



Inbound Patients

Common Use Case Package

athenahealth, Inc.

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1. Completing This Document
   1. Scoping Process

Your interface project manager is available to meet, assist with questions, and help determine the best-fit options for your project. Instructions for manual scoping are as follows:

1. **Review**:

Please read the Common Use Case Package and complete all form fields and check-boxes to the best of your ability. Should you have questions please do not hesitate to discuss with your interface project manager.

1. **Approve**:

When this document is completed to your satisfaction, please approve the scope of the interface by typing your name below.

* 1. Scope Approval

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

Date:

* 1. Project Information

Please fill the following to the best of your ability. While not all contacts are required, you should be able to submit at least two contacts at the onset of a new interface project.

|  |  |  |  |
| --- | --- | --- | --- |
| General Information | |  |  |
| Integration Project Name (if applicable) | | |  |
| Vendor  (If applicable, third party data exchange vendor) | Company Name:  (ex. athenahealth, Inc.) | |  |
| Software Product Name:  (ex. athenaNet) | |  |
| Version:  (ex. 14.9) | |  |
| Interface Engine:  (ex. athenaNet MX Engine) | |  |
| Trading Partner Name | | |  |
| Trading Partner Type (ex. Health Information System, EHR, etc.) | | |  |
| athenahealth Practice Context ID | | |  |
| athenahealth Interface Project Manager Name | | |  |
| athenahealth Interface Project Manager Contact Information | | |  |
| Event Number (provided by Interface Project Manager, for internal athenahealth tracking) | | |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Contact | Role | Details | |
| Project Business Contact | Responsible for overall success of the project | Name: |  |
| Phone: |  |
| Email: |  |
| Project Interface Contact | Interface expert, responsible for continuing interface support | Name: |  |
| Phone: |  |
| Email: |  |
| Project IT Contact | Networking and security expert, responsible for overall connectivity | Name: |  |
| Phone: |  |
| Email: |  |
| Vendor Contact #1 | Role: | Name: |  |
| Phone: |  |
| Email: |  |
| Vendor Contact #2 | Role: | Name: |  |
| Phone: |  |
| Email: |  |

1. General Interface Configuration
   1. Message Types

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

By choosing to move forward with this standard integration you are committing to the scope outlined below. If you require any customization to this integration, please contact your athenahealth project manager to engage athenahealth’s Integration Design team for detailed scoping. Please note that any customizations will result in this integration becoming a custom interface, and will incur additional fees.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Event | Default Message | Functionality |
|  | Add Patient | New Patient ADDED in other system | A28 | Inbound |
|  | Add Patient | New Patient ADDED in other system | A04 | Inbound |
|  | Update Patient | Patient UPDATED in other system | A31 | Inbound |
|  | Update Patient | Patient UPDATED in other system | A08 | Inbound |

* 1. External ID Management

To assist with patient ID management throughout an integrated health system, athenaNet can store multiple external IDs. External IDs may be used for matching purposes or external IDs may just be interfaced and stored in athenaNet using custom fields. Only one external ID may be used for matching per record number category.

For example, suppose the other system assigns an EMPI ID, a chart number, a hospital MRN, and a FIN number. Although you may only intend to use one of them for matching purposes, all of the other IDs can be stored as well. Information stored in athenaNet Custom Fields can be made searchable and appear on various patient workflow screens, including the patient Quickview screen.

Please identify Person level Custom Fields here:

|  |  |  |  |
| --- | --- | --- | --- |
| athena Custom Field Name | athena Custom Field ID | HL7 Field | Use for Matching |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

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

* 1. Message Samples and Specs

For athenahealth samples and specifications, please see the [Developer Toolkit](http://www.athenahealth.com/developer-portal/developer-toolkit/by-standard).

(http://www.athenahealth.com/developer-portal/developer-toolkit/by-standard)

|  |  |
| --- | --- |
| **Patient (ADT) Sample Message** | |
| A28  Add Patient | MSH|^~\&|ATHENANET|432^AA - Aaron Athena Aardvark, MD|OPAC - 432 - Final Build||201709251601||ADT^A28|1307569M432|P|2.3.1  EVN|A28|201709250400|||username  PID||299202^^^Enterprise ID|299202^^^Enterprise ID|299202^^^Enterprise ID|TEST^SPEC||19900101|F|ATHENA|2058-6^African American|40 TEST AVENUE^^BRIGHTON^MA^02135^UNITED STATES||(555)444-6666^PRN^PH^^1^555^4446666~~TEST@EMAIL.COM^NET^^TEST@EMAIL.COM~(555)123-5555^ORN^CP^^1^555^1235555||eng^English|M|||555661234|||2180-8^Puerto Rican  NK1|1|TEST^EMERGENCY|SPOUSE||(555)666-4444||C  PV1|||52^TEST DEPARTMENT^^TEST DEPARTMENT||||132P432^AARDVARK^AARON||||||||||132P432^AARDVARK^AARON  GT1|1||TEST^SPEC||40 TEST AVENUE^^BRIGHTON^MA^02135^UNITED STATES|(555)444-6666^TEST@EMAIL.COM||19900101|||Self||||||||||||||||||||||||||||||||||EMERGENCY TEST|(555)666-4444||SPOUSE  IN1|1|40^Self-Pay (cash)|40^Self-Pay (cash)|Self-Pay (cash)|||||||||||PP|||||||1 |
| A31  Update Patient | MSH|^~\&|ATHENANET|432^AA - Aaron Athena Aardvark, MD|OPAC - 432 - Final Build||201709251621||ADT^A31|1307640M432|P|2.3.1  EVN|A31|201709250421|||username  PID||299202^^^Enterprise ID|299202^^^Enterprise ID|299202^^^Enterprise ID|TEST^SPEC||19900101|F|ATHENA|2058-6^African American|TEST AVENUE^UNIT 1^RICHMOND^VA^23222^UNITED STATES||(555)444-6666^PRN^PH^^1^555^4446666~~TEST@EMAIL.COM^NET^^TEST@EMAIL.COM~(555)123-5555^ORN^CP^^1^555^1235555||eng^English|M|||555661234|||2180-8^Puerto Rican  NK1|1|TEST^EMERGENCY|SPOUSE||(555)666-4444||C  PV1|||52^TEST DEPARTMENT^^TEST DEPARTMENT||||132P432^AARDVARK^AARON||||||||||132P432^AARDVARK^AARON  GT1|1||TEST^SPEC||TEST AVENUE^UNIT 1^RICHMOND^VA^23222^UNITED STATES|(555)444-6666^TEST@EMAIL.COM||19900101|||Self||||||||||||||||||||||||||||||||||EMERGENCY TEST|(555)666-4444||SPOUSE  IN1|1|40^Self-Pay (cash)|40^Self-Pay (cash)|Self-Pay (cash)|||||||||||PP|||||||1 |

* 1. Integration Testing Environment

A non-live, athena-hosted preview environment is provided to facilitate integration testing prior to moving the interface to production. It is expected that the other vendor system provides a similar non-live environment for testing on their side as well.

Will a vendor test environment be made available for this project?  Yes is recommended

If no, please tell us what will be done for testing:

* + 1. Testing Phases and Resource Allocation

Interface testing is generally broken up into two phases, unit testing and end-user testing.

In the unit testing phase, athenahealth works directly with the other vendor to ensure outbound messages are generated and delivered successfully to the receiver. For inbound message testing, athenahealth will confirm messages are received and processed.

Upon completion of unit testing, end-user testing phase begins. athenahealth may provide guidance when appropriate, but ultimately it is client responsibility to plan, organize, and carry out testing of their interface in relation to practice workflows.

1. Inbound Message Configuration
   1. Patients

The following section contains configurations related only to inbound patient messages.

* + 1. Minimum Required Fields for Patient Messages

To create a patient, the following data fields need to be specified. We expect data to be in the following HL7 fields.

|  |  |  |
| --- | --- | --- |
| Data Field | Default HL7 Field |  |
| Last Name | PID.5.0 |  |
| First Name | PID.5.1 |  |
| Date of Birth | PID.7 |  |
| Provider | PV1.7 |  |

To create a patient’s insurance, the following data fields need to be specified. We expect data to be in the following HL7 fields.

|  |  |  |
| --- | --- | --- |
| Data Field | Default HL7 Field |  |
| Package ID | IN1.2 |  |
| Name | IN1.4 |  |
| Policy Number | IN1.36 |  |
| Relationship to Insured | IN1.17 |  |

* + 1. Matching Logic for Patients

For this interface, the athenaNet patient matching algorithm compares demographic information in athenaNet with the data elements in each message received. The data elements used for patient matching are athena patient ID, client-specified external patient ID, full last name, full first name, date of birth, SSN, gender, middle initial, address and phone number. The athenaNet Interface Message Queue Manager provides a manual review process for messages that may create duplicate patient records or substantially change the demographics for an existing patient record.

EXTERNAL ID MATCHING: athenaNet assumes the external ID provided by the other system is correct, therefore external IDs must be unique and non-changing.

* + 1. Processing Logic for Patient Messages

4.1.3.1 Insurance Processing

Inbound insurances from an external system must be mapped to a valid insurance package in athenaNet. Mapping is the responsibility of the end-user and may represent a significant effort. It is recommended to begin before go-live. Each foreign insurance ID will need to be mapped once. If a new foreign insurance ID is encountered, the entire message will be routed into an ERROR queue for end-user mapping prior to processing. It’s important to note this could delay the processing of inbound demographic and insurance data.

Properly mapped insurances will be processed as follows:

1. If no insurance policy on the patient’s Quickview with the given sequence number (primary, secondary, tertiary) exists, athenaNet will add the new insurance policy.
2. If an insurance policy on the patient’s Quickview with the given sequence number already exists, and the insurance package ID of the old policy matches the insurance package ID of the new policy, then the existing policy will be updated with the new data.
3. If an insurance policy with the given sequence number already exists, and the insurance package ID of the old policy does not match the insurance package ID of the new policy, then the existing policy will be cancelled, and the new policy will be added.
4. If an insurance is not provided in the message, the patient will be assigned to a self-pay policy in athenaNet which will overwrite and existing insurance information on the patient record.

A patient created without insurance will be unavailable for appointment scheduling or charge-entry until an insurance policy is added. By default, inbound updates to insurance packages will overwrite existing data. This means that if a message is received with no patient insurance information, that patient will be converted to self-pay (assuming they had been listed as previously having an active policy).

Case Policies are considered to be non-sequenced insurances on the Quickview screen of athenaNet. That is, they are neither Primary (1) or Secondary (2). Case policies have a sequence of zero. If an external insurance with sequence 1 (primary) is mapped to a case policy in athenaNet, its sequence is automatically converted to zero on the patient Quickview. This allows the case policy to display under the special case policies section at the bottom of the Quickview page. Also, it is important to note that case policies sent outbound do not have a sequence number. The most common types of case policies include MVA and Workers Comp insurance.

4.1.3.2 Patient Privacy Fields

athenahealth requires that our providers indicate when a patient has authorized release of information and assignment of benefits as required by the HIPAA electronic claims standard. If these fields are not specified for a new patient (i.e. interface messages that result in a new patient being added to athenaNet), any claims created for that patient may be held by a global privacy notification claim rule.

By default, these fields are populated by the interface. They can still be addressed through regular athenaNet workflow, i.e., manually marking/unmarking these check boxes on the athenaNet patient Quickview screen. Please ensure the client is obtaining all necessary consents and authorizations as part of their usual workflow.

4.1.3.3 Guarantor Handling

athenaNet is able to exchange name, address, relationship to patient, but does not support the exchange of unique IDs. This is because guarantors are stored as additional data elements on a person record in athenaNet and are not given a separate person ID.

* 1. Interface Mapping Requirements

It may be not be possible for some vendors to send athenaNet’s values for race, ethnicity, language, country, marital status, relationship to patient, department, provider, appointment type, and appointment cancellation reason. In these cases, the practice will need to manually create and permanently maintain interface mappings that link their foreign codes to the ones that exist in athenaNet.

1. Connectivity Method Overview

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

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

For questions, please contact your Interface Project Engineer.

1. Appendices and Other References
   1. Planned Maintenance Window

The athenaNet MX Engine is subject to the same maintenance windows as the default, all interfaces are shut-off during this time window, and also remain disabled until 4 A.M. Eastern Time.

* 1. Interface Message Queue Manager

The athenaNet Interface Message Queue Manager (IMQM) is an interactive repository for all interface messages that pass through athenaNet. Messages can be categorized into several processing states. Please note that messages in a final state (processed or deleted) will only remain in the queue for 90 days.

|  |  |
| --- | --- |
| Message State | Explanation |
| SCHEDULED | Scheduled to be sent at a later time |
| 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 |

In order to access the IMQM in athenaNet to manually resolve common errors, such as missing providers, invalid procedure codes, or unknown departments, the following user permissions must be granted by the local system administrator:

|  |  |
| --- | --- |
| Permission | Use Case |
| Interface Admin: View Message Queue | You want to be able 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 be able to upload files via the interface. |

See [athenaNet Interface Queue Management Guide](http://www.athenahealth.com/developer-portal/developer-toolkit/support) for more information on the functionality of the IMQM and on client-side cleanup for ERRORs and CBOERRORs.

* 1. Continuing Service and Support

Within two weeks after go-live your interface will be transitioned into our daily service and support structure.

As a standard practice, athenahealth continuously monitors all client connections and will notify the contacts specified if an error occurs. All jobs are monitored and automatically restarted if idle. For more details please refer to the [Interface Down Support Document](http://www.athenahealth.com/developer-portal/developer-toolkit/support).

To contact athenahealth for questions or modifications to the interface, support can be accessed directly in athenaNet:

