



Outbound Patients and Chart Data

Interface Scoping Questionnaire

athenahealth, Inc.

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Formerly Outbound Clinical HL7v2

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

* External Patient Identifiers (MRN or CPI assigned by an outside system)
* Patient demographics (name, dob, address, etc.)
* Patient insurance (carrier, member ID, etc.)
* Chart Data (problems, allergies, meds, immunizations, medical/surgical history, etc.)

Common use-case scenarios are depicted below. It is important to identify and review your specific use-cases with the Interface Project Manager.

|  |  |  |  |
| --- | --- | --- | --- |
| Use Case | Event |  | Functionality |
| Patient synchronization | New Patient ADDED in athenaNet  Patient UPDATED in athenaNet  Patients MERGED in athenaNet |  | Patient ADDED in other system  Patient UPDATED in other system  Patients MERGED in other system |
| New & amended encounter | Encounter SIGNOFF in athenaNet |  | Chart UPDATED in other system |
| Chart updates | Chart UPDATED in athenaNet |  | Chart UPDATED in other system |

**WORKFLOW SCENARIOS**: Be sure to discuss workflow and interface use-cases with your interface project manager until you’re absolutely comfortable with the intended functionality. Often times the introduction of an interface will alter your end user workflow, in a good way, and it’s important to understand which elements are automated versus requiring manual input so that information can be conveyed to practice staff.

1. General Interface Configuration
   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:

Please confirm that only non-live, athena-hosted preview environment will be used for testing.  Yes is recommended

* + 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.

**TEST PLANS**: Plans should be aligned with the supported use cases. In addition to test plans offered by the Interface Project Manager we encourage you to come up with your own test scenarios as appropriate.

* 1. Message Formats & Systems

athenaNet uses HL7 v2 standards.

Is the purpose of this interface to replace an existing interface?

If yes, please describe existing interface:

Additional Comments:

* 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)

* 1. Interface Workflow

Consider your workflows and use cases for this interface and outline them below. The following are some questions to get you thinking about your workflows: In what system do you plan to create new patients? In what system do you plan to update existing patients? In what system do plan to add or update patient insurance policies? In what system do you plan to enter appointments? In what system do you plan to enter charges? Which system is the source of truth and which is being updated for each type of data?

With your workflows above in mind, please complete the interface message types and triggers table below:

* + 1. Patients

Messages for this data type include patient demographics.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Add Patient | Outbound | A28 |  |
|  | Update Patient | Outbound | A31 |  |
|  | Merge Patient | Outbound | A40 |  |

* + 1. Encounters

Messages for this data type include the episodic clinical document, which contains the textual version of the encounter, as documented by the provider in athenaNet, including vitals, social history, surgical history and family history.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Encounter Sign-off | Outbound | T02 |  |
|  | Vital Add | Outbound | A08 |  |

* + 1. Episodic Clinical Data

Messages for this data type include patients demographic, vital signs, allergies, diagnoses, social history, past medical history, birth history, surgical history and family history.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Encounter Sign-off | Outbound | A08 |  |
|  | Encounter Re-Open | Outbound | A11 |  |
|  | Vital Add | Outbound | A08 |  |

* + 1. Problems

Messages for this data type include patient clinical problems diagnosed or recorded in athenaNet.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Encounter Sign-off | Outbound | PC1 |  |
|  | Add Problem | Outbound | PC2 |  |
|  | Update Problem | Outbound | PC2 |  |
|  | Delete Problem | Outbound | PC2 |  |

* + 1. Allergies

Messages for this data type include patient allergies recorded in athenaNet.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Encounter Sign-off | Outbound | A08 |  |
|  | Add Allergy | Outbound | A08 |  |
|  | Update Allergy | Outbound | A08 |  |
|  | Delete Allergy | Outbound | A08 |  |

* + 1. Medications

Messages for this data type include patient medications prescribed or recorded in athenaNet, as well as historical medications downloaded from external sources when applicable.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Encounter Sign-off | Outbound | O01 |  |
|  | Prescription Add | Outbound | O01 |  |
|  | Prescription Update | Outbound | O01 |  |
|  | Prescription Re-Open | Outbound | O01 |  |
|  | Prescription Delete | Outbound | O01 |  |
|  | Historical Medication Add | Outbound | O01 |  |
|  | Historical Medication Update | Outbound | O01 |  |
|  | Historical Medication Delete | Outbound | O01 |  |

* + 1. Vaccines

Messages for this data type include patient vaccinations ordered or recorded in athenaNet. \*Unit of Measures evolve over time based on Clinical Content updates.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Encounter Sign-off | Outbound | V04 |  |
|  | Ordered Vaccine Add | Outbound | V04 |  |
|  | Ordered Vaccine Update | Outbound | V04 |  |
|  | Ordered Vaccine Delete | Outbound | V04 |  |
|  | Historical Vaccine Add | Outbound | V04 |  |
|  | Historical Vaccine Update | Outbound | V04 |  |
|  | Historical Vaccine Delete | Outbound | V04 |  |

* + 1. Order Notifications

Messages for this data type includes patient clinical orders for all athenaNet order types, including labs, imaging, referrals, vaccinations and others.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Order Sign-off | Outbound | O01 |  |

* + 1. Lab & Imaging Results

Messages for this data type include lab & imaging results from inbound lab result interfaces and lab & imaging results recorded with discrete data elements associated to an athenaNet patient.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Lab Result Close | Outbound | R01 |  |
|  | Lab Result Update | Outbound | R01 |  |
|  | Imaging Result Close | Outbound | R01 |  |
|  | Imaging Result Update | Outbound | R01 |  |
|  | Imaging Result Re-Open | Outbound | R01 |  |
|  | Imaging Result Delete | Outbound | R01 |  |

* + 1. Patient Cases

Messages for this data type include details for patient cases documented in athenaNet, including billing questions, patient prescription questions and administrative patient medical record updates.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Enable? | Action | Direction | Default Message | Custom Message |
|  | Patient Case Added | Outbound | T02 |  |
|  | Patient Case Updated | Outbound | T02 |  |

* 1. External ID Management

In order 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. All patient IDs present in athenaNet, including external IDs such as those supplied by an interface or import process, are available to be sent out over the interface.

For example, suppose the other system assigns an EMPI ID, a chart number, and a hospital MRN. 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. In most cases an external ID may not be used as the athenaNet patient ID.

Please identify Person level Custom Fields here:

|  |  |  |  |
| --- | --- | --- | --- |
| athena Custom Field Name | athena Custom Field ID | HL7 Field | HL7 Assigning Authority (ex: |34567^^^CMRN^S~12345^^^EMPI^D|) |
|  |  | PID.3 |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

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

Additional comments:

 By default, the information in the above tables is applied to both inbound and outbound when available.

* 1. Backfills and Imports
     1. Backfills via the Interface

An additional offering is for athenaNet to receive or send a full load of all patients and/or chart data between the other systems just as the interface is first enabled. This type of data load may require a separate project with additional costs, managed outside of the Interface Project for ‘load management planning’ as well as General Council review, for appropriateness of PHI sharing.

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

Additional comments:

**BACKFILL PLANNING:** When planning a backfill, please consider the complexities of integrating data from several different systems. For example, most backfills from external applications include foreign IDs that will be written into athenaNet custom fields. These IDs should be unique and could potentially be bi-directionally accepted between all systems. Additionally, backfills can be done by data import or via the interface.

* + 1. Data Imports and Interfaces

Separate from any interface projects, a one-time file import of data may be required. These data imports are separate projects with different athenahealth Project Managers. Even though these projects are separate, the data they import may interact with the interface, so it is important to be aware of any Data Import projects.

Do you have other active or upcoming data import projects with athenahealth? If so, please describe here:

**DIFFERENCE BETWEEN A DATA IMPORT AND INTERFACE**:

**Timing**: Data imports are generally a one-time event for the purpose of loading existing data to athenaNet, whereas interfaces continue to operate going forward for an undefined period of time.

**Direction**: An interface is capable of sending data out or receiving data in, however a data import is for inbound data only.

**Format**: Most data imports are executed via flat-file (CSV spec) while most interfaces use industry-standard HL7.

* 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. Message Filtering and Control
      1. Selective Filtering of Outbound Messages

Select yes if you wish to apply any type of filtering to the outbound messages.

Should messages be filtered outbound (Y/N)?  No is recommended, where the interface will send all configured messages

 Selective filtering of outbound messages may incur additional cost

If yes, please describe:

* 1. Patients
     1. Patient Race, Ethnicity, and Language

For outbound patient messages, race and ethnicity can be sent in one of the following formats:

|  |  |  |
| --- | --- | --- |
| Race | Ethnicity | Code Set |
|  |  | CDC Identifier (Ex. For a race of “White Mountain Apache”, we would send “1019-9”) |
|  |  | Main CDC Identifier (Ex. For a race of “White Mountain Apache”, we would send “1002-5” This is the identifier for “AMERICAN INDIAN OR ALASKA NATIVE”) |
|  |  | Hierarchical Code (Ex. For a race of “White Mountain Apache”, we would send “R1.01.003.009”) |
|  |  | Main Hierarchical Code (Ex. For a race of “White Mountain Apache”, we would send “R1” This is the hierarchical code for “AMERICAN INDIAN OR ALASKA NATIVE”) |
|  |  | English Name (Ex. “White Mountain Apache”) |
|  |  | Main English Name (Ex. “American Indian or Alaska Native”) |
|  |  | AthenaNet ID |

For outbound patient messages, language can be sent in one of the following formats:

|  |  |
| --- | --- |
| Language | Code Set |
|  | ISO6392 Code (Ex. For English, we would send “eng”) |
|  | ISO6391 Code (Ex. For English, we would send “en”) |
|  | English Name (Ex. For English, we would send “English”) |
|  | AthenaNet ID |

For all options (except for athenaNet ID) in the above two tables, if the patient declined option was chosen, “Patient Declined” would be sent.

* 1. Charts
     1. Code Sets Sent

The following table outlines the available clinical code sets for discrete data elements sent in the chart messages. The athenahealth recommended options have been preselected.

|  |  |  |
| --- | --- | --- |
| Clinical Data |  | Code Set |
| Vitals |  | LOINC |
| Family History |  | SNOMED |
| Allergies |  | First Data Bank (FDB), RxNorm (where available), SNOMED (for reaction & severity) |
| Medications |  | First Data Bank (FDB), RxNorm (where available) |
| Problems |  | SNOMED or ICD-10 |
| Diagnoses |  | ICD-10 |
|  |  | SNOMED (only applicable for Episodic Clinical Data messages, in other messages ICD-9 will be sent) |
| Vaccines |  | CVX |
| Procedures/ Surgical History |  | CPT (where available) |
| Labs |  | athena Global Lab Order Types |
|  |  | LOINC (only will be sent when available, when not available athena Global Lab Order Type will be sent) |

Additional Comments:

1. Inbound Message Configuration

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

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. 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. 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:

