



Outbound Data File Delivery

Interface Scoping Questionnaire

athenahealth, Inc.

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Formerly Outbound Automated Reports or Automated Report Delivery or Automated Report Delivery – 835+837

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1. Completing This Document

The integration process can be complicated at times and it’s important to recognize that a number of configuration options will be presented to you along the way. They are documented here in the Interface Scope Questionnaire (ISQ) as interface settings. To help you navigate the scoping process, we provide a recommendation for each of the available settings.

* 1. Icons Glossary

Throughout the ISQ you'll find various icons to highlight athenahealth recommended settings and best practices.

 The olive branch icon indicates athenahealth recommended settings.

 The money icon indicates options that may incur additional costs.

**BEST PRACTICES:** The horizontal bar is generally used to highlight additional tips, considerations, and advice.

* 1. Scope 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 entire Interface Scoping Questionnaire (ISQ) and complete all form fields and check-boxes to the best of your ability. Should you have questions about the configuration options presented in this document 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. Product Description

This class of interface includes Outbound Data File Delivery. The Outbound Data File Delivery is the interfacing or delivering of an existing custom report already built into athenaNet or ERA/EDI files. Please consult your Project Manager or Account Manager for more information about the development of the report. This interface can be used in conjunction with a General Ledger or appointment reminder system, or any other system that requires regular delivery of data. Reports can be delivered as frequently as once per calendar day.

Should you need more than one report delivered, please fill out an additional ISQ for each custom report.

1. General Interface Configuration
   1. Integration Testing Environment

This class of interface does not require testing because it contains no customization and has already been tested by athenahealth.

* 1. Interface Workflow

Please select the report type in the table below that applies to your request (choose a single report type):

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Report Type | Direction | Report Information | |
|  | ERA Files (835 - Remittance) | Outbound | N/A | |
|  | EDI Files (837 - Claims) | Outbound | N/A | |
|  | ERA and EDI Files | Outbound | N/A | |
|  | Report Builder Report  (including General Ledger Reports) | Outbound | Context ID:  Report Library Tab:  Report ID:  Report Name: | Backfill Report:  Report Library Tab:  Report ID:  Report Name: |
|  | Custom Report | Outbound | Context ID:  Report Library Tab:  Report ID:  Report Name: | |

* 1. Backfills

An additional offering is for athenaNet to send a load of historical reports to the other systems just as the interface is first enabled.

Please note that backfill availability is dependent on report type, and may not be available for all reports.

Does this project require a backfill?  Complicated backfills may incur additional cost

If a backfill is being provided it is strongly advised that a separate directory is provided on the FTP server.

Additional comments:

* 1. Additional Comments

Through completion of this document, if there are general interface comments, not already covered by the questions and sections below, please enter them here:

1. Outbound Message Configuration
   1. Reports
      1. Delivery Cycle

Please complete the following table for all Outbound Automated Report interfaces:

|  |  |
| --- | --- |
| Preference for Delivery Cycle (check one): | |
|  | Daily Batches will be sent between 4am and 6am |
|  | Daily Batches will be sent at other specified time: |
|  | Weekly Batches will be sent at specified day of week and time: |
|  | Monthly Batches will be sent at specified day of month and time: |

* + 1. Configurations for ERA and EDI Reports Only
       1. File Delivery

There will be multiple files per day representing the various payers, processed from the day before. Each payer will be in its own zip file unless the bundle option is selected below. If there are no files to be sent for a given day, no data are sent.

|  |  |
| --- | --- |
| Configuration Item | Options |
| Bundle daily payer zip files into one daily zip? | Yes |
| No |

* + - 1. File Naming for ERA Files

Each zip file will contain the individual ERA files, each representing one EOB file, although the original ERA file may have represented more than one EOB. To assist in this matter, the header data in the file will be from the original sender.

|  |  |  |
| --- | --- | --- |
| Naming | Example | Type |
| contextid\_file generation date (CCYYMMDD)\_835\_payor name.zip | 432\_20110623\_835\_Medicare-FL.zip | Default |
| contextid\_file generation date (CCYYMMDD)\_835.zip | 432\_20110623\_835.zip | Bundle option Yes |
| contextid\_backfill start date\_backfill end date\_835.zip | 432\_20050101\_20160524\_835.zip | Backfill |

* + - 1. File Naming for EDI Files

|  |  |  |
| --- | --- | --- |
| Naming | Example | Type |
| contextid\_file generation date (CCYYMMDD)\_837\_internal billing batch ID number.zip | 432\_20110623\_837\_1234.zip | Default |
| contextid\_file generation date (CCYYMMDD)\_837.zip | 432\_20110623\_837.zip | Bundle option Yes |
| contextid\_backfill start date\_backfill end date\_837.zip | 432\_20050101\_20160524\_837.zip | Backfill |

Each zip file will contain multiple individual claims.

* + 1. Configurations for Report Builder and Custom Reports Only

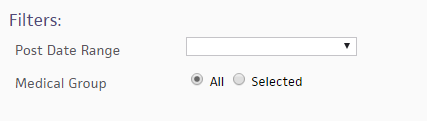
Please complete the following table of configuration items for Outbound Report Builder and Custom Reports:

|  |  |
| --- | --- |
| Configuration Item | Options |
| Instance | Production |
| Preview |
| Delivered Report Name | ReportNameYYYYMMDD |
| Custom:  If Backfill requires separate name, please specify: |
| Delivered Report Format | CSV |
| Tab Delimited |
| Custom: Pipe Delimited |
| Custom: |
| Include Column Headers? | Yes |
| No |
| Send Zipped Files? | Yes |
| No |

* + - 1. Input Fields and Filters (Binds)

Depending on the design of the Custom Report there may be additional filters that need to be valued to run the report.

Please navigate to your Report Library and click **Schedule** next to your report, which will display a screen that will include a section similar to the following if these additional filters exist:



In the first column below, list all of the available filters from that page (example: Post Date Range). In the second column, provide the bind values that should be used for scheduling the recurring running of this report (example: Yesterday) In the third column, provide the values that should be used for scheduling the backfill running of this report, if applicable, (example: Show All).

|  |  |  |
| --- | --- | --- |
| Report Filter (Binds) | Bind Values for Recurring Report | Bind Values for Backfill Report |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

1. Inbound Message Configuration

There are no inbound messages for this interface type. Please proceed to the next section.

1. Connectivity Method Options

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 most common options are described in this section. Not all options will be available for all interface types. For questions, please contact your Interface Project Manager.

Connectivity method choice and details will be collected in the Connectivity Worksheet:   
<http://www.athenahealth.com/_doc/interfaces/Standardized_Connectivity_Worksheet.pdf>  
<http://www.athenahealth.com/_doc/interfaces/Interface_Connectivity_Worksheet.pdf>

* 1. Locally-Hosted SFTP

athenahealth can initiate outbound connections to a third-party or client-hosted SSH2 server. The client provides an IP (or DNS name), username, and password for athenahealth to initiate an outbound SSH connection. Once the SSH tunnel is established we can exchange files locally using SFTP.

1. Project Plan

New athenaNet interfaces are worked as separate projects alongside the athenaNet implementation. These projects are designed and adapted to fit within the same timeline as the primary implementation window.

* 1. Sample Interface Project Plan

|  |  |  |
| --- | --- | --- |
| Phase | Duration | Description |
| SCOPE | 4 weeks | Client and athena review and scope project. Interface Scoping Questionnaire (ISQ), detailing the options and extras required for the interface, and the Interface Proposal (IP), detailing the cost of the interface, are completed and signed in this stage. Client completes a connectivity worksheet. |
| BUILD | 4 weeks | Client and athena work together to establish a secure communications connection between athena and the practice. Athena creates necessary code for the interface, and tests it internally given whatever samples the client has supplied. At the end of this period, interface is released on PREVIEW test server. |
| TEST | 4 weeks | Client tests interface for correctness and workflow impact. Any interface modifications are done in this stage. At the end of this period, when satisfied, client signs the Go Live Agreement (GLA). athena will participate in unit testing to verify functionality from a technical perspective. Full end-user acceptance testing is the client’s responsibility to plan, organize, and support. |
| GO LIVE | 2 weeks | Athena brings the interface live on the agreed date. Athena must have at least 2 days advanced notice on the go-live date. Post Go-Live, the interface maintenance is transitioned to a dedicated team |

 Shortening project duration may incur additional cost



1. Appendices and Other References
   1. Planned Maintenance Window

The athenaNet MX Engine is subject to the same maintenance windows as the general athenaNet application. Currently, 1 A.M. to 3 A.M. Eastern Time is reserved every morning for maintenance. By 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:

