Provider Management Getting Started

Basic Configuration

Adding and Configuring Provider Roles

After you install the module you will need to add some provider roles to your installation. To do this go to the Manage Provider Roles page via the link in the Provider Management Module section of the Administration page. On this page you can create new provider roles and edit existing provider roles. For each role, you can configure the following parameters:

- **Supervisee Roles**: the roles that this role is able to supervise; for instance, one might have a "Head Surgeon" role and a "Surgeon" role that is set as a supervisee role of "Head Surgeon". This allows a provider with the role "Head Surgeon" to be assigned providers with the role "Surgeon" as supervisees.
- **Patient Relationship Types**: the various relationship types that can be used to link a provider with this role to patients; for instance, you might have a "Doctor" role that has a "Primary Care Provider" relationship type. (New relationship types can be created via the Manage Relationship Types link under the Person section of the Administration page.)
- **Associated Attribute Types**: associates one or more provider attributes with this particular provider role; these attributes will be displayed on (and editable from) the provider dashboard for all providers with this specific role. (New provider attribute types can be created via the Manage Provider Attribute Types link under the Providers section of the Administration page.)

One you've configured some provider roles (and added any necessary relationship types and provider attribute types) you can begin to use the system.

Using the Module

Searching for Providers

The Provider Management search page is a simple page for searching for existing providers and adding new providers. There is no direct link from the main patient dashboard to the this page. The module is intended to be used in conjunction with a module like the Role-Based Home Page module, which can be configured to provide role-based links to the search page. However, you can always reach the search page via the Provider Search link in the Provider Management Module of the Administration page.

The search page provides a simple name-based search as a well as more advanced search that allows one to search on various demographic information. Clicking on a provider in the search results loads the Provider Dashboard for that provider.

Adding New Providers

New providers can also be added from the search page. After typing a provider name in the search box, a button to add a new provider will be enabled. To avoid duplicates, the system will ask you to confirm that the provider you wish to add is different from any existing providers with similar names. It will also search all existing persons to see if perhaps this person already exists but needs a provider record associated with him/her.

Provider Dashboard

(Warning that this section assumes that the user has all OpenMRS privileges; certain sections can be hidden to the end user by restricting the privileges available to that user. More information can be found here).

The provider dashboard is split up into two main sections. The left section displays the basic demographic information for the selected provider as well as the provider role, and provides a means to edit this information. The right section contains a series of panes that list the various patients and/or supervisees for the specified provider. There is a separate pane for each relationship type supported by the provider (based on the provider role) and a supervises pane if the provider role is able to supervisee other providers (again, determined by the provider role). Finally, a supervises pane lists any supervisors for the selected provider. Note that because the panes displayed are depending on the role of the provider, until a role is assigned to a given provider, only the supervises pane will be available.

For each pane (except the supervisors pane, with is read-only) the following actions are available:

- **Add**: search for a patient (in the patient relationship pages) or provider (in the supervisees pane) to add as a patient/supervisee of the current provider; note that when searching for supervisees, only valid supervisees will be returned (for instance, if you are viewing the provider dashboard of a Head Surgeon, and a Head Surgeon can only supervise surgeons, only providers who are Surgeons will be returned in the search results).
- **Edit**: edit the start date of a patient/supervisee relationship
- **Transfer**: transfer the selected patients/supervisees to another provider/supervisor
- **Remove**: end the provider-patient or supervisor-supervisee relationship for the selected patient/supervisee
- **Void**: void the provider-patient or supervisor-supervisee relationship for the selected patient/supervisee

Also, if Supervisor Suggestions are configured, on the panel a Suggest action will also be available that will list a set of suggested supervisees for the current provider.

Once a provider-patient or supervisor-supervisee relationship is ended, that patient/supervisee will be moved out of the Current Patients or Current Supervisees list and into the Historical Patient or Historical Supervisees list. At this point, the only options available will be to edit the start and end date of those relationships, or to void the relationship. Setting the end date empty will move the specified patient/supervisee back into the Current list.

Patient Dashboard
It is planned that a future version of the module will add a “Providers” section to the patient dashboard which would display the providers for a patient, and allow for providers to be added and removed from this list. Currently, this functionality does not exist, but any provider-patient relationships for a patient will be listed in the Relationships section of the Overview tab.

However, when adding new relationships via the Relationships section, any provider-patient relationships will NOT be included in the list of relationship types. This is due to the fact that the relationships portlet is currently unable to provide the necessary validation to enforce that the person on the “provider” side of the relationship is actually a provider, and that the person on the “patient” side of the relationship is actually a patient. This can lead to data quality issues and cause the Provider Management module to operate unpredictably, so currently all provider/patient relationships must be set via the Provider Management module UI. Adding the Providers section to the dashboard should overcome this problem.

Other Notes

**Multiple providers per person**

OpenMRS core supports having multiple provider records associated with a single person. In attempt to simplify the UI, currently the Provider Management module does NOT support multiple providers per person (though the underlying Provider Management API does).