Outbound Patient and Chart Data

Common Use Case Package

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1 Introduction

This document provides information for an interface with these integrations:

- Outbound patient messages
- Outbound chart messages

Your organization may not have requested each integration; athenahealth specifies the sections you can skip if they're not applicable.

1.1 Interface Description

This interface supports the secure and automated transfer of information between athenaNet and an external third-party system. Interface data is formatted according to HL7 v2 standards to ensure compatibility across a wide array of platforms and software vendors. Interface data formats may include:

- External patient identifiers (e.g., a medical record number (MRN) assigned by a third-party vendor system)

- Patient demographics (e.g., name, date of birth, address, and so on)

- Patient insurance (e.g., carrier, member ID, and so on)

- Chart data (problems, allergies, meds, immunizations, medical and surgical history, and so on.)

1.2 Scope overview

This is a pre-scoped standard interface, which means athenahealth has selected many of the configurations for your convenience. If you require customization to this integration outside of what this document provides, contact your athenahealth Interface Project Engineer and they'll connect you with the athenahealth Integration Design team for more detailed scoping. Please note that customizing the integration may incur fees.

1.3 Scope process

1. **Review the project** – Read the entire Common Use Case Package
2. **Enter or select required information to configure the interface**–
   a. Double-click the gray fields and boxes that appear in the tables and within the text.
      The Form Field Options window opens.
   b. For fields, enter the information in the **Default Text** field. For checkboxes, select **Checked** or **Unchecked**. For menus, select the option in the **Items in Drop-Down list** box.
   c. Click **OK**.
3. **Approve the project** – Enter your name and date in the Scope Approval section to approve the scope of the interface on page 11.
4. **Return the completed CUC scope document as a Word doc** – this doesn't require a wet signature and shouldn't be returned as a PDF.

REMEMBER: Your athenahealth Interface Project Engineer is available to meet, assist with questions, and help you scope the project to determine the best options for your organization.

2 Project Information

Table 1 - General information

Details
athenahealth practice context ID
athenahealth practice name
Event number (provided by Interface Project Engineer for internal athenahealth tracking)
Vendor name
Vendor type (e.g., health information system, electronic health record, and so on.)

3 Common and Specific Use Cases

It's important to understand the related workflows and how this interface will exchange data between athenaNet and the third-party vendor system in support of those workflows.

Review the common use cases described in the table and think about how your organization will use the interface.

Table 2 – Interface Use Cases

Use case	Event	Functionality
Patient synchronization	New Patient ADDED in athenaNet	Patient ADDED in other system
	Patient UPDATED in athenaNet	Patient UPDATED in other system
New and amended encounter	Encounter SIGNOFF in athenaNet	Chart UPDATED in other system
Chart updates	Chart UPDATED in athenaNet	Chart UPDATED in other system

Think about how your organization will use the interface and outline specific use cases below. Use these questions to help guide you:

- What information in athenaNet do you want populated in the third-party vendor system?
- Does any of this information already exist in the third-party vendor system?
- Is there information your organization shouldn't send to the third-party vendor system?

Organizations specific use cases and workflow description

TIP: Review common and specific use cases with your athenahealth Interface Project Engineer until you're comfortable with the intended functionality. This ensures that you can prepare staff for changes to their workflow (e.g., parts of their workflow that are automated versus manual) that often occur with the introduction of a new interface.

4 Interface Enablement

Select the configurations your organization wants to enable for the interface. Check the box in the **Enable** column of each table to make a selection.

4.1 Patient

Select configurations for patient messages. Messages for patient data contain patient demographics.

Table 2 - Patient message enablement

Enable	Action	Direction	Message type
☐	Add patient	Outbound	A28
☐	Update patient	Outbound	A31

4.2 Encounter

Select configurations for encounter messages. These messages contain the episodic clinical document, which has the textual version of the encounter documented by the provider in athenaNet including vitals, social history, surgical history, and family history.

Table 3 - Encounter message enablement

Enable	Action	Direction	Message type
☐	Encounter sign-off	Outbound	T02

Do you want athenaNet to send the encounter summary as plain text or HTML? - blank -

4.3 Episodic Clinical Data

Select configurations for episodic clinical data messages. These messages contain patient demographics, vital signs, allergies, diagnoses, social history, past medical history, birth history, surgical history, and family history.

Table 4 - Episodic clinical data message enablement

Enable	Action	Direction	Message type
☐	Encounter sign-off	Outbound	A08

4.4 Lab and Imaging Orders Notification

Select configurations for lab and imaging orders notification data messages. These messages contain patient clinical orders for labs and imaging.

Table 5 - Lab and imaging orders notification message enablement

Enable	Action	Direction	Message type
☐	Lab order sign-off	Outbound	O01
☐	Imaging order sign-off	Outbound	O01

4.5 Lab and Imaging Results

Select configurations for lab and imaging results data messages. These messages contain lab and imaging results from inbound lab result interfaces and lab and imaging results recorded with discrete data elements associated to an athenaNet patient.

Table 6 - Lab and imaging results message enablement

Enable	Action	Direction	Message Type
☐	Lab result close	Outbound	R01
☐	Lab result update	Outbound	R01
☐	Imaging result close	Outbound	R01
☐	Imaging result update	Outbound	R01

If your organization enables lab and imaging results messages, provide a list of the current results interfaces your practice already has live in athenaNet:

Does your practice order Point of Care tests?   - blank -

4.6 Embedded .pdf

The interface can send outbound lab and imaging result documents your organization received via interface or manual upload to athenaNet as embedded .pdf files. The interface encodes the .pdf file in Base64 and sends in the OBX-5.5 field.

You can't configure this functionality to send outbound documents as embedded .pdf files from only one source (i.e., documents your organization received via interface or manual upload). The interface sends only documents that match the relevant result type (e.g., lab result).

Do you want to enable embedded .pdf for this interface?   - blank -

4.7 OID Value

An OID is a globally unique ISO Object Identifier assigned and registered by HL7. The value can be used to identify athenahealth as the information source.

Will this interface require an OID value to be sent?   - blank - If yes, please provide details:

5 Interface Configuration

5.1 Message Samples and Specifications

See the HL7v2 section of the Developer Toolkit (http://www.athenahealth.com/developer-portal/developer-toolkit/by-standard) to review message samples and specifications.

Can you provide sample data for inbound messages to the athenahealth Interface Project Engineer? - blank - Yes is recommended

5.2 Integration Testing

athenahealth provides a non-live, athenahealth-hosted test environment ("Preview") to facilitate integration testing before moving the interface to production. You should expect the third-party vendor to provide a similar non-live testing environment.

Will the third-party vendor provide a testing environment for this project? - blank - Yes is recommended

If you answered "No," explain how you will test the integration on the third-party vendor system:

5.2.1 Testing phases

Interface testing generally occurs in two phases: unit testing and end-user testing.

1. **Unit testing phase**
   athenahealth works directly with the third-party vendor to ensure that messages are being triggered, sent, received, and processed successfully in the respective system. During this phase your organization may be asked to confirm that the data in either system are accurate.
2. **End-user testing phase**
   The end-user testing phase begins after the unit testing phase. athenahealth provides general test plans and your organization plans, organizes, and executes interface testing as it relates to practice workflows. athenahealth may provide guidance when appropriate.

BEST PRACTICE: athenahealth recommends creating test plans specific to practice workflows, in addition to those athenahealth provides, for a more comprehensive end-user testing phase.

5.3 Connectivity Details

As part of interface implementation, athenahealth needs to establish a secure method of transfer for electronic data to and from a third-party system. The Connectivity Method Overview document contains our current connectivity offering and information regarding functionality and project steps.

http://www.athenahealth.com/~/media/athenaweb/files/developer-portal/Connectivity_Methods_Overview.docx

Contact your athenahealth Interface Project Engineer if you have questions.

5.4 External Identity Management

To assist with ID management throughout an integrated health system, athenaNet can store multiple external IDs, at both the patient and appointment level. External IDs may be used for matching purposes or external IDs may just be interfaced and stored in athenaNet using custom fields. All external IDs present in athenaNet, such as those supplied by an interface or import process, are available to be sent out over the interface.

If external IDs are included in scope for your integration, please complete tables 4 and 5 with your athenahealth resource. Enter the name and ID of each patient-level and appointment-level custom field. Select the HL7 field and whether athenaNet should use the ID for matching purposes.

> **REMEMBER:** You can match only one external ID per record number category even if you receive multiple IDs. athenaNet assumes the external ID is correct, therefore external IDs must be unique and non-changing

Table 7 – Patient-level custom fields

athenaNet custom field name	athenaNet custom field ID	HL7 field	Use for matching
		- blank -	- blank -
		- blank -	- blank -
		- blank -	- blank -
		- blank -	- blank -
		- blank -	- blank -

Are any of the above external IDs formatted with leading zeros? - blank -

By default, the information in the above tables is applied to all outbound messages when available.

Additional comments:

6 Outbound Message Information

6.1 Message Filtering

6.1.1 A Selective Filtering of Outbound Messages

You can filter outbound messages, so the interface sends messages only for particular providers, departments and provider groups.

Should the interface filter outbound messages?   - blank - If yes, please provide details:

Table 9 – Message Filtering

Filtering Type	Yes or No	Details
Behavioral Health	- blank -	
Privacy (patient consent)	- blank -	

6.2 Patients

This subsection provides information for outbound patient messages. **Please skip to section 6.3 if outbound patient messages are out of scope.**

6.2.1 Patient Race, Ethnicity, and Language

For outbound patient messages, the interface sends race and ethnicity in this format:

- CDC identifier (e.g., "1019-9" for the While Mountain Apache race)

The interface sends language in this format:

- ISO6392 code (e.g., "eng" for English)

6.3 Charts

This subsection provides information for outbound chart messages.

6.3.1 Code Sets

Review table 10 to understand the codes athenaNet sends in outbound chart messages.

Table 10- Code sets

Clinical data	Code set
Vitals	LOINC
Family History	SNOMED
Diagnoses	ICD-10, SNOMED **Note:** SNOMED codes are applicable for episodic clinical data messages only. In other messages athenaNet sends ICD-9
Lab	athenaNet global lab order types, LOINC **Note:** athenaNet sends LOINC only when available. Otherwise, athenaNet sends athenaNet global order types.
Imaging	athenaNet global imaging order types, LOINC **Note:** athenaNet sends LOINC only when available. Otherwise, athenaNet sends athenaNet global order types.

7 Scope Approval

Please provide an **electronic** signature approving the scope of the interface outlined in this document.

I, ⬜⬜⬜, agree to the interface design as described here in this document.

Date: ⬜⬜⬜

7.1 Additional Comments

Enter general interface comments and questions that the document or your athenahealth Interface Project Engineer didn't address.

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8 Appendices and other references

8.1 Interface Message Queue Manager

The Interface Message Queue Manager (IMQM) page in athenaNet is an interactive repository for all interface messages that pass through athenaNet. Use the IMQM to view messages or resolve common errors, such as missing providers, invalid procedure codes, or unknown departments. Review table 10 to understand how athenaNet defines each state. Messages in a final state (processed or deleted) remain in the queue for only 90 days.

Table 8 - Interface message processing state

Processing state	Definition
SCHEDULED	Scheduled to be sent later
NEW	Placeholder for a new message and ready to be sent or received
DISTRIBUTED	Delivery or acknowledgement is pending for global interfaces
PENDING	Delivery or acknowledgement is pending
PROCESSED	Processed normally; remains in queue for only 90 days
ERROR	Generic error encountered; routed to client
CBOERROR	Billing related error encountered; routed to client
ATHENAERROR	Internal error encountered; routed to athenahealth Client Support Center
DELETED	Messages that have been deleted; remains in queue for only 90 days

Table 11 lists each permission required to access and make changes to the IMQM. Your local system administer must grant the user permissions.

Table 9 - Interface Message Queue Manager permissions

Permission	Use case
Interface Admin: View Message Queue	You want to view the IMQM.
Interface Admin: Map Insurance Messages	You need to map insurance messages.
Interface Admin: Map Messages (except Insurances)	You need to map all messages excluding insurance messages (e.g. provider and department mappings).
Interface Admin: File Upload Interface	You want to upload files via the interface.

See the Interface Message Queue Manager guide for more information on the IMQM and your organization's responsibility for resolving messages in ERROR and CBOERROR status.

8.2 Continuing Service and Support

Your interface is transitioned into our daily service and support structure within two weeks after go-live.

As a standard practice, athenahealth continuously monitors all client connections and notifies the specified contacts if an error occurs. athenaNet monitors all jobs and restarts them automatically if they're idle. For details, see the Interface Down Support document.

You can also access support in athenaNet directly if you have questions about or modifications to the interface: On the Main Menu, click **Support** and then click **Get Help**.