

Oracle® Health Patient Administration Configuration User Guide



G11558-02
April 2026



Oracle Health Patient Administration Configuration User Guide,

G11558-02

Copyright © 2024, 2026, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, MySQL, and NetSuite are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Preface

Diversity and Inclusion	i
Documentation Accessibility	i

1 Introduction

2 Prerequisites

3 Configure Cancel an Appointment

Configure Existing Scheduling Reason Settings	1
---	---

4 Configure Check In a Patient

Configure Patient Check In Settings	1
-------------------------------------	---

5 Configure Edit Patient Information

Configure Existing Edit Patient Settings	1
Configure New Edit Patient Settings	1

6 Configure Manage Financial Responsibility (Patient)

Configure Existing Financial Responsibility at the Patient Level Settings	1
---	---

7 Configure Manage Financial Responsibility (Visit)

Configure Existing Financial Responsibility at the Visit Level Settings	1
---	---

8	Configure Manage Patient Forms	
	Configure Existing Forms Settings	1
9	Configure Manage Resource Schedule Blocks	
	Configure Existing Scheduling Reason Settings	1
10	Configure Manage Visit	
	Configure Existing Manage Visit Settings	1
11	Configure Reschedule an Appointment	
	Configure Existing Scheduling Reason Settings	1
12	Configure Schedule an Appointment	
	Configure New Scheduling Settings	1

Preface

This preface contains the following sections:

Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

1

Introduction

This guide includes the prerequisites and steps required to configure Oracle Health Patient Administration.

Use this guide to configure the following functionality for Oracle Health Patient Administration:

-

2

Prerequisites

This topic provides information about configuring prerequisites for Oracle Health Patient Administration.

Ensure that the following prerequisites are completed before you begin configuring Oracle Health Patient Administration:

- Configure your organization security. See the Organization Security and VIP Indicator sections in [Understand Encounter and Person Registration Security](#).
- Configure the CMRN, MRN, and FIN alias pools. See [Understand Alias Pools](#)

3

Configure Cancel an Appointment

Settings can be configured for the cancel an appointment functionality in Oracle Health Patient Administration.

Note

Configuration for new settings is not required to configure the cancel appointment functionality.

Configure Existing Scheduling Reason Settings

Existing settings can be configured for the cancel an appointment functionality in Oracle Health Patient Administration.

A portion of existing settings for the scheduling reasons is recognized for Oracle Health Patient Administration. The Scheduling Reasons with a CDF Meaning of RES_REQUEST configuration steps in [Configure Scheduling Reasons](#) are required.

Note

Code grouping is not recognized.

4

Configure Check In a Patient

Settings can be configured for the patient check-in functionality in Oracle Health Patient Administration.

Configure Patient Check In Settings

To import patient identification or insurance card information using a scanner from a web application, Device Connect must be installed on the workstation from which scanning occurs.

To install and set up Device Connect:

1. When adding or editing patient information, select **Scan Document**. A Loading message is displayed. When device connect is not detected on the workstation, a new message is displayed, including a button to download Device Connect.
2. Select **Download Oracle Health Device Connect** to download the installer (msi for Windows, pkg for MacOS).
3. Run the downloaded installer to install Device Connect.
4. Close the drawer.
5. Select **Scan Document**.
6. Allow Device Connect to start, and agree with running Device Connect. A new tab is opened to finish setup.
7. When the Setup Successful message is displayed, close the tab.
8. On the page where you initiated scanning, if you see that a text and button to download Device Connect is still displayed, close and reopen the drawer.
9. Select your scanner, color mode, dpi, and any other settings, then select Scan.
10. Once the scan is complete, select **Use this Scan** to continue with the scanned images. To rescan, select **Scan Again**.

5

Configure Edit Patient Information

Settings can be configured for the edit patient functionality in Oracle Health Patient Administration.

Configure Existing Edit Patient Settings

All existing settings for the edit patient functionality are recognized for Oracle Health Patient Administration, except where noted below.

See [Understand Demographics in Registration](#).

Note

The following demographic elements are not supported in Oracle Health Patient Administration:

- Sexual Orientation
- Gender Identities
- Employment Status
- Tribal Affiliations

Configure New Edit Patient Settings

Settings can be configured for the edit patient functionality in Oracle Health Patient Administration.

Configuration for the age of majority is performed in Administrative Console. You must be logged in to the console as an administrator to configure this setting.

6

Configure Manage Financial Responsibility (Patient)

Settings can be configured for the manage financial responsibility at the patient level functionality in Oracle Health Patient Administration.

Note

Configuration for new settings is not required to configure financial responsibility at the patient level.

Configure Existing Financial Responsibility at the Patient Level Settings

Existing settings can be configured for the financial responsibility at the patient level functionality in Oracle Health Patient Administration.

All existing settings for financial responsibility functionality are recognized for Oracle Health Patient Administration, except where noted below. See the following pages for more information.

- [Bedrock Wizards for Core](#)
- [Configure Eligibility](#)
- [Configure Relationships from Code Set 351](#)
- All tabs except Insurance Profiles in [Understand Insurance Information for Revenue Cycle](#)

7

Configure Manage Financial Responsibility (Visit)

Settings can be configured for the financial responsibility at the visit level functionality in Oracle Health Patient Administration.

Note

Configuration for new settings is not required to configure financial responsibility at the visit level.

Configure Existing Financial Responsibility at the Visit Level Settings

Existing settings can be configured for financial responsibility at the visit level functionality in Oracle Health Patient Administration.

Note

All existing settings for financial responsibility functionality are recognized for Oracle Health Patient Administration, except where noted below. See the following pages for more information:

- [Bedrock Wizards for Core](#)
- [Configure Eligibility](#)
- [Configure Relationships from Code Set 351](#)
- All tabs except Insurance Profiles in [Understand Insurance Information for Revenue Cycle](#)

8

Configure Manage Patient Forms

Settings can be configured for the adding forms functionality in Oracle Health Patient Administration.

Note

Configuration for new settings is not required to configure the forms functionality.

Configure Existing Forms Settings

Settings can be configured for the forms functionality in Oracle Health Patient Administration.

All existing settings for the Forms functionality are recognized for Oracle Health Patient Administration. See [Configure eForms for Patient eSignature](#).

Users who manage patient forms must also have the Mark eSignature Form Complete privilege associated in Privilege Maintenance Tool (PrivMaint.exe or opened from DCPTools.exe).

9

Configure Manage Resource Schedule Blocks

Settings can be configured for the resource schedule blocks functionality in Oracle Health Patient Administration.

Note

Configuration for new settings is not required to configure the resource schedule block functionality.

Configure Existing Scheduling Reason Settings

Existing settings can be configured for the rescheduling an appointment functionality in Oracle Health Patient Administration.

A portion of existing settings for the scheduling reasons is recognized for Oracle Health Patient Administration. The Scheduling Reasons with a CDF meaning of PAT_REQUEST or RES_REQUEST configuration steps in [Configure Scheduling Reasons](#) are required.

Note

Code grouping is not recognized.

10

Configure Manage Visit

Settings can be configured for the manage a visit functionality in Oracle Health Patient Administration.

Note

Configuration for new settings is not required to configure the manage visit functionality.

Configure Existing Manage Visit Settings

A portion of existing settings for the Manage Visit functionality are recognized for Oracle Health Patient Administration.

Only the following code sets in [Understand Encounter Information for Revenue Cycle](#) are required:

- Accident Type
 - Code Set 1 (Accident Type)
 - Code Set 62 (Accident State)
- Discharge Disposition
 - Code Set 19 (Discharge Disposition)
- Encounter Type
 - Code Set 71 (Encounter Type)

All existing settings for the Manage Visit functionality are recognized for Oracle Health Patient Administration. See [Configure Place of Service Organizations](#).

Also, see [Understand Revenue Cycle Code Sets](#) for more information about code sets used in this workflow.

11

Configure Reschedule an Appointment

Settings can be configured for the reschedule an appointment functionality in Oracle Health Patient Administration.

Note

Configuration for new settings is not required to configure the reschedule appointment functionality.

Configure Existing Scheduling Reason Settings

Settings can be configured for the cancel an appointment functionality in Oracle Health Patient Administration.

A portion of existing settings for scheduling reasons is recognized for Oracle Health Patient Administration. The Scheduling Reasons with a CDF meaning of PAT_REQUEST or RES_REQUEST configuration steps in Configure Scheduling Reasons are required.

Note

Code grouping is not recognized.

12

Configure Schedule an Appointment

Settings can be configured for the scheduling an appointment functionality in Oracle Health Patient Administration.

Configure New Scheduling Settings

To configure these settings, ensure that you are logged into the Admin Console with the INFORMATION_TECHNOLOGY_ADMINISTRATOR role.

Configure Scheduling Templates

To configure scheduling templates:

1. In the Admin Console, select **Settings**.
2. Launch **Schedule Template**.
3. On the Schedule Template page, select **Create Schedule Template**.
4. Add the provider name, a template description (optional), and select a template type.

Note

All Weeks is the default template type, but you can also select the following types:

- **Rotating:** Can define different schedules for multiple weeks.
- **Week of Month:** Can define schedules for up to five weeks.

5. Select the **Add Slot (+)** button.
6. In the Create Slot drawer, select **Single** or **Multiple** and add all required information, then select **Save**.
7. Select slots and select the **copy from** and **paste to** buttons to copy slots from one day to another (or select the day of the week to copy all slots for that day).
8. When you have created your template, select **Save**.
9. Repeat Steps 3 through 8 to create additional templates.

Note

You can edit templates on the Schedule Template page by selecting the edit icon next to the template you want to edit.

Configure Resource Groups and Resource Schedules

To configure resource groups and resource schedules:

1. In the Admin Console, select **Settings**.

2. Launch **Resource Group**.
3. On the Resource Group page, select **Create Resource Group**.
4. Add the name of the group and a resource group description, and select **Add Resource**.
5. On the Add Resource page, search for resources by resource name.
6. Select the **add icon** in the Actions column to add a resource to the Selected Resources list.
7. Once you have selected all resources for the group, select **Add**.
8. On the Create New Resource Group page, select **Save**.
9. On the Resource Group page, select the **edit icon** for the group you created.
10. For each resource, select **Manage Schedules**.
11. On the Resource page, select **Add Schedule**.
12. In the Add Schedule drawer, select a template to use for this resource, start and end dates, and select **Save**.
13. When you have added a schedule for each resource, on the Manage Resource Group page, select **Save**.

Configure Appointment Types

To configure appointment types:

1. In the Admin Console, select **Settings**.
2. Launch **Appointment Type**.
3. On the Appointment Type page, select **Create Appointment Type**.
4. Select a specialty, a unique name within the specialty, a duration, and a description.
5. Select **Add Participant**.
6. Select a participant type of Patient, Practitioner, or Resource Group, then select the **add icon** to add to the Selected Participants list.
7. Repeat Step 6 as needed to add additional participant types.
8. Select **Add** to add the participants to the appointment type.
9. On the Create New Appointment Type page, adjust the Time Into and Time Needed values for the appointment type to provide offsets within the appointment type's duration window.
10. Select **Save**.
11. Repeat Steps 3 through 10 for each appointment type you want to create.