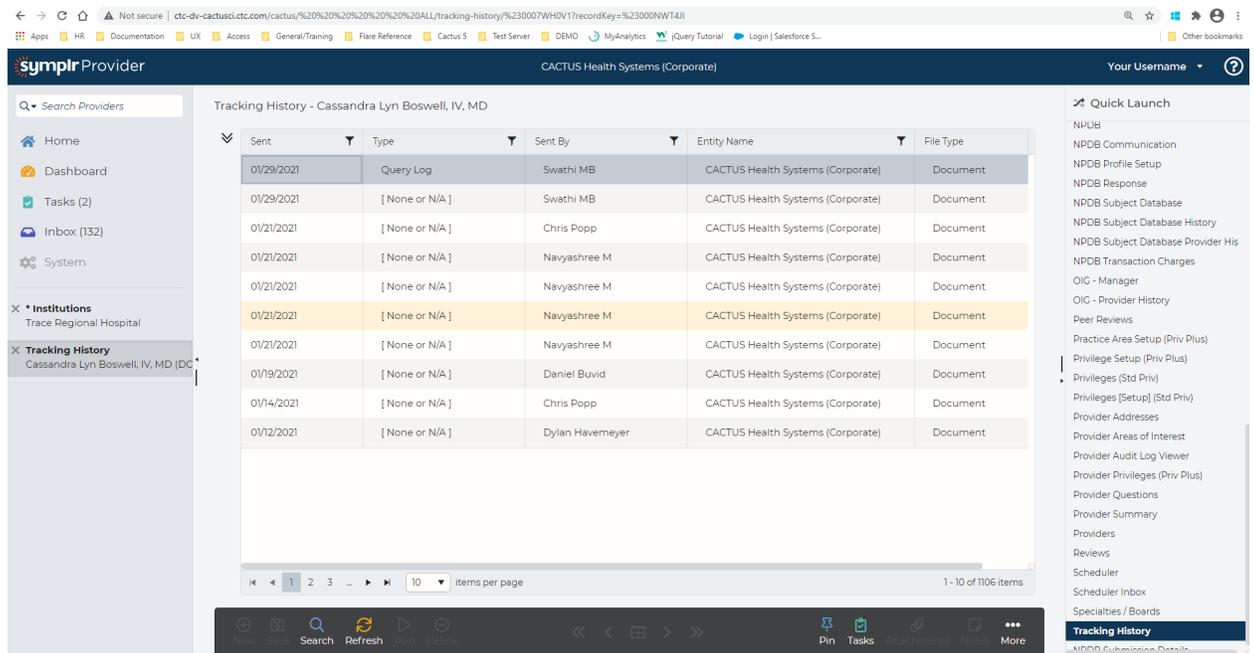
3. **Form presentation.** Once you have selected a form and record to view, you will generally see one of three types of windows appear. You may be prompted to create a new record, be presented with a list of records, or a form with individual fields will appear in the active work area. Note that once you open a work item, a link to that item is listed in the left pane, and the symplr Provider toolbar appears at the bottom of the window.

- When no record is found, you click create a new record to continue.

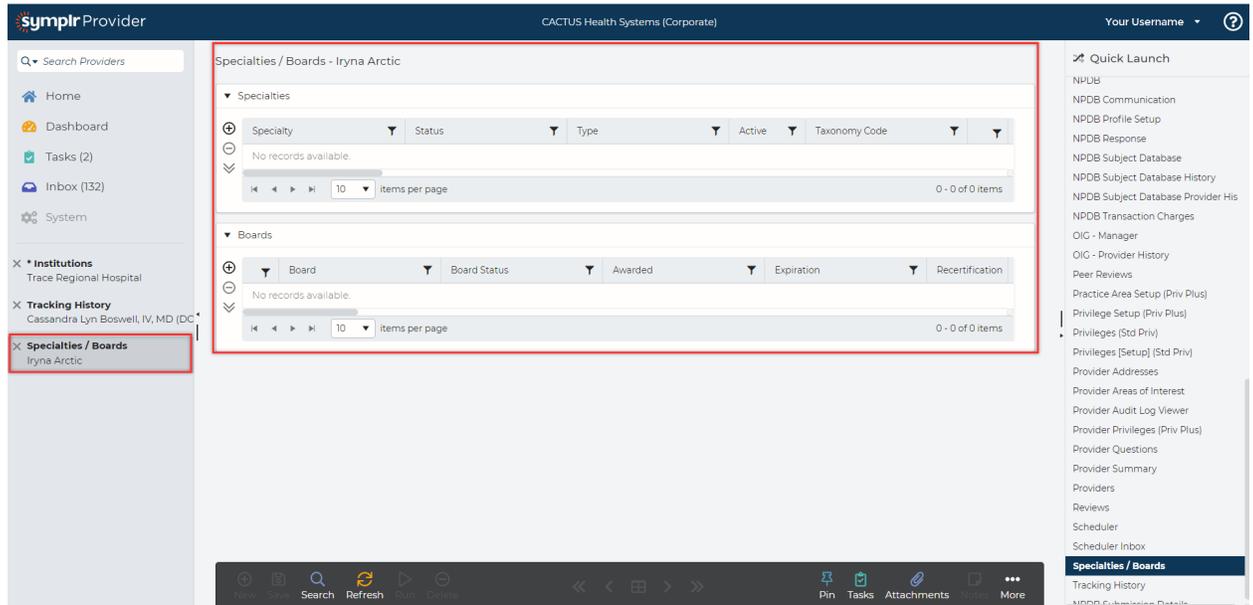


Note
 The records maintained by symplr Provider are intricate; a provider record, for instance, can contain multiple sub-records. A single provider may have multiple addresses, have attended multiple educational institutions, or hold multiple licenses. If you are entering the first instance of such a sub-record, you will see the prompt above.

- When multiple records exist, you are presented with a selection list. Select a record to continue.



- Example form once a single (or new) record has been selected with the form and work item highlighted.



Queries and filters

Queries are a powerful tool that can help you find and manage your data. Use queries and filters to help create meaningful reports and maintain accurate records. For instance you can create a query to find all active providers in a specific department or find a list of providers who have not submitted an NPI number. By setting focus on a query, you can also quickly switch related open work items to the [primary record](#)¹ in your query for data cleanup.

A query is made up of fields and filters that the application uses to retrieve the data you need. Query results can be exported to PDF, Excel, or sent to a symplr Provider form, such as the NPDB form. You can also use the query results to create a new document or report. Depending on your security rights, you can access a query in run or edit (design) mode.

Note

Only a single instance of the same query can be opened at a time.

A filter limits the results generated from a query. Add filters to a query to help you find only the data you want to see, such as providers with a specific specialty or records where no value has been input in a specific field.

Note

Queries and filters are dynamic, and do not store data. This means the results will always reflect the current state of the data in your query fields.

¹Primary records can be any of the following record types: provider, institution, group, or address.

The query form is divided into the following tabbed pages.

- **Setup** - allow you to edit your query fields when in edit mode.
- **Filters** - allow you to edit and run filters on the active query.
- **Results** - allow you export your query to PDF or Excel, or send it to a symplr Provider form. Additional mail merge formatting is also available.
- **Linked Items** - allows you to add Dashboard widgets and view linked items.

Tip

You can run queries from Global Search, the Home hub, the toolbar, and related queries.

Run a query

symplr Provider offers several methods to generate query results.

1. To open a query, select one of the following methods.

Run a query from the Global Search box

- a. In Global search, search for a query.
- b. In the **Search Results**, select the query.

Run a query from the Home hub

To run a query from the Home hub, complete the following steps.

- a. In the **Home** hub, click **Run** .
 - b. On the **Queries** tab, select a query, then click **OK**.
2. Optional. If you want to change the value of a filter, on the **Filters** tab, click **Edit** , then apply your changes.

Note

Changes made to the filters are temporary and will not be saved when you close the query.

- Optional. To merge related records, on the **Results** tab, select **Advanced Mail Merge Format**.

Tip

By default, each record in a query is merged into Word or Excel as a separate entry. When **Advanced Mail Merge Format** is applied, related records are merged into a single entry. For instance, if you are corresponding to providers regarding licenses, mail merge will combine the licenses for a single provider into a single record so only one letter is sent to each provider.

Date field issue when creating a Word document from a query exported into Excel

When you create a Word document using a query that has been exported in to Excel, the date fields may not appear in the correct format. This is an issue caused by Microsoft Word and Excel. You may experience this issue in the following situations.

- Advanced Mail Merge Format is selected, creating multiple dates within one column in the Excel spreadsheet.
 - A column has a record with no value. For example if a provider in the query doesn't have a DOB then all providers DOB fields are translated to the number of days since 01/01/1900.
- To view your query results, click **Run**.

Queries and data cleanup

Queries can help you quickly find data that needs revision or cleanup. Once you find a query result to edit, you can quickly switch the focus of related open work items to the query results records with [Set query focus](#) (on the next page). Related work items are any work items that contain the fields included in your query. Unrelated work items are not affected by this process.

Example

You have two work items open for Provider 1: a provider record, and an education record. You run a query on Provider 2's education records. When you set focus on Provider 2 in the query, the open work items will switch to Provider 2.

There are some safeguards in place to ensure that no unsaved data is lost.

- If there are no related open work items, no work items will be opened.
- If any of the related open work items have unsaved information, the query-focused work items will open below the existing unsaved work items.

Example

You have two work items open for Provider 1: a provider record, and an education record. You have updated, but not saved the education record. You run a query on Provider 2's education records. When you set focus on Provider 2 in the query, you will have two open work items for both Provider 1 and Provider 2.

Set query focus

To set a query in focus and open the related records for the selected entry, complete the following steps.

Prerequisite

Before you set focus, open a set of related work items, such as a provider record and an education record.

1. [Run a query](#) (on page 30).
2. Select the record to focus on, then click Set Focus .

Create a query

When you create a query, you create a basic framework, then add fields to the query from a form. As you add fields from the form, you use paint mode to select fields to include in your query and query filter.

Tip

Open the forms you wish to use in this query before you start. You can quickly open multiple forms in Quick Launch by using shift+click during selection.

Complete the following steps to create and populate your query.

1. Create a query framework

- a. Create a new query using one of the following methods.

Situation	Steps
Global Search box	<ol style="list-style-type: none"> 1. Search for a query. 2. In the Search Results, click New Query.
Home hub	<ol style="list-style-type: none"> 1. In the Home hub, click Create New, then select Query.

- b. In the **Basic Setup** section, enter the **Query Name** (required).
 - i. The **Table Name** is automatically populated with the query name you entered (with spaces removed).
- c. Optional. Enter a **Description** for your query.

2. Add fields to the query and filter (Paint Mode)

Tip

When you are in paint mode in a query, you cannot add data to a form. When a query is in paint mode, a small green brush  appears next to the query work item. Only one query at a time can be in paint mode.

Using paint mode, you can add form fields to your query.

- a. Select **Paint Mode**.
 - A green paint brush appears next to query where paint mode is active.
 - b. Switch to the form (in work items) and complete the following substeps.
 - i. To add a field to **Results**, click the field once or until it is painted green. 
 - ii. To add a field to **Results** and **Filters**, click the field twice or until it is painted green and a blue filter image appears. 
 - iii. To add a field to **Filters**, click the field three times or until it is outlined with a green border and a blue filter image appears. 
 - c. Optional. Repeat the above steps to add additional fields to your query.
3. Switch back to the query, then click **Save**.

Edit a query

Once you create a query, you have some options to refine how your query results display.

Shared file types (symplr Provider Documents, Reports, and so on) are driven by shared queries. Anything changed in the Results, Filters, or Linked Items of a shared query will be changed for all user groups and entities that share the query. This may significantly alter or "break" multiple shared files. When a user attempts to make such a change to a shared query, a Warning dialog appears and lists all documents drawing information from the shared query.

1. Search for a query.
2. In **Search Results**, select **Edit**  next to a query to edit.
 - Alternatively, you can open a query and select **Edit**.
 - You may not have rights to edit the particular query. Consult with the symplr Provider system administrator at your organization to obtain rights to edit the query.
 - The query may be linked to another file, such as a document or report. Queries linked to another file may also be edited by accessing the query through Edit mode of the document, report, etc.
3. In edit mode, select any of the following optional steps to edit your query.

Tip

To edit query filters, see [Manage filters](#) (on the next page).

Remove a field

In **Results Setup**, highlight the row to remove, then click Remove .

Add a field

See [Add fields to the query and filter \(Paint Mode\)](#) (on the previous page).

Display/Hide fields

When you add a field to your query, **Display** is selected by default in **Results Setup**.

- To hide a field, deselect **Display**.
- To show a field, reselect **Display**.

Sort columns

You can sort by one or more column headers.

In **Results Setup**, click **Sort** for each field to sort.

- In the **Results Sort Order**, select a record sort order using the single-headed arrow (ascending/descending).
- If multiple headers have been selected you can rearrange the column order using the double-headed arrows.

View field properties

In **Results Setup**, highlight the row to view, then click View Details .

Manage a query

In addition to creating and editing a query, you can copy, inactivate, and delete queries.

Copy a query

You can create a new query using the fields and filters of an existing query. This creates a new query in your work items. To copy a query, complete the following steps.

1. Open the query you want to copy.
2. On the [Toolbar](#) (on page 19), click **More > Save As**.

3. In the **Basic Setup** section, in **Query Name**, type a unique name for the query.
4. Click **Save**.

Tip

If you attempt to copy a query with unsaved changes, you will be prompted to save the changes first.

Inactivate a query

To inactivate a query, complete the following steps.

1. Search for the query. (See [Search for an item](#) (on page 18))
2. In the **Search Results**, click **Edit**  next to the query you want to inactivate.
3. In the **Setup** tab, in the **Basic Setup** section, deselect **Active**.
4. Click **Save**.

Delete a query

To delete a query, complete the following steps.

Note

To maintain data integrity, sympplr recommends you inactivate a query instead of deleting it.

1. Search for the query you want to delete.
2. In the **Search Results**, click **Edit**  next to the query.
3. On the [Toolbar](#) (on page 19), click **Delete**.
4. To confirm deletion, click **Yes**.
5. Click **Save**.

Manage filters

The application offers several methods for managing query filters. In addition to standard functions (add, edit, inactivate, and remove), you can also reorder a filter list, and apply [Advanced filter options](#) (on page 40).

To perform any of the optional activities, open a query, then click on the filters tab.

Add a filter

See [Add fields to the query and filter \(Paint Mode\)](#) (on page 33)

Edit a filter

To edit a query filter, complete the following steps.

1. Open a query.
2. On the **Filters** tab, in the filter you want to change, click **Edit Filter** .
 - When a filter is in edit mode, the Edit Filter  background is shaded.
3. Optional. To rename the filter, in the filter name box, type the new name.
4. To specify the filter criteria, select the appropriate operation values for your filter.
 - The available options vary depending on the type of data. You may see a date selector, a list of values, or a text box.
 - When available, you can select [Smart Date filter](#) (on page 39) and enter additional settings to eliminate the need for reentering the date each time the query is run.
5. Click **Save**.

Inactivate a filter

When a field is added to a query as a filter, it is marked active by default. To inactivate a filter, complete the following steps.

1. Open a query.
2. On the **Filters** tab, deselect the check box next the filter.
3. Click **Save**.

Remove filters and filter fields

1. To remove a filter from a query, select one of the following methods.

Situation	Steps
Remove the filter from the query	<ol style="list-style-type: none"> 1. Locate the filter you want to remove and, to the right of the filter name, click Remove .
Remove the filter fields from a form	<ol style="list-style-type: none"> 1. Select Paint Mode. 2. Open the sympplr Provider form from which you want to select filters for removal. 3. Press Ctrl, then click the field to remove it from the filters. 4. Repeat for each field to remove from the filter.

2. Click **Save**.

Add a filter key

Add a filter key to narrow down query results to a specific provider, credentialing instance, credentialing group, or group practice. To add a filter key to a query, complete the following steps.

1. Open a query.
2. Select **Paint Mode**.
 - A green paint brush  appears next to query work item where paint mode is active.
3. Open the **sympplr Provider** form containing the filter key  to be used in the query.
 - There are four filter keys in sympplr Provider. They are located on the Providers, Credentialing, Credentialing Group, and Group Practices forms.
4. To add the key to the query filters, click the key three times or until it is painted with a filter 
 - The field is added as a filter in your query and marked active.
 - When selecting filter options, you can query on a list of values, or on query results.
 - The key field does not show in the Results Setup table under Setup.
5. Click **Save**.

Ask to run a filter

Ask to run  allows a user who cannot otherwise edit filters to view and *temporarily* change a filter value when running a query. This option is set by the query filter creator.

To enable this functionality, complete the following steps.

1. Open a query.
2. On the **Filters** tab, in the filter you want to the user to view and temporarily change, click **Ask to run**.
 - When this functionality is enabled, the Ask to run  background is shaded.
3. Click **Save**.

Reorder filters

When a sympplr Provider field is added to a query as a filter, by default, it is added to the bottom of the list of filters. To reorder filters within the filter list, select one of the following methods.

Situation	Steps
Drag-and-drop	<ol style="list-style-type: none"> 1. Hover over the filter to move until you see the drag-and-drop crossed double arrows . 2. Click and drag the filter to the desired position. 3. Click Save.
Move a filter to the top or the bottom of the list.	<ol style="list-style-type: none"> 1. In the filter to move, click , then select Move to top or Move to bottom. 2. Click Save.

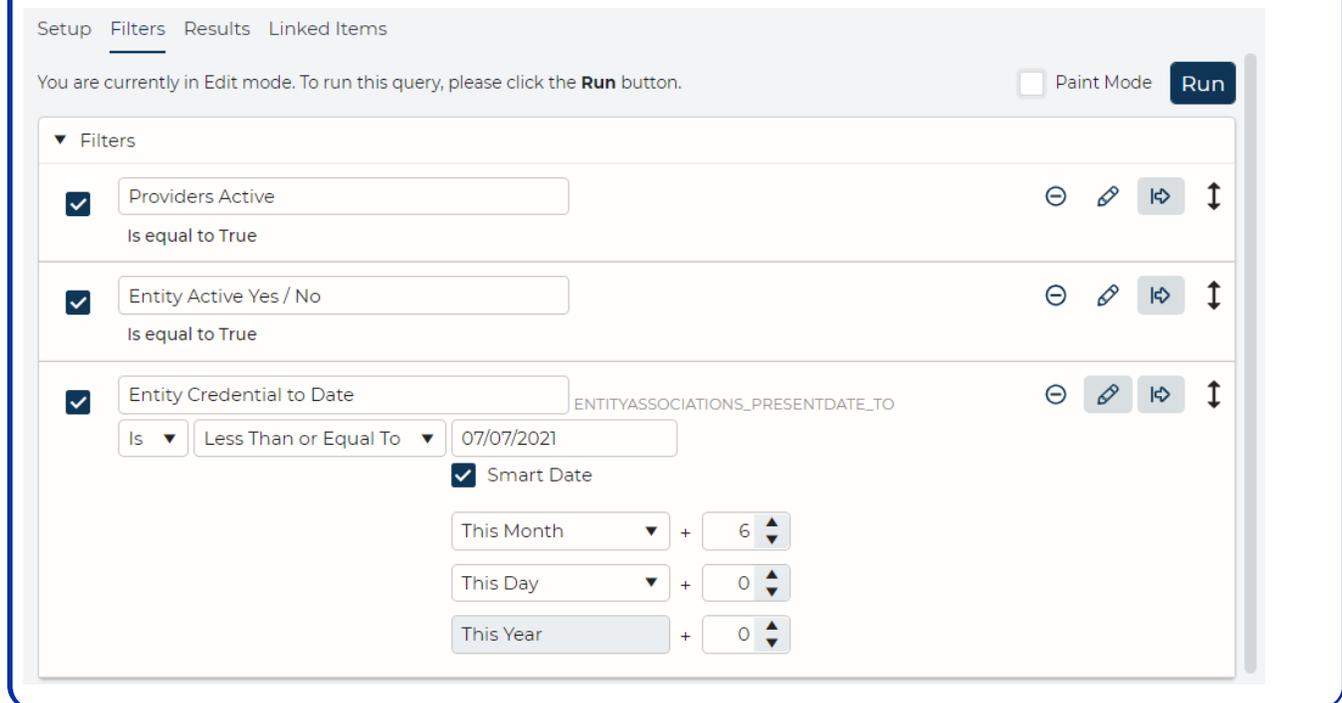
Smart Date filter

When editing a query filter involving date criteria, you can choose the Smart Date option. This time-saving feature allows you to run a query without having to first update the date criteria. With Smart Date enabled, symlr Provider automatically updates the date criteria for you using the settings defined in the filter.

Example

On the first of every month, you want to use the **Appointment Expirations** query to determine which providers are to be reappointed in six months. To return these results, symlr Provider must first know which date to use. You don't want to manually update the date filter every time you run the query, so you enable the **Smart Date** feature instead.

To set up the **Smart Date** filter, you open the query in **Query(edit mode)** and select the **Smart Date** option in the **Entity Credential to Date** filter. You select **This Month**, enter **6**, and save your changes. This indicates you want the date field to automatically populate with the date that is six months from the day you run the query. By making this one-time change, you no longer need to update the date filter each time you want to run the query, saving you valuable time.



Create a Smart Date filter

The Smart Date filter eliminates the need for reentering the date each time a query is run. To create a Smart Date filter, complete the following steps.

1. Open a query, then click **Edit**.
2. On the **Filters** tab, expand the **Filters Setup** section, then click **Edit** .
3. In the corresponding filter drop-down lists, select the desired options.
4. Select the **Smart Date** check box to view additional date options.

5. Select the appropriate values from the drop-down lists provided.
6. Click **Save**.

Advanced filter options

When you run a query, symplr Provider generates results from the provider data stored in your database that meet the filter settings of the query. Utilizing more advanced types of filtering, such as linked queries, complex groupings of filter clauses, and custom outer joins will allow you to manipulate queries to display only the results that meet your criteria.

Nested queries

- [Linked queries](#) (below)

Complex groupings

- [Use advanced filtering](#) (on page 44)

Custom outer joins

- [About outer joins](#) (on page 45)
- [Types of outer joins](#) (on page 45)
- [Use outer joins to alter query results](#) (on page 46)

Linked queries

By creating a query that filters results with the help of additional linked queries, it is possible to reveal data that does not exist in symplr Provider. Query-linking (creating a query that references the results of one or more other queries), allows you to find and eliminate gaps in recorded provider information.

In addition to finding gaps in recorded provider information, the ability to link queries in symplr Provider may also be used for reporting on a particular result set or modeling complex relationships between several sets of query results.

Example

The following example demonstrates how to use linked queries to produce query results that display entity information for all providers with no state license records in symlr Provider. You create the first query to identify the providers with state licenses, then reference the first query in the second query to identify who was not included in the first query.

Step 1: Create query A (Providers with state licenses)

Create a query that will produce a list of providers in your database that have an "active" entity status and a state license record.

Filters: Your filters should appear similar to the following.

The screenshot shows a 'Filters' section with two entries:

- License Type: Is equal to State License
- Providers Active: Is equal to True

Each filter entry includes a search input field, a minus sign icon, an edit icon, a link icon, and a vertical double-headed arrow icon.

Results: Your results should appear similar to the following.

	Providers Full Name	License Type	License Number	License State
<input checked="" type="radio"/>	Hugh Adams, M.D.	State License	BA3462860	MN
<input type="radio"/>	Ellen M Moore, MD	State License	878787	MO
<input type="radio"/>	William F Maurer	State License	35029260	OH
<input type="radio"/>	Earl Ah-Moo	State License		MN
<input type="radio"/>	flava flav, degree of spice	State License	123456789	MO
<input type="radio"/>	Ann P Demo	State License	TESTING	MO
<input type="radio"/>	Ann P Demo	State License	101	MO
<input type="radio"/>	Arctic	State License		KS
<input type="radio"/>	Aaa Aaaw	State License	BA3462860	MN
<input type="radio"/>	Asda Sda Asda	State License	BA3462860	NY
<input type="radio"/>	Anne Attachments	State License	789456	KS
<input type="radio"/>	Jutta E Moore	State License	12345	Nc
<input type="radio"/>	Jaime Alison Aaronson	State License	268599	MN
<input type="radio"/>	Jaime Alison Aaronson	State License	268599	MN
<input type="radio"/>	Ryan Westhoff, MD, MD	State License	6898564	CA
<input type="radio"/>	Ryan Samuel	State License		KS
<input type="radio"/>	Andrew Quinton	State License		KS
<input type="radio"/>	CAQH 1 CAQH 1	State License	25MB06219100	NJ
<input type="radio"/>	CAQH 1 CAQH 1	State License	25MB06219100	NJ

items per page

Step 2: Create query B (Providers without state licenses)

Create the second query that identifies the providers that are not in the results of query A. This is accomplished by adding the **Providers Key** as a filter and setting the criteria to "Is Not in the results of Query A."

Tip

To add the Providers Key to a query, while in paint mode, select the **Provider key**  in the Providers form, just as you do any other field to include in the query. In this case you would choose to add to the query results and filter the key . (See [Create a query](#) (on page 32)).

The Entity Active Yes/No filter has been added to insure that you only include active entities.

Filters: Your filters should appear similar to the following.



The screenshot shows a 'Filters' panel with two active filters. The first filter is 'Entity Active Yes / No' with the condition 'Is equal to True'. The second filter is 'Providers Key (Current Provider)' with the condition 'Is Not in the results of Jb qry A'. Each filter has a checkmark on the left and a set of control icons (minus, edit, copy, and up/down arrows) on the right.

Results: Your results should appear similar to the following.

	Providers Full Name	License Number	License Type
<input checked="" type="radio"/>	PCK Demo	B3452	DEA Certificate
<input type="radio"/>	Carter G Abel	BA3462859	DEA Certificate
<input type="radio"/>	Joanne L Albout, MD	BA3462859	DEA Certificate
<input type="radio"/>	Edwina R. Schmidt, MD	D565575	PDS Enrollment-EJCH
<input type="radio"/>	Kathi Amber Earlesne, MD	E464654	ECFMG
<input type="radio"/>	Edward Aul, MD	EA647364	DEA Certificate
<input type="radio"/>	Kathi Amber Earlesne, MD	G766434	State License
<input type="radio"/>	Edie Lahman, MD	H329846	DEA Certificate
<input type="radio"/>	Michael Proctor, MD	K10754-MM45-23	DEA Certificate
<input type="radio"/>	Demo Ryan, DPM	KS12345	CSR
<input type="radio"/>	Johnathan Coleman Adams, II, MD1	MA9483291	DEA Certificate
<input type="radio"/>	Edie Lahman, MD	MO89263	ECFMG
<input type="radio"/>	Cassandra L Ryan, 12345, DPM	MR1229776	DEA Certificate
<input type="radio"/>	Cassandra L Ryan, 12345, DPM	MR1229776	DEA Certificate
<input type="radio"/>	Johnathan Coleman Adams, II, MD1	MA9483291	DEA Certificate

Navigation: 7 8 9 25 items per page

Note

You can also link to already linked queries. For instance, you could build another query on query B that includes entity information. In this case, you would again use the Providers key, but instead link to the results of query B.

Use advanced filtering

Advanced filtering can be used when filtering more than one column from a single table within the sympplr Provider database, such as the Providers table, and creating complex groupings. Complex groupings of filter clauses, such as "or" clauses, can be especially helpful with data clean-up tasks.

Note

The Enable Advance Filtering option is only available when more than one column from a single table exists.

To use advanced filtering, complete the following steps.

1. Open a query, then click Edit.
2. On the **Filters** tab, in **Advanced Filter Setup**, select **Enable advanced filtering**.
3. Select the check boxes of the filter clauses you want to group.
4. Optional. To use the "or" clause, from the **And** list, select **Or**.
5. Click **Group**.
6. Click **Save**.

Tip

Any changes to your filters are immediately reflected in advanced filtering. Also, if you change the filter order, you will need to uncheck **Enable advanced filtering** to see the changes.

About outer joins

Joins describe the manner by which each column of data in a table relates to columns of data in other tables. Outer joins can be used to increase the usefulness of a query's results.

When are outer joins used?

symlr Provider automatically assigns join functions to help you get the best results from a query. However, there may be times when a query must be manually altered to produce the most accurate results. The Outer Join Manager allows you to control the data to include in the query results set.

Types of outer joins

There are three types of join options possible in symlr Provider: Default, Custom, and Specific. The following table lists the outer join options available and the action symlr Provider performs when enabled.

Outer join option	If enabled
Default	symlr Provider will choose the outer joins for you. The Default option forces a join for all records not specifically excluded by filters. That is, if one of the fields in the query results has no data in it for a selected record, symlr Provider will force the join and display the incomplete record fields in the results. This is the default option used for all queries, unless otherwise specified, so that you can view and amend the incomplete data.
Custom	In certain situations, it is desirable to include in the results providers who possess incomplete information. Selecting the Custom option forces symlr Provider to join together all tables included in the query. This option is appropriate when looking for records that don't exist in the database, for example, it will result in displaying all providers with or without a data element. This option is useful for locating providers with missing data in symlr Provider.

Outer join option	If enabled
Specific	Sometimes, you may want to join only select tables. Selecting the Specific option provides you the ability to turn on/off specific outer joins to generate more accurate query results. This option is useful when, for example, you would like to see only those providers that are linked to a specific group practice.

Use outer joins to alter query results

To alter query results using outer joins, complete the following steps.

Warning!

Each outer join controls very specific behaviors within the **Query (edit mode)**. Improper management of outer joins can result in reduced query performance.

1. Open a query. then click **Edit**.
2. On the **Query Setup** tab, in the **Basic Setup** section, click **Outer Join Manager**  .
3. Select the appropriate outer join option.
 - If you choose **Specific**, you will also need to specify which tables to include.
4. Click **OK**.

Query results

Once you run a query, you have several options. You can export the results to PDF or Excel, create a document or report, or email the information to providers and institutions.

symplr Provider allows you to send providers or institutions from the results of a query to any number of symplr Provider forms, including: ABMS, Application Manager Console, CAQH Bulk Upload, CAQH Roster Generation, CME by Event, Comm. & Assign.: Meetings & Attendance, Committee Setup, Contract Manager, Credentialing Group, Credentialing Manager, Exclusion Screening, Flat File, Group Practices, Mass Update - Insurance, Mass Update - Licenses, NPDB, NPDB Subject Database and the OIG - Manager.

You can also merge query results with a Word document to create for instance individualized letters to each provider in your query results. See [Link a new Word document to a query](#) (on page 59).

Manage query results

You run a query to create and manage a subset of records. Perform any of the optional activities below from the query Results tab.

Export to PDF or Excel

1. Click **Export**, then select either **PDF** or **Excel**.
2. In the bottom left of your screen, click the file link to open the exported item.
 - To see a list of several downloaded items, click **Show All**. Alternatively, you can open your Windows download folder.

Tip

You can export a query directly to Excel without running the query first. This is useful for large queries that require a lot of processing.

Send query results to symplr Provider forms

You can send providers or institutions from the results of a query to a selection of symplr Provider forms or records. Currently, these include the Provider form and Provider Entity records.

To send the query results to a particular symplr Provider form, complete the following steps.

1. [Run a query](#) (on page 30).
2. On the **Results** tab, click **Send To**, then select the desired option (destination) for the query results.
3. Use the subsequent dialog boxes to complete the process of sending the query results to the desired form.

Create a document or a report

To create a new document or report from your query results, see [Create a document](#) (on page 58).

Link a Word document to a query

To link a Word document to a query, see [Link a new Word document to a query](#) (on page 59).

Manage linked items

symplr Provider offers several methods for managing items related to a query. When you update field name values in a query (Setup or Filter tabs), the values will also be updated in Linked items to prevent widgets from being broken. When items that exist in Linked items are removed from the Setup tab, they will also be removed from Linked items.

To manage linked items, complete any of the following procedures.

- [Create and publish a widget](#) (on page 49)
- [Add existing widgets to a Dashboard](#) (on page 53)
- [Remove widgets](#) (on page 54)

Warning!

Shared file types (symplr Provider Documents, Reports, and so on) are driven by shared queries. Anything changed in the Results, Filters, or Linked Items of a shared query will be changed for all user groups and entities that share the query. This may significantly alter or "break" multiple shared files. When a user attempts to make such a change to a shared query, a Warning dialog appears and lists all documents drawing information from the shared query.

Widgets

A widget is a graphical representation of query results that you can add to your dashboard or your team dashboard. Widgets display dynamic information that automatically updates at regular intervals.

Depending on the information you include in the underlying queries, some widgets allow you to click **Open**  to view an underlying record, or click on a section of a pie chart to view detail in the **Query Results Viewer**.

Tip

You can also arrange and resize your widgets and open the underlying query directly from the dashboard. (See [Arrange widgets](#) (on page 129))

Widget types in symplr Provider

Symbol*	Widget Type	Description
	Record Count	Displays the number of records generated from a query.
	Chart	Displays query results in a chart, such as a bar chart or pie chart.
	List	Displays a query in miniature form. This allows you to have the query results always updated and available without having to rerun the query.
	Time Gap	Displays query results based on data gaps, such as breaks in education, employment, or insurance history.
	Advanced Count	Displays query results as calculated record counts.
	Counts in Time Periods	Displays query count totals.
	Duration	Displays query results in number of days.

*The widget symbol appears in the upper left of each widget title to help identify the widget type.

[Related topics](#)

[Widget settings](#) (on the next page)

Create and publish a widget

To create a widget from a query, complete the following steps.

1. Open a query, then click **Edit**.
2. On the **Linked Items** tab, in the **Dashboard Widget Setup** section, click **Add** ⊕.
3. Click **View Details** ∨.
4. To rename the widget, in **Title**, type the new name.
5. In the **Type** list, select the type of widget to create.
 - See [Widget settings](#) (below) for more information about the different widget types.

Note

For **Time Gap** and **Duration** widgets, if the **Period Start** value is not null, and the **Period End** value is null, the current date is used to render the calculation.

6. Optional. To publish the widget to a team dashboard, complete the following steps.
 - a. In the **Team Widget access at this Entity** grid, click **Add** ⊕.
 - b. In **Add User Groups**, select one or more groups, then click **OK**.
7. Click **Save**.
8. To publish the widget to your personal dashboard, complete the following steps.
 - a. Click the **Dashboard** hub.
 - b. In the Dashboard, click the **Personal** tab.
 - c. Click **Add** ⊕.
 - d. In **Add Widgets**, select the widget you just created, then click **OK**.

Widget settings

The following tables outline the individual settings for each type of widget. You can pair multiple queries to build a widget. For instance you can:

- Query for gaps in education, then find the duration of those gaps.
- Find providers with licenses in the first query, then from that query find providers without licenses and display a record count.

Warning!

Due to the possibility of breaking a document, report, or packet, symplr Provider does not allow you to create a widget (in Run mode) from a query that is linked to a document, report, or packet.

Record Count

The Record Count widget counts records. When using single table results, the widget counts the number of records. When using multiple tables (relational data), you must specify the count table.

Use the following settings to customize the **Record Count** widget.

Setting	Description
Refresh Interval	Indicates how often (in minutes) the server updates the widget data. To avoid unnecessary strain on the server, this should be set higher for larger widgets and for widgets used less often.
Count Table	The database table producing the count. Unless you are using relational data, the table will be selected for you.

Chart

Here you select a field to categorize, then the different items in each category are counted to create a chart. For example, you could have a result with address information, and if you selected the Address Type as your category field, the system would produce a chart of how many addresses of each type there are in the system.

Use the following settings to customize the **Chart** widget.

Setting	Description
Refresh Interval	Indicates how often (in minutes) the server updates the widget data. To avoid unnecessary strain on the server, this number should be set higher for larger widgets and for widgets used less often.
Style	The type of chart, such as pie chart or bar chart.
Category Field	The data in the selected field displays in the chart.

List

Displays the results of the query directly in a widget. This allows users to have easy access to a query result that is automatically refreshed without having to manually run the query. The List widget allows you to open records directly from the query.

Use the following settings to customize the **List** widget.

Setting	Description
Refresh Interval	Indicates how often (in minutes) the server updates the widget data. To avoid unnecessary strain on the server, this number should be set higher for larger widgets and for widgets used less often.

Time Gap

This widget can display gaps in education and work history, or gaps in insurance or licensing coverage. The underlying query must include a "subject" (usually a provider) that has a start and end date for the selected history/coverage. The widget examines date ranges and their respective overlaps or gaps. You must also specify the minimum number of days in a gap (Maximum Gap) to be shown in the widget. You can open records directly from this widget, so you must also specify which form to open.

Use the following settings to customize the **Time Gap** widget.

Setting	Description
Refresh Interval	Indicates how often (in minutes) the server updates the widget data. To avoid unnecessary strain on the server, this number should be set higher for larger widgets and for widgets used less often.
Display Column	The data in the selected column displays the widget.
Period Start	The date representing the beginning of a time gap or duration.
Period End	The date representing the end of a time gap or duration. If the Period Start value is not null, and the Period End value is null, the current date is used to render the calculation.
Maximum Gap	The number of days allowed before the widget displays a time gap.
Form	Indicates the form from which the data is being pulled.

Advanced Count

This widget is designed to work with Relational Data results (multiple tables) to produce counts of child records of a "root" record (usually a Provider). For each root record, the configured Display Column is shown with the count of the child records. You can open records directly from this widget, so you must also specify which form to open.

.This widget is designed to work with Relational Data results (multiple tables) to produce counts of child records of a "root" record (usually a Provider). For each root record, the configured Display Column is shown with the count of the child records. You can open records directly from this widget, so you must also specify which form to open.

Use the following settings to customize the **Advanced Count** widget.

Setting	Description
Refresh Interval	Indicates how often (in minutes) the server updates the widget data. To avoid unnecessary strain on the server, this number should be set higher for larger widgets and for widgets used less often.
Display Column	The data in the selected column displays in the widget.
Count Table	The database table producing the count. Unless you are using relational data, the table will be selected for you.
Comparison	The comparison operators (such as greater than or equal to) and the number to compare with the data.
Form	Indicates the form from which the data is being pulled.

Counts in Time Periods

This widget creates a graph that displays a count of a data point by a specified time period such as a month, quarter, or year. Use the following settings to customize the **Counts in Time Periods** widget.

Setting	Description
Refresh Interval	Indicates how often (in minutes) the server updates the widget data. To avoid unnecessary strain on the server, this number should be set higher for larger widgets and for widgets used less often.
Date Column	The date needed to establish a time period.
Time Period	Identifies the time period (by month, month and year, quarter, quarter and year, or year) displayed in the widget.

Duration

Designed to keep track of the duration of processes with a beginning and end date, such as Credentialing Instances. Required fields include a primary value to display, a start and end date to determine the duration, and an optional focus column to supplement the primary display value. You can open records directly from this widget, so you must also specify which form to open.

Use the following settings to customize the **Duration** widget.

Setting	Description
Refresh Interval	Indicates how often (in minutes) the server updates the widget data. To avoid unnecessary strain on the server, this number should be set higher for larger widgets and for widgets used less often.
Display Column	The data in the selected column displays in the widget.
Focus Column	Sets the second part of what is displayed in the first column of the widget.
Period Start	The date representing the beginning of a time gap or duration.
Period End	The date representing the end of a time gap or duration. If the Period Start value is not null, and the Period End value is null, the current date is used to render the calculation.
Form	Indicates the form from which the data is being pulled.

Add existing widgets to a Dashboard

You can add multiple widgets at one time to your personal dashboard from the dashboard hub. You add widgets to the team dashboard singly through the underlying query.

Add widgets to your personal dashboard

1. Click the **Dashboard** hub.
2. In the Dashboard, click the **Personal** tab.
3. Click **Add** ⊕.
4. In **Add Widgets**, select one or more widgets, then click **OK**.

Add widgets to your team dashboard

Note

If a user group is to have access to their widgets at multiple entities, the administrator must grant the user group access to those widgets at each entity separately.

1. Open the query on which the widget is based, then click **Edit**.
2. Click the **Linked Items** tab.
3. Select a widget from the grid, then click **View Details** .
4. In the **Team Widget access at this Entity** grid, click **Add** .
5. In **Add User Groups**, select one or more groups, then click **OK**.
6. Click **Save**.

Export query results from a widget

To export query results from a widget, you open the query from the widget, then export it from the query.

1. In the **Dashboard** hub, locate the desired widget, then click the **3-dot menu**  located in the top-right corner of the widget.
2. Click **View Query**.
3. On the **Results** tab, click **Export**, then select the desired export format.
A pop-up message may appear at the bottom of your screen prompting you to open or save.

Remove widgets

You can remove widget access separately for either My Dashboard or a Team Dashboard, or delete a widget completely from the system.

Remove widget access from your personal dashboard

1. Click the **Dashboard** hub.
2. In the Dashboard, click the **Personal** tab.
3. In the widget to remove, click on the 3-dot menu , then click **Remove Widget**.

Remove widget access from a team (retaining widget in system)

You can remove a group's access to a widget from the underlying query.

1. Open the query on which the widget is based, then click **Edit**.
2. Click the **Linked Items** tab, expand the **Dashboard Widget Setup** section.
3. In the **Team Widget access at this Entity** grid, next to the user group, select **Delete** .
4. Click **Save**.

Delete a widget from the system

When you remove a widget from the underlying query, it is removed for all users.

1. Open the query on which the widget is based, then click **Edit**.
2. Click the **Linked Items** tab, expand the **Dashboard Widget Setup** section.

3. In the **Dashboard Widget Setup** grid, select the widget to delete, then click **Delete** .
4. Click **Save**.

View linked documents and reports

To view all documents and reports related to a query, complete the following steps.

Note

You must have administrator [access rights](#) to link a query to a document, report, or packet.

1. Open a query, then click the **Linked Items** tab.
2. In the **Linked Items** section, click Open  next to the item to open.

Documents

A document is a Microsoft Word file that can be uploaded and merged with symplr Provider records to then be downloaded or emailed from the system. Depending on the [security rights](#) granted to you by the system administrator at your organization, you may run, create, and/or edit a document in symplr Provider. You can also turn on tracking history to record details about the document, such as date sent and recipients.

You can search for documents using [Global search](#), or create new documents via the Global search results, [Hubs](#) (on page 18) or through a query.

Note

While both documents and reports contain data from symplr Provider records, the usage is somewhat different. Documents merge records with a Word document to create individualized information that is specific to each recipient. Reports are similar to a single spreadsheet of information sent to a distribution list.

See your Word documentation for more help on merging with Word.

Running a document

When you run a document, the program generates a file containing data from the query linked to the document. Several documents already linked to queries are provided for you, allowing you to quickly generate a document whenever you need it. All documents appear in the Inbox hub where you can view, download, email and track queued, scheduled, and completed documents.

A document may contain filters that you can modify before you run the document. Any changes you make to the filters are temporary and will not be saved after you run the document.

Editing a document

If you have the necessary security rights, you can create a new document and link it to the query of your choice. You can also edit the document's formatting and layout, and define a default action for the system to perform when a user runs a document. For example, if you have included provider email addresses in

the query results linked to a document, and select email as the default delivery method, when a user runs the document it is delivered to the email address listed for each provider.

Note

A user can temporarily modify the default settings when running a document; however, such modifications will not be saved.

Query images, logos, and document output

You can include images in your queries that you also add to your documents. How query images appear in your documents depends on the situation.

- If the query has multiple images from different tables for the same provider, the provider will only appear once and the email for that provider will contain multiple attachments.
- If the query contains images but the document does not, the document will not contain images.
- If you wish to add a logo to your document, upload it from your local machine to your Word document. You cannot merge images from S:Entities Master Setup.
- If you run a document with multiple images and a Word or Excel document, you will not be able to combine the multiple attachments into one.

Document delivery settings

When you run a document, symplr Provider performs the default action as defined in the Document form (design mode) to deliver it, though these default settings can be temporarily modified at run time.

The following table lists the available delivery settings and the corresponding action when the setting is enabled.

Delivery setting	If enabled
<p>Output Format</p>	<p>Emailed documents will be delivered as PDF attachments to the email, and downloaded documents will download as Word (.docx) files.</p> <div data-bbox="553 1413 1461 1661" style="border: 1px solid blue; border-radius: 10px; padding: 10px;"> <p>Note Changes made to the .docx file after document generation are not saved in the program. The altered .docx may be printed and/or saved to the user's local machine. Clicking the Deliver Now button after the original .docx has been modified still delivers the unaltered, original .docx file.</p> </div>
<p>Preview Prior To Delivery</p>	<p>The document is generated and may be viewed in the Inbox hub prior to distributing.</p>

Delivery setting	If enabled
Email/Subject	The email addresses listed in the query (linked to the document) are used to email the document as an attachment. Text entered in the Subject box is included in the subject line of the email.
Printer	Available printers are based on your computer settings. Select your own printer settings after downloading a document from the Inbox.

Warning!
Delivering documents linked to a flat file

If you deliver a document that is linked to a flat file, every provider will get the information for all providers included in the query.

Run a document

Several methods are available for running a document. To run a document, complete any of the following procedures.

1. Select one of the following methods to select a document to run. (Other methods coming soon!)

Run a document from the Global Search box

- a. In Global search, search for a document.
- b. In the **Search Results**, select the document.

Run a document from the Home hub

- a. In the **Home** hub, click **Run** .
- b. On the **Documents** tab, select a document, then click **OK**.

2. In the **Document** screen, on the **Run** tab, perform the following actions.
 - a. In the **Review Filters** section, review and edit filters as needed.
 - b. In the **Settings** section, select an **Output Format** and enter an **Email Subject**.

Note

The "Email Subject" is the subject line the provider will see if/when the document is emailed to them.

3. Click **Run Document**.

Note

If "Email Automatically" was selected, the document will be emailed to the provider. The document will also be delivered to the "Inbox" hub for your reference.

4. When prompted to close the document, click **Yes**.
5. If "Email Automatically" was not selected, go to the **Inbox** hub and select the appropriate action ("Email" or "Download") for the document.

Create a document

When you create a new document, you enter information about file properties on the Design tab, then link your document to a query. This prepares the path for linking a Word document or for setting tracking.

To create a new document, complete the following steps.

1. To open a new **Document** form, perform one of the following procedures.
 - The form opens on the **Design** tab.

Situation	Steps
Global Search	<ol style="list-style-type: none"> 1. In the Global Search field, type D: and click Enter. 2. In the Search Results, click + New Document.
Home hub	<ol style="list-style-type: none"> 1. In the Home hub, click Create New. 2. Select Document from the list.
A query	<ol style="list-style-type: none"> 1. Run the query. 2. On the Results tab, click New. 3. Select Document from the list.

File Properties section

- a. In **Description**, type a unique description for the document.
- b. Optional. In **Category**, select a category that best describes the document.
- c. Optional. To create a brief summary description, click **Description Details** , type a description, then click **OK**.

Query Properties section

- a. If the **Query** field is blank, complete the following steps.
 - i. Click **Find** .
 - ii. In **Find Query**, select a query, then click **OK**.
- b. Optional. To edit the query, click **Open** .

- c. Optional. Select **Format Results using Advanced Mail Merge Format** to merge related records.
 - By default, the query will return one document per record. When you merge the results, related records, such as multiple license or education record types, display in a single document.
- d. Optional. Click **Download**  to download the query results to your computer.

Note

The system will return the top 10 records, not the entire data set.

- e. Optional. In **Flat File**, select the flat file to use with your document.

Word Document section

See [Link a new Word document to a query](#) (below).

Settings section

To track when a document has been generated for a provider, complete the following steps.

Note

Tracking History records are written back to the Tracking History form for the provider at the time a document is emailed or downloaded from the Inbox, not when generated.

- a. Select **Tracking History**.
- b. Optional. In **Type**, select a tracking type.

Note

If additional tracking types are required, contact your symplr Provider system administrator.

2. Click **Save**.

Link a new Word document to a query

In order to link a Word document to a query, you download records to Excel so you can embed the field names in Word. Once you have made the field links, you build your merge document, then upload it into symplr Provider.

Prerequisite

- You have completed the steps in [Create a document](#) (on the previous page) and have the document open.
- You have access to both Microsoft Excel and Word (version 2007 or later).

Warning!

Word documents created in Google docs are not currently supported.

1. In **symplr Provider**, download query records to Excel.
 - a. In **Document** (design mode), in **Query Properties**, click **Download** .
 - The first 10 records of your query download to your computer in an Excel spreadsheet.
2. In **Excel**, verify you are pulling the correct type of data and that you can edit the file.
 - a. Open the Excel file.
 - b. If required, click **Enable Editing**.
3. In **Word**, connect the Word document to the Excel fields, and build the merge document.
 - a. Open a new Word document.
 - b. Click the **Mailings** tab.
 - c. From **Select Recipients**, select **Use an Existing List**.
 - d. In **Select Data Source**, select the **Downloads** folder.
 - e. Select the Excel file of the query you downloaded above, then click **Open**.

Tip

If you receive an error that the external table is not in the expected format, verify that editing is enabled on the Excel file, then try again.

- f. In **Select Table**, click **OK**.
- g. Build your merge document as desired.
 - To insert any query fields, place your cursor where you want to display the merge field information, then in the **Mailings** tab, select **Insert Merge Field**, and select the desired field.

Note

Microsoft Word's mail merge functionality allows you the flexibility to create complex documents, such as envelopes, mailing labels, or those requiring the use of advanced features like [Create an If...Then...Else... statement](#) (on page 64).

- h. Optional. To merge user account information stored in the symplr Provider **Users - Master Setup** system form, such as the user's name and title, into the Word document, see [Creating a user signature](#) (on the next page).
- i. Optional. To modify the format of a merge field, see [Modify merge field format](#) (on page 64).
- j. Optional. To insert an If...Then...Else... statement within your document, see [Create an If...Then...Else... statement](#) (on page 64).
- k. Save and close Word.
- l. Close Excel.

4. In **sympplr Provider**, upload the newly created Word document and save the file.
 - a. In **Document** (design mode), in the **Word Document** section, click **Upload** .
 - b. Navigate to the Word file you just created, select it, then click **Open**.
 - c. Click **Save**.
 - d. Optional. To run the document, click the **Run** tab.

Customizing documents

By building your documents in Word, you can edit them in a familiar environment, then merge them with sympplr Provider records to produce individualized documents, such as letters and labels.

Using mail merge

Use Microsoft Word's mail merge functionality to create complex documents, such as envelopes, mailing labels, or those requiring the use of advanced features like "If...Then...Else" statements.

If...then...else...statements

If...Then...Else... statements are useful when sending documents that require different instruction, depending on a particular data element. An example of a document using an "If...Then...Else" statement would be a letter that populates a salutation of "Dear Sir" or "Dear Madam" as determined by the Gender field of the provider's record (if Gender = 'F', then populate 'Madam') contained within a query's result set.

To create complex documents using Microsoft Word's mail merge functionality, Microsoft Word version 2007 or later is required.

Creating a user signature

In addition to merging data from queries, you can also use mail merge to create documents that contain unique information about the user sending the document. For example, a user can send multiple documents with his/her name appearing in the signature line without having to manually type the name in each document.

The data displays when the document is printed.

The following table lists the user fields available for merging and the information each would populate if used within a document.

User Merge Field	Description
<<ENTITYNAME>>	The entity the user is logged onto
<<USERDATABANKTITLE>>	Title of user
<<USERNAME>>	Full name of user
<<USEREMAILADDRESS>>	Email address of user
<<USERPHONE>>	Phone number of user

User Merge Field	Description
<<USEREXTENSION>>	Phone extension of user
<<USERFAX>>	Fax number of user
<<USERFAXEXTENSION>>	Fax extension of user
<<USERSALUTATION>>	Salutation of user
<<USERID>>	User's ID

Example

If you wanted to replicate this signature:

You would type these user merge fields into Word:

Drake Ramoray	<<USERNAME>>
Credentialing Coordinator	<<USERDATABANKTITLE>>
University Hospital	<<ENTITYNAME>>
(555) 555-5555	<<USERPHONE>>
dramoray@uh.com	<<USEREMAILADDRESS>>

Common merge field switches

The following tables list common merge field switches you can use with your Word documents when merging with sympplr Provider.

Date fields

Merge Code	Data Output
{MERGEFIELD dateofbirth_of_providers}	9/25/61
{MERGEFIELD dateofbirth_of_providers \@ "MMMM d, yyyy"}	September 25, 1961
{MERGEFIELD dateofbirth_of_providers \@ "d MMMM yyyy"}	25 September 1961
{MERGEFIELD dateofbirth_of_providers \@ "MMM yy"}	Sep 25

Numeric fields

Merge Code	Data Output
{MERGEFIELD default_credits_of_cmeevents}	3
{MERGEFIELD default_credits_of_cmeevents \# 0.00}	3.25
{MERGEFIELD default_credits_of_cmeevents \# \$0.00}	\$3.25

Phone fields

Merge Code	Data Output
Merge Code	Data Output
{MERGEFIELD contactphone_of_providers}	8007762305
{MERGEFIELD contactphone_of_providers \# (###)-###-####}	(800) 776-2305

SSN fields

Merge Code	Data Output
{MERGEFIELD ssn_of_providers}	123456789
{MERGEFIELD ssn_of_providers \# ###-##-####}	123-45-6789
{MERGEFIELD ssn_of_providers \# "xxxx"}	*6789

**To indicate the masked SSN digits, type "xxx-xx-" in front of the merge field in Preview mode of the document.*

ZIP Code fields

Merge Code	Data Output
{MERGEFIELD zipcode_of_providerstreetaddresses}	66211
{MERGEFIELD zipcode_of_providerstreetaddresses \# #####-####}	66211-1000

Related topics

[Creating a user signature](#) (on page 61)

Modify merge field format

To modify the way in which a merge field is displayed in your linked Word document, complete the following steps.

Prerequisite

Microsoft Word version 2007 or later is required.

1. In **Word**, right-click on the merged field and choose **Toggle Field Codes**. Opening and closing braces surround the merge field code.
2. At the end of the merge field code, type a space and then the necessary switch. (See [Common merge field switches](#) (on page 62))

Note

The switch code must be typed in front of the closing brace.

3. To preview the new merge field format, on the **Mailings** tab, click **Preview Results**.
4. Save and close Word.
5. Close Excel, if open.

[Related topics](#)

[Common merge field switches](#) (on page 62)

[Creating a user signature](#) (on page 61)

Create an If...Then...Else... statement

If...Then...Else... statements are useful when sending documents that require different instruction, depending on a particular data element. An example of a document using an "If...Then...Else" statement would be a letter that populates a salutation of "Dear Sir" or "Dear Madam" as determined by the Gender field of the provider's record (if Gender ='F', then populate 'Madam') contained within a query's result set.

Example

An If...Then...Else... statement may be useful if you have been asked to create a board approval letter that will be sent to providers and display different text, depending on the category designation of the provider.

To create an If...Then...Else... statement, complete the following steps.

Prerequisite

- Microsoft Word version 2007 or later is required.
- In symplr Provider, ensure that the query linked to your Word document contains the fields that will produce the information needed, such as the provider's name, entity category, etc.

1. In **Word**, complete the following substeps.
 - a. Insert your cursor in the spot where your If...Then...Else... statement should appear.
 - b. On the **Mailings** tab, click the **Rules** drop-down arrow and then select the **If...Then...Else...** option.
 - c. In **Insert Word Field**, in the **Field name** list, select **CATEGORY_RTK_of_ENTITYASSOCIATIONS**.
 - d. In the **Comparison** list, select **Equal to**.
 - e. In the **Compare to** box, type **ACTIVE**.
 - f. In the **Insert this text** box, type information from the bylaws, such as "According to our bylaws, you are eligible to vote, hold office, and serve on medical staff committees."
 - g. In the **Otherwise insert this** text box, type alternate information from the bylaws, such as "According to our bylaws, though you are eligible to serve, you will not be eligible to vote or hold office on medical staff committees."
 - h. Click **OK**. To preview the statement, on the **Mailings** tab, click **Preview Results**.

Note

Multiple scenarios can be placed within one If...Then...Else... statement by "nesting." If you require assistance nesting multiple If...Then...Else... statements, please contact your symplr support team.

- i. Complete the rest of the document, inserting merge fields where necessary.
 - j. Save and close Word.
 - k. Close Excel, if open.
2. In **symplr Provider**, upload the newly Word document and save the file.
 - a. In **Document** (design mode), in the **Word Document** section, click **Upload** .
 - b. Navigate to the Word file you just created, select it, then click **Open**.
 - c. Click **Save**.

Using Microsoft Word

You can use Microsoft Word to create more complex documents.

Manage documents

You can edit documents and links, and delete or inactivate documents.

Edit a document

See [Edit an existing document](#) (on page 67)

Edit a query linked to a document

To edit a query linked to a document, complete the following steps.

Warning!

Removing fields from a query may cause any documents, reports, packets, and dashboard widgets supported by the query to malfunction.

1. Search for the document.
2. Under **Search Results**, click **Edit**  next to the document linked to the query you want to edit.
3. In **Document** (design mode), in **Query Properties**, click **Open** .
4. In **Query** (edit mode), edit the query as desired.
5. Click **Run**.
6. Click **Save** and close the Query work item.
7. Optional. If you have added new fields into the edited query that contain information you would like displayed in the linked document, see [Edit an existing document](#) (on the next page) to insert the new merge fields.

Inactivate a document

To inactivate a document, complete the following steps.

1. Search for the document.
2. Under **Search Results**, click **Edit**  next to the document you want to inactivate.
3. In **File Properties**, clear the **Active** check box.
4. Click **Save**.

Delete a document

To delete a document, complete the following steps.

Prerequisite

You must have the required [security rights](#) to perform this procedure.

Note

To maintain data integrity, sympplr recommends you inactivate a document instead of deleting it.

1. Search for the document.
2. Under **Search Results**, click **Edit**  next to the document you want to delete.
3. On the sympplr Provider toolbar, click **Delete**.

4. To confirm deletion, click **Yes**.
5. Click **Save**.

[Related Items](#)

[Manage inbox items](#) (on page 101)

[Mass edit select grids](#) (on page 123)

[Edit an existing document](#)

To edit an existing document, complete either of the following procedures.

Prerequisite

You have access to both Microsoft Excel and Word (version 2007 or later).

1. Search for the document.
2. Under **Search Results**, click **Edit**  next to the document you want to edit.
3. In **Document** (design mode), select one of the following methods.

Edit a document (excluding insertion of new merge fields)

1. In **Word Document**, click **Download** .
2. Open the document.

Note

If a "Protected View" message appears, click Enable Editing.

3. In **Word**, edit the document as desired.
4. Save and close **Word**.
5. Close **Excel**.
6. In **sympplr Provider**, in the **Word Document** section, click **Upload** .
7. Navigate to the **Word** file you just edited, select it, then click **Open**.
8. Click **Save**.

Edit a document (including insertion of new merge fields)

1. In **Query Properties**, click **Download** 
 - a. The first 10 records of your query download to your computer in an Excel spreadsheet.
2. In **Excel**, verify you are pulling the correct type of data and that you can edit the file.

- a. Open the Excel file.

Tip

If a "Protected View" message appears, click Enable Editing.

- b. If required, click **Enable Editing**.

3. In **Word**, connect the Word document to the Excel fields, and build the merge document.

- a. In **Document** (design mode), in **Word Document**, click **Download** .

- b. Open the document.

Tip

If a "Protected View" message appears, click Enable Editing.

- c. Click the **Mailings** tab.

- d. From **Select Recipients**, select **Use an Existing List**.

- e. In **Select Data Source**, select the **Downloads** folder.

- f. Select the Excel file of the query you downloaded above, then click **Open**.

If you receive an error that the external table is not in the expected format, verify that editing is enabled on the Excel file, then try again.

- g. In **Select Table**, click **OK**.

- h. Place your cursor where you want to display the new merge field information, then in the **Mailings** tab, select **Insert Merge Field**, and select the desired field.

- i. Optional. Insert additional merge fields into your document as needed.

- j. Save and close **Word**.

4. Close **Excel**.

5. In **symplr Provider**, in the **Word Document** section, click **Upload** .

6. Navigate to the **Word** file you just edited, select it, then click **Open**.

7. Click **Save**.

Note**The difference between upload/download and import/export**

In symplr Provider, when you upload or download a file, you are working with files that contain data, such as a report you have just run. When you import/export files from the toolbar using **More**, you are working with the shell or framework used to present your data.

Reports

A report contains information generated using your application data organized in a manner that can be printed, emailed externally, or sent to a distribution list containing a combination of external email addresses and internal symplr Provider users. (See [Manage distribution lists](#) (on page 100))

Depending on the security rights granted to you by the system administrator at your organization, you may either run, create, and/or edit a report.

Running a report

When you run a report, the system generates a file containing data from the query linked to the report. The application provides several reports that are already linked to queries, allowing you to quickly generate a report whenever you need it. Depending on the settings your administrator has set, you can download a hard copy of a report, or deliver it to a INCOMPLETE LIST.

A report may contain filters that you can modify before you run the report. Any modifications you make to the filters are temporary and will not be saved after you run the report.

Creating and editing a report

If you have the necessary security rights, you can create a new report and link the report to the query of your choice, or edit an existing report.

You can also define what action symplr Provider performs when a user runs a report. For example, if you select a Distribution List as the default delivery method for a report, when a user runs the report it is delivered by email to non-symplr Provider users designated as recipients within the specified Distribution List. Report recipients may be both symplr Provider users and external (non-symplr Provider) users.

Note

symplr Provider users that are a part of a Distribution List will receive the report in their Inbox and not as an email.

Report tracking

When you enable tracking for a report, each time the report is run, symplr Provider creates a tracking record for every provider listed in the report. The tracking record provides a description of the report, the report type, the symplr Provider user who sent the report, the date it was sent, and the entity from which the report was sent, if applicable. You can view tracking information in the Tracking History form.

Run a report

Several methods are available for running a document. To run a document, complete any of the following procedures.

1. Select one of the following methods to select a document to run. (Other methods coming soon!)

Run a report from the Global Search box

- a. In Global search, search for a report.
- b. In the **Search Results**, select the report.

Run a report from the Home hub

- a. In the **Home** hub, click **Run** .
 - b. On the **Reports** tab, select a report, then click **OK**.
2. In the **Report** form, on the **Run** tab, perform the following actions.
 - a. In the **Review filters** section, review and edit filters as needed.
 - b. Optional. To send the report to both your inbox and a distribution list, in the **Settings** section, complete the following substeps.
 - i. Select **Distribution List**.
 - ii. Select a distribution list, then click **OK**.
 - You can edit the distribution list by clicking **Open Distribution List** . making any changes, then clicking **Save**. You will need to reselect the newly edited distribution list.

Note

When you run a report with Distribution List checked, email recipients will receive an email with the report name in the subject line and the report as a pdf attachment. There will be not text in the body of the email.

3. Click **Run Document**.
4. When prompted to close the document, click **Yes**.

Create or edit a report

symplr Provider gives you several options for creating and accessing report.

1. Open an existing or new report using one of the following methods.
 - Each of these methods opens the report as an additional work item.

Create a new report

Situation	Steps
A query	<ol style="list-style-type: none"> 1. Open and run a query. 2. On the Results tab, click New, then Report.
Global search	<ol style="list-style-type: none"> 1. Search for a report. 2. Under Search Results, click New Report.
Home hub	<ol style="list-style-type: none"> 1. In the Home hub, click Create New, then select Report.

Open an existing report

Situation	Steps
A query	<ol style="list-style-type: none"> 1. Open a query. 2. On the Linked Items tab, next to the report to edit, click Open .
Global search	<ol style="list-style-type: none"> 1. Search for a report. 2. Under Search Results, next to the report to edit, click Open .
Home hub	<ol style="list-style-type: none"> 1. In the Home hub, click Run , then select Reports. 2. Find and select a report, then click OK. 3. Switch to the Design tab.

2. In the **File Properties** section, type a **Description** for your report.
 - The description is mandatory, and will serve as your report name.
 - The other fields in this section are optional.

3. In the **Query Properties** section, complete the following substeps.
 - a. If the Query field is blank, click **Search**  , then find and select a query to define your report results.
 - Optional. To open the query for editing as a separate work item, next to the query name, click Open  .
 - b. Optional. Select the **Format Results using Advanced Mail Merge Format** to alter the default behavior of data merged into the report.
If **Format Results using Advanced Mail Merge Format** is selected, multiple license or education record types can be displayed in one report as opposed to one report per record.
 - c. Optional. If using a flat file to pull data for your query, select a flat file from **Flat File**.
4. in the **Report** section, you can import and export reports.
 - a. See [Import and export reports](#) (below)
5. To enable report tracking, in the **Settings** section, check **Tracking History**, then select a **Type** to describe the report.

Distribution List is used to send a report to a distribution list. See [Run a report](#) (on page 70)
6. Click **Save**.

Import and export reports

To import or export a report to symplr Provider, complete the following steps.

1. Open a report, select the **Design** tab.
2. In the **Report** section, select the desired action.

Import a report

- a. Click **Upload a Report** , navigate to the desired report, then click **Open**.
 - i. The Type and Name fields will populate with report information.
- b. Click **Save**.

Export a report

- a. Click **Download this Report** .
- b. Click on the link at the bottom of your browser to open the report, or navigate to your downloads folder.

The difference between upload/download and import/export

In symplr Provider, when you upload or download a file, you are working with files that contain data, such as a report you have just run. When you import/export files from the toolbar using **More**, you are working with the shell or framework used to present your data.

Manage Reports

You can edit, import/export, inactivate, and delete reports. You can also edit a query that is linked to a report.

Edit a report

See [Create or edit a report](#) (on page 71).

Export/Import a report

See [Create or edit a report](#) (on page 71).

Inactivate a report

To inactivate a report, complete the following steps.

1. Search for the report.
2. Under **Search Results**, click **Edit**  next to the report you want to inactivate.
3. In the **File Properties** section, deselect **Active**.
4. Click **Save**.

Delete a report

To delete a report, complete the following steps.

Prerequisite

You must have the required security rights to perform this procedure.

Note

To maintain data integrity, symplr recommends you inactivate a report instead of deleting it.

1. Search for the report.
2. Under **Search Results**, click **Edit**  next to the report you want to inactivate.
3. On the [Toolbar](#) (on page 19), click **Delete**.
4. To confirm deletion, click **Yes**.
5. Click **Save**.

Edit a query linked to a report

To edit a query linked to a report, complete the following steps.

Note

Removing fields from a query may cause any reports, documents, packets, and dashboard widgets supported by the query to malfunction.

1. Search for the report.
2. Under **Search Results**, click **Edit**  next to the report you want to edit.
3. In the the **Query Properties** section, click **Open** .
 - The query opens as a separate work item.
4. In the **Query** form, edit the query as desired. (See [Edit a query](#) (on page 33))
5. Click **Save**.

Flat files

A flat file can be used to meet several types of reporting requirements such as when you are required to deliver provider information in a specific format and when you need an accurate row count with no provider duplicates. Flat files are generated in either comma delimited files (.txt) or comma-separated value files (.csv).

Flat files can be generated from a query, the Providers form, or from the Credentialing Manager using the Send To feature and a flat file template. Flat files are delivered to your symplr Provider inbox. You can also link flat files to symplr Provider documents and reports.

Depending on the security rights granted to you by the system administrator at your organization, you may generate a flat file, edit a flat file, or both.

Flat File Manager

You use the Flat File Manager to create and manage the templates used to generate flat files. When you build a template, you select the fields and define filters you want to include in your flat file. The detail view of the form is divided into three sections, as described in the following table.

Section	Description
Flat File Setup	This section displays the template name, description, and the type of output created when the query is exported. A comma separated value (CSV) file is the most common export format used. You can also create a comma delimited file.
File Tree	Similar to Windows Explorer, the file tree displays all forms and sections containing fields available for use in flat files. As fields are added to the flat file, the corresponding folder names appear in bold and include a number representing the number of fields added to the flat file.

Section	Description
Grid	This section allows you to view the selected fields and to select the number of records allowed for display in the flat file, such as, the number of specialty records displayed per provider.

Linking flat files to reports and documents

When designing reports and documents, you have the option to add a flat file in the query properties. When you include a flat file, the query underlying the document or report is only used to pull providers and the flat file pulls the data fields.

Once you run the report or document, it is delivered to the inbox, where you can download it. The download will differ based on the flat file format you chose when creating your flat file.

CSV - A copy of the completed report/document is attached.

TXT - Both the completed report/document and the flat file are included as separate attachments.

Create a flat file template

To export data to a flat file, you use a flat file template. To create a flat file template, complete the following steps.

You must have the required [security rights](#) to view and use the **Flat File Manager** form.

1. Open the **Flat File Manager** form.
2. Click **New**, then toggle to Detail View.
3. In the **Flat File Setup** section, enter a **Description** and **File Name**.
4. Optional. In **Output Type**, select the file type for your generated flat file.
 - The system defaults to the most common file type, comma separated value (CSV).
5. To add fields to the flat file template, complete the following substeps.
 - a. In the file tree, select the form or section where the field is stored.
 - b. In the grid, click **Add Row** (+).
 - c. In **Add Fields**, select one or more fields to include in the flat file, then click **OK**.
 - Alternatively, you can filter for a subset of records, or click **Select All**.
 - d. Repeat the previous substeps for each field you want to add.
 - As fields are added to the flat file template, they are displayed in the grid.

The fields displayed in the grid are dependent upon the form/filter selected in the file tree. For example, if the **Providers** form is selected in the file tree, the fields added to the flat file template that originate from the **Providers** form will be displayed.

6. Optional. To view all fields added to the flat file template, in the file tree, select **Filters**.

7. Optional. [Update flat file field sort order](#) (below).
8. Click **Save**.

Update flat file field sort order

To update the order in which your flat file fields appear, complete the following steps.

1. Open the **Flat File Manager** form, select a file, then switch to detail view.
2. Click **Sort order**.
3. In **Update Sort Order**, complete any of the following actions.
 - To sort the fields alphabetically by name, click **Sort by Alpha**  .
 - To move a field, select it, then click any of the directional arrows, or drag and drop it to the desired location.
 - To move one or more fields to the top of the list, highlight your selections, then click .
 - To move one or more fields to the bottom of the list, highlight your selections, then click .
4. Click **OK**.
5. Click **Save**.

Generate a flat file

You generate a flat file by sending data to a Flat File Manager template from query results, the Providers form, or from the Credentialing Manager. The resulting flat file is sent to your symplr Provider inbox where you can download the file.

The flat file will be delivered to your symplr Provider inbox.

The flat file template must be created prior to completing this procedure. See [Create a flat file template](#) (on the previous page) for more information.

To generate the flat file, complete the following steps, depending on the situation.

Situation	Steps
From Query Results	<ol style="list-style-type: none"> 1. Generate query results that contain the providers or institutions you want to send to the flat file. 2. On the Results tab, click Send To . 3. Select Providers, then click Next. 4. Select Flat File Manager, then click Next. 5. Select the flat file template from the list, then click OK.
From the Providers form	<ol style="list-style-type: none"> 1. Open the Providers form for the provider or institution you want to send to the flat file. 2. Click Send To . 3. Select Flat File Manager, then click Next. 4. Select the flat file template from the list, then click OK.
From the Credentialing Manager form	<ol style="list-style-type: none"> 1. Open the Credentialing Manager form. (See Manage multi-credentialing instances (on page 164)) 2. In List View, select one or more records to include using one of the available methods. (See Mass updates and mass actions (on page 103)) 3. Click Send To . 4. Select Flat File Manager, then click Next. 5. Select the flat file template from the list, then click OK.

Manage flat file templates

In addition to editing text fields, changing output types, and managing the grid items, you can update field sort order, and copy and delete templates.

Update field sort order

See [Update flat file field sort order](#) (on the previous page)

Copy a template

If you want to build a template from an existing template, complete the following steps.

1. Open the **Flat File Manager** form.
2. In detail view, click **Copy File**.
3. In **Copy File**, change the **Description** and **File Name** as needed, then click **OK**.

4. Edit the new file as needed.
5. Click **Save**.

Delete a template

To delete a flat file template, complete the following steps.

You must have the required security rights to perform this procedure.

1. Open the **Flat File Manager** form.
2. Select a row in the grid to delete.
3. Click **Delete**.
4. To confirm deletion, click **Yes**.
5. Click **Save**.

Profiles

The term "profile" is used to describe provider summary reports and applications (state, federal, or payor) that have been programmed to auto-populate with symplr Provider data when run. The user can choose the provider data to display in the profile by adjusting the profile settings.

Depending on the [security rights](#) granted to you by the system administrator at your organization, you may run or edit a profile, or both.

Running a profile

When you run a profile, the results are sent to the inbox. You can run a profile using Send To functionality in a query or on select forms that include the blue key. (See [Use the Send To feature](#) (on page 103))

Note

Only providers with EA (Entity Associate) records are included when you run a profile.

Editing a profile

If you have the necessary security rights, you can create a new symplr Provider profile, or edit the settings of an existing one. You can also define what action symplr Provider performs when a user runs a profile.

Note

Your user profile (accessed through your user name on the title bar) is unrelated of the data profiles outlined above.

Run a profile

When you run [Profiles](#) (on the previous page), symplr Provider retrieves the provider's data and displays it in a report. There are several methods for running a profile. To run a profile, complete any of the following procedures.

Run a profile from global search, or the Home hub

1. Select one of the following methods to select the profile to run.
 - **Run from Global Search**
 - a. Search for and select a provider profile.
 - **Run from the Home hub**
 - a. In the **Home** hub, click **Run** .
 - b. In **Select Providers**, search for and select one or more providers, then click **OK**.
2. In the **Run** tab **Providers** section, click **Add** .
3. In **Select Providers**, search for and select one or more providers, then click **OK**.
4. Click **Run Profile**, then click **Yes** to close the profile.

Run a profile from a query

If a profile has been related to a query, you can run a provider or group profile directly from the query. You must run the query before you can generate a profile.

1. [Run a query](#) (on page 30).
2. On the **Results** tab, click **Send To**, then select either **Providers** or **Groups**, then click **Next**.
3. In **Send to**, select **Profiles**, then click **Next**.
4. In **Send to**, select the profile to send to, then click **OK**.
5. In **Generate Profile**, select **Yes** to generate the profile for all of the providers listed, or **No** to generate the profile for the provider currently in focus (highlighted) in your query results.
 - The profile is sent to the **Inbox** hub and appears on the **Completed** tab once symplr Provider has finished generating it.

Run a profile from the Providers or Group Practices form

You can run a profile from either the Providers or Group Practices form using Send to.

1. Open either form to the desired provider or group.
2. In the open form, click **Send to** .

3. In **Send to**, select **Profiles**, then click **Next**.
4. In **Send to**, select the profile to send to, then click **OK**.
5. In **Print Profile**, select **Yes** to print the profile for all of the providers listed, or **No** to run the profile for the provider currently in focus (highlighted) in your query results.
 - The profile is sent to the **Inbox** hub and appears on the **Completed** tab once symplr Provider has finished generating it.

Tip
You will be notified when the profile is done processing and delivered to your Inbox.

Create a profile

To create a profile, complete the following steps.

1. Open the **Profile Setup** form using one of the following methods.

Situation	Steps
Home hub	<ol style="list-style-type: none"> 1. In the Home hub, click Create New . 2. Select Profile.
Global Search	<ol style="list-style-type: none"> 1. Search for a provider profile. 2. Click + New Profile.

2. To define the profile's properties, in the **File Properties** section, complete the following substeps.
 - a. In **Description**, type a unique description of the profile.
 - b. Optional. In **Category**, select a category that best describes the profile.
 - c. Optional. To provide a description of the profile, click **Description Details** , type a brief summary of the profile, then click **OK**.
3. To attach the profile, in the **Profile Properties** section, complete the following substeps.
 - a. If the **Profile** drop-down list is blank, select the profile.
 - b. Click **Profile Options** , then complete the **Setup Profile** stepper to build and configure the profile.

Tip
See [Steppers](#) (on page 118) if you need help navigating the stepper. Note that some steps are optional in Set Up Profile stepper.

4. Click **Save**.

Manage profiles

You can edit, inactivate and delete [Profiles](#) (on page 78).

Prerequisite

You must have the required [security rights](#) to perform these procedures.

Edit an existing profile

To edit an existing profile, complete the following steps.

1. Search for the provider profile.
2. In the **Search Results**, click **Edit**  next to the profile to alter.
3. In the **Profile Setup** form, complete the following substeps.
 - a. To edit the profile's description, category, or description details, in the **File Properties** section and apply your changes.
 - b. To attach a different profile, in the **Profile Properties** section, in **Profile**, select a profile.
 - c. To change the profile properties, select **Profile Options** , then edit the **Setup Profile** stepper as needed.
 - d. To change the default delivery settings, in the **Delivery Settings** section, apply your changes.
4. Click **Save**.

Inactivate a profile

To inactivate a profile, complete the following steps.

1. Search for the provider profile.
2. In the **Search Results**, click **Edit**  next to the profile to inactivate.
3. In the **Profile Setup** form, in the **File Properties** section, deselect **Active**.
4. Click **Save**.

Delete a profile

To delete a profile, complete the following steps.

Note

To maintain data integrity, symplr recommends you inactivate a profile instead of deleting it.

1. Search for the provider profile.
2. In the **Search Results**, click **Edit**  next to the profile to delete.
3. On the toolbar, click **Delete**.
4. To confirm deletion, click **Yes**.
5. Click **Save**.

Managing affiliated items

Affiliated items are attached to a work item. These include Attachments and Tasks, which are all available from the toolbar when you have an open work item. Affiliated items open in a separate window or tray at the bottom of your active task.

Tasks are also available in the Tasks hub.

Note

When you delete a record that has an affiliated item attached the system informs you that attachments will be deleted, but tasks will be retained.

Tasks

A task is an activity to be completed within a defined period of time or by a deadline related to a record in the application. You can assign tasks to other users, or complete tasks assigned to you, and set reminders to let you know when a task needs your attention.

Tasks can be created within a form or from the Tasks hub. The Tasks hub allows you to view and manage all of your tasks in the application in a single location.

The Tasks icon on the toolbar allows opens the Tasks tray where you can view tasks for the current record, or all records for the same type for the provider.

Task viewer

The task viewer is the form that appears at the bottom of an open form or record after clicking **Tasks** in the toolbar. The task viewer provides a list or task detail view of all tasks associated to a particular form and/or provider. You can also create a new task, or edit an existing task, directly from the task viewer.

Tip

You can filter the task viewer grid by any of the available columns. For instance you can filter by the Assigned To column to see tasks assigned to a specific person.

View a task in the task hub

Cactus offers two methods for viewing a task from the task hub. You can view tasks assigned to you and tasks that you have assigned to others.

Complete the following steps to view a task in the task hub.

1. Select the appropriate section and grid to view the tasks.
 - Tasks assigned to me - include tasks that either you or others assigned to you.
 - Tasks I've assigned to others - include tasks that you assigned to others.
2. Optional. To view tasks completed in the last 30, 60, 90, or 120 days, check **Include tasks completed during the previous ...**, then select the desired time period.
3. Optional. To view task properties, select the task, then click **Expand Properties** 
 - The properties of the task appear directly below the task list.
4. Optional. To view additional details about the task, click **Open** .

Create a task

Tasks can be created from the task hub or from within a form.

Create a task from the task hub

To create a task from the **Tasks** hub, complete the following steps.

Note

Tasks created directly from the **Tasks** hub cannot be linked to any records or forms.

1. Open the **Tasks** hub.
2. To the right of the **Tasks** heading, click **Add a New Task** .
3. Optional. To assign the task to another user, select a name from **Assigned To**.
 - You can also search for and select a name.
4. In **Subject**, type the subject of the task.
5. Optional. In **Priority**, select the priority level of the task.
6. Optional. In the **Due** date and time boxes, enter the date and time when the task should be completed.
7. Optional. To set a reminder to appear at a designated date and time for the task owner, select **Reminder**, then enter the date and time below the check box.
8. Optional. In **Details**, type any additional information.
9. Click **Save**.

Create a task from a form

When you create a task from a form, the task and form are automatically linked. To create a task from a form, complete the following steps.

Tip

New records must be saved before you can attach a task.

1. Open a form using your preferred method.
2. On the **Toolbar** (on page 19), click **Tasks**.
3. In **Tasks**, click **+**.
4. Enter any of the following optional information.
 - To assign the task to another user in **Assigned To**, select a different user.
 - In **Subject**, type a new subject as needed.
 - In **Priority**, select the priority level of the task.
 - In **Due** and **At**, enter the date and time when the task should be completed.
 - To set a reminder to appear at a designated date and time for the task owner, select **Reminder**, then enter the date and time in the accompanying boxes.
 - In **Details**, type any additional information.
5. Click **OK**.
6. Click **Save**.

Edit a task

Tasks can be created from the task hub or from within a form.

Edit a task from the Tasks hub

1. Open the **Tasks** hub.
2. Click **Edit**  accompanying any task listing on the hub.
3. In the **Task Detail** form, make your edits to the task record.
4. Click **Save**.

Edit a task from a form

A task may be edited from the form to which it is linked. To edit a task from the linked form, complete the following steps.

1. Open the form.
2. On the **Toolbar** (on page 19), click **Tasks**. The Tasks viewer opens.
3. In the Tasks viewer, click **Edit** .
4. In the **Edit Task** form, make your edits to the task record.
5. Click **Save**.

Forward a task

symplr Provider offers two methods for forwarding (or reassigning) a task to another user. To forward a task, complete one of the following procedures.

Forward a task from the Tasks hub

A task may be forwarded to another owner from the [Hubs](#) (on page 18). To forward a task from the **Tasks** hub, complete the following steps.

1. Open the **Tasks** hub.
2. Click **Edit**  accompanying any task listing on the hub.
3. In the **Task Detail** form, click **Forward** .
4. In **Forward Task**, select the user the task is to be forwarded to, then click **OK**.

Forward a task from a form

A task may be forwarded to another owner from the form to which it is linked. To forward a task from the linked form, complete the following steps.

1. Open the form.
2. On the [Toolbar](#) (on page 19), click **Tasks**. The task viewer opens.
3. In the Tasks viewer, click **Edit** .
4. In the **Edit Task** form, in the **Assigned To** list, select the user the task is to be forwarded to, then click **Save**.

Complete a task

symplr Provider offers two methods for completing a task. To complete a task, complete one of the following procedures.

Complete a task from the Tasks hub

A task may be completed from the [Hubs](#) (on page 18). To complete a task from the **Tasks** hub, complete the following steps.

1. Open the **Tasks** hub.
2. Click **Edit**  accompanying any task listing on the hub.
3. In the **Task Detail** form, click the **Completed** button.
4. Click **Save**.

Complete a task from a form

A task may be edited from the form to which it is linked. To edit a task from the linked form, complete the following steps.

1. Open the form.
2. On the **Toolbar** (on page 19), click the **Tasks** button. The task viewer opens.
3. In the task viewer, double-click on the listed task you want to complete. Some of the task details open in the task viewer.
4. Click the **Completed** check box.
5. Click **Save**.

Delete a task

To delete a task, complete the following steps.

Note

Attempting to delete a task from the task viewer of an open record will initiate the deletion of the record and not the linked task.

1. Open the **Tasks** hub.
2. Click **Open**  next to the task you want to delete.
3. On the symplr Provider toolbar, click **Delete**.
4. To confirm deletion, click **Yes**.
5. Click **Save**.

Attachments

symplr Provider offers several options for managing your attachments.

Note

You must have the proper [security rights](#) to use the attachment and verification attachment management features.

Attachment Manager

The Attachment Manager allows you to manage the entire collection of attachments associated to all of a provider's records. The left pane supplies a tree or hierarchical view; you can toggle the right pane between list and gallery view. Some of the actions you can perform in the attachment manager are:

- **Add an attachment** (on page 89) directly into symplr Provider
- find attachments in tree view, then view or move in list view, or view thumbnails and file detail in gallery view

- manage attachments (add, remove, move to another record, and edit detail)
- view and manage images and image fields in a separate browser tab, or gallery view

After the attachments have been added, you can associate them with a provider record. You can also query and report on attachment information, and through queries, can include attachments in documents, reports, and profiles.

When you add an attachment to the Attachment Manager, it is saved automatically.

Verification Attachment Manager

The Verification Attachment Manager, available through the Credentialing / Verification form (Verifications > Attachments) allows you to add attachments to the verification of a credentialing instance. The Verification Attachment Manager offers the same functionality as the Attachment Manager.

Attachment viewer

The attachment viewer is the tray that appears at the bottom of an open form or record after clicking Attachments on the toolbar. Here you can work with attachments related to the current form or associated provider. Some of the actions you can perform are:

- view an images in separate window
- manage attachments (add, remove, inactivate, publish, edit detail)
- download an attachment to your local computer

Note

- You can only have one attachment manager type open at a time for a given provider.
- When you add an attachment, it is auto-saved. When you delete or edit attachments, you must save the changes.
- Credentialing records associated with unlocked credentialing groups will not display in the Verification Attachment Manager tree view.

Related topics

[Attachment file types](#) (on the next page)

Attachment file types

You can attach many different file types, including various image types, multiple text formats, as well as .xml and .html files.

Image Files

File Type	Description
.bmp	A bitmap (.bmp) is a digital image composed of a matrix of dots. This simple, universal image format can be recognized on nearly all platforms, but is not very efficient, especially for large images.
.gif	Unlike the JPEG image format, GIFs use lossless compression that does not degrade the quality of the image. However, GIFs store image data using indexed color, meaning each image can include a maximum of 256 colors.
.jpeg/.jpg	A JPEG is a compressed image file format that is not limited to a certain amount of color, like GIF images are. While JPEG images can contain colorful, high-resolution image data, it is a lossy format, which means some quality is lost when the image is compressed.
.pdf	A PDF file captures document text, fonts, images, and even formatting of document from a variety of applications. Since PDFs contain color-accurate information, they should also print the same way they look on your screen.
.png	A PNG includes many of the benefits of both GIF and JPEG formats. For example, PNG images use lossless compression like GIF files, so they do not have any blurring or other artifacts that may appear in JPEG images. The PNG format also supports 24-bit color like the JPEG format, so a PNG image may include over 16 million colors.
.tif/.tiff	A TIFF is a graphics file format and is the standard image format across multiple computer platforms. The TIFF format can handle color depths ranging from 1-bit to 24-bit.

Note
Upon import into symplr Provider, TIFF images can be converted to a PDF.

File type definitions obtained from the [Tech Terms Computer Dictionary](#).

Other file types

File Type	Description
.csv	A CSV file is a comma separated values file commonly used by spreadsheet programs such as Microsoft Excel or OpenOffice Calc. It contains plain text data sets separated by commas with each new line in the CSV file representing a new database row and each database row consisting of one or more fields separated by a comma. CSV files are often opened by spreadsheet programs to be organized into cells or used for transferring data between databases.
.doc/.docx	A DOCX file is a document created by Microsoft Word or another word processing program, such as OpenOffice Writer or Apple Pages. It contains formatted text but may also include images, tables, charts, and other document elements. DOCX files are widely used in home, academic, and business environments for letters, resumes, invitations, newsletters, and other documents.
.htm/.html	Most web pages are written in HTML. Web pages must conform to the rules of HTML in order to be displayed correctly in a web browser. The HTML syntax is based on a list of tags that describe the page's format and what is displayed on the web page.
.msg	An MSG file is an email message, contact, appointment, or task created or saved within Microsoft Outlook. It may contain one or more email fields, which includes the date, sender, recipient, subject, and message body, or contact information, appointment details, and one or more task descriptions. MSG files are also compatible with other programs that use Microsoft's Messaging Applications Programming Interface (MAPI).
.txt	A TXT file is a standard text document that contains unformatted text. It is recognized by any text editing or word processing program and can also be processed by most other software programs.
.xls/.xlsx	An XLS file is a spreadsheet file created by Microsoft Excel or another spreadsheet program, such as OpenOffice Calc or Apple Numbers. It contains one or more worksheets, which store and display data in a table format. XLS files may also store mathematical functions, charts, styles, and formatting. With Excel 2007, Microsoft introduced the Microsoft Excel Open XML Spreadsheet format and replaced XLS files with .XLSX files as the standard file for saving spreadsheets in Excel.

File type definitions obtained from the [Tech Terms Computer Dictionary](#).

Add an attachment

You can add files up to 12 MB in size (or multiple files at one time up to 30 MB) to provider records, credentialing instances, and verification instances. You can also manage the file's details. To add an attachment to symplr Provider, complete the following steps.

Tip

Be sure to close the files to attach before completing these steps.

1. Add an attachment using one of the methods listed in the table.

Situation	Steps
From a form	<ol style="list-style-type: none"> 1. Open the form and navigate to the specific record to which the file will be associated. <div data-bbox="639 548 1463 642" style="border: 1px solid purple; border-radius: 10px; padding: 5px; margin: 10px 0;"> <p>Tip Save newly created files before adding attachments.</p> </div> <ol style="list-style-type: none"> 2. On the toolbar, click Attachments. 3. In the attachment viewer, click Add (+). 4. In Open, navigate to and select the file to attach, then click Open. Alternatively, you can drag-and-drop your file from Windows into the right pane.
From the Credentialing Manager or Credentialing / Verification form	<ol style="list-style-type: none"> 1. Open the appropriate credentialing form, then select a provider. 2. Select an record and switch to Detail view. 3. On the Verifications tab, click Attachments. 4. In the left column (tree view), select the record containing the attachment. <ol style="list-style-type: none"> a. Records with attachments are shown in bold with the number of attachments. 5. In the right column, click Add (+). 6. In Open, navigate to and select the file to attach, then click Open. Alternatively, you can drag-and-drop your file from Windows into the right pane.
From the Attachment Manager form	<ol style="list-style-type: none"> 1. Open the Attachment Manager form, then select a provider. 2. In the left column (tree view), select the form to which the attachment will be associated. 3. In the right column, click Add (+). 4. In Open, navigate to and select the file to attach, then click Open. Alternatively, you can drag-and-drop your file from Windows into the right pane.
From Windows Explorer (drag-and-drop, multiple files)	See Add attachments from Windows Explorer (on the next page)

2. Update file details in the grid as needed. (See [Manage attachments](#) (on page 94))

Add attachments from Windows Explorer

Files can be added directly into symplr Provider via Windows Explorer.

Tip

You can also drag-and-drop email messages and email attachments directly into either the Attachment Manger or the Attachment tray.

To drag and drop files from Windows Explorer, complete the following steps.

1. Open Windows Explorer to the location containing the files to add.
2. Complete one of the following procedures, depending on the situation.

Target location	Steps
A specific form	<ol style="list-style-type: none"> 1. Open the form and navigate to the specific record to which the attachment will be associated. 2. On the toolbar, click Attachments. 3. Click and drag one or more files from Windows Explorer into the thumbnail pane of the attachment viewer. <div style="border: 1px solid purple; border-radius: 10px; padding: 5px; margin-top: 10px;"> <p>Tip Drop the file when you see "Drop Attachments Here" appear.</p> </div>
Attachment Manager form	<ol style="list-style-type: none"> 1. Open the Attachment Manager form, then select a provider. 2. In the left column (tree view), select the specific record to which the image will be associated. 3. Click and drag one or more files from Windows Explorer into the right (thumbnail) pane of the Attachment Manager form.
From the Credentialing Manager or Credentialing / Verification form	<ol style="list-style-type: none"> 1. Open the appropriate credentialing form, then select a provider. 2. Select an record and switch to Detail view. 3. On the Verifications tab, click Attachments. 4. In the left column (tree view), select the specific record to which the image will be associated. 5. Click and drag one or more files from Windows Explorer into the right (thumbnail) pane of the Attachment Manager form.

3. To update attachment details, click the three-dot menu , then enter any desired changes.

Add an attachment to a query

To add an attachment to a query, complete the following steps.

1. Search for and open a query.
2. To add an attachment to a query through the Paint method, complete the following substeps.

- a. On the **Query Setup** tab, select **Paint Mode**.
 - A green dot ● appears next to the query work item, indicating you are adding fields to the query using the paint method.
 - b. Open the **Attachment Manager**.
 - c. In grid view, paint the column header for the column containing image thumbnails.
 - The attachment entry is automatically added to the query's Results Setup grid.
3. Click **Save**.

View an attachment

In the Attachment Manager, you can view all attachments, or a subset of attachments. To open and view an attachment, complete the following steps.

Tip

- The available subset selections will vary depending on where you are in the system.
- Records with attachments are shown in bold with the number of attachments.

1. Complete one of the following procedures, depending on the situation.

Situation	Steps
From a form	<ol style="list-style-type: none"> 1. Open the form and navigate to the record containing the attachment. 2. On the symplr Provider toolbar, click Attachments. 3. In the Attachments tray from the Attachments list, select which records to view (all or current). 4. Optional image view. To open an attached image in a new web browser tab, double-click on the image to view.
From the Attachment Manager form	<ol style="list-style-type: none"> 1. Open the Attachment Manager form, then select a provider. 2. In the left column (tree view), select the record containing the attachment. 3. Optional. Select List View  or Gallery View  to view attachments. 4. Optional. To view a subset of records, click Show then select one of the following: All, Active, or Inactive. 5. Optional image view. To open an attached image in a new web browser tab, double-click on the image to view.
From the Credentialing Manager or Credentialing / Verification form	<ol style="list-style-type: none"> 1. Open the appropriate credentialing form, then select a provider. 2. Select an record and switch to Detail view. 3. On the Verifications tab, click Attachments. 4. In the left column (tree view), select the record containing the attachment. 5. Optional. Double-click the attachment to open it in a new web browser tab. <div data-bbox="574 1745 1463 1843" style="border: 1px solid purple; border-radius: 15px; padding: 5px; margin-top: 10px;"> <p>Tip You may need to refresh the screen to view the attachment.</p> </div>

Manage attachments

symplr Provider gives you the flexibility to download attachments, move them to different forms, publish them to the web for use with the optional modules, or inactivate and delete them.

Tip

In tree view, the records with attachments are shown in bold with the number of attachments.

Download an attachment

You can download attachments from the attachment viewer to your local computer.

Tip

Downloaded files will appear in your computer's default download location, such as the Downloads folder.

Complete the following steps to download an attachment.

1. [View an attachment](#) (on the previous page) using the method of your choice.
2. In the attachment viewer or attachment tray, click .
3. In the bottom left of your screen, click the file link to open the downloaded file..
4. To see a list of several downloaded items, click **Show All**. Alternatively, you can open your Windows download folder.

Move an attachment

You can move an attachment from one record to another.

1. Open the **Attachment Manager** form, then select a provider.
2. Find and select the attachment to move.
3. In the detail pane, click **List View** .
4. Next to the attachment to move, click the double arrows .
5. In **Move Attachments**, find and select the destination record.
 - The OK button remains inactive until you select a suitable destination record.
6. Click **OK**.

Publish an attachment on the web for optional modules

1. [View an attachment](#) (on page 93) using the method of your choice.
2. Complete the following steps based on where you are viewing the attachment.
 - From the **Attachment Manager**
 - a. Navigate to the attachment to update in the left pane, then in the right pane switch to **Gallery View** .
 - b. Click the 3-dot menu  on the attachment, then select Publish on Web
 - From **Attachments** (on the toolbar), in the attachment to update, click the Publish cell twice, then select the resulting check box.

Inactivate an attachment

You can inactivate an attachment when it is no longer applicable.

1. Complete one of the following procedures, depending on the situation.

Situation	Steps
From a form	<ol style="list-style-type: none"> 1. Open the form and navigate to the record containing the attachment to deactivate. 2. On the symplr Provider toolbar, click Attachments. 3. In the attachment viewer, select the attachment and clear the Active check box.
From the Attachment Manager form	<ol style="list-style-type: none"> 1. Open the Attachment Manager form, then select a provider. 2. In the left column (tree view), select the record containing the attachment. 3. In the right pane, select Gallery View . 4. On the attachment to deactivate, click the 3-dot menu , then deselect Active.
From the Credentialing Manager or Credentialing / Verification form	<ol style="list-style-type: none"> 1. Open the appropriate credentialing form, then select a provider. 2. Select an record and switch to Detail view. 3. On the Verifications tab, click Attachments. 4. In the right pane, select Gallery View . 5. On the attachment to deactivate, click the 3-dot menu , then deselect Active.

2. Click **Save**.

Remove an attachment

You can remove an attachment from a provider record when it is no longer applicable.

Note

To maintain data integrity, symplr recommends you [Inactivate an attachment](#) (on page 98) instead of deleting it.

1. To remove an attachment, complete one of the following procedures, depending on the situation.

Situation	Steps
From a form	<ol style="list-style-type: none"> 1. Open the form and navigate to the record containing the attachment to remove. 2. On the toolbar, click Attachments. 3. In the attachment viewer, select the attachment to be removed, then click Remove .
From the Attachment Manager form	<ol style="list-style-type: none"> 1. Open the Attachment Manager form, then select a provider. 2. In the left column (tree view), select the record containing the attachment. 3. Select the image to be removed, then click Remove .
From the Credentialing Manager or Credentialing / Verification form	<ol style="list-style-type: none"> 1. Open the appropriate credentialing form, then select a provider. 2. Select an record and switch to Detail view. 3. On the Verifications tab, click Attachments. 4. In the left column (tree view), select the record containing the attachment. 5. Select the image to be removed, then click Remove .

Inactivate an attachment

You can inactivate an attachment when it is no longer applicable.

1. Complete one of the following procedures, depending on the situation.

Situation	Steps
From a form	<ol style="list-style-type: none"> 1. Open the form and navigate to the record containing the attachment to inactivate. 2. On the symplr Provider toolbar, click Attachments. 3. In the attachment viewer, select the attachment and clear the Active check box.
From the Attachment Manager form	<ol style="list-style-type: none"> 1. Open the Attachment Manager form, then select a provider. 2. In the left column (tree view), select the record containing the attachment. <ol style="list-style-type: none"> a. Records with attachments are shown in bold with the number of attachments. 3. Select the image and switch to List View  . 4. Click on the 3-dot menu  , then uncheck Active.
From the Credentialing Manager or Credentialing / Verification form	<ol style="list-style-type: none"> 1. Open the appropriate credentialing form, then select a provider. 2. Select a record and switch to Detail view. 3. On the Verifications tab, click Attachments. 4. In the left column (tree view), select the record containing the attachment. <ol style="list-style-type: none"> a. Records with attachments are shown in bold with the number of attachments. 5. Select the image and switch to List View  . 6. Click on the 3-dot menu  , then uncheck Active.

2. Click **Save**.

Remove an attachment

You can remove an attachment from a provider record when it is no longer applicable.

1. To remove an attachment, complete one of the following procedures, depending on the situation.

Situation	Steps
From a form	<ol style="list-style-type: none"> 1. Open the form and navigate to the record containing the attachment to remove. 2. On the toolbar, click Attachments. 3. In the attachment viewer, select the attachment to be removed, then click Remove .
From the Attachment Manager form	<ol style="list-style-type: none"> 1. Open the Attachment Manager form, then select a provider. 2. In the left column (tree view), select the record containing the attachment. <ol style="list-style-type: none"> a. Records with attachments are shown in bold with the number of attachments. 3. Select the image to be removed, then click Remove .
From the Credentialing Manager or Credentialing / Verification form	<ol style="list-style-type: none"> 1. Open the appropriate credentialing form, then select a provider. 2. Select an record and switch to Detail view. 3. On the Verifications tab, click Attachments. 4. In the left column (tree view), select the record containing the attachment. <ol style="list-style-type: none"> a. Records with attachments are shown in bold with the number of attachments. 5. Select the image to be removed, then click Remove .

Managing Integrated items

The items in this category allow you to perform actions on multiple work items, such as emailing documents and reports, or sending a provider or institution to a another form.

Distribution Lists

A Distribution List is a collection of recipients and is created within the Distribution List Manager form in symplr Provider. When run, symplr Provider reports may be sent to both internal (symplr Provider) users and external (non-symplr Provider) users as indicated within this pre-determined list.

With the Distribution List delivery setting selected and specified prior to running the report, symplr Provider users and user groups will receive the report in their Inbox hub, while external users will receive the report by email.

Inbox

The inbox allows you to view and manage [Reports](#) (on page 69), and [Documents](#) (on page 55), and [Profiles](#) (on page 78), and that have been delivered or are waiting to be delivered. Unopened items are shown in **bold** type.

From the inbox you can download inbox items, email documents to multiple recipients, and view statistics on both completed and schedules items. If an error occurs with an inbox item, you can click the error icon in the grid to learn more.

Tip

To print an inbox item download it, then print it using your own computer print settings.

Send To feature

The "Send To" feature allows you to easily send providers or institutions to other forms as well as profiles in the application. For example, if you have created a credentialing group and need to submit the providers within that group to the NPDB, rather than add them to the NPDB Outbox one at a time, you can use the "Send To" feature on the Credentialing Group form to quickly add all of the providers within the group to the NPDB Outbox.

Mass update and mass actions

symplr Provider offers several options for updating information for multiple providers at once. You can mass update contract and credentialing records, as well as insurance and licensing information.

In addition, you can mass archive both license and NPDB records.

Manage distribution lists

You can create a distribution list and populate it with both internal and external recipients.

Create a Distribution List

To create a Distribution List, complete the following steps.

1. Open the **Distribution List Manager** form.
2. If this is the first Distribution List to be created in the symplr Provider database, click **Create a new record**. Otherwise, on the symplr Provider toolbar, click **New**.
3. In the **Distribution List Manager** form, expand the **Distribution List Setup** section.
4. In the **Description** box, type a unique description of the Distribution List.
5. Optional. [Add a user group to a Distribution List](#).
6. Optional. [Add a user to a Distribution List](#).
7. Optional. [Add an external user to a Distribution List](#).
8. Click **Save**.

Populate a distribution list

By adding a user or group to a , you can send reports to their **Inbox** hub. By adding external (non-symlr Provider) users to a , you can send the same information to their email.

Add a user

To add a symlr Provider user to a Distribution List, complete the following steps.

1. Open the **Distribution List Manager** form.
2. Expand the **Users** section, then click **Add** ⊕.
3. In **Add Users**, select one or more users, then click **OK**.
4. Click **Save**.

Add an external user

To add an external user to a Distribution List, complete the following steps.

1. Open the **Distribution List Manager**.
2. Expand the **External Users** section, then click **Add** ⊕.
3. In **Create External User**, type the name and email address of the user, then click **OK**.

Note

External user information is not stored in symlr Provider.

4. Click **Save**.

Add a user group

To add a symlr Provider user group to a Distribution List, complete the following steps.

1. Open the **Distribution List Manager** form.
2. Expand the **User Groups** section, then click **Add** ⊕.
3. In **Add User Groups**, select one or more user groups, then click **OK**.
4. Click **Save**.

Manage inbox items

To display, save, and/or distribute one or more documents, profiles, or reports from the Inbox hub, complete the following steps.

Prerequisite

To view PDFs, you must have a PDF reader installed on your local machine.

Download a completed item

1. In the **Inbox** hub, on the **Completed** tab, select a document, profile, or report, then click **Download** .

Note

The item will be downloaded and will open in your default PDF reader.

Download a completed item for one or more selected providers

1. In the **Inbox** hub, on the **Completed** tab, select a document, profile, or report, then click **Open** .
2. Select one or more items in the grid. (See [Mass edit select grids](#) (on page 123) for more information.)
3. From the **Actions** menu, select **Download**.

Note

The item will be downloaded and will open in your default PDF reader.

Email a completed item to one or more selected providers

1. In the **Inbox** hub, on the **Completed** tab, select a document, profile, or report, then click **Open** .
2. Select one or more items in the grid. (See [Mass edit select grids](#) (on page 123) for more information.)
3. From the **Actions** menu, select **Email**.
4. To send the item to all selected recipients with a valid email address, in the **Send Email** dialog, click **Send**.

Send To feature

The "Send To" feature allows you to send data to various forms. It is available by clicking the blue key  from the Results tab of any query, or from the following forms: Providers, Credentialing/Verification, Credentialing Manager, and Group Practices.

Depending on the particular form used, providers or institutions may be sent to a variety of forms, including the following:

- ABMS*
- Application Manager Processes
- CAQH Bulk Upload
- CAQH Roster Generation
- CME by Event
- Comm. & Assign.
- Committee Setup
- Contract Manager
- Credentialing Group
- Credentialing Manager
- Exclusion
 - Screening
- Flat File Manager
- Form Builder
- Group Practices
- Mass Update - Insurance
- Mass Update - Licenses
- NPDB
- NPDB Subject Database*
- OIG - Manager
- Profiles

*Coming soon

Use the Send To feature

To use the "Send To" feature, complete the following steps, depending on the situation.

Situation	Steps
From Query Results	<ol style="list-style-type: none"> 1. Generate query results that contain the providers or institutions you want to send. 2. On the Results tab, click Send To, then and select the item to send 3. Click Next. 4. Find and select an destination, then click OK.
From the Credentialing Manager	<ol style="list-style-type: none"> 1. Open the Credentialing Manager. 2. In List view, select one or more providers or institutions to send. 3. In the form, click the key  and select the desired option. 4. Find and select an destination, then click OK.
From the Providers, Credentialing/Verification, Credentialing Group, and Group Practices forms	<ol style="list-style-type: none"> 1. Open the form for the provider, institution, or group you want to send. 2. In the form, click the key  and select the desired option. 3. Find and select an destination, then click OK.

Mass updates and mass actions

Some forms (and one reference list) include one of the following options to affect several records at once. The options are available when you have no unsaved changes.

The following actions share the same 'look-and-feel,' but the records affected depend on where you are in the system.

- **Mass update** - allows you to update the parent record fields from a form's list view. Child grids within a form are not updated when you update from list view.
- **Mass update grid records** - allows you to update the child records in select grids within a form or reference list.
- **Mass action** - allows you to perform an action on a collection of records, such as viewing reports, and dismissing or archiving records.

You can easily identify forms and grids with either the mass update or mass action option by the Select and Actions buttons that appear above the list or grid and the selection boxes included at the beginning of each grid or list view row.

Example grid with mass update options

Attendance		Email Attendees				
Select ▼ Actions ▼ Total: 6						
<input type="checkbox"/>	Provider	Attendance	CME Category	Local Category	Credits	
<input type="checkbox"/>	Johnathan Coleman Adam:	Present	[None or N/A]	[None or N/A]	2	
<input type="checkbox"/>	Aaa Aaaw	Present	I	[None or N/A]	2	
<input type="checkbox"/>	Carter G Abel	Present	II	Local Cat 2	2	
<input type="checkbox"/>	Rosalyn B. Ireland, DO	Present	I	[None or N/A]	2	
<input type="checkbox"/>	Samuel M. Jones, Jr, MD	Present	I	[None or N/A]	2	
<input type="checkbox"/>	Charles Evan Lawson, MD	Present	I	[None or N/A]	2	

1 - 6 of 6 items

Example CME by Event Attendance grid with mass update selectors highlighted

Use the selection boxes to manually select records or choose an option from the **Select** list:

- **All Pages** - selects all available records, regardless of the number of pages in the grid
- **Current Page** - selects records on the current grid page
- **None** - deselects all records

Tip

If you wish to change your selection, select **None** to clear existing selections, then make your new selection. This will help ensure that you only update the records intended. The record count can also help with verification.

Once you make a selection, the **Actions** list becomes available. When you select an action, the appropriate stepper is invoked to walk you through the mass process. Upon completion, the stepper automatically saves your changes.

Forms / Reference Lists with mass actions

Mass action type	Location
Mass update	F: Contract Manager F: Mass Update Insurance F: Mass Update Licenses F: Privileges F: NPDB F: Licenses (for license monitor) F: License Monitor Viewer S: License Monitor Configuration
Mass update grid	F: CME by Event (Attendance grid) F: Credentialing Group (Providers grid) L: Assignment Types (Officers grid)
Mass action	Completed Document Viewer Select modals

Mass update insurance

To update insurance information for multiple providers at once, complete one of the following steps.

1. To select provider insurance records to be updated, complete the following steps, depending on the situation.

Situation	Steps
From the Mass Update - Insurance form	<ol style="list-style-type: none"> 1. In the Mass Update - Insurance form grid, click Add ⊕. 2. In Select Provider(s), find and select one or more providers, then click OK.
From the Results tab of a query, or from the following Cactus forms: the Providers , Credentialing/Verification , Credentialing Group , Credentialing Manager , and Group Practices form.	For specific steps, see the Use the Send To feature (on page 103) topic in this user help documentation.

Warning!
Using the **Send To** feature will send **all** insurance records associated with a provider to the **Mass Update - Insurance** form. If you do not want certain insurance records to be updated, you will need to remove those specific insurance records from the **Mass Update - Insurance** form prior to executing the mass update. Refer to step 2 for information on how to remove provider insurance records.

2. Optional. To remove a provider insurance record, in the **New Insurance Information** section grid, select the record to be removed, then click **Remove** ⊖.
3. Select the items in the grid to be updated. (See [Mass updates and mass actions](#) (on page 103))
4. Click **Actions**, then click **Edit**.
 - This opens the mass update stepper, which walks you through the mass update process. (See [Steppers](#) (on page 118))
5. Complete the following actions in the stepper.
 - a. In step 1, **Insurance Information**, enter the information you want to update in the appropriate fields, then click **Next**.
 - b. Optional. In step 2, **Institution**, search for and select an institution, highlight it, then click **Next**.
 - c. In step 3, **Summary**, review the pending changes.
 - If the changes are correct, click **Finish**.
 - To edit any changes, click **Previous** to return to the steps to correct. Alternatively, you can click the previous step number. When finished, return to step 3 to finish.

Note
When completed, the stepper automatically saves any changes.

Mass update licenses

To update license expiration information for multiple providers at once, complete the following steps.

1. To select provider license records to be updated, complete the following steps, depending on the situation.

Situation	Steps
From the Mass Update - Licenses form	<ol style="list-style-type: none"> 1. In the Mass Update - Licenses form grid, click Add ⊕. 2. In Select Provider(s), find and select one or more providers, then click OK.
From the Results tab of a query, or from the following Cactus forms: the Providers , Credentialing/Verification , Credentialing Group , Credentialing Manager , and Group Practices form.	For specific steps, see Use the Send To feature (on page 103)

Warning!

Using the **Send To** feature will send **all** license records associated with a provider to the **Mass Update - Licenses** form. If you do not want certain license records to be updated, you will need to remove those specific license records from the **Mass Update - Licenses** form prior to executing the mass update. (See below to remove a record)

2. Optional. To remove a provider license record, in the **New License Information** section grid, select the record to be removed, then click **Remove** ⊖. Select the items in the grid to be updated. (See [Mass updates and mass actions](#) (on page 103))
3. Click **Actions**, then click **Edit**.
 - This opens the mass update stepper, which walks you through the mass update process. (See [Steppers](#) (on page 118))

4. Complete the following actions in the stepper.
 - a. In step 1, **License Information**, enter the information you want to update in the appropriate fields, then click **Next**.
 - b. Optional. In step 2, Institution, search for and select an institution, highlight it, then click **Next**.
 - c. In step 3, **Summary**, review the pending changes.
 - If the changes are correct, click **OK**.
 - To edit any changes, click **Previous** to return to the steps to correct. Alternatively, you can click the previous step number. When finished, return to step 3 to finish.

Note

When completed, the stepper automatically saves any changes.

Tip

To mass archive or dismiss license records, see [License Monitor Viewer](#) (on page 274).

Mass update contract records

You can mass update contract records from list view. Once you select your records and select the edit action, stepper will walk you through the fields you can update.

To mass update contract records, complete the following steps.

1. Open the [Contract Manager \(on page 264\)](#) form.
2. In **Select Contract**, select a contract, then click **OK**.
3. Select the records to include in the mass update using one of the available methods. (See [Mass updates and mass actions](#) (on page 103))
4. Click **Actions**, then **Edit**.
5. Update the field(s) as desired.
 - Changes made in the editing window will update all selected records.
 - Fields left blank will not be updated.
 - To remove all value from all selected records, click **Remove**  next to the value.
 - To undo the change to a value, click **Undo** .
6. Click **Next**.
7. Click **OK**.

Note

When the form is saved, changes made to the field(s) will automatically update the corresponding fields of all provider contract records selected for mass updating.

Basic work item elements

Although the application includes several different work item types, many elements within these items are reused throughout the program to give you a more standardized experience. These include the following elements.

- **Modals (on page 113) (or dialog boxes)** - are generally a series of related steps within a smaller program window that must be addressed before you are returned to the main program window. There are modals for finding, adding or deleting records, confirming specific actions on a record, as well as warning and error acknowledgments.
- **Grids (on page 120)**- contain specific provider data where the provider can have more than one entry. For instance, a provider can have multiple certification, specialty, and address records. Most grids allow you to view, edit, sort, and filter the data, as well as add and remove records.
- **Steppers (on page 118)** - walk you through a series of steps or actions in a specific order to obtain a result.
- **Buttons and icons (on page 123)** - allow you to interact with a work item, such as expand a grid, add/delete a record, or open a memo field for data entry. If you are unsure what a button or icon can do, hover over it to see the label. You will find various buttons and icons within a form, and also in the **Toolbar** (on page 19).
- **Field types (on page 124)** - help simplify and standardize data entry, which in turn helps produce better reports. For instance date fields ensure that dates are entered in the same format, and list boxes reduce spelling errors.
- **Manage error messages (on page 126)**- (a type of modal) can include cautions or warnings, or even include an email link to contact symplr support with the error details.

Supported browsers

symplr Provider is currently compatible with the following web browsers.

Browser Name	Minimum Version	Operating Systems
Chrome	86	Windows, macOS
Firefox	81	Windows, macOS
Microsoft Edge	86	Windows, macOS
Safari	14	macOS

Tip

User installed browser extensions and plugins are not supported when using symplr Provider.

[Related topics](#)

[symplr Provider and browser autofill](#) (on the next page)

[Date formats](#) (on page 112)

Web browser basics

symplr Provider is a web-based application. You can use standard browser functions to perform such actions as adjusting the font size, navigating through the system using the browsers back and forward buttons, and refreshing the screen. See your browser help if you need more information on how your browser functions.

Tip

If you need to collaborate with other symplr Provider users, you can copy the web page address (or URL) and share the link with them. Recipients can then paste the URL into a browser address field to load the specific page and record. Only recipients who have access to symplr Provider and security rights to the record will be able to log in and view the record. You can also bookmark the URL as any other webpage.

symplr Provider and browser autofill

Autofill helps speed data entry and increase data integrity by suggesting already saved content in a given field based on what you have typed. Both symplr Provider and the browsers supported by symplr Provider have autofill capabilities.

symplr Provider uses autofill to help find providers in the database and autofill cities and ZIP Codes when entering addresses. An optional autofill-based [Address validation](#) (on page 134) feature can also be turned on by your administrator.

Browser autofill tends to contain your personal information that you have used to fill in forms on the internet, such as your name, shipping/billing addresses, email, phone number, passwords, credit card information and so on. This may or may not be activated on your work computer.

Because some of the autofill fields overlap, browser autofill may come into contention with symplr Provider's autofill and address validation features. In order to effectively use symplr Provider's autofill, you can turn off the browser autofill.

Disable browser autofill (highly recommended)

You can disable/re-enable your browser autofill in the browser settings. For help with your specific browser, search the internet for "Disable browser autofill settings" to get your browser's latest instructions. Alternatively, contact your system administrator or support@symplr.com for help resolving this issue.

Keyboard shortcuts

The following tables summarize the keyboard shortcuts you can use when working with symplr Provider through any of the supported browsers. (See [Supported browsers](#) (on the previous page))

General shortcuts

The following keyboard shortcuts are available when symlr Provider is open.

Shortcut	Description
Ctrl+[click in Quick Launch]	Opens a new work item or find modal in a new browser tab
Shift+[click in Quick Launch]	Opens a new work item for the provider in focus
F5	Refreshes symlr Provider - Refreshes the open record by reloading it and reverting back to previously saved changes. Reloads symlr Provider and returns you to the same screen as before the refresh. The cache is also refreshed using F5. If you have unsaved changes on the page, you will be prompted to verify the action.

In date boxes

The following keyboard shortcuts are available when your cursor is in a symlr Provider date box.

Note

Using a keyboard shortcut in a date box already containing a date will only update the day and/or month, not the year. For example, typing “R” in a date box containing 5/31/10 will update the date to 12/31/10.

Shortcut	Description
T	Today's date
Y	01/01/current year
R	12/31/current year
M	First day of current month
H	Last day of current month
+/-	Plus/minus one day
Shift +/-	Plus/minus one month
Shift + R	Plus one year
Shift + Y	Minus one year

For a list of allowable date entry formats, [Date formats](#) (on the next page).

Tip

You can copy a date from one date field to another by using the standard Windows cut & paste keyboard shortcuts:

1. Ctrl + A - In the source field, highlight the contents of the field.
2. Ctrl + C - In the source field, copy the highlighted content.
3. Ctrl + V - In the target field, paste the highlighted content.

With form open

The following keyboard shortcuts are available when a symplr Provider form is open.

Shortcut	Description
Ctrl+[Close button]	Closes all open work items
Ctrl+[Home]	Displays first record
Ctrl+[End]	Displays last record
Ctrl+[Down arrow]	Displays next record
Ctrl+[Up arrow]	Displays previous record

Date formats

The following date formats may be used in symplr Provider. For all of these examples, assume that the current month is May, the current day is the 13th, and the current year is 2016.

Input (N=number)	Input Example(s)	Interpreted Date Output	Format Logic
N	1	May 1, 2016	Interpreted as the day of the current month of the current year
NN	12 33	May 12, 2016 May 13, 2033	If valid, interpreted as the day of the current month of the current year. Otherwise, interpreted as a two-digit year, rollover century is applied, and combined with current day and current month.

Input (N=number)	Input Example(s)	Interpreted Date Output	Format Logic
NNNN	1999 2143	May 13, 1999 May 13, 2143	Interpreted as a four-digit year (must be greater than 1753) and combined with the current day and current month
N/N, N/N/ NN/N, NN/N/ N/NN, N/NN/ NN/NN, NN/NN/	1/1 or 1/1/ 12/1 or 12/1/ 2/22 or 2/22/ 12/22 or 12/22/	January 1, 2016 December 1, 2016 February 22, 2016 December 22, 2016	If valid, interpreted as month/day of the current year
N/NNNN NN/NNNN	1/2008 11/2008	January 13, 2008 November 13, 2008	If valid, interpreted as month/year and combined with the current day
NNNNNN N/N/N, N/N/NN N/NN/N or N/NN/NN NN/N/N or NN/N/NN NN/NN/N or NN/NN/NN	010108 1/1/8 or 1/1/08 1/13/8 or 1/13/08 11/2/8 or 11/2/08 11/21/8 or 11/21/08	January 1, 2008 January 1, 2008 January 13, 2008 November 2, 2008 November 21, 2008	If valid, interpreted as month/day/ (two-digit year, with rollover century applied)
NNNNNNNN	01012008	January 1, 2008	If valid, interpreted as month/day/year
N/N/NNNN NN/N/NNNN N/NN/NNNN NN/NN/NNNN	1/1/2008 11/2/2008 1/13/2008 10/14/2008	January 1, 2008 November 2, 2008 January 13, 2008 October 14, 2008	If valid, interpreted as month/day/year

Modals

Modals, or shared components, are generally a series of related steps within a smaller program window that must be addressed before you are returned to the main program window. Some modals warn that your actions may have a specific consequence. The [Steppers](#) (on page 118) topic covers the specialized type of modal that walks you through a series of steps.

You will find standardized modals throughout the program as you work with your records. Some modal titles may change slightly based on the situation, but the actions remain the same.

To complete a series of actions in a modal, you will generally click **OK** to finalize the modal actions and return to the main program window.

Here is a small representation of modals you will encounter.

Find (Select) Modal

The Select modal can sometimes be accessed within a form by clicking **Find**. For example at the top of the Education form you can search for an institution.

Note

You can include inactive items in your search, and if your results include more than 10 items, you can navigate through the additional records and adjust the number of items shown in each page of the modal.

Step through the find modal

To finish the find modal and open the form, complete the following steps.

1. In the **Name** box, type all or part of a name, then click **Go**.
2. Select an entry from the search results, then click **OK**.

The screenshot shows a modal titled "Find Provider" with a search bar containing "G", a "Search" button, and an "Include Inactive" checkbox. Below the search bar, it says "Found 6 results" and displays a table with columns for Name, Prov. ID, and Oth. The table lists six entries: Toph Bei Fong, MBA (Prov. ID 2790816), Danny Gallant, Test (Prov. ID 3-28087), Ffff Gggg Gggg, Olga Mary Green, Jane Grey, MD, and Tee Grizzley. At the bottom of the modal are "OK" and "Cancel" buttons.

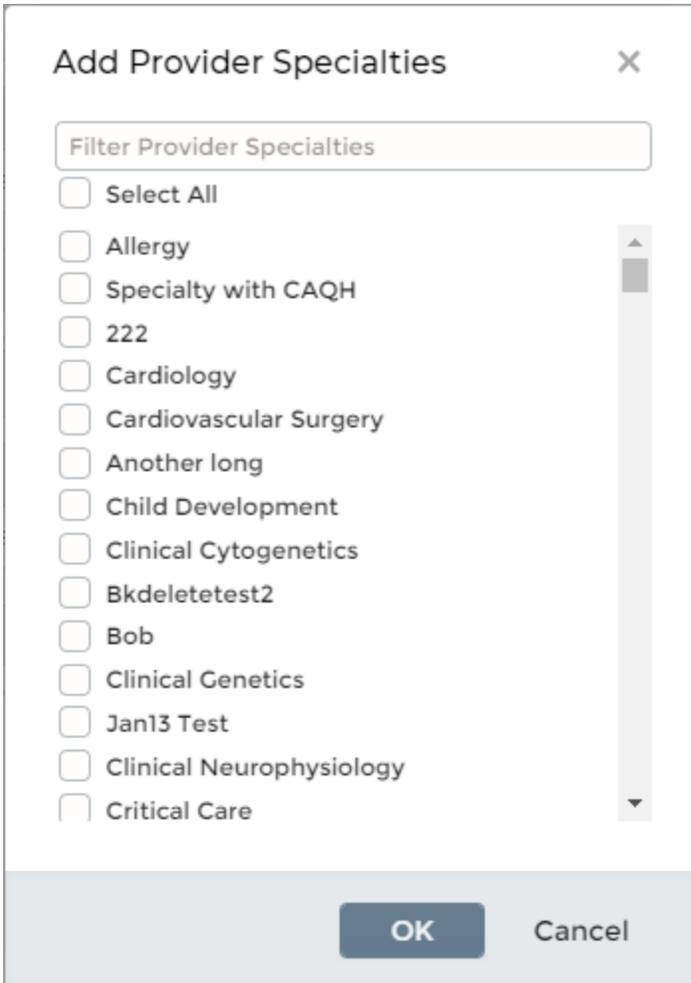
Name	Prov. ID	Oth
Toph Bei Fong, MBA	2790816	Ghi
Danny Gallant, Test	3-28087	
Ffff Gggg Gggg		
Olga Mary Green		
Jane Grey, MD		
Tee Grizzley		

Tip

In some specific scenarios, you can multi-select items by selecting the check boxes in front of the items to you want to select. The find modal above shows a single-select option; the following Add or select modal shows a multi-select option.

Add or Select modal

In some instances, when you want to add an external item, such as a board or a specialty, you are presented with a list of available options. In some cases you can filter items, and choose one or more items (including **Select All**). Click **OK** to finalize the selection.



Tip
If you filter a multi-select list then click Select All, the list of filtered items will be selected.

City/State modal (for addresses)

When you enter a United States ZIP Code, the system checks for the city and state associated with that ZIP Code. If only one city/state/county exists for the ZIP Code, the system will auto-populate those fields. If multiple options exist for a single ZIP Code, you can select from a list of available options to populate the fields. If you edit the ZIP Code, the city/state/county will also be updated to match.

Warning!
If your browser has autofill activated, it may cause contention with this modal. (See [symplr Provider and browser autofill](#) (on page 110).)

Address Information

▼ Street Address

Location Name

Manager

Address

Apt., Suite, etc.

City State Zip

County

Country

NO RESULTS FOUND

▼ Categories, Services, Languages

ZIP Code entry showing valid ZIP Code format, but no results. Click **X** to clear the field and try again.

▼ Street Address

Location Name

Manager

Address

Apt., Suite, etc.

City State Zip

County

Country

Address Tax ID

Phone

Alt. Phone

Fax

Email

Notes

Invalid zip code

ZIP Code entry showing Canadian postal code.

The screenshot shows a form titled "Street Address" with several input fields: "Location Name" (disabled), "Manager", "Address", "Apt., Suite, etc.", "City", "State", "Zip", "County", and "Country". The "Zip" field contains "10018" and has a dropdown menu open showing three options: "Manhattan, NY (New York)", "Midtown, NY (New York)", and "New York, NY (New York)".

ZIP Code with several city/state/county options. Click an option to fill the fields.

The screenshot shows the same "Street Address" form, but now the fields are populated: "City" is "Midtown", "State" is "NY", "Zip" is "10018", "County" is "New York", and "Country" is "United States".

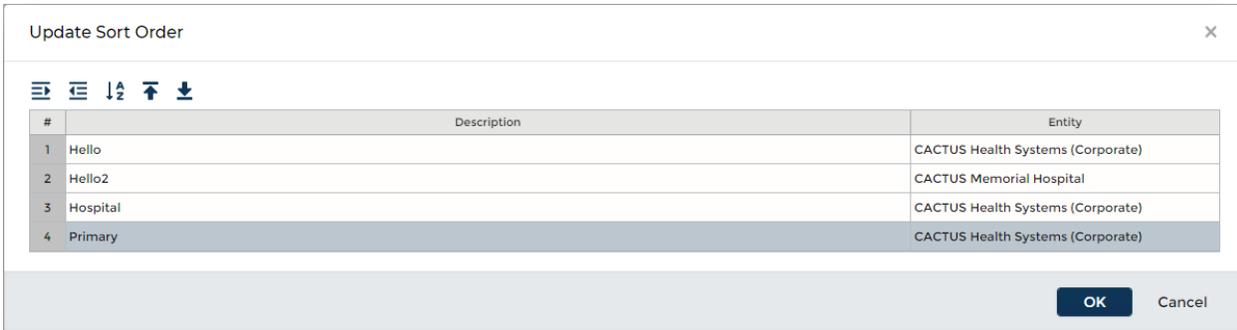
ZIP Code selection with associated city/state/county (and country) autofilled.

Confirmation modal

This modal verifies that you want to perform an action. You can either acknowledge or cancel the action. This acts as a safeguard before you perform an action that cannot be undone, such as a record deletion.

Update Sort Order modal

You can update the sort order and change display indentation in reference lists and select forms. When available, Sort Order is enabled on the toolbar under **Admin**.



If you are unsure of an icon's purpose, hover over it to show the icon's name. You can perform the following actions:

- To establish a hierarchical arrangement, select one or more items in the list then click **Indent Right** or **Indent Left** .
- Click **Sort by Alpha** once to sort in ascending order, and twice to sort in descending order.
- Select an item in the list then click **Move to Top** or **Move to Bottom** to move the item to the beginning or end of the list.
- Hover over the item to move until you see the drag-and-drop crossed double arrows , then drag and drop the item to the desired location.

Tip
 You can also drag and drop an item anywhere within the list. The number to the left of the entries help you orient yourself when moving items in longer lists.
 For records whose text is not fully visible in the grid, you can hover over the field to see the full field contents.

Warnings and Errors modals

Warnings and errors alert you to a condition that may need your attention. You must acknowledge the warning or error before you can return to item that produced the message. Warnings will allow you to save an item without taking any action; errors must be fixed before you can save the item. (See [Manage error messages](#) (on page 126))

Steppers

Steppers are another type of shared component that you will find across the application. Steppers walk you through a series of actions in a specific order. In some cases, not all steps will be required; in other cases, you will not be able to proceed to the next step until you complete an action in the current step.

When you enter a stepper modal, you will see the numbered steps listed across the top of each dialog box. The active step will be highlighted, and the available actions listed below step list. If an action is

optional in this step, you can click the next step number at the top of the window, or Next at the bottom right. If an action is mandatory, these two options will be disabled until you perform the required action. You can cancel out of the stepper from any step. For additional help while in a stepper, click .

Steppers will allow you to move back-and-forth between steps in order, using either the step numbers or Next and Previous unless a required action has to be performed.

When editing a field within a stepper, you can undo your unsaved changes by clicking . To remove existing an existing entry, click .

At the end of the stepper, you will see a summary of the changes you have made. Once you are satisfied with your edits, you click Finish to save the changes and close out of the stepper.

Example stepper images (Mass update license stepper)

The screenshot shows a stepper modal titled "Editing 3 Provider License". It consists of three steps: 1. License Information, 2. Institution (Optional), and 3. Summary. The first step is active and contains the following fields:

- License Section:**
 - Status: Current License (dropdown)
 - Expiration: MM/DD/YYYY (calendar icon)
 - State: (text input)
 - Field of Licensure: [None or N/A] (dropdown)
 - CAQH Type: [None or N/A] (dropdown)
- User Defined Section:**
 - Lic_1: [None or N/A] (dropdown)
 - Lic_2: MM/DD/YYYY (calendar icon)
 - Lic_3: (checkbox)
 - Lic_4: [None or N/A] (dropdown)
 - Lic_5: MM/DD/YYYY (calendar icon)
 - Lic_6: (checkbox)
 - Lic_7: [None or N/A] (dropdown)
 - Lic_8: MM/DD/YYYY (calendar icon)
 - Lic_9: (checkbox)
 - Lic_a: (text input)
 - Lic_b: 0.00 (spinner)
 - Lic_c:  (icon)
 - Lic_d: (text input)
 - Lic_e: 0.00 (spinner)
 - Lic_f:  (icon)
 - Lic_g: (text input)
 - Lic_h: 0.00 (spinner)
 - Lic_i:  (icon)

At the bottom right, there are "Next" and "Cancel" buttons.

First step of a stepper modal. This example show example action icons for editable fields. The red text indicates a required field.

Editing 3 Provider License ?

1 License Information — 2 Institution (Optional) — 3 Summary

Select Institution (optional)

Institution Name Search Include inactive

Found 296 results

Lookup	Name	Address L1	Address L2	City	State	Zip	Contact	NPI	Phone
	T.D. Medical College	Kerala University	PROV: Kerala State	Allepey 5					
	T.J. Samson Community Hospital	1301 North Race Street		Glasgow	KY	42141			502651
	Tacoma General Hospital	315 S. K Street	Box 5299	Tacoma	WA	98405			206552
	Tadzikskij Medicinskij Inst	Abu Ali Ibn Sino	Prospekt Lenina 123	Dushanbe					
	Tahleqah City Hospital	1400 East Downing Street	Box 1008	Tahlequah	OK	74464			918456
	Tahoe Forest Hospital District	10121 Pine Avenue	Box 759	Truckee	CA	96160			916582
	Taipei Medical College	250 Wu-Hsing Street		Taipei					
	Takecare Corporation	2300 Clayton Road Suite 1000		Concord	CA	945202457			800633
	Takecare Employee	7979 East		Denver	CO	80237			800071

10 items per page 1 - 10 of 296 items

Previous Next Cancel

Final step of a stepper modal where all actions are complete. User can move back one step, cancel, or finalize the stepper.

Editing 3 Provider License ?

1 License Information — 2 Institution (Optional) — 3 Summary

Pending Changes

License Information

Status Current License

Previous Finish Cancel

Final step of a stepper modal where all actions are complete. User can move back one step, cancel, or finalize the stepper.

Grids

When a record can contain multiple instances of similar information, these sub-records appear in a grid. For instance a provider can have multiple addresses, specialties or boards. Each row in the grid is a record that contains the fields named in each column. Grids appear throughout symlr Provider, and the actions you can perform on them are very similar.

To sort the grid by a specific column (field), click on a column name. Click the column name again to change the sort order. You can sort in ascending or descending order, or return to the default order.

Tip

A sorted column name includes an up or down arrow to indicate the sort order.



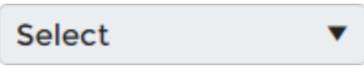
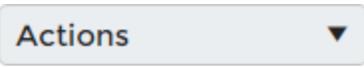
In most grids, you can scroll through the records, and edit the fields. The following table lists the more common action icons that can appear beside a grid or in grid rows. The available options vary by grid.

Action	Icon	Description
Add Row		Adds a new blank record.
Delete Row		Removes the highlighted record.
View Details		Shows the highlighted record's details below the grid. When you view details in this view, it is often read-only. (See Open an item below for editing.)
Hide Details		Hides the record details below the grid. This icon replaces the View Details icon when you have expanded a record.
Filter		Each column filter allows you to view only those records that meet your criteria for that column. You can apply multiple filters at the same time.
Filter (active)		Click this icon to remove a filter.
Select an item		Available when you can multi-select items in a grid. Multi-select often appears with Select and Actions above the grid.
Open an item		When included in a grid, this icon opens the selected record in the grid in detail view for editing.
Open an attachment		Click to view an attachment to the record.
Download a file		Download the corresponding file in the grid, such as an attachment or report.

List view grids that allow you to toggle between detail and list view contain some additional options. You can decide which columns to show in list view, and edit the content directly from list view (based on your security settings and field settings). You can also multi-select records, and perform actions on your selection.

Tip

All reference lists and many forms open in list view. You know you are in list view when you can toggle between records from the [Toolbar](#) (on page 19).

Action	Icon	Description
Manage columns		Allows you to select which columns to show in the list view grid. When you change column selections, click Refresh to see your changes.
Select		Gives you options for multi-selecting records in the grid.
Actions		Becomes active once you make a record selection. Available actions can vary by form.

Tip

Other icons not included here may appear in some grids. To learn more about any text-less icon or button, simply hover over it to view the label. You can also hover over column that does not display the entire contents of the field to view the full text.

Other functionality includes changing the column order and mass updating grid contents.

Modify grid settings

To modify the grid settings, complete the following steps.

Tip

Grid setting changes are saved automatically.

1. [Search for an item](#) (on page 18).
2. To adjust the column width, complete the following substeps.
 - a. Hover over the column divider to be re-sized.
 - b. When the cursor changes to a double-arrow, select and drag the column divider to the left or right, as desired.
3. To rearrange the columns, click the name of the column to be moved, and drag it left or right, as desired.
4. To display additional details, in the grid, select the desired row, then click **View Details** . The properties of the selected row appear beneath the grid.

5. To modify the number of results shown per page in the grid, click the **items per page** list and select the desired results to show per page.

Mass edit select grids

In some form grids and reference lists, you can bulk update records within the grid.

Tip

You can quickly identify a grid with mass update option by the Select and Actions buttons that appear above the grid and the selection boxes included at the beginning of each grid or list view row.

To perform a mass update, complete the following steps.

1. Open the form containing the grid to mass update.
 - If you make any changes to the form, save them before continuing.
2. Scroll down to the grid to update.
3. Select the items in the grid to be updated.
4. In the left column, manually check the records to update, or make your selections using **Select**. (See [Mass updates and mass actions](#) (on page 103))
5. To launch the update stepper modal, click **Actions**, then **Edit**.
6. Update one or more of the fields, then click **Next**.
7. Click **Save**.

Tip

Some of the items that include grids that can be mass updated are listed below.

- **Forms:**
 - CME by Event (Attendance grid)
 - Credentialing Group (Providers grid)
 - Group Practices (Addresses tab > Providers grid > Address Type field)
- **Reference lists:** Assignment Types (Officer's grid)
- **System forms:** Security Manager

Buttons and icons

There are several buttons and icons used and reused to perform actions throughout symplr Provider. Most are self-explanatory and familiar to most computer users, such as arrows indicating a direction, or a magnifying glass for searching. Some will include text; others include pop-up descriptions when you hover over the button with your mouse.

Some common types of actions performed by buttons include:

- toggling a condition, such as sorting a column in ascending or descending order
- presenting a list of options for your selection
- opening a new window of information, such as search results, or a window to type notes

Tip

Some buttons can appear in a disabled state when the underlying actions are not available. Disabled buttons are 'grayed out.' Some buttons, such as **Attachments** on the toolbar change color when there are items to view when you click the button.

Field types

When working with data as complex and varied as required for credentialing and privileging, it is essential to have standardized input. Spelling errors and multiple date formats, for instance, can render your reports meaningless because your queries and filters would not pick up all the pertinent records. Different types of fields help standardize your input. The application includes the following field types.

Field type	Image	Description
Text boxes		allow you to type in information, such as a name.
Check boxes		allow you to select or deselect an item. A filled check box indicates a selected item.
Spinners		allow you to increase or decrease a value by clicking an up or down arrow. You can also simply click in the field and type in a desired value.
Lists (drop-downs, menus)		allow you to select from a list of items. You click the arrow to display the list of options, then click an option to select it and close the list. Lists will often include a filter help you quickly find the option you want. Note Many lists are populated by Reference lists (on page 243).
Memo fields		allow you to type a variable amount of text. When you hover over the icon, you can see the field contents, or click on the icon to open the field for editing. Memo fields can have different labels, such as Notes, Contact information, and so on.

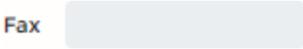
To help orient you in a window, when you select a field, the outline turns slightly darker than unselected fields. Read-only fields have a light gray background to indicate that you cannot edit them.

Short Description and Description fields

Throughout the program, you will find short description fields paired with longer description field in forms and reference lists. To automatically copy the short description to the description field, enter the short description and save the record. Alternatively, you can enter different text in the description field.

Field notifications

symplr Provider includes numerous informational messages and alerts to help you. In addition, there are several field indicators that can supply additional information. Hover over alert indicators to view a tooltip or error message to help you resolve the issue.

Image	Description
	A grayed out field indicates that the field is read-only.
	A yellow outline indicates a warning, such as an incomplete entry, or a start date that is later than the end date.
	A red outline indicates that a field is required or has an error.
	A yield sign next to a field or in a grid column indicates that a field status that may need attention, such as an expired license.

Edit field types

With the appropriate security settings, you can view or edit field settings in the active form. You can also open the associated reference table for a drop-down to manage list entries. When you select Field Action, you activate a menu for each editable field.

Tip

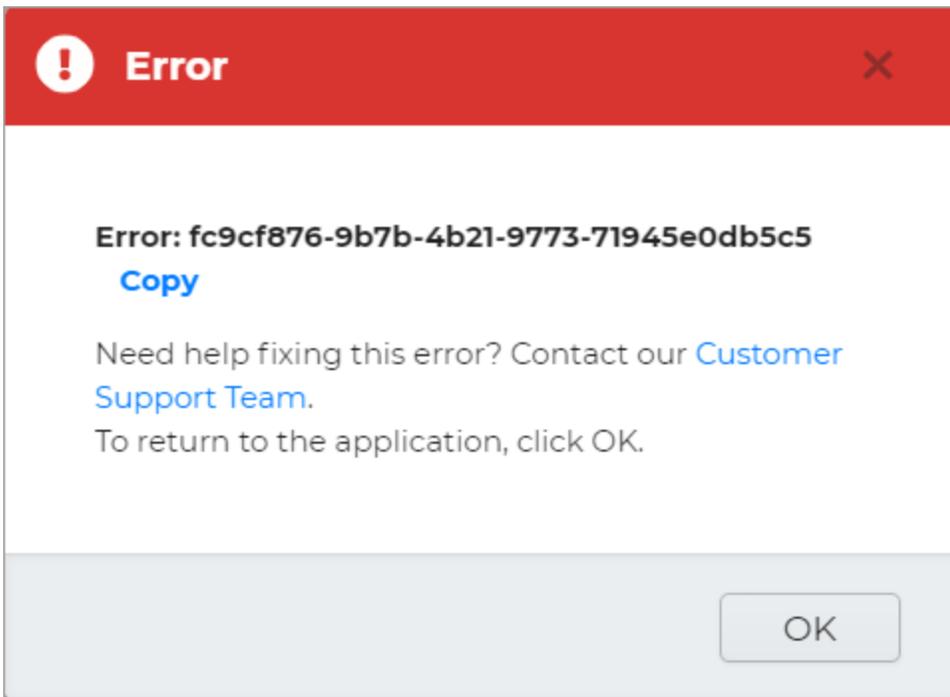
The menu icon is also often known as a three-dot menu.

1. With the form you wish to edit in focus, click **More**, then **Field Action**.
2. To the right of the field to edit, click , then select the desired option.
 - **Edit** (list items only) - opens the associated reference table for editing.
 - **Property Sheet** - displays Item, data, and object properties for a field.

Manage error messages

symplr Provider helps you troubleshoot issues with two basic types of error messages. The first type is a basic informational message that states what happened. The second message appears when the error may need symplr support and contains a link to help you contact symplr support with the information.

Example error message with link to symplr customer support.



Complete the following steps to respond to an error message with the customer support link.

1. Optional. To copy the error ID for your own information, click **Copy**, then paste locally (for instance to a Word document).
2. Click the **Customer Support Team** link to open a new email message.
 - The recipient email address and subject line will auto-populate.
3. To help the support team troubleshoot the error, in the body of the message include the following information.
 - what you were doing in symplr Provider when the error occurred
 - your contact information
4. Once you have sent the email, click **OK** on the error message to close.

Workspace customization

You can customize the symplr Provider interface to reflect a more personal experience. Customizing your workspace allows you a certain amount of control over the way you interact with the application, resulting in an increase in efficiency and usability.

Each time you log on to symplr Provider, your workspace reflects your customized settings, or user preferences. The security settings designated by your organization's symplr Provider system administrator are respected.

Some of the areas you can customize include:

- Window and pane sizing (See note in [Program layout](#) (on page 16))
- [Forms](#) (on page 23) - expand or collapse sections
- [Grids](#) (on page 120) - manipulate column order, sizing, and sorting
- Widget placement and sizing (See [Arrange widgets](#) (on page 129))
- [Pins and shortcuts](#) (below)

Pins and shortcuts

Pins and shortcuts are quick links you set up to quickly access regularly used items. Pins create a link to a specific record by allowing you to link to a provider record, query, report, or document. Shortcuts link to a specific form, reference list, or system form.

You can create a pin or shortcut through Pin on the toolbar.

Note

Clearing your user preferences does not affect pins and shortcuts.

Manage pins

Pins display on the Home hub and allow you to quickly open the form, query, document, report, reference list, or profile for records you work with most often. You can create, open, and remove pins.

Create a pin

To create a pin, complete the following steps.

1. Open the record you want to pin.
2. On the [Toolbar](#) (on page 19), click **Pin**, then select **Pin record**.
3. Optional. In **Pin Record**, add a subtitle.
4. Click **OK**.

Open a pin

On the **Home** hub, click the pin name.

Remove a pin

On the **Home** hub, click **Remove**  next to the pin to be deleted.

Rearrange pin order

When two or more pins exist on the Home hub, you can reorder them.

1. Next to **Pins**, click **Sort** .
2. Select any of the following methods to change the sort order.
 - Click **Sort by Alpha**  once to sort in ascending order, and twice to sort in descending order.
 - Select an item in the list then click **Move to Top** or **Move to Bottom** to move the item to the beginning or end of the list.  
 - Hover over the item to move until you see the drag-and-drop crossed double arrows , then drag and drop the item to the desired location.

Manage shortcuts

Shortcuts appear on the Home hub and allow you to quickly open the forms you work with most often. You can create, open, and remove shortcuts.

Create a shortcut

To create a shortcut, complete the following steps.

1. Open the form for which you want to create a shortcut.
2. On the **Toolbar** (on page 19), click **Pin**, then select **Create shortcut**.

Open a shortcut

On the **Home** hub, click the shortcut name.

Remove a shortcut

On the **Home** hub, click **Remove**  next to the shortcut to be deleted.

Rearrange shortcut order

When two or more shortcuts exist on the Home hub, you can reorder them.

1. Next to **Shortcuts**, click **Sort** .
2. Select any of the following methods to change the sort order.
 - Click **Sort by Alpha**  once to sort in ascending order, and twice to sort in descending order.
 - Select an item in the list then click **Move to Top** or **Move to Bottom** to move the item to the beginning or end of the list.  
 - Hover over the item to move until you see the drag-and-drop crossed double arrows , then drag and drop the item to the desired location.

Arrange widgets

You can move and re-size widgets in both the Team and Personal tabs on the Dashboard. The changes you make are automatically saved for future sessions.

Move a widget

1. On the **Dashboard** hub, find the widget to move, then hover over the widget header until you see a four-headed arrow .
2. Click and drag the widget to the desired location.

Resize a widget

To resize a widget, hover over a widget edge until you see a double-headed arrow , then click and drag to resize.

Tip

The direction of the arrow changes based on where you can resize.

- To change the width, hover over the left or right side of the widget.
- To change the height, hover over the top or bottom of the widget.
- To change both height and width at the same time, hover over a corner of the widget.

Tip

If you drag beyond the margins of the Dashboard page, the widget will snap back to the original size.

Manage user preferences

When you customize various elements on a form, these changes are saved. You can apply your user preferences to all entities or just the current entity. You can also remove your customizations one-by-one or all at once.

Note

When you change a user preference, the changes are immediate, however some changes require a browser refresh.

To manage your user preferences, complete the following steps.

1. On the **Titlebar** (on page 21), click your user name, then from the list, select **Preferences**.
2. In **Manage User Preferences**, complete any of the following optional steps.
 - a. To set the scope of your preferences, select either **All Entities** or **Current Entity**.
 - b. To delete user preferences select one of the following substeps.
 - i. To delete all your user preferences, select **Clear All** ⊖.
 - ii. To delete a single entry, select **Delete** ⊖ in the item row.
3. Click **Close**.

Getting started with records

Records contain the data that is at the core of this program, and are saved in the underlying database. When you enter data in a form, you are creating or editing records. When you access other work items, such as queries, documents, and reports, you accessing record data.

Institution information, such as location, name, and description are often part of record information. Instead of requiring you to input this information every time an institution is referenced, the application allows you to select an institution from an internal dictionary. This internal institution dictionary contains medical and dental schools, hospitals, boards and other institutions within the United States and throughout the world. Institutions may be added to the internal dictionary by your application system administrator and edited as needed.

This section covers the creation of common record types, as well as record inactivation and deletion.

Create a new provider record

To create a new provider record, complete the following steps.

1. To open the **Create New Provider** form, complete one of the following procedures.

Situation	Steps
From the Home hub	<ol style="list-style-type: none"> 1. In the Home hub, click Create New . 2. In the Create New box, select Provider .
From the Global Search	<ol style="list-style-type: none"> 1. Search for a provider. 2. Under Search Results, click New Provider.

2. To ensure the provider does not have an existing provider record in the system, in **Create New Provider**, type the first and last name of the provider in the appropriate boxes, and then click **Search**.

Note

If the last name of the provider is unknown, type the known information , for example, the provider's NPI or SSN, into the appropriate field.

3. If there are no providers in the database that currently match the search criteria entered, click **New**.
 - If your program configuration is for a single entity only, the **Providers** form opens.
 - If your program configuration includes multiple entities, in the **Add Entities** dialog box, select each entity to which you will be adding your new provider, then click **OK**.

4. Optional. The application is designed to perform either individual or institutional credentialing. The **Individual** designation is selected by default. To change the designation of the record to institution, in the **Providers** form, on the **Demographics** tab, in the **Information** section, select the **Institution** radio button. The record will change from an individual provider record to an institutional record and the existing fields will change accordingly.
5. On the **Demographics** tab, enter the necessary information about the individual or institution. Sections available on this tab are described in the following table.

Section	Description
Information	Active status, ID, Name, Phone, Email, and other information identifying the individual or institution
Numbers/Codes	Individual: NPI, Medicare, and Medicaid numbers, UPIN, FNIN, ITIN, and Taxonomy Code Provincial Billing #, MINC (Canada) Institution: NPI, Medicare, and Medicaid numbers, Taxonomy Code and Tax ID
Additional IDs	ID number, Type, Start Date and End Date of any additional ID pertaining to the individual or institution
Type	Individual: Corporate Status, Provider Category, Practice Type, Area Since Institution: Tax Status, Facility Type, Corp. Type, Year Opened, NPDB Ent. Desc. and NPDB Ent. Type
Contacts	Contact information such as names, phone numbers and email addresses, for the individual or institution's designated as contact (s)
Citizenship & Languages*	Individual's POB, Ethnicity, Citizenship, and Visa information, as well as Languages spoken
Other	Individual: Additional information, such as any name under which the individual may have practiced throughout their career, Marital Status, Spouse Name, Military Branch, Institution: Incorporation information, Accrediting Agency, and Supervisor
CAQH*	CAQH ID, Method of Contact, and Provider Type
User Defined	If your organization requires you to track additional information about the provider that does not apply to the existing sections symplr Provider provides, enter the required information in this section.

**Section available for "Individual" records only.*

- On the entity tab, select the **General** tab and enter the provider's information as it relates to the entity. Sections available on this tab are described in the following table.

Note
 If entering provider data in multiple entities, use record navigation  on the [Toolbar](#) (on page 19) to view and toggle between the entity records.

Section	Description
Entity	ID, appointment From and To dates, Status, Category, and additional credentialing-related information
Other	Title, Medical Director Notes, and other required information
Entity Additional IDs	ID number, Type, Start and End Date of any additional ID pertaining to the individual or institution at this entity
Continuous Query	Information related to NPDB Continuous Query
Entity Addresses	Addresses currently associated with the individual or institution at this entity To add the addresses information to this section, the information must first be entered in the Provider Addresses form.
Entity Specialties	Specialties currently associated with the individual or institution at this entity <div style="border: 1px solid blue; border-radius: 10px; padding: 5px; margin-top: 10px;"> <p>Note To add specialty information to this section, the information must first be entered in the Specialties/Boards form.</p> </div>
User Defined	If your organization requires you to track additional information about the provider that does not apply to the existing sections sympplr Provider provides, enter the required information in this section.

- Optional. If your organization has licensed Application Manager, on the entity tab, select the **Application Manager** tab and add the provider to an **Application Manager** process.

Tip
 The 'entity' tab displays the name of your current entity.

- Optional. If your organization has licensed our **Committee Manager**, and/or **Provider Profile** web products, on the **Web** tab, grant the provider access to the module(s).

Note
 Access to the **Committee Manager** and/or **Provider Profile** modules is typically granted by the sympplr Provider system administrator at your organization.

9. Optional. [Create an assignment record](#) (on page 139).
10. Optional. [Create an address record](#) (below).
11. Optional. [Create an affiliation record](#) (on the next page).
12. Optional. [Create an education record](#) (on page 142).
13. Optional. [Create an insurance record](#) (on page 144).
14. Optional. [Create a license record](#) (on page 145).
15. Optional. [Create an alternate provider record](#) (on page 137).
16. Optional. [Create a providers area of interest record](#) (on page 138).
17. Optional. [Create a health record](#) (on page 143).
18. Click **Save**.

Create an address record

For detailed information on how to create provider address and group practice records, please refer to the following related topics.

[Create a provider address record](#) (on page 199)

[Create a group practice record](#) (on page 201)

[Create a group practice address](#) (on page 203)

[Add or edit providers in a group practice](#) (on page 203)

[Remove a provider from a group practice](#) (on page 204)

Address validation

symplr Provider address validation is an optional feature that may be enabled by your symplr Provider administrator via the System Information form. It is available to all clients based in the United States and Puerto Rico, and no additional fees or licenses are required to use it. The feature ensures the accuracy of U.S. and Puerto Rico address information entered into the symplr Provider database by cross-referencing it with a United States Postal Service (USPS) master database that is updated monthly. In addition, address validation status and date fields can be painted or selected to include in queries.

Warning!

- If you use browser autofill, please see [symplr Provider and browser autofill](#) (on page 110)
- If you set field access, do not paint the address validation fields as Read Only, as this will prevent any auto-updates to those fields.

Working with address validation

Your Application System Administrator can enable address validation on the system. When enabled, you can expect the following behavior:

- After typing at least four characters within the **Address** box located on the Provider Addresses, Group Practices, or Institutions forms, address suggestions already validated by the United States Postal Service (USPS) will appear for selection. If you enter an address located outside of the U.S. or Puerto Rico, no address suggestions will be offered.
- You can use the up/down arrow keys, or mouse, to move through the address suggestions.
- After selecting one of the suggested addresses, either click the mouse button or press the **Enter** or **Tab** key on the keyboard. Clicking the mouse button or pressing the **Enter** key will populate the address fields with the selected address and the cursor will remain in the **Address** box. Pressing the **Tab** key will populate the address fields with the selected address and move the cursor to the next input box.
- When an address suggestion is selected, a status of "Valid Address," the date the address was entered, and a green check mark icon will display below the address fields.
- If a validated address is linked to other providers and/or group practices, then all linked records will display the same address validation status.
- Rural Route addresses must be entered in the following format: "NN RR N" (e.g., an address of "RR 2 Box 152" would be entered "152 RR 2" in the Address line 1 field).
- Grid view will not offer address suggestions; however, it will display the relevant icons (e.g., green check mark icon, blue information icon, or red warning icon).
- The address validation status and date fields can be painted or selected to include in queries.
- Each address in the database will display one of the following three statuses: "Valid Address," "Address not checked," or "Not a valid address."
Valid Address: This status means that a user has selected a suggested address (applies to Address line 1, City, State, Zip).

Address not checked: This status means the address has not been validated through address validation.

Not a valid address: This status means an address was entered without accepting an address suggestion.

Note

You are not forced to use the addresses suggested by the validation service; however, addresses entered without selecting an address suggestion will display a status of "Not a valid address," the date the address was entered, and a red warning icon below the address fields. An existing address will display a status of "Address not checked," a blank validation date, and a blue information icon until a user updates the existing address (at which time the status and accompanying date will be updated as well).

Create an affiliation record

Provider affiliation records are used to track a provider's affiliations, such as a medical staff or an academic appointment. It can also be used to record a provider's work history and membership in a

professional society. To create an affiliation record, complete the following steps.

1. Open the **Affiliations References Others** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Create a new affiliation record and assign an institution.
 - a. Select one of the following based on your situation.
 - If no affiliation record exists, click **Create a new record**.
 - If pre-existing affiliation records exist, on the [Toolbar](#) (on page 19), click **New**.
 - Alternatively, in the **Affiliation/References/Other** form, click **Find**.
 - b. In **Select Institution**, find and select an institution. (See [Find \(Select\) Modal](#) (on page 114))
 - The institution address information is automatically populated with information from the institution record, and you are returned to the **Affiliations References Others** form.
3. In the **Affiliation** section, complete any of the following substeps.
 - a. In the **Type** list, select the affiliation type, such as "Medical Staff."

Note

Selecting a **Type** when creating an affiliation record ensures the record is easily recognized within an application query or report.

- b. In the **Relationship** list, select the provider's relationship to the affiliation, such as "Hospital."
 - c. In the **Dept./Specialty** list, select the department or specialty practiced at the affiliation, such as "Internal Medicine."
 - d. In the **Start** box, enter the date the affiliation began.
 - e. In the **End** box, enter the date the affiliation ended. If the affiliation is current, leave the **End** box blank.
 - f. If the affiliation should be verified each time the provider is credentialed, ensure the **Persistent Verification** check box is selected.
 - g. In the **Category** list, select the provider's designated category at the affiliation.
 - h. In the **Fee** box, enter the appropriate fee information, if applicable.
 - i. Click **Info**  and type any additional notes concerning the affiliation record.
4. In the **Contact** section, type the appropriate contact information of the affiliation.
5. Optional. If your organization tracks additional information about the affiliation record enter the required information in the **User Defined** section.
6. Click **Save**.

Create an alternate provider record

Alternate provider records are used to maintain information associated with a provider's alternate coverage arrangements in the event that the provider is unable to perform their duties. To create an alternate provider record, complete the following steps.

Prerequisite

Providers serving as alternates must have an existing provider record in the application.

1. Open the **Alternate Providers** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Create a new alternate providers record and assign an institution.
 - a. Select one of the following based on your situation.
 - If no alternate provider records exist, click **Create a new record**.
 - If pre-existing alternate provider records exist, on the [Toolbar](#) (on page 19), click **New**.
 - b. In **Select Provider**, find and find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
3. In the **Alternate Provider** section complete any of the following substeps.
 - In **Type**, select the specific type of alternate coverage provided, such as emergency or sponsor.
 - In **From**, enter the date when the alternate's coverage arrangement began.
 - In **To**, enter the end date of the alternate's coverage arrangement.
 - Click **Notes**  and type any additional notes concerning the alternate provider.
4. Optional. To view additional address details, in the **Alternate Provider's Addresses** section grid, select the address, then click View Details .
5. Optional. If your organization tracks additional information about the alternate provider record, enter the required information in the **User Defined** section.
6. Click **Save**.

Create a providers area of interest record

Provider areas of interest records can be used for a variety of things, though they are most commonly used to track an area of interest within a provider's specialty.

Example

An orthopedic surgeon may have an area of interest in hip replacement surgery. The provider is qualified to do other procedures, but specializes in this area within the context of their specialty.

To create an area of interest record, complete the following steps.

1. Open the **Provider Areas of Interest** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. In the **Areas of Interest** section grid, click **Add** .
3. In the **Area of Interest** grid, complete any of the following substeps.
 - a. In the **Area of Interest** column, select an area of interest from the list.
 - b. In the **Start Date** column, enter the date the area of interest began.
 - c. In the **End Date** column, enter the date the area of interest ended. If the area of interest is current, leave the **End Date** blank.
 - d. If the area of interest is currently "active," in the **Active** column, select the check box.
 - e. If you utilize symplr Provider web products to display provider information entered into symplr Provider, in the **Record Security** column, select the appropriate display value for the provider's area of interest information, such as "Public Record," from the list.
4. Optional. If your organization tracks additional information about the area of interest record, enter the required information in the **User Defined** section.
5. Click **Save**.

Assignment records

Provider assignment records may be used in several ways. In a hospital environment, the assignment record may be used to track departments or fields of medicine in which a provider is qualified to practice. In a managed care environment, the assignment record may be used to track contracts or products.

If your database is set up to credential by assignment instead of by entity, many of the date and list boxes will auto-fill upon completion of the provider's credentialing process within the application. Please consult your application system administrator to determine what sections of the assignment form need to be filled out prior to completing the steps for creating an assignment record.

Tip

If you can't find the **Assignments** form, it may have been renamed, for example to "Departments" or "Contracts" to better fit your organization's processes. Consult your application system administrator to verify the correct form prior to creating the assignment record.

Create an assignment record

To create an assignment record, complete the following steps.

1. Open the assignment record form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. If the provider already has a provider health record in the system, on the [Toolbar](#) (on page 19), click **New**; otherwise, click the **Create a new record** link.
3. In the **Assignments** section and complete any of the following substeps.
 - a. In **Assignment**, select one or more options from the list.
 - Depending on your organization's form usage, the list may include the department, practice area, contract, or product.
 - Selecting an **Assignment** type when creating an assignment record ensures the record is easily recognized within a query or report.
 - For each option you select in the list, you will create a separate new assignment record.

Note

The **Entity** box will pre-populate with the entity that corresponds to the assignment selected.

- b. In **From**, enter the assignment start date.
- c. In **To**, enter the assignment end date.
- d. In **Status**, select the status of the provider's assignment, such as "Current" or "Contracted."
- e. In **As Of**, enter the date the status began or changed.

- f. In **Category**, select the provider's assignment category, such as "Active" or "Consulting."
 - g. In **As Of**, enter the date the category began or changed.
 - h. In **Term. Reason**, select the reason the assignment was terminated, such as "Performance" or "Contract not renewed."
 - i. In **Termination Date**, enter the date the termination occurred.
 - j. In **ID**, type the ID associated with the specific assignment, if applicable.
 - k. In **Original Date**, enter the date the provider entered into the department, practice area, or contract.
 - l. In **Network**, select the network to which the provider is assigned.
 - m. In **Deleg. Status**, indicate the appropriate status, such as "delegated," if the provider has authorized their application process to be managed by a delegate (hospital), or if credentialing functions have been delegated to another organization, institution, service company (managed care).
 - n. In **Designation**, select the designation of the assignment in relation to the provider, such as "Primary."
4. In the **Other** section, complete any of the following steps as they apply.
- a. In **Date Entered**, enter the date the information was entered into the system.
 - b. In the **Cred. Cycle** list, select the appropriate cycle information. Some usage examples include the following:
 - If the **Assignments** form is used by a hospital or CVO, the provider's credentialing/reappointment cycles, such as January - odd year or January - even year, may be tracked here.
 - If the **Assignments** form is used to track managed care plans, this list could be used by the physician practice management user to track the credentialing cycle, or used by the managed care company to track the cycles of their providers by the plan assignment.
 - c. Click **Medical Director Notes**  and type any notes from the Medical Director regarding the assignment record.
 - d. Click **Information**  and type any notes concerning the assignment record.
 - e. In **Title**, type the title held by the provider in relation to the assignment, if applicable.

5. Optional. In the **Assignment Addresses** section, in the grid, click **Add Row**  and complete the following substeps.

Tip

The system will alert you if there are no available addresses for the provider. To remedy this, [Create a provider address record](#) (on page 199), then reopen the assignment form and retry this step.

- a. In the **Select Provider Addresses** grid, select one or more addresses, then click **OK**.
 - b. In the **Assignment Addresses** grid, in the **Address Type** column, select a type, such as "Primary" or "Billing," from the list.
 - c. In the **Contracted** column, select the check box, if applicable.
 - d. In the **Contract ID** column, type the contract ID, if applicable.
 - e. If your organization requires you to track additional information about the assignment address enter the required information in the **User Defined** section.
6. Optional. In the **Assignment Specialties** section, in the grid, click **Add Row**  and complete the following substeps.

Tip

The system will alert you if there are no available addresses for the provider. To remedy this, [Create a Provider Specialties / Board record](#), then reopen the assignment form and retry this step.

- a. In **Select Provider Specialties / Boards**, select one or more clinical specialties associated with the assignment record, then click **OK**.
- b. In the **Assignment Specialties** grid, in the **Specialty Status** column, select a status from the list.
- c. In the in the **Specialty Type** column, select a type from the list.
- d. If your organization requires you to track additional information about the assignment specialty, enter the required information in the **User Defined** section.

Note

If you add Assignment Specialties or Boards and also add a record to F: Specialities/Boards, you will need to refresh your browser (or logoff and back in) to see your changes.

7. Optional. In the **Additional IDs** section grid, click **Add Row** (+) and complete the following substeps. If not included in the existing columns, enter the required information in the user-defined grid columns. A new ID row appears in the grid. The new row is marked **Active** by default.
 - a. In the **Additional IDs** grid, in the **ID** column, type the identification number/code associated with the assignment record.
 - b. In the **Type** column, select a type from the list.
 - c. In the **Start Date** column, enter a start date for the ID.
 - d. In the **End Date** column, enter an end date for the ID.
 - e. If your organization tracks additional information about the assignment ID, enter the required information in the **User Defined** section.
8. Optional. If your organization tracks additional information about the assignment record, enter the required information in the **User Defined** section.
9. Click **Save**.

Create an education record

Provider education records are used to track a provider's education and training experiences, such as an internship, residency, or fellowship. To create an education record, complete the following steps.

1. Open the **Education** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Create a new education record and assign an institution.
 - If no education records exist, click **Create a new record**.
 - If pre-existing education records exist, on the [Toolbar](#) (on page 19), click **New**.
 - Alternatively, in the **Education** form **Institution** section, click **Find** to select an institution. (See [Find \(Select\) Modal](#) (on page 114))
3. In the **Education** section, complete any of the following substeps.
 - a. In **Program**, select the type of educational program, such as "Medical School."

Note

Selecting a **Program** ensures the record is easily recognized within a query or report.

- b. In **Dept/Specialty**, select the department or specialty studied at the educational institution, such as "Internal Medicine."
- c. In **Start**, enter the date the education or training began.
- d. In **End**, enter the date the education or training ended. If the education or training is current, leave the **End** date blank.
- e. If the education record should be verified each time the provider is credentialed, ensure the **Persistent Verification** is selected.

- f. If the provider has graduated or completed the education or training, select the **Graduate/Complete**.
 - g. Click **Info**  and type any additional notes concerning the education record.
 - h. If applicable, in **Degree**, select the provider's degree obtained from the education or training, such as "MD."
4. In the **Other** section, complete any of the following steps as they apply.
 - a. In **Faculty Title**, select the title of the provider at the educational institution, such as "Graduate Research Assistant."
 - b. In **Certificate #**, type the number of the certificate obtained at the educational institution.
 - c. In **Class Count**, enter the number of students in the graduating class.
 - d. In **Class Rank** and **Class Percentile**, enter the provider's rank and percentile within the graduating class.
5. In the **Education Contact** section, type the appropriate contact information of the educational institution, such as the registrar's contact information, that may be referenced when credentialing the provider.
6. Optional. If your organization tracks additional information about the education record, enter the required information in the **User Defined** section.
7. Click **Save**.

Create a health record

Provider health records are used to track a provider's health status. These records may include drug screenings, flu shots, and vaccinations. To create a health record, complete the following steps.

1. Open the **Health** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Create a new health record and assign an institution.
 - If no health record exists, click **Create a new record**.
 - If pre-existing education records exist, on the [Toolbar](#) (on page 19), click **New**.
3. In the **Health** section complete any of the following substeps.
 - a. In **Screening Type**, select the type of screening, such as a flu vaccination, etc.
 - b. In **Screening Date**, enter the date the screening took place.
 - c. In **Next Screening**, enter the next scheduled screening date.
 - d. Under **Results**, select the appropriate option.
 - e. Click **Comments**  and type any additional notes concerning the provider health record.
4. Optional. If your organization tracks additional information about the provider health record, enter the required information in the **User Defined** section.
5. Click **Save**.

Create an insurance record

Provider insurance records are used to track a provider's professional liability insurance. To create an insurance record, complete the following steps.

1. Open the **Insurance** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Create a new insurance record and assign an institution.
 - If no insurance record exists, click the **Create a new record**.
 - If pre-existing insurance records exist, on the [Toolbar](#) (on page 19), click **New**.
 - Alternatively, in the **Insurance** form **Policy** section, click **Find**.
3. In **Find Institution**, find and select an institution. (See [Find \(Select\) Modal](#) (on page 114))
4. In the **Policy** section, complete any of the following substeps.
 - a. In **Coverage Type**, select the type of educational program, such as "Claims" or "General Liability."

Note

Selecting a **Coverage Type** when creating an insurance record is very important. Doing so ensures the record is easily recognized within a symplr Provider query or report.

- b. In **Policy #**, type the number associated with the insurance policy.
- c. In **Effective**, enter the date the policy began.
- d. In **Retroactive**, enter the retroactive date of the policy.
- e. In **Expiration**, enter the date the policy expires.

Note

If the expiration date entered is prior to the current date, a Warning dialog box will appear asking if you would like symplr Provider to set this record to Inactive. If you select **Yes**, the insurance record will be inactivated.

- f. If the insurance record should be verified each time the provider is credentialed, ensure the **Persistent Verification** is selected.
5. In the **Limits** section, complete any of the following substeps.
 - a. Under **Primary Limit (in millions)**, in **Per Claim** and **Aggregate**, enter the primary limits as indicated in the policy.
 - b. Under **Excess Limit (in millions)**, in **Per Claim** and **Aggregate**, enter the excess limits as indicated in the policy.
 6. In the **Other** section, complete any of the following steps as they apply.
 - a. In **Carrier**, type the name of the insurance provider/carrier.
 - b. In **Agent**, type the agent or writer of the policy.

- c. In **Class**, type any additional information that may further expand upon the coverage type, if desired.
 - d. If there is a privilege limitation indicated in the policy, select the **Privilege Limitation**.
 - e. Click **Limitation Info**  and type any notes concerning the insurance coverage limits.
 - f. In **Specialty**, select the specialty under which the insurance is rated, such as "Internal Medicine."
7. In the **Insurance Contact** section, type the appropriate contact information of the insurance institution that may be referenced when credentialing the provider.
 8. Optional. If your organization tracks additional information about the insurance record, enter the required information in the **User Defined** section.
 9. Click **Save**.

Create a license record

Provider license records are used to track a provider's license and certification data, including state, DEA, state narcotics agencies, lifesaving certificates, and certificates received from national organizations. To create a license record, complete the following steps.

1. Open the **Licenses** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Create a new license record and assign an institution.
 - a. Select one of the following based on your situation.
 - If no license record exists, click **Create a new record**.
 - If pre-existing license records exist, on the [Toolbar](#) (on page 19), click **New**.
 - Alternatively, in the **Licenses** form, on the **License** tab **Institution** section, click **Find**.
 - b. In **Select Institution**, find and select an institution. (See [Find \(Select\) Modal](#) (on page 114))
 - The institution address information is automatically populated with information from the institution record, and you are returned to the **Affiliations References Others** form.
3. In the **License** section, complete any of the following substeps.
 - a. In **Type**, select the type of license or certificate.

Note

Selecting a **Type** when creating a license record ensures the record is easily recognized within a symplr Provider query or report.

- b. In **Status**, select the current status of the license or certificate, such as "Current" or "Temporary."
- c. In **State**, type the two-character postal abbreviation for the issuing state.
- d. In **Issued**, enter the date the license or certificate was issued.

- e. Click **Info**  and type any additional notes concerning the license record.
 - f. In **Expiration**, enter the date the license or certificate expires.
 - g. If the license record should be submitted to the NPDB as part of the credentialing process, ensure the **Submit to NPDB** is selected.
 - symplr Provider automatically selects this option when the license type is designated as "State License" or "DEA Certificate."
 - h. If the license record should be verified each time the provider is credentialed, ensure the **Persistent Verification** is selected.
 - i. In **Number**, type the number associated with the license or certificate.
 - j. In **Field of Licensure**, select the FOL that corresponds to the license.
 - k. In **CAQH Type**, select the CAQH type that corresponds to the license, if applicable.
 - l. To verify the license, click the blue globe  next to the State field.
 - You will be directed to the default verification site for the license type, such as DEA or NPDB, unless otherwise configured by your administrator.
4. Optional. If the license record being created is a DEA certificate, in the **DEA Schedule** section, indicate the schedule(s) that apply by selecting the corresponding check boxes.
 5. In the **Contact** section, type the appropriate contact information of the license institution that may be referenced when credentialing the provider.
 6. Optional. If your organization uses our License Monitor Viewer, in the **License Monitor Viewer Enrollment & Status** section, you will see information applicable to the license record. These fields are read-only and may not be edited.
- Note**
The **License Monitor Viewer** tab of the **Licenses** form displays all records related to the selected provider's License Monitor Viewer monitoring activity.
7. Optional. If your organization tracks additional information about the license record, enter the required information in the **User Defined** section.
 8. Click **Save**.

Create a specialty or boards record

Provider specialty records are used to track the specialties held by a provider. Board records are used to track a provider's board certification information. These two record types are combined into a single form. To create a specialty or board record, complete the following steps.

1. Open the **Specialty/Boards** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))

Specialty Records

1. In the **Specialties/Boards** form in the **Specialties** section, click Add Row (+).
2. In **Add Provider Specialties**, select one or more specialties, then click **OK**.
 - The specialty appears in the grid.
 - If previously associated with the selected specialty by your symplr Provider system administrator, the **Taxonomy Code**, **CAQH Code**, and **Entity Name** columns may also auto-populate with information.
3. In the **Specialties** grid, complete any of the following substeps.
 - a. In the **Status** column, select the appropriate status of the specialty, such as "Board Certified," from the list.
 - b. In the **Type** column, select the appropriate the value, such as "Primary," from the list.

Note

Selecting a **Type** when creating a specialty record ensures the record is easily recognized within a symplr Provider query or report.

- c. If the specialty is currently active, in the **Active** column, select the check box.
 - d. If you utilize symplr Provider web products to display provider information entered into symplr Provider, in the **Record Security** column, select the appropriate display value for the provider's specialty information, such as "Public Record," from the list.
4. Optional. If your organization requires you to track additional information about the specialty record enter the required information in the **User Defined** section.
 5. Click **Save**.

Boards Records

1. In the **Specialties/Boards** form in the **Boards** section, click Add Row (+).
2.
 - a. In **Add Provider Boards**, select one or more boards, then click **OK**.
 - The board appears in the **Boards** grid.
 - If previously associated with the selected specialty by your application system administrator, the **CAQH Code** and **Entity Name** columns may also auto-populate with information.
3. In the **Boards** grid, complete any of the following substeps.
 - a. In the **Board Status** column, select the appropriate value, such as "Certified" or "Eligible," from the list.
 - b. In the **Awarded** column, enter the date the board was awarded.
 - c. In the **Expiration** column, enter the date the board is due to expire.
 - d. In the **Recertification** column, enter the date the board is due to be recertified.

- e. In the **Reverification** column, enter the date the board was last verified by the organization for which the provider practices.
 - f. In the **Meets MOC Req.** column, select the appropriate value, such as "Yes - Meeting ABMS MOC Requirements," from the list.
 - g. In the **Cert. No.** column, enter the certification number.
 - h. If lifetime certification applies to the board, in the **Lifetime Cert.** column, select the check box.
 - i. If the board should be verified each time the provider is credentialed, in the **Persistent Verif.** column, select the check box.
 - j. If you utilize symplr Provider web products to display provider information entered into symplr Provider, in the **Record Security** column, select the appropriate display value for the provider's board information, such as "Public Record," from the list.
4. Optional. If your organization tracks additional information about board records, enter the required information in the **User Defined** section.
 5. Click **Save**.

Inactivate a record

You can inactivate a record by opening the relevant form for the provider, then deselecting the Active check box. To inactivate a record, complete the following steps.

Prerequisite

You must have the required security rights to perform this procedure.

1. Open the form containing the record type you wish to inactivate, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. In list view or on the [Toolbar](#) (on page 19) record navigation , locate the record you want to inactivate.
3. Deselect the **Active** check box for the record to inactivate.
4. Click **Save**.

Delete a record

To delete a record, complete the following steps.

Prerequisite

You must have the required security rights to perform this procedure.

Note

To maintain data integrity, symplr recommends you inactivate a record instead of deleting it.

1. Open the form containing the record type you wish to delete, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. In list view or on the [Toolbar](#) (on page 19) record navigation  locate the record you want to delete.
3. On the [Toolbar](#) (on page 19), click **Delete**.
4. To confirm deletion, click **Yes**.
5. Click **Save**.

Working with symlr Provider

As you work with symlr Provider, you will often work with different work items at the same time. In this section, the topics are arranged by areas of interest, such as provider management or credentialing, rather than by work item type.

Section	Description
ABMS (on the next page)	Connect to ABMS data services and work with ABMS data.
Actions, Claims, and Suspensions (on page 153)	Keep track of administrative or adverse decisions against health care providers, including privilege revocation, malpractice claims, and suspensions.
Auditing (on page 156)	Track and review changes made to specific fields, records, and forms in symlr Provider.
Contact log (on page 156)	Maintain a record of all contact-related communications with an existing provider and track communication between your organization and potential recruits.
Credentialing (on page 159)	Gather, validate, and assess the qualifications of a health care practitioner to provide patient care services in or for your health care organization.
Manage external plans (on page 169)	Typically used by hospitals to list the Payers and Products in which providers participate. Record information regarding a provider's participation in various types of plans.
Institutions (on page 170)	Maintain the institution detail records referenced throughout symlr Provider.
NPDB (on page 172)	Request reports from the NPDB regarding specific providers using queries to find information about medical malpractice matters.
The OIG (on page 180)	Compare the OIG List of Excluded Individuals/Entities (LEIE) database to your provider information stored in symlr Provider. Create an action report.
Privileges (on page 183)	Assign privileges to a provider, mass update privileges, roll privileges forward upon re-appointing a provider, and edit or inactivate a provider's existing privileges.
Provider activity (on page 191)	Create and manage providers and events for CME committees and meetings. Contact committee members or event participants via email.
Provider addresses (on page 199)	Track all individual provider address records and any additional address-specific data such as additional IDs, limitations, and specialties. Create group practice records. Validate addresses in the US and Puerto Rico.

Section	Description
Provider questions (on page 204)	Create a variety of provider questions and input data based on the responses. Use these in general surveys or customized forms. Record, score, and associate responses with specific providers. Generate documents and reports from the responses.
Provider summary (on page 208)	Displays a provider's professional and biographical information as a quick reference. Allows you to quickly view the available record types for a selected provider in one form.
Reviews (on page 209)	Build multiple review question sets for medical records, peer reviews, and site reviews. Generate documents and reports on the responses.

ABMS

The ABMS Direct Connect *Select*™ data service receives data directly from the American Board of Medical Specialties (ABMS). This data contains board certification information, including certification effective and expiration dates, as well as Maintenance of Certification (MOC) information.

Configure an ABMS account

Before providers can be submitted to ABMS Direct Connect *Select*™ through symplr Provider, an account must be configured via the ABMS Account Setup form. To configure an ABMS account, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to configure an ABMS account.

1. [Search for an item](#) (on page 18).
2. In the **ABMS Account Setup** form, in the **ABMS Account Information** section, enter the Description, Account Name, ABMS ID, User Name and Password (provided by ABMS Direct Connect *Select*™) in the fields provided. If you require assistance setting up the ABMS account, please contact symplr support at support@symplr.com.
3. Optional. To create a new credentialing instance record when a returned ABMS report is used to update a provider record in symplr Provider, select the **Create new Credentialing Instance Records** check box.
4. Click **Save**.

Update and map ABMS values

When provider reports are returned from ABMS Direct Connect *Select*™, information associated with the provider may not correspond to ABMS values currently available in symplr Provider. This can result in duplicate values being added to your database.

Example

The provider's board description in symplr Provider may be "Anesthesiology," while the board description returned from ABMS may be "American Board of Anesthesiology." Though both descriptions have the same meaning, they would be considered two different board values and a new entry to the symplr Provider board table would be added.

To minimize the chance of duplicate values being added to symplr Provider, values may be mapped in the ABMS - Reftable Mapper.

Update ABMS values

Before mapping ABMS values, ensure the values in your symplr Provider database are current. To update your database with the latest ABMS values, complete the following steps.

1. Open the **ABMS - Reftable Mapper** form, then click **Download Latest Master Values**.
2. In **Master Updates** click **Yes**.
 - A message appears at the top of the window indicating the download results.

Select table and map values

Once you have downloaded the latest master values from ABMS, you select the table and record view to update, then map your local values to the master values.

1. Near the top of the form in **Reftable**, select the table to update.
2. Optional. To display only unmapped values, verify that **Only display unmapped values** is selected.
 - To display all values, deselect **Only display unmapped values**.
3. To map a value using existing values, for each row in the grid, select an entry from the **Local Value** list.
4. To create a new local value complete the following substeps.
 - a. From the Local Value list, select **[New Reftable Entry]**.
 - b. In **Create Reftable Entry**, enter a **Short Description** and a **Description**, then click **OK**.
5. When done mapping values, click **Save**.

Actions, Claims, and Suspensions

Keep track of administrative or adverse decisions against health care providers, including privilege revocation, malpractice claims, and suspensions.

Actions

An action can be administrative or adverse decisions taken against a health care provider by an authoritative body. An example of an administrative action is when a provider has allowed a brief lapse in licensure and is suspended from practicing. An example of an adverse action is when a provider's clinical privileges are revoked following a 30-day summary suspension. In symplr Provider, the Actions form is used to record any actions related to professional competency for a provider.

Malpractice claims

The National Practitioner Data Bank (NPDB) defines a medical malpractice action or claim as "a written complaint or claim demanding payment based on a health care practitioner's provision of or failure to provide health care services, and includes the filing of a cause of action based on the law of tort, brought in any state or federal court or other adjudicative body."¹

The Malpractice Claims form is used to record the malpractice claims history for a provider and contains boxes necessary to record claims payment information reported to or received from the NPDB.

The form is also used to record unpaid claims filed against a provider, or those claims not resulting in payment. These claims may have been reported by the provider or received from other sources, such as insurance companies, as part of the credentialing or re-credentialing process.

Medical record suspensions

As the primary source of a patient's treatment and care, the medical record must be consistent with standards, complete, accurate, and truthful. Medical records reviews are routinely conducted to identify deviation from standard requirements for information and/or standard of care contained in patient records.

If medical records are found to be incomplete or delinquent, an organization may suspend a provider's privileges until the records are deemed complete. In symplr Provider, the Medical Record Suspensions form is used to record and report the suspensions of medical staff privileges and other actions, such as incomplete or overdue medical records.

¹Source: U.S. Department of Health and Human Services, Health Resources and Services Administration. NPDB Guidebook. Rockville, Maryland: U.S. Department of Health and Human Services, 2015.

Create an action record

To create an action record, complete the following steps.

1. To create an action record for a provider, complete the following steps, depending on the situation.

Situation	Steps
From the Actions form	<ol style="list-style-type: none"> 1. Open the Actions form, then find and select a provider. (See Find (Select) Modal (on page 114))
From the OIG - Manager form	<p>After running the OIG sweep, in the appropriate grid in the Results section, click Add provider action  next to the provider's name.</p> <ul style="list-style-type: none"> • The Actions form opens with the Action, Action Date, Report Source, and Source Statement boxes already populated with information from the OIG.

2. To create a new action record select one of the following.
 - If no action record exists, click **Create a new record**.
 - If pre-existing action records exist, on the [Toolbar](#) (on page 19), click **New**.
3. To associate an action to the institution where it took place, in the **Institution** section click **Find** to select an institution.
4. To associate an action to the institution that reported it, in the **Reporting Institution** section click **Find** to select an institution.
5. In the remaining sections (**Action**, **Report Source**, and **Provider Statement**, **Other**, and **User Defined**) complete any of the appropriate information for the situation.
6. Click **Save**.

Create a malpractice claim record

To create a malpractice claim record, complete the following steps.

1. Open the **Malpractice Claims** form and [Find \(Select\) Modal](#) (on page 114).
2. Create a new malpractice claim record by selecting one of the following.
 - If no claim record exists, click **Create a new record**.
 - If pre-existing claim records exist, on the [Toolbar](#) (on page 19), click **New**.
3. To associate a claim to the institution where the malpractice took place, in the **Institution** section click **Find**, then find and select an institution.
4. To associate a claim to the institution that reported it, in the **Reporting Institution** section click **Find**, then find and select an institution.

Tip

In some cases, the institution where the malpractice took place is the same as the reporting institution.

1. In the **Action / Omission** section complete any of the fields that are relevant to the case.
 - The reference ID is the internal or external ID number used to reference the claim
2. In the **Case/Venue** section complete any of the fields that are relevant to the case.
 - The Patient Relationship is the relationship of the individual who reported the incident.
 - The Adjudicative Body is the review board.
3. In the **Payment** section complete any of the fields that are relevant to the case.
 - The Payment Result indicates how the payment was determined, such as the result of a judgement or a settlement.
4. In the **Provider Statement** section complete any of the fields that are relevant to the case.
5. In the **Report Source** section complete any of the following substeps.
6. Optional. To view an NPDB reports returned on the provider, in the **NPDB Reports** section grid, click **Download** .
 - The report will be delivered to your inbox for download to your local machine.
7. Optional. If your organization tracks additional information about the malpractice claim, enter the required information in the **User Defined** section.
8. Click **Save**.

Create a medical record suspension record

To create a medical record suspension record, complete the following steps.

1. Open the **Medical Record Suspensions** form and **Find (Select) Modal** (on page 114).
2. Create a new medical record suspension record.
 - If no medical record suspensions records exist, click **Create a new record**.
 - If pre-existing medical record suspensions records exist, on the **Toolbar** (on page 19), click **New**.
3. In the **Medical Record Suspensions** form, in the **Suspension** section, complete any of the following substeps.
 - a. In **Type**, select the type of suspension, such as formal disciplinary hearing, reprimand, etc.
 - b. In **Start**, enter the date the suspension began.
 - c. In **End**, enter the date the suspension was resolved.
 - d. In **Charts Over Due**, type the number of medical charts overdue.
 - e. In **Incomplete For Billing**, type the number of medical charts incomplete for billing.
 - f. Click **Notes**  and type any additional notes concerning the medical record suspension.
4. Optional. If your organization tracks additional information about the medial record suspension, enter the required information in the **User Defined** section.
5. Click **Save**.

Auditing

symplr Provider provides auditing functionality that allows you to track all entries, updates, and deletions made to a specific field, record, or form in symplr Provider. Auditing keeps track of what was changed, who made the change, and when the change occurred. Auditing can be set at the field, form, or record level. The Audit Log Viewer displays changes made to a specific field, record, or form.

Note

The level of auditing recorded within symplr Provider is determined by your system administrator. The level of auditing recorded within Cactus is determined by your system administrator. The system administrator can choose to track audit information at the record level, field level, or not at all using the **Files - Master Setup** system form.

View audit log for a field, record or form

To open the audit log viewer to access the audit log for a field, record, or form, complete the following steps.

Prerequisite

You must have the required security rights to perform this procedure.

1. Open a form.
2. From the [Toolbar](#) (on page 19), select **More > Field Action**.
3. Next to the field to view, click , then select **Audit Log**.
4. To narrow your search selection, select one of the following filter options.
 - **All File Records** - returns audit information for all records associated with the form.
 - **Focus Record Only** - returns audit information about the current record.
 - **Focus Field Only** - returns audit information about the field selected.
5. To view details about an audit entry, select a row in the grid, then click **View Details** .

Tip

As with any grid, you can filter the results by field and rearrange the field order. (See [Grids](#) (on page 120))

Contact log

In symplr Provider, the Contact Log form enables you to maintain a record of all contact-related communications with an existing provider. The form can also be used to track communication between your organization and potential recruits.

In list view, uncompleted items are listed first. Completed items are read-only, and display a padlock icon in the Completed column.

Tip

To edit a completed item, switch to detail view.

After a contact record has been logged and saved, it will be accessible as a task in the Tasks hub, or from within the Task viewer of the Contact Log form. If necessary, reminders can be set up to alert symplr Provider users of any outstanding tasks associated with a contact record.

Create a Contact Log record

To create a Contact Log record, complete the following steps.

1. Open the **Contact Log** form.
2. In the **Find Provider**, find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
3. If the provider already has a Contact Log record in symplr Provider, on the [Toolbar](#) (on page 19), click **New**; otherwise, click the **Create a new record** link.
4. In the **Contact Log** form, expand the **Details** section and complete any of the following substeps.

Note

The **Created By** box will auto-populate with your user information. The **Created On** date and time boxes will auto-populate when the Contact Log record is saved.

- In **Subject**, type the subject of the communication.
 - In **Details**, type any notes pertaining to the communication.
 - In **Type**, select the type of communication, such as initial call, follow-up, etc.
 - In **Method**, select the method of contact, such as phone, email, etc.
5. Expand the **Related Task** section and complete any of the following substeps.
 - In **Assigned To**, select the user for which the task should be assigned. The **Assigned On** date and time boxes auto-populate.
 - In **Priority**, select the priority level of the communication, such as high, medium, or low.
 - In **Due Date**, enter the date and time the task is due for completion.
 - To generate a reminder for the task, select **Reminder**, then enter the date and time for the reminder to occur.

Note

The reminder appears in a pop-up dialog box to the user for which it is assigned, and on the date and time specified in the **Related Task** section.

- Optional. To email the provider directly from the **Contact Log** form, expand the **Provider Information** section and, in the **Email** box, click the **Email** .

Note

To enable email functionality, the provider's email address must be populated in the **Email** box of the **Providers** form.

- Optional. If your organization requires you to track additional information in the **Contact Log** form that does not apply to any existing sections sympplr Provider provides, in the **User Defined** section, enter the required information.
- Click **Save**.

Tip

When you complete and save a contact log entry, it becomes read-only. In list view completed records show a padlock and a checkmark   in the Completed column to indicate a completed (read-only) entry.

Complete a contact log task

To complete a Contact Log task, complete the following steps.

- To complete a Contact Log task, open the **Task Detail** form using one of the following methods.

Situation	Steps
From the Tasks hub	<ol style="list-style-type: none"> Open the Tasks hub. Click Edit this task  to open the Task Detail form.
From the Contact Log form	<ol style="list-style-type: none"> Open the Contact Log form. In the Find Provider, find and select a provider. (See Find (Select) Modal (on page 114)) In the toolbar, click Tasks. In the task viewer, double click the task to edit. Click Edit.
From the Task Reminder dialog box	<ol style="list-style-type: none"> In Reminder, from the Actions menu  for the task, select Open.

- Optional. To forward the task to a different sympplr Provider user, see [Forward a task](#) (on page 85).
- Optional. In the **Task** section, complete one or more of the following steps.
 - In **Details**, type the applicable notes.

Tip

You can resize the details field to fit your content.

- In **Status**, select an appropriate value, such as "Complete."

4. Optional. If your organization requires you to track additional information in the **Contact Log** form that does not apply to any existing sections symplr Provider provides, in the **User Defined** section, enter the required information.
5. When you have completed your changes, in the **Task** section, check **Completed**.
 - The corresponding **Completed** date and time boxes automatically populate.
6. Click **Save**.

Credentialing

Credentialing is the process of gathering, validating, and assessing the qualifications of a health care practitioner to provide patient care services in or for a health care organization. symplr Provider has extensive features to facilitate and record this process.

Completing a credentialing process in symplr Provider typically includes the following steps.

1. Creating a definition for each type of credentialing process.
2. Creating a credentialing instance for either an individual provider or a group of providers.
3. Gathering the necessary provider records and verify the information.
4. Assessing the provider's qualifications and record the assignment of credentials to the provider or group of providers.

Credentialing concepts

The following concepts are essential for understanding credentialing with symplr Provider.

Credentialing instance

A credentialing instance refers to the single occurrence of verifying a provider's credentials.

Credentialing group

A credentialing group is a group of providers who are all being credentialed or re-credentialed at the same time.

Credentialing type

The credentialing type assigned to a credentialing process determines its format and worksheet items.

Snapshot

A snapshot is a record of the status of a verifiable item in a provider's credentialing instance at the moment that item was marked as "verified." The snapshot is an archived read-only record of the item information, the date it was verified, and the symplr Provider user who marked it as verified.

Removing the verified status from the item will discard the snapshot and allow you to edit the record.

Associated activity

An associated activity is used during the credentialing process in a multi-entity symplr Provider system to allow each entity to record entity-specific data related to the credentialing instance.

Credentialing Manager

Use the Credentialing Manager form to update multiple credentialing instances at once. Instances are organized into the following groups to assist you in locating the instances you want to update.

- Active credentialing instances or credentialing instances in process
- All credentialing instances with a specific status, such as "Approved" or "Recommended"
- All credentialing instances belonging to a specific credentialing group

Tip

The Credentialing Manager can be opened from Quick Launch, or within some forms, such as Credentialing Group. When opened from Quick Launch, the Find Credentialing Records stepper will help you select the appropriate records.

Credentialing instance

A credentialing instance encompasses all tasks necessary for successful completion of that credentialing process. For example, every two years a separate credentialing instance is created in symplr Provider for a provider's reappointment credentialing process. A credentialing instance may also be created when a provider requests a new privilege mid-cycle.

Open a credentialing instance - Individual

To open an existing credentialing instance for an individual provider, complete the following steps.

1. Open the **Credentialing/Verification** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. In the search results, select the provider, then click **OK**.
3. To create a new Credentialing/Verification record, select one of the following options.
 - If there are no existing records, click **Create a new record**.
 - If there are existing entries, on the [Toolbar](#) (on page 19), click **New**.
4. Select the credentialing instance to open, then click  to view the detail record.

Create a credentialing instance - Individual

To create a new **Credentialing instance** (on the previous page) for an individual provider, complete the following steps.

1. To begin, complete the following steps, depending on the situation.

Situation	Steps
From the Credentialing/Verification form	<ol style="list-style-type: none"> 1. Open the Credentialing/Verification form, then find and select a provider. (See Find (Select) Modal (on page 114)) 2. To create a new Credentialing/Verification record, select one of the following options. <ul style="list-style-type: none"> • If there are no existing records, click Create a new record. • If there are existing entries, on the Toolbar (on page 19), click New.
From the Providers form	<ol style="list-style-type: none"> 1. Open the Providers form of the provider you want to export. 2. Click  to open the Send to menu, select Credentialing Manager, then click OK. 3. Select the desired entities, then click Save.

2. If you are logged in at the corporate entity or a grouping entity in a multi-entity system, and the current entity credentials by Entity Association, the **Select Entity** dialog box appears. Select the entity or entities for which the provider is being credentialed. Click **OK**.
3. In the **New Credentialing Instance** dialog box, click **Yes** to include the verification of each of the listed provider records as part of the provider's credentialing instance, and in the **Create Credentialing Records** dialog box, click **OK**. The new credentialing instance record is created for the provider.
4. On the **Setup** tab, in the **Overview** section, in the **Type** list, select a credentialing type, such as "Initial" or "Reappointment."
5. Optional. On the **Setup** tab, in the **Overview** section, enter any applicable dates, status, or notes in the boxes provided.

Note

Changes to the selected options in the Credentialing Status (**Cred. Status**) and **Assigned To** lists, and the **As of** date field, are tracked in the **Credentialing Status History** and **Assigned To History** section grids. After changes have been made to one or both of the lists and the form has been saved, a new history record appears in the respective grid. Changes also appear when viewing the provider record on the Credentialing Group form, if applicable. The **As of** date field defaults to today's date; however, you may change the date, if desired.

6. Optional. If your organization tracks additional information about the credentialing instance, enter the required information in the **User Defined** section.
7. Click **Save**.

Complete a credentialing instance - individual providers

To complete the credentialing process for a single provider, complete the following steps.

1. Open the **Credentialing/Verification** form, select a provider, then switch to detail view.
2. On the **Verifications** tab, on the **All** sub tab, verify the items listed by sending out the necessary verification documents or contacting the related agencies and boards.
3. To verify an item in the system, click the **Verified** column next to the item in the grid, then select the resulting check box.
 - When you have marked an item as verified, the date field is automatically populated with the current date.
4. Optional. In the **Information Verified** section, edit any of the fields to indicate verification specifics.
 - The **How** list allows you to select the method by which the item was verified.
5. Optional. To add an image to a verification record, click **Attachments**.
 - The **Verifications Attachment Manager** opens as a separate work item.
6. Optional. On the **Worksheet** tab, complete any worksheet items as necessary to complete the credentialing process.
7. Complete an activity by completing the following substeps.
 - a. On the **Activity** tab, in the **Information Upon Credentialing Completion** section, enter the applicable information for the credentialing activity.
 - b. Select **Activity Completed** when the activity is complete.

Note

Depending on how credentialing is configured for the entity, completing the activity may complete the entire credentialing instance and update all provider privileges and entity/assignments as directed by the credentialing instance. This setting is part of the entity configuration.

- c. On the symplr Provider toolbar, click **Save**.
8. Optional. If the credentialing activities are all complete and the credentialing instance has not automatically been marked as complete according to the entity configuration, in the **Credentialing Setup** tab, select the **Credentialing Completed** check box.
 9. Click **Save**.

Credentialing Groups

Forming a credentialing group in symplr Provider is useful in managing and facilitating mass re-credentialing or reappointments.

Creating a credentialing group automatically creates an individual credentialing instance for each member of the group, but also allows you to conduct the credentialing review process for all group members at one time, rather than individually.

Open a credentialing instance - Group

To open an existing credentialing instance for a credentialing group, complete the following steps.

1. Open the [Credentialing Groups](#) (on the previous page) form.
2. In **Find Credentialing Group**, search for and select a credentialing group, then click **OK**.
 - If you do not know the name of the credentialing group, search by the date the group was created or the **Start Date**.
3. Optional. To open and modify the group's credentialing instances or to send the group to another form, complete the following.
 - a. In the **Credentialing Manager**, in the **Credentialing Group Summary** section, click **Open Group in Credentialing Manager**.
 - The Send Key in the Credentialing Group form is only used to paint a query. (See [Create a query](#) (on page 32))

Note
 In order to open and modify the credentialing group in the **Credentialing Manager**, the credentialing group must first be locked. Unlocked instances may still be accessed and updated via the **Credentialing Group** form, if desired.

Create a credentialing group

To create a credentialing group with symplr Provider credentialing instances for multiple providers, complete the following steps.

1. Depending on the situation, complete one of the following procedures to open and populate a **Credentialing Group**. The form opens on the **Summary** tab.

Situation	Steps
From the Credentialing Group form	<ol style="list-style-type: none"> 1. Open the Credentialing Group form. 2. To open a new blank form, in Find Credentialing Group, click New. 3. In the Providers section grid, click Add ⊕. 4. In Add Providers, find and select one or more providers, then click OK.
From the Results tab of a query, or from the following Cactus forms: the Providers , Credentialing/Verification , Credentialing Manager , and Group Practices form	For specific steps, see the Use the Send To feature (on page 103) topic in this user help documentation.

- Optional. In the **Credentialing Group Summary** section **Description**, replace the existing, automatically-populated description, with a description that represents the credentialing process terms used in your organization.

Note

Establishing a system for naming credentialing groups based upon the date the credentialing group was created and its purpose will be helpful when later searching symplr Provider for a specific credentialing group.

- In the **Type** list, select the credentialing type, such as “Initial” or “Reappointment.”
- To display Credentialing/Verification record information for the selected provider, click **expand** , then make any desired changes.

Note

Changes made to the Credentialing/Verification form's Credentialing Status (**Cred. Status**) list and the **As of** date field are tracked in the **Credentialing Status History** section grid of the Credentialing Group form. The **As of** date field defaults to today's date; however, you may change the date, if desired.

- Optional. If your organization requires you to track additional information about the credentialing group that does not apply to any existing sections symplr Provider provides, in the **User Defined** section, enter the required information.
- To prevent further editing, automatically create individual credentialing instances for each provider, and create the worksheet items as established in the **Credentialing Types** reference list, complete the following steps.
 - In the **Credentialing Group Summary** section, select the **Locked** check box, then click **Yes** to confirm your selection.
 - To acknowledge the record creation, click **OK**.
- In **Lock Credentialing Group**, click **OK**.
- Click **Save**.

Manage multi-credentialing instances

The Credentialing Manager form enables you to manage many credentialing instances at once. Use this form to mass update information, such as credentialing dates, statuses, and categories, as well as roll forward provider privileges and complete multiple credentialing instances.

To manage credentialing instances for one or multiple providers, complete the following steps.

1. Open the **Credentialing Manager** form.
2. In **Find Credentialing Records**, select one of the following methods for the type of credentialing instances you want to manage.

- **Active/In Process Credentialing Instances**

- a. Select **Active / In-Process Credentialing Instances**.
- b. Click **OK**

- **Credentialing Instance with a specific Credentialing Status**

- a. Select **Credentialing Instance with a specific Credentialing Status**, then click **Next**.
- b. Select a credentialing status from the drop-down.
- c. Optional. To include completed credentialing instances in your search, click **Include Completed**.
- d. Click **OK**

- **Credentialing Instances in a specific Credentialing Group**

Note

In order to search for and modify a credentialing group using the **Credentialing Manager**, the credentialing group must first be locked. Unlocked instances may still be accessed and updated via the **Credentialing Group** form, if desired.

- a. Select **Credentialing Instances in a specific Credentialing Group**, then click **Next**.
- b. In **Find Credentialing Records**, enter any of the search criteria listed, then click **Search**.
- c. Select a group from the results, then click **OK**.
- d. Click **OK**

- **Custom** (coming soon)

Mass update multiple credentialing instances

1. From list view, Select the items in the grid to be updated. (See [Mass updates and mass actions](#) (on page 103))
2. Click **Actions**, then click **Edit**.
 - This opens the mass update stepper, which walks you through the mass update process. (See [Steppers](#) (on page 118))

3. Complete the following actions in the stepper.
 - a. In step 1, **Setup**, enter the information you want to update in the appropriate fields, then click **Next**.
 - b. In step 2, **Activity**, enter the information you want to update in the appropriate fields, then click **Next**.
 - c. In step 3, **Roll Forward**, select the appropriate roll forward options, then click **Next**.
 - d. In step 4, **Validation**, if the validation is successful, click **Next**. If validation fails, click **Previous** to correct any errors in the stepper, then retry validation.
 - e. In step 5, **Summary**, review the pending changes.
 - i. If the changes are correct, click **OK**.
 - ii. To edit any changes, click **Previous** to return to the steps to correct. Alternatively, you can click the previous step number. When finished, return to step 3 to finish.

Delete a credentialing instance

Credentialing instances can only be deleted when they are selected singly and not tied to a credentialing group.

Tip

If Delete is disabled, verify that you only have one record selected.

To delete a credentialing instance, complete the following.

1. Select a record, then click **Delete**.
2. Repeat the step above for each record to delete.

Update Type field

You can't update **Type** in mass update mode, and it is disabled in the mass update stepper. To update the type field, navigate to the record to update, then switch to Detail view.

Credentialing types

Credentialing types are defined in their respective Credentialing Types reference list record in symplr Provider. For example, you can create a credentialing type for the initial credentialing of a new provider, or the recredentialing of an existing provider.

You can add "questions" to the credentialing type instance to remind users of required tasks. For example, if your organization requires new applicants to pay an application fee, indicate this requirement here. The questions added to the credentialing type will be listed as items on the Worksheet tab of the credentialing instance. You can also create labeled data fields so the user can enter responses to the questions when completing a credentialing instance.

Prerequisite

You must have the required security rights to view and edit the [Credentialing types \(on the previous page\)](#) reference list.

Manage credentialing types

You can create, update, and inactivate credentialing types.

Create a credentialing type

To create a credentialing type, complete the following steps.

1. Open the **Credentialing Types** reference list.
2. To create a new **Credentialing Types** record, select one of the following options.
 - If there are no existing records, click **Create a new record**.
 - If there are existing entries, on the [Toolbar](#) (on page 19), click **New**.
3. In the **Credentialing Types** form, in the **Credentialing Types** section, complete the following substeps.
 - a. In the **Short Description** box, type a short description of the credentialing type, such as "Initial Cred."
 - b. In the **Description** box, type the full description of the credentialing type, such as "Initial Credentialing."

Note

The short description of the credentialing type appears in the credentialing record. The longer description is displayed in the **Type** list with more information to help you select the correct credentialing type when creating a new credentialing instance.

4. [Add questions to the credentialing type](#) (on the next page).
5. Click **Save**.

Update a credentialing type record

To update a credentialing type record, complete the following steps.

1. Open the **Credentialing Types** reference list.
2. In the grid, select the credentialing type record you want to update, then switch to detail view.
3. Select and update the credentialing type record.
4. Click **Save**.

Inactivate a credentialing type record

To inactivate a credentialing type record, complete the following steps.

1. Open the **Credentialing Types** reference list.
2. In the grid, next to the credentialing type record you want to inactivate, deselect **Active**.
3. Click **Save**.

Add questions to the credentialing type

You can add "questions" to the credentialing instance to remind users of required tasks. To add questions to a credentialing type, complete the following steps.

Prerequisite

You must have the required [security rights](#) to view and edit the **Credentialing Types** reference list.

1. Open the **Credentialing Types** reference list and select a credentialing type to which you want to add questions.
2. Toggle to detail view .
3. To add a new question, click **Add** .
4. In **Item**, type a question.
5. In the **Label 1** box, type the label for the response.
6. In **Type 1**, select an option from the list.
 - If the question requires a response that is a choice of one item from a list of options, complete the following substeps.
 - a. In the **Type 1** list, select **Selection List**.
 - b. Click **Add New** in the grid.
 - c. Select the words **New Item 1** and type the first option item into that box.
 - d. To add another option item to the list, repeat the previous substeps.
7. In **Where Displayed**, select one of the following options:
 - **Credentialing Group** - populates the credentialing group form and not the individual provider credentialing instance.
 - **Credentialing/Verification** - populates the individual provider credentialing instance and not on the credentialing group.
 - **Both** - displays the question on the worksheet tab for both credentialing group instances and individual provider credentialing instances. The worksheets will be available on each form, but answers will not be tied together.
8. In the **Entity** list, select the entity to which the credentialing type should be related.
9. To allow users at other entities to view the question in a credentialing instance record, select **Other entities can View**.

10. To allow users at other entities to input a response to the question in the credentialing instance record, , select **Other entities can View & Edit**.
11. To allow users to mark the question as not applicable select **Allow N/A responses**.
12. Optional. Repeat the steps above to add additional questions.
13. Optional. For each question you want to reorder, in the item list, click , then select either **Move to top** or **Move to bottom**.
14. Click **Save**.

Manage external plans

In symplr Provider, the External Plans form is typically used by hospitals to list the Payors and Products in which providers participate. External plan records are used to record information regarding a provider's participation in various types of plans

Note

The External Plans form is not an alternative to an enrollment entity.

Create an external plan record

- . To create an external plan record, complete the following steps.
 1. Open the **External Plans** form, the find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
 2. Create a new external plan record.
 - If no external plan record exists, click **Create a new record**.
 - If pre-existing external plan records exist, on the [Toolbar](#) (on page 19), click **New**.
 3. In the **Institution** section, click **Find**.
 - Because external plans are entered and considered as a type of institution record in symplr Provider, after you have selected the plan, the institution address information is auto-populated with information located in the institution record.
 4. In the **Plan** section, complete any of the following substeps.
 - In **Plan**, select the appropriate plan.
 - In **Provider Type**, select the type of care the provider typically performs for the plan, such as allied health, primary care or specialist.
 - In **Start**, enter the date the provider's participation in the plan began.
 - In **Term.**, enter the date the provider's participation in the plan ended.
 - Click **Provider Info**  and type any additional notes concerning the provider's participation in the plan.

- In **Plan ID**, type the ID given to the provider by the plan.
 - In **Plan Group**, type the Plan Group name provided by the plan.
5. In the **Plan Contact** section, complete any of the following substeps.
 - In **Name**, type the primary contact of the participating plan.
 - In **Email**, type contact's email address.
 - In **Phone**, **Fax**, and **Ext**, type the contact's phone and fax numbers and any extensions.
 6. Optional. If your organization tracks additional information about the external plan, enter the required information in the **User Defined** section.
 7. Click **Save**.

Inactivate an external plan record

To inactivate a provider's External plans record, see [Inactivate a record](#) (on page 148)

Delete an external plan record

To delete a provider's external plan record, see [Delete a record](#) (on page 148).

Institutions

Many forms and records in the application rely on the location, name, and description of a supporting institution as vital information. Instead of requiring you to input this information every time an institution is referenced, symplr Provider allows you to select an institution from an internal dictionary.

This internal institution dictionary contains medical and dental schools, hospitals, boards and other institutions within the United States and throughout the world. Institutions may be added to the internal dictionary by your symplr Provider system administrator and edited as needed.

Manage institution records

You can create, edit, and inactivate institution records.

Create an institution record

If you are unable to locate the [Institutions](#) (above) you need from the symplr Provider internal institution dictionary, you have the option to create a new institution record. To create an institution record, complete the following steps.

Note

If you want to create a new institution record that would contain information similar to an existing institution record, see .

1. To open the **Institutions** form, complete one of the following substeps.

Situation	Steps
Global Search box	<ol style="list-style-type: none"> 1. Search for a form. 2. Under Search Results, click the Institutions link. 3. In Find Institution, click New.
A form	<ol style="list-style-type: none"> 1. Open the form and navigate to the specific record to which the institution will be associated. 2. In the Institution section, click Find. 3. In the Find Institution dialog box, click New.

2. In the **Institutions** form, expand the **Contact Information** section and complete the following substeps.
 - a. In **Name**, type the name of the institution.
 - b. In **Salutation**, type the appropriate phrase or greeting that could be used when addressing the institution, for example, in an affiliation letter.
 - c. In **Contact**, type the name of the general contact for the institution.
 - d. In **Address** and **City/St/Zip**, type the address information for the institution. (See [Working with address validation](#) (on page 134))
 - e. In **Country**, select the country where the institution is located.
 - f. In **ID**, type the ID of the institution, if applicable.
 - g. In **Phone**, **Alt**, **Fax**, **Pager**, and **Ext.**, type the additional contact information for the institution.
 - h. In **Email**, type the general email address for the institution.
 - i. In **Home Page**, type the URL of the institution's website.
 - j. In **Verification URL**, type the URL of the institution's website if needed for credentialing verification purposes.

3. In the **Institutions** form, expand the **Properties** section and complete any of the following substeps.
 - In **Entity**, select the entity
 - In **Facility Type**, select type of institution, such as affiliation, school, or reference.
 - To relate the institution to a specific type of form in symplr Provider, select the corresponding check box. For example, if the institution record is an insurance carrier, select the **Insurance** check box.

- In **Fee**, select the verification fee charged by the institution.
 - Click **Notes**  and type any additional notes about the institution.
 - If the institution is a member of your health system, select the **Member Hospital** check box.
 - If the institution is located within the your city, county, or region, select the **Local** check box.
 - If, for example, you track a number of institutions for a department, you may want to label one as the master institution. To do this, select **Master Institution**.
 - In **AMA Code**, type the code used for tracking American Medical Association data.
 - In **Interface #**, type the interface code used in conjunction with a symplr Provider import/export, if applicable.
 - In **NPI**, type the NPI number of the institution, if applicable.
 - In **CAQH School ID**, type the CAQH School ID, if applicable.
4. Optional. If your organization tracks additional information about the institution, enter the required information in the **User Defined** section.
 5. Click **Save**.

Edit an existing institution record

To edit an existing [Institutions](#) (on page 170) record, complete the following steps.

Warning!

Institution information should be edited with caution. Any changes to an institution record will affect all records to which it is linked.

1. Open the **Institutions** form, the find and select an institution. (See [Find \(Select\) Modal](#) (on page 114))
2. In the **Institutions** form, edit the existing information where appropriate.
3. Click **Save**.

Inactivate an institution record

To inactivate a provider's institution record, see [Inactivate a record](#) (on page 148)

NPDB

The NPDB (National Practitioner Data Bank) is a national repository of information about medical malpractice matters, and is "...a workforce tool that prevents practitioners from moving state to state without disclosure or discovery of previous damaging performance."¹

With proper credentials and configuration, you can interact with the National Practitioner Databank (NPDB). You can request reports from the NPDB for specific providers through a set of pre-existing queries, for instance "Privileging or Employment" or "Fraud and Abuse Investigation." Once you receive a response from NPDB, you can download the report to your inbox, or download the report to your inbox and attach it to a credentialing record, and archive the responses.

Prior to utilizing the NPDB module, a NPDB profile must be created. The profile will include information about the person acting as an NPDB agent (submitting queries) on behalf of the entity. This profile can be shared with other entities defined in your symplr Provider database. You will use this profile for all NPDB transactions. You also give access to NPDB to users from this profile.

The NPDB form consists of several 'mailbox' tabs that help manage your NPDB workflow.

Outbox - The outbox is where you select providers and the type of report to send to the NPDB.

Sent - Sent shows which records you have submitted. You can check for responses or remove requests from the grid from this tab.

Inbox - The inbox is the default tab on the form, and allows you to view and archive reports received from the NPDB. When you choose to view a report, it is sent to your symplr Provider inbox.

Errors - Records that do not pass validation are sent to Errors. Here you can open the provider to enter the missing information, and rerun or archive the request.

Archive Inbox - When you select archive in the inbox, the requests are move to the archive inbox.

Archive Errors - When you select archive in errors tab grid, the requests are move to archive errors.

Tip

You can access the NPDB website from both the NPDB and the NPDB Profile Setup forms by clicking [Visit the NPDB Website](#) .

¹[NPDB website](#)

Manage the NPDB profile

You can create an NPDB profile, add an agent and users to the profile, and share the profile with other entities within your organization.

Create an NPDB profile

A NPDB profile must be configured before the NPDB module can be used. Complete the following steps to create an NPDB Profile.

1. Open the **NPDB Profile Setup** form.
2. On the **Toolbar** (on page 19), click **New**.
3. In the **Profile Setup** section, complete the following substeps.

- a. In the **Data Bank ID** box, type the identification number the NPDB will use to identify this profile.
- b. If the profile is to be available to use, verify that the **Active** check box is selected.
- c. Optional. Type the title and phone contact information for the principle user or authorizer for the NPDB into the applicable boxes.
- d. Optional. In the **Date** box, type the date this profile was certified.
- e. To define billing statement options, in **Subjects per billing statement line item and submission file**, type a number between 1 and 1000.
 - This designates the maximum number of subjects submitted to the NPDB to be included as a single line item on your bill
- f. Click **Save**.

Add an agent to the NPDB profile

To provide contact information for the person acting as an NPDB agent (submitting queries) on behalf of the entity, complete the following steps.

1. Open the **NPDB Profile Setup** form.
2. In the **Agent Information** section, type the person's name, ID, and phone number.
3. Click **Save**.

Share the NPDB profile

To share the NPDB profile with other entities, complete the following steps.

1. Open the **NPDB Profile Setup** form.
2. In the **Profile Sharing** section, click **Add** (+).
3. In **Add Entities**, select one or more entities, then click **OK**.
4. Click **Save**.

Set up NPDB users

To designate a user as an NPDB user, complete the following steps.

1. Open the **NPDB Profile Setup** form.
2. Optional. To add users, in the **User Setup** section, complete the following substeps.
 - a. Click **Add** (+).
 - b. In **Add User**, select one or more users to be designated as NPDB users.
 - c. Click **OK**.
3. In the **NPDB User ID** box, type the user's NPDB user ID Number.

4. Optional. To grant the user correspondence administration rights, select **Correspondence Admin**.
5. Optional. To temporarily inactivate NPDB user status, deselect **Active** next to the user name.
6. Optional. To remove a user from NPDB status, select a user, then click **Remove** ⊖.
7. Click **Save**.

Query the NPDB for provider information

You can query the NPDB from the NPDB form, or from the Send To key on several symplr Provider forms. Once you successfully send a query, you can [Manage NPDB responses and reports](#) (on page 178).

To query the NPDB for information related to selected providers, complete the following steps.

You must first set up an NPDB profile for the entity and be designated as an active user in the profile record before you can query the NPDB for provider information.

1. To select providers for submission to the NPDB, complete the following steps, depending on the situation.

Situation	Steps
From the NPDB form	<ol style="list-style-type: none"> 1. Open the NPDB form. 2. In the NPDB form, select the Outbox tab. 3. Select Add ⊕. 4. In Add Provider(s), search for and select one or more providers, then click Next. 5. In Add Provider(s), select a Query Type, then click OK. <ul style="list-style-type: none"> • The Add Outbox Provider message appears if any providers were not added to the outbox. Click OK.
From the Results tab of a query, or from the following Cactus forms: the Providers , Credentialing/Verification , Credentialing Group , Credentialing Manager , and Group Practices form	For specific steps, see the Use the Send To feature (on page 103) topic in this user help documentation.

2. To submit the queued providers, in the **NPDB** form, complete the following substeps.
 - a. On the **Outbox** tab, in the grid, select one or more providers. (See [Mass updates and mass actions](#) (on page 103))

- b. Click **Actions**, then **Submit queries**.
 - If you receive the **Cannot submit query** message, click **Open Profile** to fix the error and try again.
 - c. In the **NPDB User Authentication** dialog box, in the **Password** box, type your NPDB User Authentication password.
 - i. Click **OK**.
 - Submitted providers who pass validation are moved from the **Outbox** tab to the **Sent Items** tab.
 - Submitted providers with missing information or errors are moved from the **Outbox** tab to the **Errors** tab.
3. On the Sent tab, a message will appear above the grid when record validation is complete. Refresh your screen to see all of the records that have been processed.

NPDB required data

The following symplr Provider fields must be populated with information required by the NPDB before you can submit a query from symplr Provider to the databank.

Form	Provider Type	Required Data
Providers	Individual	First (name), Last (name), DOB (Date of Birth), and Gender. SSN or ITIN are required if there is no professional education record.
Institution	Institution	Institution name, NPDB Ent. Type
Provider Addresses	Individual or Institution	Type (type of "Primary" with an NPDB Meaning of "Primary Office" or "Home Address"), Address (line 1), City, St, ZIP, Country (optional)

Form	Provider Type	Required Data
Licenses	Individual	<p>Type (with an NPDB Meaning of "State License"), Number, Field of Licensure, State, Expiration, and Submit to NPDB (must be checked)</p> <p>If you query a provider who does not have a valid state license, for example, a scrub nurse, you will need to create a generic State License record for them with the following information:</p> <ul style="list-style-type: none"> Type (create a type value of "No License" with an NPDB Meaning of "State License") Number (use "No License" as the number). If the License Number field is blank, the submitted data will contain "No License." Field of Licensure (use "699 Other") State (enter the valid state code). The license must have a valid state that is not "AA", "AE", or "AP." Expiration (enter a future date) Submit to NPDB (must be checked)
Licenses	Institution	Type (with an NPDB Meaning of "Federal Employer Identification Number"), Number, and Submit to NPDB (must be checked)
Education	Individual	Program (with an NPDB Meaning of "Professional Education", Degree, End (date)

Additional notes

Address Validation:

- Only Active addresses will be validated and reported.
- If the state is valid, data in the Country field will not be submitted.
- If the state is empty, there must be data in the Country field.
- If the state is invalid, its value will not be submitted and there must be data in the Country field.
- When country is mandated, there cannot be any digits in the data.
- For an individual, home or work address must be valid. If both are valid, both will be submitted.
- For an institution, the work address must be valid.
- If there is no valid address, the query will not be submitted.

License Validation:

- The license must have a valid state that is not "AA", "AE", or "AP."
- If the License Number field is not blank, it must contain at least one digit.
- If the License Number field is blank, the submitted data will contain "No License."

- The first 60 licenses for a provider (State Licenses and DEA Certificates) will be submitted. If no valid licenses are found, the query will not be submitted.

Manage NPDB responses and reports

You can view all logged communications between you and the NPDB, and review such items as query responses and reports. Use any of the following procedures to retrieve and view NPDB query responses and information.

Check for NPDB responses

To check for any records ready to be returned from the NPDB in response to a query, complete the following steps.

1. Open the **NPDB** form.
2. On the **Sent Items** tab, select one or more records in the grid.
3. Click **Actions**, then **Check for Responses**.
4. In **NPDB User Authentication**, in the **Password** box, enter your NPDB User Authentication password.
5. Click **OK**. Any responses successfully retrieved from the NPDB are now available for review on the **Inbox** tab of the **NPDB** form.

Remove stuck items from sent items

You can remove items that are stuck in sent items.

1. In the **Sent** tab grid, select the check box next to the stuck item, then click **Actions > Remove from Sent**.

View returned NPDB reports

Copies of the actual reports returned from the NPDB are available for download and review at any time. You can select the reports in the NPDB form, then view and download them from your symplr Provider inbox. When you download a report, you can select to also attach it to the associated credentialing record.

To open a report returned from the NPDB in response to a query, complete the following steps.

1. Open the **NPDB** form.
2. On the **Inbox** tab, select one or more records in the grid using one of the available methods. (See [Mass updates and mass actions](#) (on page 103))
3. Click **Actions**, then **View Reports**.
 - The system processes your requests and sends any reports to your symplr Provider **Inbox**.
4. In the left pane, open your symplr Provider **Inbox**.

5. To view and download an NPDB report, next to the record to view, click . (See [Manage inbox items](#) (on page 101))

Archive NPDB responses

Responses received from the NPDB may be removed from the **Inbox** and archived for historical reference. When you archive a record, it is moved to the **Archived Inbox**. To archive a selected NPDB response, complete the following steps.

1. Open the **NPDB** form.
2. On the **Inbox** tab, select one or more records in the grid.

Tip

You can scroll through the grid and sort the records by any of the columns (such as submittal dates, or view the record detail to help you find the records you want to archive.

3. Click **Actions**, then **Archive**.

Attach and/or download an NPDB report

You can attach and/or download a report from the query grid of both the Credentialing/Verification and Credentialing Manager forms. You will also be given the option to create an attachment for that NPDB report to the credentialing record.

Note

- A report can be added to a record multiple times.

Complete the following steps to download/attach an NPDB report.

1. Open either the **Credentialing Manager** or the **Credentialing/Verification** form, then find and select a provider.
2. Select a record, then switch to detail view.
3. In the **Query History** grid, click find the desired record, then click **Click to view this NPDB report** .
4. In **Create Attachment?**, select one of the following
 - a. To send the report to the inbox and create an attachment, click **Yes**.
 - b. To only send the report to the inbox, click **No**.

[Related topics](#)

[View an attachment](#) (on page 93)

[Manage inbox items](#) (on page 101)

The OIG

The Office of Inspector General (OIG) maintains the List of Excluded Individuals/Entities (LEIE), a database providing information to the public related to parties excluded from participation in Medicare, Medicaid, and all other federal health care programs.

In symplr Provider, you can download the most recent LEIE data file directly from the OIG - Manager form, sweep and compare the contents of the LEIE data file to provider information stored within your symplr Provider database, and generate a symplr Provider action record if a match is found.

OIG Sweep results

OIG sweep results are displayed in the OIG Manager form in the Results section after you have run a sweep.

- Sweep results are divided into two separate grids for new exact matches and new partial matches.
- To view previously matched providers, you can select the **Only display Previously matched Providers**.

Once you select a provider, you can compare the OIG and symplr Provider database entries, and easily open both the action and provider forms for the provider. You can also confirm a possible match by viewing additional detail on the OIG website.

OIG history

You can view the history of OIG sweeps as well as the history of sweeps that included a specific provider.

Run the OIG sweep

You can download the latest LEIE data file, select your sweep options and which providers to include in the sweep, then run the sweep.

Complete the following steps to configure and run your OIG sweep.

1. Open the **OIG - Manager** form.
2. In the **Data Updates** section, click **Update**.

Note

For your symplr Provider database to be swept against the most recent data set provided by the OIG, ensure that the contents of the **Local LEIE File Published Date** and the **Latest LEIE File Published Date** fields match..

3. Select the providers to include in the OIG sweep from the following options.

- To include all providers, select the two options referring to inactive providers.
- To include only active providers in the sweep, in the **Sweep Options** section, deselect the two options referring to inactive providers.
- To exclude mismatched birth, NPI, or UPIN data, select the appropriate exclude check boxes.

Note
The value must exist in both the symplr Provider and OIG LEIE data file for these options to apply.

- To include only a subset of providers from your symplr Provider database, complete the following steps, depending on the situation.

Situation	Steps
From the OIG - Manager form	<ol style="list-style-type: none"> 1. In the OIG - Manager form, in the Sweep Options section, select the Include only selected providers check box. 2. Click Add in the corresponding grid. 3. In Add Providers, in the Name box, type the provider's last name, then click Go. 4. Select the provider from the search results, then click Add. 5. Optional. To add additional providers, repeat the previous steps. 6. In Add Providers, click Close. The provider is added to the Sweep Options grid.
From the Results tab of a query, or from the following Cactus forms: the Providers , Credentialing/Verification , Credentialing Group , Credentialing Manager , and Group Practices form	For specific steps, see the Use the Send To feature (on page 103) topic in this user help documentation.

4. To run the sweep, click **Sweep**.

Note

The sweep may take several minutes, depending on the size of your symplr Provider database. An activity icon will appear over the Results table to show that the system is working on the request.

Examine match details

Once you have run an OIG sweep, you can compare a provider's OIG data to your symplr Provider database. The OIG - Manager form also provides the ability to easily access both the action and provider form

To examine match details, complete the following steps.

1. Open the **OIG - Manager** form and complete any of the following in the **Results** section.
2. To compare symplr Provider and OIG information, select a provider name from either grid, then click **View Details** 
 - With the detail view expanded, you can also open the Providers form as a separate work item by clicking **Open the provider** .
3. To confirm a possible match by viewing additional detail on the OIG website, complete the following substeps.
 - a. Click **View details on OIG website** .
 - b. Enter the name of the provider in the fields provided, then click **Search**.
 - c. To confirm that the Social Security Number (SSN) or Employer Identification Number (EIN) you have on file in symplr Provider for your provider matches the SSN or EIN of the provider listed on the OIG website, click the corresponding **Verify** link.
 - d. In the box provided, type the SSN or EIN (without dashes) of the symplr Provider provider you believe to be a match, then click **Verify**.
4. To narrow your sweep results, select **Only display previously matched providers** above the appropriate grid.
5. Optional. If a match is found between the OIG and symplr Provider provider records, an action record may be generated using the following substeps.
 - a. Click **Add provider action** , then add the appropriate information. (See [Create an action record](#) (on page 154))
6. Select the **OIG - Manager** work item to return to the form.
7. Click **Save**.

View OIG history

You can view the history of OIG sweeps or the history of sweeps that included a specific provider.

View OIG sweep history detail

To view a history of OIG sweeps, complete the following.

1. Open the **OIG - Manager** form.
2. In the **History** section, select a sweep date from the grid, then click **View Details** .

View OIG sweep history for a specific provider

To view the history of when the OIG was swept for a specific provider, complete the following substeps.

1. Open the **OIG - Provider History** form.
2. In **Find Provider**, find and select a provider.

Privileges

Privileges are delineated to grant a physician permission to provide patient care. Privileges are specific to the individual's qualifications and competence.

Using symplr Provider, you can assign privileges to a provider, mass update privileges, roll privileges forward upon re-appointing a provider, and edit or inactivate a provider's existing privileges.

Setting up privileges

Privileges (above) are linked to assignments (departments), specialties, or practice areas, depending on the configuration of your symplr Provider database. These assignments (departments), specialties, or practice areas must be set up prior to creating privileges and are created in their corresponding reference list (i.e., Assignment Types, Specialty, or Practice Area).

Privileges are set up in the Privileges [Setup] form. The Privileges [Setup] form displays general information about each privilege. When you set up privileges in symplr Provider, several sections are available for you to record additional privilege details as needed. The following table lists the sections available.

Section	Description	Example
Setup	The Setup section shows the general characteristics of the privilege. This section also contains a Reference Only check box. Selecting this check box indicates the privilege record cannot be assigned to providers, and is a header or instruction entered for display and reporting purposes only.	This section typically lists the name of the corresponding assignment (department), specialty, or practice area, ID number, description of the privilege, date boxes for tracking changes to the privilege, and any qualifications and competencies for holding the privilege.
Boards	The Boards section displays board certification requirements for the privilege in focus.	If a provider were required to hold certification from the American Board of General Surgery in order to obtain a vascular surgery privilege, that information could be entered here.
Restrictions	Any restrictions applicable to the privilege are listed under the Restrictions section.	If a specific type of training were required to demonstrate competency, this would be noted here. This is privilege (procedure) specific.
User Defined	The User Defined section may hold customized fields for your unique needs.	Your organization may require you to track additional information about a privilege that does not apply to any existing sections symplr Provider provides.

Set up privileges

To set up [Privileges](#) (on the previous page), complete the following steps.

Prerequisite

Any assignments (departments), specialties, or practice areas must be set up prior to creating privileges and are created in their corresponding reference list (i.e., **Assignment Types, Specialty, or Practice Area**).

1. Open the **Privileges [Setup]** form, select an assignment, then click **OK**.
2. Create a new privilege from one of the following.
 - a. If no privilege record exists, click **Create a new record**.
 - b. If pre-existing privilege records exist, on the [Toolbar](#) (on page 19), click **New**.

3. In the **Setup** section, complete the following substeps.
 - a. in **Privilege (short)**, type an abbreviated description of the privilege.
 - b. In **Privilege (long)**, type a description of the privilege.

Note
Privilege (short) will populate an empty Privilege (long) upon Save.

- c. Optional. To assign an ID number to the privilege, in **ID**, type the number.
 - d. Optional. To list any initial requirements a provider must meet in order to receive the privilege, the click **Qualifications** , type the requirements, then click **OK**.
 - e. Optional. To list any ongoing requirements a provider must meet to maintain the privilege, click **Competency** , type the requirements, then click **OK**.
 - f. Optional. To record the date the privilege became inactive, in **Inactive**, type the number.
4. Optional. To add board certification requirements for the privilege, in the **Boards** section, click  and select one or more boards.
5. Optional. To add any restrictions applicable to the privilege, in the **Restrictions** section, click  and select one or more restrictions.
6. Optional. If your organization tracks additional privilege information, in the **User Defined** section, enter the required information.
7. Click **Save**.

Arrange privilege display order

By default, the privileges display in the order entered in the system, with the latest entries at the bottom of the list. To change the display order, complete the following steps.

1. Open the **Privileges [Setup]** form.
2. In **Find Assignment Type**, select the appropriate assignment (department), specialty, or practice area, then click **OK**.
3. On the **Toolbar** (on page 19), click **Admin**, then select **Update Sort Order**.
4. In **Update Sort Order**, complete any of the following procedures.
 - To establish a hierarchical arrangement, select one or more items in the list then click **Indent Right** or **Indent Left**  .
 - Click **Sort by Alpha**   once to sort in ascending order, and twice to sort in descending order.
 - Select an item in the list then click **Move to Top** or **Move to Bottom** to move the item to the beginning or end of the list.  
 - Hover over the item to move until you see the drag-and-drop crossed double arrows , then drag and drop the item to the desired location.
5. Click **Save**.

Privilege headers and instructions

In order to display [Privileges](#) (on page 183) instructions and headers on reports, a separate record must be created for each in symplr Provider. For example, you may want to generate a report displaying the privileges: IV Regional, IV Sedation, and Therapeutic Blocks under a privilege header of "Regional Anesthesia." To distinguish the privilege header from the actual privileges, symplr Provider provides a Reference Only check box. Selecting this check box indicates the particular record is not a privilege that can be assigned to a provider. To set up privilege headers and instructions, complete the following steps.

Set up privilege headers and instructions

To set up privilege headers and instructions, complete the following steps.

Prerequisite

Any assignments (departments), specialties, or practice areas must be set up prior to creating privileges and are created in their corresponding reference list (i.e., **Assignment Types**, **Specialty**, or **Practice Area**).

1. Open the **Privileges [Setup]** form, select an assignment, then click **OK**.
2. a. Create a new privilege from one of the following.
 - i. If no privilege record exists, click **Create a new record**.
 - ii. If pre-existing privilege records exist, on the [Toolbar](#) (on page 19), click **New**.
3. In the **Setup** section, check **Reference Only**.

Note

Privilege records marked as **Reference Only** cannot be assigned to providers.

4. Click **Save**.

Working with Privileges

Once you set up privileges for an entity you manage privileges for providers at the entity level. You can assign and roll forward privileges, view privileges and privilege history, edit, inactivate, and delete privileging records.

Assign privileges

After [Privileges](#) (on page 183) have been set up for the assignment (department), specialty, or practice area, you can assign (delineate) them to a provider. To assign privileges, complete the following steps.

Prerequisite

Privileges must be set up and arranged in the **Privileges [Setup]** form prior to being assigned.

1. Open the **Privileges** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Create a new privilege from one of the following.
 - a. If no privilege record exists, click **Create a new record**.
 - b. If pre-existing privilege records exist, on the [Toolbar](#) (on page 19), click **New**.
3. In **Add Provider Privileges**, complete the following substeps.
 - a. In the left pane, in "Filter by Assignment" , type the assignment (department, specialty, or practice area) containing the privileges to be assigned and select it from the list.
 - b. In the right pane, in the privilege listing, select one or more privileges to assign, then click **OK**.
4. In the **Details** section, complete the following substeps.
 - a. In **Granted By**, **Status**, **Start** and **End**, enter the appropriate information.
 - b. Optional. In **Performed**, **Reviewed**, and **Referred**, click the spinner arrows to increment the numbers up or down. Alternatively, you can enter a number from your keyboard.
 - c. Optional. Click **Conditions** and type any conditions or restrictions that will apply to all of the selected privileges.
5. Click **Save**.

Roll forward privileges

To roll forward, a provider's [Privileges](#) (on page 183) complete the following steps.

1. To roll forward all current (active) privileges for a provider, complete one of these procedures.

Situation	Steps
From the Privileges form	<ol style="list-style-type: none"> 1. Open the Privileges form, then find and select a provider. (See Find (Select) Modal (on page 114)) 2. In List View, select the items to be included, then click Actions > Roll Forward. 3. In Roll Forward Privileges, select the appropriate privilege dates option. 4. If specifying custom privilege dates, in the Start and End boxes enter the date range. 5. Click OK.
From the Credentialing / Verification form	<ol style="list-style-type: none"> 1. In the Credentialing / Verification form, select the Setup tab. 2. In the Overview section, click Roll Forward Privileges. 3. In Roll Forward Privileges, select the appropriate privilege dates option. 4. If specifying custom privilege dates, in the Start and End boxes enter the date range. 5. Click OK.
From the Credentialing Manager form	<ol style="list-style-type: none"> 1. Open the Credentialing Manager form and select the credentialing records to roll forward (See Manage multi-credentialing instances (on page 164)). 2. In List View, select the provider to view, then switch to detail view. 3. In the Setup tab, in the Overview section, click Roll Forward Privileges. 4. In the Roll Forward Privileges dialog box, select the 'Roll forward' all provider privileges upon completion check box, and select the appropriate privilege dates option. 5. If specifying custom privilege dates, in the Start and End boxes enter the date range. 6. Click OK.

2. Click **Save**.

Mass update privileges

To renew, or roll forward, a provider's [Privileges](#) (on page 183) complete the following steps.

Situation	Steps
From the Privileges form	<ol style="list-style-type: none"> 1. Open the Privileges form, then find and select a provider. (See Find (Select) Modal (on page 114)) 2. In List View, select one or more records to include using one of the available methods. (See Mass updates and mass actions (on page 103)) 3. Click Actions, then Edit. 4. In the Editing privileges stepper, update any of the available fields, then click Next. 5. Click Finish.
From the Credentialing / Verification form	<ol style="list-style-type: none"> 1. In the Credentialing / Verification form, select the Setup tab. 2. In the Overview section, click Roll Forward Privileges. 3. In Roll Forward Privileges, select the 'Roll forward' all provider privileges upon completion, then select the appropriate privilege dates option. 4. If manually specifying privilege dates, in the Start and End enter the date range, then click OK. <ol style="list-style-type: none"> a. When the provider's credentialing record is completed, all privileges will roll forward according to the privilege dates option selected.
From the Credentialing Manager form	<ol style="list-style-type: none"> 1. See Manage multi-credentialing instances (on page 164).

View privileges

To view a provider's [Privileges](#) (on page 183), complete the following steps.

1. Open the **Privileges** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. To view additional privilege records held by the provider, on the [Toolbar](#) (on page 19), use the left and right record navigation  arrows.
3. Optional. To view all of the provider's privileges at once, on the [Toolbar](#) (on page 19), click the detail/list view toggle  to change from detail view to list view.
4. To close the **Privileges** form, [Work items](#) (on page 22).

View privilege history

To view a provider's privilege history, complete the following steps.

Prerequisite

The **Save Privilege History** check box must be selected in the **Entities - Master Setup** system form in order to maintain, and subsequently view, privilege history.

1. Open the **Privileges** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. In the **History** section, complete the following steps.
 - a. To view detail for a record, highlight the record in the grid, then click **View Details** .
 - b. To view the privilege history for additional privilege records held by the provider, on the [Toolbar](#) (on page 19), use the left and right record navigation  arrows.
3. To close the **Privileges** form, [Work items](#) (on page 22).

Manage Privileges [Setup] records

Edit an existing Privileges [Setup] record

To edit an existing Privileges [Setup] record, complete the following steps.

1. Open the **Privileges [Setup]** form, select an assignment, then click **OK**.
2. In the **Privileges [Setup]** form, edit the privilege as needed.
3. Optional. In the **Inactive** box, type the date the privilege became inactive.
4. Click **Save**.

Inactivate a Privileges [Setup] record

To inactivate a Privileges [Setup] record, complete the following steps.

1. Open the **Privileges [Setup]** form, select an assignment, then click **OK**.
2. Deselect **Active** for the privilege to inactivate.
3. Optional. In the **Inactive** box, type the date the privilege became inactive.
4. Click **Save**.

Delete a Privileges [Setup] record

Note

To maintain data integrity, symplr recommends you inactivate a record instead of deleting it.

To delete a Privileges [Setup] record, see [Delete a record](#) (on page 148).

Provider activity

Provider activity includes Continuing Medical Education (CME), Committees, and Meetings. symplr Provider allows you to:

- create and open CME records by provider or event, add and email CME event attendees, and remove attendees from an event
- create and open committees, and add or remove committee members
- create meetings, and add or remove meeting attendees

CME

You can manage continuing medical education by provider or event, and contact event attendees.

Manage CME by provider

Create and view CME records by provider using the following methods.

Create CME by provider

To create a continuing medical education record for an individual provider, complete the following steps.

1. Open the **CME by Provider** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Create a new record.
 - If no CME by Provider record exists, click **Create a new record**.
 - If pre-existing CME by Provider records exist, on the [Toolbar](#) (on page 19), click **New**.
3. Optional. To associate the provider's CME event with an institution, in the **Institution** section, click **Find** and [Find \(Select\) Modal](#) (on page 114).
4. In the **Setup** section, complete following steps.
 - a. In **Type**, select a CME event type from the list.
 - b. Optional. In **Description**, enter a description of the CME event.
 - c. In **From**, enter the date the CME event is to begin.
 - d. In **To**, enter the date the CME event is to end.
 - e. Optional. In **Speaker**, enter the name of the person speaking at the event.
 - f. Optional. Select **Event Topic**  and type the topic of the event.
 - g. Optional. Select **Event Setup**  and type any setup requirements for the event space.

5. Optional. In the **Accreditation** section, complete following steps.
 - a. In **Attendance**, select the provider's attendance status for the event.
 - b. In **Category**, select the accreditation category for the event.
 - c. In **Local Category**, select the local accreditation category for the event.
 - d. In **Credits**, type the number of credits attendees will earn for attending this event.
 - e. In **Accredited by**, select the accrediting organization for the event.
 - f. In **Related to Privs**, select the relationship this event has to provider privileges.
6. Click **Save**.

Open CME by provider

To open a continuing medical education event record for a specific provider, complete the following steps.

1. Open the **CME by Provider** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Optional. In the **Toolbar** (on page 19), use record navigation  to view the records in a list view or move from one record to another.

Manage CME by event

Create and view CME records by event, or add and remove attendees using the following methods.

Create CME by event

To create a new continuing medical education event record, complete the following steps.

Note

A **CME by Provider** record is also created when a provider is added to a **CME by Event** record.

1. Open the **CME by Event** form.
2. In **Find CME Event**, click **New**.
3. Optional. To associate the provider's CME event with an institution, in the **Institution** section, click **Find**, then find and select an institution. (See [Find \(Select\) Modal](#) (on page 114))
4. In the **Setup** section, complete the appropriate fields.
5. In the **Accreditation** section, complete the appropriate fields.
 - **Credits** is the number of credits attendees will earn for attending this event.
 - Optional. In **Related to Privs**, is the relationship this event has to provider privileges.
6. Click **Save**.

Open CME by event

To open a specific continuing medical education event record, complete the following steps.

1. Open the **CME by Event** form.
2. In **Find CME Event**, set any filters, then click **Search**.
 - You can filter the search by date, type, or description. Leave the filters blank to return all available events.
3. In the search results, select a record, then click **OK**.

Add attendees to CME event

After a continuing medical education event has been created, event attendees can be added. Once the CME event has been populated with attendees and saved, each attendee is displayed in a grid, along with various properties specific to the CME event, such as attendance, CME Category, Local Category, Credits, Accreditation, and any privilege relationship information.

Prerequisite

The CME event must be created before providers may be added to it.

1. To add attendees to a meeting, complete the following steps, depending on the situation.

Situation	Steps
From the CME by Event form	<ol style="list-style-type: none"> 1. Open the form and select an event. 2. In the Attendance section grid, click Add ⊕. 3. In Select Provider(s), search for and select one or more providers from the search results, click Add and then click Close. Selected providers are added to the grid in the Attendance section of the form.
From the Results tab of a query, or from the following Cactus forms: the Providers , Credentialing Manager , and Group Practices form	For specific steps, see Use the Send To feature (on page 103).

2. Click **Save**.

Mass update CME Event attendees

You can mass update records in the Attendance grid. (See [Mass edit select grids](#) (on page 123))

Remove attendees from CME event

To remove attendees from an existing CME event, complete the following steps.

1. , and select an event.
2. In the **Attendance** section grid, select the provider to be removed from the CME event, then click **Remove** .
3. Optional. To remove another attendee from the CME event, repeat the previous step.
4. Click **Save**.

Note

Removing an attendee from a **CME by Event** will delete the corresponding **CME by Provider** record for the attendee.

Email CME event attendees

To send an email to the attendees of a CME event, complete the following steps.

1. , and select an event.
2. In the **Attendance** section, click **Email Attendees**.
3. In **Email Attendees**, select one or more attendees to be emailed, then click **OK**.
 - Attendees without email addresses are grayed out and cannot be selected.
 - Click **Select All** to include all attendees with email addresses.
 - A blank email addressed to the selected attendees opens.
4. Write the email and send it.

Committees

Create committees and manage membership. Once you create a committee, you can add members, then record attendance.

Once the newly created committee has been populated with members and saved, the members are automatically ordered alphabetically by last name on the Committee Setup form. In addition, the committee membership begin date is automatically set to the current date for each member. The end date is left blank, giving each member an open-ended membership in the committee.

Manage committees

You can create and open committees, and add and remove committee members.

Create a committee

You must create a committee before you can schedule a meeting for it. To create a committee, complete the following steps.

1. Open the **Committee Setup** form.
2. In **Find Committee**, click **New**.

3. In the **Committee** section, complete the following steps.
 - a. In **Short Description**, type the name of committee.
 - b. Optional. In **Description**, type a longer, more descriptive name for the committee.
 - If left blank, the short description is duplicated in the description when the record is saved.
 - The committee name in the **Description** box is the committee name displayed in the **Find Committee** modal.
 - c. Optional. Leave **Active** checked if the committee is to be active.
4. Click **Save**.

Open a committee

To open an existing committee of providers, complete the following steps.

1. Open the **Committee Setup** form and find a committee.
 - Optional. Select the **Include Inactive** check box to include inactive committees in your search results.
2. Select the committee, then click **OK**.

Add members to a committee

Prerequisite

The committee must be created before members may be added to it.

Before member attendance can be recorded for a committee, the committee must first be populated with members.

1. To add members to a committee, complete the following steps, depending on the situation.

Situation	Steps
From the Committee Setup form	<ol style="list-style-type: none"> 1. Open the Committee Setup form, then find and select a committee. 2. In the Members section grid, click Add ⊕. 3. In Select Provider(s), Find (Select) Modal (on page 114).
From the Results tab of a query, or from the following symplr Provider forms: the Providers, Credentialing Manager, and Group Practices form	For specific steps, see the Use the Send To feature (on page 103).

2. Click **Save**.

Remove members from a committee

To remove members from a committee, complete the following steps.

1. Open the **Committee Setup** form, find and select a committee, then click **OK**.
 - Optional. Select the **Include Inactive** check box to include inactive committees in your search results.
2. In the **Members** section, select the member to be removed from the committee, then click **Remove** ⊖.
3. To remove another member from the committee, repeat the previous steps.
4. Click **Save**.

Meetings

Create and manage Committee, Department, and General Staff meetings. You can schedule single meetings and recurring meetings. and manage attendees.

Manage meetings

You can create meetings and manage meeting attendance using the following methods.

Create a meeting

To create a committee meeting record, complete the following steps.

1. Open the **Comm & Assign** form.
2. In **Find Meeting Event**, click **New**.

3. In **Create Meeting Event**, complete the following steps.
 - a. Select a meeting type, and if applicable, select a Committee or Department from the list.
 - If you select Department or Committee, the selection box directly below the type categories is automatically retitled to indicate your selection.
 - If you select General Staff, the selection box is removed.
 - b. Schedule the meeting date and frequency.
 - i. In **From**, select the meeting start date of the first meeting.
 - ii. In **To**, select the end date of the first meeting.
 - iii. In **Frequency**, select an option to indicate a one-time meeting or the meeting recurrence pattern.
 - iv. In **Meeting Count**, enter the number of meetings.
 - c. Click **OK**.
4. Optional. To designate a location for the meeting, in the **Institution** section, click **Find** to select an institution.
5. Optional. In the **Setup** section, complete any of the following steps.
 - In **Speaker Name**, type the name of the meeting speaker.
 - To recommend topics for the meeting, click **Topics** , type your entries, then click **OK**.
 - To add required meeting steps, click **Required Steps** , type your entries, then click **OK**.
6. Optional. In the **Accreditation** section, complete any of the following steps.
 - In **Category**, select the accreditation category for the meeting.
 - In **Local Category**, select the local accreditation category for the meeting.
 - In **Credits**, type the number of credits attendees will earn for attending this meeting.
 - In **Accredited by**, select the accrediting organization for the meeting.
 - In **Related to Privs**, select the relationship this meeting has to provider privileges.
7. Click **Save**.

Add attendees to a meeting

After a meeting has been created, meeting attendees can be added. Once the meeting and attendees are saved, attendee and meeting-specific properties display in a grid.

Prerequisite

The meeting must be created before providers may be added to it.

1. To add attendees to a meeting, complete the following steps, depending on the situation.

Situation	Steps
From the Comm. & Assign form	<ol style="list-style-type: none"> 1. Open the Comm. & Assign form. 2. In Find Meeting Event, use the search criteria to search for the meeting. 3. In the search results, select the meeting, then click OK. 4. In the Attendance section grid, click Add ⊕. 5. In Select Provider, in Name, type all or part of the provider's last name, then click Search. 6. To add providers to the Attendance grid, select one or more provider from the search results, then click OK. 7. Optional. To add additional attendees to the meeting, repeat the previous steps.
From the Results tab of a query, or from the following symplr Provider forms: the Providers, Credentialing Manager, and Group Practices form	For specific steps, see Use the Send To feature (on page 103)

2. Click **Save**.

Remove attendees from a meeting

To remove attendees from a meeting, complete the following steps.

1. Open the **Comm. & Assign** form.
2. In **Find Meeting Event**, use the search criteria to search for the meeting, then click **OK**.
3. In the **Attendance** section grid, select an attendee, then Click **Remove** ⊖.
4. To remove another attendee from the meeting, repeat the previous step.
5. Click **Save**.

Provider addresses

A provider can have many different types of address records, including addresses related to a group practice.

The provider address form is used to track all individual provider address records and any additional address-specific data such as additional IDs, limitations, and specialties. Any related group practice addresses are displayed at the bottom of the form.

In order to display a group practice address, a provider must be added to an existing group practice record.

Optionally, you can use the [Address validation](#) (on page 134) feature to verify the accuracy of addresses in the U.S. and Puerto Rico.

Create a provider address record

To create an address record for an individual provider, complete the following steps.

1. Open the **Provider addresses** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114))
2. Create a new address record and assign an institution.
 - If no affiliation record exists, click **Create a new record**.
 - If pre-existing affiliation records exist, on the [Toolbar](#) (on page 19), click **New**.
3. In **Create Address**, select one of the following.
 - Attach an existing group practice address to this provider address record, complete the following substeps.
 - a. In **Create Address**, click **Yes**.
 - b. In **Find Group**, find and select a group.
 - c. In **Select Group Addresses**, select one or more addresses to attach to the provider address record, then click **OK**.
 - Do not attach an existing group practice record.
 - a. Click **No**.

Tip

To create a new group address, see [Create a group practice record](#) (on page 201)

4. In **Provider Address Details**, complete the following steps.
 - a. Select an address type from **Type**.
 - b. Optional. In **From** and **To**, type the respective dates of the provider's association with this address.
 - c. Optional. If the provider address record should be kept from displaying on any online application or service, select **Silent**.
 - d. Optional. If the provider is seeing patients at this location, select **See Patients**.
 - e. Optional. If the provider is accepting new patients at this location, select **Accept New Patients**.
 - f. Optional. If on-site reviews are conducted at this location, select **On-Site Reviews**.
 - g. Optional. In **Home Page**, type the website address associated with the provider at this practice address.
 - h. Optional. In **Email**, type the email address associated with the provider at this practice address.
5. Optional. In the **Additional IDs** section, click **Add** ⊕ to add any additional IDs to be applied to the provider at this practice address.
6. Optional. In the **Office Hours** section, enter the office hours for the provider at this practice address for each day of the week.
7. Optional. In the **Limitations** section, click **Add** ⊕ to select and add any practice limitations that apply to the provider at this practice address.
8. Optional. In the **Specialties** section, click **Add** ⊕ to select and add any specialties that apply to the provider at this practice address.
9. Optional. If your organization tracks additional information about a provider address, in the **User Defined** section, enter the required information.

Warning!

If a group practice address has been attached to this provider address record, the group practice information displayed in the following **Street Address, Categories, Services, Languages, IDs, Review History** and **User Defined & General Hours** sections will be shared with the linked addresses. Editing any of this information will change the information for every linked provider and group addresses.

10. Optional. In the **Street Address** section, type the group practice address, related phone numbers, home page, and email address information into the respective boxes. (See [Working with address validation](#) (on page 134))
11. Optional. In the **Categories, Services, Languages** section, click **Add** ⊕ to select and add any categories, services, and languages that apply to the group practice address.
12. Optional. In the **IDs** section, the **Add** ⊕ to select and add any IDs that apply to the group practice address.
13. Optional. If your organization tracks additional information about the specific address location, in the **User Defined & General Hours** section, enter the required information.

14. Click **Save**.

Create a group practice record

To create a new group practice record, complete the following steps.

1. Open the **Group practices** form.
2. In **Find Group**, search for the group practice.
 - If the group practice is not returned in the search results, click the **New**.

Group Tab

1. In the **Group** tab **General** section, complete the following steps.
 - a. In **Group**, enter the name of the group practice.
 - b. Optional. Type the group practice's **Alternate Name**, **Group ID**, **Group Tax ID**, and **NPI** information into the respective boxes.
 - c. Optional. In **From** and **To**, type the respective dates of the group practice's existence.
 - d. Optional. In **Status**, select the status of the group practice.
 - e. Optional. If the group practice has been terminated, complete the following steps.
 - i. In **Terminated**, type the date of the termination.
 - ii. In the **Term. Reason**, select the reason for the termination.
2. Optional. In the **Specialties** section, click **Add**  to select and add any specialties that apply to the group practice.
3. Optional. In the **Additional IDs** section, click **Add**  to add any additional IDs to be applied to the group practice.

Address tab

1. Optional. To add an address to the group practice record, complete the following substeps.
 - a. On the **Address** tab, select one of the following options.
 - If no address records exist, click **Create a new address**.
 - If pre-existing address records exist, then near the top of the form click **Add Group Address** .

Note

The Address tab indicates which address you are currently viewing, such as Address 2 of 3. To view a different address, use the toolbar navigation buttons.

- b. To add another address to the group practice record, repeat the previous substep.

2. Optional. In the **Address Details** section, complete any of the following steps with information specific to the address displayed.
 - a. Select a **Group Address Type** from the list.
 - b. Type the group practice **ID**, **Tax ID #**, **NPI**, and **Alt. Name** information.
 - c. In **From** and **To**, type the respective dates of the group practice's existence at the specified location.
 - d. In **Home Page**, type the website address that is specific to the group practice at the specified location.
 - e. In **Email**, type the email address that is specific to the group practice at the specified location.
 - f. In the **Status** list, select the status of the group practice at the specified location.
 3. Optional. In the **Additional IDs** section, click **Add** (+) to add any additional IDs to be applied to the group practice at the specified location.
 4. Optional. In the **Office Hours** section, enter the office hours for this group practice for each day of the week at the specified location.
 5. Optional. In the **Specialties** section, click **Add** (+) to select and add any specialties that apply to the group practice at the specified location.
 6. Optional. If your organization tracks additional information about a group practice address, in the **User Defined** section, enter the required information.
 7. Optional. In the **Street Address** section, type the address, related phone numbers, home page, and email address information into the respective boxes. (See [Working with address validation](#) (on page 134))
- Warning!**
If any group practice or provider addresses have been attached to this group practice address record, editing the information displayed on this form will change this information in the associated records.
8. Optional. To add providers to the group practice at the specified location, in the Providers section, complete the following substeps.
 - a. In the **Providers** section, click **Add** (+).
 - b. In **Find Provider**, find and [Find \(Select\) Modal](#) (on page 114) to be added to the group practice.
 9. Optional. In the **Categories, Services, Languages** section, click **Add** (+) to select and add any categories, services, and languages that apply to this group practice location.
 10. Optional. In the **Additional IDs** section, click **Add** (+) to select and add any IDs that apply to the group practice at this location.

11. Optional. If your organization requires you to track additional information about the specific group practice address location that does not apply to any existing sections symplr Provider provides, in the **User Defined & General Hours** section, enter the required information.
12. Click **Save**.

Create a group practice address

A group practice may have many different address locations. To add an address to a group practice, complete the following steps.

1. Open the **Group practices** form.
2. In **Find Group**, find and select a group practice.
3. Select an **Address** tab.
4. Near the top of the form click **Add Group Address**  .
 - A new address form opens in a new incremented tab, for example Address 2 of 2.
5. Enter the relevant information in [Address tab](#) (on page 201). (See [Working with address validation](#) (on page 134))
6. Click **Save**.

Add or edit providers in a group practice

To add a provider to a group practice, complete the following steps.

Note

Providers who are part of a group practice are associated with specific group practice locations.

1. To select providers that should be added to a group practice, complete the following steps, depending on the situation.

Situation	Steps
From the Group Practices form	<ol style="list-style-type: none"> 1. Open the Group Practices form. 2. In Find Group, find and select a group. (See Find (Select) Modal (on page 114))
From the Results tab of a query, or from the following symplr Provider forms: the Providers , Credentialing/Verification , Credentialing Group , and Credentialing Manager form	For specific steps, see the Use the Send To feature (on page 103) topic in this user help documentation.

2. In the **Group Practices** form, select an **Address** tab.

- Use record navigation  to find the group practice location to which the provider is to be added.

Note

The selected location address is displayed directly below the **Addresses** tab at the top of the form.

- To add a provider, in the **Providers** section, complete the following steps.
 - Click **Add** .
 - In **Find Provider**, find and select one or more providers to be added to the group practice.
- To update existing providers, edit the selected provider in grid or detail view, or perform a mass update. (See [Mass edit select grids](#) (on page 123))
- Click **Save**.

Remove a provider from a group practice

To remove a provider from a group practice, complete the following steps.

Note

Providers who are part of a group practice are associated with specific practice locations.

- Open the **Group practices** form.
- In **Find Group**, find and select the group practice.
- In the **Group Practices** form, select the **Addresses** tab.
- Use record navigation  to find the group practice location from which the provider is to be removed.

Note

The selected location address is displayed directly below the **Addresses** tab at the top of the form.

- In the **Providers** section, select the provider to be removed, then click **Remove** .
- To remove another provider from the group practice, repeat the previous steps.
- Click **Save**.

Provider questions

You can create a series of provider questions and input data based on the responses. The questions can serve a variety of purposes (from a general survey to a completely customized form), and you can create as many sets of provider questions as needed. Provider questions are compiled within a Provider Question Type reference list, and open in list view.

After a type is established, responses to the questions can then be recorded, scored, and associated with a provider using the Provider Questions form. Once the responses have been entered on the Provider Questions form, you can query the information and generate documents and reports.

Provider Question Types

The Provider Question Type reference list allows you to create a set of [Provider questions](#) (on the previous page), or checklist items, and customize them to serve a variety of purposes (from a general survey to a completely customized form). Each Provider Question Type may contain as many questions or checklist items as necessary.

Create a Provider Question Type

The first step in using Provider is to create the question type. To [Provider Question Types](#) (above), complete the following steps.

Prerequisite

You must have the required [security rights](#) to view and edit this reference list.

1. Open the **Provider Question Type** reference list.
2. To create a new **Provider Question Type** record, select one of the following options.
 - If there are no provider question type records, click **Create a new record**.
 - If there are pre-existing provider question type records, on the [Toolbar](#) (on page 19), click **New**.
3. In the **Provider Question Type** form, in the **Provider Question Type** section, complete the following substeps.

Note

You can enter the steps directly in list view, or switch to detail view .

- a. In the **Short Description** box, type a short description of the provider question type, such as "Nursing Survey." The **Description** box is auto-populated with the text entered into the **Short Description**.
 - b. Optional. In the **Description** box, expand upon the existing description by typing additional information about the provider question type, such as "Nursing Satisfaction Survey."
4. [Add questions to the Provider Question Type](#) (below).
 5. Click **Save**.

Add questions to the Provider Question Type

To add questions to a [Provider Question Types](#) (above), complete the following steps.

Prerequisite

You must have the required [security rights](#) to view and edit this reference list.

1. Open the **Provider Question Type** reference list and select the question type to which you want to add questions.
2. Toggle to detail view .
3. To add a new question, in the **Item** grid, click **Add** .
4. In **Item**, type a question.
5. In **Label 1**, type the label for the response.
6. In **Type 1**, select an option from the list.
 - If you select **Selection List**, complete the following substeps.
 - a. In the **Selections** grid, click **Add** , then type your selection.
 - b. Repeat the step above to add additional selections.
7. In **Entity**, select the entity to which the question should be related.
 - a. To allow users at other entities to view the question, select **Other entities can View**.
 - b. To allow users at other entities to input a response to the question, select **Other entities can View & Edit**.
 - c. To allow users to mark the question as not applicable, select **Allow N/A responses**.
8. To allow users to score the question, complete the following substeps.
 - a. Select **Score this item**.
 - b. In **Score**, enter a score for the question.
 - c. In **Weight**, enter the weight of the question.
9. Optional. Repeat the previous steps to add additional questions.
10. Optional. To reorder your questions, complete any of the following in the **Item** grid.
 - Click  next to an item and select either **Move to top** or **Move to bottom**.
 - Drag and drop an item to to a new location in the grid.
11. Click **Save**.

Update sort order of provider question types

To update the order in which provider question types appear, complete the following steps.

Prerequisite

Two or more reference list values are required to enable the update sort order functionality.

You must have the required [security rights](#) to view and edit this [Reference lists](#) (on page 243).

1. Open the **Provider Question Type** reference list.
2. On the symplr Provider toolbar, click **Admin**, then select **Update Sort Order**.
3. In **Update Sort Order**, complete any of the following substeps.

- Click **Sort by Alpha**  once to sort in ascending order, and twice to sort in descending order.
 - Select an item in the list then click **Move to Top** or **Move to Bottom** to move the item to the beginning or end of the list.  
 - Hover over the item to move until you see the drag-and-drop crossed double arrows , then drag and drop the item to the desired location.
4. Click **OK**.
 5. Click **Save**.

Record responses to provider questions

Once the provider question type have been created, and questions added to the type, the responses can be recorded and linked to a provider. To record responses to provider questions, complete the following steps.

1. Open the **Provider Questions** form.
2. In **Find Provider**, find and [Find \(Select\) Modal](#) (on page 114).
3. If the provider already has a Provider Questions record in symplr Provider, on the symplr Provider toolbar, click **New**; otherwise, click the **Create a new record** link.
4. In **Select Provider Question Type**, select the appropriate question type, then click **OK**.
5. To complete the **Provider Questions** form, complete the following substeps.
 - a. In the **Setup** section, select the **Completed** check box, and in the **Date** box, type the completion date.
 - b. In the **Questions** section, type the responses received from the provider.
 - c. Optional. If your organization tracks additional information about Provider Questions, in the **User Defined** section, enter the required information.
6. Click **Save**.

Inactivate a Provider Question Type

To inactivate a Inactivate a Provider Question Type, complete the following steps.

Prerequisite

You must have the required [security rights](#) to to perform this procedure.

1. Open the **Provider Question Type** reference list.
2. Deselect **Active** for the question to inactivate.
3. Click **Save**.

Delete a Provider question type

To delete a Provider question type, complete the following steps.

Prerequisite

You must have the required [security rights](#) to perform this procedure.

Note

To maintain data integrity, symplr recommends you remove a provider question type instead of deleting it.

1. Open the **Provider Question Type** reference list.
2. Select the record to delete, then on the symplr Provider toolbar click **Delete**.
3. To confirm deletion, click **Yes**.
4. Click **Save**.

Delete a Provider questions record

To delete a Provider questions record, complete the following steps.

Prerequisite

You must have the required [security rights](#) to perform this procedure.

1. Open the **Provider Questions** form.
2. In Find Provider, find and select a provider.
3. On the symplr Provider toolbar, use record navigation  to locate the Provider Questions record you want to delete.
4. On the [Toolbar](#) (on page 19), click **Delete**.
5. To confirm deletion, click **Yes**.
6. Click **Save**.

Provider summary

The Provider Summary form displays a provider's professional and biographical information as a quick reference. This form enables you to quickly view the available record types for a selected provider without searching for each record individually in Quick Launch. If a provider photo (.jpg or .png) exists in the system, the latest active profile photo will display.

In addition to the General and Notifications sections, the Provider Summary is organized into sections based on form type. Each form section, collapsed by default, includes a record count and a shortcut to open the form. These forms are the same ones available to you in Quick Launch.

Note

Dues (an optional add-on) do not appear in Provider Summary, and Specialties and Boards are collapsed into a single section in this form.

You may expand multiple sections to view the records listed in each section grid, or select a single record and open it in detail view.

Note

Insurance records marked as "inactive" in the application will not appear in the Notifications section.

Reviews

symplr Provider can help manage three types of reviews. You can build multiple review question sets for medical records and site reviews using the Review Types (Site/med rec.) reference list. Once a review type is established, responses to the questions can then be recorded, scored, and associated with providers and group practices using the Reviews form. Once the responses have been entered on the Reviews form, you can query the information and generate documents and reports.

Peer reviews use the Peer Reviews form and the Review Types reference list.

Medical records review

As the primary source of a patient's treatment and care, the medical record must be consistent with standards, complete, accurate, and truthful. Medical records reviews are routinely conducted to identify deviation from standard requirements for information and/or standard of care contained in patient records.

Site review

As part of a managed care organization's office site standards, a site review may be conducted based on a threshold of patient complaints. The site review will include a determination of the accessibility and physical appearance of the site, acceptability of waiting and exam rooms, and adequacy of medical record keeping.

Peer review

A peer review, or professional practice evaluation (PPE), is the defined process of evaluating the clinical or medical performance of a health care professional. Formal peer review is generally carried out by a committee representing professionals within the specialty discipline.

Review types

The Review Types (Site/med rec.) reference list allows you to create a set of questions, or checklist items, and customize them to serve a variety of purposes (from office site reviews to medical records reviews). Each review type may contain as many questions or checklist items as necessary.

Create a review type

Creating a review type is the first step in using reviews. Complete the following steps to create a review type.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to view and edit a reference list.

1. Open the **Review Types (site/med rec.)** reference list.
2. Create a new **review type** record based on your situation.
 - If review type records exist, click **Create a new record**.
 - If pre-existing review type records exist, on the **toolbar**, click **New**.
3. In **Review Types (site/med rec.)**, complete the following substeps.
 - a. In the **Short Description** box, type a short description of the review type, such as "Site Review." The **Description** box is automatically populated with the text entered into the **Short Description**.
 - b. In the **Description** box, expand upon the existing description by typing additional information about the review type, such as "Site Review - Managed Care."
4. [Add questions to the Provider Question Type](#) (on page 205).
5. Click **Save**.

Add questions to the review type

To add questions to a Review Types (site/med rec.) reference list, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to view and edit this reference list.

1. Open the **Review Types (site/med rec.)** reference list and select the question type to which you want to add questions.
2. Toggle to detail view .
3. To add a new question, in the **Item** grid, click **Add** .
4. In **Item**, type a question.
5. In the **Label 1** box, type the label for the response.
6. In **Type 1**, select an option from the list.
 - If you select **Selection List**, complete the following substeps.
 - a. In the **Selections** grid, click **Add** , then type your selection.
 - b. Repeat the step above to add additional selections.
7. In **Entity**, select the entity to which the question should be related.
8. To allow users at other entities to view the question, select **Other entities can View**.

9. To allow users at other entities to input a response to the question, select **Other entities can View & Edit**.
10. To allow users to mark the question as not applicable, select **Allow N/A responses**.
11. To allow users to score the question, complete the following substeps.
 - a. Select **Score this item**.
 - b. In **Score**, enter the score of the question.
 - c. In **Weight**, enter the weight of the question.
12. Optional. Repeat the steps above to add additional questions.
13. Optional. To reorder your questions, complete any of the following in the **Item** grid.
 - Click  next to an item and select either **Move to top** or **Move to bottom**.
 - Drag and drop an item to to a new location in the grid.
14. Click **Save**.

Update sort order of review types

Two or more item values are required to enable the update sort order functionality.

Prerequisite

You must have the required [security rights](#) to view and edit this reference list.

To update the order in which review types appear, complete the following steps.

1. Open the **Review Types (site/med rec.)** reference list.
2. On the symplr Provider toolbar, click **More**, then select **Update Sort Order**.
3. In **Update Sort Order**, complete any of the following substeps.
 - Click **Sort by Alpha**  once to sort in ascending order, and twice to sort in descending order.
 - Select an item in the list then click **Move to Top** or **Move to Bottom** to move the item to the beginning or end of the list.  
 - Hover over the item to move until you see the drag-and-drop crossed double arrows , then drag and drop the item to the desired location.
4. Click **OK**.
5. Click **Save**.

Record responses to reviews

Once the review type has been created, and questions added to the type, the responses can be recorded and linked to a provider. To record responses to reviews, complete the following steps.

1. Open the **Reviews** form.
2. In **Find**, select either **Provider Name** or **Group Name**.

3. In **Name**, type the provider's last name, then click **Go**.

Tip

In the results grid, you can filter by any column to limit the results, for instance to include on site review addresses, or exclude silent or inactive addresses.

4. Select a provider or group from the search results, then click **OK**
5. Create a new reviews record.
 - a. If no reviews record exists, click **Create a new record**.
 - b. If pre-existing review records exist, on the **Toolbar** (on page 19), click **New**.
6. In **Create Review**, complete the following substeps.
 - a. In **Select Review Type**, select the appropriate review type.
 - b. In **Select Providers and Groups**, select any groups and providers to be reviewed.

Note

When the review is saved, a **Reviews** record will be automatically created for every group and provider you have selected.

- c. Click **OK**.
7. To complete the **Reviews** form, complete the following substeps.
 - a. Switch to detail view.

On the **Summary** tab, in the **Review Information** section, enter the appropriate date information.
 - b. Optional. If your organization requires you to track additional information about a reviews record that does not apply to any existing sections symplr Provider provides, in the **User Defined** section, enter the required information.
 - c. On the **Review Details** tab, enter the responses received from the provider.
 8. Click **Save**.

Inactivate a review type

To inactivate a review type, complete the following steps.

Prerequisite

You must have the required [security rights](#) to view and edit this [Reference lists](#) (on page 243).

1. Open the **Review Types (site/med rec.)** reference list.
2. Deselect **Active** for the review type to inactivate.
3. Click **Save**.

Delete a review type

To delete a review type, complete the following steps.

Prerequisite

You must have the required [security rights](#) to perform this procedure.

Note

To maintain data integrity, symplr recommends you inactivate a review type instead of deleting it.

1. Open the **Review Types (site/med rec.)** reference list.
2. Select the record to delete, then on the symplr Provider toolbar click **Delete**.
3. To confirm deletion, click **Yes**.
4. Click **Save**.

Delete a review record

To delete a review record, complete the following steps.

Prerequisite

You must have the required [security rights](#) to perform this procedure.

1. Open the **Reviews** form.
2. In **Find**, select either **Provider Name** or **Group Name**.
3. In **Name**, type the provider's last name, then click **Go**.
4. Select the provider from the search results, then click **OK**.

Tip

In the results grid, you can filter by any column to limit the results, for instance to include on site review addresses, or exclude silent or inactive addresses.

5. On the **Toolbar** (on page 19), use record navigation  to locate the review record you want to delete.
6. On the symplr Provider toolbar, click **Delete**.
7. To confirm deletion, click **Yes**.
8. Click **Save**.

Peer review

A peer review, or professional practice evaluation (PPE), is the defined process of evaluating the clinical or medical performance of a health care professional. Formal peer review is generally carried out by a committee representing professionals within the specialty discipline.

Create a peer review record

To create a peer review record, complete the following steps.

1. Open the **Peer Reviews** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114)).
2. Create a new peer review record.
 - If no peer review record exists, click **Create a new record**.
 - If pre-existing peer review records exist, on the [Toolbar](#) (on page 19), click **New**.
3. In the **Peer Reviews** form, expand the **Review Information** section and complete any of the following substeps.
 - a. In the **Committee** list, select the committee performing the review.
 - b. In the **Assignment** list, select the department, section, or practice area of the review committee.
 - c. In the **Criterion** list, select the type of peer review.
 - d. In the **Presentation** list, select the condition of the patient.
 - e. In the **Effect on Care** list, select the effect of care on the patient.
 - f. In the **Outcome** list, select the final condition of the patient.
 - g. In the **ID** box, type the identification number assigned to the case or medical record.
 - h. In the **Reviewed** date box, type the date of the peer review.
 - i. In the **Closed** date box, type the date the review event concluded.
 - j. In the **Occurrence** date box, type the date of the occurrence.
 - k. If a recommendation has been made, select the **Recommendation Made** check box.
 - l. Click **Recommendation**  and type any notes on the recommendation.
 - m. Click **Description**  and type a description of the peer review.
4. Optional. If your organization tracks additional information about a peer review record, in the **User Defined** section, enter the required information.
5. Click **Save**.

Delete a peer review record

To delete a peer review record, complete the following steps.

Prerequisite

You must have the required [security rights](#) to perform this procedure.

1. Open the **Peer Reviews** form, then find and select a provider. (See [Find \(Select\) Modal](#) (on page 114)).
2. On the [Toolbar](#) (on page 19), use record navigation  to locate the peer review record you want to delete.
3. On the [Toolbar](#) (on page 19), click **Delete**.
4. To confirm deletion, click **Yes**.
5. Click **Save**.

symplr Provider administration

Administer symplr Provider using a variety of system forms. Application administration includes such activities as initial setup, configuration, maintenance, user management and security, and activity monitoring.

System forms

Most administrative functions, such as establishing your organization's desired application configuration and security settings, are completed using system forms.

System form descriptions

Select a category link to view a information about system forms in that category.

Tip

To find topics that refer to a specific system form, search on the system form name.

File and Database

System form	Description
DBA Utilities	This system form contains several utilities to enhance and diagnose the performance of the underlying database. These include: Update provider display order (on page 241), Copy user group security, Update CPT/ICD Codes, Update area codes (on page 235), and Database Sync In addition, applications and profiles downloaded from the client section of our website may imported into the application via this form. On premise installations also include Validate user emails .
Files - Master Setup	This system form is used to designate which forms and files are "active" in the application. Depending on the setting chosen, forms, queries, documents, reports, and others can be displayed or hidden. Auditing is also enabled for each form or file type via this system form.
Flat File Filter Setup	symplr Provider provides flat file filters for basic demographic information such as addresses, licenses, and specialties. The Flat File Filter Setup system form allows you to customize these filters using filter expressions.

Optional modules

Each of the optional modules includes a system form to configure module settings.

System form	Description
Affiliation Letter Configuration	Ties in with our Affiliation Letters product. Shows all User Accounts and letter generation history.
Application Manager Configuration	Various configuration settings for the optional Application Manager module.
Application Manager Users	Use this system form to grant current application users access to the optional Application Manager module. Once the users have been successfully added, they will be available for selection and can be assigned to various tasks in Application Manager.
CAQH Export Configuration	The types of data included in our optional CAQH bulk upload (a pipe-delimited file consisting of symplr Provider provider data) may be customized using the CAQH Export Configuration system form.
Committee Manager Configuration	The Committee Manager settings determine how your organization will use Committee Manager and the users and user groups authorized to conduct reviews processes.
Internal Provider Directory Configuration	Various configuration settings for the optional Internal Provider Directory.
Pharmacy Lookup Configuration	Manage user access to Pharmacy Lookup.
Provider Directory Configuration	Various configuration settings for the optional Provider Directory.

Security

System form	Description
<p>Entities - Master Setup</p>	<p>Once a user/user group has been set up in the application, rights may be assigned to that user/user group. The main function of the group must be considered when determining which access rights to assign the group. Once the purpose of the group has been identified, the Entities - Master Setup system form can be used to assign access and rights to the forms/files. The program offers system administrators a wide variety of options for configuring user groups and the rights each user will inherit.</p> <p>This form is also used to set the log on message that appears upon logon, when changing entities, and as a banner message on the Home hub.</p>
<p>Security Manager</p>	<p>This system form provides a central location for you to administer security for all symplr Provider forms, queries, documents, and other files, as well as set access to multiple files and user groups.</p>
<p>Security Policy Setup</p>	<p>Use this system form to control how a user accesses the application, including LDAP. In addition, elements such as password age, length, complexity, encryption, and lockout threshold can be configured via the form to provide additional security.</p> <div data-bbox="423 1102 1442 1203" style="border: 1px solid red; border-radius: 10px; padding: 5px; margin-top: 10px;"> <p>Warning! This form is hidden if the user is working in a SaaS instance of Cactus.</p> </div>
<p>Users - Master Setup</p>	<p>To use the application, each user must be assigned a User ID and password. Use this system form to create a user profile, associate the user to a specific user group, and manage access in the application.</p>
<p>User Groups - Master Setup</p>	<p>Use this system form to set up a user group. This is the first step in assigning access in the program. A user group may consist of a single user, or multiple users with similar responsibilities.</p>

System

System form	Description
Event Viewer	This system form displays events, such as errors, exceptions, warnings, login attempts, and informational messages originating from any service within symplr Provider.
Institution Merge Utility	When you need to eliminate duplicate institution records, you can use the Institution Merge Utility system form in symplr Provider to merge multiple institutions into a single institution automatically.
Internal Provider Directory Config	Various configuration settings for the Internal Provider Directory.
System Information	This system form provides greater control over several of the default settings in the application, such as setting session timeouts and enabling address validation. Configure email, web services, and service proxy settings via this form.
System Scheduled Tasks	System scheduled tasks are provided by symplr and included in the application Data Requirements package. These system tasks are set to run on a particular schedule that meets the needs of most clients; however, the default settings may be adjusted in the System Scheduled Tasks system form with the assistance of symplr, if necessary.
Web Service Configuration	This system form is used for custom web services (or custom projects) and for storing URL's related to web services that accompany symplr Provider FormBank and Peer Reviews. This form should not be modified prior to consulting with the symplr development team.

Other administrative topics

The following user help topics are administrative in nature; however, they utilize forms in symplr Provider not classified as "system" forms.

- [Support mode](#) (on page 253)
- [Interface cross reference](#) (on page 251)
- [Set access to form fields](#) (on page 230)
- [Set access to attachments](#) (on page 232)

Open a system form

To open a system form, complete one of the following procedures.

Situation	Steps
Global Search box	<ol style="list-style-type: none"> 1. In the Global Search box, type S: followed by all or part of the name of the desired system form and press Enter. 2. Under Search Results, click the desired system form.
System hub	<ol style="list-style-type: none"> 1. In the System hub, click the All System Forms. 2. Under Search Results, click the desired system form.

Security policy setup

Use the **Security Policy Setup** system form to control a user's access to symplr Provider. The following table lists the available security policy settings.

Warning!

This form is only available to on premises customers using local account authorization (not SSO).

Password policy

Descriptions of each password setting available in symplr Provider are as follows.

Setting	Description
Maximum Password Age	The maximum number of days a user password may be used before it expires.
Minimum Password Length	The minimum number of characters a valid password must contain.
Account Lockout Threshold	The number of consecutive failed logon attempts allowed before the account is locked out of symplr Provider.
Minimum Unique Passwords	The number of unique passwords a symplr Provider user is required to use before being allowed to reuse an old password.

Setting	Description
Minimum Password Complexity Required	<p>This setting requires every password to meet a minimum level of complexity regarding the number and types of alphanumeric characters in the password:</p> <ul style="list-style-type: none"> • Password must not contain the user's name. • Password must contain one English character (A through Z). • Password must contain one Base 10 digit (0 through 9). • Password must contain one non-alphanumeric character (e.g., !, \$, #).
Store Hashed Passwords	<p>This setting allows a symplr Provider administrator to hash or encrypt the password used to log on to symplr Provider.</p>

Set security policy

To set security policy for symplr Provider, complete the following steps.

You must also have the required [symplr Provider security](#) (on page 225) to set security policy.

1. Open the **Security Policy Setup** system form.
2. In the **Password Policy** section, complete the following substeps.
 - a. In **Maximum Password Age (in days)**, enter the maximum number of days before a password expires.
 - b. In **Minimum Password Length**, enter the minimum number of characters allowed for a password.
 - c. In **Account Lockout Threshold**, enter the number of allowed logon attempts before a users is locked out of symplr Provider.
 - d. In **Minimum Unique Passwords**, enter the number of unique passwords that a user is required to use before being allowed to reuse a password.
 - e. To require every symplr Provider password meet a minimum level of complexity regarding the number and types of alphanumeric characters in the password, check **Minimum Password Complexity Required**.

For more information on symplr Provider password complexity, see [Security policy setup](#) (on the previous page).

3. Click **Save**.

Manage user groups

You can create user groups and manage user group and entity membership.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to manage user groups.

Create a user group

You can assign a symplr Provider user to a user group with shared group access rights and responsibilities. To create a symplr Provider user group and add access to file types, complete the following steps.

1. Open the **User Groups - Master Setup** system form.
2. On the symplr Provider toolbar, click **New**.
3. In the **User Group** section, in **Group Name**, type the name of the user group.
4. In the **Advanced Rights** section, complete any of the following substeps.
 - a. To give the user group access to symplr Provider, select **Interactive Session - Allow Access**.
 - b. To give the user group access to optional modules, select **WEB Sessions - Allow Access**.
5. In the **Security - Files** section, set group access to specific file types.
 - a. Select **Forms**, then select **Add** ⊕.
 - b. In **Add Forms**, select one or more forms, then click **OK**.
 - c. Optional. In the grid, adjust the user group's access rights to individual forms as necessary by selecting or clearing the check boxes for each access right displayed.
 - d. Repeat the above steps for queries, documents, reports, and the other file types listed on the tab in the **Security - Files** section.

Warning!

Shared file types (symplr Provider Documents, Reports, and so on) are driven by shared queries. Anything changed in the Results, Filters, or Linked Items of a shared query will be changed for all user groups and entities that share the query. This may significantly alter or "break" multiple shared files. When a user attempts to make such a change to a shared query, a Warning dialog appears and lists all documents drawing information from the shared query.

6. In **Online Data Viewers - Security**, set the default provider view for the user group.
 - To show all providers, select **Show all providers**.
 - To show a subset of providers, complete the following substeps.
 - a. Select **Show only those providers in the queries below**:

Note
Filtering Active is enabled by default.
 - b. Optional. **Add** ⊕ or **Remove** ⊖ queries from the grid.
 - c. Optional. **View Details** ∨ to assign an **Action** to a query.
7. Optional. In **Security - Flat Files**, **Add** ⊕ or **Remove** ⊖ any flat files.
 - a. To allow editing rights to a flat file, click **View Details** ∨, then select **Edit**.
8. Click **Save**.

Add a user to a user group

To add a user to a user group, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to add a user to a user group and must have already created the user you want to add. See [Manage users](#) (on the next page) for instruction.

1. Open the **Users - Master Setup** system form.
2. In **Select User**, select the user from the list, then click **OK**.
3. In **Account Settings**, click **Add to Group** ⊕.
4. In **Find User Group**, select a user group, then click **OK**.
5. Click **Save**.

Remove a user from a user group

To remove a user from a user group, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to remove a user from a user group.

1. Open the **Users - Master Setup** system form.
2. In **Select User**, select the user from the list, then click **OK**.

3. In **Account Settings**, click **Remove from Group** .
4. Click **Save**.

Add a user group to an entity

A user group must be granted access to the entity as part of the master setup record for the entity.

Prerequisite

You must have the required [symplr Provider security](#) (on the next page) to add a user group to an entity and must have already created the user group you want to add.

1. Open the **Entities - Master Setup** system form.
2. Select an entity, then click **OK**. (for multi-entity users only)
3. In the **User Groups** section, click **Add** .
4. In **Add User Groups**, select one or more user groups, then click **OK**.
5. Click **Save**.

Remove a user group from an entity

You can remove a user group from an entity, or disable entity access for future use.

To remove a user group access using either of these methods, complete the following steps.

1. Open the **Entities - Master Setup** system form.
2. In the **User Groups** section, in the grid, select the user group you want to remove, then click **Remove** .
3. In **Remove User Group**, perform one of the following actions.
 - To remove the user group and its associated settings from the entity, click **OK**.
 - To retain the group but remove access to the entity, complete the following steps.
 - a. Click **Cancel**.
 - b. In the **User Groups** section, uncheck **Entity Access** for the group.
4. Click **Save**.

Manage users

You can create and manage user accounts using the following methods.

Create a user account

To create a symplr Provider SSO user account, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (below) to create a user account.

1. Open the **Users - Master Setup** system form.
2. In **Select User**, select **New**.
3. In **Add New User**, complete the following steps.
 - a. Enter an email address for the user, then click **Find**.
 - b. Enter and **First Name** and **Last Name** for the user, then click **Invite**.
 - c. Click **OK**.
4. In **Account Settings**, complete the following steps
 - a. Click **Add to Group** .
 - b. In **Find User Group**, select a user group, then click **OK**.
5. Optional. In the **Name** section, enter any additional contact information for the user.
6. Optional. In **Account Settings**, enter any of the following information.
 - Deselect **Active** if the account should not be immediately active.
 - In **Account Expiration**, select a date to expire the account.
7. Optional. In **Advanced Rights**, if a group has not been selected for a user, select one or more session access types.
 - To give the user access to symplr Provider, select the **Interactive Session**.
 - To give the user access to optional modules, select the **WEB Session** check box.
8. Optional. In the **Institution** section, click **Find** to find and select an institution.
9. Click **Save**.

Lock a user account

You can lock a user's account to prevent the user from logging on to symplr Provider. To lock a user account, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (below) to lock a user account.

1. Open the **Users - Master Setup** system form.
2. In **Select User**, select the user, then click **OK**.
3. In the **Account Settings** section, select **Locked**.
4. Click **Save**.

symplr Provider security

Security in symplr Provider may be set at the entity, form, or field level. These multiple security levels allow you to control the type of user group access from the entity level down to individual fields on a form.

In order to apply security, a file must first be made available to an entity. This is known as file activation. Once entity-level security is set, user group access can be managed for files and form fields. The following two system forms are used for managing security:

- **Files - Master Setup** allows you to activate symplr Provider file types (such as a form, query, document, reference list, and so on) for the active entity. You can also set the auditing status.
- **Entities - Master Setup** allows you to manage user group access to symplr Provider file types, and apply field-level access to forms.

File security

symplr Provider uses various system forms to help you manage security for files, fields, and attachments.

File-level security

With these system forms, you can set file access to forms, queries, documents, reports, reference lists, other system forms, profiles, and related web applications.

Tip

Before you can grant file access to user groups, you must first activate the file and grant access to the user group's entity. (See [Activate a file](#) (on the next page) and [Manage entity access to a file](#) (on the next page))

File access right settings

You can apply the following settings to control a user group's access to files set at the entity level.

Setting	If enabled
New	The user group may create new records.
Change	The user group may make changes to existing records.
Delete	The user group may delete existing records.
Set Security	The user group may make changes to the form security settings.
Sort Order	The user group may make changes to the order in which a form list is displayed.
Audit Log	The user group may access the form audit log.
Notes	The user group may create field-specific notes.
Attachments	The user group may access and attach new files to a record in the form.

Set access to attachments

You can restrict a user group's access to view and edit form attachments.

Manage field level access

You can add and remove field-level access to form fields and attachment fields. This allows you to assign read or write access, or even hide a field from a group of users.

Activate a file

When you activate a file, it is added to the list of available files for the selected entity.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to activate a file.

Note

After a file is activated, you can restrict access to it in the **Entities - Master Setup** system form.

1. Open the **Files - Master Setup** system form.
2. Select the tab for the type of file you want to activate.
3. In the **Active** column, select the check box for each file to activate.
4. Optional. In the **Auditing** column, select an auditing level from the list for the affected files.
5. Click **Save**.

Manage entity access to a file

You can restrict an entity's access to forms, queries, documents, reports, and other file types. Complete any of the following procedures to view and manage security for an entity.

With the appropriate security, you can manage entity access to a file and change how a filename displays.

Grant entity access

Once a file has been activated, it is added to the list of available files to which an entity may be granted access. To grant an entity access to an active file, complete the following steps.

1. Open the **Entities - Master Setup** system form.
2. In the **File Setup** section, select the tab for the file type.
3. In the file grid, click **Add** .
4. In **Add**, select one or more files, then click **OK**.
 - The file will be added to the grid.
 - The System Administrators user group will be granted **Change** and **Delete** access to the file at the entity by default and appear in the User Group grid directly below the file grid.
5. In the file grid, in the **Active** column, verify the check box is selected for the file just added.
6. Click **Save**.

View files accessible to an entity

To view forms to which an entity currently has access, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to view files accessible to an entity.

1. Open the **Entities - Master Setup** system form.
2. In the **File Setup** section, select the tab for the file type. All files to which the entity currently has access are listed in the file grid with the **Active** check box selected.

Remove entity access

To remove an entity's access to a file, complete the following steps.

1. Open the **Entities - Master Setup** system form.
2. In the **File Setup** section, select the tab for the file type.
3. In the file grid, select the file, then click **Remove** . The file is removed from the grid.
4. Click **Save**.

Change how file name is displayed

To change the default name of a symplr Provider file to a name more recognizable to your users, for example, to change the [Create an assignment record](#) (on page 139) to "Departments" at a hospital entity, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to change how a file name is displayed in symplr Provider.

1. Open the **Entities - Master Setup** system form.
2. In the **File Setup** section, select the tab for the file type. All files corresponding to the selected file type to which the entity currently has access will be listed in the file grid.
3. In the file grid, select the file to be edited.
4. In the **Optional Description** column, type a different description for the selected file.

Note

The optional description will be displayed only at the current entity.

5. Click **Save**.

Manage user group access to files

Use the following methods to view and manage group access to files.

Grant user group access to a file

Once a file has been activated and an entity has been granted access to it, a user group may then be granted access to the file. To grant a user group access to an active file, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) and files must be activated prior to granting user group access to a file. See [Activate a file](#) (on page 227) and [Manage entity access to a file](#) (on page 227) for more information.

1. Open the **Entities - Master Setup** system form.
 - For users with access to multiple entities, select an entity, then click **OK**.
2. In the **File Setup** section, complete the following steps.
 - a. Select the tab for the file type, for example **Forms**.
 - b. In the file grid, select the file to which you want to grant a user group access.
 - c. In the user group grid, click **Add** .
 - d. In **Add User Groups**, select one or more groups, then click **OK**.

Note

The user group must be added to the entity before it can be granted access to a file. The user group will be added to the grid and automatically granted **New**, **Change**, and **Delete** access to the file at the entity by default.

3. Optional. Select any additional file access rights for the user group, for example, **Set Security**, **Sort Order**, **Audit Log**, **Attachments**, or **Notes**. (See [File security](#) (on page 226))
4. Click **Save**.

View user group access to files

To view user group access to files, complete the following steps.

1. Open the **Entities - Master Setup** system form.
2. In the **File Setup** section, complete the following steps.
 - a. Select the tab for the file type, for example **Forms**.
 - b. Locate and select the desired file.
 - In the **User Group** grid, all user groups that have been granted access to the file are displayed. Their access rights to the file are also displayed in the form of selected check boxes.

Remove user group access to a file

To remove user group access to a file, complete the following steps.

1. Open the **Entities - Master Setup** system form.
 - For users with access to multiple entities, select an entity, then click **OK**.
2. In the **File Setup** section, complete the following steps.
 - a. Select the tab for the file type, for example **Forms**.
 - b. In the file grid, select the file to which you want to remove user group access.
 - c. In the **User Group** grid, select the user group to remove, then click **Remove** .
3. Click **Save**.

Set access to form fields

You can restrict a user group's access to fields within a form in security setup mode. To manage a form's field-level security settings for a user group, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) and files must be activated and accessible at the entity prior to setting field-level access. See [Activate a file](#) (on page 227) and [Manage entity access to a file](#) (on page 227) for more information.

1. Open the form in security setup mode using one of the following methods.

Situation	Steps
From the symplr Provider toolbar	<ol style="list-style-type: none"> 1. Open a form. 2. On the symplr Provider toolbar, click Admin. 3. Select Set Security.
From search results	<ol style="list-style-type: none"> 1. Search for a form. 2. In the Search Results, locate the form, then click Edit Security .

2. In the **User Group** grid, select the user group.
 - a. Optionally, you can add a user group to the **User Group** grid by completing the following substeps.
 - i. Click **Add** .
 - i. In **Add User Groups**, select one or more user groups, then click **OK**.
 - ii. Click **Save**.

Tip

To manage field-level access to attachments, see [Manage field level access](#) (below)

Manage field level access

You can add and remove field-level access to form fields and attachment fields. This allows you to assign read or write access, or even hide a field from a group of users.

Prerequisite

Open a form in security setup mode.

For forms, see [Set access to form fields](#) (on the previous page).

For attachments, see [Set access to attachments](#) (on the next page).

Add field level access

1. At the top right of the form, select one of the following options from the  dropdown.

Option	Description
 Off	Field editing is turned off.
 Write	Assigns write access; paints selected field green.
 Read	Assigns read access; paints selected field yellow.
 Hidden	Hides field (or entire section) from selected user group; paints the field red.
 Undefined	Default setting; paints field gray.

2. To assign the selected access to a field, select a field to paint it, then continue selecting all fields that should have the same option.
3. Repeat the process for each option you wish to set or change.
4. To hide an entire section (including fields) from a user, paint the section header as hidden.
 - Painting section headers with any other option does not affect field access in those sections.
5. Click **Save**.

Remove field level access

1. To remove all security right assignments from a field, select  **Undefined** and paint the field gray.

- In the User Group grid, use the check boxes to assign access rights for each field.

Note

Any fields marked **Undefined** assume the access right settings as defined in the grid. Fields with a field-level security setting of Undefined may be hidden from the user's view by selecting **Hide undefined** as part of the **Edit field access** settings.

- Click **Save**.

Set access to attachments

You can restrict a user group's access to view and edit form attachments. To manage security settings for attachments, complete the following steps.

Note

The security rights granted to a symplr Provider user group for one form apply to all attachments attached to all forms in symplr Provider.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to set security for attachments.

- To begin, you must first open the form in security setup mode. To open a form in security setup mode, complete the following steps depending on the situation.

Situation	Steps
From the symplr Provider toolbar	<ol style="list-style-type: none"> Open a form. On the symplr Provider toolbar, click Admin. Select Set Security.
From search results	<ol style="list-style-type: none"> Search for a form. In the Search Results, locate the form, then click Edit Security .

- In the **User Group** grid, select the user group.
 - Optionally, you can add a user group to the **User Group** grid by completing the following substeps.
 - Click **Add** .
 - In **Add User Groups**, select one or more user groups, then click **OK**.
 - Click **Save**.

Tip

To manage field-level access to attachments, see [Manage field level access](#) (on the previous page)

Maintenance

symplr Provider offers several maintenance options managing your system and system performance.

[Manage system scheduled tasks](#) (below)

[Merge institution records](#) (on page 235)

[Update area codes](#) (on page 235)

[Manage audit log](#) (on page 236)

[Import / export files between databases](#) (on page 237)

[Manage the event viewer](#) (on page 238)

[Flat file filters](#)

[Update provider display order](#) (on page 241)

[Manage Quick Launch](#) (on page 241)

[Reference lists](#) (on page 243)

Manage system scheduled tasks

System scheduled tasks are provided by symplr and included in the symplr Provider Data Requirements package. These system tasks are set to run on a particular schedule that meets the needs of most clients; however, the default settings may be adjusted with the assistance of symplr, if necessary. You can edit, run, or inactivate system scheduled tasks.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to manage system scheduled tasks.

Edit a system scheduled task

- . To edit a system scheduled task, complete the following steps.
 1. Open the **System Scheduled Tasks** system form.
 2. In the grid, select the task, then click **Edit trigger** .
 3. Optional. In the **Settings** section, select additional parameters for the scheduled task, such as a recurrence expiration date.

4. In the **Recurrence** section, click on the desired recurrence frequency. Then select the options for that frequency.
 - a. **One Time** - Under **Summary**, select a start date.
 - b. **Daily** - Select the number of days the task should recur.
 - c. **Weekly** - Select how often the task should occur in weeks, then select which days of the week to run.
 - d. **Monthly** - Select which months the task should run, and whether the task should run only on weekdays. Then select specific calendar run dates for your selections.

Note

If you select weekdays and a selected date occurs on a weekend, the task will run on the nearest weekday. In other words, tasks scheduled for Saturday will run on the Friday before, and tasks scheduled for Sunday will run on the next day.

5. Optional. To repeat the task multiple times per scheduled recurrence, in **Repeat multiple times each recurrence**, select the frequency and duration.
6. Click **OK**.
7. Click **Save**.

Run a system scheduled task

To run a system task manually, outside of its existing schedule, complete the following steps.

1. Open the **System Scheduled Tasks** system form.
2. In the grid, select the task, then click **Run task now** .
3. In **Run Task**, click **Yes** to run the task immediately.
 - Running the task may take a few minutes. Once the task is complete, you will be returned to the **System Scheduled Tasks** grid.

Inactivate a system scheduled task

To inactivate a system scheduled task, complete the following steps.

Warning!

Inactivating a system scheduled task may effect the functionality of other symplr Provider features. Please consult with symplr prior to inactivating a system scheduled task.

1. Open the **System Scheduled Tasks** system form.
2. In the grid, select the task, then click the **Edit trigger** button .
3. In **Edit Trigger Definition**, in the **Summary** section, clear the **Active** check box.
4. Click **OK**.
5. Click **Save**.

Merge institution records

To eliminate duplicate institution records, you can use the **Institution Merge Utility** system form to automatically merge multiple institutions into a single institution. First you filter institutions by one of several fields (such as name, address, email), then you select the institutions to merge from the filtered list.

To merge institution records, complete the following steps.

You must have the required [symplr Provider security](#) (on page 225) to merge institution records.

1. Open the **Institution Merge Utility** system form.
2. In the **Potentially Duplicate Institutions** grid, select a column header to filter the records.
 - The grid will display the field with the number of potential duplicates.
3. Select one or more records in the grid.
 - As you select records, the potential duplicates are added to the Results grid.

• **Note**

To optimize performance, phone and fax numbers appear without formatting.

4. In the **Results** grid, review the filtered record results.
 - To view record detail before merging, select a single record, then click **View Details** .
5. In the **Results** grid, select one or more records to merge, then click **Merge**.
6. In **Select Target Institution**, select the institution record to keep, then click **Merge**.
 - Your changes are automatically saved, and the merged institution is automatically removed from the database.

Update area codes

When an area code changes, running the **Area Code Update** utility quickly updates all affected phone numbers in symplr Provider. To mass update area codes, complete the following steps.

You must have the required [symplr Provider security](#) (on page 225) to run this utility.

Area code information should be updated with caution. All phone numbers in symplr Provider, Group Addresses, Addresses, and Institutions are directly affected when running this utility.

1. Open the **DBA Utilities** system form.
2. In the **Database Administration** section, click **Area Code Update**.
3. In the **Update Area code** stepper, complete each step as instructed on screen. (See [Steppers](#) (on page 118))
4. After the utility has run, close the **DBA Utilities** work item.

Manage audit log

symplr Provider allows you to set both the audit tracking level and user group access of work item types.

Set audit tracking level

1. Open the **Files - Master Setup** form.
2. Select the tab for the type of item to audit, then select the item to edit.
3. Click **View Details** .
4. In the detail section, select an option from **Auditing Status**.
 - **Disabled** - No changes are tracked.
 - **Field Level** - symplr Provider records the date the field was changed, the user who made the change, and information about the change.
 - **Record Level** - symplr Provider records the date the record was changed and the user who made the change.
5. Click **Save**.

Set user group access to audit log

To set a user group's access to the audit log for a selected file, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to set user group access to the audit log.

1. Open the **Entities - Master Setup** system form.
2. In the **File Setup** section, select the tab for the file type.
 - a. In the **File** grid, select the file.
 - b. In the **User** grid, select the user group.
3. Optional. To grant the selected user group access to the audit log for the selected file, select the **Audit Log** check box.
4. Optional. To deny the selected user group access to the audit log for the selected file, clear the **Audit Log** check box.
5. Click **Save**.

Database utilities

symplr Provider provides several database utilities for administrators in the DBA Utilities system form as well as information on Privileging Library data updates and some profile template actions.

The Database Administration section contains a series of buttons. Simply click the appropriate button and respond to any prompts to perform the action. A message will appear at the top of the window to indicate when an action has been completed.

The following list outlines the available actions, depending on your security rights.

Button	Description
Optimize Database	Optimizes the database by cascading deletes.
Area Code Update	Mass updates area codes based on the information you provide in the Update Area Code modal.
Update CPT/ICD Codes	Coming soon
Truncate Event Log	Recover database space by deleting event information. You can delete all events, or select a time range in months.
User Group Security Copy	Copies user group security settings from one group to another based on the information you provide in the User Group Security Copy modal.
Update Provider Display Order	Updates the provider display order for all providers.
Database Sync	Manually syncs the database with PPR and Peer Review.
Update License Cache	Immediately forces synchronization between the customer license system cache and symplr's internal cache.

The profile Templates section contains a grid that allows you to add, removed, and download profile templates.

Import / export files between databases

To copy a query, document, report, or profile from one symplr Provider database to another you first export the file from the source database, then import it into the target database.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to complete this task.

1. Export a file

- a. Open the file you want to export.
- b. On the **Toolbar** (on page 19), click **More**, then click **Export**.
- c. In the bottom left of your screen, click the file link option arrow to manage the item. Alternatively, you can manage the file in the Windows download folder.

2. Open the second instance of Cactus that is linked to a different database.

3. Import a File

- a. In the **Home** hub, click **Create New** , then select the file type that matches the file exported from the source database.
- b. In the **Create New** box, select the type of file you will be importing (e.g., Query, Document, Report, Profile).
- c. On the **Toolbar** (on page 19), click **More**, then click **Import**.

4. Locate and select the file you want to import, then click **Open**.

5. To verify the import, click **Yes**.

- The file is imported and saved as a new work item.

Tip

When you import a file in this manner, you create a new, blank work item, then the import creates (and saves) another work item with your imported data. You can close the blank work item without saving.

Manage the event viewer

The **Event Viewer** system form displays events, such as errors, unhandled exceptions, warnings, login attempts (including the username and IP address used (SaaS only), and informational messages originating from any service within symplr Provider. Though the information displayed is "read-only," it may be sorted to display events of a particular type and relating to a specific symplr Provider form. You can view the event log and truncate event information.

View event information

To view event information, complete the following steps.

1. Open the **Event Viewer** system form.
2. To view details about an event, select a row in the grid, then click **View Details** .
3. Optional. To change the columns in the grid view, click **Manage Columns**.
 - a. Select any additional items to show in the grid.
 - b. Deselect any items to remove from the grid view.
 - c. Click **Refresh** to see your changes.

Tip

As with any grid, you can filter the results by field and rearrange the field order. (See [Grids](#) (on page 120))

Truncate the event log

Running the **Truncate Event Log** utility allows you to recover database space by deleting event log information. To run the utility, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to run this utility.

Warning!

Running the truncate event log utility will result in data being permanently deleted. Please contact [symplr Provider support](#) to with any questions or concerns.

1. Open the **DBA Utilities** system form.
2. In the **Database Administration** section, click **Truncate Event Log**.
3. In **Truncate Event Log**, complete one of the following substeps.
 - a. To remove all event log information from the database, select **Truncate all event information**.
 - b. To remove older event log information, select **Select Time Range**, then enter the number of months to retain.
 - The system will retain the most recent months based on your selection.
 - c. Click **OK**.
4. To confirm the action, click **Yes**.

Flat file filters

A flat file filter consists of a filter expression (brief SQL statement) designed to limit the types of records that are exported to a flat file. Flat file filters are the “criteria” of a flat file. For example, when exporting address information, without a filter condition, the file produced will contain all address record types (primary, billing, home, etc.). Placing a filter on the flat file will allow you to limit the export to a specific record type, such as primary address.

Though [symplr Provider](#) provides flat file filters for basic demographic information such as, addresses, licenses, and specialties, these existing filters can be customized and additional filters added via the Flat File Filter Setup system form.

Note

Prior knowledge of the symplr Provider database and SQL statements is necessary to create filter expressions.

Create a new flat file filter

To create a new flat file filter, complete the following steps.

1. Open the **Flat File Filter Setup** system form.
2. Select one of the following methods to create a new flat file filter.

Create a new filter

- a. Switch to Detail view.
- b. On the toolbar, click **New**.
- c. In **Create New Filter**, select a parent node or filter for the new filter, then click **OK**.
 - When you expand nodes, you can see existing filters in bold.
 - You can hover over each entry to see more detail about the item.
- d. In Flat File Filter Setup, enter any information needed in **Filter Description**, **Extended Description**, and **Filter Expression**.
 - A **Filter Description** is required.

Create a new filter from an existing filter

- a. In List view, select a filter, then switch to Detail view.
 - b. Click **Copy Filter**.
 - c. In **Copy Filter**, accept the defaults, or enter a new **Filter Description** and **Extended Description**, then click **OK**.
 - The new filter becomes the active work item.
3. Click **Save**.

Manage flat file filters

You can edit, inactivate, and delete flat file filters.

Edit an existing flat file filter

To edit an existing flat file filter, complete the following steps.

1. Open the **Flat File Filter Setup** system form.
2. In List view, highlight the filter to edit, then switch to Detail view.
3. Make any edits, then click **Save**.

Inactivate a flat file filter

To inactivate a flat file filter, complete the following steps.

1. Open the **Flat File Filter Setup** system form.
2. In List view, highlight the filter to inactivate, then deselect **Active** for that filter.
3. Click **Save**.

Delete a flat file filter

1. Open the **Flat File Filter Setup** system form.
2. In List view, highlight the filter to delete, then click **Delete**.

Update provider display order

Sometimes, when running a query or report, providers may appear slightly out of order. Running the **Update Provider Display Order** utility corrects this issue by reordering the Providers table. To run the utility, complete the following steps.

Note

- You must have the required [symplr Provider security](#) (on page 225) to run this utility.
- The utility may take several minutes to complete.

From the DBA Utilities form

1. Open the **DBA Utilities** system form.
2. In the **Database Administration** section, click **Update Provider Display Order**.
3. In **Update Provider Display Order**, click **Confirm**.

From the System hub

1. In the left pane, click System.
2. Click **Update Provider Display Order**.
3. In **Update Provider Display Order**, click **Confirm**.

Tip

The **Update Provider Display Order** utility may be set up to run on a recurrent basis. See [Manage system scheduled tasks](#) (on page 233) for instructions.

Manage Quick Launch

The Quick Launch list displays frequently-used forms. The forms displayed in the Quick Launch list, and the order in which they are displayed, is determined by your symplr Provider System Administrator.

Clicking an item in the Quick Launch list opens the corresponding form.

Add a form to the Quick Launch

To add a form to the Quick Launch, complete the following steps.

Note

Provider-centric forms added to the Quick Launch will also be available as sections in the Provider Summary form.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to add a form to the Quick Launch.

1. Open the **Entities - Master Setup** system form.
2. In the **Quick Launch** section, in the grid, click **Add** .
3. In **Add Data Forms**, select the one or more forms, then click **OK**.
 - The form will be added to the grid and appear within the **Quick Launch**.
4. Click **Save**.

Update Quick Launch form sort order

To update the order in which forms appear in the **Quick Launch**, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to update the order of Quick Launch forms.

1. Open the **Entities - Master Setup** system form.
2. In the **Quick Launch** section grid, click **Sort Forms** .
3. In **Update Sort Order**, complete any of the following substeps.
 - Click **Sort by Alpha**  once to sort in ascending order, and twice to sort in descending order.
 - Select an item in the list then click **Move to Top** or **Move to Bottom** to move the item to the beginning or end of the list.  
 - Hover over the item to move until you see the drag-and-drop crossed double arrows , then drag and drop the item to the desired location.
4. Click **OK**.
5. Click **Save**.

Remove a form from Quick Launch

To remove a form from the **Quick Launch**, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to remove a form from the Quick Launch.

1. Open the **Entities - Master Setup** system form.
2. In the **Quick Launch** section grid, select the form to be removed, then click **Remove** .
3. Click **Save**.

Reference lists

Many forms in symplr Provider include drop downs or list fields that are attached to a reference list. When you click on one of these fields, you can select a item from the list to include in the form. With the proper credentials, you can customize these lists to fit the policies and practices of your organization. This includes such activities as managing the list contents, merging list values, and more.

Reference lists open in list view. List View is a grid, so you can filter and sort the records. You can also add and edit a reference list in this view, or switch to detail view in the toolbar.

Manage form and reference list view

Both form list view and reference list views allow you to edit records directly in the list and also manipulate field columns. You can sort and filter by column, select the visible fields in list view, and change the order they display.

Note

Many forms contain child grids within form sections. These child grids cannot be managed in form list view.

Edit a field

Click in the cell you want to change. You will either be presented with a list of options or will be able to type in your information.

Add or Remove a field from view

When you add or remove a field from list view, you are selecting which fields are visible in the list view.

1. To add or remove a field, click **Manage Columns**.
2. Select the items to show in the grid.
3. Deselect the items to remove from the grid view.

4. Click **Refresh** to see your changes.
 - Added fields are appended to the end of column list.

Tip

When you click Select All in Manage Columns, the resulting behavior depends on the initial state of the columns.

Column status	Result when Select All checked
Some columns pre-selected	All columns appear in grid, with newly added appearing at the end.
All columns pre-selected	All columns become deselected.
No columns selected	All columns selected and added to grid in alphabetical (default) order, or in the order they were placed by the user previously.

Move a column

To rearrange the columns, drag-and-drop a column header to the new location in the list. Repeat for each column you wish to move.

Sort a column

To sort a column, click the column header of the column to sort. Click again to reverse the sort order.

- Directional arrows appear in the header you are sorting to indicate ascending or descending sort order.

Filter a column

1. To filter a column, in the column header, click Filter .
2. Enter the criteria for your filter, then click **Filter**.
 - The criteria selection will vary depending on the type of field selected.
 - You can filter one or more columns at a time.
 - Filtered columns are indicated by a reverse background Filter .
3. To clear a filter, click Filter , then click **Clear**.

Edit an existing reference list

To edit an existing reference list, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to edit a reference list.

1. Complete one of the following steps, depending on the situation.

Situation	Steps
A form	<ol style="list-style-type: none"> 1. Search for an item (on page 18) and navigate to the drop-down list containing the reference list value you want to edit. 2. On the Toolbar (on page 19) click More, then Field Action. 3. Next to the list containing the reference list value to edit, click the 3-dot menu , then Edit.
Global Search box	<ol style="list-style-type: none"> 1. In the Global Search box, click the down arrow and select Reference Lists. 2. Type the name of the reference list you want to edit and press Enter. 3. In the Search Results, click on the reference list.

Note

Reference lists open in list view. To return to detail view, on the [Toolbar](#) (on page 19), click the detail/list view toggle .

2. On the [Toolbar](#) (on page 19), use record navigation  to locate the value you want to edit.
3. Edit the reference list as desired.
4. Click **Save**.

Tip

Like some form grids, you can mass update the Assignment Type reference list. (See [Mass edit select grids](#) (on page 123))

Manage reference list values

Add a value to a reference list

To add a value to a reference list, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to add a value to a reference list.

1. Complete one of the following steps, depending on the situation.

Situation	Steps
A form	<ol style="list-style-type: none"> 1. Search for an item (on page 18) and navigate to the drop-down list containing the reference list value you want to edit. 2. On the Toolbar (on page 19) click More, then Field Action. 3. Next to the list containing the reference list value to edit, click the 3-dot menu , then Edit.
Global Search box	<ol style="list-style-type: none"> 1. In the Global Search box, click the down arrow and select Reference Lists. 2. Type the name of the reference list you want to edit and press Enter. 3. In the Search Results, click on the reference list.

2. On the [Toolbar](#) (on page 19), click **New**.

Note

If the reference list opens in list view, on the [Toolbar](#) (on page 19), click the detail/list view toggle  to return to detail view.

3. In the boxes, type the appropriate information.
4. Click **Save**.

Inactivate a reference list value

To inactivate a reference list value, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to inactivate a reference list.

1. Open the reference list containing the value you want to inactivate.
2. Deselect **Active** for the reference list value to inactivate.
3. Click **Save**.

Delete a reference list value

To delete a reference list value, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to delete a reference list value.

Note

To maintain data integrity, symplr recommends you inactivate a reference list value instead of deleting it.

1. Open the reference list containing the value you want to delete.
2. Select the value to delete.
3. On the [Toolbar](#) (on page 19), click **Delete**.
4. To confirm deletion, click **Yes**.
5. Click **Save**.

Note

You can mass update the Officers grid in the Assignment Types reference list. (See [Mass edit select grids](#) (on page 123))

Merge reference list values

When you need to replace one reference list value with another, you can use the Merge Values feature in symplr Provider to replace the value automatically, instead of manually updating each provider record. To merge reference list values, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to merge reference list values.

1. Complete one of the following steps, depending on the situation.

Situation	Steps
A form	<ol style="list-style-type: none"> 1. Open a form that contains a list you wish to edit. 2. On the Toolbar (on page 19) click More, then Field Action. 3. Next to the list containing the reference list value to edit, click the 3-dot menu , then Edit.
Global Search box	<ol style="list-style-type: none"> 1. In the Global Search box, click the down arrow and select Reference Lists. 2. Type the name of the reference list you want to edit and press Enter. 3. In the Search Results, click on the reference list.

2. If the new value has not yet been created, see [Manage reference list values](#) (on page 245).
3. On the symplr Provider toolbar, click **More** and select **Merge**.
4. To merge reference list values, in **Merge ... Values** complete the following sub-steps.
 - a. Select the check box next to one or more values you want to replace.
 - b. In the **Replacement value** list, click and select the value to replace the selected.
 - The list includes all the reference list values not selected above.
 - c. Click **Merge**.
5. Click **Save**.

Update reference list sort order

To update the order in which values appear in your reference list, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to update the sort order of a reference list.

Note

Two or more reference list values are required to enable the update sort order functionality.

1. Complete the following steps, depending on the situation.

Situation	Steps
A form	<ol style="list-style-type: none"> 1. Search for an item (on page 18) and navigate to the drop-down list containing the reference list value you want to edit. 2. On the Toolbar (on page 19) click More, then Field Action. 3. Next to the list containing the reference list value to edit, click the 3-dot menu , then Edit.
Global Search box	<ol style="list-style-type: none"> 1. In the Global Search box, click the down arrow and select Reference Lists 2. Type the name of the reference list you want to edit and press Enter. 3. In the Search Results, click on the reference list.

2. On the symplr Provider toolbar, click **More**, then select **Update Sort Order**.
3. In **Update Sort Order**, complete any of the following sub-steps.
 - Click **Sort by Alpha**  once to sort in ascending order, and twice to sort in descending order.
 - Select an item in the list then click **Move to Top** or **Move to Bottom** to move the item to the beginning or end of the list.  
 - Hover over the item to move until you see the drag-and-drop crossed double arrows , then drag and drop the item to the desired location.
4. Click **OK**.
5. Click **Save**.

Create an assignment type

If your system has been configured to privilege by assignment, then assignments (departments) must be set up prior to creating privileges in symplr Provider. These assignments (departments) are created in the **Assignment Types** reference list. To create an assignment type, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to create or edit a reference list.

1. Open the **Assignment Types** reference list.
2. If no **Assignment Type** records have been created click the **Create New Record** link, otherwise, on the [Toolbar](#) (on page 19), click **New**.

Note

If the reference list opens in list view, on the [Toolbar](#) (on page 19), click the detail/list view toggle  to return to detail view.

3. In the **Assignment Types** section, in the boxes provided, type the appropriate information.
4. Optional. To add officers, complete the following substeps.
 - a. Expand the **Officers** section, then click **Add** .
 - b. In the **Select Provider**, find and select a provider.
 - c. Highlight the new provider in the grid, then click Show Details .
 - d. Edit the fields as needed.
 - If the officer is going to be participating in Committee Manager reviews, select the **Reviewer** check box.
5. Click **Save**.

Tip

Assignment Types that are no longer being used should be inactivated, not deleted.

Create a specialty

If your system has been configured to privilege by specialty, then specialties must be set up prior to creating privileges in symplr Provider. These specialties are created in the **Specialty** reference list. To create a specialty, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to create or edit a reference list.

1. Open the **Specialty** reference list.
2. If no **Specialty** records have been created click **Create New Record**, otherwise, on the **Toolbar** (on page 19), click **New**.

Note

If the reference list opens in list view, on the **Toolbar** (on page 19), click the detail/list view toggle  to return to detail view.

3. In the **Specialty** section, in the boxes provided, type the appropriate information.
4. Optional. To link a board to the specialty, see steps **3** and **4** of the [Link a board to a specialty](#) (on the next page) topic.
5. Click **Save**.

Create a practice area

If your system has been configured to privilege by practice area, then practice areas must be set up prior to creating privileges in symplr Provider. These practice areas are created in the Practice Area reference list. To create a practice area, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to create or edit a reference list.

1. Open the **Practice Area** reference list.
2. If no **Practice Area** records have been created click **Create New Record**, otherwise, on the **Toolbar** (on page 19), click **New**.

Note

If the reference list opens in list view, on the **Toolbar** (on page 19), click the detail/list view toggle  to return to detail view.

3. In the **Practice Area Maintenance** section, type the appropriate information.
4. Optional. To associate assignments (departments) to the practice area, complete the following substeps.
 - a. In the **Associated Departments** section grid, click **Add** .
 - b. In **Add Assignment Types**, select one or more departments to associate with the practice area, then click **OK**.
5. Optional. To associate specialties to the practice area, complete the following substeps.
 - a. In the **Associated Specialties** section and, in the grid, click **Add** .
 - b. In **Add Specialties**, select one or more specialties to associate with the practice area, then click **OK**.
6. Click **Save**.

Link a board to a specialty

Your organization may choose to link boards to your specialty list to enhance the data-entry process. To link a board to a specialty, complete the following steps.

You must have the required [symplr Provider security](#) (on page 225) to edit a reference list.

1. Open the **Specialty** reference list.
2. Select a specialty, and switch to detail view to edit.

Note

If the reference list opens in list view, on the **Toolbar** (on page 19), click the detail/list view toggle  to return to detail view.

3. To link a board to the specialty, complete the following substeps in detail view.
 - a. In the **Boards** section grid, click **Add** .
 - b. In the **Select Specialty Boards**, search for and select one or more specialty boards, then click **OK**.
4. Click **Save**.

Interface cross reference

symplr Provider provides Interface Cross Reference to give you with the flexibility to import data into, or export data from your symplr Provider database without the intervention of a symplr representative.

Interface Cross Reference is available for reference lists, a select number of forms (F:Institutions and F:Providers), and primary tables only. When available, you can access Interface Cross Reference on the toolbar under More.

Prerequisite

You must have rights to S:Interface Cross Reference and S:Interface Cross Reference Viewer to access Interface cross reference.

This viewer allows you to relate a value coming in or going out, such as the description of a Specialty, to a value (Primary Key) in symplr Provider. This offers you the ability to import or update without matching on descriptions, for example, "Anesthesiology" versus "Anesthesia," or send a value out to another system so that it doesn't have to match.

Interface Cross Reference is used primarily when cross referencing reference list values, such as boards, specialties, license types, etc.

Create an interface cross reference

To cross reference a symplr Provider reference list value with an interface system value, complete the following steps.

Example

You need to cross reference a value from the symplr Provider **Specialty** reference list (Anesthesia) with a value in the CAQH Manager interface system (Anesthesiology)

1. Open a reference appropriate form that allows interface cross references.
2. In the grid, select the symplr Provider specialty you want to cross reference.
3. On the [Toolbar](#) (on page 19), click **More**, then select **Interface Cross Reference**.

Tip

The toolbar selection will only be visible if you have the correct security rights and a form that allows cross-referencing is in focus.

4. In the **Interface Cross Reference** viewer, complete the following substeps.
 - a. To load the reftable, click **Add** .
 - The appropriate reftable will be automatically loaded.
 - b. In **Interface Value**, type the value within the interface that will be cross referenced with the value you've selected in the reference list.
 - c. In **Interface System**, select the appropriate interface system, for example "CAQH Manager."
 - d. Optional. To view the audit log for the item, click **Audit Log**.
 - e. Optional. To create a separate work item, click **Interface Systems**.
 - f. Click **Save**.

Support mode

In order to assist in the resolution of issues you may be experiencing, a support team member may need to remote in to your workstation and navigate through symplr Provider while in Support Mode.

The support team member will open a support ticket through the Support tab under Help > About.

You can exit support mode at any time by:

- Clicking Deactivate on the Support tab.
- Closing or refreshing your browser.
- Logging off of symplr Provider.

Optional modules

Multiple modules to the symplr Provider system are offered by symplr to further enhance the client credentialing experience. These optional modules are described in the following table.

Optional modules

Module	Description
Affiliation Letters	Affiliation Letters allows you to respond online to outside organizations requesting verification of providers in good standing on your medical staff. The requesting organization may even print a verification letter on customized letterhead with their name, address, and a signature.
Application Manager	Application Manager is an online system allowing applicants to complete documents required for initial or re-appointment to hospitals and managed care organizations via a secure website. Applicants access a web browser from any location to submit their applications, documents, and copies of licensure. Application Manager streamlines the credentialing process so that you and your providers can be more productive and profitable.
CAQH Export	CAQH Export interfaces directly with the Council for Affordable Quality Healthcare (CAQH) provider credentialing application and your symplr Provider database. It enables enhanced data population during the application fulfillment process.
Committee Manager	Committee Manager facilitates traditional committee review by electronically organizing and displaying provider credentials data to Reviewers. A Reviewer can open his or her work queue, review candidate profiles, and make a recommendation all within the Committee Manager interface.
Contract Manager	The Contract Manager allows an unlimited number of contracts and providers to be managed from one location. For example, you can track providers' relationships with a given contract, status, category, enrollment dates, and termination date/reason. Like many other symplr Provider forms, your organization can specify if or how to utilize the user-defined data fields to track additional information important for your enrollment process.
License Monitor Viewer	License Monitor Viewer assists healthcare organizations with the maintenance of physician DEA and most state-specific licensing information. This module monitors changes to officially published provider licensing data and posts expiration date updates as well as an image of the web site into the provider's license record in symplr Provider.

Module	Description
Pharmacy Lookup	Pharmacy Lookup allows pharmacies to search your symplr Provider database via the Intranet, or Internet, to ensure the accuracy of provider signatures, DEA schedules, and licensure. All providers matching the search criteria entered are displayed along with brief demographic details. Pharmacy Lookup users may then select the desired provider to view additional detail, including signatures, DEA schedules and license images, for verification purposes.
Provider Directory	The Provider Directory enables you to make information about your providers available on the Internet or your organization’s Internet for potential patients to search when choosing a healthcare provider. Users can search for providers by any combination of available professional information such as practice specialties, office location, or even languages spoken by the provider. The provider information displayed is securely controlled by the configuration settings in symplr Provider and only the provider information designated to be displayed will be made available to Provider Directory users.
Scheduler	The Scheduler allows users to schedule reports, documents, and packets to be run at a specified date and time, for example, on a nightly, weekly, or monthly basis, and all from within the symplr Provider user interface.

Affiliation Letters

Affiliation Letters automate the task of responding to outside organizations requesting verification of providers in good standing on your medical staff. The requesting organization may even print a verification letter on customized letterhead with their return address information, as well as your organization's name, address, and a signature. All inquires are tracked in the audit log.

Manage access to Affiliation Letters

If no auto-activation settings are enabled in the Affiliations Letters [Configure Affiliation Letters](#), in order for an individual to search the Affiliation Letters, they must first be granted access to the product via the Affiliation Letters Configuration system form in symplr Provider. To manage user access to Affiliation Letters, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to manage user access to Affiliation Letters.

Add a user

To add a user, complete the following steps.

1. Open the **Affiliation Letters Configuration** system form in sympplr Provider.
2. In the **Users** section, complete the following substeps.
 - a. To add a new record in the grid, click **Add** .
 - b. To open user details below the grid, click **View Details** .
 - c. In the boxes provided, enter information about the user.
 - The User Group list allows you to select from existing groups.
 - Once you enter an email address, you can click  to email the user.
 - d. Click **Save**.

Remove user access temporarily

You can remove access in either grid or detail view. To temporarily remove a user's access to Affiliation Letters, complete the following substeps.

1. Deselect **Active** for the user.
2. Click **Save**.

Remove user access permanently

To permanently remove a user's access to Affiliation Letters, complete the following substeps.

1. In the grid, select the row of the user that should no longer be able to access Affiliation Letters.
2. Click **Remove** .
3. Click **Save**.

Note

The user will not be able to access Affiliation Letters, unless they are once again added to the Users grid, or if auto-activation has been enabled and they register again through the website.

Application Manager

Prerequisite

An additional license is required to use this module/add-on.

If your organization has licensed the Application Manager module, please reference the user help accessible from within the module for a comprehensive guide to its features and suggested use.

Application Manager is an online system allowing applicants to complete documents required for initial or re-appointment to hospitals and managed care organizations via a secure website. Every document

involved in an employment application process, a provider appointment/reappointment process, or any other kind of process may be passed between the applicant and the organization via Application Manager without mailing any document hard copies.

There are several areas within symplr Provider that interface directly with Application Manager. These are briefly described in the following table.

Form/Tab/Folder	Description
Application Manager (form)	If you have licensed the Application Manager module, you can access it directly from within symplr Provider by clicking on the Application Manager form.
Application Manager Processes (form)	The Application Manager Processes form provides access to any document within the selected process. This form can be opened from the Application Manager tab found within the entity tab of the Providers form.
Application Manager Configuration (System form)	Prior to using Application Manager through symplr Provider, several configuration settings must be in place. These settings are specified in the system form.
Application Manager Users (System form)	The Application Manager Users system form is used to grant current symplr Provider users access to Application Manager. Once the users have been successfully added, they will be available for selection and can be assigned to various tasks in Application Manager.
Application Manager tab (found on entity tab of Providers form)	As the provider is processed through the Application Manager module, various elements related to the process can be monitored from the Application Manager tab found within the entity tab of the Providers form. The selected provider may also be added to additional Application Manager processes via this tab.
Application Manager tab (found on Credentialing / Verification form)	The Application Manager tab found on the Credentialing / Verification form is used to manage any Application Manager process associated with the provider's credentialing instance. Once the Application Manager process has been completed, all documents and applications sent between the provider and the credentialing specialist will appear in this view.

Application Manager Processes

The Application Manager Processes form is used for initially enrolling providers in a process. After providers have been enrolled in a process, this form can also be used for monitoring various properties related to the provider and their active process(es).

The form is divided into two sections. The left side of the form displays the Application Manager processes available for filtering and selection. The right side of the form contains a grid displaying properties related to each provider's process. These properties are described in the following table.

Property	Description
Provider	The name of the provider involved in the process. A provider can belong to one or more processes.
Email	The provider's email address. In order for a provider to be associated with an Application Manager process and receive email correspondence from Application Manager, they must have a valid email address.
Process	Displays the name of the Application Manager process set up in Application Manager and to which the provider has been added.
Status	Displays the status of the Application process, for example, "Not uploaded," "Inactive," "Ongoing," "Terminated" and "Completed."
Documents	Represents the number of documents the provider has completed for the selected process.
Requested	The date the provider was added to the process.
Activated	The date the provider activated the process by successfully signing into Application Manager.
Sync Date	The date the last sync between symplr Provider and Application Manager occurred.
Entity	The entity associated with the provider's process.

Note

If a provider is enrolled in more than one process, the provider will have an entry in the grid for each process.

Form display options

There are several ways to display information in the Application Manager Console form.

- To quickly locate a particular Application Manager process, on the left side of the form, type the name of the process in the Filter Processes box.
 - The provider processes displayed in the grid will be filtered to show only those pertaining to the process entered.
- To display all provider processes, from the left side of the form select **Show All Processes**.
- To sort the provider's processes listed in the grid according to a single property, click on the appropriate property column header.
- To view additional details about a particular provider's process, in the grid, click **View**  to open the **Application Manager Process Details** form.

Note

A question mark  may be displayed in the grid to the left of a provider process entry. The question mark indicates the process was created in Application Manager but the associated provider is not currently identified with a provider in symplr Provider (i.e., there is no provider record in symplr Provider that matches the provider).

To remedy this issue, open the Application Manager Process Details form and manually link the provider's Application Manager process with the appropriate provider record in symplr Provider. If there is not provider record, you will need to create one before you can link to the process.

Add a provider to a process

When you add a provider to a process, a process invitation containing a link to the enrollment process is emailed to the provider. Select one of the following methods to add a provider to a process.

Add a provider from the Application Manager Processes form

Prerequisite

- A provider record must be created in symplr Provider prior to process enrollment in a process through the Application Manager Process.
 - Minimum field requirements: Provider Name, Email Address, and any required provider authentication information to use Application Manager (for example, DOB, SSN, NPI, etc.).

1. Open the **Application Manager Processes** form.
2. Select a process on the left side of the form.
3. In the grid, click **Add** .
4. In **Select Providers**, find and select one or more providers. (See [Find \(Select\) Modal](#) (on page 114))
5. Click **Save**.
After the provider has been added to the process, they will be sent a process invitation email. The email will contain a link to enroll in the process and create an account if they are new to Application Manager.

Add a provider from the Providers form

1. Open the **Providers** form of the provider you want to add to an Application Manager process.
2. Click the **Entity** tab, then the **Application Manager** sub-tab.
3. In the **Processes** grid, click **Add** .
4. In **Find Application Manager Process**, select a process, then click **OK**.
5. Click **Save**.

Add a provider using the Send To feature

Use the [Send To feature](#) (on page 103), you can add providers to processes from the following additional locations.

- the **Results** tab of a query
- the **Providers, Credentialing/Verification, Credentialing Group, Credentialing Manager, and Group Practices** forms

Remove a provider from a process

You can remove a provider from a process in the Application Manager Processes from.

1. Open the **Application Manager Processes** form.
2. Select a process on the left side of the form.
3. In the grid, select a provider, then click **Remove** .
4. Click **Save**.

CAQH Export

Prerequisite

An additional license is required to use this module/add-on.

CAQH export allows you to interact with the Council for Affordable Quality Healthcare (CAQH) credentialing database.

CAQH Export is an optional module that enables you to upload provider profile data to CAQH. Using the CAQH Export module, you have the option to export a CAQH bulk upload (including a variety of provider information) or a CAQH roster (including only provider names).

CAQH bulk upload

A [Export a CAQH bulk upload](#) (on page 263) is a pipe-delimited file consisting of symplr Provider provider data. The types of data included in the bulk upload may be customized using the CAQH Export Configuration system form. After the CAQH bulk upload has been exported via a symplr Provider query and submitted to CAQH, the data is staged in CAQH and the provider is invited to log on and import the data from the bulk upload, edit the data prior to importing, or reject the data.

CAQH roster

A [Export a CAQH roster](#) (on page 263) is a pipe-delimited file consisting of symplr Provider provider names. After the CAQH roster has been generated via a symplr Provider query and submitted to CAQH, an XML file is produced containing provider data and placed on the CAQH FTP site. Provider information, including attachments, is then returned from CAQH and brought back into symplr

Provider by way of the CAQH Manager.

CAQH and symplr Provider reference list values

The following symplr Provider reference list values are not required by CAQH for submission of provider data and will be left empty unless cross-referenced prior to submission. If you would like to cross reference these values to their corresponding CAQH value, please see [Interface cross reference](#) (on page 251).

symplr Provider Reference List	symplr Provider Field Name
Boards	ProviderBoards.Board_RTK
Education Degree Type	ProviderEducation.Degree_RTK
Education Dept/Specialty	ProviderEducation.Specialty_RTK
Insurance Coverage Type	ProviderInsurance.CoverageType_RTK
Provider Language Type	ProviderLanguage.Language_RTK
License Type	ProviderLicenses.License_RTK
License Status	ProviderLicenses.Status_RTK
Specialty	ProviderSpecialties.Specialty_RTK
Provider Ethnicity	Providers.Ethnicity_RTK

Configure CAQH Export

To configure symplr Provider for use in exporting provider data to CAQH, complete the following steps.

1. Open the **CAQH Export Configuration** system form.
2. In the **Configuration** section, in **Interface System**, select the desired interface.
3. Depending on the type of export, in the **CAQH Export Configuration** section, complete the following steps.

Export Type	Steps
<p>Import/Roster configuration</p>	<ol style="list-style-type: none"> 1. In the Organization ID box, type the ID on file with CAQH. 2. Optional. To use secure FTP, check Use SFTP and complete the following substeps. If you use SFTP and export the roster from query results or from a provider record, the export will be automatically uploaded to CAQH. <ol style="list-style-type: none"> a. In FTP Upload URL, type the URL of the FTP site assigned to you by the CAQH. b. In FTP Incoming Directory, type the directory for which the provider information will be assigned. c. In FTP Upload Port, type the port provided by CAQH. d. In Upload User ID and UploadPassword, type the user information issued to you by the CAQH.
<p>Bulk upload configuration</p>	<ol style="list-style-type: none"> 1. In Practice Management ID, type the ID on file with CAQH. 2. Optional. To use secure FTP, check UseSFTP and complete the following substeps. If you use SFTP and export the bulk upload from query results or from a provider record, the export will be automatically uploaded to CAQH. <ol style="list-style-type: none"> a. In FTP Upload URL, type the URL of the FTP site assigned to you by the CAQH. b. In FTP Incoming Directory, type the directory for which the provider information will be assigned. c. In FTP Upload Port, type the port provided by CAQH. d. In Upload User ID and UploadPassword, type the user information issued to you by the CAQH.

4. To map sympplr Provider reference list settings to CAQH, complete the following substeps for each grid you wish to update.
 - a. Next to the grid to update, click **Add** .
 - For example, in the **Education Program** section, In the **Professional School** grid, click **Add** .
 - b. In **Add CAQH Config Setting**, select one or more type, then click **OK**.
 - The type is added to the grid underneath the **Setting** column and the corresponding entity populated underneath the **Entity** column.
5. Repeat the above steps as needed for all the sections containing grids: **Education Program**, **Affiliation Type**, **License Type**, **Addresses Type**, and **Specialty Type**.
6. Click **Save**.

Export a CAQH bulk upload

To export provider data from symplr Provider into a CAQH bulk upload file, complete the following steps.

Note

If you use SFTP and export the bulk upload from query results or from a provider record, the export will be automatically uploaded to CAQH.

Prerequisite

[Configure CAQH Export](#) (on page 261).

1. To gather the symplr Provider provider data you want to send via FTP to the CAQH, complete the following steps, depending on the situation.

Situation	Steps
From the Results tab of a query, or from the following symplr Provider forms: Providers , Credentialing/Verification , Credentialing Group , Credentialing Manager , and Group Practices .	For specific steps, see the Use the Send To feature (on page 103).

Note

Depending on the number of providers, the bulk upload may take a few minutes to create.

2. If asked to open or save the **ProviderBulkUpload...** click **Save** to save the file to the default save location, or **Save as** to select a specific local or network drive location. The bulk upload will be saved as a .txt (Text Document) file. At this point, you may open and view the file if desired.

Export a CAQH roster

To export symplr Provider provider name information to a CAQH roster file, complete the following steps.

Note

If you use SFTP and export the roster from query results or from a provider record, the export will be automatically uploaded to CAQH.

Prerequisite

[Configure CAQH Export](#) (on page 261).

1. To add providers to the CAQH roster file, complete the following steps, depending on the situation.

Situation	Steps
From the Results tab of a query, or from the following symplr Provider forms: Providers , Credentialing/Verification , Credentialing Group , Credentialing Manager , and Group Practices .	For specific steps, see Use the Send To feature (on page 103).

Note
Depending on the number of providers, the roster generation may take a few minutes to process.

2. If asked to open or save the Provider Roster... click **Save** to save the file to the default save location, or **Save as** to select a specific local or network drive location.
 - The roster file will be saved as a .txt (Text Document) file. At this point, you may open and view the file, if desired.

Contract Manager

Note
An additional license is required to use this module/add-on.

The symplr Provider Contract Manager is an optional module that allows an unlimited number of contracts and providers to be managed from one location. For example, you can quickly enroll providers from a large group practice, IPA, or custom query and update all the providers at the same time. In addition, attributes may be collectively set for the contract on one form and update all participating providers simultaneously, or set the attributes of a contract or network for any number of providers at once.

Tip
Duplicate entries are allowed.

Create a contract

Contracts are values on the Assignment Types reference table. There are two methods to create a contract.

Method One: Create a contract outside of Contract Manager

1. Open the **Assignment Types** reference list.
2. [Create an assignment record](#) (on page 139).

Method Two: Create a contract in the Contract Manager and add providers

1. Open the **Contract Manager** form.
2. In **Select Contract**, click **New**.
3. In the **Contract/Plan** section, enter a short description, then click **Save**.
4. If there are no Providers in the selected network, click **Add Providers**.
5. In **Add Providers**, search for and select one or more providers, then click **OK**.
 - a. To acknowledge the addition, in **Add Providers Summary**, click **OK**.
 - b. To return to the Contract Enrollment form, in **Select Providers**, click **Close**.
6. Optional. To add additional information to the provider, see [Edit a provider's contract record](#) (on page 268).

Add providers to a contract overview

symplr Provider offers three methods for adding providers to a contract. To add providers to a contract, complete any of the following procedures.

Tip

You must save any records before sending the provider record to a contract.

- [Add providers from a query](#) (below)
- [Add providers from Global Search](#) (on the next page)
- [Add providers from the Providers form](#) (on the next page)

Add providers from a query

To add providers to a contract record from a query, complete the following steps.

1. Generate query results.
2. On the **Results** tab, click **Send To**, then **Providers**.
3. Click **Next**.
4. In **Send to** list, select **Contract Manager**, then click **OK**.
5. In **Select Contract**, select the desired contract, then click **OK**.
6. In **Send Providers to Contract Manager**, select **Add the provider to this contract**, then click **Save**.
7. In **Add Providers Summary** click **OK**.
8. Click the detail/list view toggle  to display all contracted providers in list view.
9. In the **Contract Manager** form, in the **Contract/Plan** section complete any of the following substeps.

- a. To filter the providers displayed by network, click **Filter**  in the Network column header and enter your criteria.
- b. To add additional providers to the contract, select **Add** .
- c. To remove the selected provider from the contract, select **Remove** .

Add providers from Global Search

To add a provider to a contract record from the Global Search box, complete the following steps.

1. Open the **Contract Manager** form.
2. In **Select Contract**, select or create a record.
 - To select an existing assignment type, select one from the list, then click **OK**.
 - To create a new assignment type, click **New**.
3. To associate a provider record, select one of the following options.
 - If there are no existing records, click **Add Providers**.
 - If there are existing records, on the toolbar, click **New**.
4. In **Add Providers**, search for and select one or more providers, then click **OK**.
5. In the **Contract Manager** form grid, complete any of the following substeps.
 - a. To filter the providers displayed by network, click **Filter**  in the Network column header and enter your criteria.
 - b. To add additional providers to the contract, select **Add** .
 - c. To remove the selected provider from the contract, select **Remove** .
6. Click **Save**.

Add providers from the Providers form

To add a provider to a contract record from the Providers form, complete the following steps.

1. Open the **Providers** form of the provider you want to add to a contract record.
2. Click , select **Contract Manager** from the list, then click **OK**.
3. In **Select Contract**, select a contract, then click **OK**.
4. In **Send Providers to Contract Manager**, select **Add the provider to this contract**, then click **Save**.
5. In **Add Providers Summary**, click **OK**.
6. Click the detail/list view toggle  to display all contracted providers in list view.
7. In the **Contract Manager** form, in the **Contract/Plan** section complete any of the following substeps.

- a. To filter the providers displayed by network, click **Filter**  in the Network column header and enter your criteria.
- b. To add additional providers to the contract, select **Add** .
- c. To remove the selected provider from the contract, select **Remove** .

Manage contract records

You can manage both provider contract records and contract records.

Prerequisite

You must have the required security rights to perform these procedures.

Open a provider contract record

1. Open the **Contract Manager (on page 264)** form.
2. In **Select Contract**, select the desired contract, then click **OK**.
3. Select a record from the list, then switch to detail view.

Inactivate a provider's contract record

To inactivate a provider's contract record, complete the following steps.

1. Open the **Contract Manager (on page 264)** form.
2. In **Select Contract**, select the desired contract, then click **OK**.
3. Select a record from the list, then switch to detail view.
4. In the **Provider/Contract Plan** section, deselect **Active** for the contract to inactivate.
5. Click **Save**.

Inactivate a contract

To inactivate a contract, complete the following steps.

1. Open the **Contract Manager (on page 264)** form.
2. In **Select Contract**, select the contract you want to inactivate, then click **OK**.
3. In the Contract/Plan section, deselect **Active Contract/Plan** for the contract to inactivate.
4. Click **Save**.

Delete a contract

To delete a contract, complete the following steps.

Note

To maintain data integrity, sympplr recommends you inactivate a contract instead of deleting it.

1. Open the **Contract Manager (on page 264)** form.
2. In the **Select Contract**, select the contract you want to delete, then click **OK**.
3. On the sympplr Provider toolbar, click **Delete**.

Warning!

Once you click **Yes** to confirm deletion, the contract, and all corresponding provider assignment records in all networks, will be deleted. Once confirmed, the deletion cannot be undone.

4. To confirm deletion, click **Yes**.
5. To delete and save the record, click **Yes**

Edit a provider's contract record

To edit a provider's contract record, complete the following steps.

Note

Some of the following boxes and lists may be hidden from view as per your organization's specific use of the form.

1. In the **Contract Manager** form in detail view, in the **Provider Contract/Plan** section complete any of the following substeps.
 - a. In **From** and **To**, enter the dates applicable to the contract.
 - b. In **Status**, select the current status of the contract followed by an **As Of** status date.
 - c. In **Category**, select the appropriate category followed by an **As Of** category date.
 - d. In **Term. Reason**, select the reason for contract termination followed by the **Term. Date**.
 - e. In **ID**, type the ID of the contract.
 - f. In **Original Date**, enter the date the provider originally became a part of this contract followed by the **As Of** effective date.
 - g. In **Network**, select the network the provider is in and from which they are contracted into the product represented.
 - h. In **Deleg. Status**, select a status of how the contract is delegated, if applicable.
 - i. In **Designation**, select a designation, such as "Primary."
2. In the **Other** section complete any of the following substeps.
 - a. In the **Cred. Cycle** list, select a cycle, such as "By Department" or "Expires Even Years," if applicable.

- b. Click **Medical Director Notes**  and type any additional notes concerning the action.
 - c. Click **Information**  and type any additional notes concerning the contract record.
 - d. In the **Title** box, type the title of the provider at the contract, for example, "Director," if applicable.
 - e. Optional. This section of the **Contract Manager** form contains user-defined boxes that may be either hidden from view or visible and customized by your organization. If required by your organization, enter the appropriate information in these boxes.
3. To add addresses to the provider's contract record, in the **Assignment Addresses** section complete the following substeps.
 - a. In the **Assignment Addresses** section grid, click **Add** .
 - b. In **Select Provider Addresses**, select one or more addresses, then click **OK**.
4. To add specialties to the provider's contract record, in the **Assignment Specialties** section complete the following substeps.
 - a. In the **Assignment Specialties** section, in the grid, click **Add** .
 - b. In the **Select Provider Specialties/Boards** dialog box, select one or more specialty, then click **OK**.
 - c. Click **Close**.
5. To add additional IDs to the provider's contract record, in the **Additional IDs** section complete the following substeps.
 - a. In the **Additional IDs** section, in the grid, click **Add** .
 - b. In the grid, click under any column within the selected ID row, and type the appropriate information regarding the ID.
6. Optional. If your organization tracks additional information about the contract record, in the **User Defined** section, enter the required information.
7. Click **Save**.

Mass update contract records

You can mass update contract records from list view. Once you select your records and select the edit action, stepper will walk you through the fields you can update.

To mass update contract records, complete the following steps.

1. Open the **Contract Manager** (on page 264) form.
2. In **Select Contract**, select a contract, then click **OK**.
3. Select the records to include in the mass update using one of the available methods. (See [Mass updates and mass actions](#) (on page 103))
4. Click **Actions**, then **Edit**.

5. Update the field(s) as desired.
 - Changes made in the editing window will update all selected records.
 - Fields left blank will not be updated.
 - To remove all value from all selected records, click **Remove**  next to the value.
 - To undo the change to a value, click **Undo** .
6. Click **Next**.
7. Click **OK**.

Note

When the form is saved, changes made to the field(s) will automatically update the corresponding fields of all provider contract records selected for mass updating.

Exclusion Screening

Prerequisite

An additional license is required to use this module/add-on.

Exclusion Screening allows the user to screen providers in their symplr Provider database and determine those who are excluded from providing services and billing to Medicare and Medicaid patients. This feature sweeps a symplr database containing exclusion information gathered from the OIG, SAM, and state Medicaid exclusion websites. It then returns potential matches for you to confirm or dismiss.

The [View and manage Exclusion Screening history](#) (on page 273) contains a history of all screenings run for the selected provider and displays the resultant action taken on each potential match. This form allows you to run a report listing all of the results and sources used for a specific screening. Users can also capture images from screening sources and attach them to a screening record.

Submit providers to Exclusion Screening

The **Exclusion Screening** form allows you to submit providers, via query or individually, to the symplr Exclusion Screening database. Once submitted, the names of the selected providers are run through an algorithm to determine potential matches. These potential matches are then returned to the Exclusion Screening form for you to confirm or dismiss. To submit providers to Exclusion Screening, complete the following steps.

1. To gather providers for submission, complete the following steps, depending on the situation.

Situation	Steps
From the Exclusion Screening form	<ol style="list-style-type: none"> 1. In the Exclusion Screening form, from the Outbox tab, then click Add Row ⊕. 2. In Add Providers , find and select a provider. 3. Select one or more provider from the search results, then click OK. 4. Optional. To add additional providers, repeat the previous steps.
From the Results tab of a query, or from the following sympplr Provider forms: Providers, Credentialing/Verification, Credentialing Group, Credentialing Manager, and Group Practices	For specific steps, see the Use the Send To feature (on page 103) topic in this user help documentation.

After the provider, or providers, have been added to the **Outbox**, the additions to the **Exclusion Screening** form will be saved automatically.

2. Optional. To display additional details about a provider in the **Outbox** grid, select the desired provider, then click **View Details** ∨.
 - A details section appears beneath the grid displaying additional detail.
3. Optional. If you need to remove a provider from the **Outbox**, complete the following substeps.
 - a. Select the check box accompanying the provider name you want to remove.
 - b. With the provider selected, in the grid, click **Delete Row** ⊖.
 - c. Click **Save**.
4. From the **Outbox** tab grid, select one or more records to include using one of the available methods. (See [Mass updates and mass actions](#) (on page 103))
5. Click **Actions**, then **Submit**.
 - Submitted items are moved to the **Submitted** tab. If a provider is marked inactive after being sent to the **Outbox**, but has not been submitted to Exclusion Screening, the provider will not be submitted and appear on the [Resolve Exclusion Screening submission problems](#) (on the next page).

Work with Exclusion Screening results

You can view exclusion screening results in the **Exclusion Screening** form inbox.

To confirm or dismiss the results of an Exclusion Screening submission, complete the following steps.

1. Open the **Exclusion Screening** form and select the **Inbox** tab.

Tip

Sort the Match Count column to show the records with the most matches first.

2. Click on a row to view the potential matches in the second grid.

Tip

To reduce the number of items to view, you can hide records you have already reviewed.

- Click **Hide All Previously Dismissed** above the first grid to remove providers and all related matches from that grid.

Click **Hide Previously Dismissed** above the second grid to remove the specific matches previously dismissed from that grid.

3. In the second grid, select one or more records to include using one of the available methods. (See [Mass updates and mass actions](#) (on page 103))
4. Click **Actions**, then click the desired action.
 - a. **Dismiss Match** - selected entries are removed from the list.
 - b. **Confirm Match** - selected entries are confirmed and removed from the list.
 - i. Click **Save**.

View Match source

To view the source of a potential match on the web, click the globe  next the source listed in the lower grid. The source record opens in a new browser window with two additional tools:

Visit the FTC website

To visit the FTC website and view the Fair Credit Reporting Act, click the globe  in the upper right corner of the window.

Archive results

1. To archive all results for which there was no match found, above the first grid click **Archive All - No Match Found**.
2. Click **Save**.
 - All providers with no match found results in the upper section are removed from the form. These archived results can be viewed on the **Exclusion Screening Provider History** form.

Resolve Exclusion Screening submission problems

All exclusion screening results are accessible from the **Exclusion Screening** form, including records that could not be processed. These unprocessed records are placed into the **Errors** folder.

To resolve exclusion screening results problems, complete the following steps.

1. Open the **Exclusion Screening** form, then select the **Errors** tab. To view error detail, hover over the warning icon  for the record.
2. To correct a data error, complete the following substeps.
 - a. click **View this Provider** .
 - b. Correct any errors, then click **Save**.
 - c. Switch back to the Exclusion Screening work item to return to the list of errors, then repeat these substeps for each record to be corrected.
3. To resubmit the corrected records, complete the following substeps.
 - a. In the grid, select one or more records to include using one of the available methods. (See [Mass updates and mass actions](#) (on page 103))
 - b. Click **Actions**, then **Submit**.
 - Submitted records are resubmitted and are moved to the **Submitted** tab.
4. Optional. To remove records from the results grid, select one or more records using one of the available methods. (See [Mass updates and mass actions](#) (on page 103)), click **Delete Row** , then click **Save**.

View and manage Exclusion Screening history

The Exclusion Screening Provider History form contains a history of all screenings run for a selected provider. This form also allows you to run a report listing all of the results and sources used for a specific screening. To view and manage Exclusion Screening history, complete following steps.

1. To view the Exclusion Screening history for a specific provider, complete the following steps depending on the situation.

Situation	Steps
From the Exclusion Screening Provider History form	<ol style="list-style-type: none"> 1. Open the Exclusion Screening Provider History form. 2. In Find Provider, find and select a provider (See Find (Select) Modal (on page 114)).
From the Exclusion Screening form	<ol style="list-style-type: none"> 1. In the Exclusion Screening form, select the Inbox tab. 2. In the first grid, select the desired provider, then click Click to View Provider History .

2. To view and download a screening report, in list view, click **Screening Report** .
 - The report will load to your inbox for download.
3. To edit the record, switch to detail view. Alternatively, you can edit and manage columns directly in list view.

4. Optional. To display additional screening details in the detail view **Screening Results** grid, select the desired row, then click **View Details** 
 - The properties of the selected row appear beneath the grid, including the sources that were searched during the screening. If potential matches exist, the sources matched on will be displayed.
5. Optional. To view a screening source, in Sources Screened, click **Open Site**  next to the source to open.

License Monitor Viewer

Note

An additional license is required to use this module/add-on.

License Monitor Viewer is an optional application module that monitors expiration and changes to provider medical licensing information on the DEA and/or state level and incorporates any changes published by these agencies into the associated provider license records for your review.

You can view licensing alerts, search and filter messages for specific providers or licenses, and customize the result set view. You can also open licenses for editing or multi-select licenses to dismiss or archive.

Viewing Record Details

The License Monitor Viewer uses the standard symplr Provider grid structure that allows you to sort, filter, and view details for a selected record. You can also select which columns are visible. The license monitor viewer form grid allows you to:

- Multi-select rows to dismiss or archive records using **Select** and **Actions** (See [Mass updates and mass actions](#) (on page 103))
- View license detail in read-only mode using **Show Details** 
- Edit a license using **Open License** 
- View an attached images with View Attachment 

Advanced Filter Options

When License Monitor Viewer returns an update to a provider's licensing status, that record remains an entry in the License Monitor Viewer until it has been either dismissed or archived. To locate a record for a specific provider or a specific type of record, you can filter the record entries displayed by using the grid filters.

- The **Provider** and **License Number** filters can be used to locate records specific to a single provider.

- The **Expiration** and **Monitoring** date fields, **Outcome**, and **License Type** filters can be used to locate records related to certain licensing types that were retrieved during specific time periods with specified monitoring outcomes.
- Both active and inactive providers are included by default. Use the filter for **Provider Active** to narrow your selection:
 - **Is True** - returns active providers
 - **Is False** - returns inactive providers
 - **Clear** - returns to default showing all providers

Dismissing/Archiving Records

Each of the records displayed in the grid will continue to appear in the grid until it is archived. Dismissing a record means that the returned License Monitor Viewer update record has been reviewed and the record does not require any further attention. Archiving the record removes it from the grid and places it in an archive for future reference.

You can multi-select records to dismiss or archive by making your selections and choosing an option from **Actions**. Once you dismiss a record, the dismiss action for that record will be inactivated (grayed out).

Pharmacy Lookup

Pharmacy Lookup is an optional module that allows pharmacies to search your symplr Provider database via the Intranet, or Internet, to ensure the accuracy of provider signatures, DEA schedules, and licensure. All providers matching the search criteria entered are displayed along with brief demographic details. Pharmacy Lookup users may then select the desired provider to view additional detail, including signatures, DEA schedules and license images, for verification purposes.

For an individual to search the Pharmacy Lookup website, they must first be granted access to the product via the Pharmacy Lookup Configuration system form in symplr Provider. In order to grant access to Pharmacy Lookup, users must belong to a user group. As a result, the user will automatically inherit the security rights of the group to which they are added.

The types and amount of provider information displayed to Pharmacy Lookup users, as well as access to the product itself, is controlled and maintained by your symplr Provider system administrator. Users will authenticate through symplr Identity.

Manage access to Pharmacy Lookup

To manage Pharmacy Lookup user access, complete the following steps using the Pharmacy Lookup Configuration system form.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to manage Pharmacy Lookup user access.

Add a user

1. In the Users section, complete the following substeps.
 - a. To add a new user, in the grid click **Add User** .
 - b. To view the new user record detail, click **View Details** .
 - c. In the fields provided, enter any information about the new user.
 - i. An email address is required.
2. Click **Save**.

Remove user access (temporarily)

1. Deselect **Active** next to the user to deactivate.
2. Click **Save**.

Remove a user (permanently)

1. In the grid, select the row of the user that should no longer be able to access Pharmacy Lookup.
2. To remove the user from the grid, click **Remove User** .
3. Click **Save**.

Provider Directory

The Provider Directory is an optional module that enables you to publish provider information on the internet to help potential patients choosing a healthcare provider. Users can search for providers by any combination of available professional information such as practice specialties, office location, or even languages spoken by the provider. symplr Provider configuration settings provide security, and only the provider information you designate will be available to Provider Directory users.

Provider Directory offers real time data, as it is updated when symplr Provider is updated.

Configure Provider Directory

The configuration settings for Provider Directory are accessed via a dedicated weblink (Provider Directory Configuration), and the Provider Directory Configuration system form in symplr Provider. The configuration selections you make determine the fields that appear in Provider Directory.

The weblink is coming soon.

Configure Provider Directory Configuration system form

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to configure Provider Directory.

1. Open the **Provider Directory Configuration** system form.
2. In the **Setup** section, complete the following substeps.
 - a. To activate the Provider Directory website, select **Website Active**.
 - b. In **Inactive website message**, type the message to display to users when the website is not active, for example during website maintenance.
 - c. In **Results per page**, enter a numeric value to indicate the number of search results to display per search results page.
 - d. In **Default User Group**, select the user group whose security will determine access to the various records and fields displayed in the corresponding instance of Provider Directory.
3. In the **Record Filters Setup** section, complete the following substeps.
 - a. Click **Add** .
 - b. In **Add Record Filters Setup**, select one or more record filters, then click **OK**.

Note

In order to display records using the record filters added within this configuration section, the Default User Group specified must have access to the same record filter types.

Note

Record security refers to the security applied to specific records that may, or may not, be displayed through a web interface, such as Affiliation Letters. For example, a provider may have several license records of the same type, but your organization may wish to display only a specific license record in Affiliation Letters. Record filters, such as "Public Record," could be applied to those records that should be visible to the Affiliation Letters user.

4. In the **Details Page Setup** section, complete the following substeps.
 - a. Click **Add** .
 - b. In **Details Page Options**, select one or more options, then click **OK**.
5. In the **Results Page Setup** section, configure the results pages with the following substeps.
 - a. Click **Add** .
 - b. In **Results Page Options**, select one or more options, then click **OK**.

6. Optional. In the **Introduction Page Setup** section, enter any introductory information to display, such as instructions, contact information, and so on.
 - The text will be presented to the user when they enter the site (Single-entity and Corporate-level installation), or when they select an entity from which to perform a search (Enterprise-level).
 - The contents of the Introduction Page field can include standard HTML formatting.
7. In the **Search Page Setup** section, complete the following substeps.
 - a. In the **Pager Header** grid, click **Add** .
 - b. In the new grid row, type a description.
 - The **Page Header** section identifies if one or more search (step) pages will be available to the user.
 - If only one entry exists in this section, all criteria and formatting options in the **Individual Page Items** section will be presented on a single search page.
 - To view **Individual Page Items** for a specific page, select an item in the **Page Header** grid.
 - Optional. Click in the **Instructions** column of to add the search description instructions for the search page.
 - c. In the **Individual Page Items** grid, click **Add** 
 - i. In **Update Page Items**, select the items to add to the layout, then click  - Items in **Multi-use items** can be added multiple times to help you format your Directory Configuration.
 - To remove items from the layout, highlight the items to remove in the right grid, then click  - To reorder **Items in layout**, drag-and-drop an item to the desired location, or move the item to the top or bottom of the list using the arrows to the right of the list.
 - ii. Optional. Click in the **Instructions** column of the desired row to add or modify the search option instructions displayed on the search page.
 - d. In **Enter the Maximum number of results you wish displayed**, enter a numeric value.

8. The **Basic Filters** section, complete the following steps to hide specific record types. Repeat these steps for each grid that contains record types to hide.
 - a. In the selected grid, click **Add** (+).
 - b. In add modal, select one or more options, then click **OK**.

Note

For specific record types not selected in these grids to be visible to the Provider Directory user, security settings in symplr Provider must be set.

9. Optional. If your organization tracks additional information about the affiliation record enter the required information in the User Defined section.
10. Click **Save**.

Manage access to Provider Directory

In order for an individual to search the Provider Directory website, they must first be granted access to the product via the Users - Master Setup and Entities - Master Setup system forms.

To manage **Provider Directory** user access, complete the following steps.

Prerequisite

You must have the required [symplr Provider security](#) (on page 225) to manage Provider Lookup user access.

Users - Master Setup steps

1. Open the **Users - Master Setup** system.
2. In **Select User**, select the user to be granted access to Provider Lookup, then click **OK**.
 - If the user does not have an existing user account, see the [Manage users](#) (on page 224)
3. In the **Name** section, complete the following steps.
 - a. Verify that an email and system ID exist for the user.
 - b. If any changes or updates have been made to the user account, click **Save**.

Entities - Master Setup steps

1. Open the **Entities - Master Setup** system form.
2. Select an entity, then click **OK**. (for multi-entity users)

3. In the **File Setup** section, complete the following steps.
 - a. Select the **Web Applications** tab.
 - b. In the file grid, select **Provider Directory**.
 - c. In the User Group grid (located below the file grid), complete the following steps.
 - i. Click **Add** .
 - ii. In **Add User Groups**, select one or more groups, then click **OK**.

Note

The user group must be added to the entity before it can be granted access to a file. See [Manage access to Provider Directory](#) (on page 1) for more information. The user group will be added to the grid and automatically granted New, Change, and Delete access to the file at the entity by default.

- iii. Optional. Select any additional file access rights for the user group, for example, **Set Security, Sort Order, Audit Log, Attachments, or Notes**.
4. Optional. To grant access the **Provider Directory Configuration** system page, complete the following steps.
 - a. In the File Setup section, select the **System Forms** tab.
 - b. In the file grid, select **Provider Directory Configuration**.
 - c. In the User Group grid (located below the file grid), complete the following steps.
 - i. Click **Add** .
 - ii. In **Add User Groups**, select one or more groups, then click **OK**.

Note

The user group must be added to the entity before it can be granted access to a file. See [Manage access to Provider Directory](#) (on page 1) for more information. The user group will be added to the grid and automatically granted New, Change, and Delete access to the file at the entity by default.

5. Click **Save**.

Scheduler

The Scheduler is an optional module that allows users to schedule and run reports, and documents at a specified date and time, for example, on a nightly, weekly, or monthly basis, and all from within the symplr Provider user interface.

Schedule an item

To schedule a report, document, or packet to be run on a regular basis, complete the following steps.

1. Open the **Scheduler** form.
2. Select one of the following based on your situation.
 - If no scheduler records exist, click **Create a new record**.
 - If pre-existing scheduler records exist,, click **Add** .
3. In **Select File**, complete the following substeps.
 - a. Select the **Documents, Reports, or Packets** tab.
 - b. Select a file from the list, then click **OK**.
 - The selected files is highlighted and appears at the bottom of the grid.
 - c. With the file highlighted, click **View Details** .
4. In the resulting detail section, select **Modify the schedule**  to open **Edit Trigger Definition**, then complete any of the following substeps.
 - a. In **Summary**, select the **Time Zone, Start** date/time, and optional **End** date/time.
 - b. In **Recurrence**, complete any of the following substeps.
 - To schedule the item to run once, click **One Time**.
 - To schedule the item to run daily, click **Daily**, then enter the recurrence in number of days.
 - To schedule the item to run weekly, click **Weekly**, enter the recurrence in number of days, then select days of the week the schedule should run.
 - To schedule the item to run monthly, click the **Monthly** button, select the appropriate months and days the schedule should run.
 - c. Optional. To schedule the item to run multiple times at each recurrence, in **Repeat multiple times each recurrence**, enter the frequency (every) and duration (for) of the trigger.
 - d. Click **OK**.
5. Optional. To edit the scheduled file, in the **Schedule** section, click **Open the Scheduled Item**, then edit the item as desired.
6. Optional. With the new scheduled item still in focus, in the **Delivery Settings** section, select a distribution list and enable tracking history.

Note

The delivery settings selected for the item in the **Scheduler** form will override the default delivery settings of the report, document, or packet.

Click **Save**.

Manage the scheduler

You can inactivate and delete schedules, and change the schedule owner.

Prerequisite

You must have the required [security rights](#) to perform this procedure.

Inactivate a scheduled item

To inactivate a scheduled item, complete the following steps.

1. Open the **Scheduler** form.
2. In the **Schedule** section, complete the following substeps.
 - a. In the grid, select the item row to inactivate, then click **View Details** .
 - b. In the resulting detail section, select **Modify the schedule** .
3. In **Edit Trigger Definition**, deselect **Active**, then click **OK**.
4. Click **Save**.

Delete a scheduled item

To delete a scheduled item, complete the following steps.

Note

To maintain data integrity, sympplr recommends you inactivate a scheduled item instead of deleting it.

1. Open the **Scheduler** form.
2. In the **Schedule** section, in the grid, select the row containing the scheduled item you want to delete, then click **Remove** .
3. Click **Save**.

Change a schedule file owner

To edit the owner information of a scheduled item, complete the following steps.

1. Open the **Scheduler** form.
2. In the **Schedule** section, in the grid, select the row containing the scheduled item to change, then click **View Details** .
3. Click **Change Owner** .
4. In **Select User**, find and select a user, then click **OK**.
5. Click **Save**.