

AdvancedMD API Documentation

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API Documentation

Updated October 2025

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Introduction

Welcome to the AdvancedMD Application Program Interface (API). The API is the middle tier of the entire AdvancedMD platform. The rule of thumb is that anything you can do in the user interface of AMD you can do with the API. It is a true integration tool that will allow you to go as deeply or as lightly as you need into the application.

AdvancedMD uses XML to request data from the server, and to request data inserts and updates. Those requests are brokered by a COM+ component called PPMD_XMLRPC.ProcessRequest. This document lists the actions that are available for use by the client, and the format of the XML that the middle-tier components expect.

JSON requests and responses have also been implemented in a similar fashion, and examples will be included demonstrating the calls in JSON as well as XML.

This document can also be used by third-party developers as a reference to the AdvancedMD API.

XML Format

Actions

The request broker (**PPMD_XMLRPC.ProcessRequest::GetXML()**) expects an XML string in the following format:

```
<ppmdmsg action="action" class="class" msgtime="current time"
[additional attributes required by action]>
    <usercontext ... />
    [additional child elements as required by the action]
</ppmdmsg>
```

The **additional attributes** and **additional child** elements that are required are indicated below with each action. Some actions require only one or more attributes in the **ppmdmsg** element and no child elements, while others only child elements, and others require both.

Results

All results from the server should be in the following format:

```
<PPMDResults>
    Results
    [Child elements as provided by the action]
</Results>
<Error>
    [If any errors occurred...]
    <Fault .../>
</Error>
</PPMDResults>
```

If an error message is returned, the meaning of that message should be listed in [Hard Coded Values](#).

JSON Format

JSON Requests are parsed into XML format by the request broker, and results from the server are parsed from XML back into JSON. Be sure to specify the following:

- Content type: application/json
- Accept: application/json
- URL = <https://pro-viderapi.advancedmd.com/practicemanager/xmlrpc/processrequest.aspx>

(the "x" tells the system to use the JSON broker)

- All Usercontexts(Tokens) must be passed with each call and cannot be stored as a cookie

Requests

The request broker (PPMD_XMLRPC.ProcessRequest::GetXML()) expects a JSON string in the following format:

```
{
    "ppmdmsg": {
        "@action": "action",
        "@class": "class",
        "@msgtime": "current time ",
        (Additional objects, key value pairs, and arrays as
         required by the action)
    }
}
```

The additional objects, key value pairs, and arrays that are required are indicated below with each action. Some actions require only one or more key value pairs in

the ppmddmsg object and no child objects, while others only child objects, and others require both.

Results

All results from the server should be in the following format:

```
{
  "PPMDResults": {
    "Results": {
      (Results are displayed here as key value pairs,
objects, and arrays.)
    }
  }
}
```

JSON error reporting is currently limited and an Error object similar to the XML implementation does not exist. @ signs are also included at the beginning of lowest level key names in the result.

Documentation Notes

ID Attributes:

In most cases, identifiers in XMLRPC messages are prefixed, depending on the type of item being referenced. For example, the identifier for a patient's default responsible party may be "resp1234". When sending requests to the server, the prefixes are not required, but nearly all IDs in the response messages will have prefixes, so they will need to be handled accordingly.

Notable exceptions to this rule are the API class requests, none of which require or return ID prefixes.

Required Attributes:

In the sample documents below, required attributes are italicized.

Hard-coded Lists:

Some message attributes are based on hard-coded lists. For example, a relationship of **2** indicates that the patient is the spouse of the responsible party. These hard-coded lists can be found in [Hard Coded Values](#).

Forced Uppercase:

All text that is submitted to the server is switched to uppercase before it is stored in the database. Most of the samples below contain attributes in mixed or lowercase, but they appear in the PM user interface as uppercase and are ultimately stored in uppercase in the database.

Dates:

Dates generally appear in one of three formats:

- Short (display) format: mm/dd/yyyy

If the only reason for returning the date is to display it to the user, then it is generally formatted for display before it is returned to the client.

- Long VB format: mm/dd/yyyy h:nn:ss AM/PM

Most older requests that include dates that are actually used at the server or on the client for sorting or filtering use the standard VB format.

- Long ISO8601 format: yyyy-mm-ddThh:nn:ss[.mmm]

Most newer requests have begun to use the ISO8601 format, because it is the standard most readily consumed by XSL-T. Examples: "2015-03-13T12:15:33.623", "2015-03-13T12:15:33".

At this point, it is always safe to use the Short or Long VB format when posting requests, but be prepared to deal with various formats in the results.

Requirements and Usage Restrictions

Application Name

Note: *This is required.*

AdvancedMD requires that you have registered an application name with us before you can go into production. Please use "TEMP" during your development phase. Failure to register your application name prior to going live will cause your login request to be rejected. Here are the steps required to register that application name:

The appname attribute resides in the login API call:

```
<ppmdmsg action="login" class="login" msgtime="7/23/2015
3:29:16 PM"
    username="johndoe" psw="password123" officecode="150000"
    appname="INSERTAPPNAMEHERE"/>
```

Choose an appname that is representative of the name of your interface or product.

AppName requests for registration can be submitted by visiting <https://www.advancedmd.com/support/interoperability/> and selecting **Want a certification meeting**.

AdvancedMD will then register the application name against the office key(s) that it is using. Names such as "API", "user name" or "my interface" that are not representative of the product will be rejected when we go to register them.

Once you receive confirmation that the app name is registered, the application can be updated in the login call with the application name.

TLS 1.2 Requirement

Note: *This is required.*

All interfaces are required to support TLS 1.2 due to security. Please be sure the application(s) are compliant with this.

API Usage Restrictions

Usage of the API has some specific restrictions to avoid performance issues in client databases.

- Please restrict the frequency and nature of application calls to the API in accordance with the following conditions:
- This is the official list of call for the limits. All other calls are considered Low Impact.

You can determine the relevant level of impact assigned to a given API call by calling this API:

[https://providerapi.advancedmd.com/apicost/\[class\]/\[action\]](https://providerapi.advancedmd.com/apicost/[class]/[action])

Example:

<https://providerapi.advancedmd.com/apicost/api/getupdatedvisits>

Peak Hours: The hours between 6:00 AM (Mountain Time) and 6:00 PM (Mountain Time), Monday through Friday.

Tier 1 – High–Impact Calls

- During Peak Hours, no more than one (1) call per minute per office key.
- All other times, no more than 60 application calls per minute per office key.
- Examples of "High–Impact Calls" include, but are not limited to, GETUPDATEDVISITS and GETUPDATEDPATIENTS.

Tier 2 – Medium–Impact Calls

- During Peak Hours, no more than 12 application calls per minute per office key.
- All other times, no more than 120 application calls per minute per office key.

- Examples of "Medium-Impact Call" include, but are not limited to, SAVECHARGES, GETDEMOGRAPHIC, GETDATEVISITS, UPDVISITWITHNEWCHARGES, GETTXHISTORY, GETAPPTS, and GETPAYMENTDETAILDATA.

Tier 3 – Low-Impact Calls

- During Peak Hours, no more than 24 application calls per minute per office key.
- All other times, no more than 120 application calls per minute per office key.
- Examples of "Low-Impact Calls" include, but are not limited to, all "LOOKUP" APIs.

API utilization volume will be measured in one-minute intervals. Any application that exceeds the above restrictions (on average, per minute) during any one-minute interval will be in violation of this policy.

If you exceed the threshold, you will see the following error message:

Apigee login Examples (0)

POST https://advancedmd-prov-test.apigee.net/processrequest/sl1-api01/API1/xmlrpc/processr... Params Send Save

Authorization Headers (3) **Body** Pre-request Script Tests Cookies Code

☐ form-data ☐ x-www-form-urlencoded ☒ raw ☐ binary XML (text/xml)

```

1 <ppmdmsg action="login" class="login" msgtime="3/9/2018 9:58:36 PM" username="troyapi" psw="P@ssw0rd!" officecode="770034" appname="API" />

```

Body Cookies Headers (4) Test Results Status: 429 Too Many Requests Time: 59 ms Size: 636 B

Pretty Raw Preview XML Save Response

```

1 <PPMDResults>
2 <Results/>
3 <Error>
4 <Fault>
5   <faultcode>Client</faultcode>
6   <faultstring>Client Error</faultstring>
7   <detail>
8     <code>429</code>
9     <description>Too many requests. For this type of request, you are permitted 60 per hour. (In order to accommodate
        intermittent bursts, our servers will permit 5 request(s) every 1 minute(s) before rejecting requests
        .)</description>
10    <extrainfo/>
11  </detail>
12 </Fault>
13 </Error>
14 </PPMDResults>

```

Failure to comply with this may result in the following penalties:

- If an application exceeds the utilization volume limitations described in 2, a fee of one (1) cent will be charged to the Integration Developer responsible for the application (not to our mutual customer) for each excess API call.

Streamed vs. Non-Streamed Requests

There is a limitation, and required changes, if the application is going to exceed 10 MB in the request or result set. Requests/Results over 10 MB are required to be sent as a Streamed request.

- If the application is going to send requests and get result sets that are under 10 MB (this is generally most interfaces) you can set the interface to be non-streamed.
- If the application is going to exceed 10 MB requests/results it will need to send Streamed requests. The UPLOADFILE API call is an example that will normally exceed the 10 MB limit.
 - In a streamed request the License Key (officekey), Action, and Class need to be set in the header of the message outside the <ppmdmsg> when creating the body of the message.

Example of a Header:

Key	Value
Cookie	token={{TOKEN}}
officekey	{{OFFICEKEY VALUE}}
class	api
action	uploadfiles

- The format of this will vary between languages.
- URL for streamed requests: https://-
providerapi.advancedmd.com/streamrequest/api-100/TEMP/xml-
lrpc/streamrequest.aspx

In which api-100 is the HOST returned from the initial redirect method, and TEMP is the APPNAME.

- There is a limit on the file size to be uploaded using this method, it cannot exceed 20Mb.

Post Messages

Requests are sent to the AdvancedMD server by posting an XML message to an Active Server Page (ASP). This is the URL that you must use for the AdvancedMD API:

<https://partnerlogin.advancedmd.com/practicemanager/xmlrpc/processrequest.aspx>

The following C# sample illustrates the process:

```
public static string Send(string message, string url, string
cookie){
    // Set the certificate policy to our custom pass through
    policy so that
    // SSL requests will work.
    ServicePointManager.CertificatePolicy = new
    PassThroughCertificatePolicy();

    Uri uri = new Uri(url);
    HttpWebRequest request = (HttpWebRequest)WebRequest.Create
    (uri.ToString());
    request.CookieContainer = new CookieContainer();

    // Transfer the active cookies to the request. We are
    primarily interested
    // in getting the usercontext cookie (token).
    if (cookie != null && cookie != string.Empty)
    {
        request.CookieContainer.SetCookies(uri, cookie);
    }
    request.Method = "POST";
    request.ContentType = "text/xml";
    // Send the request
    XmlTextWriter writer = new
    XmlTextWriter(request.GetRequestStream(),
    System.Text.Encoding.UTF8);
    writer.Namespaces = false;
```

```
writer.WriteLine(message);  
writer.Flush();  
writer.Close();  
  
// Return the response  
HttpWebResponse response =  
(HttpWebResponse)request.GetResponse();  
StreamReader reader = new StreamReader  
(response.GetResponseStream());  
  
return reader.ReadToEnd();  
}
```

The process in a nutshell is:

1. Get a URL.
2. Get a request object for that URL.
3. Set the cookie for the request.
4. Set the method and content type.
5. Write the request to the stream – get and read the response.

Login and Re-Direct Process

Note: *This is required.*

AdvancedMD uses login redirection to allow base URLs to be changed without affecting the ability of interfaces to connect to the system. When AdvancedMD deploys a version upgrade to our systems we use a staged, multiple-wave release process, during which not every office key is pointing to the same version of the application. In order to allow different keys to point to different servers we redirect the key at the time of login.

Required URL to be used for initial login request:

<https://partnerlogin.advancedmd.com/practicemanager/xmlrpc/processrequest.aspx>

The first step is to login. The message to login looks like this:

Sample XML:

```
<ppmdmsg action="login"
  class="login"
  msgtime="8/23/2022 3:29:16 PM"
  username="johndoe"
  psw="password123"
  officecode="991NNN"
  appname="INSERTAPPNAMEHERE"/>
```

This will generate the redirect error message, with a "success" attribute of "0", a <usercontext> node with no main text, and an Error Fault Code of -2147220476, looking something like this:

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
```

```

<PPMDResults s="PRDAPI2WFES8VVD"
lst="8/26/2022 10:59:06 AM">
  <Results success="0">
    <usercontext
webserver="https://providerapi.advancedmd.com/processrequest/a
pi-101/INSERTAPPNAMEHERE"
      reportingServerURL="https://reportingservices-
100.advancedmd.com/rs/reportrequest.aspx"
      helpurl="https://ow2-help-01-
prd.advancedmd.com/help/"
      username="johndoe"/>
    </Results>
    <Error>
      <Fault>
        <faultcode>Client</faultcode>
        <faultstring>Client Error</faultstring>
        <detail>
          <code>-2147220476</code>
          <description>The Office Key 991NNN must be
redirected to
https://providerapi.advancedmd.com/processrequest/api-
101/INSERTAPPNAMEHERE. When logging in to AdvancedMD, if no
security token (<usercontext> text) is returned, then
you must redirect your login to the server indicated in the
"webserver" attribute of the usercontext
element.</description>
          <class>C:\azp\agent\_
work\4\s\AdvancedMD.Security\Login.cs</class>
          <method>LoginUser</method>
          <linenum>508</linenum>
          <source>AdvancedMD.Security.Login.AdvancedMD.S
ecurity.Login</source>
          <extrainfo/>
        </detail>
      </Fault>
    </Error>
  </PPMDResults>

```

After receiving a redirect error message, you must parse out the webserver attribute from the <usercontext> node of the <Results> node of the returned <PPMDResults> and concatenate "/xmlrpc/processrequest.aspx" onto the end of it, to form the Complete XMLRPC URL.

Example:

```
If webserver =  
"https://providerapi.advancedmd.com/processrequest/api-  
101/INSERTAPPNAMEHERE"  
  
Complete XMLRPC URL =  
"https://providerapi.advancedmd.com/processrequest/api-  
101/INSERTAPPNAMEHERE/xmlrpc/processrequest.aspx"
```

Once you have constructed the Complete XMLRPC URL, use it to send the exact same login request body that you used, initially, to the new redirect destination.

If the redirected login request succeeds, it will come back with a "success" attribute of "1" and the <usercontext> node will contain a security token as its main text. It should look something like this:

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>  
<PPMDResults s="PRDAPI2WFEUHF6" lst="8/31/2022 2:43:18 PM">  
<Results success="1" api="0" ...>  
  <usercontext ...  
    webserver="https://providerapi.advancedmd.com/processrequest/a  
    pi-101/INSERTAPPNAMEHERE" ...  
    ...>991NNNzxrAdklbl1lx2CAZrB9H1+Grco7wa1VmxmpoBGW+4BG+RrmF...b  
    lahblahblah</usercontext>  
  </Results>  
  <Error />  
</PPMDResults>
```

After a successful redirect login, you should save:

- The Security Token (returned as the main text of the <usercontext> node)
- The "webserver" attribute

You will be required to pass in the Security Token on all subsequent API calls to that same office key (XMLRPC and REST).

There are three ways the security token can be passed-in to subsequent API calls:

- For XMLRPC API Calls
 - As a Cookie, named "token" – in other words, include a Header named "Cookie" with a value of "token={insertsecuritytokenhere}".
 - In the Body of the request, as the main text of the <usercontext> element, which must be the first child node of the <ppmdmsg> element. In this case, the "nocookie" attribute of the <ppmdmsg> element must also be set to "1".
- For REST API Calls
 - As the value of a bearer token.

Note: *This token is good for 24 hours. You will need to have your interface login and refresh this token every 24 hours*

URL Construction

The "webserver" attribute should have been saved during the Login and Re-direct Process for a particular office key.

For XMLRPC API Calls (after the initial login request):

The complete URL is built by taking the "webserver" attribute value and adding "/xmlrpc/processrequest.aspx" onto the end of it.

Example:

If the saved webserver attribute is:

`https://providerapi.advancedmd.com/processrequest/api-102/INSERTAPPNAMEHERE`

Then the Complete XMLRPC URL would be:

`https://providerapi.advancedmd.com/processrequest/api-102/INSERTAPPNAMEHERE/xmlrpc/processrequest.aspx`

For Practice Manager REST API Calls:

The Base URL is built by taking the "webserver" attribute and replacing the word "processrequest" with "api" and then adding the Relative REST API path onto the end of it.

Example:

If the saved webserver attribute is:

`https://providerapi.advancedmd.com/processrequest/api-102/INSERTAPPNAMEHERE`

And the Relative REST API path = `"/masterfiles/olsprofiles"`

Then the Base REST API URL would be:

https://providerapi.advancedmd.com/api/api-102/INSERTAPPNAMEHERE/masterfile/olsprofiles

And the Complete REST API URL for a corresponding GET call would be:

https://providerapi.advancedmd.com/api/api-102/INSERTAPPNAMEHERE/masterfile/olsprofiles/{id}

For EHR REST API Calls:

The Base URL is built by taking the "webserver" attribute and replacing the word "processrequest" with "ehr-api" and then adding the Relative REST API path onto the end of it.

Example:

If the saved webserver attribute is:

https://providerapi.advancedmd.com/processrequest/api-102/INSERTAPPNAMEHERE

And the Relative REST API path = "/files/documents"

Then the Base REST API URL would be:

https://providerapi.advancedmd.com/ehr-api/api-102/INSERTAPPNAMEHERE/files/documents

then the Complete REST API URL for a corresponding GET call would be:

https://providerapi.advancedmd.com/ehr-api/api-102/INSERTAPPNAMEHERE/files/documents/{id}

Algorithms

****DISCLAIMER*** The following algorithms are extremely high level designs and require more design effort prior to their successful implementation. These algorithms are meant to be our recommendations, but are not the only way to solve these problems. In the past, there have been some misunderstandings about how best to use the methods that are documented here to accomplish some of the standard tasks that AdvancedMD API Developers encounter. We hope that this section will aid in that understanding.*

Initially Loading the Client's Data

Method 1 (All Data): Use the data export tool from the AdvancedMD application to obtain a Microsoft Access database copy of your client's data.

Method 2 (Demographic Data only): You may use the following algorithm to establish your demographic data: (Don't use the getUpdatedPatients method)

1. Make an initial call to LookupPatients or getUpdatedPatients to generate a paginated list of all patients that exist. You will want a simple list of patient IDs.
2. Iterate through each patient in the list and each page available to you in the call.
3. For each patient ID you need to make a call to getDemographics. This will give you detailed information for each patient.
4. Load this data to your database.

Method 3 (Visit Data only):

1. Use the getDateVisits API method.
2. Iterate through the dates that you need to retrieve using the getDateVisits API method.
3. Load pertinent data to your database from the list of visits returned.

Note: *GetUpdatedPatients and GetUpdatedVisits calls are not intended to be used as looping control mechanisms to initially setup a copy of your client's demographics. The amount of data that is returned in order for the call to return all patients or visits is too great to be efficient, but if the interval is not set to be long enough it will not return all of the patients in the database. Thus, it is mandatory that the lookuppatient api be used to control the loop.*

Synchronizing Your Database

Demographics: getUpdatedPatients

1. Make a call to the getUpdatedPatients api method using the last saved "server-time" value.
2. Iterate through the list of returned patients.
3. Dependent upon the "updatestatus" attribute set on each returned patient, update your database appropriately.

Visits: getUpdatedVisits

1. Make a call to the getUpdatedVisits api method using the last saved "server-time" value.
2. Iterate through the list of returned visits.
3. Dependent upon the "updatestatus" attribute set on each returned visit, update your database appropriately.

Note: *In order to keep your demographics in sync with the client's database use the getUpdatedPatients or getUpdatedVisits API methods. Once the data has been initially downloaded, it is imperative that the servertime attribute is logged so that when the sync process is started you will know the correct date to start the getUpdatedPatients or getUpdatedVisits call with. Every subsequent call made to getUpdatedPatients or getUpdatedVisits MUST use the server time that is returned in the prior xml response.*

Repeated getUpdatedPatient calls: Please make sure you understand the importance of servertime in the response from AdvancedMD and datachanged

attribute in the request you send. When a response comes back from AdvancedMD, store the servertime value and use this value in the datechanged attribute when the next call is made to getUpdatedPatients. Do not adjust the servertime value with the time zones.

Maximum number of calls is 1 per minute.

Visit Actions

Add Visit for a Patient

Action: addvisit

Add a visit for a specific patient. This visit will be associated with a provider profile and the visit date specified in the visit request.

Sample XML:

```
<ppmdmsg action="addvisit" class="chargeentry"
msgtime="12/16/2015 1:40:22 PM">
  <appt patient="4140" profile="14" date="" refplan="62695"/>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "addvisit",
    "@class": "chargeentry",
    "@msgtime": "12/16/2005 1:40:22 PM",
    "appt": {
      "@patient": "4140",
      "@profile": "14",
      "@date": ""
    }
  }
}
```

Attributes:

patient: This is the patient's ID that you are creating a visit for.

profile: This is the profile ID. You can get a list of provider profiles with lookup calls (explained later in the document).

date: Leave the date attribute as an empty string and the visit will be created for today.

refplan: If you'd like to link a referral plan to the visit, include the referral plan ID here.

Results:

This action returns a <visit> element that contains the attributes for the newly created visit. As this is a new visit, you will always have an empty <chargelist> element or object.

Sample XML:

```
<?xml version="1.0"?>
<PPMDResults>
  <Results>
    <visit id="vst158089" date="12/16/2005" isappt="0"
profile="prof14" episode="eps4147" insorder="" note=""
forcepaper="0">
      <chargelist/>
      <extins/>
    </visit>
    <notelist/>
  </Results>
  <Error/>
</PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0"
  },
  "PPMDResults": {
    "Results": {
      "visit": {
```

```
    "@id": "vst158089",
    "@date": "12/16/2005",
    "@isappt": "0",
    "@profile": "prof14",
    "@episode": "eps4147",
    "@insorder": "",
    "@note": "",
    "@forcepaper": "0",
    "changelist": null,
    "extins": null
  },
  "notelist": null
},
"Error": null
}
}
```

Get New and Modified Visits

Action: getupdatedvisits

Notes:

- This call can now also bring back updated charges if the <charge> node is specified.
- The attribute, **ignoreappttypes**, when set to **1** allows to return visits that do not have an appointment type assigned, (previously this action could only search for visits with appointment type assigned). If attribute is not specified it's value defaults to **0** to preserve previous behavior and only return visits with appointment type assigned.

Sample XML:

```
<ppmdmsg action="getupdatedvisits" class="api"
msgtime="7/24/2015 10:20:42 AM" datechanged="2015-03-
24T8:25:28.730" visitid="1234" ignoreappttypes="1">
    <visit date="VisitDate" duration="Duration" color="Color"
/>
    <patient name="Name" ssn="SSN" changedat="ChangedAt"
createdat="CreatedAt" />
    <insurance carname="CarName" carcode="CarCode"
carcity="CarCity" changedat="ChangedAt"
createdat="CreatedAt"/>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getupdatedvisits",
    "@class": "api",
    "@msgtime": "7/24/2015 10:20:42 AM",
```

```

    "@datechanged": "2015-03-24T8:25:28.730",
    "@visitid": "1234",
    "@ignoreappttypes": "1",
    "visit": {
        "@date": "VisitDate",
        "@duration": "Duration",
        "@color": "Color"
    },
    "patient": {
        "@name": "Name",
        "@ssn": "SSN",
        "@changedat": "ChangedAt",
        "@createdat": "CreatedAt"
    },
    "insurance": {
        "@carname": "CarName",
        "@carcode": "CarCode",
        "@carcity": "CarCity",
        "@changedat": "ChangedAt",
        "@createdat": "CreatedAt"
    }
}
}

```

Results:

This request returns a <visitlist> element or object that contains a list of all visits (appointments) that have been modified or added since the specified date. ("Modified" appointments do not include those whose patient information has been modified. If the caller is interested in updating patient information, a separate getupdatedpatients request should be made.)

If the <patient> element is included then each <visit> element will contain a <patient> element that contains information about the patient associated with

the visit. Likewise, if the <insurance> element is included, then each patient's insurance info will be returned. All insurance coverages will be included.

In addition, if the <charge> element is included, then each patient's charge info will be returned if that charge was updated within the requested time frame.

(In most cases, the client EMR system will synchronize both the patient list and the visits contained in AdvancedMD, and so two requests will be made each time the synchronization takes place, one to synchronize the patient list, and another to update visits.)

Every returned element will contain an ID attribute. The <visit> element will also include an "updatestatus" attribute that indicates why the patient was returned:

- N: The visit was added since the specified date.
- C: The visit has been modified.
- D: The visit existed prior to the specified date, but has since been deleted or a charge has been posted to it.

The <charge> element will also include an "updatestatus" attribute that indicates why the charge was returned:

- N: The charge was added since the specified date.
- C: The charge has been modified.
- D: The charge existed prior to the specified date, but has since been deleted or voided.

If a charge is status C, then the details of any payments and write offs can be returned using the gettxhistory call.

In addition to the above standard attributes, each element can also contain any of a large number of optional attributes, which must be identified by the calling application. For example, in the sample request above, the calling application has specified that the patient elements should include the visit date ("VisitDate"), and the attribute should be "date". A list of available fields can be retrieved by calling the getupdatedvisitstemplate action, described in this document.

Sample XML:

```

<PPMResults>
  <Results servertime="2015-03-25T8:25:35.730"
patientcount="1">
    <visitlist>
      <visit id="6123" date="03/27/2015"
updatestatus="C" duration="15" color="RED">
        <patient id="198511" name="CARD,ANDY"
ssn="123121234" changedat="2015-03-24T12:54:12.493"
createdat="2015-04-23T09:26:45.953">
          <insurance id="7126" seqnum="1"
carname="BAKERY AND CONFICTIONARY" carcode="BAKE1"
carcity="KENNSINGTON" changedat="2015-07-09T15:21:17.633"
createdat="2015-05-01T09:44:49.440" />
          <chargelist>
            <charge id="5080983" updatestatus="C"
CreatedAt="2020-02-04T13:41:48.117" ChangedAt="2020-02-
04T14:29:12.717" PostingDate="2020-02-04T13:41:48.117"
BeginDateOfService="2017-10-18T00:00:00"
EndDateOfService="2017-10-.440" />
            18T00:00:00" fee="152.0000" units="1.0"
patientportion="152.0000" insbalance="0.0000"
patbalance="2.0000" DiagnosisCodes=""
DiagnosisCodesICD10="Z67.90" Modifiers="" chargecode="99214"
posvalue="11" tovalue="01"
            financialclasscode="SP" />
          </insurancelist>
        </chargelist>
      </patient>
    </patientlist>
  </visit>
</visitlist>undefined</Results>undefined</PPMResults>

```

Sample JSON:

```

{
  "PPMResults": {
    "Results": {
      "@servertime": "2015-02-26T10:44:26.943",

```

```

"@visitcount": "1",
"visitlist": {
  "visit": {
    "@id": "110609",
    "@date": "02/25/2015",
    "@duration": "20",
    "@color": "ORANGE    ",
    "@updatestatus": "C",
    "patientlist": {
      "patient": {
        "@id": "159",
        "@name": "DEAN,MEGAN",
        "@ssn": "          ",
        "@changedat": "2012-09-01T12:32:23.797",
        "@createdat": "2007-07-10T14:03:07.09",
        "insurancelist": {
          "insurance": [
            {
              "@id": "142",
              "@carname": "MONTGOMERY HEALTH INSURANCE",
              "@carcode": "MON02",
              "@carcity": "MONTGOMERY",
              "@changedat": "2007-07-10T14:03:58.403",
              "@createdat": "2007-07-10T14:03:44.34"
            },
            {
              "@id": "143",
              "@carname": "BLUE CROSS BLUE SHIELD
ALABAMA",
              "@carcode": "BLU32",
              "@carcity": "BIRMINGHAM",
              "@changedat": "2007-07-10T14:04:03.183",
              "@createdat": "2007-07-10T14:03:44.34"
            }
          ]
        }
      }
    }
  }
}

```

On occasion, this method may attempt to update 1000 visits or more depending on the "datechanged" attribute sent in and activity on the office key. When more than 1000 results match the filtering criteria the response xml will differ from what was requested in order to improve response time. When this occurs the response will include just the visit IDs of all of the visits that would have otherwise been returned in a <visitlist> element. In addition to the <visitlist> a client error, code -2147217350, will be returned so that you will be properly notified of what has occurred. After trapping the client error save the <visitlist> element in order to resubmit the resulting visit IDs in subsequent calls to getupdatedvisits. Next, resubmit the visit IDs in smaller chunks of 500 patients or fewer. For example, the call below would return a response with all of the requested data for the three patient visits with the given IDs:

Sample XML:

```
<ppmdmsg action="getupdatedvisits" class="api"
msgtime="7/24/2015 10:20:42 AM" datechanged="2015-03-
24T8:25:28.730">

  <visitlist>

    <visit id='123' />

    <visit id='456' />

    <visit id='789' />

  </visitlist>

  <visit date="VisitDate" duration="Duration" color="Color"
 />
```

```
<patient name="Name" ssn="SSN" changedat="ChangedAt"
createdat="CreatedAt" />
<insurance carname="CarName" carcode="CarCode"
carcity="CarCity" changedat="ChangedAt"
createdat="CreatedAt"/>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getupdatedvisits",
    "@class": "api",
    "@msgtime": "2/26/2015 11:55:41 AM",
    "@datechanged": "1/26/2015 11:55:41 AM",
    "visitlist": {
      "visit": [
        {
          "@id": "123"
        },
        {
          "@id": "456"
        },
        {
          "@id": "789"
        }
      ]
    },
    "visit": {
      "@date": "VisitDate",
      "@duration": "Duration",
      "@color": "Color"
    },
    "patient": {
```

```

        "@name": "Name",
        "@ssn": "SSN",
        "@changedat": "ChangedAt",
        "@createdat": "CreatedAt"
    },
    "insurance": {
        "@carname": "CarName",
        "@carcode": "CarCode",
        "@carcity": "CarCity",
        "@changedat": "ChangedAt",
        "@createdat": "CreatedAt"
    }
}
}

```

A developer may also want to retrieve the results for a single visit at a time. A "visitid" attribute exists on the root <ppmdmsg> element that will allow for this. Using this method may return a response more quickly, but is simply a different way to retrieve the visit information for a selected visit. For example:

Sample XML:

```

<ppmdmsg action="getupdatedvisits" class="api"
msgtime="7/24/2015 10:20:42 AM" datechanged="2015-03-
24T8:25:28.730" visitid="1234">
    <visit date="VisitDate" duration="Duration" color="Color"
/>
    <patient name="Name" ssn="SSN" changedat="ChangedAt"
createdat="CreatedAt" />
    <insurance carname="CarName" carcode="CarCode"
carcity="CarCity" changedat="ChangedAt"
createdat="CreatedAt"/>
</ppmdmsg>

```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "getupdatedvisits",
    "@class": "api",
    "@msgtime": "7/24/2015 10:20:42 AM",
    "@datechanged": "2015-03-24T8:25:28.730",
    "@visitid": "1234",
    "visit": {
      "@date": "VisitDate",
      "@duration": "Duration",
      "@color": "Color"
    },
    "patient": {
      "@name": "Name",
      "@ssn": "SSN",
      "@changedat": "ChangedAt",
      "@createdat": "CreatedAt"
    },
    "insurance": {
      "@carname": "CarName",
      "@carcode": "CarCode",
      "@carcity": "CarCity",
      "@changedat": "ChangedAt",
      "@createdat": "CreatedAt"
    }
  }
}

```

Notes:

- The *<insurance>* element or object is optional.

- *If a visit has been added since the specified date and then deleted, that visit will not be returned in the results. Deleted visits will only be returned if they existed in the database prior to the specified date.*
- ***Repeated getupdatedvisits calls:*** *Please make sure you understand the importance of servertime in the response from AdvancedMD and datachanged attribute in the request you send. When a response comes back from AdvancedMD, store the servertime value and use this value in the datechanged attribute when the next call is made to update visits. Do not adjust the servertime value with the time zones. This call was created to allow you to request the visits that have been added or modified within the past five minutes, hour, day or some relatively short time span. Maximum number of calls is 1 per minute.*

Get a List of Fields Available to "getupdatedvisits"

Action: getupdatedvisitstemplate

Sample XML:

```
<ppmdmsg action="getupdatedvisitstemplate" class="api"
msgtime="7/24/2015 10:33:06 AM">
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getupdatedvisitstemplate",
    "@class": "api",
    "@msgtime": "7/24/2015 10:33:06 AM"
  }
}
```

Results:

This request returns a template that "getupdatedvisits" requests can be based on. It includes every optional field that is available for the <visit>, <patient>, and <insurance> elements. The following sample document is a very small subset of the fields actually returned. The entire list can be found [here](#)

Sample XML:

```
<PPMDResults>
  <Results>
    <visit id="[auto]" updatestatus="[auto]"
visitdate="VisitDate" .../>
    <patient id="[auto]" lastname="LastName"
```

```

    firstname="FirstName" middlename="MiddleName" name="Name"
    chartnumber="ChartNumber" .../>

    <insurance id="[auto]" active="Active"
    sequencenumber="SequenceNumber"
    effectivestartdate="EffectiveStartDate"
    effectiveenddate="EffectiveEndDate" carcode="CarCode"
    carname="CarName" .../>

    </Results>

    <Error/>

</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "visit": {
        "@id": "[auto]",
        "@updatestatus": "[auto]",
        "@visitdate": "VisitDate"
      },
      "patient": {
        "@id": "[auto]",
        "@lastname": "LastName",
        "@firstname": "FirstName",
        "@middlename": "MiddleName",
        "@name": "Name",
        "@chartnumber": "ChartNumber"
      },
      "insurance": {
        "@id": "[auto]",
        "@active": "Active",
        "@sequencenumber": "SequenceNumber",
        "@effectivestartdate": "EffectiveStartDate",
        "@effectiveenddate": "EffectiveEndDate",

```

```
        "@carcode": "CarCode",
        "@carname": "CarName"
    }
},
"Error": null
}
```

Note: Attributes or key names can be named any valid attribute name. For example, if you are interested in the VisitDate field, you can call the attribute date, visit_date or visit_datetime. When you make the "getupdatedvisits" request, you indicate your attribute name as follows: attributename="FieldName", e.g. visit_date="VisitDate" or visit_datetime="VisitDate".

Get Visits for a Specific Patient

Action: getpatientvisits

Sample XML:

```
<ppmdmsg
  action="getpatientvisits"
  class="api"
  msgtime="12/31/2015 4:55:49 AM"
  patientid="15985"
  appttype=""
  appttypeid=""
  apptstatusid=""
  referral=""
  referringproviderid=""
  referringprovider=""
>
  <visit
    AppointmentTypeID="AppointmentTypeID"
    AppointmentType="AppointmentType"
    columnheading="ColumnHeading"
    ByReferringProviderFID="ByReferringProviderFID"
    ByRefProvLastName="ByRefProvLastName"
    ByRefProvFirstName="ByRefProvFirstName"
    ByRefProvMiddleName="ByRefProvMiddleName"
    apptstatus="ApptStatus"
    refreason="RefReason"
    duration="Duration"
    color="Color"
  />
  <patient name="Name" ssn="SSN" changedat="ChangedAt"
    createdat="CreatedAt" />
  <insurance
    carname="CarName"
    carcode="CarCode"
```

```
        changedat="ChangedAt"
        createdat="CreatedAt"
    />
</ppmdmsg>;
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getpatientvisits",
    "@referringprovider": ",R0",
    "@patientid": "15985",
    "@msgtime": "12/31/2015 4:55:49 AM",
    "@class": "api",
    "visit": {
      "@color": "Color",
      "@duration": "Duration",
      "@refreason": "RefReason",
      "@apptstatus": "ApptStatus",
      "@ByRefProvMiddleName": "ByRefProvMiddleName",
      "@ByRefProvFirstName": "ByRefProvFirstName",
      "@ByRefProvLastName": "ByRefProvLastName",
      "@ByReferringProviderFID": "ByReferringProviderFID",
      "@columnheading": "ColumnHeading",
      "@AppointmentType": "AppointmentType",
      "@AppointmentTypeID": "AppointmentTypeID"
    },
    "patient": {
      "@createdat": "CreatedAt",
      "@changedat": "ChangedAt",
      "@ssn": "SSN",
      "@name": "Name"
    }
  },
}
```

```

    "insurance": {
      "@createdat": "CreatedAt",
      "@changedat": "ChangedAt",
      "@carcode": "CarCode",
      "@carname": "CarName"
    }
  }
}

```

Results:

This request returns a < visitlist> element or object that contains a list of all open visits (appointments) for the specific patient.

If the <patient> element is included, then each <visit> element will contain a <patient> element that will have information about the patient associated with the visit. Likewise, if the <insurance> element is included, then each patient's insurance information will be returned. All insurance coverages will be included.

Every returned element will contain an ID attribute.

In addition to the above standard attributes, each element can also contain any of a large number of optional attributes, which must be identified by the calling application. For example, in the sample request above, the calling application has specified that the patient elements should include the column heading ("ColumnHeading"), and the attribute should be "columnheading".

Sample XML:

```

<PPMDResults>
  <Results servertime="2016-01-04T02:30:56.567"
  visitcount="7">
    <visitlist>
      <visit id="39532" AppointmentTypeID="165"
      AppointmentType="ANNUAL PAP" columnheading="DR. CLAVIN"
      ByReferringProviderFID="402" ByRefProvLastName="IVIE"

```

```

ByRefProvFirstName="ROY" ByRefProvMiddleName="K"
apptstatus="0" refreason="SELF-REFERRAL" duration="10"
color="BLUE">

    <patientlist>

        <patient id="15985" name="LALTY,CRUZ
DENISE" ssn="" changedat="2013-03-21T07:19:01.587"
createdat="2011-07-06T14:22:27.260">

            <insurancelist>

                <insurance id="16335"
carname="BLUE CROSS LA - OUT OF STATE PLANS" carcode="BLUE1"
changedat="1900-01-01T00:00:00" createdat="2011-07-
06T14:23:26.443" />

                <insurance id="16336"
carname="CIGNA CORPORATION" carcode="CIG04" changedat="1900-
01-01T00:00:00" createdat="2011-07-06T14:24:26.300" />

            </insurancelist>

        </patient>

    </patientlist>

</visit>

    <visit id="52786" AppointmentTypeID="165"
AppointmentType="ANNUAL PAP" columnheading="DR. CLAVIN"
ByReferringProviderFID="402" ByRefProvLastName="IVIE"
ByRefProvFirstName="ROY" ByRefProvMiddleName="K"
apptstatus="3" refreason="SELF-REFERRAL" duration="10"
color="BLUE">

    <patientlist>

        <patient id="15985" name="LALTY,CRUZ
DENISE" ssn="" changedat="2013-03-21T07:19:01.587"
createdat="2011-07-06T14:22:27.260">

            <insurancelist>

                <insurance id="16335"
carname="BLUE CROSS LA - OUT OF STATE PLANS" carcode="BLUE1"
changedat="1900-01-01T00:00:00" createdat="2011-07-
06T14:23:26.443" />

                <insurance id="16336"
carname="CIGNA CORPORATION" carcode="CIG04" changedat="1900-
01-01T00:00:00" createdat="2011-07-06T14:24:26.300"/>

            </insurancelist>

        </patient>

    </patientlist>

</visit>

</visitlist>

```

```
</Results>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "Results": {
      "@visitcount": "7",
      "@servertime": "2016-01-04T02:30:56.567",
      "visitlist": {
        "visit": [
          {
            "@color": "BLUE",
            "@duration": "10",
            "@refreason": "SELF-REFERRAL",
            "@apptstatus": "0",
            "@ByRefProvMiddleName": "K",
            "@ByRefProvFirstName": "ROY",
            "@ByRefProvLastName": "IVIE",
            "@ByReferringProviderFID": "402",
            "@columnheading": "DR. CLAVIN",
            "@AppointmentType": "ANNUAL PAP",
            "@AppointmentTypeID": "165",
            "@id": "39532",
            "patientlist": {
              "patient": {
                "@createdat": "2011-07-06T14:22:27.260",
                "@changedat": "2013-03-21T07:19:01.587",
                "@ssn": "",
                "@name": "LALTY,CRUZ DENISE",
                "@id": "15985",
                "insurancelist": {
```

```

        "insurance": [
            {
                "@createdat": "2011-07-06T14:23:26.443",
                "@changedat": "1900-01-01T00:00:00",
                "@carcode": "BLUE1",
                "@carname": "BLUE CROSS LA - OUT OF
STATE PLANS",
                "@id": "16335"
            },
            {
                "@createdat": "2011-07-06T14:24:26.300",
                "@changedat": "1900-01-01T00:00:00",
                "@carcode": "CIG04",
                "@carname": "CIGNA CORPORATION",
                "@id": "16336"
            }
        ]
    }
}
},
{
    "@color": "BLUE",
    "@duration": "10",
    "@refreason": "SELF-REFERRAL",
    "@apptstatus": "3",
    "@ByRefProvMiddleName": "K",
    "@ByRefProvFirstName": "ROY",
    "@ByRefProvLastName": "IVIE",
    "@ByReferringProviderFID": "402",
    "@columnheading": "DR. CLAVIN",
    "@AppointmentType": "ANNUAL PAP",
    "@AppointmentTypeID": "165",
    "@id": "52786",

```

```

"patientlist": {
  "patient": {
    "@createdat": "2011-07-06T14:22:27.260",
    "@changedat": "2013-03-21T07:19:01.587",
    "@ssn": "",
    "@name": "LALTY,CRUZ DENISE",
    "@id": "15985",
    "insurancelist": {
      "insurance": [
        {
          "@createdat": "2011-07-06T14:23:26.443",
          "@changedat": "1900-01-01T00:00:00",
          "@carcode": "BLUE1",
          "@carname": "BLUE CROSS LA - OUT OF
STATE PLANS",
          "@id": "16335"
        },
        {
          "@createdat": "2011-07-06T14:24:26.300",
          "@changedat": "1900-01-01T00:00:00",
          "@carcode": "CIG04",
          "@carname": "CIGNA CORPORATION",
          "@id": "16336"
        }
      ]
    }
  }
}

```

Notes: Below the list of attributes applicable for getting the patient visits:

- *patientid: (Required) This is the Patient ID*
- *appttype: (Optional) This is the Appointment Type name*
- *appttypeid: (Optional) This is the Appointment Type ID*
- *apptstatusid: (Optional) This is the Appointment Status ID*
- *referral: (Optional) This is the Referral Reason*
- *referringproviderid: (Optional) This is the Referring Provider ID*
- *referringprovider: (Optional) This is the Referring Provider name*

Get Visits for a Specific Date

Action: getdatevisits

Sample XML:

```
<ppmdmsg action="getdatevisits" class="api" msgtime="7/24/2015
10:20:42 AM" visitdate="9/26/2015">
  <visit columnheading="ColumnHeading" duration="Duration"
color="Color" apptstatus="ApptStatus"/><patient name="Name"
ssn="SSN" changedat="ChangedAt" createdat="CreatedAt" />
  <insurance carname="CarName" carcode="CarCode"
changedat="ChangedAt" createdat="CreatedAt"/>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getdatevisits",
    "@class": "api",
    "@msgtime": "7/24/2015 10:20:42 AM",
    "@visitdate": "9/26/2015",
    "visit": {
      "@columnheading": "ColumnHeading",
      "@duration": "Duration",
      "@color": "Color"
    },
    "patient": {
      "@name": "Name",
      "@ssn": "SSN",
      "@changedat": "ChangedAt",
      "@createdat": "CreatedAt"
    },
    "insurance": {
      "@carname": "CarName",
```

```

        "@carcode": "CarCode",
        "@changedat": "ChangedAt",
        "@createdat": "CreatedAt"
    }
}
}

```

Results:

This request returns a < visitlist> element or object that contains a list of all visits (appointments) on the specified date.

If the <patient> element is included, then each <visit> element will contain a <patient> element that will have information about the patient associated with the visit. Likewise, if the <insurance> element is included, then each patient's insurance information will be returned. All insurance coverages will be included.

Every returned element will contain an ID attribute.

In addition to the above standard attributes, each element can also contain any of a large number of optional attributes, which must be identified by the calling application. For example, in the sample request above, the calling application has specified that the patient elements should include the column heading ("ColumnHeading"), and the attribute should be "columnheading". A list of available fields can be determined by calling the getupdatedvisits template action as the template is the same as the updated visits.

Sample XML:

```

<PPMDResults>
  <Results servertime="2015-07-24T10:57:28.730"
    visitcount="7">
    <visitlist>
      <visit id="6123" columnheading="COL2"
        duration="15" color="RED">
        <patient id="198511" name="CARD,ANDY"

```

```

ssn="123121234" changedat="2015-09-26T10:04:12.493"
createdat="2015-09-26T10:04:12.493">
    <insurancelist>
        <insurance id="7126" seqnum="1"
carname="BAKERY AND CONFICTIONARY" carcode="BAKE1"
changedat="2015-07-09T15:21:17.633" createdat="2015-05-
01T09:44:49.440" />
    </insurancelist>
</patient>
</visit>
</visitlist>
</Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "@servertime": "2015-07-24T10:57:28.730",
      "@visitcount": "7",
      "visitlist": {
        "visit": {
          "@id": "6123",
          "@columnheading": "COL2",
          "@duration": "15",
          "@color": "RED",
          "patient": {
            "@id": "198511",
            "@name": "CARD,ANDY",
            "@ssn": "123121234",
            "@changedat": "2015-09-26T10:04:12.493",
            "@createdat": "2015-09-26T10:04:12.493",
            "insurancelist": {

```

```
    "insurance": {
      "@id": "7126",
      "@seqnum": "1",
      "@carname": "BAKERY AND CONFICTIONARY",
      "@carcode": "BAKE1",
      "@changedat": "2015-07-09T15:21:17.633",
      "@createdat": "2015-05-01T09:44:49.440"
    }
  }
}
}
}
}
}
```

Note: This method is recommended for use in retrieving a large amount of data. For example, using this method is preferred in order to retrieve a month, year, or several years of data. You should use this method to request all visits for a single day. You would need to submit the request repeatedly, once a day for the desired period of time you need. Once you have brought all of the visits down and synchronized your application, you can then begin to use the `getupdatedvisits` call to keep your database up-to-date.

Get Recall Visits

Action: getreminderrecallvisits

Retrieves a list of recall visits for the date range specified.

Sample XML:

```
<ppmdmsg action="getreminderrecallvisits" class="api"
msgtime="5/21/2015 1:28:12 PM"
startdate="1/3/2016" enddate="1/9/2016" maxrecalls="10" />
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getreminderrecallvisits",
    "@class": "api",
    "@msgtime": "5/21/2015 1:28:12 PM",
    "@startdate": "1/3/2016",
    "@enddate": "1/9/2016",
    "@maxrecalls": "10"
  }
}
```

Attributes:

startdate: Recall visits that are on or after this date.

enddate: Recall visits that are on or before this date.

maxrecalls: The maximum number of recall visits to return. This can be used to limit the number of recall visits incase there are a large number of them within the date range specified.

Results:

The result set will have a list of recall visits.

Sample XML:

```
<?xml version="1.0"?>
< PPMDResults s="servername">
  <Results patientcount="1">
    <recalllist>
      <recall id="3858" recalldate="2015-01-04T00:00:00"
recallappttype="">
        <patient id="84763" firstname="JOHN" lastname="DOE"
cellphone="" homephone="" officephone="" />
      < /recalllist>
    </Results>
  </PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0"
  },
  "PPMDResults": {
    "@s": "servername",
    "Results": {
      "@recallcount": "1",
      "recalllist": {
        "recall": {
          "@id": "3858",
          "@recalldate": "2015-01-04T00:00:00",
          "@recallappttype": "",
          "patient": {
            "@id": "84763",
            "@firstname": "JOHN",
            "@lastname": "DOE",
            "@cellphone": "",
            "@homephone": "",
```

```
        "@officephone": "",
        "@providerprofiledesc": ""
    }
}
}
}
}
```

Get Reminder Appointments

Action: getreminderappts

Gets appointments within a date/time range and certain criteria. It can confirm the same list of appointments at the same time.

Sample XML:

```
<ppmdmsg action="getreminderappts" class="api"
msgtime="12/16/2015 1:40:22 PM"

startdate="12/16/2015" enddate="12/16/2015" starttime="9:00
AM"

endtime="5:00 PM" apptstatus="0,1" appttype="NEW PATIENT,
PHYSICAL"

updconfirm="1" confirmmethod="BY PHONE"
returnunconfirmedonly="1"

newpatient="1" providerprofilecode="" excludeappttypes=""
excludecolumns=""/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getreminderappts",
    "@class": "api",
    "@msgtime": "12/16/2015 1:40:22 PM",
    "@startdate": "12/16/2015",
    "@enddate": "12/16/2015",
    "@starttime": "9:00 AM",
    "@endtime": "5:00 PM",
    "@apptstatus": "0,1",
    "@appttype": "NEW PATIENT,PHYSICAL",
    "@updconfirm": "1",
    "@confirmmethod": "BY PHONE",
    "@returnunconfirmedonly": "1",
```

```

    "@newpatient": "1",
    "@providerprofilecode": "AB",
    "@excludeappttypes": "1",
    "@excludecolumns": "1",
    "@columns": "COLUMN",
  }
}

```

Attributes:

startdate: An appointment has to be scheduled to start on or after this date and the "starttime" attribute.

enddate: An appointment has to start before or on this date and the "endtime" attribute.

apptstatus: A comma separated list of appointment statuses.

appttype: A comma separated list of appointment types that can further filter the types of appointments returned. This can either be inclusionary or exclusionary.

updconfirm: A 1 or 0 indicating if the caller would like to confirm the appointments returned in this api call.

confirmmethod: A confirmation method to use if the call is confirming appointments. If not supplied a confirmation method "INTERFACE" may be created on your system and used for the confirmation method if the updconfirm (above) attribute is 1.

returnunconfirmedonly: Only returns appointments that are unconfirmed.

newpatient: Further filters appointments with (set to 1) or without (set to 0) the appointment type "NEW PATIENT". If you do not specify this attribute no filtering will occur on the appointment type "NEW PATIENT" unless otherwise specified in the "appttype" attribute.

providerprofilecode: A comma separated list of provider profile codes that further filters the appointments returned based on the appointment having one of the codes specified.

exludeappttypes: Excludes (set to 1) or Includes (set to 0) appointments with the appointment types specified in the "appttype" attribute.

excludecolumns: Excludes (set to 1) or includes (set to 0) appointments that are in the columns specified in the "" attribute

columns: Further filters the appointments based on what column they appear in the scheduler. This list can be either inclusionary or exclusionary based on the "excludecolumns" attribute.

Results:

This request returns an <applist> element that contains <apt> elements with attributes for the appointments matching the specified criteria.

Sample XML:

```
<?xml version="1.0"?>
<PPMDResults>
  <Results>
    <apptlist>
      <appt id="158089" startdate="12/15/2015"
starttime="12:00 PM" location=""
providerprofiledesc="" primaryappttype="">
        <patient id="84763" firstname="JOHN" lastname="DOE"
cellphone="" homephone=""
officephone=""/>
      </appt>
    </apptlist>
  </Results>
  <Error/>
</PPMDResults>
```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0"
  },
  "PPMDResults": {
    "Results": {
      "apptlist": {
        "appt": {
          "@id": "158089",
          "@startdate": "12/15/2015",
          "@starttime": "12:00 PM",
          "@location": "",
          "@providerprofiledesc": "",
          "@primaryappttype": "",
          "patient": {
            "@id": "84763",
            "@firstname": "JOHN",
            "@lastname": "",
            "@cellphone": "",
            "@homephone": "",
            "@officephone": ""
          }
        }
      }
    },
    "Error": null
  }
}

```

Get Appointment Types

Action: getappttypes

Retrieves a list of appointment types.

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getappttypes",
    "@class": "masterfiles",
    "@msgtime": "1/25/2023 9:51:39 AM",
    "appttype": ""
  }
}
```

Results

Sample XML:

```
<PPMDResults s="PRDWAPI3WFEFXCT" lst="1/25/2023 9:05:55 AM">
  <Results>
    <appttypelist>
      <appttype
        id="ap_type11"
        name="COLPOSCOPY [DELETED]"
        default="1"
        billable="1"
        transitionofcare="0"
      />
    />
  />
```

```

hide="yes"
istelemedicine="0"
isols="0"
isgroupappt="0"
usecarriermaxtime="0"
requirereferral="0"
requireauthorization="0"
intakeformcount="0"
consentformcount="0"
includedemographicsform="0"
>
<appttypesettings
  id="ats7"
  profile=""
  hide="no"
  waitlistpriority="M"
  waitlistpriorityid="99"
  duration="30"
  color="BLUE"
  cstemplate="cst97"
  instr=""
  patientmessagingtemplate=""
  recallmessagingtemplate=""
/>
</appttype>
<appttype
  id="ap_type9"
  name="CONSULTATION"
  default="1"
  billable="1"
  transitionofcare="1"
  hide="no"
  istelemedicine="0"
  isols="0"

```

```

isgroupappt="0"
usecarriermaxtime="0"
requirereferral="0"
requireauthorization="0"
intakeformcount="0"
consentformcount="0"
includedemographicsform="0"
>
<appttypesettings
  id="ats5"
  profile=""
  hide="no"
  waitlistpriority="M"
  waitlistpriorityid="99"
  duration="30"
  color="PURPLE"
  cstemplate="cst100"
  instr=""
  olsdescriptivename=""
  patientmessagingtemplate="pat_mt71"
  recallmessagingtemplate=""
>
  <appttypedocument id="59" name="PF - PT
REGISTRATION" />
</appttypesettings>
<appttypesettings
  id="ats48"
  profile="prof10"
  hide="yes"
  waitlistpriority="M"
  waitlistpriorityid="99"
  duration="30"
  color="PURPLE"
  cstemplate="cst97"

```

```

        instr=""
        patientmessagingtemplate="pat_mt71"
        recallmessagingtemplate=""
    />
    <appttypesettings
        id="ats312"
        profile="prof8"
        hide="no"
        waitlistpriority="M"
        waitlistpriorityid="99"
        duration="30"
        color="PURPLE"
        ctemplate="cst97"
        instr=""
        patientmessagingtemplate="pat_mt71"
        recallmessagingtemplate=""
    >
        <appttypedocument id="59" name="PF - PT
REGISTRATION" />
    </appttypesettings>
    <appttypesettings
        id="ats1248"
        profile="prof18"
        hide="no"
        waitlistpriority="M"
        waitlistpriorityid="99"
        duration="30"
        color="PURPLE"
        ctemplate="cst102"
        instr=""
        olsdescriptivename=""
        patientmessagingtemplate=""
        recallmessagingtemplate=""
    />

```

```
        </appttype>
      </appttypelist>
    </Results>
    <Error />
  </PPMDResults>;
```

Get Visit ID by Reference ID

Action: getvisitidbyrefid

Sample XML:

```
<ppmdmsg
  action="getvisitidbyrefid"
  msgtime="12/31/2015 4:55:49 AM"
  class="api">
  <visitlist>
    <visit referenceid="refid1" />
    <visit referenceid="refid2" />
    <visit referenceid="refid3" />
  </visitlist>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getvisitidbyrefid",
    "@msgtime": "12/31/2015 4:55:49 AM",
    "@class": "api",
    "visitlist": {
      "visit": {
        "@referenceid": "refid1"
      },
      "visit": {
        "@referenceid": "refid2"
      }
    }
  }
}
```

Input Validation

- At least 1 visit node under visitlist must be present. Each visit node must have a non-empty referenceid attribute.

Attributes

- referenceid: Reference ID of the visit (required)

Results

This request returns a visitlist of corresponding visit unique IDs to the requested visit Reference IDs. If no matching visit with the requested Reference ID is found the corresponding id attribute will be skipped from the response.

Sample XML Result:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="5CD3471ZQ7" lst="3/25/2025 1:43:10 PM">
  <Results success="1">
    <visitlist>
      <visit referenceid="refid1" id="1" />
      <visit referenceid="refid2" id="2" />
      <visit referenceid="refid3" id="3" />
    </visitlist>
  </Results>
  <Error />
</PPMDResults>
```

Sample XML Result (no matching visit):

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="5CD3471ZQ7" lst="3/26/2025 11:47:06 AM">
  <Results success="1">
    <visitlist>
      <visit referenceid="111" />
    </visitlist>
  </Results>
<Error />
</PPMDResults>

```

Sample JSON Result:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "5CD3471ZQ7",
    "@lst": "3/25/2025 1:50:15 PM",
    "Results": {
      "@success": "1",
      "visitlist": {
        "visit": [
          {
            "@referenceid": "refid1",
            "@id": "1"
          },
          {
            "@referenceid": "refid2",
            "@id": "2"
          }
        ]
      }
    }
  }
}

```

```
        ]
      }
    },
    "Error": null
  }
}
```

Get Visits By ID

Action: getvisitsbyid

Requirements: At least one visit id must be present in the payload within the visitlist object.

Sample XML:

```
<ppmdmsg action="getvisitsbyid" class="api">
  <visitlist>
    <visit id="123"/>
  </visitlist>
  ...
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getvisitsbyid",
    "@class": "api",
    "visitlist": {
      "visit": [{
        "@id": "123"
      }]
    }
  }
}
```

Sample error response when there is no visit ID:

```

<PPMResults>
  <Results>
    <success>0</success>
  </Results>
  <Error>
    <Fault>
      <faultcode>Client</faultcode>
      <faultstring>Client Error</faultstring>
      <detail>
        <code>400</code>
        <description>The request body does not meet
the requirements of this request</description>
        <extrainfo>Ensure that the 'visitlist' element
contains at least one 'visit' element with an 'id'
attribute</extrainfo>
      </detail>
    </Fault>
  </Error>
</PPMResults>

```

Sample XML:

```

<ppmdmsg action="getvisitsbyid"
  class="api"
  msgtime="04/28/2025 10:20:42 AM"
  datechanged="04/28/2025 8:25:28 AM">
  <visitlist>
    <visit id="2432904"/>
    <visit id="2432905"/>
  </visitlist>
  <visit date="VisitDate"
    duration="Duration"
    color="Color" />

```

```

    <patient name="Name"
      ssn="SSN"
      changedat="ChangedAt"
      createdat="CreatedAt" />
    <insurance carname="CarName"
      carcode="CarCode"
      carcity="CarCity"
      changedat="ChangedAt"
      createdat="CreatedAt"/>
  </ppmdmsg>

```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "getvisitsbyid",
    "@class": "api",
    "@msgtime": "04/28/2025 04:55:23 AM",
    "@datechanged": "04/28/2025 04:55:23 AM",
    "@nocookie": "1",
    "usercontext": {
      "#text": "{{TOKEN}}"
    },
    "visitlist": {
      "visit": [
        {
          "@id": "2432904"
        },
        {
          "@id": "2432905"
        }
      ]
    }
  }
}

```

```

    },
    "visit": {
        "@date": "VisitDate",
        "@duration": "Duration",
        "@color": "Color"
    },
    "patient": {
        "@name": "Name",
        "@ssn": true,
        "@changedat": "ChangedAt",
        "@createdat": "CreatedAt"
    },
    "insurance": {
        "@carname": "CarName",
        "@carcode": "CarCode",
        "@carcity": "CarCity",
        "@changedat": "ChangedAt",
        "@createdat": "CreatedAt"
    }
}
}

```

Results

Sample JSON Results:

```

{
    "?xml": {
        "@version": "1.0",
        "@encoding": "ISO-8859-1"
    }
}

```

```

    },
    "PPMDResults": {
      "@s": "advancedmd-api-processrequest-0-5894d5d6cc-
jvdc9",
      "@lst": "04/28/2025 04:57:33",
      "Results": {
        "@servertime": "2025-04-28T04:57:33.540",
        "@visitcount": "2",
        "visitlist": {
          "visit": [
            {
              "@id": "2432904",
              "@date": "02/19/2021",
              "@duration": "15",
              "@color": "YELLOW",
              "@updatestatus": "C",
              "@istelemedicine": "0",
              "patientlist": {
                "patient": {
                  "@id": "429511",
                  "@name": "SPANISH,PATIENT",
                  "@createdat": "2021-02-
18T11:04:27.790",
                  "@changedat": "2024-09-
26T12:38:34.907",
                  "insurancelist": null
                }
              }
            }
          ],
          },
          {
            "@id": "2432905",
            "@date": "02/19/2021",
            "@duration": "20",
            "@color": "BRICK",
            "@updatestatus": "C",

```

```

        "@istelemedicine": "1",
        "patientlist": {
            "patient": {
                "@id": "429510",
                "@name": "NHTEST,PORTAL",
                "@createdat": "2021-02-
18T10:59:51.037",
                "@changedat": "2024-11-
07T20:35:30.877",
                "insurancelist": null
            }
        }
    ]
}
}
}
}
}

```

Sample XML Results:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-0-5894d5d6cc-
9q72x" lst="04/28/2025 04:59:39">
    <Results servertime="2025-04-28T04:59:39.937"
    visitcount="2">
        <visitlist>
            <visit id="2432904" date="02/19/2021"
            duration="15" color="YELLOW" updatestatus="C"
            istelemedicine="0">
                <patientlist>
                    <patient id="429511"
                    name="SPANISH,PATIENT" ssn="485629478" createdat="2021-02-
                    18T11:04:27.790" changedat="2024-09-26T12:38:34.907">
                        <insurancelist />
                    
```

```
        </patient>
      </patientlist>
    </visit>
    <visit id="2432905" date="02/19/2021"
duration="20" color="BRICK" updatestatus="C"
istelemedicine="1">
      <patientlist>
        <patient id="429510" name="NHTEST,PORTAL"
ssn="485762946" createdat="2021-02-18T10:59:51.037"
changedat="2024-11-07T20:35:30.877">
          <insurancelist />
        </patient>
      </patientlist>
    </visit>
  </visitlist>
</Results>
</PPMDResults>
```

Provider Actions

Add New Referring Provider

Action: addrefprovider

Sample XML:

```
<ppmdmsg
  action="addrefprovider"
  class="api"
  msgtime="5/14/2021 2:59:16 PM"
  id="281"
  type="0"
>
<masterfile
  uid="281"
  address1="6TH FLOOR"
  address2="4132 NORTH COLLEGE AVENUE"
  zipcode="67399"
  city="HONOLULU"
  state="HI"
  officephone="5785812355"
  fax="999"
  countrycode="USA"
  email=""
  areacode="578"
  practicename=""
  speciality=""
  taxonomy=""
  npinumber="1234565764"
  includeonhcfa="1"
  receiveautofax="1"
  licensenumber=""
  title="MD"
  lastname="ANDREJUK"
  middlename=""
```

```
        firstname="JULIA"
        code="A"
        overwrite="0"
        other="(578) 985-9809"
        phonetype="C"
        isinactive="0"
        changedat="1/6/2021 4:33:29 AM"
    />
</ppmdmsg>;
```

Sample JSON:

```
{
  "ppmdmsg" : {
    "@action": "addrefprovider",
    "@class": "api",
    "@msgtime": "5/14/2021 2:59:16 PM",
    "@id": "281",
    "@type": "0",
    "masterfile": {
      "@uid": "281",
      "@address1": "6TH FLOOR",
      "@address2": "4132 NORTH COLLEGE AVENUE",
      "@zipcode": "67399",
      "@city": "HONOLULU",
      "@state": "HI",
      "@officephone": "5785812355",
      "@fax": "999",
      "@countrycode": "USA",
      "@email": "",
      "@areacode": "578",
      "@practicename": ""
    }
  }
}
```

```

        "@speciality": "",
        "@taxonomy": "",
        "@npinumber": "1234565764",
        "@includeonhcfa": "1",
        "@receiveautofax": "1",
        "@licensenumbr": "",
        "@title": "MD",
        "@lastname": "ANDREJUK",
        "@middlename": "",
        "@firstname": "JULIA",
        "@code": "A",
        "@overwrite": "0",
        "@other": "(578) 985-9809",
        "@phonetype": "C",
        "@isinactive": "0",
        "@changedat": "1/6/2021 4:33:29 AM"
    }
}
}

```

Sample XML:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFEYP3NE" newid="6262" />

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  }
}

```

```
    },  
    "PPMDResults": {  
      "@s": "PRDAPI1WFEAYQLM",  
      "@newid": "6263"  
    }  
  }  
}
```

Update Referring Provider

Action: updaterefprovider

This action is used to update an existing referring provider, including soft-delete.

Sample Request:

The request body should contain a **masterfile** node with the provider's data.

```
<ppmdmsg action="updaterefprovider" class="masterfiles"
id="644" type="0">
  <masterfile uid="644" code="CAR00" address1="" address2=""
zipcode="" city="" state="" officephone="" fax=""
countrycode="" email="" areacode="" practicename=""
speciality="" taxonomy="" npinumber="" includeonhcfa="0"
receiveautofax="1" licensenumber="" title="" lastname="CARSON"
middlename="" firstname="DAVE" overwrite="0" other=""
phonetype="C" isinactive="0" changedat="07/18/2025 03:21:40"/>
</ppmdmsg>
```

Important Note: By default, any value not included in the request payload will be nullified. If **preservevalues="1"** on the masterfile node, only values provided will be updated, and values not provided will remain unchanged.

Optional ppmdmsg attributes:

- **id** – the identifier of the provider to return in the response (can be different from the ref provider that is being updated). If not specified, the list of all ref provider records will be returned. If set to **-1**, the response will not contain ref provider information.
- **type** – the lookup type, indicates how much data to include in the response. If missing or set to **0**, the response will contain the extended provider

information. Otherwise, the data will be limited to **uid**, **code**, **name**, **changedat**, and **display**.

Example Request:

```
<ppmdmsg action="updaterefprovider" class="masterfiles" id="-1">
  <masterfile uid="644" code="CAR00" npinumber="1234567890"
  preservevalues="1"/>
</ppmdmsg>
```

Example Response:

```
<PPMDResults s="advancedmd-api-processrequest-0-857dbcfbf5-1q898"
lst="07/21/2025 02:39:09" newid="644" />
```

Example Request:

```
<ppmdmsg action="updaterefprovider" class="masterfiles"
id="644" type="0">
  <masterfile uid="644" code="CAR00" npinumber="1234567890"
  preservevalues="1"/>
</ppmdmsg>
```

Example Response:

```
<PPMDResults s="advancedmd-api-processrequest-0-857dbcfbf5-1q898"
lst="07/21/2025 02:43:19" newid="644">
  <record licensekey="253018" uid="644" code="CAR00" name="CARSON, DAVE"
  lastname="CARSON" middlename="" firstname="DAVE" userfilefid="18466"
  financialsummaryfid="219093732" accountsreceivablefid="1613038651" display="1"
  address1="" address2="" zipcode="" city="" state="" areacode="" countrycode=""
  contactname="" officephone="" officeextension="" fax="" cell="" pager="" homephone=""
  other="" phonetype="C" email="" changedat="07/21/2025 02:43:20" title=""
  officeextension1="" homephone1="" practicename="" speciality="" taxonomy="" npinumber=""
  licensenumber="" includeonhcfa="0" ar_current="0.00" ar_30_days="0.00" ar_60_days="0.00"
  ar_90_days="0.00" ar_morethan120days="0.00" unappliedmoney="0.00" totalbalance="0.00"
  mtd_charges="0.00" mtd_payments="0.00" mtd_writeoffs="0.00" ytd_payments="0.00" ytd_
  charges="0.00" ytd_writeoffs="0.00" mtd_patients="" ytd_patients="" isinactive="0"
```

```

receiveautofax="1" />
</PPMDResults>

```

Fields for the masterfile Node

		Description	Type	Default value	Notes
1	uid	Referring Provider ID	int not null		
2	code	Unique Referring Provider code	char(6) not null		Required, unless you need to delete the ref provider.
3	speciality	Specialty	varchar (50) not null	NULL	
4	npinumber	NPI number	varchar (15) not null	NULL	
5	licensenum ber	License number	char (14) not null	NULL	
6	practicenam e	Practice name	varchar (100) not null	NULL	
7	taxonomy	Taxonomy	varchar (20)	NULL	

			not null		
8	title	Provider's title (e.g. MD)	varchar (10) not null	NULL	
9	firstname	First name	varchar (35) not null	NULL	
10	middlename	Middle name	varchar (35) not null	NULL	
11	lastname	Last name	varchar (35) not null	NULL	
12	address1	Apt / Ste #	varchar (30) not null	NULL	
13	address2	Address	varchar (30) not null	NULL	
14	countrycode	Country code	varchar (3) not null	NULL	
15	zipcode	Zip code	char (10) not null	NULL	
16	city	City	varchar (30)	NULL	

			not null		
17	state	State	varchar (3) not null	NULL	
18	areacode	Area code	char(3) not null	NULL	
19	officephone	Office phone number	char (25) not null	NULL	
20	other	Other phone number	char (25) not null	NULL	
21	phonetype	Other phone type	char(1) not null	NULL	No value range validation. Allowed values: C - Cell, P - Pager, H - Home, O - Other
22	fax	Fax number	char (25) not null	NULL	Please provide a valid fax number for the provider to receive Auto-Faxes.
23	email	Email	varchar (50) not null	NULL	

24	isinactive	Indicates whether the provider is inactive	bit not null	0	
25	changedat	Date and time when the request was modified.	dateti me not null	Current datetim e.	If another user has changed the record after this timestamp, an error will be thrown. This is used to ensure consistency if multiple requests try to modify the record simultaneously.
26	includeonh cfa	Allow to include a provider as the ordering/supervising provider on paper claims	bit not null	NULL	
27	preserveval ues	Indicates whether to nullify the values that were not supplied in the request payload	bit not null	0	
28	receiveauto fax	Allow the referring provider to receive an auto-fax	bit not null	1	

29	overwrite	If set to 0, enforces additional validation on the provider's data. The error occurs when another provider with the same NPI or name is found	bit not null	0	
----	-----------	-----------------------------------------------------------------------------------------------------------------------------------------------	-----------------	---	--

Delete and Restore Ref Provider

The ref provider visibility can be changed if the provider code is not specified in the request payload. In this case, you have to specify the display parameter.

Request and Response

The request body should contain a **masterfile** node with the provider's data without code attribute. The display indicates whether to delete - **0** or undelete - **1** the referring provider:

```
<ppmdmsg action="updaterefprovider" class="masterfiles"
id="644">
  <masterfile uid="644" display="0"/>
</ppmdmsg>
```

Errors

	Use case	Response
--	----------	----------

1	Update the ref provider that was changed after the specified change date.	<pre> <PPMDResults s="advancedmd-api-processrequest-0-857dbcfbf5-1q898" lst="07/22/2025 00:06:33"> <Results /> <Error> <Fault> <faultcode>Client</faultcode> <faultstring>Client Error</faultstring> <detail> <code>-2147217398</code> <description>Another user has changed this record.</description> ... </detail> </Fault> </Error> </PPMDResults> </pre>
2	Delete ref provider that is linked to a patient's referral (as Referred By). Note: the error wording	<pre> <PPMDResults s="advancedmd-api-processrequest-0-857dbcfbf5-1q898" lst="07/22/2025 01:05:56"> <Results /> <Error> <Fault> <faultcode>Client</faultcode> <faultstring>Client Error</faultstring> <detail> <code>-2147217389</code> <description>This insert cannot be completed because of conflicts in other office keys.</description> ... </detail> </Fault> </Error> </PPMDResults> </pre>

	does not describe the actual root cause.	
3	<p>Change the provider's Name or NPI to the one that is already assigned to a different provider in the system.</p> <p>Note: occur only if overwrite =0.</p>	<pre> <PPMDResults s="advancedmd-api-processrequest-0-598c86d9f4-bdgp4" lst="07/30/2025 10:50:57"> <Results /> <Error> <Fault> <faultcode>Client</faultcode> <faultstring>Client Error</faultstring> <detail> <code>-2147217297</code> <description>Overwritable duplicate found..</description> ... </detail> </Fault> </Error> </PPMDResults> </pre>

4	<p>Change the provider's code to the one that is already assigned to a different, not-deleted provider in the system.</p>	<pre> <PPMDResults s="5CD116MK1W" lst="8/22/2025 9:43:27 AM"> <Results /> <Error> <Fault> <faultcode>Client</faultcode> <faultstring>Client Error</faultstring> <detail> <code>-2147217406</code> <description>Duplicate code: Item cannot be added.</description> ... </detail> </Fault> </Error> </PPMDResults> </pre>
5	<p>Change the provider's code to the one that is already assigned</p>	<pre> <PPMDResults s="advancedmd-api-processrequest-0-598c86d9f4-bdgp4" lst="07/30/2025 10:50:57"> <Results /> <Error> <Fault> <faultcode>Client</faultcode> <faultstring>Client Error</faultstring> <detail> <code>-2147217392</code> <description>Deleted duplicate found..</description> ... </detail> </Fault> </Error> </PPMDResults> </pre>

to a different, deleted provider in the system.	<pre> </detail> </Fault> </Error> </PPMDResults> </pre>
-------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------

Other Errors

Note: Any other errors (e.g., database check failed) will be returned with the code -2147221504. Example:

```

<PPMDResults s="advancedmd-api-processrequest-0-598c86d9f4-
7spd" lst="07/30/2025 10:59:26">
    <Error>
        <Fault>
            <faultcode>Server</faultcode>
            <faultstring>Server Error</faultstring>
            <detail>
                <code>-2147221504</code>
                <description>Cannot insert the value NULL into
column 'LastName', table 'GROUP_VERSION_253.dbo.mf_
ReferringProviders'; column does not allow nulls. UPDATE
fails.
The statement has been terminated.</description>
                ...
            </detail>
        </Fault>
    </Error>
</PPMDResults>

```

Save Referring Providers

JSON Example

```
{
  "ppmdmsg": {
    "@action": "saverefprovider",
    "@class": "masterfiles",
    "@msgtime": "2/10/2023 3:42:33 PM",
    "@id": "new",
    "@type": "0",
    "masterfile": {
      "@uid": "",
      "@address1": "RANDOM ADDRESS 1",
      "@address2": "RANDOM ADDRESS 2",
      "@zipcode": "98034",
      "@city": "JUANITA",
      "@state": "WA",
      "@officephone": "33412311222",
      "@fax": "",
      "@countrycode": "USA",
      "@email": "",
      "@areacode": "425",
      "@practicename": "",
      "@speciality": "",
      "@taxonomy": "",
      "@npinumber": "111111111",
      "@includeonhcfa": "1",
      "@receiveautofax": "0",
      "@licensenum": "111111111",
      "@title": "",
      "@lastname": "TEST",
      "@middlename": "",
      "@firstname": "PROVIDER",
      "@code": "TEST",
    }
  }
}
```

```

        "@overwrite": "0",
        "@other": "",
        "@phonetype": "C",
        "@isinactive": "0"
    }
}
}

```

XML Example

```

<ppmdmsg
  action="saverefprovider"
  class="masterfiles"
  msgtime="2/10/2023 3:42:33 PM"
  id="new"
  type="0"
>
  <masterfile
    uid=""
    address1="asd"
    address2="asdasd"
    zipcode="98034"
    city="JUANITA"
    state="WA"
    officephone="33412311222"
    fax=""
    countrycode="USA"
    email=""
    areacode="425"
    practicename=""
    speciality=""
    taxonomy=""
  </masterfile>
</ppmdmsg>

```

```
npinumber="1111111111"  
includeonhcfa="1"  
receiveautofax="0"  
licensenumbr="1111111111"  
title=""  
lastname="TEST"  
middlename=""  
firstname="PROVIDER"  
code="TEST"  
overwrite="0"  
other=""  
phonetype="C"  
isinactive="0"  
/>  
</ppmdmsg>;
```

Get New and Modified Providers

Action: getupdatedproviders

Sample XML:

```
<ppmdmsg action="getupdatedproviders" class="api"
msgtime="7/24/2005 10:20:42 AM" datechanged="2005-03-01">
  <provider name="Name" changedat="ChangedAt"
createdat="CreatedAt"/>
  <profile profilecode="ProfileCode"
description="Description" changedat="ChangedAt"
createdat="CreatedAt"/>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getupdatedproviders",
    "@class": "api",
    "@msgtime": "7/24/2015 10:20:42 AM",
    "@datechanged": "2005-03-01",
    "provider": {
      "@name": "Name",
      "@changedat": "ChangedAt",
      "@createdat": "CreatedAt"
    },
    "profile": {
      "@profilecode": "ProfileCode",
      "@description": "Description",
      "@changedat": "ChangedAt",
      "@createdat": "CreatedAt"
    }
  }
}
```

Results:

This request returns a <providerlist> element or object that contains a list of all providers that have been modified or added since the specified date. ("Modified" providers include those whose responsible party information has changed as well. Additionally, if the <profile> element is included, then the profile information for each provider will be returned.)

Every returned element will contain an ID attribute. The <provider> elements will also include an "updatestatus" attribute that indicates why the provider was returned:

- N: The provider was added since the specified date
- C: The provider or the provider's responsible party information has been modified (If the <insurance> or <referralplan> element is included, then this could also indicate that the provider's insurance coverage and/or referral plan has changed)
- D: The provider existed prior to the specified date, but has since been deleted

In addition to the above standard attributes, each element can also contain any of a large number of optional attributes, which must be identified by the calling application. For example, in the sample request above, the calling application has specified that the provider elements should include the provider's full name ("Name"), and the attribute should be "name". A list of available fields can be determined by calling the getupdatedproviderstemplate action, described below.

Sample XML:

```
<PPMDResults s="WF1">
  <Results servertime="2006-05-24T16:20:00.997"
    providercount="2">
    <providerlist>
      <provider id="76" name="TEST PROVIDER,"
        changedat="2006-05-23T13:04:05.757" createdat="2006-05-
        23T13:04:05.757" updatestatus="N">
        <profilelist>
```

```

        <profile id="106" profilecode="TEST"
description="TEST" changedat="2006-05-23T13:04:05.960"
createdat="2006-05-23T13:04:05.960" />
    </profilelist>
</provider>
</providerlist>
</Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "@s": "WF1",
    "Results": {
      "@servertime": "2006-05-24T16:20:00.997",
      "@providercount": "2",
      "providerlist": {
        "provider": {
          "@id": "76",
          "@name": "TEST PROVIDER,",
          "@changedat": "2006-05-23T13:04:05.757",
          "@createdat": "2006-05-23T13:04:05.757",
          "@updatestatus": "N",
          "profilelist": {
            "profile": {
              "@id": "106",
              "@profilecode": "TEST",
              "@description": "TEST",
              "@changedat": "2006-05-23T13:04:05.960",
              "@createdat": "2006-05-23T13:04:05.960"
            }
          }
        }
      }
    }
  }
}

```

```
}  
}  
}  
}
```

Note: *If a provider has been added since the specified date and then deleted, that provider will not be returned in the results. Deleted providers will only be returned if they existed in the database prior to the specified date.*

Important Note: *For repeated getupdatedprovider calls, please make sure you understand the importance of servertime in the response from AdvancedMD and datachanged attribute in the request you send. When a response comes back from AdvancedMD, store the servertime value and use this value in the datechanged attribute when the next call is made to update providers. Do not adjust the servertime value to match time zones.*

Get New and Modified Referring Providers

Action: getupdatedreferringproviders

Sample XML:

```
<ppmdmsg action="getupdatedreferringproviders" class="api"
datechanged="2014-11-10" msgtime="11/21/2014 8:45:20 AM" />
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getupdatedreferringproviders",
    "@class": "api",
    "@msgtime": "7/24/2015 10:20:42 AM",
    "@datechanged": "7/24/2015 10:20:42 AM",
  }
}
```

Results:

This request returns a <refproviderlist> element that contains a list of all referring providers that have been modified or added since the specified date. Every returned element will contain id, code, name, and specialty attributes. The following example is a sample of the returned data.

Sample XML:

```
<PPMDResults><Results>
  <refproviderlist>
    <refprovider id="1022" code="CPMAKS" name="SMITH, JOHN"
specialty="ALLERGY" />
```

```
</refproviderlist>
</Results></PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "Results": {
      "refprovider": {
        "@id": "[auto]",
        "@code": "Code",
        "@name": "Name",
        "@specialty": "Specialty",
      }
    }
  }
}
```

Note: *If no date is specified in the request, then all referring providers will be returned.*

Get a List of Fields Available to "getupdatedproviders"

Action: getupdatedproviderstemplate

Sample XML:

```
<ppmdmsg action="getupdatedproviderstemplate" class="api"
msgtime="7/24/2015 10:33:06 AM">
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getupdatedproviderstemplate",
    "@class": "api",
    "@msgtime": "7/24/2015 10:20:42 AM",
  }
}
```

Results:

This request returns a template that "getupdatedproviders" requests can be based on. It includes every optional field that is available for the <provider> and <profile> elements. The following sample document is a very small subset of the fields actually returned.

Sample XML:

```
<PPMDResults>
  <Results>
    <provider id="[auto]" updatestatus="[auto]"
name="Name" lastname="LastName" firstname="FirstName"
middlename="MiddleName" .../>
```

```
        <profile id="[auto]" status="Status"
profilecode="ProfileCode" license="License"
federalid="FederalID" clianumber="CLIANumber" .../>
    </Results>
    <Error/>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "Results": {
      "provider": {
        "@id": "[auto]",
        "@updatestatus": "[auto]",
        "@name": "Name",
        "@lastname": "LastName",
        "@firstname": "FirstName",
        "@middlename": "MiddleName"
      },
      "profile": {
        "@id": "[auto]",
        "@status": "Status",
        "@profilecode": "ProfileCode",
        "@license": "License",
        "@federalid": "FederalID",
        "@clianumber": "CLIANumber"
      }
    },
    "Error": null
  }
}
```

Note: Attributes can be named any valid attribute name. For example, if you are interested in the LastName field, you can call the attribute name, last_name, etc. When you make the "getupdatedpproviders" request, you indicate your attribute name as follows: attributename="FieldName", e.g. lastname="LastName" or last_name="LastName".

Get Clinician Profile Picture

Get Clinician Profile (GET /masterfile/olsprofiles/ {id})

Basic Construction

```
{{webserverurl}}/api/api-101/  
{{Appname}}/masterfiles/olsprofiles/{{id}}
```

Production Request

```
https://providerapi-dev.advancedmd.com/api/api-  
101/TEMP/masterfile/olsprofiles/{id}
```

Test Request

```
https://providerapi-beta.advancedmd.com/api/api-  
101/TEMP/masterfile/olsprofiles/{id}
```

Request Parameters

Id (integer)– The id of the profile (required path parameter).

Response Codes

- 200 – Success. Returns the updated account.
- 400 – The input is null or invalid.

- 403 – The authenticated user does not have permission to access this resource.
- 404 – The requested account was not found.
- 409 – An account already exists with the same name.
- 500 – Internal Server Error.

Example Success Response Payload

```
{
  "shoulddeleteimage": null,
  "olsprofileimage": null,
  "id": 17,
  "preferredname": null,
  "speciality": null,
  "preferredphone": null,
  "description": null,
  "hasimage": false,
  "bases3bucketurl": "https://amds-prd-olsv2.s3-us-west-2.amazonaws.com/",
  "createdby": "PPMD_JKOJIMA"
}
```

Example Error Response Payload

```
{
  "exceptionMessage": "Object reference not set to an instance of an object.",
  "exceptionType": "System.NullReferenceException",
  "identifier": "0HM9CRJS9PB7G:00000001",
  "title": "Server Error",
}
```

```
    "detail": "An unhandled exception occurred while  
processing the request.",  
  }
```

Get Clinician Profile Picture (GET /processed/providers/{officekey}/{id}.jpg)

Basic Construction

```
https://amds-prd-olsv2.s3-us-west-  
2.amazonaws.com/processed/providers/{officekey}/{id}.jpg
```

Request Parameters

- **Id** (integer) – The id of the profile (required path parameter).
- **Api_key** (integer) – (required path parameter).

Response Codes

- 200 – Success. Returns the updated account.
- 400 – The input is null or invalid.
- 403 – The authenticated user does not have permission to access this resource.
- 404 – The requested account was not found.

- 409 – An account already exists with the same name.
- 500 – Internal Server Error.

Example Success Response Payload

Returns the profile picture.

Example Error Response Payload

```
<?xml version="1.0" encoding="UTF-8"?>
<Error>
  <Code>AccessDenied</Code>
  <Message>Access Denied</Message>
  <RequestId>GT9HG7WHSERHNYHJ</RequestId>
  <HostId>2ZBDgAuZJCPHPUD5iBgj9v7tbJ2ryyvKR9A5ZbsSf0sIN098v
hDEgiIJIK5sQUVgBf3eerxAmA=</HostId>
</Error>
```

Get Clinician Profile Picture – Combines both requests (GET /api/masterfile/providers/profiles/{id}/saprofile)

Basic Construction

```
https://pm-wfe-212-
dev.advancedmd.com/api/masterfile/providers/profiles/
{id}/saprofile
```

Request Parameters

Id (integer) – The id of the profile (required path parameter).

Response Codes

- 200 – Success. Returns the updated account.
- 400 – The input is null or invalid.
- 403 – The authenticated user does not have permission to access this resource.
- 404 – The requested account was not found.
- 409 – An account already exists with the same name.
- 500 – Internal Server Error.

Example Success Response Payload

```
{
  "id": 10,
  "name": "Paul",
  "specialty": "Social Worker",
  "phone": "(555) 345-4556",
  "description": "Profile Bio of Paul Anderson",
  "imagesource": "https://amds-portal-ols-profile-dev.s3-us-west-2.amazonaws.com/processed/profiles/212017/2992.jpg",
  "certifications": [
    {
      "id": 4,
```

```

        "name": "Neurology (Psychiatry and Neurology)"
    }
],
"credentials": [],
"educations": [
    {
        "id": 4,
        "name": "San-Frankivsko University"
    },
    {
        "id": 6,
        "name": "Ternopolice Academy"
    }
],
"gender": {
    "id": 5,
    "name": "Male"
},
"languages": [
    {
        "id": 10,
        "name": "Assamese"
    },
    {
        "id": 111,
        "name": "Nauru"
    }
]
}

```

Patient Actions

Get New and Modified Patients

Action: getupdatedpatients

Sample XML:

```
<ppmdmsg action="getupdatedpatients" class="api"
msgtime="7/24/2015 10:20:42 AM" datechanged="2005-03-
24T8:25:28.730">
  <patient name="Name" ssn="SSN" changedat="ChangedAt"
createdat="CreatedAt" />
  <insurance carname="CarName" carcode="CarCode"
carcity="CarCity" changedat="ChangedAt"
createdat="CreatedAt"/>
  <referralplan referraltype="ReferralType" reason="Reason"
byreferringproviderfid="ByReferringProviderFID"/>
  <filterlist>
    <filter table="patient" fieldset="dob" >
  </filterlist>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getupdatedpatients",
    "@class": "api",
    "@msgtime": "7/24/2015 10:20:42 AM",
    "@datechanged": "2005-03-24T8:25:28.730",
    "patient": {
      "@name": "Name",
      "@ssn": "SSN",
      "@changedat": "ChangedAt",
      "@createdat": "CreatedAt"
    },
    "insurance": {
      "@carname": "CarName",
```

```

        "@carcode": "CarCode",
        "@carcity": "CarCity",
        "@changedat": "ChangedAt",
        "@createdat": "CreatedAt"
    },
    "referralplan": {
        "@referraltype": "ReferralType",
        "@reason": "Reason",
        "@byreferringproviderfid": "ByReferringProviderFID"
    },
    "filterlist": {
        "filter": {
            "@table": "patient",
            "@fieldset": "dob"
        }
    }
}

```

Results:

This request returns a <patientlist> element or object that contains a list of all patients that have been modified or added since the specified date. ("Modified" patients include those whose responsible party information has changed as well. Additionally, if the <insurance> element is included, then patients whose insurance information has changed will be returned. If the <referralplan> element is included, then patients whose referral plan information has changed will be returned. Likewise, if the <episode> element is included, then patients whose episodes have changed will be returned. Also, if the <customdata> element is included, a customdatachanged attribute will exist notifying you if any customdata has changed for patients included in the results.)

If the <insurance> element is included then each <patient> element will contain an <insurancelist> element that contains a list of the patient's insurance coverages. All insurance coverages will be included, even those that have not

changed. Similarly if the <referralplan> element is included then each <patient> element will contain a <referralplanlist> element that contains all of the patient's referral plans. Likewise, if the <episode> element is included then each <patient> element will contain an <episodelist> element that contains all of the patient's episodes.

Every returned element (<patient>, <insurance>, <referralplan> and <episode>) will contain an ID attribute. The <patient> elements will also include an "updatestatus" attribute that indicates why the patient was returned:

- N: The patient was added since the specified date
- C: The patient or the patient's responsible party information has been modified (If the <insurance> or <referralplan> element is included, then this could also indicate that the patient's insurance coverage and/or referral plan has changed)
- D: The patient existed prior to the specified date, but has since been deleted

In addition to the above standard attributes, each element can also contain any of a large number of optional attributes, which must be identified by the calling application. For example, in the sample request above, the calling application has specified that the patient elements should include the patient's full name ("Name"), and the attribute should be "name". A list of available fields can be determined by calling the getupdatedpatientstemplate action, described below.

Sample XML:

```
<PPMDResults>
  <Results servertime="2005-03-25T8:25:35.730"
    patientcount="14">
    <patientlist>
      <patient id="198511" name="CARD,ANDY" ssn=""
        changedat="2005-03-24T12:54:12.493" createdat="2015-04-
        23T09:26:45.953" updatestatus="C">
        <insurancelist>
          <insurance id="7126" seqnum="1"
            carname="BAKERY AND CONFICTIONARY" carcode="BAKE1"
            carcicy="KENNSINGTON" changedat="2015-07-09T15:21:17.633"
```

```

createdat="2015-05-01T09:44:49.440" />
    </insurancelist>
    <referralplanlist>
        <referralplan id="2345"
referraltype="I" reason="12" byreferringproviderfid="123" />
    </referralplanlist>
</patient>
</patientlist>
</Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "@servertime": "2005-03-25T8:25:35.730",
      "@patientcount": "14",
      "patientlist": {
        "patient": {
          "@id": "198511",
          "@name": "CARD,ANDY",
          "@ssn": "",
          "@changedat": "2005-03-24T12:54:12.493",
          "@createdat": "2015-04-23T09:26:45.953",
          "@updatestatus": "C",
          "insurancelist": {
            "insurance": {
              "@id": "7126",
              "@seqnum": "1",
              "@carname": "BAKERY AND CONFICTIONARY",
              "@carcode": "BAKE1",
              "@carcity": "KENNSINGTON",

```



```

<ppmdmsg action="getupdatedpatients" class="api"
msgtime="7/24/201510:20:42 AM" datechanged="2005-03-
24T8:25:28.730">
  <patientlist>
    <patient id='123'>
    <patient id='456'>
    <patient id='789'>
  </patientlist>
  <patient name="Name" ssn="SSN" changedat="ChangedAt"
createdat="CreatedAt" />
  <insurance carname="CarName" carcode="CarCode"
carcity="CarCity" changedat="ChangedAt"
createdat="CreatedAt"/>
  <referralplan referraltype="ReferralType" reason="Reason"
byreferringproviderfid="ByReferringProviderFID"/>
  <filterlist>
    <filter table="patient" fieldset="dob" >
  </filterlist>
</ppmdmsg>

```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "getupdatedpatients",
    "@class": "api",
    "@msgtime": "7/24/201510:20:42 AM",
    "@datechanged": "2005-03-24T8:25:28.730",
    "patientlist": {
      "patient": [
        {
          "@id": "123"
        },
        {
          "@id": "456"
        }
      ]
    }
  }
}

```

```

        },
        {
            "@id": "789"
        }
    ]
},
"patient": {
    "@name": "Name",
    "@ssn": "SSN",
    "@changedat": "ChangedAt",
    "@createdat": "CreatedAt"
},
"insurance": {
    "@carname": "CarName",
    "@carcode": "CarCode",
    "@carcity": "CarCity",
    "@changedat": "ChangedAt",
    "@createdat": "CreatedAt"
},
"referralplan": {
    "@referraltype": "ReferralType",
    "@reason": "Reason",
    "@byreferringproviderfid": "ByReferringProviderFID"
},
"filterlist": {
    "filter": {
        "@table": "patient",
        "@fieldset": "dob"
    }
}
}
}
}

```

A developer may also want to retrieve the results for a single patient at a time. A new "patientid" attribute exists on the root <ppmdmsg> element that will allow for this. Using this method may return a response more quickly, but is simply a different way to retrieve the demographics information for a selected patient. For example:

Sample XML:

```
<ppmdmsg action="getupdatedpatients" class="api"
msgtime="7/24/2015 10:20:42 AM" datechanged="2005-03-
24T8:25:28.730" patientid="1234">
  <patient name="Name" ssn="SSN" changedat="ChangedAt"
createdat="CreatedAt" />
  <insurance carname="CarName" carcode="CarCode"
carcity="CarCity" changedat="ChangedAt"
createdat="CreatedAt"/>
  <referralplan referraltype="ReferralType" reason="Reason"
byreferringproviderfid="ByReferringProviderFID"/>
  <filterlist>
    <filter table="patient" fieldset="dob" >
  </filterlist>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getupdatedpatients",
    "@class": "api",
    "@msgtime": "7/24/2015 10:20:42 AM",
    "@datechanged": "2005-03-24T8:25:28.730",
    "@patientid": "1234",
    "patient": {
      "@name": "Name",
      "@ssn": "SSN",
      "@changedat": "ChangedAt",
      "@createdat": "CreatedAt"
```

```

    },
    "insurance": {
      "@carname": "CarName",
      "@carcode": "CarCode",
      "@carcity": "CarCity",
      "@changedat": "ChangedAt",
      "@createdat": "CreatedAt"
    },
    "referralplan": {
      "@referraltype": "ReferralType",
      "@reason": "Reason",
      "@byreferringproviderfid": "ByReferringProviderFID"
    },
    "filterlist": {
      "filter": {
        "@table": "patient",
        "@fieldset": "dob"
      }
    }
  }
}

```

Notes:

- The `<insurance>`, `<referralplan>`, and `<filterlist>` elements or objects are optional. For example, if `<insurance>` element is not included, then patients whose insurance information has changed will not be returned.
- If a `<filterlist>` element is not specified, a default set of filters will be applied to the incoming request. If you want to see what values are available for the `<filterlist>` element see the [getfieldsets](#) API call.

- *If a patient has been added since the specified date and then deleted, that patient will not be returned in the results. Deleted patients will only be returned if they existed in the database prior to the specified date.*
- *Repeated getupdatedpatient calls: Please make sure you understand the importance of servertime in the response from AdvancedMD and datechanged attribute in the request you send. When a response comes back from AdvancedMD, store the servertime value and use this value in the datechanged attribute when the next call is made to update patients. Do not adjust the servertime value with the time zones.*
- *If you exceed 28 days between the datechanged and the current date you will receive additional patients that have a visit that occurs after the value passed in date changed.*

Get a List of Fields Available to "getupdatedpatients"

Action: getupdatedpatientstemplate

Sample XML:

```
<ppmdmsg action="getupdatedpatientstemplate" class="api"
msgtime="7/24/2015 10:33:06 AM">
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getupdatedpatientstemplate",
    "@class": "api",
    "@msgtime": "7/24/2015 10:33:06 AM"
  }
}
```

Results:

This request returns a template that "getupdatedpatients" requests can be based on. It includes every optional field that is available for the <patient> and <insurance> elements. The following sample document is a very small subset of the fields actually returned. The full list can be found [here](#).

Sample XML:

```
<PPMDResults>
  <Results>
    <patient id="[auto]" updatestatus="[auto]"
lastname="LastName" firstname="FirstName"
middlename="MiddleName" name="Name" chartnumber="ChartNumber"
.../>
```

```

        <insurance id="[auto]" active="Active"
sequenceNumber="SequenceNumber"
effectivestartdate="EffectiveStartDate"
effectiveenddate="EffectiveEndDate" carcode="CarCode"
carname="CarName" .../>
        <referralplan id="[auto]" referralplan_
uid="ReferralPlan_UID" referraltype="ReferralType" .../>
    </Results>
    <Error/>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "patient": {
        "@id": "[auto]",
        "@updatestatus": "[auto]",
        "@lastname": "LastName",
        "@firstname": "FirstName",
        "@middlename": "MiddleName",
        "@name": "Name",
        "@chartnumber": "ChartNumber"
      },
      "insurance": {
        "@id": "[auto]",
        "@active": "Active",
        "@sequencenumber": "SequenceNumber",
        "@effectivestartdate": "EffectiveStartDate",
        "@effectiveenddate": "EffectiveEndDate",
        "@carcode": "CarCode",
        "@carname": "CarName"
      },
      "referralplan": {

```

```
    "@id": "[auto]",
    "@referralplan_uid": "ReferralPlan_UID",
    "@referraltype": "ReferralType"
  }
},
"Error": null
}
```

Note: Attributes can be named any valid attribute name. For example, if you are interested in the LastName field, you can call the attribute name, last_name, etc. When you make the "getupdatedpatients" request, you indicate your attribute name as follows: attributename="FieldName", e.g. lastname="LastName" or last_name="LastName".

Get the List of Filters Available to "getupdatedpatients"

Action: getfieldsets

Sample XML:

```
<ppmdmsg action="getfieldsets" class="api" msgtime="5/22/2015 2:25:15 PM">
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getfieldsets",
    "@class": "api",
    "@msgtime": "5/22/2015 2:25:15 PM"
  }
}
```

Results:

This request returns a <tablelist> element that contains a number of <table> elements. The code attribute is the value that would be used for the table attribute in the <filter> element. The description attribute gives you some information about what the table filter is covering. The <table> element contains a <fieldsetlist> element that contains a number of <fieldset> elements. The code attribute is the value that would be used for the fieldset attribute in the <filter> element. The description attribute gives you the specific information about what the particular fieldset covers.

Sample XML:

```
<PPMDResults>
```

```

    <Results>
      <tablelist>
        <table code="Patient" description="Patient
Information">
          <fieldsetlist>
            <fieldset code="DOB" description="Patients
Date of Birth" />
          </fieldsetlist>
        </table>
      </tablelist>
    </Results>
  </PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "tablelist": {
        "table": {
          "@code": "Patient",
          "@description": "Patient Information",
          "fieldsetlist": {
            "fieldset": {
              "@code": "DOB",
              "@description": "Patients Date of Birth"
            }
          }
        }
      }
    }
  }
}

```

Add a Patient

Action: addpatient

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "addpatient",
    "@class": "api",
    "@msgtime": "4/1/2021 2:16:55 PM",
    "@nocookie": "0",
    "patientlist": {
      "patient": {
        "@respparty": "SELF",
        "@name": "ami,mon 7",
        "@sex": "M",
        "@relationship": "1",
        "@hipaarelationship": "18",
        "@dob": "12/04/1966",
        "@ssn": "",
        "@chart": "AUTO",
        "@profile": "3",
        "@finclass": "8",
        "@deceased": "",
        "@title": "MR",
        "@maritalstatus": "2",
        "@insorder": "",
        "@employer": "ibm, inc.",
        "@pcp": "475",
        "@additionalmrn": "SomeMrn",
        "address": {
          "@zip": "38834",
          "@city": "CORINTH",
          "@state": "MS",
```

```

        "@address1": "apt b-5",
        "@address2": "123 rice creek dr"
    },
    "contactinfo": {
        "@homephone": "(801)555-4252",
        "@officephone": "(605)555-2265",
        "@officeext": "123",
        "@otherphone": "(662) 555-3823",
        "@othertype": "C",
        "@email": "monami@email.com",
        "@preferredcommunicationfid": "3"
    }
}
},
"resppartylist": {
    "respparty": {
        "@name": "self",
        "@accttype": "4"
    }
}
}
}

```

Results:

This action returns a <patientlist> element that contains a full <patient> element, as retrieved from the database, including any data that is defaulted for the patient by the system (such as A/R buckets, etc.)

Sample XML:

```

<PPMDResults s="CB-PM12" lst="3/20/2018 1:52:06 PM" n="1">
  <Results success="1">

```

```
<patientlist>
  <patient
    id="pat307396"
    importid=""
    dob="03/11/1952"
    deceased=""
    inactive=""
    inactivestatus=""
    inactivetitle=""
    inactivedescription=""
    name="SMITH,BOB"
    respparty="resp319555"
    isinvoiceentity="0"
    profile="prof18"
    insorder=""
    sex="M"
    genderidentity=""
    genderidentityother=""
    orientation=""
    orientationother=""
    chart="2558"
    maritalstatus="1"
    employerid=""
    employer=""
    ssn=""
    finclasscode="XX"
    title="MR"
    relationship="1"
    hipaarelationship="18"
    languageid="44"
    ethnicityid=""
    language="English"
    ethnicity=""
    races=""
```

```
recalcbuckets="0"
additionalmrn=""
>
<address
  zip="15136"
  city="MC KEES ROCKS"
  state="PA"
  address1=""
  address2="123 MAIN STREET"
  areacode="412"
  countrycode=""
/>
<contactinfo
  name=""
  homephone=""
  officephone=""
  officeext=""
  otherphone=""
  othertype=""
  email=""
  emailverificationstatus="0"
  preferredcommunicationfid=""
  confidentialcommunicationfid=""
  communicationnote=""
/>
<arbucketlist>
  <arbucket
    buckettype="p"
    current="0.00"
    past30="0.00"
    past60="0.00"
    past90="0.00"
    past120="0.00"
    unapplied="0.00"
```

```

        total="0.00"
    />
    <arbucket
        buckettype="pi"
        current="0.00"
        past30="0.00"
        past60="0.00"
        past90="0.00"
        past120="0.00"
        unapplied="0.00"
        total="0.00"
    />
</arbucketlist>
<insplanlist />
<refplanlist>
    <refplan
        id="rplan311860"
        refprov="rprov505"
        type="I"
        refplanstatus="1"
        reason="SELF-REFERRAL "
        preauthreq="0"
        preauth=""
        refnum=""
        facility="fac1"
        proccode=""
        diagcodes=""
        begindate="03/17/2018"
        enddate=""
        maxvisits=""
        usedvisits=""
        maxamount=""
        usedamount=""
        status="status1"
    </refplan>
</refplanlist>

```

```

        sequence="1"
        notes=""
        ismain="1"
    />
</refplanlist>
<memolist>
    <memo
        id="memo254722"
        type="c"
        enddate="03/20/2019"
        changedat="03/20/2018 13:52:10"
        created="03/20/2018"
        createuser="PPMD_MLIGOUR"
        revoked="03/20/2018"
        revokedby=""
    >
        NEW PATIENT DEFAULT
    </memo>
</memolist>
<filelist />
<visitlist />
</patient>
</patientlist>
<resppartylist>
    <respparty
        id="resp319555"
        name="SMITH,BOB"
        accttype="ac_type4"
        acctnum="319555"
        dob="03/11/1952"
        sex="M"
        title="MR"
        employer=""
        employstatus="1"

```

```
ssn=""
sendstmt="1"
stmtrestart=""
holdreasonfid="0"
holdreasondesc=""
holdreasoncode=""
billcycle="28"
fincharge="1"
stmtformat=""
balancefwd="1"
lastpmtdate=""
lastpmtamount=""
laststmtdate=""
laststmtamount=""
lastbillingcaption=""
lastbillingtip=""
paymentplanbalance=""
>
<address
  zip="15136"
  city="MC KEES ROCKS"
  state="PA"
  address1=""
  address2="123 MAIN STREET"
  areacode="412"
  countrycode=""
/>
<contactinfo
  name=""
  homephone=""
  officephone=""
  officeext=""
  otherphone=""
  othertype=""
```

```

        email=""
        preferredcommunicationfid=""
        communicationnote=""
    />
<creditcardonfile />
<arbucketlist>
    <arbucket
        buckettype="r"
        current="0.00"
        past30="0.00"
        past60="0.00"
        past90="0.00"
        past120="0.00"
        unapplied="0.00"
        total="0.00"
    />
    <arbucket
        buckettype="ri"
        current="0.00"
        past30="0.00"
        past60="0.00"
        past90="0.00"
        past120="0.00"
        unapplied="0.00"
        total="0.00"
    />
</arbucketlist>
<familymemberlist>
    <familymember
        id="family307396"
        name="SMITH,BOB"
        chart="2558"
        isrp="1"
    >

```

```

        <contactinfo homephone="" />
        <address
            zip="15136"
            city="MC KEES ROCKS"
            state="PA"
            address1=""
            address2="123 MAIN STREET"
            countrycode=""
        />
    </familymember>
</familymemberlist>
</respparty>
</resppartylist>
<accttypelist>
    <accttype id="ac_type4" name="TYPICAL ACCOUNT" code="TA"
/>
</accttypelist>
<profilelist>
    <profile
        id="prof18"
        name="BABBIT, CASEY"
        fullname="BABBIT,CASEY"
        code="BABBIT"
        chargefeesched="feesch21092"
        fullinactive="No"
        status="ACTIVE"
    >
    <finclasslist>
        <finclass
            id="fclass1"
            name=""
            code=""
            billins="0"
            billlab="1"

```

```

        ca="0"
        responsible="0"
        acceptassign="0"
        allowablewocode=""
        autowo="0"
        autowocode=""
        riskwocode=""
        riskpercent="0"
    />
<finclass
    id="fclass2"
    name="DOUBLE INSURANCE COVERAGE"
    code="DC"
    billins="1"
    billllab="1"
    ca="0"
    responsible="1"
    accttype="ac_type4"
    acceptassign="1"
    allowablewocode="WOINS"
    autowo="0"
    autowocode="None"
    riskwocode="None"
    riskpercent="0"
/>
<finclass
    id="fclass4"
    name="FULL FEE
SCHEDULE"
    code="FF"
    billins="1"
    billllab="1"
    ca="0"
    responsible="1"

```

```

        accttype="ac_type4"
        acceptassign="1"
        allowablewocode="WOINS"
        autowo="0"
        autowocode="None"
        riskwocode="None"
        riskpercent="0"
    />
<finclass
    id="fclass6"
    name="MONTGOMERY HEALTH"
    code="MH"
    billins="1"
    billlab="1"
    ca="0"
    responsible="1"
    accttype="ac_type4"
    acceptassign="1"
    allowfeesched="feesch21103"
    allowablewocode="WOINS"
    autowo="0"
    autowocode="WOCOUR"
    riskwocode="None"
    riskpercent="0"
/>
<finclass
    id="fclass8"
    name="MEDICARE"
    code="MC"
    billins="1"
    billlab="1"
    ca="0"
    responsible="1"
    accttype="ac_type4"

```

```

acceptassign="1"
allowfeesched="feesch21110"
allowablewocode="WOINS"
autowo="0"
autowocode="WOINS"
riskwocode="None"
riskpercent="0"
/>
<finclass
  id="fclass10"
  name="MEDICAID"
  code="MD"
  billins="1"
  billlab="1"
  ca="0"
  responsible="1"
  accttype="ac_type5"
  acceptassign="1"
  allowfeesched="feesch21111"
  allowablewocode="WOINS"
  autowo="1"
  autowocode="WOINS"
  riskwocode="None"
  riskpercent="0"
/>
<finclass
  id="fclass12"
  name="SELF PAY"
  code="SP"
  billins="0"
  billlab="1"
  ca="0"
  responsible="0"
  accttype="ac_type4"

```

```

acceptassign="1"
allowablewocode="None"
autowo="0"
autowocode="None"
riskwocode="None"
riskpercent="0"
/>
<finclass
  id="fclass14"
  name="WORKERS COMP"
  code="WC"
  billins="1"
  billllab="1"
  ca="0"
  responsible="1"
  accttype="ac_type4"
  acceptassign="1"
  allowablewocode="WOINS"
  autowo="1"
  autowocode="WOWC"
  riskwocode="None"
  riskpercent="0"
/>
<finclass
  id="fclass16"
  name="CHANGE THIS!!!!"
  code="XX"
  billins="1"
  billllab="1"
  ca="0"
  responsible="0"
  accttype="ac_type4"
  acceptassign="1"
  allowfeesched="feesch21093"

```

```

allowablewocode="WOINS"
autowo="0"
autowocode="None"
riskwocode="None"
riskpercent="0"
/>
<finclass
  id="fclass18"
  name="NO PAY"
  code="NP"
  billins="0"
  billlab="1"
  ca="0"
  responsible="0"
  acceptassign="0"
  allowfeesched="feesch21093"
  allowablewocode="WOCOUR"
  autowo="0"
  autowocode="WOCOUR"
  riskwocode=""
  riskpercent="0"
/>
<finclass
  id="fclass19"
  name="TEST"
  code="TE"
  billins="1"
  billlab="1"
  ca="0"
  responsible="1"
  accttype="ac_type4"
  acceptassign="1"
  allowablewocode="None"
  autowo="0"

```

```

        autowocode=""
        riskwocode=""
        riskpercent="0"
    />
<finclass
    id="fclass24"
    name="BLUECROSS BLUESHIELD"
    code="BA"
    billins="1"
    billlab="1"
    ca="0"
    responsible="1"
    accttype="ac_type4"
    acceptassign="1"
    allowfeesched="feesch21107"
    allowablewocode="WOINS"
    autowo="0"
    autowocode=""
    riskwocode=""
    riskpercent="0"
/>
<finclass
    id="fclass25"
    name="TRICARE"
    code="TC"
    billins="1"
    billlab="1"
    ca="0"
    responsible="1"
    accttype="ac_type4"
    acceptassign="1"
    allowfeesched="feesch21112"
    allowablewocode="WOINS"
    autowo="0"

```

```

        autowocode=""
        riskwocode=""
        riskpercent="0"
    />
<finclass
    id="fclass26"
    name="AETNA"
    code="AT"
    billins="1"
    billlab="1"
    ca="0"
    responsible="1"
    accttype="ac_type4"
    acceptassign="1"
    allowfeesched="feesch21104"
    allowablewocode="WOINS"
    autowo="0"
    autowocode="WOINS"
    riskwocode=""
    riskpercent="0"
/>
<finclass
    id="fclass27"
    name="CIGNA"
    code="CA"
    billins="1"
    billlab="1"
    ca="0"
    responsible="1"
    accttype="ac_type4"
    acceptassign="1"
    allowfeesched="feesch21108"
    allowablewocode="WOINS"
    autowo="0"

```

```

        autowocode=""
        riskwocode=""
        riskpercent="0"
    />
<finclass
    id="fclass28"
    name="UNITED HEALTHCARE"
    code="UH"
    billins="1"
    billlab="1"
    ca="0"
    responsible="1"
    accttype="ac_type4"
    acceptassign="1"
    allowfeesched="feesch21113"
    allowablewocode="WOINS"
    autowo="0"
    autowocode=""
    riskwocode=""
    riskpercent="0"
/>
<finclass
    id="fclass29"
    name="ALTIUS"
    code="AS"
    billins="1"
    billlab="1"
    ca="0"
    responsible="1"
    accttype="ac_type4"
    acceptassign="1"
    allowfeesched="feesch21106"
    allowablewocode="WOINS"
    autowo="0"

```

```

        autowocode=""
        riskwocode=""
        riskpercent="0"
    />
    <finclass
        id="fclass30"
        name="IHC"
        code="IH"
        billins="1"
        billlab="1"
        ca="0"
        responsible="1"
        accttype="ac_type4"
        acceptassign="1"
        allowfeesched="feesch21109"
        allowablewocode="WOINS"
        autowo="0"
        autowocode=""
        riskwocode=""
        riskpercent="0"
    />
</finclasslist>
</profile>
</profilelist>
<carrierlist />
<proccodelist />
<modcodelist />
<diagcodelist />
<facilitylist />
<statuslist />
<refproviderlist>
    <refprovider
        id="rprov505"
        name="BABBIT,CASEY"

```

```

        code="BABBIT"
        specialty=""
        practicename=""
    >
    <address
        address1=""
        address2=""
        city=""
        state=""
        zip=""
        areacode="334"
    />
    <contactinfo
        name=""
        homephone=""
        officephone=""
        fax=""
        officeext=""
        otherphone=""
        othertype="C"
        email=""
    />
    </refprovider>
</refproviderlist>
<notelist />
</Results>
<Error />
</PPMDResults>;

```

Sample JSON:

```
{
```

```

"PPMDResults": {
  "Results": {
    "@success": "1",
    "patientlist": {
      "patient": {
        "@dob": "12/04/1965",
        "@deceased": "",
        "@name": "AMI,MON",
        "@respparty": "resp148880",
        "@profile": "prov31",
        "@insorder": "",
        "@sex": "M",
        "@chart": "44",
        "@maritalstatus": "2",
        "@employerid": "",
        "@employer": "IBM, INC.",
        "@ssn": "",
        "@finclasscode": "CC",
        "@id": "pat198655",
        "@title": "MR",
        "@relationship": "1",
        "@hipaarelationship": "",
        "address": {
          "@zip": "38834",
          "@city": "CORINTH",
          "@state": "MS",
          "@address1": "APT B-5",
          "@address2": "6923 N MOUNTAINSIDE DR",
          "@areacode": "662"
        },
        "contactinfo": {
          "@name": "",
          "@homephone": "(662) 555-1343",
          "@officephone": "(662) 555-9238",

```

```

        "@officeext": "213",
        "@otherphone": "(662) 555-3823",
        "@othertype": "C",
        "@email": "MONAMI@IBM.COM"
    },
    "arbucketlist": {
        "arbucket": [
            {
                "@buckettype": "p",
                "@current": "0.00",
                "@past30": "0.00",
                "@past60": "0.00",
                "@past90": "0.00",
                "@past120": "0.00",
                "@unapplied": "0.00",
                "@total": "0.00"
            },
            {
                "@buckettype": "pi",
                "@current": "0.00",
                "@past30": "0.00",
                "@past60": "0.00",
                "@past90": "0.00",
                "@past120": "0.00",
                "@unapplied": "0.00",
                "@total": "0.00"
            }
        ]
    }
},
"resppartylist": {
    "respparty": {
        "@id": "resp148880",

```

```

"@name": "AMI,MON",
"@accttype": "ac_type12",
"@acctnum": "148880",
"@dob": "12/04/1965",
"@sex": "M",
"@title": "MR",
"@employer": "IBM, INC.",
"@employstatus": "1",
"@ssn": "",
"@sendstmt": "1",
"@stmtrestart": "",
"@billcycle": "27",
"@fincharge": "1",
"@stmtformat": "",
"@balancefwd": "1",
"@lastpmtdate": "",
"@lastpmtamount": "",
"@laststmtdate": "",
"@laststmtamount": "",
"address": {
  "@zip": "38834",
  "@city": "CORINTH",
  "@state": "MS",
  "@address1": "APT B-5",
  "@address2": "6923 N MOUNTAINSIDE DR",
  "@areacode": "662"
},
"contactinfo": {
  "@name": "",
  "@homephone": "(662) 555-1343",
  "@officephone": "(662) 555-9238",
  "@officeext": "213",
  "@otherphone": "(662) 555-3823",
  "@othertype": "C",

```

```

    "@email": "MONAMI@IBM.COM"
  },
  "arbucketlist": {
    "arbucket": [
      {
        "@buckettype": "r",
        "@current": "0.00",
        "@past30": "0.00",
        "@past60": "0.00",
        "@past90": "0.00",
        "@past120": "0.00",
        "@unapplied": "0.00",
        "@total": "0.00"
      },
      {
        "@buckettype": "ri",
        "@current": "0.00",
        "@past30": "0.00",
        "@past60": "0.00",
        "@past90": "0.00",
        "@past120": "0.00",
        "@unapplied": "0.00",
        "@total": "0.00"
      }
    ]
  },
  "familymemberlist": {
    "familymember": {
      "@id": "family198655",
      "@name": "AMI,MON",
      "@chart": "44",
      "@isrp": "1",
      "contactinfo": {
        "@homephone": "(662) 555-1343"
      }
    }
  }
}

```

```

    },
    "address": {
      "@zip": "38834",
      "@city": "CORINTH",
      "@state": "MS",
      "@address1": "APT B-5",
      "@address2": "6923 N MOUNTAINSIDE DR"
    }
  }
}
}
}
}
},
"Error": null
}
}

```

Notes:

- *In order to input the middle name, the format for the "name" attribute is: "<LastName>, <FirstName> <space> <MiddleName>"*
- *The patient created will create itself as the responsible party, if it needs to be changed you will need to use the Update Patient to change the value to the corresponding responsible party. You can't assign/create a different responsible party during the patient creation process.*
- *The minimum required attributes for this call are: chart, relationship, hipaarerelationship, profile*
- *If the "finclass" attribute is empty or missing, the value will be obtained by first attempting to get the default financial class in*

system defaults. If the system default is not set, the first available, non-deleted financial class for the licensekey will be selected.

- *name: Must be in the format "lastname,firstname" (no space after the comma)*
- *sex: Valid values are "M", "F", and "U" (unknown)*
- *relationship:*
 - *1: Self*
 - *2:Spouse*
 - *3: Child*
 - *4: Other*
- *hipaarelationship and relationship attribute: Both relationships should be simultaneously maintained when the patient or insurance relationship is changed. Below is a table showing the relationship cross matches. The bolded items are the default HIPAA relationship for the standard relationship. For example if you have the value for the attribute relationship="1" then set the attribute hipaarelationship="18". If attribute relationship="3" then set the attribute hipaarelationship="19". If for example you are going by the attribute hipaarelationship="10" then select the corresponding standard relationship of 3 (relationship="3").*

Standard Relationship	HIPAA Relationship
1-SELF	18-SELF
2-SPOUSE	01-SPOUSE
3-CHILD	09-ADOPTED CHILD 10-FOSTER CHILD 17-STEPSON OR STEPDAUGHTER 19-CHILD 36-EMANCIPATED MINOR 43-CHILD WHERE INSURED HAS NO FINANCIAL RESPONSIBILITY

4-OTHER	04-GRANDFATHER OR GRANDMOTHER 05-GRANDSON OR GRANDDAUGHTER 07-NEPHEW OR NIECE 15-WARD 20-EMPLOYEE 21-UNKNOWN 22-HANDICAPPED DEPENDENT 23-SPONSORED DEPENDENT 24-DEPENDENT OF A MINOR DEPENDENT 29-SIGNIFICANT OTHER 32-MOTHER 33-FATHER 34-OTHER ADULT 39-ORGAN DONOR 40-CADAVER DONOR 41-INJURED PLAINTIFF 53-LIFE PARTNER G8-OTHER RELATIONSHIP
---------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

Notes:

- *dob: Nearly any recognizable format is supported, but "mm/dd/yyyy" is preferred.*
- *ssn: Can be submitted with or without hyphens.*
- *chart: "AUTO" indicates that the chart number should be generated by the system. A specific chart number can also be submitted (any alphanumeric string) provided it is not being used by another patient, as chart number is a unique value for each patient.*
- *profile: ID of an existing provider's profile.*
- *finclass: ID of financial class.*
- *deceased: Empty if the patient is still alive; otherwise a valid date.*
- *title: MR, MRS, MS, MISS, DR, JR, SR, II, I.*
- *maritalstatus:*
 - *1: Single*
 - *2: Married*

- 3: Divorced
- 4: Legally separated
- 5: Widowed
- 6: Unknown
- *insorder*: Should always be "" for a new patient, since no insurance coverages have been added yet.
- *employer*: This field should be used with caution, as some offices store employers as free text (*employer*="employer name") and others use an employer system setting (master file) (*employerid*="empl123"). Submitting the wrong type will cause the data for this field to be lost.
- Adding the "force" attribute and setting this to 1 will allow the call to bypass the Name/DOB duplicate check, SSN duplicate check and the Chart Number duplicate check.
- *additionalmrn*: Can be added to the request.

Update a Patient

Action: updatepatient

Sample XML:

```
<ppmdmsg action="updatepatient" class="api" msgtime="5/22/2015
2:48:08 PM" force="1">
  <patientlist>
    <patient id="198655" o_employer="IBM, INC."
employer="IBM, INC">
      <address/>
      <contactinfo/>
    </patient>
  </patientlist>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "updatepatient",
    "@class": "api",
    "@msgtime": "5/22/2015 2:48:08 PM",
    "@force": "1",
    "patientlist": {
      "patient": {
        "@id": "198655",
        "@o_employer": "IBM, INC.",
        "@employer": "IBM, INC",
        "@address": null,
        "@additionalmrn": "SomeMrn",
        "@contactinfo": null
      }
    }
  }
}
```

```
}  
}
```

Results:

Sample XML:

```
<PPMResults>  
  <Results success="1">  
    <patientlist>  
      <patient dob="12/04/1965" deceased=""  
name="AMI,MON" respparty="resp148880" profile="prov31"  
insorder="" sex="M" chart="44" maritalstatus="2" employerid=""  
employer="IBM, INC." ssn="" finclasscode="CC" id="pat198655"  
title="MR" relationship="1" hipaarelationship="">  
        <address zip="38834" city="CORINTH" state="MS"  
address1="APT B-5" address2="6923 N MOUNTAINSIDE DR"  
areacode="662" />  
        <contactinfo name="" homephone="(662) 555-  
1343" officephone="(662) 555-9238" officeext="213"  
otherphone="(662) 555-3823" othertype="C"  
email="MONAMI@IBM.COM" />  
        <arbucketlist>  
          <arbucket buckettype="p" current="0.00"  
past30="0.00" past60="0.00" past90="0.00" past120="0.00"  
unapplied="0.00" total="0.00" />  
          <arbucket buckettype="pi" current="0.00"  
past30="0.00" past60="0.00" past90="0.00" past120="0.00"  
unapplied="0.00" total="0.00" />  
        </arbucketlist>  
      </patient>  
    </patientlist>  
    <resppartylist>  
      <respparty id="resp148880" name="AMI,MON"  
accttype="ac_type12" acctnum="148880" dob="12/04/1965" sex="M"  
title="MR" employer="IBM, INC." employstatus="1" ssn=""  
sendstmt="1" stmtrestart="" billcycle="27" fincharge="1"  
stmtformat="" balancefwd="1" lastpmtdate="" lastpmtamount=""  
laststmtdate="" laststmtamount="">  
        <address zip="38834" city="CORINTH" state="MS"  
address1="APT B-5" address2="6923 N MOUNTAINSIDE DR"
```

```

areacode="662" />
        <contactinfo name="" homephone="(662) 555-
1343" officephone="(662) 555-9238" officeext="213"
otherphone="(662) 555-3823" othertype="C"
email="MONAMI@IBM.COM" />
        <arbucketlist>
                <arbucket buckettype="r" current="0.00"
past30="0.00" past60="0.00" past90="0.00" past120="0.00"
unapplied="0.00" total="0.00" />
                <arbucket buckettype="ri" current="0.00"
past30="0.00" past60="0.00" past90="0.00" past120="0.00"
unapplied="0.00" total="0.00" />
        </arbucketlist>
        <familymemberlist>
                <familymember id="family198655" name="AMI,MON"
chart="44" isrp="1">
                        <contactinfo homephone="(662) 555-1343" />
                        <address zip="38834" city="CORINTH"
state="MS" address1="APT B-5" address2="6923 N MOUNTAIN INSIDE
DR" />
                </familymember>
        </familymemberlist>
</respparty>
</resppartylist>
</Results>
<Error />
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "@success": "1",
      "patientlist": {
        "patient": {
          "@dob": "12/04/1965",

```

```

"@deceased": "",
"@name": "AMI,MON",
"@respparty": "resp148880",
"@profile": "prov31",
"@insorder": "",
"@sex": "M",
"@chart": "44",
"@maritalstatus": "2",
"@employerid": "",
"@employer": "IBM, INC.",
"@ssn": "",
"@finclasscode": "CC",
"@id": "pat198655",
"@title": "MR",
"@relationship": "1",
"@hipaarelationship": "",
"address": {
  "@zip": "38834",
  "@city": "CORINTH",
  "@state": "MS",
  "@address1": "APT B-5",
  "@address2": "6923 N MOUNTAIN INSIDE DR",
  "@areacode": "662"
},
"contactinfo": {
  "@name": "",
  "@homephone": "(662) 555-1343",
  "@officephone": "(662) 555-9238",
  "@officeext": "213",
  "@otherphone": "(662) 555-3823",
  "@othertype": "C",
  "@email": "MONAMI@IBM.COM"
},
"arbucketlist": {

```



```

    "arbucket": [
      {
        "@buckettype": "p",
        "@current": "0.00",
        "@past30": "0.00",
        "@past60": "0.00",
        "@past90": "0.00",
        "@past120": "0.00",
        "@unapplied": "0.00",
        "@total": "0.00"
      },
      {
        "@buckettype": "pi",
        "@current": "0.00",
        "@past30": "0.00",
        "@past60": "0.00",
        "@past90": "0.00",
        "@past120": "0.00",
        "@unapplied": "0.00",
        "@total": "0.00"
      }
    ]
  }
},
"resppartylist": {
  "respparty": {
    "@id": "resp148880",
    "@name": "AMI,MON",
    "@accttype": "ac_type12",
    "@acctnum": "148880",
    "@dob": "12/04/1965",
    "@sex": "M",
    "@title": "MR",

```

```

"@employer": "IBM, INC.",
"@employstatus": "1",
"@ssn": "",
"@sendstmt": "1",
"@stmtrestart": "",
"@billcycle": "27",
"@fincharge": "1",
"@stmtformat": "",
"@balancefwd": "1",
"@lastpmtdate": "",
"@lastpmtamount": "",
"@laststmtdate": "",
"@laststmtamount": "",
"address": {
  "@zip": "38834",
  "@city": "CORINTH",
  "@state": "MS",
  "@address1": "APT B-5",
  "@address2": "6923 N MOUNTAINSIDE DR",
  "@areacode": "662"
},
"contactinfo": {
  "@name": "",
  "@homephone": "(662) 555-1343",
  "@officephone": "(662) 555-9238",
  "@officeext": "213",
  "@otherphone": "(662) 555-3823",
  "@othertype": "C",
  "@email": "MONAMI@IBM.COM"
},
"arbucketlist": {
  "arbucket": [
    {
      "@buckettype": "r",

```

```

        "@current": "0.00",
        "@past30": "0.00",
        "@past60": "0.00",
        "@past90": "0.00",
        "@past120": "0.00",
        "@unapplied": "0.00",
        "@total": "0.00"
    },
    {
        "@buckettype": "ri",
        "@current": "0.00",
        "@past30": "0.00",
        "@past60": "0.00",
        "@past90": "0.00",
        "@past120": "0.00",
        "@unapplied": "0.00",
        "@total": "0.00"
    }
]
},
"familymemberlist": {
    "familymember": {
        "@id": "family198655",
        "@name": "AMI,MON",
        "@chart": "44",
        "@isrp": "1",
        "contactinfo": {
            "@homephone": "(662) 555-1343"
        },
        "address": {
            "@zip": "38834",
            "@city": "CORINTH",
            "@state": "MS",
            "@address1": "APT B-5",

```

```

        "@address2": "6923 N MOUNTAIN SIDE DR"
    }
}
}
}
},
"Error": null
}
}

```

Notes: When updating a patient, only modified fields (old and new values) are submitted. The old value is placed in `o_attributename` and the new value is placed in `attributename`. In the above example, the `o_employer` contains the old value and the `employer` contains the new value. The old value is included so that the system can determine if another user has modified the value since the data was retrieved.

If another user has modified, the following error message will be returned:

```

<PPMDResults>
  <Results/>
  <Error>
    <Fault>
      <faultcode>Client</faultcode>
      <faultstring>Client Error</faultstring>
      <detail>
        <code>-2147217398</code>
        <description>Another user has changed this patient
record.</description>
        <class>PPMD_Demographics.DemographicsTrans</class>
        <method>UpdatePatient</method>
      </detail>
    </Fault>
  </Error>
</Results>
</PPMDResults>

```

```

        <linenum>0</linenum>
        <source></source>
        <extrainfo>
            <requestinfo>...</requestinfo>
        </extrainfo>
    </detail>
</Fault>
</Error>
</PPMDResults>

```

Resubmitting the same action with the force="1" attribute and removing all o_ attributename from the XML will cause the other user's changes to be overwritten.

Here is the list of fields that can be updated with updatepatient.

Element	Field
---------	-------

patient	name
	dob
	deceased
	sex
	title
	ssn
	respparty
	profile
	insorder
	relationship
	hipaarelationship
	chart
	maritalstatus
	employerid
	employer
	finclass
	additionalmrn
address	address1
	address2
	zip
	city
	state

contactinfo	homephone
	officephone
	fax
	officeext
	otherphone
	othertype
	email

Get Patient Demographic Info - class="api"

Class: api

Action: getdemographic

Sample XML:

```
<ppmdmsg action="getdemographic" class="api"
msgtime="5/22/2015 3:02:40 PM" patientid="198655"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getdemographic",
    "@class": "api",
    "@msgtime": "5/22/2015 3:02:40 PM",
    "@patientid": "198655"
  }
}
```

Results:

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-4-589b69fcf6-gpz7c"
lst="02/10/2025 07:23:44">
  <Results>
    <patientlist>
      <patient id="pat11117715" importid="" dob="12/04/1966"
deceased="" inactive="" inactivestatus="" inactivetitle=""
inactivedescription="" name="AMI,MON 7" preferredlastname=""
preferredfirstname="" preferredmiddlename="" previouslastname=""
previousfirstname="" previousmiddlename="" respparty="resp13062907"
```

```

isinvoiceentity="0" profile="prof3" insorder="" sex="M"
genderidentity="" genderidentityother="" orientation=""
orientationother="" chart="3221" maritalstatus="2" employerid=""
employer="IBM, INC." ssn="" finclasscode="XX" title="MR" prefix="MR"
suffix="" relationship="1" hipaarelationship="18" languageid=""
ethnicityid="" language="" ethnicity="" races="" recalcbuckets="0"
additionalmrn=""></patient>

    </patientlist>

</Results>

</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "patientlist": {
        "patient": {
          "@id": "pat11117715",
          "@importid": "",
          "@dob": "12/04/1966",
          "@deceased": "",
          "@inactive": "",
          "@inactivestatus": "",
          "@inactivetitle": "",
          "@inactivedescription": "",
          "@name": "AMI,MON 7",
          "@preferredlastname": "",
          "@preferredfirstname": "",
          "@preferredmiddlename": "",
          "@previouslastname": "",
          "@previousfirstname": "",
          "@previousmiddlename": "",
          "@respparty": "resp13062907",
          "@isinvoiceentity": "0",

```

```

        "@profile": "prof3",
        "@insorder": "",
        "@sex": "M",
        "@genderidentity": "",
        "@genderidentityother": "",
        "@orientation": "",
        "@orientationother": "",
        "@chart": "3221",
        "@maritalstatus": "2",
        "@employerid": "",
        "@employer": "IBM, INC.",
        "@ssn": "",
        "@finclasscode": "XX",
        "@title": "MR",
        "@prefix": "MR",
        "@suffix": "",
        "@relationship": "1",
        "@hipaarelationship": "18",
        "@languageid": "",
        "@ethnicityid": "",
        "@language": "",
        "@ethnicity": "",
        "@races": "",
        "@recalcbuckets": "0",
        "@additionalmrn": ""
    }
}
},
"@s": "advancedmd-api-processrequest-4-589b69fcf6-gpz7c",
"@lst": "02/10/2025 07:23:44"
}
}

```

Get Patient Demographic Info - class="demographics"

Class: demographics

Action: getdemographic

The demographics version of the getdemographics call is similar to the API version of the getdemographics call. The main difference between the two calls is that the demographics version returns much more data. From a performance perspective, it is recommended that you use the API version whenever possible. But if you need data from the elements listed below, you should use the demographics version.

Note: This API call returns all of the files from the **Chart Files** tab. The ID can then be used with **getfile** API calls to pull the actual files.

Additional elements returned by the demographics version of the getdemographic call are:

- "patient/insplanlist"
- "patient/refplanlist"
- "patient/memolist"
- "patient/filelist"
- "patient/visitlist"
- "Results/carrierlist"
- "Results/proccodelist"
- "Results/mododelist"
- "Results/diagodelist"
- "Results/facilitylist"
- "Results/statuslist"
- "Results/refproviderlist"
- "Results/notelist"

Sample XML:

```
<ppmdmsg action="getdemographic" class="demographics"
msgtime="7/11/2006 10:41:22 PM" patientid="60036"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getdemographic",
    "@class": "demographics",
    "@msgtime": "7/11/2006 10:41:22 PM",
    "@patientid": "60036"
  }
}
```

Results:

Sample XML:

```
<?xml version="1.0"?>
< PPMDResults s="BWF2">
  <Results>
    <patientlist>
      <patient dob="12/01/2005" deceased="" name="KHAN,TEA199"
respparty="resp64392" profile="prof5" insorder="1" sex="F"
chart="2950" maritalstatus="1" employerid="" employer=""
ssn="" finclasscode="IP" id="pat60036" title="MS"
relationship="1" hipaarelationship="18"
patientportalaccountexists="0">
        <address zip="85741" city="TUCSON" state="AZ"
address1="" address2="" areacode="520" countrycode=""/>
        <contactinfo name="" homephone="" officephone=""
officeext="" otherphone="" othertype="C" email=""/>
      <arbucketlist>
        <arbucket buckettype="p" current="0.00"
past30="0.00" past60="0.00" past90="0.00" past120="20.00"
unapplied="0.00" total="20.00"/>
      </arbucketlist>
    </patientlist>
  </Results>
</PPMDResults>
```

```

        <arbucket buckettype="pi" current="0.00"
past30="0.00" past60="0.00" past90="0.00" past120="381.88"
unapplied="0.00" total="381.88"/>

    </arbucketlist>

    <insplanlist>

        <insplan id="ins32909" carrier="car613"
begindate="01/02/2006" enddate="" copay="10.00" copaytype="$"
coverage="1" subscriber="resp64392"
subscribernum="77777719912345" relationship="1"
hipaarelationship="18" sequence="1" grpname="" grpnum=""
studentstatus="" mspcode="" deductible="0" deductiblemet="0"
yearendmonth="1" lifetime="0">

            <insnote insnotefid="14961">

            </insnote>

        </insplan>

    </insplanlist>

    <refplanlist>

        <refplan id="rplan65906" refprov="rprov119" type="I"
reason="SELF-REFERRAL" preauthreq="0" preauth="" refnum=""
facility="fac1" proccode="" diagcodes=""
begindate="12/24/2005" enddate="" maxvisits="" usedvisits="0"
maxamount="" usedamount="0.00" status="status1" sequence="1"
notes="" ismain="1"/>

    </refplanlist>

    <memolist/>

    <filelist/>

    <visitlist/>

</patient>

</patientlist>

<resppartylist>

    <respparty id="resp64392" name="KHAN,TEA199"
accttype="ac_type3" acctnum="64392" dob="12/01/2005" sex="F"
title="MS" employer="" employstatus="1" ssn="" sendstmt="1"
stmtrestart="03/08/2000" billcycle="1" fincharge="0"
stmtformat="" balancefwd="0" lastpmtdate="" lastpmtamount=""
laststmtdate="" laststmtamount="">

        <address zip="85741" city="TUCSON" state="AZ"
address1="" address2="" areacode="520" countrycode=""/>

        <contactinfo name="" homephone="" officephone=""
officeext="" otherphone="" othertype="C" email=""/>

    </arbucketlist>

    <arbucket buckettype="r" current="0.00"

```

```

past30="0.00" past60="0.00" past90="0.00" past120="20.00"
unapplied="0.00" total="20.00"/>

    <arbucket buckettype="ri" current="0.00"
past30="0.00" past60="0.00" past90="0.00" past120="381.88"
unapplied="0.00" total="381.88"/>
    </arbucketlist>
    <familymemberlist>
        <familymember id="family60036" name="KHAN,TEA199"
chart="2950" isrp="1">
            <contactinfo homephone=""/>
            <address zip="85741" city="TUCSON" state="AZ"
address1="" address2="" countrycode=""/>
        </familymember>
    </familymemberlist>
</respparty>
</resppartylist>
<accttypelist>
    <accttype id="ac_type3" name="TAKE WHAT INSURANCE PAYS"
code="IP"/>
</accttypelist>
<profilelist>
    <profile id="prof5" name="HARRIS,JAMES" code="HARRIS"
chargefeesched="feesch21092" fullinactive="No"
status="ACTIVE">
        <finclasslist>
            <finclass id="fclass1" name="" code="" billins="0"
billllab="1" ca="0" responsible="0" acceptassign="0"
allowablewocode="" autowo="0" autowocode="" riskwocode=""
riskpercent="0"/>
            <finclass id="fclass2" name="DOUBLE INSURANCE
COVERAGE" code="DC" billins="1" billllab="1" ca="0"
responsible="1" accttype="ac_type4" acceptassign="1"
allowablewocode="WOINS" autowo="0" autowocode="None"
riskwocode="None" riskpercent="0"/>
            <finclass id="fclass4" name="FULL FEE SCHEDULE"
code="FF" billins="1" billllab="1" ca="0" responsible="1"
accttype="ac_type4" acceptassign="1" allowablewocode="WOINS"
autowo="0" autowocode="None" riskwocode="None"
riskpercent="0"/>
        </finclasslist>
    </profile>

```

```

    </profilelist>
    <carrierlist>
      <carrier id="car613" name="AARP CA" preauthphone=""
code="AARP1" eligibilityphone="" billzerodollarclaims="0"
dme="0">
        <address zip="90712" city="LAKEWOOD" state="CA"
address1="" address2="3200 E CARSON ST" areacode=""/>
        <contactinfo name="" officephone="" officeext=""
email="" fax=""/>
      </carrier>
    </carrierlist>
    <proccodelist/>
    <modcodelist/>
    <diagcodelist/>
    <facilitylist/>
    <statuslist/>
    <refproviderlist>
      <refprovider id="rprov119" name="LAIRD,MARTHA E"
code="LAIMA" specialty="OBSTETRICS/GYNECOLOGY"
practicenname="">
        <address address1="" address2="2300 N ROSEMONT BLVD"
city="TUCSON" state="AZ" zip="85712-2139" areacode="520"/>
        <contactinfo name="" homephone="" officephone="(520)
881-1977" fax="" officeext="" otherphone="" othertype="C"
email=""/>
      </refprovider>
    </refproviderlist>
    <notelist/>
  </Results>
  <Error/>
</PPMDResults>

```

Sample JSON:

```

{
  "?xml": {

```

```

    "@version": "1.0"
  },
  "PPMDResults": {
    "@s": "BWF2",
    "Results": {
      "patientlist": {
        "patient": {
          "@dob": "12/01/2005",
          "@deceased": "",
          "@name": "KHAN,TEA199",
          "@respparty": "resp64392",
          "@profile": "prof5",
          "@insorder": "1",
          "@sex": "F",
          "@chart": "2950",
          "@maritalstatus": "1",
          "@employerid": "",
          "@employer": "",
          "@ssn": "",
          "@finclasscode": "IP",
          "@id": "pat60036",
          "@title": "MS",
          "@relationship": "1",
          "@hipaarelationship": "18",
          "@patientportalaccountexists": "0",
          "address": {
            "@zip": "85741",
            "@city": "TUCSON",
            "@state": "AZ",
            "@address1": "",
            "@address2": "",
            "@areacode": "520",
            "@countrycode": ""
          }
        },
      },
    },
  },

```

```

"contactinfo": {
  "@name": "",
  "@homephone": "",
  "@officephone": "",
  "@officeext": "",
  "@otherphone": "",
  "@othertype": "C",
  "@email": ""
},
"arbucketlist": {
  "arbucket": [
    {
      "@buckettype": "p",
      "@current": "0.00",
      "@past30": "0.00",
      "@past60": "0.00",
      "@past90": "0.00",
      "@past120": "20.00",
      "@unapplied": "0.00",
      "@total": "20.00"
    },
    {
      "@buckettype": "pi",
      "@current": "0.00",
      "@past30": "0.00",
      "@past60": "0.00",
      "@past90": "0.00",
      "@past120": "381.88",
      "@unapplied": "0.00",
      "@total": "381.88"
    }
  ]
},
"insplanlist": {

```

```

"insplan": {
  "@id": "ins32909",
  "@carrier": "car613",
  "@begindate": "01/02/2006",
  "@enddate": "",
  "@copay": "10.00",
  "@copaytype": "$",
  "@coverage": "1",
  "@subscriber": "resp64392",
  "@subscribernum": "77777719912345",
  "@relationship": "1",
  "@hipaarelationship": "18",
  "@sequence": "1",
  "@grpname": "",
  "@grpnum": "",
  "@studentstatus": "",
  "@mspcode": "",
  "@deductible": "0",
  "@deductiblemet": "0",
  "@yearendmonth": "1",
  "@lifetime": "0",
  "insnote": {
    "@insnotefid": "14961"
  }
},
"refplanlist": {
  "refplan": {
    "@id": "rplan65906",
    "@refprov": "rprov119",
    "@type": "I",
    "@reason": "SELF-REFERRAL",
    "@preauthreq": "0",
    "@preauth": "",

```

```

        "@refnum": "",
        "@facility": "fac1",
        "@proccode": "",
        "@diagcodes": "",
        "@begindate": "12/24/2005",
        "@enddate": "",
        "@maxvisits": "",
        "@usedvisits": "0",
        "@maxamount": "",
        "@usedamount": "0.00",
        "@status": "status1",
        "@sequence": "1",
        "@notes": "",
        "@ismain": "1"
    }
},
    "memolist": null,
    "filelist": null,
    "visitlist": null
}
},
"resppartylist": {
    "respparty": {
        "@id": "resp64392",
        "@name": "KHAN,TEA199",
        "@accttype": "ac_type3",
        "@acctnum": "64392",
        "@dob": "12/01/2005",
        "@sex": "F",
        "@title": "MS",
        "@employer": "",
        "@employstatus": "1",
        "@ssn": "",
        "@sendstmt": "1",

```

```

"@stmtrestart": "03/08/2000",
"@billcycle": "1",
"@fincharge": "0",
"@stmtformat": "",
"@balancefwd": "0",
"@lastpmtdate": "",
"@lastpmtamount": "",
"@laststmtdate": "",
"@laststmtamount": "",
"address": {
  "@zip": "85741",
  "@city": "TUCSON",
  "@state": "AZ",
  "@address1": "",
  "@address2": "",
  "@areacode": "520",
  "@countrycode": ""
},
"contactinfo": {
  "@name": "",
  "@homephone": "",
  "@officephone": "",
  "@officeext": "",
  "@otherphone": "",
  "@othertype": "C",
  "@email": ""
},
"arbucketlist": {
  "arbucket": [
    {
      "@buckettype": "r",
      "@current": "0.00",
      "@past30": "0.00",
      "@past60": "0.00",

```

```

        "@past90": "0.00",
        "@past120": "20.00",
        "@unapplied": "0.00",
        "@total": "20.00"
    },
    {
        "@buckettype": "ri",
        "@current": "0.00",
        "@past30": "0.00",
        "@past60": "0.00",
        "@past90": "0.00",
        "@past120": "381.88",
        "@unapplied": "0.00",
        "@total": "381.88"
    }
]
},
"familymemberlist": {
    "familymember": {
        "@id": "family60036",
        "@name": "KHAN,TEA199",
        "@chart": "2950",
        "@isrp": "1",
        "contactinfo": {
            "@homephone": ""
        },
    },
    "address": {
        "@zip": "85741",
        "@city": "TUCSON",
        "@state": "AZ",
        "@address1": "",
        "@address2": "",
        "@countrycode": ""
    }
}

```

```

    }
  }
}
},
"accttypelist": {
  "accttype": {
    "@id": "ac_type3",
    "@name": "TAKE WHAT INSURANCE PAYS",
    "@code": "IP"
  }
},
"profilelist": {
  "profile": {
    "@id": "prof5",
    "@name": "HARRIS,JAMES",
    "@code": "HARRIS",
    "@chargefeesched": "feesch21092",
    "@fullinactive": "No",
    "@status": "ACTIVE",
    "finclasslist": {
      "finclass": [
        {
          "@id": "fclass1",
          "@name": "",
          "@code": "",
          "@billins": "0",
          "@billlab": "1",
          "@ca": "0",
          "@responsible": "0",
          "@acceptassign": "0",
          "@allowablewocode": "",
          "@autowo": "0",
          "@autowocode": "",
          "@riskwocode": "",

```

```

    "@riskpercent": "0"
  },
  {
    "@id": "fclass2",
    "@name": "DOUBLE INSURANCE COVERAGE",
    "@code": "DC",
    "@billins": "1",
    "@billllab": "1",
    "@ca": "0",
    "@responsible": "1",
    "@accttype": "ac_type4",
    "@acceptassign": "1",
    "@allowablewocode": "WOINS",
    "@autowo": "0",
    "@autowocode": "None",
    "@riskwocode": "None",
    "@riskpercent": "0"
  },
  {
    "@id": "fclass4",
    "@name": "FULL FEE SCHEDULE",
    "@code": "FF",
    "@billins": "1",
    "@billllab": "1",
    "@ca": "0",
    "@responsible": "1",
    "@accttype": "ac_type4",
    "@acceptassign": "1",
    "@allowablewocode": "WOINS",
    "@autowo": "0",
    "@autowocode": "None",
    "@riskwocode": "None",
    "@riskpercent": "0"
  }
}

```

```

    ]
  }
}
},
"carrierlist": {
  "carrier": {
    "@id": "car613",
    "@name": "AARP CA",
    "@preauthphone": "",
    "@code": "AARP1",
    "@eligibilityphone": "",
    "@billzerodollarclaims": "0",
    "@dme": "0",
    "address": {
      "@zip": "90712",
      "@city": "LAKEWOOD",
      "@state": "CA",
      "@address1": "",
      "@address2": "3200 E CARSON ST",
      "@areacode": ""
    },
  },
  "contactinfo": {
    "@name": "",
    "@officephone": "",
    "@officeext": "",
    "@email": "",
    "@fax": ""
  }
}
},
"proccodelist": null,
"modcodelist": null,
"diagcodelist": null,
"facilitylist": null,

```



```

    "statuslist": null,
    "refproviderlist": {
      "refprovider": {
        "@id": "rprov119",
        "@name": "LAIRD,MARTHA E",
        "@code": "LAIMA",
        "@specialty": "OBSTETRICS/GYNECOLOGY",
        "@practicename": "",
        "address": {
          "@address1": "",
          "@address2": "2300 N ROSEMONT BLVD",
          "@city": "TUCSON",
          "@state": "AZ",
          "@zip": "85712-2139",
          "@areacode": "520"
        },
        "contactinfo": {
          "@name": "",
          "@homephone": "",
          "@officephone": "(520) 881-1977",
          "@fax": "",
          "@officeext": "",
          "@otherphone": "",
          "@othertype": "C",
          "@email": ""
        }
      }
    },
    "notelist": null
  },
  "Error": null
}

```

Coverage Values

Coverage	tinyint
Primary	1
Secondary	2
Tertiary	3
Workers	4
Auto	5
DME	6

Get Patient Transaction History Details

JSON Example:

```
{
  "ppmdmsg": {
    "@nocookie": 1,
    "usercontext":
      "991024GZZ/PmVj5ITUUOuVrOPgKaAa15opfv2t1I05cryQwzVpsCKbb6rAk7
      nb6eVF8ePIGy5/2/ErXlkE60ehMe65W9EVz67Qeps9/ieDM19cJ8g+fUrP9mBM
      DCAo6vteUih8Hg0go8264SR7zWRNLM7wo2+5Njgu7iJkprtNnFa43DBVw5Gt5P
      WKiR+3VVNFd3fjw9dyngyZPwTa3M720liRggq5LZ38TFqbxvAIx120whKNpnu9
      f9qqaTlzVpbm0pi",
    "@class": "demographics",
    "@action": "gettxhistory",
    "@filterhistory": "1",
    "@pagenumber": 1,
    "@typefilter": "1",
    "@sortbypayment": "0",
    "@sortdescending": "0",
    "@sortbyaging": "-1",
    "@profileid": "",
    "@getmemo": "0",
    "@fromcollections": "-1",
    "@resppartyid": "3",
    "@msgtime": "2023-12-04 15:54:31"
  }
}
```

Add and Update Insurance Coverages

Action: addinsurance

Sample XML:

```
<ppmdmsg
  action="addinsurance"
  class="api"
  msgtime="5/18/2021 1:30:56 PM"
>
<patient id="pat5984750" changed="1">
  <insplanlist>
    <insplan
      id=""
      begindate="05/08/2021"
      enddate="05/20/2021"
      carrier="car7251"
      subscriber="resp6850572"
      subscribernum=""
      hipaarelationship="18"
      relationship="1"
      grpname=""
      grpnum=""
      copay="0.00"
      copaytype="$"
      coverage="3"
      payerid=""
      mspcode=""
      eligibilityid=""
      eligibilitystatusid=""
      eligibilitychangedat=""
      eligibilitycreatedat=""
      eligibilityresponsedate=""
```

```

        finclasscode=""
        deductible="0.00"
        deductiblemet="0.00"
        yearendmonth="1"
        lifetime="0.00"
    >
    <insnote />
</insplan>
</insplanlist>
</patient>
</ppmdmsg>;

```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "addinsurance",
    "@class": "api",
    "@msgtime": "5/18/2021 1:30:56 PM",
    "patient": {
      "@id": "pat5984750",
      "@changed": "1",
      "insplanlist": {
        "insplan": {
          "@id": "",
          "@begindate": "05/08/2021",
          "@enddate": "05/20/2021",
          "@carrier": "car7251",
          "@subscriber": "resp6850572",
          "@subscribernum": "",
          "@hipaarelationship": "18",
          "@relationship": "1",

```

```

"@grpname": "",
"@grpnum": "",
"@copay": "0.00",
"@copaytype": "$",
"@coverage": "3",
"@payerid": "",
"@mspcode": "",
"@eligibilityid": "",
"@eligibilitystatusid": "",
"@eligibilitychangedat": "",
"@eligibilitycreatedat": "",
"@eligibilityrespondedate": "",
"@finclasscode": "",
"@deductible": "0.00",
"@deductiblemet": "0.00",
"@yearendmonth": "1",
"@lifetime": "0.00",
"insnote": {
  "@self-closing": "true"
}
}
}
}
}
}
}

```

Attributes

- Required – action, class and patient
- Additionally – define @hipaarelationship attribute

Result:

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFEVWPLE" lst="5/18/2021 4:32:28 AM">
  <Results success="1">
    <patient id="ins3702532" sequence="36"
insnotefid="3911342" />
  </Results>
  <Error />
</PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFECSSFR",
    "@lst": "5/18/2021 4:34:49 AM",
    "Results": {
      "@success": "1",
      "patient": {
        "@id": "ins3702533",
        "@sequence": "37",
        "@insnotefid": "3911343"
      }
    },
    "Error": null
  }
}
```

Coverage Values

Coverage	tinyint
Primary	1
Secondary	2
Tertiary	3
Workers	4
Auto	5
DME	6

Action: updateinsurance

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "updateinsurance",
    "@class": "demographics",
    "@msgtime": "5/18/2021 1:30:56 PM",
    "patient": {
      "@id": "",
      "@insorder": "1",
      "@changed": "1",
      "insplanlist": {
        "insplan": {
          "@id": "",
          "@o_begindate": "05/08/2021",
          "@begindate": "05/08/2021",
```


"@o_enddate": "05/20/2021",
"@enddate": "05/20/2021",
"@o_carrier": "car7251",
"@carrier": "car7251",
"@o_subscriber": "resp6850572",
"@subscriber": "resp6850572",
"@o_subscribnum": "",
"@subscribnum": "",
"@o_hipaarerelationship": "18",
"@hipaarerelationship": "18",
"@o_relationship": "1",
"@relationship": "1",
"@o_grpname": "",
"@grpname": "",
"@o_grpnum": "",
"@grpnum": "",
"@o_copay": "0.00",
"@copay": "0.00",
"@o_copaytype": "\$",
"@copaytype": "\$",
"@o_coverage": "3",
"@coverage": "3",
"@o_payerid": "",
"@payerid": "",
"@o_mspcode": "",
"@mspcode": "",
"@o_eligibilityid": "",
"@eligibilityid": "",
"@o_eligibilitystatusid": "",
"@eligibilitystatusid": "",
"@o_eligibilityresponsedate": "",
"@eligibilityresponsedate": "",
"@o_finclasscode": "",
"@finclasscode": "",

```

        "@o_deductible": "0.00",
        "@deductible": "0.00",
        "@o_deductiblemet": "0.00",
        "@deductiblemet": "0.00",
        "@o_yearendmonth": "1",
        "@yearendmonth": "1",
        "@o_lifetime": "0.00",
        "@lifetime": "0.00"
    }
}
}
}
}

```

Attributes

- Required – action, class and patient
- Additionally – define @hipaarelationship attribute

Result:

Sample XML:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI2WFE8SCGP" lst="10/25/2022 9:30:29 AM">
    <Results success="1">
        <patient insorder="" />
    </Results>
    <Error />
</PPMDResults>

```

Add Patient Notes

Action:savepatientnotes

Sample XML:

```
<ppmdmsg action="savepatientnotes" class="api"
msgtime="3/29/2004 4:16:23 PM" id="198655" useclienttime="1">
  <masterfile uid="" patientfid="198655" profilefid="31"
notetypefid="40" note="Adding a new patient note number 2"/>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "savepatientnotes",
    "@class": "api",
    "@msgtime": "3/29/2004 4:16:23 PM",
    "@id": "198655",
    "@useclienttime": "1",
    "masterfile": {
      "@uid": "",
      "@patientfid": "198655",
      "@profilefid": "31",
      "@notetypefid": "40",
      "@note": "Adding a new patient note number 2"
    }
  }
}
```

Results:

This action returns an attribute newid in <PPMDResults> element that is the ID of the newly added note. If the request has an attribute ID (patient ID) in

<ppmdmsg> element, then all notes for that patient will be returned. If this ID is missing, then only there will not be any <record> elements in the return.

Sample XML:

```
<PPMDResults newid="2538">
  <record uid="2538" profilefid="31" profilecode="122455"
    profilename="CRICKET,COLE" notetypefid="40" notetypecode="01"
    createdat="3/29/2004 4:16:34 PM" note="ADDING A NEW PATIENT
    NOTE NUMBER 2" createuser="PPMD_AKHAN" changedat="3/29/2004
    4:16:34 PM" />
  <record uid="2537" profilefid="31" profilecode="122455"
    profilename="CRICKET,COLE" notetypefid="40" notetypecode="01"
    createdat="3/29/2004 4:16:18 PM" note="ADDING A NEW PATIENT
    NOTE" createuser="PPMD_AKHAN" changedat="3/29/2004 4:16:18 PM"
    />
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "@newid": "2538",
    "record": [
      {
        "@uid": "2538",
        "@profilefid": "31",
        "@profilecode": "122455",
        "@profilename": "CRICKET,COLE",
        "@notetypefid": "40",
        "@notetypecode": "01",
        "@createdat": "3/29/2004 4:16:34 PM",
        "@note": "ADDING A NEW PATIENT NOTE NUMBER 2",
        "@createuser": "PPMD_AKHAN",
        "@changedat": "3/29/2004 4:16:34 PM"
      },
      {

```

```

        "@uid": "2537",
        "@profileid": "31",
        "@profilecode": "122455",
        "@profilename": "CRICKET,COLE",
        "@notetypeid": "40",
        "@notetypecode": "01",
        "@createdat": "3/29/2004 4:16:18 PM",
        "@note": "ADDING A NEW PATIENT NOTE",
        "@createuser": "PPMD_AKHAN",
        "@changedat": "3/29/2004 4:16:18 PM"
    }
]
}
}

```

Notes:

- *id: This is the patient ID.*
- *uid: This attribute is required and leave it empty.*
- *patientid: Patient's ID.*
- *profileid: ID of an existing profile.*
- *notetypeid: Note Type ID.*

Select Patient Notes

Action: selectpatientnotes

Sample XML:

```
<ppmdmsg
  action="selectpatientnotes"
  class="masterfiles"
  msgtime="1/27/2022 2:52:56 PM"
  id="61722"
  useclienttime="1"
/>;
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "selectpatientnotes",
    "@class": "masterfiles",
    "@msgtime": "3/29/2004 4:16:23 PM",
    "@id": "5986116",
    "@useclienttime": "1"
  }
}
```

Notes:

- *id – This is the patient ID.*
- *uid – This attribute is required and leave it empty.*
- *patientid – Patient's ID.*

- *profileid* – ID of an existing profile.
- *notetypeid* – Note Type ID.

Results:

This request returns an attribute newid in <PPMDResults> element that is the ID of the selected note. If the request has an attribute ID (patient ID) in <ppmdmsg> element, then all notes for that patient will be returned. If this ID is missing, then only there will not be any <record> elements in the return.

Sample XML:

```
<?xml version="1.0" encoding="UTF-8"?>
<PPMDResults s="PRDPM3WFEVR2WJ">
  <record
    uid="5037"
    profileid="1"
    profilecode=""
    profilename=""
    notetypeid="1306"
    notetypecode="PH"
    createdat="5/24/2021 10:19:57 AM"
    createuser="PPMD_MLIGOUR"
    changedat="5/24/2021 10:19:57 AM"
  >
    <note xml:space="preserve">random note</note>
  </record>
  <record
    uid="5036"
    profileid="21"
    profilecode="EGAN"
    profilename="EGAN, CASEY"
    notetypeid="24"
    notetypecode="LR"
    createdat="5/24/2021 10:15:39 AM"
```

```

        createuser="PPMD_MLIGOUR"
        changedat="5/24/2021 10:15:39 AM"
    >
    <note xml:space="preserve">asdufhaiofbgasifu</note>
</record>
</PPMDResults>;

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI3WFEDN5KK",
    "record": [
      {
        "@uid": "5109",
        "@profilefid": "141",
        "@profilecode": "TEST",
        "@profilename": "TEST PROVIDER",
        "@notetypefid": "1305",
        "@notetypecode": "31",
        "@createdat": "2/16/2022 1:22:51 PM",
        "@createuser": "PPMD_YKRILL",
        "@changedat": "2/16/2022 1:22:51 PM",
        "note": {
          "@xml:space": "preserve",
          "#text": "ADDING A NEW PATIENT NOTE"
        }
      }
    ],
  },
}

```

```
{
  "@uid": "5073",
  "@profilefid": "147",
  "@profilecode": "ALBUS",
  "@profilename": "ALBUS DUMBLEDORE",
  "@notetypefid": "1310",
  "@notetypecode": "99",
  "@createdat": "9/2/2021 4:27:00 PM",
  "@createuser": "PPMD_MLEVYTS",
  "@changedat": "9/2/2021 4:27:00 PM",
  "note": {
    "@xml:space": "preserve",
    "#text": "Hello all, test note!"
  }
}
]
```

Save Memo

Action: savememo

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "savememo",
    "@class": "demographics",
    "@msgtime": "10/18/2022 12:20:20 PM",
    "@patientfid": "111",
    "@created": "10/18/2022",
    "@case_memotext": "this is a quick memo 2",
    "@memotype": "d",
    "@expiredate": ""
  }
}
```

Result

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI2WFEQBJSR" lst="10/18/2022 12:37:13 PM">
  <Results success="1" id="memo592088" changedat="10/18/2022
12:37:13 PM" />
  <Error />
</PPMDResults>
```

Update Memo

Action: updatememo

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "updatememo",
    "@class": "demographics",
    "@msgtime": "5/14/2024 9:48:01
AM",
    "@id": "359194",
    "@case_memotext": "test",
    "@memotype": "d",
    "@expiredate": "05/16/2024",
  }
}
```

Get Custom Patient Data

Action: getcustomdata

An office can setup custom tabs to hold data that current demographic pages do not provide a place to store. The getcustomdata retrieves the custom data for a specific patient.

Sample XML:

```
<ppmdmsg action="getcustomdata" class="providerdesktop"
msgtime="3/29/2004 4:16:23 PM"
patientid="198655" includeindemographics="1" />
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getcustomdata",
    "@class": "providerdesktop",
    "@msgtime": "3/29/2004 4:16:23 PM",
    "@patientid": "198655",
    "@includeindemographics": "1"
  }
}
```

Results:

The result set will have a list of templates and each template can have more than one instance. Each template has a list of field elements. Each field element has a value attribute that stores the answer.

Attributes:

value: This attribute contains the values entered or selected by the patient

valuecode and valuenam: For an ellipsis, the valuenam is the value that appears in the ellipsis textbox. The valuecode is the code specified for this valuenam

Sample XML:

```
<PPMDResults s="servername">
  <Results>
    <patientlist>
      <patient id="5167" visitid="158216" visitdos="03/21/2006">
        <templatelist>
          <template id="121">
            <instancelist>
              <instance id="71" createdat="2005-11-
04T15:31:43.473" createdby="PPMD_AKHAN" changedat="2006-02-
06T13:00:09." changedby="PPMD_AKHAN">
                <fieldvaluelist>
                  <fieldvalue id="442" templatefieldid="161"
ordinal="1" value="" valuecode="" valuenam=""
                    createdat="2005-11-04T15:31:43.473"
createdby="PPMD_AKHAN" changedat="2005-11-04T15:38:21."
changedby="PPMD_AKHAN"/>
                  <fieldvalue id="445" templatefieldid="163"
ordinal="1" value="1" valuecode="" valuenam="YES"
                    createdat="2005-11-04T15:42:31.427"
createdby="SYSTEM" changedat="2006-02-06T13:00:09."
changedby="PPMD_AKHAN"/>
                < /fieldvaluelist>
              </instance>
            </instancelist>
          </template>
          <template id="122">
            <instancelist>
              <instance id="72" createdat="2005-11-
04T15:53:56.260" createdby="PPMD_AKHAN" changedat="2006-01-
27T09:49:03." changedby="PPMD_AKHAN">
                <fieldvaluelist>
                  <fieldvalue id="449" templatefieldid="166"
ordinal="1" value="GOLF" valuecode="" valuenam=""
                    createdat="2005-11-04T15:53:56.260"
```

```

createdby="PPMD_AKHAN" changedat="2006-01-27T09:49:03."
changedby="PPMD_AKHAN"/>
    <fieldvalue id="448" templatefieldid="165"
ordinal="165" value="ALI1" valuecode="" valuename=""
    createdat="2005-11-04T15:53:56.260"
createdby="PPMD_AKHAN" changedat="2006-01-27T09:49:03."
changedby="PPMD_AKHAN"/>
    < /fieldvaluelist>
</instance>
</instancelist>
</template>
</templatelist>
</patient>
</patientlist>
</Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "@s": "servername",
    "Results": {
      "patientlist": {
        "patient": {
          "@id": "5167",
          "@visitid": "158216",
          "@visitdos": "03/21/2006",
          "templatelist": {
            "template": [
              {
                "@id": "121",
                "instancelist": {
                  "instance": {

```

```

"@id": "71",
"@createdat": "2005-11-04T15:31:43.473",
"@createdby": "PPMD_AKHAN",
"@changedat": "2006-02-06T13:00:09.",
"@changedby": "PPMD_AKHAN",
"fieldvaluelist": {
  "fieldvalue": [
    {
      "@id": "442",
      "@templatefieldid": "161",
      "@ordinal": "1",
      "@value": "",
      "@valuecode": "",
      "@valuenam": "",
      "@createdat": "2005-11-
04T15:31:43.473",
      "@createdby": "PPMD_AKHAN",
      "@changedat": "2005-11-
04T15:38:21.",
      "@changedby": "PPMD_AKHAN"
    },
    {
      "@id": "445",
      "@templatefieldid": "163",
      "@ordinal": "1",
      "@value": "1",
      "@valuecode": "",
      "@valuenam": "YES",
      "@createdat": "2005-11-
04T15:42:31.427",
      "@createdby": "SYSTEM",
      "@changedat": "2006-02-
06T13:00:09.",
      "@changedby": "PPMD_AKHAN"
    }
  ]
}

```



```

    }
  }
}
},
{
  "@id": "122",
  "instancetype": {
    "instance": {
      "@id": "72",
      "@createdat": "2005-11-04T15:53:56.260",
      "@createdby": "PPMD_AKHAN",
      "@changedat": "2006-01-27T09:49:03.",
      "@changedby": "PPMD_AKHAN",
      "fieldvaluelist": {
        "fieldvalue": [
          {
            "@id": "449",
            "@templatefieldid": "166",
            "@ordinal": "1",
            "@value": "GOLF",
            "@valuecode": "",
            "@valuenam": "",
            "@createdat": "2005-11-
04T15:53:56.260",
            "@createdby": "PPMD_AKHAN",
            "@changedat": "2006-01-
27T09:49:03.",
            "@changedby": "PPMD_AKHAN"
          },
          {
            "@id": "448",
            "@templatefieldid": "165",
            "@ordinal": "165",
            "@value": "ALI1",

```

Update Custom Tab

Get Patient Custom Data

```
{
  "ppmdmsg": {
    "@action": "getcustomdata",
    "@class": "providerdesktop",
    "@msgtime": "12/17/2005 11:38:52 PM",
    "@patientid": "49385",
    "@includeindemographics": "1",
    "@includeonfacesheet": "1",
    "@nocookie" : "0"
  }
}
```

Insert Patient Custom Data

```
{
  "ppmdmsg": {
    "@action": "insertcustomdata",
    "@class": "providerdesktop",
    "@msgtime": "1/10/2023 11:29:34 AM",
    "@patientid": "111",
    "@templateid": "596",
    "fieldvaluelist": {
      "fieldvalue": {
        "@templatefieldid": "7218",
        "@value": "123456789"
      }
    }
  }
}
```

Update Patient Custom Data

```

{
  "ppmdmsg": {
    "@action": "updatecustomdata",
    "@class": "providerdesktop",
    "@msgtime": "4/13/2023 10:16:51 AM",
    "@patientid": "111",
    "@templateid": "596",
    "@instanceid": "25767",
    "fieldvaluelist": {
      "fieldvalue": {
        "@id": "1731939",
        "@templatefieldid": "7218",
        "@value": "TEST"
      }
    }
  }
}

```

Get Patient Tab List

```

{
  "ppmdmsg": {
    "@action": "selectuserfiletemplates",
    "@class": "masterfiles",
    "@msgtime": "1/10/2023 10:38:08 AM",
    "@templatetype": "pt"
  }
}

```

Create New Custom Tab

```

{

```

```

"ppmdmsg": {
  "@action": "saveuserfiletemplates",
  "@class": "masterfiles",
  "@msgtime": "1/10/2023 10:51:25 AM",
  "@templatetype": "pt",
  "masterfile": {
    "fieldlist": {
      "field": {
        "@alias": "C@ALTER@AlterID",
        "@id": "-2",
        "@datatype": "Text",
        "@display": "1",
        "@ordinal": "0",
        "@name": "AlterID",
        "@defaultvaluenamename": "",
        "@defaultvaluecode": "",
        "@isrequired": "0",
        "@includeinlist": "0",
        "@includeinmailmerge": "0",
        "@defaultvalue": "",
        "@subtype": ""
      }
    },
    "@changedat": "2023-01-10 09:45:17",
    "@templatecode": "CDALT",
    "@templatename": "CustomID",
    "@issingleuse": "1",
    "@includeonfacesheet": "0",
    "@alwaysshowonfacesheet": "0",
    "@includeindemographics": "1",
    "@alwaysshowindemographics": "0",
    "@includeinmailmerge": "0",
    "@restrictupdates": "0",
    "@sortbylid": ""
  }
}

```

```
        "@sortby1desc": "1",
        "@sortby2id": "",
        "@sortby2desc": "0"
    }
}
}
```

Delete Custom Tab

```
{
  "ppmdmsg": {
    "@action": "deleteuserfiletemplates",
    "@class": "masterfiles",
    "@msgtime": "1/10/2023 10:43:20 AM",
    "@id": "594",
    "@templatetype": "pt",
    "@changedat": "2023-01-10 09:43:06"
  }
}
```

Get Patient Financial History

Action: gettxhistory

The gettxhistory retrieves the financial history for a specific patient.

Sample XML:

```
<ppmdmsg action="gettxhistory" class="demographics"
msgtime="5/21/2006
1:28:12 PM" patientid="12345" filterhistory="0" pagenumber="1"
typefilter="1" sortbypayment="0" groupbyvisit="0"
sortdescending="1"
profileid="" getmemo="0" />
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "gettxhistory",
    "@class": "demographics",
    "@msgtime": "5/21/2006 1:28:12 PM",
    "@patientid": "12345",
    "@filterhistory": "0",
    "@pagenumber": "1",
    "@typefilter": "1",
    "@sortbypayment": "0",
    "@groupbyvisit": "0",
    "@sortdescending": "1",
    "@profileid": "",
    "@getmemo": "0"
  }
}
```

Attributes:

filterhistory: set it to 0.

pagenumber: This is the page number. The attribute pagecount lets the user know how many pages are present for the data requested. To get all the data, make a request for each page till the pagecount with pagenumber starting at 1.

typefilter: 0 is All Items; 1 is Open Items; 2 is Voided Items; 3 is Unbilled Items. Voids are not returned if 1 or 3 is selected.

sortbypayment: 0 is for service type; -1 is for payment type. When set to -1, the charges are not returned with the result.

groupbyvisit: 0 when not to group data by visit; 1 when data is to be grouped by visit.

sortdescending: 1 to sort descending and 0 to sort ascending. The records are sorted by service date.

profileid: Filter by the provider profile. This is the profile ID you want to filter data by. Leave it empty to show data for all provider profiles.

getmemo: 0 to not get any memo associated with the patient; 1 to get memos associated with the patient. This only gets memos that have not expired.

fromdate: Optional attributes. Example 01/15/2006. Filters the data starting from the fromdate (service date).

todate: Optional attributes. Example 04/15/2006. Filters the data ending with the todate (service date).

Results:

The result set will have a list of charges, payments, and/or write-offs. If sort payment is set to -1 then the charges are not returned. It also provides some summary data in the <Results> element.

Sample XML:

```
<?xml version="1.0"?>< PPMDResults s="servername">
  <Results itemcount="5" pagecount="1" page="1" itemsfrom="1"
  itemsto="5" maxunfiltereddate="2006-01-21T00:00:00"
  oldestcharge="2006-01-21T00:00:00" newestcharge="2006-02-
```

```

21T00:00:00" sumpatcharges="20.00" suminscharges="1081.88"
sumpatpayments="0.00" suminspayments="444.44"
sumpatwriteoffs="0.00" suminswriteoffs="255.56">

    <chargelist>

        < charge id="102095" patientid="12345"
patient="KHAN,TEA199" proccode="00104" b="0" i="1"
createtime="2006-01-31T13:00:39" provcode="LARSE"
provname="LARSEN,KAREN" faccode="RAD1" facname="RAD1"
visit="101629" fee="39.12" paid="0.00" patbal="0.00"
insbal="39.12" totbal="39.12" carrier="" resppartyid="64392"
resppartyname="KHAN,TEA199" dos="01/21/2006"
agingdate="01/31/2006" totalvisitcharge="39.12"
paymentplan="0" void="0" protected="0" seq="20060121101629"
chargeseq="20060121" approvedat="" approvedby=""
isinstitutional="0">

            < paymentlist/>

            < writeofflist/>

        < /charge>

        < charge id="102098" patientid="12345"
patient="KHAN,TEA199" proccode="0010T" b="0" i="1"
createtime="2006-02-21T16:03:46" provcode="HARRIS"
provname="HARRIS,JAMES" faccode="RAD1" facname="RAD1"
visit="101631" fee="10.68" paid="0.00" patbal="0.00"
insbal="10.68" totbal="10.68" carrier="" resppartyid="64392"
resppartyname="KHAN,TEA199" dos="02/02/2006"
agingdate="02/21/2006" totalvisitcharge="206.28"
paymentplan="0" void="0" protected="0" seq="20060202101631"
chargeseq="20060202" approvedat="" approvedby=""
isinstitutional="0">

            < paymentlist/>

            < writeofflist/>

        < /charge>

        < charge id="102101" patientid="12345"
patient="KHAN,TEA199" proccode="00104" b="0" i="1"
createtime="2006-02-21T16:08:54" provcode="HARRIS"
provname="HARRIS,JAMES" faccode="RAD1" facname="RAD1"
visit="101633" fee="117.36" paid="0.00" patbal="10.00"
insbal="107.36" totbal="117.36" carrier="" resppartyid="64392"
resppartyname="KHAN,TEA199" dos="02/21/2006"
agingdate="02/21/2006" totalvisitcharge="117.36"
paymentplan="0" void="0" protected="0" seq="20060221101633"
chargeseq="20060221" approvedat="" approvedby=""
isinstitutional="0">

            < paymentlist/>

            < writeofflist/>

        < /charge>

```

```
< /chargelist>
< unappliedpaymentlist/>
< unappliedwriteofflist/>
</Results>
</PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0"
  },
  "PPMDResults": {
    "@s": "servername",
    "Results": {
      "@itemcount": "5",
      "@pagecount": "1",
      "@page": "1",
      "@itemsfrom": "1",
      "@itemsto": "5",
      "@maxunfilterreddate": "2006-01-21T00:00:00",
      "@oldestcharge": "2006-01-21T00:00:00",
      "@newestcharge": "2006-02-21T00:00:00",
      "@sumpatcharges": "20.00",
      "@suminscharges": "1081.88",
      "@sumpatpayments": "0.00",
      "@suminspayments": "444.44",
      "@sumpatwriteoffs": "0.00",
      "@suminswriteoffs": "255.56",
      "chargelist": {
        "charge": [
          {
            "@id": "102095",
```

```

"@patientid": "12345",
"@patient": "KHAN,TEA199",
"@proccode": "00104",
"@b": "0",
"@i": "1",
"@createtime": "2006-01-31T13:00:39",
"@provcode": "LARSE",
"@provname": "LARSEN,KAREN",
"@faccode": "RAD1",
"@facname": "RAD1",
"@visit": "101629",
"@fee": "39.12",
"@paid": "0.00",
"@patbal": "0.00",
"@insbal": "39.12",
"@totbal": "39.12",
"@carrier": "",
"@resppartyid": "64392",
"@resppartyname": "KHAN,TEA199",
"@dos": "01/21/2006",
"@agingdate": "01/31/2006",
"@totalvisitcharge": "39.12",
"@paymentplan": "0",
"@void": "0",
"@protected": "0",
"@seq": "20060121101629",
"@chargeseq": "20060121",
"@approvedat": "",
"@approvedby": "",
"@isinstitutional": "0",
"paymentlist": null,
"writeofflist": null
},
{

```

```

"@id": "102098",
"@patientid": "12345",
"@patient": "KHAN,TEA199",
"@proccode": "0010T",
"@b": "0",
"@i": "1",
"@createtime": "2006-02-21T16:03:46",
"@provcode": "HARRIS",
"@provname": "HARRIS,JAMES",
"@faccode": "RAD1",
"@facname": "RAD1",
"@visit": "101631",
"@fee": "10.68",
"@paid": "0.00",
"@patbal": "0.00",
"@insbal": "10.68",
"@totbal": "10.68",
"@carrier": "",
"@resppartyid": "64392",
"@resppartyname": "KHAN,TEA199",
"@dos": "02/02/2006",
"@agingdate": "02/21/2006",
"@totalvisitcharge": "206.28",
"@paymentplan": "0",
"@void": "0",
"@protected": "0",
"@seq": "20060202101631",
"@chargeseq": "20060202",
"@approvedat": "",
"@approvedby": "",
"@isinstitutional": "0",
"paymentlist": null,
"writeofflist": null
},

```

```

{
  "@id": "102101",
  "@patientid": "12345",
  "@patient": "KHAN,TEA199",
  "@proccode": "00104",
  "@b": "0",
  "@i": "1",
  "@createtime": "2006-02-21T16:08:54",
  "@provcode": "HARRIS",
  "@provname": "HARRIS,JAMES",
  "@faccode": "RAD1",
  "@facname": "RAD1",
  "@visit": "101633",
  "@fee": "117.36",
  "@paid": "0.00",
  "@patbal": "10.00",
  "@insbal": "107.36",
  "@totbal": "117.36",
  "@carrier": "",
  "@resppartyid": "64392",
  "@resppartyname": "KHAN,TEA199",
  "@dos": "02/21/2006",
  "@agingdate": "02/21/2006",
  "@totalvisitcharge": "117.36",
  "@paymentplan": "0",
  "@void": "0",
  "@protected": "0",
  "@seq": "20060221101633",
  "@chargeseq": "20060221",
  "@approvedat": "",
  "@approvedby": "",
  "@isinstitutional": "0",
  "paymentlist": null,
  "writeofflist": null
}

```

```
        }
      ]
    },
    "unappliedpaymentlist": null,
    "unappliedwriteofflist": null
  }
}
}
```

Get Patient Birthday Reminders

Action: getreminderpatientbirthdays

Retrieves a list of patients with birthdays in the time range specified.

Sample XML:

```
<ppmdmsg action="getreminderpatientbirthdays" class="api"
msgtime="5/21/2006
1:28:12 PM" startdate="1/1/2016" enddate="1/31/2016"
minage="10" maxage="18" />
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "gettxhistory",
    "@class": "demographics",
    "@msgtime": "5/21/2006 1:28:12 PM",
    "@startdate": "1/1/2016",
    "@enddate": "1/31/2016",
    "@minage": "10",
    "@maxage": "18"
  }
}
```

Attributes:

startdate: Patients with birthdays on or after this date.

enddate: Patients with birthdays on or before this date.

minage: Patients that will be this old or older within the "startdate" and "enddate" date range.

maxage: Patients that will be this old or younger within the "startdate" and "enddate" date range.

Results:

The result set will have a list of patients and their date of birth. It will also include some basic patient information.

Sample XML:

```
<?xml version="1.0"?>< PPMDResults s="servername">
  <Results patientcount="1">
    <patientlist>
      <patient id="84763" dob="2000-01-23T00:00:00"
        firstname="JOHN" lastname="DOE" cellphone="" homephone=""
        officephone="" providerprofiledesc=""/>< /patientlist>
    </Results>
  </PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0"
  },
  "PPMDResults": {
    "@s": "servername",
    "Results": {
      "@patientcount": "1",
      "patientlist": {
        "patient": {
          "@id": "84763",
          "@dob": "2000-01-23T00:00:00",
          "@firstname": "JOHN",
          "@lastname": "DOE",
          "@cellphone": "",
```



```
        "@homephone": "",
        "@officephone": "",
        "@providerprofiledesc": ""
    }
}
}
}
```

Add a Responsible Party

Action: addrespparty

Important Note: If you won't pass attribute "billcycle" in request body, it'll be set to the value corresponding to "accttype" parameter (each "accttype" has default values for "billcycle")

Sample XML:

```
<ppmdmsg
  action="addrespparty"
  class="demographics"
  msgtime="5/19/2020 11:10:55 AM"
  patientid="pat66"
  hipaarelationship="G8"
  relationship="4"
>
<respparty
  name="test,able"
  dob="02/19/2020"
  sex="M"
  employer=""
  employstatus=""
  ssn="111-11-1111"
  accttype="4"
  billcycle="25"
  title=""
  sendstmt="1"
  stmtrestart=""
  ispaperless="0"
  stmtformat="PLAIN PAPER"
  billcycle="25"
  fincharge="0">
```

```
<address
  zip="84070"
  city="SANDY"
  state="UT"
  address1=""
  address2="100 hickory"/>
<contactinfo
  homephone=""
  officephone=""
  officeext=""
  otherphone=""
  othertype=""
  preferredcommunicationfid=""
  communicationnote=""
  email=""/>
</respparty>
<familychanges/>
</ppmdmsg>
```

Update Responsible Party

Action: updaterespparty

Method: POST

Endpost: {{Redirect_URL_XLMRPC}}/xmlrpc/processrequest.aspx

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "updaterespparty",
    "@class": "demographics",
    "@msgtime": "3/31/2023 3:23:52 PM",
    "respparty": {
      "@id": "111",
      "address": {
        "@o_zip": "36601",
        "@zip": "98034",
        "@o_city": "MOBILE",
        "@city": "JUANITA",
        "@o_state": "AL",
        "@state": "WA",
        "@o_address1": "",
        "@address1": "APT STE TEST",
        "@o_address2": "11111 MAIN ST",
        "@address2": "ADDRESS TEST"
      },
      },
    "contactinfo": {
      "@communicationnote": "test update",
      "@o_communicationnote": "",
      "@o_homephone": "(334) 555-1602",
      "@homephone": "(334) 555-1600",
      "@o_officephone": "",
      "@officephone": "(334) 555-1601",
    }
  }
}
```

```
        "@o_otherphone": "(334) 555-1602",
        "@otherphone": "(344) 555-1602",
        "@o_email": "",
        "@email": test@email.com
    },
    "@o_sendstmt": "0",
    "@sendstmt": "1",
    "@o_stmtrestart": "",
    "@stmtrestart": "04/19/2023",
    "@o_holdreasonfid": "0",
    "@holdreasonfid": "11"
},
"familychanges": {
    "@homephone": "(334) 555-1600",
    "@address1": "APT STE TEST",
    "@address2": "ADDRESS TEST",
    "@zip": "98034",
    "@city": "JUANITA",
    "@state": "WA"
}
}
}
```

Uploading Files to the Patient Chart Files

Action: uploadfile

Sample XML:

```
<ppmdmsg
  action="uploadfile"
  class="files"
  msgtime="11/12/2019 1:53:11 PM"
>
  <file
    name="Peter"
    description="Peter"
    filetype="I"
    fileext="png"
    visitid=""
    profileid=""
    facilityid=""
    providerid=""
    dos=""
    comments=""
    patientid="pat61722"
    local_file="220px-Peter_Griffin.png"
    referringproviderid=""
    savechanges="true"
    zipmode="0"
  >
    <grouplist>
      <group id="4" code="MISC" name="Miscellaneous">
        <categorylist>
          <category
            id="25"
            filegroupfid="4"
```

```

        code="MIUNSP"
        name="Unspecified"
        filetype="0"
        level="0"
        default="1"
    />
</categorylist>
</group>
</grouplist>
<filecontents>BASE64 </filecontents>
</file>
</ppmdmsg>;

```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "uploadfile",
    "@class": "api",
    "@msgtime": "11/12/2019 1:53:11 PM",
    "file": {
      "@name": "Peter",
      "@description": "Peter",
      "@filetype": "I",
      "@fileext": "png",
      "@visitid": "",
      "@profileid": "",
      "@facilityid": "",
      "@providerid": "",
      "@dos": "",
      "@comments": "",
      "@patientid": "pat61722",

```

```

"@local_file": "220px-Peter_Griffin.png",
"@referringproviderid": "",
"@savechanges": "true",
"@zipmode": "0",
"grouplist": {
  "group": {
    "@id": "4",
    "@code": "MISC",
    "@name": "Miscellaneous",
    "categorylist": {
      "category": {
        "@id": "25",
        "@filegroupfid": "4",
        "@code": "MIUNSP",
        "@name": "Unspecified",
        "@filetype": "0",
        "@level": "0",
        "@default": "1"
      }
    }
  }
},
"filecontents": "BASE64"
}
}

```

Attributes:

Required – name and description (their values cannot be empty)

Result:**Sample XML:**

```
<PPMDResults s="PRDAPI1WFEJ24Y9">
  <Results>
    <filelist>
      <file
        id="18861877"
        name="PETER"
        description="PETER"
        filename="991207-18861877-0000"
        filelocation="2021\05\17\"
        filetype="I"
        fileext="PNG"
        filesize=""
        patientid="61722"
        patientname="TEST,PATIENT"
        patientchartnumber="123456"
        profileid=""
        profilecode=""
        profilename=""
        visitid=""
        facilityid=""
        referringproviderid=""
        referringprovidername=""
        referringprovidercode=""
        dos=""
        createdby="JOE_SWANSON"
        createdat="2021-05-16T13:42:38.207"
        printedby=""
        printedat=""
        reviewedby=""
        reviewedat=""
        approvedby=""
        approvedat=""
```

```

        lockedby=""
        lockedat=""
        changedby="JOE_SWANSON"
        changedat="2021-05-16T13:42:38.253"
        revision="0"
        zipmode="0"
        serverfile="1"
        charttype="Chart"
    >
    <categorylist>
        <category
            id="25"
            code="MIUNSP"
            name="Unspecified"
            groupcode="MISC"
            groupname="Miscellaneous"
            filetype="0"
        />
    </categorylist>
    <revisionlist />
</file>
</filelist>
<updatedlist />
</Results>
</PPMDResults>;

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  }
}

```

```

},
"PPMDResults": {
  "@s": "PRDAPI1WFE8QMCH",
  "Results": {
    "filelist": {
      "file": {
        "@id": "18861878",
        "@name": "PETER",
        "@description": "PETER",
        "@filename": "991207-18861878-0000",
        "@filelocation": "2021\\05\\17\\",
        "@filetype": "I",
        "@fileext": "PNG",
        "@filesize": "",
        "@patientid": "61722",
        "@patientname": "TEST,PATIENT",
        "@patientchartnumber": "123456",
        "@profileid": "",
        "@profilecode": "",
        "@profilename": "",
        "@visitid": "",
        "@facilityid": "",
        "@referringproviderid": "",
        "@referringprovidername": "",
        "@referringprovidercode": "",
        "@dos": "",
        "@createdby": "JOE_SWANSON",
        "@createdat": "2021-05-16T13:43:57.160",
        "@printedby": "",
        "@printedat": "",
        "@reviewedby": "",
        "@reviewedat": "",
        "@approvedby": "",
        "@approvedat": "",

```

```

        "@lockedby": "",
        "@lockedat": "",
        "@changedby": "JOE_SWANSON",
        "@changedat": "2021-05-16T13:43:57.190",
        "@revision": "0",
        "@zipmode": "0",
        "@serverfile": "1",
        "@charttype": "Chart",
        "categorylist": {
            "category": {
                "@id": "25",
                "@code": "MIUNSP",
                "@name": "Unspecified",
                "@groupcode": "MISC",
                "@groupname": "Miscellaneous",
                "@filetype": "0"
            }
        },
        "revisionlist": null
    },
    "updatedlist": null
}

```

Add Insurance Image

Action: uploadfile

Sample XML:

Filecontents – Represents the image encoded in BASE64

```
<ppmdmsg
  action="uploadfile"
  class="api"
  msgtime="5/20/2021 3:11:05 PM"
>
<file
  name="test123"
  description="983-TESBA-20210520"
  filetype="I"
  fileext="png"
  visitid=""
  profileid=""
  facilityid=""
  providerid=""
  dos=""
  comments=""
  patientid="pat5984942"
  local_file="test.png"
  referringproviderid=""
  savechanges="true"
  zipmode="0"
>
<grouplist>
  <group id="3" code="BILLIN" name="Billing">
    <categorylist>
      <category
        id="19"
```

```

        filegroupfid="3"
        code="BININS"
        name="Insurance Cards"
        filetype="1"
        level="0"
        default="0"
    />
</categorylist>
</group>
</grouplist>
<filecontents>***</filecontents>
</file>
</ppmdmsg>;

```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "uploadfile",
    "@class": "api",
    "@msgtime": "5/20/2021 3:11:05 PM",
    "file": {
      "@comments": "",
      "@description": "983-TESBA-20210520",
      "@dos": "",
      "@facilityid": "",
      "@fileext": "png",
      "@filetype": "I",
      "@local_file": "test.png",
      "@name": "test123",
      "@patientid": "pat5984942",
      "@profileid": "",

```

Result:**Sample XML:**

```
<PPMDResults s="PRDAPI1WFEVBVER">
  <Results>
    <filelist>
      <file
        id="18861931"
        name="TEST123"
        description="983-TESBA-20210520"
        filename="991207-18861931-0000"
        filelocation="2021\05\25\"
        filetype="I"
        fileext="PNG"
        filesize=""
        patientid="5984942"
        patientname="APIGEE, TEST"
        patientchartnumber="APIGEE000"
        profileid=""
        profilecode=""
        profilename=""
        visitid=""
        facilityid=""
        referringproviderid=""
        referringprovidername=""
        referringprovidercode=""
        dos=""
        createdby="PPMD_MDONEV"
        createdat="2021-05-24T15:34:54.500"
        printedby=""
        printedat=""
        reviewedby=""
        reviewedat=""
        approvedby=""
        approvedat=""
```

```

        lockedby=""
        lockedat=""
        changedby="PPMD_MDONEV"
        changedat="2021-05-24T15:34:55.063"
        revision="0"
        zipmode="0"
        serverfile="1"
        charttype="Chart"
    >
    <categorylist>
        <category
            id="19"
            code="BININS"
            name="Insurance Cards"
            groupcode="BILLIN"
            groupname="Billing"
            filetype="1"
        />
    </categorylist>
    <revisionlist />
</file>
</filelist>
<updatedlist />
</Results>
</PPMDResults>;

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  }
}

```

```

},
"PPMDResults": {
  "@s": "PRDAPI1WFEVWPLE",
  "Results": {
    "filelist": {
      "file": {
        "@id": "18861932",
        "@name": "TEST123",
        "@description": "983-TESBA-20210520",
        "@filename": "991207-18861932-0000",
        "@filelocation": "2021\\05\\25\\",
        "@filetype": "I",
        "@fileext": "PNG",
        "@filesize": "",
        "@patientid": "5984942",
        "@patientname": "APIGEE,TEST",
        "@patientchartnumber": "APIGEE000",
        "@profileid": "",
        "@profilecode": "",
        "@profilename": "",
        "@visitid": "",
        "@facilityid": "",
        "@referringproviderid": "",
        "@referringprovidername": "",
        "@referringprovidercode": "",
        "@dos": "",
        "@createdby": "PPMD_MDONEV",
        "@createdat": "2021-05-24T15:20:19.813",
        "@printedby": "",
        "@printedat": "",
        "@reviewedby": "",
        "@reviewedat": "",
        "@approvedby": "",
        "@approvedat": "",

```

```

        "@lockedby": "",
        "@lockedat": "",
        "@changedby": "PPMD_MDONEV",
        "@changedat": "2021-05-24T15:20:21.097",
        "@revision": "0",
        "@zipmode": "0",
        "@serverfile": "1",
        "@charttype": "Chart",
        "categorylist": {
            "category": {
                "@id": "19",
                "@code": "BININS",
                "@name": "Insurance Cards",
                "@groupcode": "BILLIN",
                "@groupname": "Billing",
                "@filetype": "1"
            }
        },
        "revisionlist": null
    },
    "updatedlist": null
}

```

Get Episodes

Use this call to retrieve a list of episodes for the patient.

Method: POST

Endpoint: {{Redirect_URL_XLMRPC}}/xmlrpc/processrequest.aspx

Example JSON:

```
{
  "ppmdmsg": {
    "@action": "getepisodes",
    "@class": "demographics",
    "@msgtime": "9/1/2023 2:04:24 PM",
    "@patientid": "244056",
    "@nocookie": "0"
  }
}
```

Update and Get Patient Consent Status

Update Patient Consent Status

<https://wc-api-801.advancedmd.com/api/patient/consents/109259?licensekey=991024>

Request Method: PATCH

```
{id: 3, status: 1}
id:3
status:1
```

id= record number

Status 0= Decline

Status 1= Given

Get All Consents

<https://wc-api-801.advancedmd.com/api/patient/consents/109259?licensekey=991024>

Request Method: GET

Get Patient Preferences

Method: GET

Endpoint: {{Redirect_URL_REST_
PM}}/demographic/patientpreferences?patientId=111

Body: Empty

Example Response:

```
{
  "sendnotificationemail": false,
  "sendcampaignmessagetext": false,
  "sendcampaignmessageemail": false,
  "sendnotificationtext": false,
  "sendotheremail": false,
  "sendothertext": false,
  "sendsurveymessagetext": true,
  "sendsurveymessageemail": true,
  "sendapptremindertoresponsibleparty": false,
  "responsiblepartyname": "AAGARD,JOHN",
  "timezoneid": 2,
  "practicetimezoneid": 5,
  "defaulttimezoneabbreviation": "EST",
  "responsibleparty": {
    "responsiblepartyid": 111,
    "sendonlinestatementtext": true,
    "sendonlinestatementemail": true,
    "patientid": 111,
    "firstname": "JOHN",
    "lastname": "AAGARD",
    "title": "MR",
    "fullname": "AAGARD,JOHN",
    "sendapptreminderemail": true,
```

```

        "sendapptremindertext": true,
        "sendapptremindercall": true,
        "cellphone": "251-555-8888",
        "preferredphone": "",
        "email": JAAGARD@ABCCONST.COM,
        "emailverificationstatus": 2,
        "language": 44
    },
    "timezones": [
        {
            "timezoneid": 1,
            "windowstimezonename": "Alaskan Standard Time",
            "displayname": "(UTC-09:00) Alaska",
            "abbreviation": "AKST"
        },
        {
            "timezoneid": 2,
            "windowstimezonename": "Atlantic Standard Time",
            "displayname": "(UTC-04:00) Atlantic Time
(Canada)",
            "abbreviation": "AST"
        },
        {
            "timezoneid": 3,
            "windowstimezonename": "Hawaiian Standard Time",
            "displayname": "(UTC-10:00) Hawaii",
            "abbreviation": "HST"
        },
        {
            "timezoneid": 4,
            "windowstimezonename": "Pacific Standard Time",
            "displayname": "(UTC-08:00) Pacific Time (US &
Canada)",
            "abbreviation": "PST"
        }
    ]
}

```

```

    },
    {
      "timezoneid": 5,
      "windowstimezonename": "Mountain Standard Time",
      "displayname": "(UTC-07:00) Mountain Time (US &
Canada)",
      "abbreviation": "MST"
    },
    {
      "timezoneid": 6,
      "windowstimezonename": "Central Standard Time",
      "displayname": "(UTC-06:00) Central Time (US &
Canada)",
      "abbreviation": "CST"
    },
    {
      "timezoneid": 7,
      "windowstimezonename": "Eastern Standard Time",
      "displayname": "(UTC-05:00) Eastern Time (US &
Canada)",
      "abbreviation": "EST"
    },
    {
      "timezoneid": 8,
      "windowstimezonename": "US Mountain Standard
Time",
      "displayname": "(UTC-07:00) Arizona",
      "abbreviation": "US MST"
    },
    {
      "timezoneid": 9,
      "windowstimezonename": "West Pacific Standard
Time",
      "displayname": "(UTC+10:00) Guam, Port Moresby",
      "abbreviation": "CHST"
    }
  ]
}

```

```
    }  
  ],  
  "patientid": 111,  
  "firstname": "JOHN",  
  "lastname": "AAGARD",  
  "title": "MR",  
  "fullname": "AAGARD,JOHN",  
  "sendapptreminderemail": false,  
  "sendapptremindertext": false,  
  "sendapptremindercall": true,  
  "cellphone": "251-555-8888",  
  "preferredphone": "251-555-8888",  
  "email": JAAGARD@ABCCONST.COM,  
  "emailverificationstatus": 2,  
  "language": 44  
}
```

Update Patient Preferences

Method: PUT

Endpoint: {{Redirect_URL_REST_PM}}/demographic/patientpreferences?patientid=111

Body Example:

```
{
  "sendnotificationemail": false,
  "sendcampaignmessagetext": false,
  "sendcampaignmessageemail": false,
  "sendnotificationtext": false,
  "sendotheremail": false,
  "sendothertext": false,
  "sendsurveymessagetext": true,
  "sendsurveymessageemail": true,
  "sendapptremindertoresponsibleparty": false,
  "responsiblepartyname": "AAGARD,JOHN",
  "timezoneid": 2,
  "practicetimezoneid": 5,
  "defaulttimezoneabbreviation": "EST",
  "responsibleparty": {
    "responsiblepartyid": 111,
    "sendonlinestatementtext": true,
    "sendonlinestatementemail": true,
    "patientid": 111,
    "firstname": "JOHN",
    "lastname": "AAGARD",
    "title": "MR",
    "fullname": "AAGARD,JOHN",
    "sendapptreminderemail": true,
    "sendapptremindertext": true,
    "sendapptremindercall": true,
  }
}
```

```

        "cellphone": "251-555-8888",
        "preferredphone": "",
        "email": JAAGARD@ABCCONST.COM,
        "emailverificationstatus": 2,
        "language": 44
    },
    "timezones": [
        {
            "timezoneid": 1,
            "windowstimezonename": "Alaskan Standard Time",
            "displayname": "(UTC-09:00) Alaska",
            "abbreviation": "AKST"
        },
        {
            "timezoneid": 2,
            "windowstimezonename": "Atlantic Standard Time",
            "displayname": "(UTC-04:00) Atlantic Time
(Canada)",
            "abbreviation": "AST"
        },
        {
            "timezoneid": 3,
            "windowstimezonename": "Hawaiian Standard Time",
            "displayname": "(UTC-10:00) Hawaii",
            "abbreviation": "HST"
        },
        {
            "timezoneid": 4,
            "windowstimezonename": "Pacific Standard Time",
            "displayname": "(UTC-08:00) Pacific Time (US &
Canada)",
            "abbreviation": "PST"
        },
        {

```

```

        "timezoneid": 5,
        "windowstimezonename": "Mountain Standard Time",
        "displayname": "(UTC-07:00) Mountain Time (US &
Canada)",
        "abbreviation": "MST"
    },
    {
        "timezoneid": 6,
        "windowstimezonename": "Central Standard Time",
        "displayname": "(UTC-06:00) Central Time (US &
Canada)",
        "abbreviation": "CST"
    },
    {
        "timezoneid": 7,
        "windowstimezonename": "Eastern Standard Time",
        "displayname": "(UTC-05:00) Eastern Time (US &
Canada)",
        "abbreviation": "EST"
    },
    {
        "timezoneid": 8,
        "windowstimezonename": "US Mountain Standard
Time",
        "displayname": "(UTC-07:00) Arizona",
        "abbreviation": "US MST"
    },
    {
        "timezoneid": 9,
        "windowstimezonename": "West Pacific Standard
Time",
        "displayname": "(UTC+10:00) Guam, Port Moresby",
        "abbreviation": "CHST"
    }
],

```

```
"patientid": 111,  
"firstname": "JOHN",  
"lastname": "AAGARD",  
"title": "MR",  
"fullname": "AAGARD,JOHN",  
"sendapptreminderemail": false,  
"sendapptremindertext": false,  
"sendapptremindercall": true,  
"cellphone": "251-555-8888",  
"preferredphone": "251-555-8888",  
"email": JAAGARD@ABCCONST.COM,  
"emailverificationstatus": 2,  
"language": 44  
}
```

Important Note: The body needs to be fetched from the **GetPatientPreferences** response. Only change the values that need to be updated like **timezoneid** for **patienttimezone**. Do not delete any other field.

Get Race and Ethnicity Lists

This call will return the list of races/ethnicities available for the patient.

URL: {{Redirection method}}/TEMP/xmlrpc/processrequest.aspx

Method: POST

Body:

```
{
  "ppmdmsg": {
    "@action": "getraceethnicitylists",
    "@class": "demographics",
    "@msgtime": "6/17/2024 9:33:20 AM"
  }
}
```

Example Response

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-544f9558df-
w96zk" lst="06/17/2024 08:36:45">
  <Results>
    <racelist>
      <race id="241" name="Declined to Specify"/>
      <race id="701" name="Abenaki"/>
      <race id="702" name="Absentee Shawnee"/>
    </racelist>
    <ethnicitylist>
      <ethnicity id="224" name="Declined to Specify"/>
      <ethnicity id="601" name="Andalusian"/>
      <ethnicity id="602" name="Argentinean"/>
    </ethnicitylist>
  </Results>
```

</PPMResults>

Get Responsible Party Details

Action: getrespparty

Example JSON:

```
{
  "ppmdmsg": {
    "@action": "getrespparty",
    "@class": "demographics",
    "@msgtime": "3/26/2025 11:58:56 AM",
    "@resppartyid": "6886251"
  }
}
```

Example Response:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-4-7dd8f6f8b5-
gd121" lst="03/26/2025 10:59:27">
  <Results>
    <resppartylist>
      <respparty id="resp6886251" name="KONSTANTIN,TEST"
acctype="ac_type4" acctnum="6886251" dob="12/04/1984" sex="U"
title="II" prefix="MR" suffix="II" employer="IBM, INC."
employstatus="1" ssn="XXX-XX-2221" sendstmt="1" stmtrestart=""
holdreasonfid="0" holdreasondesc="" holdreasoncode=""
billcycle="25" fincharge="0" stmtformat="" balancefwd="1"
lastpmtdate="12/02/2024" lastpmtamount="55.00"
laststmtdate="03/28/2024" laststmtamount="50.00"
paymentplanbalance="" ispaperless="0"
ispaperlessportalchangedate="">
        <address zip="32164" city="PALM COAST"
state="FL" address1="907" address2="60 PICKY DRIVE"
areacode="386" countrycode="" />
        <contactinfo name="" homephone="(801) 505-
9065" officephone="(386) 555-6655" officeext="" otherphone="
(386) 627-5963" othertype="0"
email="KONSTANTIN.GRITSAEV@ADVANCEDMD.COM"
preferredcommunicationfid="3" communicationnote="Note goes
here" />
    
```



```

        <creditcardonfile />
        <arbucketlist>
            <arbucket buckettype="r" current="0.00"
past30="40.00" past60="54.68" past90="60.00" past120="779.20"
unapplied="949.00" total="-15.12" />
            <arbucket buckettype="ri" current="0.00"
past30="160.00" past60="355.32" past90="140.00"
past120="7733.60" unapplied="11.00" total="8377.92" />
        </arbucketlist>
        <familymemberlist>
            <familymember id="family6018389"
name="KONSTANTIN,TEST" chart="13" isrp="1"
previousfirstname="" previousmiddlename="" previouslastname=""
hipparelationship="18">
                <contactinfo homephone="(801) 505-
9065" />
                <address zip="32164" city="PALM COAST"
state="FL" address1="907" address2="60 PICKY DRIVE"
countrycode="" />
                <previousaddress address1="907"
address2="60 PICKY DRIVE" countrycode="" state="FL" city="PALM
COAST" zip="32164" />
            </familymember>
            <familymember id="family6062518"
name="RESP,TEST" chart="57" isrp="0" previousfirstname=""
previousmiddlename="" previouslastname=""
hipparelationship="33">
                <contactinfo homephone="" />
                <address zip="32164" city="PALM COAST"
state="FL" address1="907" address2="60 PICKY DRIVE"
countrycode="" />
                <previousaddress address1="907"
address2="60 PICKY DRIVE" countrycode="" state="FL" city="PALM
COAST" zip="32164" />
            </familymember>
        </familymemberlist>
    </respparty>
</resppartylist>
<accttypelist>
    <accttype id="ac_type4" name="TYPICAL ACCOUNT"
code="TA" />

```

```
        </accttypelist>
    </Results>
    <Error />
</PPMDResults>
```

Patient Portal Requests

Patient Portal Account

Look Up Patient Portal Account

Example JSON:

```
{
  "ppmdmsg": {
    "@action": "lookuppatientportalaccount",
    "@class": "lookup",
    "@msgtime": "9/13/2024 8:49:35 AM",
    "@exactmatch": "1",
    "@fullname": "PATIENT,PORTAL",
    "@orderby": "fullname",
    "@page": "1"
  }
}
```

Example Response:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-5dff5cf5cd-
sgkxj" lst="09/13/2024 07:58:20">
  <Results>
    <patientportalaccountlist>
      <patientportalaccount id="6484"
emailaddress="nonename@gmail.com" fullname="PATIENT,PORTAL" />
    </patientportalaccountlist>
  </Results>
</PPMDResults>
```

Save Patient Portal Account

Example JSON:

```

{
  "ppmdmsg": {
    "patientportalaccount": {
      "authorizedpatientlist": {
        "authorizedpatient": {
          "@id": "6062332",
          "@name": "TEST,PORTAL",
          "@expirationdate": "09/13/2039",
          "@comment": "",
          "@expired": "0",
          "@dob": "01/01/2001",
          "@chartnumber": "53",
          "@changeable": "1"
        }
      },
      "@emailaddress": "SOMEEMAIL@GMAIL.COM",
      "@fullname": "TEST,PORTAL",
      "@comment": "Testing portal",
      "@disable": "0",
      "@display": "1",
      "@responsiblepartyid": "6931592"
    },
    "@action": "saveaccount",
    "@class": "patientportal",
    "@msgtime": "9/13/2024 8:47:25 AM"
  }
}

```

Example Response:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="UATAPI2WFELK60Q" lst="9/13/2024 8:04:45 AM">
  <Results>

```

```

        <patientportalaccount id="6485"
emailaddress="SOMEEMAIL@GMAIL.COM" fullname="TEST,PORTAL"
display="1" comment="Testing portal" disable="0"
invitationstatus="notsent" invitationdate=""
enrollmentstatus="notenrolled" lastlogindate="">

        <respparty id="6931592" name="TEST,PORTAL"
hasselfpatient="1" hasfamily="0" />

        <authorizedpatientlist>

                <authorizedpatient id="6062332"
name="TEST,PORTAL" dob="01/01/2001" ssn="XXX-XX-3355"
comment="" chartnumber="53" changeable="1"
expirationdate="09/13/2039" expired="0" />

        </authorizedpatientlist>

        </patientportalaccount>

</Results>
</PPMDResults>

```

Send Invite to Patient Portal

Example JSON:

```

{
  "ppmdmsg": {
    "@action": "sendinvitation",
    "@class": "portal",
    "@msgtime": "9/13/2024 8:47:25 AM",
    "@applicationid": "1",
    "@emailaddress": "nonename@gmail.com",
    "@fullname": "PATIENT,PORTAL",
    "@comment": "",
    "@portalid": "6485"
  }
}

```

Example Response:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-5dff5cf5cd-
sgkxj" lst="09/13/2024 08:05:37">
  <Results invitationdate="09/13/2024 08:05:37 AM"
practicename="API SANDBOX KEY" messagetype="516"></Results>
</PPMDResults>
```

Get List of Patient Portal Accounts

Action: getfamilymembers

Sample XML:

```
<ppmdmsg action="getfamilymembers"
  class="api"
  msgtime="5/24/2021 1:34:16 PM"
  responsiblepartyid="6850766"
  overridesystemdefault="0"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getfamilymembers",
    "@class": "api",
    "@msgtime": "5/24/2021 1:34:16 PM",
    "@responsiblepartyid": "6850766",
    "@overridesystemdefault": "0",
    "@self-closing": "true"
  }
}
```

Attributes

- **Required** – action, class
- **Additionally** – define @responsiblepartyid attribute to define Id for correct search (in case of null you get an empty response)

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFECSSFR">
  <Results hasselfpatient="1" hasfamily="0" name="API,TEST"
email="SS.AMD.API@EMAIL.COM">
    <authorizedpatientlist />
  </Results>
</PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFEJ24Y9",
    "Results": {
      "@hasselfpatient": "1",
      "@hasfamily": "0",
      "@name": "API,TEST",
      "@email": "SS.AMD.API@EMAIL.COM",
      "authorizedpatientlist": null
    }
  }
}
```

}

Send Patient Portal Account Invite

Action: sendinvitation

Sample XML:

```
<ppmdmsg
  action="sendinvitation"
  class="api"
  msgtime="5/21/2021 1:31:55 PM"
  applicationid="1"
  emailaddress="SS.AMD.APIGEE@GMAIL.COM"
  fullname="APIGEE,TEST"
  comment=""
  portalid="6416"
/>;
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "sendinvitation",
    "@class": "api",
    "@msgtime": "4/1/2021 2:16:55 PM",
    "@applicationid": "1",
    "@emailaddress": "SS.AMD.APIGEE@GMAIL.COM",
    "@fullname": "APIGEE,TEST",
    "@comment": "",
    "@portalid": "6416"
  }
}
```

Attributes:

- Required – action, class, portalid, applicationid
- portalid – The portal ID of the patient portal account. Generally, this will have been returned by a "lookuppatientportalaccount" request.
- applicationid – TBD (default value "1")

Results: The invitation mail to join the Patient Portal will be sent to the email.

Sample XML:

```
<PPMResults s="PRDAPI1WFERCHNR">
  <Results invitationdate="05/24/2021 04:24:27 AM"
    practicename="Janssen Diagnostics Inc"></Results>
</PPMResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMResults": {
    "@s": "PRDAPI1WFEVWPLE",
    "Results": {
      "@invitationdate": "05/24/2021 04:28:17 AM",
      "@practicename": "Janssen Diagnostics Inc"
    }
  }
}
```

Get Patient Portal Account

Action: getaccount

Sample XML:

```
<ppmdmsg
  action="getaccount"
  class="api"
  msgtime="5/25/2021 2:40:31 PM"
  portalid="6414"
/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getaccount",
    "@class": "api",
    "@msgtime": "5/25/2021 2:40:31 PM",
    "@portalid": "6414",
    "@self-closing": "true"
  }
}
```

Attributes

- Required – action, class, portalid (in case it does not exist, empty response comes)
- Additionally – @portalid must be integer

Sample XML:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFEYP3NE">
  <Results>
    <patientportalaccount
      id="6414"
      emailaddress="johnsmith@email.com"
      fullname="JOHN,SMITH"
      display="1"
      comment=""
      disable="0"
      invitationstatus=""
      invitationdate="05/21/2021 02:52:03 AM"
      enrollmentstatus="enrolled"
      lastlogindate="05/20/2021 01:22:15 AM"
    >
      <respparty
        id="6850572"
        name="JOHN,SMITH"
        hasselfpatient="1"
        hasfamily="0"
      />
    <authorizedpatientlist>
      <authorizedpatient
        id="5984750"
        name="JOHN,SMITH"
        dob="05/14/1993"
        comment=""
        chartnumber="34441243"
        changeable="1"
        expirationdate=""
        expired="0"
      />
    </authorizedpatientlist>
  </patientportalaccount>

```

```
</Results>
</PPMDResults>;
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFEVWPLE",
    "Results": {
      "patientportalaccount": {
        "@id": "6414",
        "@emailaddress": "johnsmith@email.com",
        "@fullname": "JOHN,SMITH",
        "@display": "1",
        "@comment": "",
        "@disable": "0",
        "@invitationstatus": "",
        "@invitationdate": "05/21/2021 02:52:03 AM",
        "@enrollmentstatus": "enrolled",
        "@lastlogindate": "05/20/2021 01:22:15 AM",
        "respparty": {
          "@id": "6850572",
          "@name": "JOHN,SMITH",
          "@hasselfpatient": "1",
          "@hasfamily": "0"
        },
      },
      "authorizedpatientlist": {
        "authorizedpatient": {
          "@id": "5984750",
```

```
        "@name": "JOHN,SMITH",
        "@dob": "05/14/1993",
        "@comment": "",
        "@chartnumber": "34441243",
        "@changeable": "1",
        "@expirationdate": "",
        "@expired": "0"
    }
}
}
}
}
```

Save Patient Portal Account

Action: saveaccount

Sample XML:

```
<ppmdmsg
  action="saveaccount"
  class="api"
  msgtime="5/26/2021 5:42:12 PM">
  <patientportalaccount
    emailaddress="JOHNSMITH@MAIL.COM"
    fullname="JOHN,SMITH"
    comment=""
    disable="0"
    display="1"
    responsiblepartyid="6850790">
    <authorizedpatientlist>
      <authorizedpatient
        id="5984966"
        name="JOHN,SMITH"
        dob="05/27/2000"
        hipaarelationship="SELF"
        comment=""
        chartnumber="APIAPI112"
        changeable="1"
        expirationdate=""
        expired="0"/>
      </authorizedpatientlist>
    </patientportalaccount>ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg":{
```

```

"@action":"saveaccount",
"@class":"api",
"@msgtime":"5/25/2021 3:41:31 PM",
"patientportalaccount":{
  "@emailaddress":"NOTDUPLICATED2@MAIL.COM ",
  "@fullname":"YURII,APIGEE",
  "@comment":"",
  "@disable":"0",
  "@display":"1",
  "@responsiblepartyid":"6850788",
  "authorizedpatientlist":{
    "authorizedpatient":{
      "@id":"5984964",
      "@name":"YURII,APIGEE",
      "@dob":"05/06/1979",
      "@hipaarelationship":"SELF",
      "@comment":"",
      "@chartnumber":"YAPIGEE123",
      "@changeable":"1",
      "@expirationdate":"",
      "@expired":"0",
      "@self-closing":"true"
    }
  }
}
}
}
}

```

Attributes

- Required – action, class, emailaddress, fullname, comment, disable, display
- Additional notes:
 - @emailaddress – if this email is already signed to the particular patient, an error will occur
 - @fullname – of patient portal account
 - @comment – if not needed, just leave as empty "@comment":""
 - @disable – should be integer (default value: 0)
 - @display – visibility flag

Results:

This request returns a <patientportalaccount> element or object. It could include a <authorizedpatientlist> which contains a list of <authorizedpatient>.

Sample XML:

```
<PPMDResults s="PRDAPI1WFEVWPLE">
  <Results>
    <patientportalaccount
      id="6474"
      emailaddress="JOHNSMITH@EMAIL.COM"
      fullname="JOHN,SMITH"
      display="1"
      comment=""
      disable="0"
      invitationstatus="notsent"
      invitationdate=""
      enrollmentstatus="notenrolled"
```

```

        lastlogindate=""
    >
    <respparty
        id="6850790"
        name="JOHN,SMITH"
        hasselfpatient="1"
        hasfamily="0"
    />
    <authorizedpatientlist>
        <authorizedpatient
            id="5984966"
            name="JOHN,SMITH"
            dob="05/27/2000"
            comment=""
            chartnumber="APIAPI112"
            changeable="1"
            expirationdate=""
            expired="0"
        />
    </authorizedpatientlist>
</patientportalaccount>
</Results>
</PPMDResults>;

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFEVBVER",

```

```

"Results": {
  "patientportalaccount": {
    "@id": "6473",
    "@emailaddress": "JOHNSMITH@EMAIL.COM",
    "@fullname": "JOHN,SMITH",
    "@display": "1",
    "@comment": "",
    "@disable": "0",
    "@invitationstatus": "notsent",
    "@invitationdate": "",
    "@enrollmentstatus": "notenrolled",
    "@lastlogindate": "",
    "respparty": {
      "@id": "6850790",
      "@name": "JOHN,SMITH",
      "@hasselfpatient": "1",
      "@hasfamily": "0"
    },
    "authorizedpatientlist": {
      "authorizedpatient": {
        "@id": "5984966",
        "@name": "JOHN,SMITH",
        "@dob": "05/27/2000",
        "@comment": "",
        "@chartnumber": "APIAPI112",
        "@changeable": "1",
        "@expirationdate": "",
        "@expired": "0"
      }
    }
  }
}

```

Get Responsible Party Self

Action: getresponsiblepartyself

Sample XML:

```
<ppmdmsg
  action="getresponsiblepartyself"
  class="patientportal"
  msgtime="5/20/2021 12:31:45 PM"
  responsiblepartyid="6850572"
/>
```

Sample JSON:

```
{
  "ppmdmsg":{
    "@action":"getresponsiblepartyself",
    "@class":"api",
    "@msgtime":"5/25/2021 3:41:31 PM",
    "@responsiblepartyid":"6850766",
  }
}
```

Attributes:

- Required – action, class, responsiblepartyid;
- Optional – msgtime, la, lac, lat, let, lst, ltq;

Results:

This request returns an object <authorizedpatientlist> which contains a list of <authorizedpatient>.

Sample of successful response XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFERCHNR">
  <Results>
    <authorizedpatientlist>
      <authorizedpatient
        id="5984750"
        name="JOHN,SMITH"
        dob="05/14/1993"
        hipaarelationship="SELF"
        comment=""
        chartnumber="34441243"
        changeable="1"
        expirationdate=""
        expired="0"
      />
    </authorizedpatientlist>
  </Results>
</PPMDResults>;
```

Sample of successful response JSON:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFERXSV6",
```

```
"Results": {  
  "authorizedpatientlist": {  
    "authorizedpatient": {  
      "@id": "5984750",  
      "@name": "JOHN,SMITH",  
      "@dob": "05/14/1993",  
      "@hipaarelationship": "SELF",  
      "@comment": "",  
      "@chartnumber": "34441243",  
      "@changeable": "1",  
      "@expirationdate": "",  
      "@expired": "0"  
    }  
  }  
}  
}
```

Scheduler Actions

Book Appointment

This is REST API.

Request

- Verb – POST
- Basepath – /API
- Pathsuffix – /scheduler/Appointments

URL: {{webserverbaseurl from login call}}/{{Host}}/
{{AppName}}/scheduler/Appointments

Example : https://providerapi.advancedmd.com/api/api-101/
{{YourAppName}}/scheduler/Appointments

Creates a new AdvancedMD.API.Scheduler.Models.Appointment and returns the newly created AdvancedMD.API.Scheduler.Models.Appointment back to the caller.

Sample:

```
{
  "patientid": 5984942,
  "columnid": 16,
  "startdatetime": "2021-06-09T13:30",
  "clientdatetime": "2021-06-04T12:53",
  "duration": 15,
  "color": "Blue",
  "profileid": 141,
  "type": [
    {
      "id": 19,
      "name": "NP - NEW PATIENT",
```

```

"isdefault": true,
"billable": true,
"transitionofcare": true,
"istelemedicine": false,
"display": true,
"isgroupappt": false,
"settings": [
  {
    "id": 15,
    "profileid": null,
    "chargesliptemplateid": null,
    "duration": 30,
    "color": "GREEN",
    "hide": false,
    "priority": "Low",
    "groupapptmaxpat": null,
    "instructions": [
      8,
      10,
      11
    ]
  }
],
"$selected": false,
"$settings": {
  "id": 15,
  "profileid": null,
  "chargesliptemplateid": null,
  "duration": 30,
  "color": "GREEN",
  "hide": false,
  "priority": "Low",
  "groupapptmaxpat": null,
  "instructions": [

```

```

            8,
            10,
            11
        ]
    }
}
],
"episodeid": 5949667,
"instruction": [
    {
        "id": 8,
        "name": "INS",
        "instruction": "PLEASE BRING YOUR INSURANCE CARD
(S)",
        "display": true,
        "selected": false
    },
    {
        "id": 10,
        "name": "EARLY",
        "instruction": "PLEASE ARRIVE AT LEAST 15 MINUTES
BEFORE YOUR SCHEDULED APPOINTMENT, TO FILL OUT PAPERWORK.",
        "display": true,
        "selected": false
    },
    {
        "id": 11,
        "name": "RECORDS",
        "instruction": "IF THIS IS YOUR FIRST VISIT,
PLEASE BRING OLD RECORDS FROM YOUR PREVIOUS DOCTOR IF
AVAILABLE.",
        "display": true,
        "selected": false
    }
],
"transitionofcare": true,

```

```
    "tocrequestedavailable": null,  
    "istelemedicine": false,  
    "iswaitlist": false,  
    "facilityid": 234,  
    "referralplanid": 6895963  
  }
```

Attributes

Required:

- patientid – the identifier for the patient; (\$int32)
- columnid – The id of the column to create the appointment for; (\$int32)
- startdatetime – the date and time that this appointment is for. (\$date-time)
- duration – the duration, in minutes, of the appointment; (\$int32)
- profileid – the identifier for the profile; (\$int32)
- type [{ id }] – the appointment type id; (type – Array of Objects; id - \$int32)

Results

This API will return the following HTTP responses:

- 201 – New appointment(s) created and 'Location' header(s) pointing to the new resource(s).
- 400 – The message posted to the end point was not understood.

- 403 – The user is not authorized to make this request.
- 409 – Response if there are any conflicts encountered while creating the appointment.

***Note:** When you receive a 409 response, there will be a `!:ConflictResponse` in the content of the response which gives the error code and description of the error code for the conflict.*

- 4101 – Can't add appointment: Overlaps existing appointment.
- 4112 – The new record conflicted with a previously deleted record.
- 4117 – Appointment is outside of column.
- 4126 – The provider specified is inactive.
- 4135 – Provider is limited user, has too many visits.
- 4136 – Provider is limited user, has too many visits (warning) [Disabled for now].
- 4155 – Appointment is outside schedule work times.
- 4185 – Appointment is being schedule over a block and the user does not have permission.
- 4186 – Appointment will create more appointments than the max allowed for a time slot.

Sample of Successful Response:

```
{
  "id": 9545560,
  "startdatetime": "2021-06-09T13:30:00",
  "status": 0,
```

```

"confirmdate": null,
"columnid": 16,
"heading": "Miller East",
"profileid": 141,
"provider": "TEST PROVIDER",
"providercode": "TEST ",
"facilityid": 234,
"facility": "TEST FACILITY",
"facilitycode": "TEST ",
"episodeid": 5949667,
"episode": "STANDARD",
"patientid": 5984942,
"firstname": "TEST",
"lastname": "APIGEE",
"middlename": "",
"ssn": "111111111",
"dob": "1995-05-18T00:00:00",
"patientemail": "SS.AMD.APIGEE@GMAIL.COM",
"patientinactivestatusid": null,
"ispatientapproved": true,
"chartnumber": "APIGEE000",
"deceased": null,
"gender": "U",
"patientaddress": {
  "address1": "",
  "address2": "",
  "city": "MINNESOTA CITY",
  "state": "MN",
  "zipcode": "55959",
  "countrycode": ""
},
"responsiblepartyid": 6850766,
"hasccof": false,
"rpname": "APIGEE,TEST",

```

```

"copay": null,
"paymentid": null,
"coverageid": null,
"carriername": "",
"carriercode": "",
"waitlist": null,
"recurringappointmentid": null,
"recurringappointment": null,
"hasrecurrenceexception": false,
"recurrenceexception": null,
"transitionofcare": true,
"tocrequestedavailable": null,
"istelemedicine": false,
"duration": 30,
"color": "GREEN",
"comments": "",
"referralplanid": 6895963,
"authorizations": [
    24392
],
"referringprovider": {
    "id": 6193,
    "code": "TEST2 ",
    "name": "TEST,PROVIDER2"
},
"visitposted": false,
"chargesposted": false,
"homephone": " ",
"officephone": " ",
"officeextension": " ",
"otherphone": " ",
"otherphonetype": " ",
"preferredphone": "",
"appointmenttypeids": [

```

```

19
],
"appointmenttype": [
  {
    "licensekey": 991207,
    "id": 19,
    "name": "NP - NEW PATIENT",
    "isdefault": true,
    "display": true,
    "billable": true,
    "transitionofcare": true
  }
],
"appointmentinstruction": [
  {
    "licensekey": 991207,
    "id": 8,
    "name": "INS      ",
    "instruction": "PLEASE BRING YOUR INSURANCE CARD(S)",
    "documentid": null,
    "display": true
  },
  {
    "licensekey": 991207,
    "id": 10,
    "name": "EARLY      ",
    "instruction": "PLEASE ARRIVE AT LEAST 15 MINUTES BEFORE
YOUR SCHEDULED APPOINTMENT, TO FILL OUT PAPERWORK.",
    "documentid": null,
    "display": true
  },
  {
    "licensekey": 991207,
    "id": 11,

```

```
    "name": "RECORDS  ",
    "instruction": "IF THIS IS YOUR FIRST VISIT, PLEASE
BRING OLD RECORDS FROM YOUR PREVIOUS DOCTOR IF AVAILABLE.",
    "documentid": null,
    "display": true
  }
],
"sequence": "",
"globalperiod": [],
"insuranceorder": "",
"insurance": [],
"arpatientbalance": 0,
"arfamilybalance": 0,
"remainingvisits": null,
"maxauthvisits": null,
"authvisitsused": null,
"appointmentgroupid": null,
"superbill": null,
"linkednotestatus": 0
}
```

Auto Assign Forms to Appointment

Use this API call when there are patient forms assigned to Appointment Types.

JSON Example:

```
{
  "ppmdmsg": {
    "@action": "autoassignforms",
    "@class": "patientforms",
    "@appointmentid": "9637646",
    "@patientid": "6018389",
    "@types": "13",
    "@v": "1"
  }
}
```

Confirm Appointment Not Booked

Action: update

Sample of XML Request:

```
<ppmdmsg
  action="update"
  class="api"
  msgtime="6/4/2021 1:23:57 PM"
  view="confirm"
  mode="confirm"
>
  <ppmd:appt xmlns:ppmd="www.perfectpractice.md"
  id="appt9545597">
    <span style="white-space: nowrap">APIGEE,TEST</span>
  </ppmd:appt>
</ppmdmsg>;
```

Sample of JSON Request:

```
{
  "ppmdmsg":{
    "@class":"scheduler",
    "@action":"update",
    "@view":"confirm",
    "ppmd:appt":{
      "@id":"appt9545655",
      "@xmlns:ppmd": "www.perfectpractice.md",
      "span":{
        "@style":"white-space: nowrap",
        "#text":"APIGEE,TEST"
      }
    },
    "@mode":"confirm",
```

```
        "@msgtime":"6\4\2021 1:23:57 PM"
    }
}
```

Attributes

Id – Mandatory field. Represent the appointment id.

Results

Sample of XML Response:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFECJPSW">
  <Results xmlns:ppmd="www.perfectpractice.md">
    <ppmd:apptlist>
      <ppmd:appt
        id="appt9545597"
        date="06/11/2021"
        time="09:15"
        column="col16"
        patient="pat5984942"
        resppartyname="APIGEE,TEST"
        copay="100%"
        copayid=""
        insplan=""
        seq=""
        carriername=""
        carriercode=""
        waitlistid=""
```

```

profile="prof141"
facility="fac234"
respparty="resp6850766"
hasconfile="0"
status="0"
checkintime=""
othertime=""
checkouttime=""
comments=""
homephone=""
officephone=""
confuser="PPMD_MDONEV"
confdate="06/14/2021 01:14P"
confmeth=""
dateofbirth="05/18/1995"
gender="UNKNOWN"
typetext="NP - NEW PATIENT"
instrstext="INS; EARLY; RECORDS"
eligibilityid=""
eligibilitycarrierid=""
eligibilitystatusid=""
eligibilityrespondedate=""
eligibilitycreatedat=""
eligibilityvalidation=""
eligibilityvalidationfollowup=""
otherphone=" ()"
preferredphone=""
confidentialcommunication="Email"
communicationnote=""
>
  <span style="white-space: nowrap">APIGEE,TEST</span>
</ppmd:appt>
</ppmd:apptlist>
<globalperiodlist />

```

```
</Results>
<Error />
</PPMDResults>;
```

Sample of JSON Response:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFEGWK8T",
    "Results": {
      "@xmlns:ppmd": "www.perfectpractice.md",
      "ppmd:apptlist": {
        "ppmd:appt": {
          "@id": "appt9545655",
          "@date": "06/23/2021",
          "@time": "10:30",
          "@column": "col16",
          "@patient": "pat5984942",
          "@resppartyname": "API,TEST",
          "@copay": "100%",
          "@copayid": "",
          "@insplan": "",
          "@seq": "",
          "@carriername": "",
          "@carriercode": "",
          "@waitlistid": "",
          "@profile": "prof141",
          "@facility": "fac234",
```



```

"@respparty": "resp6850766",
"@hasconfile": "0",
"@status": "0",
"@checkintime": "",
"@othertime": "",
"@checkouttime": "",
"@comments": "",
"@homephone": "",
"@officephone": "",
"@confuser": "JOHNDOE",
"@confdate": "06/21/2021 01:14P",
"@confmeth": "",
"@dateofbirth": "05/18/1995",
"@gender": "UNKNOWN",
"@typestext": "NP - NEW PATIENT",
"@instrstext": "INS; EARLY; RECORDS",
"@eligibilityid": "",
"@eligibilitycarrierid": "",
"@eligibilitystatusid": "",
"@eligibilityresponsedate": "",
"@eligibilitycreatedat": "",
"@eligibilityvalidation": "",
"@eligibilityvalidationfollowup": "",
"@otherphone": "()",
"@preferredphone": "",
"@confidentialcommunication": "Email",
"@communicationnote": "",
"span": {
    "@style": "white-space: nowrap",
    "#text": "API,TEST"
}
},
"globalperiodlist": null

```

```
    },  
    "Error": null  
  }  
}
```

Notes:

- *Attributes can be named any valid attribute name. For example, if you are interested in the LastName field, you can call the attribute name, last_name, etc.*
- *When you make the "getupdatedpatients" request, you indicate your attribute name as follows: attributename="FieldName", e.g. lastname="LastName" or last_name="LastName".*

Columns Openings

Post: {{Redirect_URL_REST_PM}}/scheduler/Columns/openings

Example JSON:

```
{
  "startdate": "2023-10-20T08:00:00",
  "appointmenttimerange": "2023-10-30T10:00:00",
  "appointmenttime": "2023-10-27T12:00:00",
  "daysofweek": "1111111",
  "profileids": [
    3
  ],
  "columnids": [
    147
  ],
  "duration": 1,
  "includeallholds": true,
  "excludeallholds": true,
  "holdreasonid": 0,
  "bookallcolumns": true,
  "forward": true,
  "includeopenslots": true,
  "observemaxapptsperslot": true
}
```

Scheduler Block and Hold Actions

Get Scheduler Blocks and Holds

This is REST API.

Method: GET

Example URL: `{{Redirect_URL_REST_PM}}/scheduler/blockholds?columnId=16&forView=week&startDate=2023-10-16`

Fetches the list of AdvancedMD.API.Scheduler.ViewModels.BlockHold(s) for the columnId specified starting at startDate with the duration calculated by the forView.

Post Scheduler Blocks and Hold

This is REST API.

Method: POST

Example URL: `{{Redirect_URL_REST_PM}}/scheduler/BlockHolds`

Example Payload:

```
{
  "columnid": 16,
  "type": 1,
  "startdatetime": "2024-10-13T06:19:53.810Z",
  "duration": 60,
  "reasonid": 0,
  "color": "blue",
  "appointmenttypeid": 0,
  "onlinebooking": true,
```

```
"telemedicine": 0,  
"noteText": "testing"  
}
```

Creates a new single occurrence block hold.

Get Scheduler Blocks and Holds by ID

This is REST API.

Method: GET

Example URL: {{Redirect_URL_REST_PM}}/scheduler/BlockHolds/1?columnId=16&startDate=10%2F16%2F2023&endDate=10%2F16%2F2023

Retrieves a specific block/hold by the rule id, column, for the date specified.

Delete Scheduler Blocks and Holds by ID

This is REST API.

Method: DELETE

Example URL: {{Redirect_URL_REST_PM}}/scheduler/BlockHolds/1?columnId=12&date=12%2F2%2F2020

Removes a block hold based on a
AdvancedMD.API.Scheduler.Models.BlockHoldRule.Id for a specific
AdvancedMD.API.Scheduler.Models.Column.

Get Scheduler Blocks and Holds with Parameters

This is REST API.

Method: GET

Example URL: `{{Redirect_URL_REST_`
`PM}}/scheduler/BlockHolds/1/2/2023%2F10%2F16`

/BlockHolds/{forView}/{providerId}/{startDate} Fetches the list of AdvancedMD.API.Scheduler.ViewModels.BlockHold(s) for the providerId specified starting at startDate with the duration calculated by the forView
forView* string(path): Valid values (day|week). The range that we are pulling for where: day equals 1 day. week equals 7 days.
providerId* integer(\$int32)(path): The id of the AdvancedMD.API.Scheduler.Models.Provider to pull the list of AdvancedMD.API.Scheduler.ViewModels.BlockHold for.
startDate* string(\$date-time)(path): The date (yyyy-MM-dd) to start fetching the AdvancedMD.API.Scheduler.ViewModels.BlockHold(s) for. The time portion is removed before the date comparisons are made for all views.
*Required.

Telehealth Requests

Get Invitation URL

This is REST API

Verb: POST

URL template: https://providerapi.advancedmd.com/api/{{amd.host}}/{{amd.appname}}/Telehealth/Invitations

URL example: https://providerapi.advancedmd.com/api/api-101/TEMP/Telehealth/Invitations

Attributes & Details:

- Request body note: A request containing either appointmentId or appointmentGroupId but not both!
 - appointmentid – the telehealth appointment id.
 - appointmentgroupid - the telehealth group appointment id.

Sample JSON Request:

```
{  
  
  "appointmentid": 9601155  
  
}
```

Sample JSON Request 2:

```
{  
  
  "appointmentgroupid": 87899  
  
}
```

Sample JSON Reponse:

```
{  
  
  "url":  
  "https://telehealth.advancedmd.com/#/join/1wc7bbbo"  
  
}
```

Create Telehealth Block/Hold

This is REST API

Verb: POST

URL template: https://providerapi.advancedmd.com/api/{{amd.host}}/{{amd.appname}}/telehealth/ExternalBlocks

URL example: https://providerapi.advancedmd.com/api/api-101/TEMP/telehealth/ExternalBlocks

Attributes and Details:

Request body note:

- A request must contain "patientId" and "externallink" values! Also "externallink" must contain link with "https" and "www" elements.
 - patientId – the patient id (required)
 - externallink – the link in regular URL format (required)
 - displaymessage – the displayed message
 - externallinklabel – label for the external link, provided above

Sample JSON Request:

```
{  
  
  "patientid": 61720,  
  
  "displaymessage": "string1",  
  
  "externallinklabel": "string1",  
  
  "externallink": "https://www.facebook.com"  
}
```

Sample JSON Response (integer):

31

Get Telehealth Block/Hold

This is REST API

Verb: GET

URL template: https://providerapi.advancedmd.com/api/{{amd.host}}/{{amd.appname}}/telehealth/ExternalBlocks?patientId={{patientId}}

URL example: https://providerapi.advancedmd.com/api/api-101/TEMP/telehealth/ExternalBlocks?patientId=61720

Get request returns ExternalBlock id for current patient.

Sample JSON Response (integer):

31

Delete Telehealth Block/Hold

This is REST API

Verb: DELETE

URL template: `https://providerapi.advancedmd.com/api/{{amd.host}}/{{amd.appname}}/telehealth/ExternalBlocks/{{id}}`

URL example: `https://providerapi.advancedmd.com/api/api-101/TEMP/telehealth/ExternalBlocks/31`

DELETE request removes ExternalBlock id.

Successful call returns 204 status code, "No content" status message and no payload.

Referral Requests

Add Marketing Referral (Save)

This is REST API.

Request

- Verb – POST
- Basepath – /API
- Pathsuffix – /referral/MarketingReferrals

URL – {{webserverbaseurl from login call}}/{{Host}}/
{{AppName}}/referral/MarketingReferrals

e.g – https://providerapi.advancedmd.com/api/api-101/{{YourAppName}}/
/referral/MarketingReferrals

Action: addreferral

Sample of JSON Request:

```
{
  "patientid": 99999999,
  "statusid": 22,
  "sourceid": 2,
  "description": "some data",
  "note": "note about this referral"
}
```

Attributes:

Required:

- patientid – the identifier of the patient that we want to add referral to; (\$int32)
- statusid – The id of the status for new referral; (\$int32)
- sourceid – The id of the source for new referral. (\$int32)

Optional:

- description – description for new referral; (\$string)
- note – some notes for our referral; (\$string)

Sample of successful response:

```
{
  "notes": [],
  "id": 1096,
  "statusid": 22,
  "sourceid": 1,
  "description": "",
  "createdby": "USER_JSMITH",
  "createdat": "2021-06-08T06:25:51.383",
  "changedby": "",
  "changedat": null
}
```

Update Marketing Referral (Save)

This is REST API.

Request

- Verb – PUT
- Basepath – /API
- Pathsuffix – /referral/MarketingReferrals/{id of referral}

URL – {{webserverbaseurl from login call}}/{{Host}}/
{{AppName}}/referral/MarketingReferrals/{id of referral}

E.g – https://providerapi.advancedmd.com/api/api-101/
{{YourAppName}}/referral/MarketingReferrals/9

Action: updatereferral

Sample of JSON Request:

```
{
  "statusid": 22,
  "sourceid": 2,
  "description": "some data",
  "note": "note about this referral"
}
```

Attributes:

Required:

- statusid – The id of the status for new referral; (\$int32)
- sourceid – The id of the source for new referral. (\$int32)

Optional:

- description – description for new referral; (\$string)
- note – the identifier for the profile; (\$string)

Sample of Successful Response:

```
{
  "notes": [
    {
      "id": 3911544,
      "note": "Hello world 2021-06-10T14:52:29.408Z",
      "timestamp": "2021-06-10T07:52:29.077",
      "username": "USER_JSMITH"
    },
    {
      "id": 3911543,
      "note": "Hello world 2021-06-09T16:42:13.798Z",
      "timestamp": "2021-06-09T09:42:14.13",
      "username": "USER_BJACKSON"
    }
  ],
  "id": 1103,
  "statusid": 23,
  "sourceid": 2,
  "description": "string",
  "createdby": "USER_GWILSON",
  "createdat": "2021-06-08T07:00:48.783",
  "changedby": "USER_BJACKSON",
  "changedat": "2021-06-10T07:52:29.077"
}
```

Add Inbound Referral

Type: REST API

URL : {{Redirect_URL_REST_PM}}/referral/inboundreferrals

Method: POST

Body Example:

```
{
  "referralnumber": "",
  "reason": "",
  "byreferringproviderid": 489,
  "toreferringproviderid": null,
  "statusid": null,
  "facility": null,
  "facilityid": null,
  "carrier": null,
  "carrierid": null,
  "referral diagnosis codes": [],
  "referral notes": [],
  "exclude from claim": false,
  "preauthorization required": false,
  "patientid": 111,
  "effectivedate": "2023-02-07",
  "expirationdate": "2023-05-08",
  "authorization": {
    "authorizationnumber": "",
    "description": "",
    "statusid": null,
    "carrierid": null,
    "carrier": null,
    "expirationdate": "2023-05-08",
    "warnremainingunits": null,
  }
}
```

```
"warnremainingamount": null,
"authorizationdiagnosis": [],
"authorizationnotes": [],
"authorizationcounts": [
  {
    "authorizedunits": 0,
    "authorizedamount": 0,
    "authorizedminutes": 0,
    "authorizedvisits": 0,
    "remainingunits": 0,
    "remainingamount": 0,
    "remainingminutes": 0,
    "remainingvisits": 0,
    "procedurecodes": [],
    "isdefault": true
  }
],
"warnremainingminutes": 0,
"warnremainingvisits": 0,
"warnremainingdays": 0,
"effectivedate": "2023-02-07"
}
```

System Settings (Master File) Actions (REST)

Get Provider Types for Intake Provider Setup

This is REST API.

Request Verb – GET

Basepath – /API

Pathsuffix – /masterfile/providertypes/

URL: {{webserverbaseurl from login call}}/{{Host}}/
{{AppName}}/masterfile/providertypes/

Example: https://providerapi.advancedmd.com/api/api-101/
{{YourAppName}}/masterfile/providertypes

Action: get all provider types

Sample of Successful Response:

```
[
  {
    "id": 169,
    "name": "APN"
  },
  {
    "id": 55,
    "name": "MID-WIFE"
  },
  {
    "id": 49,
    "name": "NURSE PRACTITIONER"
  }
]
```

Get All Appointment Reasons by Provider ID

This is REST API.

Request

Verb – GET

Basepath – /API

Pathsuffix – /masterfile/reasonsforvisit/provider-type/{id of provider}

URL: {{webserverbaseurl from login call}}/{{Host}}/
{{AppName}}/masterfile/reasonsforvisit/provider-type/{id of provider}

Example: https://providerapi.advancedmd.com/api/api-101/
{YourAppName}/masterfile/reasonsforvisit/provider-type/49

Sample of Successful Response:

```
[
  {
    "appttypeid": 13,
    "profiles": null,
    "id": 1,
    "name": "Arm ache",
    "checked": false
  },
  {
    "appttypeid": null,
    "profiles": null,
    "id": 6,
    "name": "Anxiety",
    "checked": false
  },
]
```

```
{
  "appttypeid": null,
  "profiles": null,
  "id": 13,
  "name": "Other",
  "checked": false
}
]
```

Save Appointment Reason

This is REST API.

Request

Verb – POST

Basepath – /API

Pathsuffix – /masterfile/reasonsforvisit/

URL: {{webserverbaseurl from login call}}/{{Host}}/
{{AppName}}/masterfile/reasonsforvisit/

Example: https://providerapi.advancedmd.com/api/api-101/
{{YourAppName}}/masterfile/reasonsforvisit/

Action: add appointment reason

Sample of JSON request:

```
{
  "name": "My new reason",
  "checked": false,
  "appttypeid": 1935,
  "profiles": []
}
```

Attributes

Required

- name – The name of created appointment reason (it's used as id, so there can't be two reasons with the same id); (\$string)

- checked – Whether new reason should already be checked or not.
(\$boolean)

Optional:

- appttypeid
- profiles

Sample of Successful Response:

```
{  
  "appttypeid": 1935,  
  "profiles": null,  
  "id": 1,  
  "name": "My new reason",  
  "checked": false  
}
```

Update Appointment Reasons For Provider Type

This is REST API.

Request

Verb – PUT

Basepath – /API

Pathsuffix – /masterfile/reasonsforvisit/provider-type/{id of provider type}

URL: {{webserverbaseurl from login call}}/{{Host}}/
{{AppName}}/masterfile/reasonsforvisit/provider-type/{id of provider type}

Example: https://providerapi.advancedmd.com/api/api-101/
{{YourAppName}}/masterfile/reasonsforvisit/provider-type/49

Action: update appointment reasons for any provider type

Sample of JSON Request:

```
[{
  "appttypeid": 1935,
  "checked": true,
  "endage": null,
  "id": 4,
  "modified": true,
  "name": "My new reason",
  "profiles": null,
  "rangetype": 2696,
  "startage": null
}]
```

Attributes

Required:

- id – id of updated reason(\$int32)

Optional:

- rangetype
- name – the name of updated appointment reason (currently it has no influence on backend); (\$string)
- profiles
- modified
- endage
- checked
- appttypeid
- startage

This request does not allow us to update name of appointment reason, so if you need to change it, you should use Update Appointment Reason.

Sample of Successful Response:

Statuscode: 200

Update Appointment Reason

This is REST API.

Request

Verb – PUT

Basepath – /API

Pathsuffix – /masterfile/reasonsforvisit/{id of appt reason}

URL: {{webserverbaseurl from login call}}/{{Host}}/
{{AppName}}/masterfile/reasonsforvisit/{id of appt reason}

Example: https://providerapi.advancedmd.com/api/api-101/
{{YourAppName}}/masterfile/reasonsforvisit/24

Action: update appointment reason

Sample of JSON Request:

```
{
  "appttypeid": 97,
  "profiles": null,
  "id": 83,
  "name": "New name for reason",
  "checked": false,
  "rangetype": 2696,
  "startage": null,
  "endage": null,
  "modified": true
}
```

Attributes

Required:

- id – id of updated reason (\$int32)

Optional:

- rangetype (\$int32)
- name– the name of updated appointment reason (currently it has no influence on backend); (\$string)
- profiles (array of objects)
- modified (\$bool)
- endage (\$int32)
- checked (\$bool)
- appttypeid (\$int32)
- startage (\$int32)

This request allows us to change, for example, name for appointment reason, and it also changes params for all provider types, unlike [Update Appointment Reasons \(for provider type\)](#).

Sample of Successful Response:

```
{
  "appttypeid": null,
  "profiles": null,
  "id": 24,
  "name": " New name for reason ",
  "checked": false
}
```

Delete Appointment Reason

This is REST API.

Request

Verb: DELETE

Basepath: /API

Pathsuffix: /masterfile/reasonsforvisit/{id of appt reason}

URL: {{webserverbaseurl from login call}}/{{Host}}/
{{AppName}}/masterfile/reasonsforvisit/{id of appt reason}

Example: https://providerapi.advancedmd.com/api/api-101/
{{YourAppName}}/masterfile/reasonsforvisit/24

Action: delete appointment reason

Sample of Successful Response:

Status code: 204 No Content

Get Scheduler Setup

Action: getschedulersetup

JSON Example:

```
{
  "ppmdmsg": {
    "@action": "getschedulersetup",
    "@class": "masterfiles",
    "@msgtime": "10/18/2022 12:59:03 PM"
  }
}
```

Result

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI2WFEOMM4K" lst="10/18/2022 1:43:25 PM">
  <Results>
    <pagelist>
      <page id="pg1" name="INT MED - EAST" group=""
columns="col147 col16 col17 col146 col1080 col20" />
    </pagelist>
    <columnlist>
      <column id="col18" name="ADAMS" profile="prof107"
useptprov="0" facility="">
        <columnsetting start="08:00" end="17:00"
interval="15" workweek="1111100" autoholddays="7"
useautoholddefault="1" maxapptsperslot="0" />
      </column>
    </columnlist>
  </Results>
</PPMDResults>
```

```

        <profilelist>
            <profile id="prof17" code="ADAMS" name="ADAMS,
ADAMS" email="">
                <columnsetting start="07:00" end="20:00"
interval="10" workweek="1111100" />
            </profile>
        </profilelist>
        <cstemplatelist>
            <cstemplate id="cst97" code="FAM" name="FAM PRAC"
/>
        </cstemplatelist>
        <facilitylist>
            <facility id="fac3" code="MSC" name="SURGICAL
CENTER" />
        </facilitylist>
    </Results>
    <Error />
</PPMDResults>

```

Get Appointments

This is REST API.

Example: `{{Redirect_URL_REST_PM}}/scheduler/appointments?columnId=16-17-20&forView=day&isLegacy=true&startDate=2025-05-08`

Sample of Successful Response:

```
[
  {
    "id": 9641834,
    "startdatetime": "2025-05-08T10:00:00",
    "status": 0,
    "telehealthsubstatus": null,
    "telemedappointmentstatus": null,
    "confirmdate": null,
    "columnid": 17,
    "heading": "MILLER EAST",
    "profileid": 9,
    "provider": "MILLER,ALEX",
    "providercode": "MILL00",
    "facilityid": 1,
    "facility": " ",
    "facilitycode": " ",
    "episodeid": 6027506,
    "episode": "STANDARD",
    "patientid": 6062526,
    "firstname": "Batty",
    "lastname": "Test",
    "middlename": "",
    "preferredfirstname": "",
    "preferredlastname": "",
    "preferredmiddlename": "",
    "ssn": " ",
  }
]
```

```
"dob": "1991-01-01T00:00:00",
"patientemail": "",
"patientinactivestatusid": null,
"ispatientapproved": true,
"chartnumber": "58",
"deceased": null,
"gender": "U",
"patientaddress": {
  "address1": "",
  "address2": "",
  "city": "",
  "state": "",
  "zipcode": "      ",
  "countrycode": ""
},
"responsiblepartyid": 6931796,
"hasccof": false,
"rpname": "Test,Batty",
"copay": null,
"paymentid": null,
"coverageid": null,
"carriername": null,
"carriercode": null,
"waitlist": null,
"recurringappointmentid": null,
"recurringappointment": null,
"hasrecurrenceexception": false,
"recurrenceexception": null,
"transitionofcare": false,
"tocrequestedavailable": null,
"istelemedicine": false,
"duration": 30,
"color": "ORANGE",
"colorv2": null,
```

```
"comments": "",
"referralplanid": 7038971,
"authorizations": null,
"referringprovider": null,
"visitposted": false,
"chargesposted": false,
"homephone": " ",
"officephone": " ",
"officeextension": " ",
"otherphone": " ",
"otherphonetype": "C",
"preferredphone": "",
"appointmenttypeids": [
    1170
],
"appointmenttype": null,
"appointmentinstruction": null,
"sequence": null,
"globalperiod": null,
"insuranceorder": "2",
"insurance": null,
"arpatientbalance": null,
"arfamilybalance": null,
"remainingvisits": null,
"maxauthvisits": null,
"authvisitsused": null,
"appointmentgroupid": null,
"superbill": null,
"linkednotestatus": 0,
"paymentstatustype": null,
"arrivetime": null,
"othertime": null,
"seentime": null,
"confirmmethod": null,
```

```

        "cancelnoshowreason": null,
        "patienttimezone": {
            "id": 5,
            "displayname": "(UTC-07:00) Mountain Time (US &
Canada)",
            "abbreviation": "MST",
            "isdefault": true
        },
        "cancelnoshowresponseinfo": null,
        "creationdate": "0001-01-01T00:00:00",
        "modifieddate": "0001-01-01T00:00:00",
        "appttypes": null,
        "licensekey": 0,
        "providervm": null,
        "precallschatstatus": null,
        "precallschatmessageunread": null
    },
    {
        "id": 9641833,
        "startdatetime": "2025-05-08T15:30:00",
        "status": 0,
        "telehealthsubstatus": null,
        "telemedappointmentstatus": null,
        "confirmdate": null,
        "columnid": 17,
        "heading": "MILLER EAST",
        "profileid": 9,
        "provider": "MILLER,ALEX",
        "providercode": "MILL00",
        "facilityid": 1,
        "facility": " ",
        "facilitycode": "   ",
        "episodeid": 6028606,
        "episode": "STANDARD",

```

```
"patientid": 6063923,
"firstname": "ETHNICITY2",
"lastname": "TEST",
"middlename": "",
"preferredfirstname": "",
"preferredlastname": "",
"preferredmiddlename": "",
"ssn": "          ",
"dob": "1999-01-01T00:00:00",
"patientemail": "",
"patientinactivestatusid": null,
"ispatientapproved": true,
"chartnumber": "83",
"deceased": null,
"gender": "U",
"patientaddress": {
  "address1": "",
  "address2": "NOWHERE",
  "city": "GOLDEN ISLES",
  "state": "FL",
  "zipcode": "33009    ",
  "countrycode": ""
},
"responsiblepartyid": 6933308,
"hasccof": false,
"rpname": "TEST,ETHNICITY2",
"copay": null,
"paymentid": null,
"coverageid": null,
"carriername": null,
"carriercode": null,
"waitlist": null,
"recurringappointmentid": null,
"recurringappointment": null,
```

```

"hasrecurrenceexception": false,
"recurrenceexception": null,
"transitionofcare": false,
"tocrequestedavailable": null,
"istelemedicine": false,
"duration": 20,
"color": "PINK",
"colorv2": null,
"comments": "",
"referralplanid": 7040136,
"authorizations": null,
"referringprovider": null,
"visitposted": false,
"chargesposted": false,
"homephone": " ",
"officephone": " ",
"officeextension": " ",
"otherphone": " ",
"otherphonetype": " ",
"preferredphone": "",
"appointmenttypeids": [
    210
],
"appointmenttype": null,
"appointmentinstruction": null,
"sequence": null,
"globalperiod": null,
"insuranceorder": "",
"insurance": null,
"arpatientbalance": null,
"arfamilybalance": null,
"remainingvisits": null,
"maxauthvisits": null,
"authvisitsused": null,

```

```

"appointmentgroupid": null,
"superbill": null,
"linkednotestatus": 0,
"paymentstatustype": null,
"arrivetime": null,
"othertime": null,
"seentime": null,
"confirmmethod": null,
"cancelnoshowreason": null,
"patienttimezone": {
  "id": 5,
  "displayname": "(UTC-07:00) Mountain Time (US &
Canada)",
  "abbreviation": "MST",
  "isdefault": true
},
"cancelnoshowresponseinfo": null,
"creationdate": "0001-01-01T00:00:00",
"modifieddate": "0001-01-01T00:00:00",
"appttypes": null,
"licensekey": 0,
"providervm": null,
"precallchatstatus": null,
"precallchatmessageunread": null
},
{
  "id": 9641749,
  "startdatetime": "2025-05-08T16:00:00",
  "status": 0,
  "telehealthsubstatus": null,
  "telemedappointmentstatus": null,
  "confirmdate": null,
  "columnid": 16,
  "heading": "BABBIT EAST",

```

```

"profileid": 18,
"provider": "BABBIT, CASEY",
"providercode": "BABBIT",
"facilityid": 1,
"facility": " ",
"facilitycode": " ",
"episodeid": 5987294,
"episode": "STANDARD",
"patientid": 6022732,
"firstname": "KONSTANTIN",
"lastname": "TEST",
"middlename": "",
"preferredfirstname": "",
"preferredlastname": "",
"preferredmiddlename": "",
"ssn": "XXX-XX-1221",
"dob": "1984-12-04T00:00:00",
"patientemail": "MONAMI@IBM.COM",
"patientinactivestatusid": null,
"ispatientapproved": true,
"chartnumber": "31",
"deceased": null,
"gender": "M",
"patientaddress": {
  "address1": "",
  "address2": "60 RAMBLEWOOD",
  "city": "PALM COAST",
  "state": "FL",
  "zipcode": "32164",
  "countrycode": ""
},
"responsiblepartyid": 6886247,
"hasccof": false,
"rpname": "TEST,KONSTANTIN",

```

```
"copay": null,
"paymentid": null,
"coverageid": null,
"carriername": null,
"carriercode": null,
"waitlist": null,
"recurringappointmentid": null,
"recurringappointment": null,
"hasrecurrenceexception": false,
"recurrenceexception": null,
"transitionofcare": true,
"tocrequestedavailable": null,
"istelemedicine": false,
"duration": 15,
"color": "RED",
"colorv2": null,
"comments": "",
"referralplanid": 6939608,
"authorizations": null,
"referringprovider": null,
"visitposted": false,
"chargesposted": false,
"homephone": "8015059065",
"officephone": " ",
"officeextension": " ",
"otherphone": "3866275963",
"otherphonetype": "C",
"preferredphone": "Home: 801-505-9065",
"appointmenttypeids": [
    1935
],
"appointmenttype": null,
"appointmentinstruction": null,
"sequence": null,
```

```

    "globalperiod": null,
    "insuranceorder": "",
    "insurance": null,
    "arpatientbalance": null,
    "arfamilybalance": null,
    "remainingvisits": null,
    "maxauthvisits": null,
    "authvisitsused": null,
    "appointmentgroupid": null,
    "superbill": null,
    "linkednotestatus": 0,
    "paymentstatustype": null,
    "arrivetime": null,
    "othertime": null,
    "seentime": null,
    "confirmmethod": null,
    "cancelnoshowreason": null,
    "patienttimezone": {
      "id": 5,
      "displayname": "(UTC-07:00) Mountain Time (US &
Canada)",
      "abbreviation": "MST",
      "isdefault": true
    },
    "cancelnoshowresponseinfo": null,
    "creationdate": "0001-01-01T00:00:00",
    "modifieddate": "0001-01-01T00:00:00",
    "appttypes": null,
    "licensekey": 0,
    "providervm": null,
    "precallchatstatus": null,
    "precallchatmessageunread": null
  }
]

```

Chart (EHR) Actions

Get an Allergies List

Action: getehrallergies

Sample XML:

```
<ppmdmsg
  action="getehrallergies"
  class="api"
  msgtime="6/7/2016 6:28:09 PM"
  patientid="15963"
>
  <allergy
    allergy="Allergy"
    updatedate="UpdateDate"
    reaction="Reaction"
    treatment="Treatment"
    username="UserName"
    drugallergycatid="DrugAllergyCatID"
    ncallergycatid="NcAllergyCatId"
    status="Status"
    StartDate="StartDate"
  />
</ppmdmsg>;
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrallergies",
    "@class": "api",
    "@msgtime": "6/7/2016 6:28:09 PM",
    "@patientid": "15963",
    "allergy": {
      "@allergy": "Allergy",
```

```

        "@updatedate": "UpdateDate",
        "@reaction": "Reaction",
        "@treatment": "Treatment",
        "@username": "UserName",
        "@drugallergycatid": "DrugAllergyCatID",
        "@ncallergycatid": "NcAllergyCatId",
        "@status": "Status",
        "@startdate": "StartDate"
    }
}
}

```

Attributes:

patientid: The unique ID of the patient whose allergies you wish to retrieve

Results:

This request returns a < allergylist> element or object that contains a list of all allergies specific for the certain patient. It will return all allergies current and historic. Every returned element (<allergy >) will contain an ID attribute.

Sample XML:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="DEV07-WF01" lst="6/7/2016 9:56:08 AM">
  <Results servertime="2016-06-07T09:56:08.993"
allergycount="4">
    <allergylist>
      <allergy
        id="487"
        allergy="NKDA"
        updatedate="2011-04-11T07:25:11.753"
        reaction=""

```

```

treatment=""
username="LAURETTA PARKS"
drugallergycatid="0"
ncallergycatid="0"
status="Current"
StartDate="1900-01-01T00:00:00"
/>
<allergy
  id="14988"
  allergy="unk"
  updatedate="2016-02-26T08:13:23.970"
  reaction=""
  treatment=""
  username="Global User"
  drugallergycatid="0"
  ncallergycatid="0"
  status="Current"
  StartDate="1900-01-01T00:00:00"
/>
<allergy
  id="14989"
  allergy="unk"
  updatedate="2016-03-07T06:26:03.370"
  reaction=""
  treatment=""
  username="Global User"
  drugallergycatid="0"
  ncallergycatid="0"
  status="Historic"
  StartDate="1900-01-01T00:00:00"
/>
<allergy
  id="14991"
  allergy="unk"

```

```

        updatedate="2016-03-07T07:47:16.657"
        reaction=""
        treatment=""
        username="Global User"
        drugallergycatid="0"
        ncallergycatid="0"
        status="Current"
        StartDate="1900-01-01T00:00:00"
    />
</allergylist>
</Results>
</PPMDResults>;

```

Sample JSON:

```

{
  "PPMDResults": {
    "@s": "DEV07-WF01",
    "@lst": "6/7/2016 9:56:08 AM",
    "Results": {
      "@servertime": "2016-06-07T09:56:08.993",
      "@allergycount": "4",
      "allergylist": {
        "allergy": [
          {
            "@id": "487",
            "@allergy": "NKDA",
            "@updatedate": "2011-04-11T07:25:11.753",
            "@username": "LAURETTA PARKS",
            "@drugallergycatid": "0",
            "@ncallergycatid": "0",
            "@status": "Current",

```



```

        "@StartDate": "1900-01-01T00:00:00"
    },
    {
        "@id": "14988",
        "@allergy": "unk",
        "@updatedate": "2016-02-26T08:13:23.970",
        "@username": "Global User",
        "@drugallergycatid": "0",
        "@ncallergycatid": "0",
        "@status": "Current",
        "@StartDate": "1900-01-01T00:00:00"
    },
    {
        "@id": "14989",
        "@allergy": "unk",
        "@updatedate": "2016-03-07T06:26:03.370",
        "@username": "Global User",
        "@drugallergycatid": "0",
        "@ncallergycatid": "0",
        "@status": "Historic",
        "@StartDate": "1900-01-01T00:00:00"
    },
    {
        "@id": "14991",
        "@allergy": "unk",
        "@updatedate": "2016-03-07T07:47:16.657",
        "@username": "Global User",
        "@drugallergycatid": "0",
        "@ncallergycatid": "0",
        "@status": "Current",
        "@StartDate": "1900-01-01T00:00:00"
    }
]
}

```

}
}
}

Add Patient Allergy

This is a REST API.

Verb: Post

- URL template: `https://providerapi.advancedmd.com/ehr-api/{HOST}/{APPNAME}/allergiescore/patientallergies`
- URL example: `https://providerapi.advancedmd.com/ehr-api/pm-api-101/TEMP/allergiescore/patientallergies?patientId=111`

Action: Add new patient allergy to the database

Sample Body:

```
{
  "patientId": 111,
  "ncAllergyCatId": 3870,
  "allergy": "Nubain",
  "statusLookupId": 112,
  "severityStatusId": 6,
  "startDate": "2024-06-15T20:27:19.704Z",
  "treatment": "asd2",
  "reactions": [
    {
      "reaction": "Dead fetus in utero",
      "snomed": "445548006"
    }
  ]
}
```

Sample Result:

```
{
  "allergy": "Nubain",
  "reaction": null,
  "reactions": [
    {
      "id": null,
      "snomed": "445548006",
      "reaction": "Dead fetus in utero"
    }
  ],
  "treatment": "asd2",
  "drugAllergyCatId": null,
  "ncAllergyCatId": 3870,
  "statusLookupId": 112,
  "severityStatusId": 6,
  "startDate": "06/15/2024"
}
```

Successful Response: 201 – The value was created.

Get Allergy Severity List

Method: GET

Endpoint: URL template: <https://providerapi.advancedmd.com/ehr-api/{HOST}/{APPNAME}//allergiescore/allergies/severitystatuses>

Sample Result:

```
[
  {
    "id": 1,
    "status": "Mild"
  }
]
```

Get Allergy Reaction List

Method: GET

Endpoint: URL template: <https://providerapi.advancedmd.com/ehr-api/{HOST}/{APPNAME}//allergiescore/allergies/reactions?query=it>

Sample Result:

```
[
  {
    "allergyReactionId": 283,
    "description": "Itch",
    "snomed": "418290006"
  }
]
```

Get Allergy Category

Method: GET

Endpoint: URL template: <https://providerapi.advancedmd.com/ehr-api/{HOST}/{APPNAME}//allergiescore/allergies/categories?query=a>

Sample Result:

```
[
  {
    "id": 7,
    "description": "Acamprosate And Derivatives",
    "rxNorm": null
  }
]
```

Get a Problem List

Action: getehrproblems

Sample XML:

```
<ppmdmsg action='getehrproblems' class='api' msgtime='7/1/2015
12:08:35 PM' patientid='57664' includedeleted='0'<problem
diagnosisid='DiagnosisID' diagnosiscode='DiagnosisCode'
diagnosisdescription='DiagnosisDescription' status='Status'
problemdate='ProblemDate' />
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrproblems",
    "@class": "api",
    "@msgtime": "4/1/2004 3:43:17 PM",
    "@patientid": "57664",
    "@includedeleted": "0",
    "problem": {
      "@diagnosisid": "DiagnosisID",
      "@diagnosisdescription": "DiagnosisDescription",
      "@status": "Status",
      "@problemdate": "ProblemDate"
    }
  }
}
```

Attributes:

patientid: The unique ID of the patient whose problems you wish to retrieve. Generally, this will have been returned by a "getupdatedvisits" or "getdatevisit" request.

includedeleted: Optional (default = 0). Set to "1" if you want deleted problems to be returned.

Results:

This request returns a <problemlist> element or object that contains a list of all problems specific for the certain patient. Every returned element (<problem>) will contain an ID attribute.

Sample XML:

```
<PPMDResults>
  <Results servertime="2015-07-03T07:44:40.577"
    problemcount="1">
    <problemlist>
      <problem id="16974" DiagnosisID="71580"
        DiagnosisCode="595.9" DiagnosisDescription="CYSTITIS"
        DiagnosisCodeSet="9" StatusID="18" Status="Historic"
        LegacyProblemDescription="" ProblemDate="07/09/2012"
        StatusChangedDate="07/09/2012" />
    </problemlist>
  </Results>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "Results": {
      "problem": {
        "@id": "16974",
        "@DiagnosisID": "71580",
        "@DiagnosisCode": "595.9",
        "@DiagnosisDescription": "CYSTITIS",
        "@DiagnosisCodeSet": "9",
        "@StatusID": "18",
        "@Status": "Historic",
```

```
        "@LegacyProblemDescription":"","  
        "@ProblemDate":"07/09/2012",  
        "@StatusChangedDate":"07/09/2012"  
    }  
}  
}  
}
```

Get a List of Fields Available to "getehrproblems"

Action: getehrproblemstemplate

Sample XML:

```
<ppmdmsg action="getehrproblemstemplate" class="api"
msgtime="7/24/2015 10:33:06 AM">
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrproblemstemplate",
    "@class": "api",
    "@msgtime": "7/24/2015 10:33:06 AM"
  }
}
```

Results:

This request returns a template that "getehrproblems" requests can be based on. It includes every optional field that is available for the <problem> elements. The following sample document is a very small subset of the fields actually returned.

Sample XML:

```
<PPMDResults>
  <Results>
    <problem id="[auto]" updatestatus="[auto]"
```

```
patientid="PatientID" diagnosisid="DiagnosisID"
diagnosiscode="DiagnosisCode" .../>
    </Results>
    <Error/>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "Results": {
      "problem": {
        "@id": "[auto]",
        "@updatestatus": "[auto]",
        "@patientid": "PatientID",
        "@diagnosisid": "DiagnosisID",
        "@diagnosiscode": "DiagnosisCode",
        ...
      },
    },
    "Error": null
  }
}
```

Notes:

- *Attributes can be named any valid attribute name. For example, if you are interested in the DiagnosisCode field, you can call the attribute diagnosiscode, code, etc. When you make the "getehrproblems" request, you indicate your attribute name as follows: attributename="FieldName", e.g. diagnosiscode="DiagnosisCode" or code="DiagnosisCode".*

Add a Problem

Action:addehrproblem

Sample XML:

```
<ppmdmsg action='addehrproblem' class='api'
msgtime='12/14/2015 2:29:03 AM'
patientid='57664'><problemlist><problem diagnosisid='71580'
statusid='19' problemdate='11/01/2015'
legacyproblemdescription='LegacyProblemDescription Test-1'
statuschangeddate='11/02/2015' display='1' /><problem
diagnosisid='71580' statusid='19' problemdate='11/01/2015'
legacyproblemdescription='LegacyProblemDescription Test-2'
statuschangeddate='11/02/2015' display='1'
/></problemlist></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "addehrproblem",
    "@class": "api",
    "@msgtime": "12/14/2015 2:29:03 AM",
    "@patientid": "57664",
    "problemlist": {
      "problem": {
        "@display": "1",
        "@statuschangeddate": "11/02/2015",
        "@legacyproblemdescription": "LegacyProblemDescription
Test-1",
        "@problemdate": "11/01/2015",
        "@statusid": "19",
        "@diagnosisid": "71580"
      },
      "problem": {
```

```

        "@display": "1",
        "@statuschangeddate": "11/02/2015",
        "@legacyproblemdescription": "LegacyProblemDescription
Test-2",
        "@problemdate": "11/01/2015",
        "@statusid": "19",
        "@diagnosisid": "71580"
    }
}
}
}

```

Results:

This action returns createdate in <PPMDResults> element.

Sample XML:

```

<PPMDResults s="SOFTSERVE001" lst="12/15/2015 8:21:13 AM"
n="1">
    <Results success="1" createdate="2015-12-15T08:21:13.133" />
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "@n": "1",
    "@lst": "12/15/2015 8:21:13 AM",
    "@s": "SOFTSERVE001",
    "Results": {
      "@createdate": "2015-12-15T08:21:13.133",
      "@success": "1"
    }
  }
}

```

```
}  
}
```

Attributes:

- patientid: (Required) The unique ID of the patient for whom you wish to add the problem

Notes: *Below the list of attributes applicable for adding the problem:*

- *diagnosisid: (Optional) The Diagnosis ID of the problem*
- *diagnosiscode: (Optional) The Diagnosis Code of the problem*
- *statusid: (Optional) The Status ID*
- *status: (Optional) The Status*
- *problemdate: (Optional) The Problem Date*
- *legacyproblemdescription: (Optional) The Problem Description*
- *statuschangeddate: (Optional) The Problem Statues Change Date*
- *display: (Optional) The Problem Visibility Flag*

Update a Problem

Action:updateehrproblem

Sample XML:

```
<ppmdmsg action="updateehrproblem" class="api"
msgtime="12/14/2015 2:29:03 AM"
  patientid="57664">
  <problemlist>
    <problem id="36787" diagnosisid="71580" statusid="18"
problemupdate="11/02/2015"
      legacyproblemdescription="LegacyProblemDescription Test-
1"      statuschangeddate="11/02/2015" display="1" />
    <problem id="36788" diagnosiscode="054.10" statusid="17"
problemdate="11/01/2015"
      legacyproblemdescription="LegacyProblemDescription Test-3"
statuschangeddate="11/02/2015" display="0" />
  </problemlist>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "updateehrproblem",
    "@patientid": "57664",
    "@msgtime": "12/14/2015 2:29:03 AM",
    "@class": "api",
    "problemlist": {
      "problem": [
        {
          "@id": "36787",
          "@display": "1",
          "@statuschangeddate": "11/02/2015",
          "@legacyproblemdescription":
"LegacyProblemDescription Test-1",
```



```

        "@statusid": "18",
        "@diagnosisid": "71580",
        "@problemupdate": "11/02/2015"
    },
    {
        "@id": "36788",
        "@display": "0",
        "@statuschangeddate": "11/02/2015",
        "@legacyproblemdescription":
"LegacyProblemDescription Test-3",
        "@problemdate": "11/01/2015",
        "@statusid": "17",
        "@diagnosiscode": "054.10"
    }
]
}
}
}

```

Results:

This action returns updatedate in <PPMDResults> element.

Sample XML:

```

<PPMDResults s="SOFTSERVE001" lst="12/15/2015 9:17:24 AM"
n="1">
    <Results success="1" createdate="2015-12-15T09:17:22.590" />
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "@n": "1",
    "@lst": "12/15/2015 9:17:24 AM",
    "@s": "SOFTSERVE001",
    "Results": {
      "@createdate": "2015-12-15T09:17:22.590",
      "@success": "1"
    }
  }
}

```

Attributes:

- patientid:(Required) The unique ID of the patient for whom you wish to update the problem
- id:(Required) The unique ID of the Problem you wish to update

Notes: Below the list of attributes applicable for updating the problem:

- *diagnosisid: (Optional) The Diagnosis ID of the problem*
- *statusid: (Optional) The Status ID*
- *legacyproblemdescription: (Optional) The Problem Description*
- *statuschangeddate: (Optional) The Problem Statues Change Date*
- *display: (Optional) The Problem Visibility Flag*

Get Profiles

Action: getehrprofiles

Class: masterfiles

Sample XML:

```
<ppmdmsg action="getehrprofiles" class="masterfiles"
msgtime="10/5/2016 1:32:27 PM"></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrprofiles",
    "@class": "masterfiles",
    "@msgtime": "10/5/2016 1:32:27 PM",
    "@pmerx": "1"
  }
}
```

Results:

Sample XML:

```
<PPMDResults s="DEV07-WF01" lst="10/5/2016 8:50:44 AM">
  <Results>
    <profilelist>
      <profile id="ID" code="Code" description="Description"/>
    </profilelist>
  </Results>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "@s": "DEV07-WF01",
    "@lst": "10/5/2016 8:50:44 AM",
    "Results": {
      "profilelist": {
        "profile": {
          "@id": "ID",
          "@code": "Code",
          "@description": "Description"
        }
      }
    }
  }
}
```

Get Medications

Action: getehrmedications

Sample XML:

```
<ppmdmsg action='getehrmedications' class='api'
msgtime='7/1/2015 12:08:35 PM' patientid='57664'>

<drug patientid="PatientID" profilecode="ProfileCode"
drugname="DrugName" drugstrength="DrugStrength"
doseform="DoseForm" frequency="Frequency" />

</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrmedications ",
    "@class": "api",
    "@msgtime": "'7/1/2015 12:08:35 PM'",
    "@patientid": "57664",
    "drug": {
      "@patientid": "PatientID",
      "@profilecode": "ProfileCode",
      "@drugname": "DrugName",
      "@drugstrength": "DrugStrength"
      "@doseform": "DoseForm"
      "@frequency": "Frequency"
    }
  }
}
```

Attributes:

patientid: The unique ID of the patient whose medications you wish to retrieve. Generally, this will have been returned by a "getupdatedvisits" or "getdatevisit" request.

Results:

This request returns a <druglist> element or object that contains a list of all medications specific for the certain patient. Every returned element (<drug>) will contain an ID attribute.

Sample XML:

```
<PPMDResults>
  <Results servertime="2015-07-06T04:54:02.820"
drugcount="1">
    <druglist>
      <drug id="81379" patientid="57664" profilecode="KFDIME"
drugname="Marnatal-F" drugstrength="60 mg iron-1 mg"
doseform="capsule" frequency="QD" />
    </druglist>
  </Results>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "Results": {
      "drug": {
        "@patientid": "57664",
        "@profilecode": "KFDIME",
        "@drugname": "Marnatal-F",
        "@drugstrength": "60 mg iron-1 mg",
        "@doseform": "capsule",
        "@frequency": "QD",
        ...
      }
    }
  }
}
```

Get a List of Fields Available to "getehrmedications"

Action: getehrmedicationstemplate

Sample XML:

```
<ppmdmsg action="getehrmedicationstemplate" class="api"
msgtime="7/1/2015 12:08:35 PM"></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrmedicationstemplate",
    "@class": "api",
    "@msgtime": "7/1/2015 12:08:35 PM"
  }
}
```

Results:

This request returns a template that "getehrmedications" requests can be based on. It includes every optional field that is available for the <drug> elements. The following sample document is a very small subset of the fields actually returned.

Sample XML:

```
<PPMDResults>
  <Results>
    <drug id="[auto]" updatestatus="[auto]"
patientid="PatientID" profilecode="ProfileCode"
drugname="DrugName" drugstrength="DrugStrength"
doseform="DoseForm" frequency="Frequency" .../>
  </Results>
  <Error/>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMResults": {
    "Results": {
      "drug": {
        "@id": "[auto]",
        "@updatestatus": "[auto]",
        "@patientid": "PatientID",
        "@profilecode": "ProfileCode",
        "@drugname": "DrugName",
        "@drugstrength": "DrugStrength",
        "@doseform": "DoseForm",
        "@doseform": "DoseForm",
        ...
      },
    },
    "Error": null
  }
}
```

Get EHR Note Templates

Action: getehrnotestemplate

Sample XML:

```
<ppmdmsg action='getehrnotestemplate' class='api'
msgtime='7/1/2015 12:08:35 PM'>

</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrnotestemplate ",
    "@class": "api",
    "@msgtime": "'7/1/2015 12:08:35 PM'",
  }
}
```

Results:

This request returns a <patientnote>, <page>, <field> elements. Every returned element (<patientnote>, <page>, <field>) will contain an ID attribute.

Sample XML:

```
<PPMDResults>
<Results servertime="2015-07-06T04:54:02.820" drugcount="1">
<patientnote id="[auto]" templateid="TemplateID"
templatename="TemplateName" patientid="PatientID"
createdat="CreatedAt" notedatetime="NoteDatetime"
updatedatetime="UpdateDatetime" username="UserName"
comments="Comments" patientcomment="PatientComment"
confidential="Confidential" printedat="PrintedAt"
changedat="ChangedAt" signedbyuser="SignedByUser"
reviewedbyuser="ReviewedByUser" />
```

```

    <page id="[auto]" pageindex="PageIndex" pagename="PageName"
  />
    <field id="[auto]" ordinal="Ordinal" fieldname="FieldName"
  value="Value" createdat="CreatedAt" changedat="ChangedAt" />
  </Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "patientnote": {
        "@id": "[auto]",
        "@templateid": "TemplateName",
        "@patientid": "PatientID",
        "@createdat": "CreatedAt",
        ...
      },
      "page" {
        "@id": "[auto]",
        "@pageindex": "PageIndex",
        "@pagename": "PageName",
      },
      "field"{
        "@id": "[auto]",
        "@ordinal": "Ordinal",
        "@fieldname": "FieldName",
        "@value": "Value",
        "@createdat": "CreatedAt",
        "@changedat": "ChangedAt",
      }
    }
  }
}

```

}
}



Get EHR Templates

Action: getehrtemplates

Sample XML:

```
<ppmdmsg action="getehrtemplates" appttype="5 Year Visit"
class="api"
msgtime="10/22/2015 8:06:33 AM"><template
templatename="TemplateName"
templatetype="TemplateType" templatetypeid="TemplateTypeID"
defaultcategory="DefaultCategory"
defaultcategoryid="DefaultCategoryID"
isactive="IsActive" /><page pagename="PageName"
pageindex="PageIndex" />
<field ordinal="Ordinal" fieldname="FieldName" x="X" y="Y"
width="Width"
height="Height" font="Font" fontsize="FontSize"
maxlength="MaxLength"
defaultvalue="DefaultValue" /></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrtemplates",
    "@msgtime": "10/22/2015 8:06:33 AM",
    "@class": "api",
    "@appttype": "5 Year Visit",
    "template": {
      "@templatename": "TemplateName",
      "@isactive": "IsActive",
      "@defaultcategoryid": "DefaultCategoryID",
      "@defaultcategory": "DefaultCategory",
      "@templatetypeid": "TemplateTypeID",
      "@templatetype": "TemplateType"
    }
  },
}
```

```

    "page": {
      "@pagename": "PageName",
      "@pageindex": "PageIndex"
    },
    "field": {
      "@fieldname": "FieldName",
      "@ordinal": "Ordinal",
      "@defaultvalue": "DefaultValue",
      "@maxlength": "MaxLength",
      "@fontsize": "FontSize",
      "@font": "Font",
      "@height": "Height",
      "@width": "Width",
      "@y": "Y",
      "@x": "X"
    }
  }
}

```

Results:

This request returns a hierarchical <templatelist>, <pagelist> and <fieldlist> elements or objects that contains a list of all templates that are associated with the supplied appt type. Every returned element (<template>, <page> and <field>) will contain an ID attribute.

Sample XML:

```

<PPMDResults>
  <Results servertime="2015-12-14T07:42:54.080"
    templatecount="66">
    <templatelist>
      <template id="37" templatename="Office Visit -
        NoteExam" templatetype="xxxAMDS_General" templatetypeid="10"
        defaultcategory="" defaultcategoryid="" isactive="1">

```

```

        <pagelist>
<page id="1653" pagename="Vitals" pageindex="1">
    <fieldlist>
        <field id="67017" ordinal="3244" fieldname="Weight" x="80"
y="80" width="60" height="0" font="Arial" fontsize="12"
maxlength="0" defaultvalue="" />
        <field id="67018" ordinal="3259" fieldname="Temp" x="80"
y="140" width="60" height="0" font="Arial" fontsize="12"
maxlength="4000" defaultvalue="" />
    ...
    </fieldlist>
</page>
...
    </pagelist>
</template>
...
</templatelist >
</Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "templatelist": {
        "template": {
          "@id": "37",
          "@templatename": "Office Visit - NoteExam",
          "@templatetype": " xxxAMDS_General",
          "@templatetypeid": "10",
          "@defaultcategory": "",
          "@defaultcategoryid": "",
          "@isactive": "1",

```

```

...
    "pagelist": {
        "page": {
            "@id": "1653",
            "@pagename": " Vitals"
            "@pageindex": " 1"
        }
        ...
        "fieldlist": {
            "field": {
                "@id": "67017",
                "@ordinal": "3244",
                "@fieldname": "Weight",
                "@x": "80",
                "@y": "80",
                "@width": "60",
                "@height": "0",
                "@font": "Arial",
                "@fontsize": "12",
                "@maxlength": "0",
                "@defaultvalue": "",
                ...
            }
        }
    }
}
}
}
}
}
}
}
}

```

Get a List of Fields Available to "getehrtemplates"

Action: getehrtemplatestemplate

Sample XML:

```
<ppmdmsg action="getehrtemplatestemplate" class="api"
msgtime="7/1/2015 12:08:35 PM"></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrtemplatestemplate",
    "@class": "api",
    "@msgtime": "7/1/2015 12:08:35 PM"
  }
}
```

Results:

This request returns a template that "getehrtemplates" requests can be based on. It includes every optional field that is available for the <template> elements. The following sample document is a very small subset of the fields actually returned.

Sample XML:

```
<PPMDResults>
<Results>
<template id="[auto]" appttypeid="ApptTypeID"
templatename="TemplateName" templatetype="TemplateType"
templatetypeid="TemplateTypeID"
defaultcategory="DefaultCategory"
defaultcategoryid="DefaultCategoryID" outputtype="OutputType"
issubtemplate="IsSubtemplate" isactive="IsActive" />
```

```

    <page id="[auto]" pageindex="PageIndex" pagename="PageName"
  />

    <field id="[auto]" ordinal="Ordinal" fieldname="FieldName"
  x="X" y="Y" width="Width" height="Height" font="Font"
  fontsize="FontSize" maxlength="MaxLength"
  defaultvalue="DefaultValue" /> </Results>

  <Error/>

</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "template id": {
        "@id": "[auto]",
        "@appttypeid": "ApptTypeId",
        "@templatename": "TemplateName",
        "@templatetype": "TemplateType",
        "@templatetypeid": "TemplateTypeId",
        "@defaultcategory": "DefaultCategory",
        "@defaultcategoryid": "defaultcategoryid",
        "@outputtype": "OutputType",
        ...
      },
    },
    "Error": null
  }
}

```

Add a Patient Note

Action:addehrnote

Notes:

- *This section is broken out by field type.*
- *Each field type may have different attributes that need to be sent in order to satisfy the requirements of the call*
- *Each field on the template is treated as a separate item in the call*

Sample XML:

```
<ppmdmsg action="addehrnote" class="api" msgtime="12/14/2015
2:29:03 AM"
templatename="Office Visit - NoteExam" visitid="313387"
profileid="3"
notedatetime="7/30/2015 3:36:37 AM" patientid="3693"
comments="Test-Insert
10/13"><pagelist><page pageindex="1" pagename="Test-
Page"><fieldlist>
```

Text Box

```
<field pageindex="1" ordinal="2" fieldname="TextBox"
requiredflag="0"
enabledflag="-1" type="1" value="New TextBox"/>
```

Date Time

```
<field pageindex="1" ordinal="3" fieldname="DateTime"
requiredflag="0"
enabledflag="-1" type="2" value="1/4/2017" />
```

style="0" 0 = date only , 1 = time only, 2 = date and time

Check Box

```
<field pageIndex="1" ordinal="5" fieldname="Checkbox"
requiredflag="0"
enabledflag="-1" type="3" value="1" />
```

style="1" where 0 single checkbox 1= double checkbox value ="" 0 = unchecked, 1- first checked, 2-if style 1 then 2nd checked

DropDown

```
<field pageIndex="1" ordinal="6" fieldname="Dropdown"
requiredflag="0"
enabledflag="-1" type="4" lst= "1abc|2abc|3abc|4abc"
value="2abc"/>
```

lst defines the options in dropdown and value defines selected item

Multiselect

```
<field pageIndex="1" ordinal="7" fieldname="MultiSelect"
requiredflag="0" enabledflag="-1" type="5" lst="a|b|c|d"
value="a, b, c"/>
```

lst defines options in dropdown and value defines items selected and style= "" from 0 to 5 defines a separator used between multiselect options (in this case default - comma)

Multiselct with ICD

```
<field pageIndex="1" ordinal="8"
```

```
fieldname="MultiselectwithICD"
requiredflag="0" enabledflag="-1" type="5"lst="1|2|3|4"
value="1, 2"
icd="-1" />
```

lst defines options in dropdown and value defines items selected and style= "" from 0 to 5 defines a separator used between multiselect options (in this case default - comma)

EMCoder

```
<field pageindex="1" ordinal="11" fieldname="EMCoder"
requiredflag="0"
enabledflag="-1" type="8" value="New EMCoder" />
```

To define checked radio button value should be in format value="new EMCoder|0|2|1|3" 0 - selects in first line radio button 1, 2- selectes second row 3d radio button ,1- selectd 4th row and 2nd row, 3 selects 3rd row and last radio button

CPT Selector

```
<field pageindex="1" ordinal="12" fieldname="CPTSelector"
requiredflag="0" enabledflag="-1" type="10" value="New CPT
selector" />
```

Options Group

```
<field pageindex="1" ordinal="14" fieldname="Optionsgroup"
requiredflag="0" enabledflag="-1" type="9"
lst="option1|option2|option3"
value="1" /
```

Value = should be from 0 to 2 in this case which is the index of the option selected

Example XML:

```
<ppmdmsg action="addehrnote" class="api" msgtime="12/14/2015
2:29:03 AM"
templatename="Office Visit - NoteExam" visitid="313387"
profileid="3"
notedatetime="7/30/2015 3:36:37 AM" patientid="3693"
comments="Test-Insert 10/13">
  <pagelist>
    <page pageindex="1" pagename="Test-Page">
      <fieldlist>
        <field pageindex="1"
ordinal="7777" fieldname="Pulse" value="Test-ValuePulse"
requiredflag="0"
enabledflag="-1" />
        <field pageindex="1" ordinal="7778"
fieldname="BMI"
value="Test-ValueBMI" requiredflag="0" enabledflag="-1"
type="1" />
      </fieldlist>
    </page>
    <page pageindex="2" pagename="Test-Page-2">
      <fieldlist>
        <field pageindex="2" ordinal="7780"
fieldname="Pulse"
value="Test-ValuePulse" requiredflag="0" enabledflag="-1"
type="1"/>
        <field pageindex="2" ordinal="7781"
fieldname="BMI" value="Test-ValueBMI"
requiredflag="0" enabledflag="-1" type="9"
        </fieldlist>
      </page>
    </pagelist>
  </ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@comments": "Test-Insert 10/13",
    "@action": "addehrnote",
    "@patientid": "3693",
    "@notedatetime": "7/30/2016 3:36:37 AM",
    "@profileid": "3",
    "@visitid": "313387",
    "@templatename": "Office Visit - NoteExam",
    "@msgtime": "12/14/2016 2:29:03 AM",
    "@class": "api",
    "pagelist": {
      "page": [
        {
          "@pagename": "Test-Page",
          "@pageindex": "1",
          "fieldlist": {
            "field": [
              {
                "@pageindex": "1",
                "@enabledflag": "-1",
                "@type": "1",
                "@requiredflag": "0",
                "@value": "Test-ValuePulse",
                "@fieldname": "Pulse",
                "@ordinal": "7777"
              },
              {
                "@pageindex": "1",
                "@enabledflag": "-1",
                "@type": "1",
                "@requiredflag": "0",
                "@value": "Test-ValueBMI",
```

```

        "@fieldname": "BMI",
        "@ordinal": "7778"
    }
]
}
},
{
    "@pagename": "Test-Page-2",
    "@pageindex": "2",
    "fieldlist": {
        "field": [
            {
                "@pageindex": "2",
                "@enabledflag": "-1",
                "@type": "1",
                "@requiredflag": "0",
                "@value": "Test-ValuePulse",
                "@fieldname": "Pulse",
                "@ordinal": "7780"
            },
            {
                "@pageindex": "2",
                "@enabledflag": "-1",
                "@requiredflag": "0",
                "@value": "Test-ValueBMI",
                "@fieldname": "BMI",
                "@ordinal": "7781"
            }
        ],
        "@x": "50",
        "@y": "1650",
        "@width": "240"
    }
]
}
}

```

```

    ]
  }
}
}
}
}
}

```

Results:

This action returns attributes id and openedat in <PPMDResults> element. That is the ID and creation datetime of the newly added Patient Note.

Sample XML:

```

<PPMDResults s="SOFTSERVE001" lst="12/14/2015 2:45:36 AM"
n="1">
  <Results id="44621" createdate="2015-12-14T02:45:37.450" />
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "@n": "1",
    "@lst": "12/14/2015 2:45:36 AM",
    "@s": "SOFTSERVE001",
    "Results": {
      "@createdate": "2015-12-14T02:45:37.450",
      "@id": "44621"
    }
  }
}

```


Notes:

- *When creating a patient note, you must send all the fields that are in the template, even if they are blank. Failure to do so will result in the excluded fields not showing up in the user interface for that note.*
- *If the field exists on the template and x, y, width, height, font, or font-size parameters are applied in the call, they will be ignored.*
- *If there is a field with fieldname specified that is not a part of template, it will add it to the note and will show in the UI with default position and sizing unless its x, y, height, and width is set. Default positioning may overlay another field. It is recommended to not send fields that are not part of the original template. If you need to do this, be sure to specify the x, y, height, width, and font attributes.*

Default Positioning:

@X int = 10

@Y int = 10

@WIDTH int = 200

@HEIGHT int = 100

@FONTFAMILY varchar(40) = 'Arial',

@FONTSIZE int = 10

Attributes applicable for adding the patient note:

- templateid: (Optional) This is the Template ID of the patient note
- templatename: (Required) This is the Template Name of the patient note
- patientid: (Required) This is the Patient ID
- type: (Optional) This is the Field Type (see hard coded lists)
- visitid: (Optional) This is the Visit ID

- profileid: (Optional) This is the Profile ID
- departmentid: (Optional) This is the Department ID
- categoryid: (Optional) This is the Category ID
- notatetime: (Required) This is the Note Date
- comments: (Optional) This is the Comments
- minutes: (Optional) This is the minutes
- hold: (Optional) This is the Hold Flag
- assistant: (Optional) This is the Assistant
- confidential: (Optional) This is the Confidential

Attributes applicable for adding the patient note control:

- ordinal: (Optional) This is the Patient Note Control Ordinal
- templateid: (Optional) This is the template ID
- templatefieldid: (Optional, defaulted from the template) This is the Template Field ID
- description: (Optional) This is the Description
- pageindex: (Optional) This is the Page Index
- x: (Optional, defaulted from the template) This is the Left Location
- y: (Optional, defaulted from the template) This is the Top Location
- width: (Optional, defaulted from the template) This is the Width
- height: (Optional, defaulted from the template) This is the Height
- fontfamily: (Optional, defaulted from the template) This is the font family
- fontsize: (Optional, defaulted from the template) This is the font size
- fontprops: (Optional) This is the Font properties
- lst: (Optional) This is the List
- lstsql: (Optional) This is the ListSql
- prtfmt: (Optional) PrintFormat
- fmtdfmt: (Optional) FormatForDefault
- max: (Optional) MaxLen
- style: (Optional) Style
- em: (Optional) EMSysystemID
- emnum: (Optional) EMNumber

- `encount:` (Optional) EMCount
- `requiredflag:` (Optional) RequiredFlag
- `enabledflag:` (Optional) EnabledFlag
- `type:` (Required) Field Type (see hard coded lists)
- `prnt:` (Optional) ParentOrdinal
- `prntindex:` (Optional) ParentIndex
- `dfltval:` (Optional) DefaultValue
- `dfltblob:` (Optional) DefaultBlob
- `value:` (Optional) Value
- `blob:` (Optional) Blob
- `icd:` (Optional) ICDFlag
- `jumpto:` (Optional) JumpToFlag
- `fillfrom:` (Optional) FillFromFieldID
- `assoccpt:` (Optional) Assoc_CPT
- `associcd:` (Optional) Assoc_ICD
- `codesettypeid:` (Optional) CodesetTypeFID
- `codesetreadonly:` (Optional) CodesetReadOnly
- `codesetdefault:` (Optional) CodesetDefaultValue
- `codesetlist:` (Optional) CodesetList
- `codesetvalue:` (Optional) CodesetValue

Add Patient Notes by Visit

Action:addehrnotebyvisit

Sample XML:

```
<ppmdmsg action="addehrnotebyvisit" class="api"
msgtime="10/5/2016 1:32:27 PM" templatename="Office Visit -
NoteExam"
visitid="313387" profileid="3" notedatetime="7/30/2015 3:36:37
AM"
patientid="3693" comments="Test-Insert 10/13"><pagelist><page
pageindex="1" pagename="Test-Page"><fieldlist><field
pageindex="1"
ordinal="7777" fieldname="Pulse" value="Test-Value"
requiredflag="0"
enabledflag="-1" /></fieldlist></page></pagelist></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "addehrnotebyvisit ",
    "@class": "api",
    "@msgtime": "10/5/2016 1:32:27 PM",
    "@templatename": "Office Visit - NoteExam",
    "@visitid": "313387",
    "@profileid": "3",
    "@notedatetime": "7/30/2015 3:36:37 AM",
    "@patientid": "3693",
    "@comments": "Test-Insert 10/13",
    "pagelist": {
      "page": {
        "@pageindex": "1",
        "@pagename": "Test-Page",
        "fieldlist": {
```

```

        "field":{
            "@pageindex":"1",
            "@ordinal":"7777",
            "@fieldname":"",
            "@value":"Test-Value",
            "@requiredflag":"0",
            "@enabledflag":"-1"
        },
    },
}
}

```

Results:

This action returns id of created node by visit, in <PPMDResults> element.

Sample XML:

```

<PPMDResults s="DEV07-WF01" lst="10/5/2016 7:05:18 AM">
  <Results id="44644" createdate="2016-10-05T07:05:18.517" />
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "@s": "DEV07-WF01",
    "@lst": "10/5/2016 7:05:18 AM",
    "Results": {
      "@id": "44644",
      "@createdate": "2016-10-05T07:05:18.517"
    }
  }
}

```

}
}
}

Get Patient Notes by Visit

Action: getehrnotesbyvisit

Sample XML:

```
<ppmdmsg action="getehrnotesbyvisit" class="api"
msgtime="12/14/2015 2:29:03 AM"
visitid="11163"><patientnote patientid="PatientID"
templateid="TemplateID"
username="UserName" notedatetime="NoteDatetime"
comments="Comments"
patientcomment="PatientComment" createdat="CreatedAt" /><page
pagename="PageName" />
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrnotesbyvisit",
    "@visitid": "11163",
    "@msgtime": "12/14/2015 2:29:03 AM",
    "@class": "api",
    "patientnote": {
      "@comments": "Comments",
      "@patientid": "PatientID",
      "@notedatetime": "NoteDatetime",
      "@createdat": "CreatedAt",
      "@patientcomment": "PatientComment",
      "@username": "UserName",
      "@templateid": "TemplateID"
    },
    "page": {
      "@pagename": "PageName"
    },
  },
}
```

```

    "field": {
      "@value": "Value",
      "@ordinal": "Ordinal",
      "@name": "FieldName"
    }
  }
}

```

Attributes:

visitid: The visit ID.

Results:

This request returns a hierarchical <patientnotelist>, <pagelist> and <fieldlist> elements or objects that contains a list of all patient notes specific for the certain visit. Every returned element (<patient>, <page> and <field>) will contain an ID attribute.

Sample XML:

```

<PPMDResults>
  <Results servertime="2015-12-15T06:18:58.317"
    patientnotecount="3">
    <patientnotelist>
      <patientnote id="18771" patientid="2716" templateid="82"
        username="ABIODUN BALOGUN" notedatetime="2011-04-12T08:24:41"
        comments="" patientcomment="" createdat="2012-05-
        28T08:23:50.700">
      <pagelist>
        <page id="396172" pagename="Vitals">
          <fieldlist>
            <field id="5253327" ordinal="3192" name="Weight"
              value="17.6" />
            <field id="5253331" ordinal="3197" name="Pwt"
              value="" />
          </fieldlist>
        </page>
      </patientnote>
    </patientnotelist>
  </Results>
</PPMDResults>

```

```

...
        </fieldlist>
    </page>
...
    </pagelist>
    </patientnote>
    ...
    </patientnotelist>
</Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "patientnotelist": {
        "patientnote": {
          "@id": "26791",
          "@templatename": " xNurse Visit ",
          "@notedatettime": "2012-10-05T12:38:39",
          "@username": "DIANA CLAVIN",
          ...
        }
      }
      "pagelist": {
        "page": {
          "@id": "631657",
          "@pagename": " Vitals"
          ...
        }
      }
      "fieldlist": {
        "field": {
          "@id": "1",
          "@ordinal": "1",
          "@name": "Vitals_Age",

```

```
    "@value": "50",  
    ...  
    }  
    }  
    }  
    }  
    }  
    }  
    }  
    }  
    }
```

Get New and Modified Patient Notes

Action: getehrupdatednotes

Sample XML:

```
<ppmdmsg action="getehrupdatednotes" class="api"
msgtime="7/23/2015
8:20:09 AM" templateid="549" datechanged="2/20/2015 9:00:55
AM">
<patientnote templatename='TemplateName'
notedatetime="NoteDatetime"
username="UserName" /><page pagename="PageName" /><field
ordinal="Ordinal"
name="FieldName" value="Value" /></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrupdatednotes",
    "@class": "api",
    "@msgtime": "7/1/2015 12:08:35 PM",
    "@templateid": "549",
    "@datechanged": "2/20/2015 9:00:55 AM",
  },
  "patientnote": {
    "@templatename": "TemplateName",
    "@notedatetime": "NoteDatetime",
    "@username": "UserName"
  },
  "page": {
    "@pagename": "PageName"
  },
  "field": {
    "@ordinal": "Ordinal",
    "@name": "FieldName",
  },
}
```

```

        "@value": "Value"
      }
    }
  }

```

Attributes:

templateid: The unique ID of the template which notes you wish to retrieve.

ortemplatename: The name of the desired template can optionally be supplied instead of the templateid.

datechanged: Any notes (for any patients) that have been added or modified since this date/time will be returned.

pagename: If you would like to restrict your results to changes made to a specific page on the template, supply the name of the page.

fieldname: If you would like to restrict your results to changes made to a specific control on a page, supply the name of the page (using the pageid attribute) and the Field Name associated with the control.

Best practice: To optimize performance of the getehrupdatednotes action, specify a pagename and fieldname, if possible.

Results:

This request returns a hierarchical <patientnotelist>, <pagelist> and <fieldlist> elements or objects that contain a list of all added or updated patient notes since the specific date and for the certain template. Every returned element (<patient>, <page> and <field>) will contain an ID attribute.

Sample XML:

```

<PPMDResults>
  <Results servertime="2015-07-07T02:22:42.603"
    patientnotecount="13">

```

```

    <patientnotelist>
      <patientnote id="37615" templatename="OB Record"
notedatetime="2015-02-22T08:43:09" username="DIANA CLAVIN">
        <pagelist>
          <page id="969369" pagename="1">
            <fieldlist>
              <field id="575" ordinal="575" name="OB_
ReligiousConsiderations_Comments" value="" />
              <field id="583" ordinal="583" name="OB_
AnesthesiaConsult_Comments" value="No" />
            ...
          </fieldlist>
        </page>
      ...
    </pagelist>
  </patientnote >
  ...
</patientnotelist>
</Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "patientnotelist": {
        "patientnote": {
          "@id": "37615",
          "@templatename": "OB Record",
          "@notedatetime": "2015-02-22T08:43:09",
          "@username": "DIANA CLAVIN",
          ...
        "pagelist": {

```

```

    "page": {
      "@id": "969369",
      "@pagename": "1"
    },
    ...
    "fieldlist": {
      "field": {
        "@id": "575",
        "@ordinal": "575",
        "@name": " OB_AnesthesiaConsult_Comments ",
        "@value": "",
        ...
      }
    }
  }
}

```

Update a Patient Note

Action:updateehrnote

Sample XML:

```
<ppmdmsg action="updateehrnote" class="api"
msgtime="12/14/2016 2:29:03 AM"
  id="44621" templatename="Office Visit - NoteExam"
  visitid="313387" profileid="3"
  notedatetime="7/30/2016 3:36:37 AM" patientid="3693"
  comments="Test-Insert 10/13">
  <pagelist>
    <page pageindex="1" pagename="Test-Page">
      <fieldlist>
        <field pageindex="1" ordinal="7777" type="1"
value="Test-ValuePulseX" />
        <field pageindex="1" ordinal="7778"
value="Test-ValueBMI" />
      </fieldlist>
    </page>
    <page pageindex="2" pagename="Test-Page-2">
      <fieldlist>
        <field pageindex="2" ordinal="7780" type = "1"
value="Test-ValuePulse" />
        <field pageindex="2" ordinal="7781"
value="Test-ValueBMIX" />
      </fieldlist>
    </page>
  </pagelist>
</ppmdmsg>
```

Sample JSON:

```
{
```

```

"ppmdmsg": {
  "@comments": "Test-Insert 10/13",
  "@action": "updateehrnote",
  "@patientid": "3693",
  "@notedatetime": "7/30/2016 3:36:37 AM",
  "@profileid": "3",
  "@visitid": "313387",
  "@templatename": "Office Visit - NoteExam",
  "@msgtime": "12/14/2015 2:29:03 AM",
  "@class": "api",
  "@id": "44621",
  "pagelist": {
    "page": [
      {
        "@pagename": "Test-Page",
        "@pageindex": "1",
        "fieldlist": {
          "field": [
            {
              "@pageindex": "1",
              "@value": "Test-ValuePulseX",
              "@ordinal": "7777",
              "@type": "1"
            },
            {
              "@pageindex": "1",
              "@value": "Test-ValueBMI",
              "@ordinal": "7778"
            }
          ]
        }
      }
    ],
    {
      "@pagename": "Test-Page-2",

```



```

        "@pageindex": "2",
        "fieldlist": {
            "field": [
                {
                    "@pageindex": "2",
                    "@value": "Test-ValuePulse",
                    "@ordinal": "7780",
                    "@type": "1"
                },
                {
                    "@pageindex": "2",
                    "@value": "Test-ValueBMIX",
                    "@ordinal": "7781"
                }
            ]
        }
    ]
}
}
}

```

Results:

This action returns attributes id and openedat in <PPMDResults> element. That is the ID and updated datetime of the Patient Note.

Sample XML:

```

<PPMDResults s="SOFTSERVE001" lst="12/14/2015 6:56:06 AM"
n="1">
    <Results id="44621" createdate="2015-12-14T06:56:08.243" />
</PPMDResults>

```

Sample JSON:

```
{
  "PPMDResults": {
    "@n": "1",
    "@lst": "12/14/2015 6:56:06 AM",
    "@s": "SOFTSERVE001",
    "Results": {
      "@createdate": "2015-12-14T06:56:08.243",
      "@id": "44621"
    }
  }
}
```

Notes:

The list of attributes for the updating patient notes and patient note controls is the same as for adding except Patient Note ID must be specified.

- *id:(Required) Patient Note ID*

The list of patient note columns that can be modified:

- *ProfileFID*
- *DepartmentFID*
- *CategoryFID*
- *Note_Datetime*
- *Comments*
- *Notemin*
- *Hold_Flag*
- *Assistant*
- *Confidential*

- *Update_Datetime*
- *UserFID*
- *ChangedBy*
- *ChangedAt*

The list of patient note control columns that can be modified:

- *Data_Value*
- *Update_Datetime*
- *UpdateUserFID*
- *Data_Blob*
- *ChangedBy*
- *ChangedAt*
- *CodesetValue*

Get a List of Fields Available to "getehrnotes"

Action: getehrnotestemplate

Sample XML:

```
<ppmdmsg action='getehrnotestemplate' class='api'
msgtime='7/24/2015 11:58:56 AM'></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrnotestemplate",
    "@class": "api",
    "@msgtime": "7/24/2015 11:58:56 AM"
  }
}
```

Results:

This request returns a template that "getehrnotes" request can be based on. It includes every optional field that is available for the <patientnote>, <page> and <field> elements. The following sample document is a set of the fields actually returned.

Sample XML:

```
<PPMDResults>
  <Results>
    <patientnote id="[auto]" templateid="TemplateID"
    templatename="TemplateName" patientid="PatientID"
    createdat="CreatedAt" notedatetime="NoteDatetime"
    updatedatetime="UpdateDatetime" username="UserName"
    comments="Comments" patientcomment="PatientComment"
```

```

confidential="Confidential" printedat="PrintedAt"
changedat="ChangedAt" signedbyuser="SignedByUser"
reviewedbyuser="ReviewedByUser" />

    <page id="[auto]" pageindex="PageIndex"
pagename="PageName" patientnoteid="PatientNoteID"
patientid="PatientID" templateid="TemplateID"
createdat="CreatedAt" changedat="ChangedAt" />

    <field id="[auto]" patientnoteid="PatientNoteID"
patientid="PatientID" templateid="TemplateID"
pageindex="PageIndex" fieldname="FieldName" value="Value"
createdat="CreatedAt" changedat="ChangedAt" />

</Results>

<Error/>

</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "patientnote": {
        "@id": "[auto]",
        "@templateid": "TemplateID",
        "@templatename": "TemplateName ",
        "@patientid": "PatientID",
        "@createdat": "CreatedAt",
        "@notedatettime": "NoteDatettime",
        "@updatedatettime": "UpdateDatettime",
        "@username": "UserName",
        "@comments": "Comments",
        "@patientcomment": "PatientComment",
        "@confidential": "Confidential",
        "@printedat": "PrintedAt",
        "@changedat": "ChangedAt",
        "@signedbyuser": "SignedByUser",
        "@reviewedbyuser": "ReviewedByUser"
      }
    }
  }
}

```

```

    },
    "page": {
      "@id": "[auto]",
      "@pageindex": "PageIndex",
      "@pagename": "PageName",
      "@patientnoteid": "PatientNoteId",
      "@patientid": "PatientId",
      "@templateid": "TemplateId",
      "@createdat": "CreatedAt",
      "@changedat": "ChangedAt"
    },
    "field": {
      "@id": "[auto]",
      "@patientnoteid": "patientnoteid",
      "@patientid": "PatientId",
      "@templateid": "TemplateId",
      "@pageindex": "PageIndex",
      "@fieldname": "FieldName",
      "@value": "Value",
      "@createdat": "CreatedAt",
      "@changedat": "ChangedAt"
    }
  },
  "Error": null
}

```

Get Immunizations

Action: getehrimmunizations

Sample XML:

```
<ppmdmsg action="getehrimmunizations" class="api"
msgtime="7/1/2015 12:08:35 PM"
patientid="4"><immunization immunization="Immunization"
groupname="GroupName"
dose="Dose" units="Units" amount="Amount" site="Site"
manufacturer="Manufacturer"
procedurecode="ProcedureCode" proceduredesc="ProcedureDesc"
immunitydescription="ImmunityDescription" />
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrimmunizations",
    "@class": "api",
    "@msgtime": "'7/1/2015 12:08:35 PM",
    "@patientid": "4",
    "immunization": {
      "@immunization": "Immunization",
      "@groupname": "GroupName",
      "@dose": "Dose",
      "@units": "Units",
      "@amount": "Amount",
      "@site": "Site",
      "@manufacturer": "Manufacturer",
      "@procedurecode": "ProcedureCode",
      "@proceduredesc": "ProcedureDesc",
      "@immunitydescription": "ImmunityDescription"
    }
  }
}
```

```
}  
}
```

Attributes:

patientid: The unique ID of the patient whose immunizations you wish to retrieve. Generally, this will have been returned by a "getupdatedvisits" or "getdatevisit" request.

Results:

This request returns a <immunizationlist> element or object that contains a list of all immunizations specific for the certain patient. Every returned element (<immunization>) will contain an ID attribute.

Sample XML:

```
<PPMDResults>  
  <Results servertime="2015-07-07T10:14:00.100"  
immunizationcount="1">  
    <immunizationlist>  
      <immunization id="548" immunization="Influenza"  
groupname="Influenza" dose="" units="ml" amount="0.50000"  
site="LD" manufacturer="sanofi pasteur" procedurecode=""  
proceduredesc="" immunitydescription="" />  
    </immunizationlist>  
  </Results>  
</PPMDResults>
```

Sample JSON:

```
{  
  "PPMDResults": {  
    "Results": {
```



```
"immunization": {
  "@id": "548",
  "@immunization": "Influenza",
  "@groupname": "Influenza",
  "@dose": "",
  "@units": "ml",
  "@amount": "0.50000",
  "@site": "LD",
  "@manufacturer": "sanofi pasteur",
  "@procedurecode": "",
  "@proceduredesc": "",
  "@immunitydescription": "",
  ...
}
}
}
}
```

Get a List of Fields Available to "getehrimmunizations"

Action: getehrimmunizationstemplate

Sample XML:

```
<ppmdmsg action="getehrimmunizationstemplate" class="api"
msgtime="7/1/2015 12:08:35 PM"></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrimmunizationstemplate",
    "@class": "api",
    "@msgtime": "7/1/2015 12:08:35 PM"
  }
}
```

Results:

This request returns a template that "getehrimmunizations" requests can be based on. It includes every optional field that is available for the <immunization> elements. The following sample document is a very small subset of the fields actually returned.

Sample XML:

```
<PPMDResults>
  <Results>
    <immunization id="[auto]" updatestatus="[auto]"
patientid="PatientID" immunization="Immunization"
groupname="GroupName" dose="Dose" units="Units"
amount="Amount" .../>
```

```
</Results>
<Error/>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "Results": {
      "immunization": {
        "@id": "[auto]",
        "@updatestatus": "[auto]",
        "@patientid": "PatientID",
        "@immunization": "Immunization",
        "@groupname": "GroupName",
        "@dose": "Dose",
        "@units": "Units",
        "@amount": "Amount",
        ...
      },
    },
    "Error": null
  }
}
```

Get Lab Results

Action: getehrlabresults

Sample XML:

```
<ppmdmsg action="getehrlabresults" class="api"
msgtime="7/1/2015 12:08:35 PM"
patientid="4"><labresult profileid="ProfileID"
companyname="CompanyName"
obsdatetime="ObsDatetime" specdatetime="SpecDatetime"
signby="SignBy"
signat="SignAt" resultcode="ResultCode"
resultdesc="ResultDesc"
resultvalue="ResultValue" resultunits="ResultUnits"
resultrange="ResultRange"
resultstatus="ResultStatus" /></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrlabresults",
    "@class": "api",
    "@msgtime": "7/1/2015 12:08:35 PM",
    "@patientid": "4",
  },
  "labresult": {
    "@profileid": "ProfileID",
    "@companyname": "CompanyName",
    "@obsdatetime": "ObsDatetime",
    "@specdatetime": "SpecDatetime",
    "@signby": "SignBy",
    "@signat": "SignAt",
    "@resultcode": "ResultCode",
    "@resultdesc": "ResultDes ",
    "@resultvalue": "ResultValue",
    "@resultunits": "ResultUnits",
  }
}
```

```

    "@resultrange": "ResultRange",
    "@resultstatus": "ResultStatus"
  }
}
}

```

Attributes:

patientid: The unique ID of the patient whose labresults you wish to retrieve. Generally, this will have been returned by a "getupdatedvisits" or "getdatevisit" request.

Results:

This request returns a <labresultlist> element or object that contains a list of all immunizations specific for the certain patient. Every returned element (<labresult>) will contain an ID attribute.

Sample XML:

```

<PPMDResults>
  <Results servertime="2015-07-08T03:38:26.200"
    labresultcount="1">
    <labresultlist>
      <labresult id="7127" profileid="7" companyname="Labcorp"
        obsdatetime="2011-12-02T15:18:00" specdatetime="2011-12-
        02T21:14:00" signby="" signat="" resultcode="015065"
        resultdesc="MCV" resultvalue="100" resultunits="fL"
        resultrange="80-98" resultstatus="F" />
    </labresultlist>
  </Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "labresult": {
        "@profileid ":"7",
        "@companyname ":" Labcorp ",
        "@obsdatetime":"2011-12-02T15:18:00",
        "@specdatetime":"2011-12-02T21:14:00",
        "@signby":"",
        "@signat":"",
        "@resultcode":"015065",
        "@resultdesc":" MCV ",
        "@resultvalue":"100",
        "@resultunits":"fL",
        "@resultrange":"80-98",
        "@resultstatus":"F",
        ...
      }
    }
  }
}

```

Get Updated EHR Lab Results

Action: getupdatedehrlabresults

Sample XML:

```
<ppmdmsg
  action="getupdatedehrlabresults"
  class="api"
  msgtime="7/1/2015 12:08:35 PM"
  patientid="4"
>
  <labresult
    profileid="ProfileID"
    companyname="CompanyName"
    obsdatetime="ObsDatetime"
    specdatetime="SpecDatetime"
    signby="SignBy"
    signat="SignAt"
    resultcode="ResultCode"
    resultdesc="ResultDesc"
    resultvalue="ResultValue"
    resultunits="ResultUnits"
    resultrange="ResultRange"
    resultstatus="ResultStatus"
  />
</ppmdmsg>;
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrlabresults",
    "@class": "api",
```

```

"@msgtime": "7/1/2015 12:08:35 PM",
"@patientid": "4",
"labresult": {
  "@profileid": "ProfileID",
  "@companyname": "CompanyName",
  "@obsdatetime": "ObsDatetime",
  "@specdatetime": "SpecDatetime",
  "@signby": "SignBy",
  "@signat": "SignAt",
  "@resultcode": "ResultCode",
  "@resultdesc": "ResultDes ",
  "@resultvalue": "ResultValue",
  "@resultunits": "ResultUnits",
  "@resultrange": "ResultRange",
  "@resultstatus": "ResultStatus"
}
}
}

```

Attributes:

patientid – The unique ID of the patient whose updated lab results you wish to retrieve. Generally, this will have been returned by a "getupdatedvisits" or "getdatevisit" request.

Results:

This request returns a <labresultlist> element or object that contains a list of all immunizations specific for the certain patient. Every returned element (<labresult>) will contain an ID attribute.

Sample XML:

```

<PPMDResults>
  <Results servertime="2015-07-08T03:38:26.200"
labresultcount="1">
    <labresultlist>
      <labresult id="7127" profileid="7"
companyname="Labcorp" obsdatetime="2011-12-02T15:18:00"
specdatetime="2011-12-02T21:14:00" signby="" signat=""
resultcode="015065" resultdesc="MCV" resultvalue="100"
resultunits="fL" resultrange="80-98" resultstatus="F" />
    </labresultlist>
  </Results>
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "labresult": {
        "@profileid ": "7",
        "@companyname ": " Labcorp ",
        "@obsdatetime": "2011-12-02T15:18:00",
        "@specdatetime": "2011-12-02T21:14:00",
        "@signby": "",
        "@signat": "",
        "@resultcode": "015065",
        "@resultdesc": " MCV ",
        "@resultvalue": "100",
        "@resultunits": "fL",
        "@resultrange": "80-98",
        "@resultstatus": "F",
        ...
      }
    }
  }
}

```

}
}



Get a List of Fields Available to "getehrlabresults"

Action: getehrlabresultstemplate

Sample XML:

```
<ppmdmsg action=" getehrlabresultstemplate" class="api"
msgtime="7/1/2015 12:08:35 PM"></ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrlabresultstemplate",
    "@class": "api",
    "@msgtime": "7/1/2015 12:08:35 PM"
  }
}
```

Results:

This request returns a template that "getehrlabresults" requests can be based on. It includes every optional field that is available for the <labresult> elements. The following sample document is a very small subset of the fields actually returned.

Sample XML:

```
<PPMDResults>
  <Results>
    <labresult id="[auto]" updatestatus="[auto]"
patientid="PatientID" profileid="ProfileID"
companyname="CompanyName" obsdatetime="ObsDatetime"
specdatetime="SpecDatetime" signby="SignBy" ... />
  </Results>
```

```
<Error/>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "Results": {
      "labresult": {
        "@id": "[auto]",
        "@updatestatus": "[auto]",
        "@patientid": "PatientID",
        "@profileid": "ProfileID",
        "@companyname": "CompanyName",
        "@obsdatetime": "ObsDatetime",
        "@specdatetime": "SpecDatetime",
        "@signby": "SignBy",
        ...
      },
    },
    "Error": null
  }
}
```

Add Health Watcher Plans

Action: addehrhwplans

Sample XML:

```
<ppmdmsg
  action="addehrhwplan"
  class="api"
  msgtime="6/7/2016 6:28:09 PM"
  templateid="1"
>
  <hmpplanlist>
    <hmpplan
      Title="TestTitle90"
      Item_Type="Appointment"
      Text="Have you scheduled a 90 test?"
      ApptTypeFID="7"
      Autocreateflag="0"
      Autoinprogressflag="0"
      Autocompleteflag="0"
      Start_Num="0"
      Start_Var="Days"
      Frequency_Num="90"
      Frequency_Var="Days"
      Numtimes="0"
    />
  </hmpplanlist>
</ppmdmsg>;
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "addehrhwplan",
```

```

"@class": "api",
"@msgtime": "6/7/2016 6:28:09 PM",
"@templateid": "1",
"hmplanlist": {
  "hmplan": {
    "@Title": "TestTitle90",
    "@Item_Type": "Appointment",
    "@Text": "Have you scheduled a 90 test?",
    "@ApptTypeFID": "7",
    "@Autocreateflag": "0",
    "@Autoinprogressflag": "0",
    "@Autocompleteflag": "0",
    "@Start_Num": "0",
    "@Start_Var": "Days",
    "@Frequency_Num": "90",
    "@Frequency_Var": "Days",
    "@Numtimes": "0"
  }
}
}
}

```

Attributes:

templateid: The ID of the template that will be used to create hwplan.

Hmplanlist: Node which contains all of the fields needed to create hwplan. There can be multiple instances of hmplan inside.

Results:

This action returns a success="1" if hwplans were created without any errors.

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="DEV07-WF01" lst="6/8/2016 3:04:00 AM">
  <Results success="1" createdate="2016-06-08T03:04:00.630" />
</PPMDResults>;
```

Sample JSON:

```
{
  "PPMDResults": {
    "@s": "DEV07-WF01",
    "@lst": "6/8/2016 3:04:00 AM",
    "Results": {
      "@success": "1",
      "@createdate": "2016-06-08T03:04:00.630"
    }
  }
}
```

Get Health Watcher Plans

Action: getehrhplans

Sample XML:

```
<PPMDResults s="DEV07-WF01" lst="6/8/2016 3:04:00 AM">
  <Results success="1" createdate="2016-06-08T03:04:00.630" />
</PPMDResults>;
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrhplans",
    "@class": "api",
    "@msgtime": "6/7/2016 6:28:09 PM",
    "@patientid": "1860",
    "hmitem": {
      "@titile": "Title",
      "@itemtype": "Item_Type",
      "@text": "Text"
    }
  }
}
```

Attributes:

patientid: The unique ID of the patient whose health watcher plans you wish to retrieve.

hmitem: XML node which contain all fields that you will get.

Results:

This request returns a < itemlist> element or object that contains a list of all health watcher plans specific for the certain patient. Every returned element (<itemlist>) will contain an ID attribute.

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="DEV07-WF01" lst="6/8/2016 2:49:28 AM">
  <Results servertime="2016-06-08T02:49:28.237"
    itemscount="18">
    <itemlist>
      <item id="1860" titile="Eye Exam" itemtype="Order"
        text="" />
      <item
        id="1860"
        titile="TestTitleupd90"
        itemtype="Appointment"
        text="Have you scheduled a upd 90 test?"
      />
    </itemlist>
  </Results>
</PPMDResults>;
```

Sample JSON:

```
{
  "PPMDResults": {
    "@s": "DEV07-WF01",
    "@lst": "6/8/2016 2:49:28 AM",
    "Results": {
      "@servertime": "2016-06-08T02:49:28.237",
      "@itemscount": "18",
      "itemlist": {
```

```
"item": [  
  {  
    "@id": "1860",  
    "@titile": "Eye Exam",  
    "@itemtype": "Order"  
  },  
  {  
    "@id": "1860",  
    "@titile": "TestTitleupd90",  
    "@itemtype": "Appointment",  
    "@text": "Have you scheduled a upd 90 test?"  
  }  
]  
}  
}  
}  
}
```

Update Health Watcher Plans

Action: updateehrhwplans

Sample XML:

```
<ppmdmsg
  action="updateehrhwplan"
  class="api"
  msgtime="6/7/2016 6:28:09 PM"
  templateid="1"
>
  <hmpplanlist>
    <hmpplan
      id="1"
      Title="TestTitleupd90"
      Text="Have you scheduled a upd 90 test?"
      Item_Type="Item Type"
      Start_Var="Start Vars"
      Start_Num="Start Num"
      Frequency_Var="Frequency Var"
      Frequency_Num=" Frequency Num"
      Numtimes="Numtimes"
    />
  </hmpplanlist>
</ppmdmsg>;
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "updateehrhwplan",
    "@class": "api",
    "@msgtime": "6/7/2016 6:28:09 PM",
```

```

    "@templateid": "1",
    "hmpplanlist": {
      "hmpplan": {
        "@id": "1",
        "@Title": "TestTitleupd90",
        "@Text": "Have you scheduled a upd 90 test?",
        "@Item_Type ":"Item Type",
        "@Start_Var":"Start Var",
        "@Start_Num":"Start Num",
        "@Frequency_Var":"Frequency Var",
        "@Frequency_Num":"Frequency Num",
        "@Numtimes":"Numtimes"
      }
    }
  }
}

```

Attributes:

templateid:The ID of the template that will be used to update hwplan.

Hmpplanlist: Node which contain all of the fields that will be updated in hwplan. It must contain id of the element you want to update. There can be multiple instances of hmpplan inside.

Results:

This action returns a success="1" if hwplans was updated without any errors.

Sample XML:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="DEV07-WF01" lst="6/8/2016 3:04:00 AM">
  <Results success="1" createdate="2016-06-08T03:04:00.630" />

```

```
</PPMDResults>;
```

Sample JSON:

```
{
  "PPMDResults": {
    "@s": "DEV07-WF01",
    "@lst": "6/8/2016 3:04:00 AM",
    "Results": {
      "@success": "1",
      "@createdate": "2016-06-08T03:04:00.630"
    }
  }
}
```

Get Health Watcher Plans Template

Action: getehrhwpplantemplate

Sample XML:

```
<ppmdmsg
  action="getehrhwpplantemplate"
  class="api"
  msgtime="6/7/2016 6:28:09 PM"
></ppmdmsg>;
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getehrhwpplantemplate",
    "@class": "api",
    "@msgtime": "6/7/2016 6:28:09 PM"
  }
}
```

Results:

This request returns a < item > element or object that contains a list of all fields that can be used in hwplan actions

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="DEV07-WF01" lst="6/8/2016 3:15:58 AM">
  <Results>
    <item
      id="[auto]"
```

```
hmid="HmItemID"
hmpatient_uid="HmPatient_UID"
patientid="PatientID"
hmtemplatefid="HmTemplateFID"
title="Title"
item_type="Item_Type"
text="Text"
appttypefid="ApptTypeFID"
protocol_id="Protocol_Id"
labcompanylookupfid="LabCompanyLookupFID"
labsetuplookupfid="LabSetupLookupFID"
drug_id="Drug_Id"
drug_frequency="Drug_Frequency"
drug_presc_type="Drug_Presc_Type"
drug_quantity="Drug_Quantity"
drug_refills="Drug_Refills"
autocreateflag="Autocreateflag"
autoinprogressflag="Autoinprogressflag"
autocompleteflag="Autocompleteflag"
start_num="Start_Num"
start_var="Start_Var"
frequency_num="Frequency_Num"
frequency_var="Frequency_Var"
numtimes="Numtimes"
createdby="CreatedBy"
createdat="CreatedAt"
changedby="ChangedBy"
changedat="ChangedAt"
drug_days="Drug_Days"
drug_quantityqualifier="Drug_QuantityQualifier"
drug_prescriptiontext="Drug_PrescriptionText"
drug_directions="Drug_Directions"
/>
</Results>
```

```
<Error />
</PPMDResults>;
```

Sample JSON:

```
{
  "PPMDResults": {
    "@s": "DEV07-WF01",
    "@lst": "6/8/2016 3:15:58 AM",
    "Results": {
      "item": {
        "@id": "[auto]",
        "@hmitemid": "HmItemID",
        "@hmpatient_uid": "HmPatient_UID",
        "@patientid": "PatientID",
        "@hmtemplatefid": "HmTemplateFID",
        "@title": "Title",
        "@item_type": "Item_Type",
        "@text": "Text",
        "@appttypefid": "ApptTypeFID",
        "@protocol_id": "Protocol_Id",
        "@labcompanylookupfid": "LabCompanyLookupFID",
        "@labsetuplookupfid": "LabSetupLookupFID",
        "@drug_id": "Drug_Id",
        "@drug_frequency": "Drug_Frequency",
        "@drug_presc_type": "Drug_Presc_Type",
        "@drug_quantity": "Drug_Quantity",
        "@drug_refills": "Drug_Refills",
        "@autocreateflag": "Autocreateflag",
        "@autoinprogressflag": "Autoinprogressflag",
        "@autocompleteflag": "Autocompleteflag",
        "@start_num": "Start_Num",
```



```
"@start_var": "Start_Var",
"@frequency_num": "Frequency_Num",
"@frequency_var": "Frequency_Var",
"@numtimes": "Numtimes",
"@createdby": "CreatedBy",
"@createdat": "CreatedAt",
"@changedby": "ChangedBy",
"@changedat": "ChangedAt",
"@drug_days": "Drug_Days",
"@drug_quantityqualifier": "Drug_QuantityQualifier",
"@drug_prescriptiontext": "Drug_PrescriptionText",
"@drug_directions": "Drug_Directions"
}
}
}
}
```

Upload Files to the Patient Chart Files

Action:uploadfile

Sample XML:

```
<ppmdmsg
  action="uploadfile"
  class="files"
  msgtime="11/12/2019 1:53:11 PM"
>
  <file
    name="Peter"
    description="Peter"
    filetype="I"
    fileext="png"
    visitid=""
    profileid=""
    facilityid=""
    providerid=""
    dos=""
    comments=""
    patientid="pat61722"
    local_file="220px-Peter_Griffin.png"
    referringproviderid=""
    savechanges="true"
    zipmode="0"
  >
    <grouplist>
      <group id="4" code="MISC" name="Miscellaneous">
        <categorylist>
          <category
            id="25"
            filegroupfid="4"
```

```

        code="MIUNSP"
        name="Unspecified"
        filetype="0"
        level="0"
        default="1"
    />
</categorylist>
</group>
</grouplist>
<filecontents>BASE64 </filecontents>
</file>
</ppmdmsg>;

```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "uploadfile",
    "@msgtime": "11/12/2019 1:53:11 PM",
    "file": {
      "@name": "Peter",
      "@description": "Peter",
      "@filetype": "I",
      "@fileext": "png",
      "@visitid": "",
      "@profileid": "",
      "@facilityid": "",
      "@providerid": "",
      "@dos": "",
      "@comments": "",
      "@patientid": "pat61722",
      "@local_file": "220px-Peter_Griffin.png",
      "@referringproviderid": ""
    }
  }
}

```

```

"@savechanges": "true",
"@zipmode": "0",
"grouplist": {
  "group": {
    "@id": "4",
    "@code": "MISC",
    "@name": "Miscellaneous",
    "categorylist": {
      "category": {
        "@id": "25",
        "@filegroupfid": "4",
        "@code": "MIUNSP",
        "@name": "Unspecified",
        "@filetype": "0",
        "@level": "0",
        "@default": "1"
      }
    }
  }
},
"filecontents": "BASE64"
}
}

```

Attributes:

- **Required:** Name and description (their values cannot be empty)

Result:

Sample XML:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFEJ24Y9">
  <Results>
    <filelist>
      <file
        id="18861877"
        name="PETER"
        description="PETER"
        filename="991207-18861877-0000"
        filelocation="2021\05\17\"
        filetype="I"
        fileext="PNG"
        filesize=""
        patientid="61722"
        patientname="TEST,PATIENT"
        patientchartnumber="123456"
        profileid=""
        profilecode=""
        profilename=""
        visitid=""
        facilityid=""
        referringproviderid=""
        referringprovidername=""
        referringprovidercode=""
        dos=""
        createdby="JOE_SWANSON"
        createdat="2021-05-16T13:42:38.207"
        printedby=""
        printedat=""
        reviewedby=""
        reviewedat=""
        approvedby=""
        approvedat=""
        lockedby=""

```

```

        lockedat=""
        changedby="JOE_SWANSON"
        changedat="2021-05-16T13:42:38.253"
        revision="0"
        zipmode="0"
        serverfile="1"
        charttype="Chart"
    >
    <categorylist>
        <category
            id="25"
            code="MIUNSP"
            name="Unspecified"
            groupcode="MISC"
            groupname="Miscellaneous"
            filetype="0"
        />
    </categorylist>
    <revisionlist />
</file>
</filelist>
<updatedlist />
</Results>
</PPMDResults>;

```

Sample JSON:

```

{
    "?xml": {
        "@version": "1.0",
        "@encoding": "ISO-8859-1"
    },

```

```

"PPMDResults": {
  "@s": "PRDAPI1WFE8QMCH",
  "Results": {
    "filelist": {
      "file": {
        "@id": "18861878",
        "@name": "PETER",
        "@description": "PETER",
        "@filename": "991207-18861878-0000",
        "@filelocation": "2021\\05\\17\\",
        "@filetype": "I",
        "@fileext": "PNG",
        "@filesize": "",
        "@patientid": "61722",
        "@patientname": "TEST,PATIENT",
        "@patientchartnumber": "123456",
        "@profileid": "",
        "@profilecode": "",
        "@profilename": "",
        "@visitid": "",
        "@facilityid": "",
        "@referringproviderid": "",
        "@referringprovidername": "",
        "@referringprovidercode": "",
        "@dos": "",
        "@createdby": "JOE_SWANSON",
        "@createdat": "2021-05-16T13:43:57.160",
        "@printedby": "",
        "@printedat": "",
        "@reviewedby": "",
        "@reviewedat": "",
        "@approvedby": "",
        "@approvedat": "",
        "@lockedby": "",

```

```

        "@lockedat": "",
        "@changedby": "JOE_SWANSON",
        "@changedat": "2021-05-16T13:43:57.190",
        "@revision": "0",
        "@zipmode": "0",
        "@serverfile": "1",
        "@charttype": "Chart",
        "categorylist": {
            "category": {
                "@id": "25",
                "@code": "MIUNSP",
                "@name": "Unspecified",
                "@groupcode": "MISC",
                "@groupname": "Miscellaneous",
                "@filetype": "0"
            }
        },
        "revisionlist": null
    },
    "updatedlist": null
}

```

Upload Files EHR

Example JSON:

```
[
  {
    "patientId": "111",
    "name": "Test ODBC Marketing PDF",
    "description": "Test API Post of PDF",
    "fileextension": "pdf",
    "isPatientEntered": "true",
    "fileBlob":
    "ExampleonlyxLjQKJcfsj6IKNSAwIG9iago8PC9MZW5ndGggNiAwIFivRmlsdGVyIC9GbGF0ZURlY29kZT4+CnN0cmVhbQp4nNVdW481RXIWNAYzzQh2mwZ2YBgOMwycZrcPeb/"
  }
]
```

Notes:

- To auto-accept the document, ensure that "isPatientEntered" is true and add "autoAccept": "true".
- To change the default document folder, in EHR, go to **Admin | System Setup | Default Folders**.
- The **name** attribute has a character limit of 50.

Save Patient's Preferred Pharmacy

Action: savepatientpharmacy

Sample XML Request:

```
<ppmdmsg class="pharmacy" action="savepatientpharmacy"
msgtime="8/24/2022 16:48:57" patientid="62081">
  <usercontext>150000e+QdlnJv/u0EN4i0H1nGIj/xbhzbz4F0Mb+KH
2F/L0Cj906fPR+rilt...blahblahblah</usercontext>
  <pharmacylist>
    <pharmacy id="0721147" name="WALGREENS DRUG STORE
#09821" address="36 PINE ST" city="NEW CANAAN" state="CT"
zip="068405430" phone="2038010121" fax="2038010154"
canreceivepcs="1" canreceivecancel="1"
schemaversion="Version2017" display="1" default="1"
ismailorder="0">
      <specialtylist>
        <specialty name="Retail"/>
        <specialty name="SupportsDigitalSignature"/>
      </specialtylist>
    </pharmacy>
  </pharmacylist>
</ppmdmsg>
```

Sample XML:

```
<ppmdmsg class="pharmacy" action="savepatientpharmacy"
nocookie="1" msgtime="8/24/2022 16:48:57" patientid="62081">
  <usercontext>9920658e+QdlnJv/u0EN4i0H1nGIj/xbhzbz4F0RwzfY+
EMb+KH2F/L0Cj906fPRtufA/FAm12YnXbMq9w8+rilt40jNLjdcB3kLqX/9Xh1
iJqK5fW0XNCt0e21EN1bePnzlwFCmWlxt+0EAZu1HEgHLtUwnzpxHagS9EuH6
DuJJrkAC88UaFudCDnFPJf16ful2j</usercontext>
  <pharmacylist>
    <pharmacy id="0721147" name="WALGREENS DRUG STORE
#09821" address="36 PINE ST" city="NEW CANAAN" state="CT"
zip="068405430" phone="2038010121" fax="2038010154"
canreceivepcs="1" canreceivecancel="1"
schemaversion="Version2017" display="1" default="1"
ismailorder="0">
  </pharmacy>
</pharmacylist>
</ppmdmsg>
```

```

        <specialtylist>
            <specialty name="Retail"/>
            <specialty name="SupportsDigitalSignature"/>
        </specialtylist>
    </pharmacy>
</pharmacylist>
</ppmdmsg>

```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "savepatientpharmacy",
    "@class": "pharmacy",
    "@msgtime": "4/1/2021 2:16:55 PM",
    "@nocookie": "0",
    "@patientid": "6018389",
    "pharmacylist": {
      "pharmacy": {
        "@id": "4610209",
        "@name": "30th Avenue Pharmacy",
        "@address": "3506 30th St",
        "@city": "Astoria",
        "@state": "NY",
        "@zip": "11103",
        "@phone": "(718) 555-8544",
        "@fax": "(718) 555-8546",
        "@canreceivepcs": "1",
        "@canreceivecancel": "1",
        "@schemaversion": "Version2017",
        "@display": "1",
        "@default": "1",
        "@ismailorder": "0"
      }
    }
  }
}

```

}
}
}
}



Get Patient Pharmacy

GetPatientPharmacy

This call returns the pharmacies listed in the patient's EHR record.

Method: GET

Endpoint: {{Redirect_URL_REST_PM}}/lookup/pharmacy/patient?patientid=111

Example Response:

```
<ArrayOfFavoritePharmacy
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <FavoritePharmacy>
    <PharmacyNcpdpId>4602757</PharmacyNcpdpId>
    <PharmacyName>U of U Hospital Pharmacy</PharmacyName>
    <Address>50 North Medical Drive</Address>
    <City>SALT LAKE CITY</City>
    <State>UT</State>
    <Zip>84132</Zip>
    <Phone>8015812276</Phone>
    <Fax>8015852306</Fax>
    <IsMailOrder>false</IsMailOrder>
    <IsDefault>false</IsDefault>
    <IsDisplay>true</IsDisplay>
    <CanReceiveEpcs>true</CanReceiveEpcs>
    <CanReceiveRxCancel>false</CanReceiveRxCancel>
  </FavoritePharmacy>
</ArrayOfFavoritePharmacy>
```

C-CDA EHR Actions

C-CDA EHR Actions

C-CDA getehrccdadocument

Action: getehrccdadocument

Sample XML:

```
<ppmdmsg action="getehrccdadocument" class="api"
msgtime="8/31/2015 6:18:06 AM" patientid="15"
document="clinicalsummary"></ppmdmsg>
```

Results:

This action returns a C-CDA document for a specified patient.

Sample XML:

```
<PPMDResults s="DEV07-WF01" lst="8/31/2015 6:25:27 AM"
n="1">
  <Results>
    <ClinicalDocument
      xmlns="urn:h17-org:v3"
      xmlns:voc="urn:h17-org:v3/voc"
      xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">...CCD contents...
    </ClinicalDocument>
  </Results>
</PPMDResults>
```

Notes:

- *Because a C-CDA document is XML, JSON is not an ideal protocol for this API action.*
- *patientid: parameter is required*
- *document: this parameter is required and has to set to these values: transitionofcare, exportsummary, ambulatorysummary, clinicalsummary.*
- *Also there is hidden licensekey parameter and results is based on it*

C-CDA getehrccdadata

Action: getehrccdadata

Sample XML:

```
<ppmdmsg action="getehrccdadata" class="api"
msgtime="8/31/2015 6:18:06 AM" patientid="15"
document="clinicalsummary"></ppmdmsg>
```

Results:

This action returns intermediate C-CDA data for the specified patient in a somewhat simpler XML schema that is used by AdvancedMD as an intermediate format between the structured data in the EHR and the C-CDA schema.

Sample XML:

```
<PPMDResults s="DEV07-WF01" lst="8/31/2015 6:47:33 AM" n="1">
  <Results generated="20150831064733" reason="">
    <patient id="15" chart="13" address1="" address2="4918
DAVID LN" city="WINDSORLOCKS" state="AZ" zip="49442"
country="US" homephone="3025550143" workphone="5725550168"
workext="" otherphone="" otherphonetype="0" lastname="AULTMAN"
firstname="ELAINE" middlename="REBA" gender="F" dob="19540912"
racecode="" racedisplayname="" ethnicity=""
hipaarelationship="18" language="" providerid="7"
/>...additional content...
  </Results>
</PPMDResults>
```

Notes:

- *patientid: parameter is required*
- *document: this parameter is required and has to set to these values: transitionofcare, exportsummary, ambulatorysummary, clinicalsummary.*
- *also there is hidden licensekey parameter and results is based on it*

C-CDA saveehrccdadocument**Action:saveehrccdadocument****Sample XML:**

```
<ppmdmsg action="saveehrccdadocument"
class="api" senttime="2014-06-05T17:29:17.9Z" subject="test">
  <patient firstname="KAREN" middlename="" lastname="ABBOTT"
suffix="" dob="1901-11-13" gender="F" zip="46816" />
  <attachmentlist>
    <attachment name="ccda.xml" type="application/hl7-
v3+xml">
      <ClinicalDocument
        xmlns="urn:hl7-org:v3"
        xmlns:voc="urn:hl7-org:v3/voc"
        xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">...document content...
      </ClinicalDocument>
    </attachment>
  </attachmentlist>
  <usercontext>Test User Context</usercontext>
</ppmdmsg>
```

Results:

Returns only success or fault of saving this C-CDA document.

Sample XML:

```
<PPMDResults s="DEV07-WF01" lst="8/31/2015 7:06:51 AM" n="1">
  <Results success="1"></Results>
</PPMDResults>
```

Notes:

- *Parameters:*
 - *<pmmd/> element:*
 1. *subject: Required to be supplied by the caller.*
 2. *plaintext: Optional, can be used to provide a more lengthy description of the document.*
 - *<attachmentlist><attachment/> element:*
 1. *The "attachment" contains the C-CDA document itself. The C-CDA document's root element is <ClinicalDocument />.*
 2. *name: Required, must be a valid filename (*.xml).*

C-CDA saveehrccdadata

Action:saveehrccdadata

Sample XML:

```
<ppmdmsg action="saveehrccdadata" class="api" senttime="2014-06-05T17:29:17.9Z" subject="test"
document="clinicalsummary">...document content...</ppmdmsg>
```

Results:

Returns only success or fault of saving this C-CDA document.

Sample XML:

```
<PPMResults>
  <Results success="1"></Results>
</PPMResults>
```

Notes:

- *This action transforms intermediate C-CDA data into C-CDA document using "getccdafromintermediate" action and then just save received document using "saveehrccdadocument" action.*
- *Parameters:*
 - *<pmmid/> element:*
 1. *subject: Required to be supplied by the caller.*
 2. *plaintext: Optional, can be used to provide a more lengthy description of the document.*
 - *<attachmentlist><attachment/> element:*
 1. *The "attachment" contains the C-CDA document itself. The C-CDA document's root element is <ClinicalDocument />.*
 2. *name: Required, must be a valid filename (*.xml).*

C-CDA getehrccdadata

Action: getehrccdadata

Sample XML:

```
<ppmdmsg action="getehrccdadata" class="api"
msgtime="8/31/2015 6:18:06 AM"
patientid="15" document="clinicalsummary"></ppmdmsg>
```

Results:

This request returns intermediate C-CDA data for the specified patient in a somewhat simpler XML schema that is used by AdvancedMD as an intermediate format between the structured data in the EHR and the C-CDA schema.

Sample XML:

```
<PPMDResults s="DEV07-WF01" lst="8/31/2015 6:47:33 AM" n="1">
<Results generated="20150831064733" reason=""><patient id="15"
chart="13" address1="" address2="4918 DAVID LN"
city="WINDSORLOCKS"
state="AZ" zip="49442" country="US" homephone="3025550143"
workphone="5725550168" workext="" otherphone=""
otherphonetype="0"
lastname="AULTMAN" firstname="ELAINA" middlename="REBA"
gender="F"
dob="19540912" racecode="" racedisplayname="" ethnicity=""
hipaarelationship="18" language="" providerid="7"
/>...additional content...
</Results></PPMDResults>
```

Notes:

- *patientid: parameter is required*
- *document: this parameter is required and has to set to these values: transitionofcare, exportsummary, ambulatorysummary, clinicalsummary.*
- *also there is hidden licensekey parameter and results is based on it*

C-CDA getehrccdadocument

Action: getehrccdadocument

Sample XML:

```
<ppmdmsg action="getehrccdadocument" class="api"
msgtime="8/31/2015
6:18:06 AM" patientid="15"
document="clinicalsummary"></ppmdmsg>
```

Results:

This request returns a C-CDA document for a specified patient.

Sample XML:

```
<PPMDResults s="DEV07-WF01" lst="8/31/2015 6:25:27 AM" n="1">
<Results><ClinicalDocument xmlns="urn:h17-org:v3"
xmlns:voc="urn:h17-org:v3/voc"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">...CCD
contents...</ClinicalDocument>
</Results></PPMDResults>
```

Notes:

- *Because a C-CDA document is XML, JSON is not an ideal protocol for this API action.*
- *patientid: parameter is required*
- *document: this parameter is required and has to set to these values: transitionofcare, exportsummary, ambulatorysummary, clinicalsummary.*
- *Also there is hidden licensekey parameter and results is based on it*

C-CDA saveehrccdadata

Action:saveehrccdadata

Sample XML:

```
<ppmdmsg action="saveehrccdadata" class="api" senttime="2014-06-05T17:29:17.9Z"
subject="test" document="clinicalsummary">...document
content...</ppmdmsg>
```

Results:

Returns only success or fault of saving this C-CDA document.

Sample XML:

```
<PPMDResults>
<Results success="1">
</Results>
</PPMDResults>
```

Notes:

- *This action transforms intermediate C-CDA data into C-CDA document using "getccdafromintermediate" action and then just save received document using "saveehrccdadata" action.*
- *Parameters:*
 - *<ppmd/> element:*
 1. *subject: Required to be supplied by the caller.*
 2. *plaintext: Optional, can be used to provide a more lengthy description of the document.*

- *<attachmentlist><attachment/> element:*
 1. *The "attachment" contains the C-CDA document itself. The C-CDA document's root element is <ClinicalDocument />.*
 2. *name: Required, must be a valid filename (*.xml).*

C-CDA saveehrccdadocument

Action:saveehrccdadocument

Sample XML:

```
<ppmdmsg action="saveehrccdadocument"
class="api" senttime="2014-06-05T17:29:17.9Z" subject="test">
  <patient firstname="KAREN" middlename="" lastname="ABBOTT"
suffix="" dob="1901-11-13" gender="F" zip="46816" />
  <attachmentlist>
    <attachment name="ccda.xml" type="application/hl7-v3+xml">
      <ClinicalDocument xmlns="urn:hl7-org:v3"
xmlns:voc="urn:hl7-org:v3/voc"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-
instance">...document content...</ClinicalDocument>
    </attachment>
  </attachmentlist>
  <usercontext>Test User Context</usercontext>
</ppmdmsg>
```

Results:

Returns only success or fault of saving this C-CDA document.

Sample XML:

```
<PPMDResults s="DEV07-WF01" lst="8/31/2015 7:06:51 AM" n="1">
  <Results success="1"></Results>
</PPMDResults>
```

Notes:

- *Parameters:*
 - *<pmmmd/> element:*
 1. *subject: Required to be supplied by the caller.*
 2. *plaintext: Optional, can be used to provide a more lengthy description of the document.*
 - *<attachmentlist><attachment/> element:*
 1. *The "attachment" contains the C-CDA document itself. The C-CDA document's root element is <ClinicalDocument />.*
 2. *name: Required, must be a valid filename (*.xml).*

Transaction Actions

Add a Payment

Action:addpayments

JSON Example:

```
{
  "ppmdmsg": {
    "@action": "addpayments",
    "@class": "paymententry",
    "@msgtime": "7/25/2023 10:57:34 AM",
    "@ltq": "2023-07-25 10:55:21 ",
    "@useopenedge": "1",
    "@checkout": "0",
    "@date": "",
    "patient": {
      "unappliedpaymentlist": "",
      "unappliedwriteofflist": "",
      "chargelist": {
        "charge": {
          "paymentlist": {
            "payment": {
              "@amount": "50.00",
              "@id": "",
              "@status": "B"
            }
          },
          },
      },
      "writeofflist": {
        "writeoff": {
          "@id": "",
          "@risk": "0",
          "@amount": "0.00",
          "@code": "WOINS",
          "@status": "B"
        }
      }
    }
  }
}
```

```

    },
    "@id": "5076070",
    "@allowed": "500.00",
    "@insportion": "1000.00",
    "@patportion": "0.00",
    "@insbalance": "1000.00",
    "@patbalance": "0.00",
    "@changedat": "2023-07-21T14:40:02.400",
    "@profile": "3"
  }
},
"@patientid": "5984397",
"@paysource": "2",
"@postingmethod": "payentry",
"@amount": "50.00",
"@paycode": "PI",
"@woamount": "916.9",
"@paymethod": "2",
"@carrierid": "11394",
"@depositdate": "07/25/2023",
"@case@note": "note goes here",
"@checknumber": "546464617",
"@inclstmt": "0",
"@postedby": "SMITHJOHN",
"@batch": "460519"
}
}
}

```

Add Write Offs

Action: addwriteoffs

Sample JSON:

```
{
  "ppmdmsg": {
    "unappliedwriteofflist": "",
    "chargelist": {
      "charge": {
        "writeofflist": {
          "writeoff": {
            "@amount": "50.00",
            "@profile": "3"
          }
        },
        "@id": "5124322"
      }
    },
    "@action": "addwriteoffs",
    "@class": "writeoffentry",
    "@msgtime": "1/19/2024 11:17:35 AM",
    "@ltq": "2024-01-19 11:16:16 ",
    "@patientid": "pat6018389",
    "@wocode": "wocode10",
    "@amount": "50.00",
    "@batch": "477205",
    "@source": "2",
    "@inclstmt": "0",
    "@case@note": "",
    "@writeoffdate": "01/19/2024"
  }
}
```

Source ID	Source
1	Patient
2	Insurance

Charge Detail

Action:getchargedetaildataicd10

Sample XML:

```
<ppmdmsg action="getchargedetaildataicd10"  
class="demographics"  
msgtime="12/16/2005 2:52:56 PM" chargeid="472676"/>
```

Sample JSON:

```
{  
  
  "ppmdmsg": {  
  
    "@action": "getchargedetaildataicd10",  
  
    "@class": "demographics",  
  
    "@msgtime": "12/16/2005 2:52:56 PM",  
  
    "@chargeid": "472676"  
  
  }  
  
}
```

Attributes:

chargeid: Please specify the charge ID that you need more information on.

Results:

This request returns detailed data related to a charge. It has the visit that this charge is hooked to, the charge detail, etc. Results do not show other charges

hooked to the visit. Results will only show the charge specified by the chargeid attribute.

Sample XML:

```
<?xml version="1.0" ?>
< PPMDResults>
  <Results>
    <patientlist>
      <patient id="119011" name="BROWN,JIM" chart="943">
        <visitlist>
          <visit id="vst251486" seq="0000251486"
date="09/17/2005" isappt="0"
profile="prof15" refplan="rplan123459" episode="eps119090"
insorder="" note="" onhcfa="0" acceptassign="1"
forcepaper="0" approvedby="JAMES" approvedat="09/29/2005"
facility="">
            <extins />
            <chargelist>
              <charge id="charge472676" createtime="2005-09-
17T20:48:19" resparty="resp113349" begindate="09/17/2005"
enddate="09/17/2005"
                begintime="00:00" endtime="00:00"
proccode="pcode34974" fee="101.00" units="1" netfee="0"
lineitemnote="" duration="0"
                aging="09/17/2005" pos="11" tos="01"
                allowed="101.00" patportion="0.00"
insportion="101.00" patbalance="0.00" insbalance="101.00"
                billins="1" insbilled="0" batchnumber="251"
void="0" protected="0" lastbilledcarrier=""
                datebilled="" voideddate=""
totalvisitcharges="236.00" finclasscode="BD"
entered="09/17/2005"
                dayclosed="1" paymentplan="0" postedby="PPMD_
AJOHN" diagcodes="dcode88228" modcodes=""
                cobcode="" note="">
              <paymentlist />
              <insbilllist />
              <statementlist />
            </charge>
          </visitlist>
        </patient>
      </patientlist>
    </Results>
  </PPMDResults>
```

```

        </chargelist>
    </visit>
</visitlist>
<episodelist>
    <episode id="eps119090" name="STANDARD" />
</episodelist>
<insplanlist>
    <insplan id="ins54154" carrier="car11325"
begindate="12/06/2005" enddate="" sequence="1"
        coverage="1" subscriber="resp113349" />
</insplanlist>
<refplanlist>
    <refplan id="rplan123459" refprov="rprov7163"
type="I" reason="SELF-REFERRAL" preauth=""
        begindate="07/18/2005" enddate="" maxvisits="0"
usedvisits="0" maxamount=""
        usedamount="0.00" sequence="1" facility="" proccode=""
diagcodes="" />
</refplanlist>
</patient>
</patientlist>
<facilitylist />
<proccodelist>
    <proccode id="pcode34974" name="OFC/OUTPT E&M ESTAB
MOD-HI 25 MIN" code="99214" />
</proccodelist>
<diagcodelist>
    <diagcode id="dcode88228" name="AGORAPHOBIA WITH PANIC
DISORDER" code="300.21" />
</diagcodelist>
<modcodelist />
<notelist />
<resppartylist>
    <respparty id="resp113349" name="BROWN,JIM" />
</resppartylist>
<cobcodelist />

```

```

        <carrierlist>
            <carrier id="car11325" name="AAA INSURANCE CO"
code="AAA01" dme="0" />
        </carrierlist>
        <refproviderlist>
            <refprovider id="rprov7163" name="YOUNG,ROB E"
code="YOUNG " specialty="" practicename="" />
        </refproviderlist>
        <profilelist>
            <profile id="prof15" name="YOUNG,ROB E" code="YOUNG"
chargefeesched="feesch21092" fullinactive="No" status="ACTIVE"
/>
        </profilelist>
        <feeschedlist>
            <feesched id="feesch21092" name="STANDARD" type="F" />
        </feeschedlist>
        <finclasslist>
            <finclass id="fclass196" code="BD" name="BAD DEBT PT"
/>
        </finclasslist>
    </Results>
    <Error />
< /PPMDResults>

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0"
  },
  "PPMDResults": {
    "Results": {
      "patientlist": {
        "patient": {
          "@id": "119011",

```

```

"@name": "BROWN,JIM",
"@chart": "943",
"visitlist": {
  "visit": {
    "@id": "vst251486",
    "@seq": "0000251486",
    "@date": "09/17/2005",
    "@isappt": "0",
    "@profile": "prof15",
    "@refplan": "rplan123459",
    "@episode": "eps119090",
    "@insorder": "",
    "@note": "",
    "@onhcfa": "0",
    "@acceptassign": "1",
    "@forcepaper": "0",
    "@approvedby": "JAMES",
    "@approvedat": "09/29/2005",
    "@facility": "",
    "extins": null,
    "chargelist": {
      "charge": {
        "@id": "charge472676",
        "@createtime": "2005-09-17T20:48:19",
        "@respparty": "resp113349",
        "@begindate": "09/17/2005",
        "@enddate": "09/17/2005",
        "@begintime": "00:00",
        "@endtime": "00:00",
        "@proccode": "pcode34974",
        "@fee": "101.00",
        "@units": "1",
        "@netfee": "0",
        "@lineitemnote": "",

```

```

        "@duration": "0",
        "@aging": "09/17/2005",
        "@pos": "11",
        "@tos": "01",
        "@allowed": "101.00",
        "@patportion": "0.00",
        "@insportion": "101.00",
        "@patbalance": "0.00",
        "@insbalance": "101.00",
        "@billins": "1",
        "@insbilled": "0",
        "@batchnumber": "251",
        "@void": "0",
        "@protected": "0",
        "@lastbilledcarrier": "",
        "@datebilled": "",
        "@voideddate": "",
        "@totalvisitcharges": "236.00",
        "@finclasscode": "BD",
        "@entered": "09/17/2005",
        "@dayclosed": "1",
        "@paymentplan": "0",
        "@postedby": "PPMD_AJOHN",
        "@diagcodes": "dcode88228",
        "@modcodes": "",
        "@cobcode": "",
        "@note": "",
        "paymentlist": null,
        "insbillllist": null,
        "statementlist": null
    }
}
},

```

```

"episodelist": {
  "episode": {
    "@id": "eps119090",
    "@name": "STANDARD"
  }
},
"insplanlist": {
  "insplan": {
    "@id": "ins54154",
    "@carrier": "car11325",
    "@begindate": "12/06/2005",
    "@enddate": "",
    "@sequence": "1",
    "@coverage": "1",
    "@subscriber": "resp113349"
  }
},
"refplanlist": {
  "refplan": {
    "@id": "rplan123459",
    "@refprov": "rprov7163",
    "@type": "I",
    "@reason": "SELF-REFERRAL",
    "@preauth": "",
    "@begindate": "07/18/2005",
    "@enddate": "",
    "@maxvisits": "0",
    "@usedvisits": "0",
    "@maxamount": "",
    "@usedamount": "0.00",
    "@sequence": "1",
    "@facility": "",
    "@proccode": "",
    "@diagcodes": ""
  }
}

```

```

        }
    }
}
},
"facilitylist": null,
"proccodelist": {
    "proccode": {
        "@id": "pcode34974",
        "@name": "OFC/OUTPT E&M ESTAB MOD-HI 25 MIN",
        "@code": "99214"
    }
},
"diagodelist": {
    "diagcode": {
        "@id": "dcode88228",
        "@name": "AGORAPHOBIA WITH PANIC DISORDER",
        "@code": "300.21"
    }
},
"mododelist": null,
"notelist": null,
"resppartylist": {
    "respparty": {
        "@id": "resp113349",
        "@name": "BROWN,JIM"
    }
},
"cobodelist": null,
"carrierlist": {
    "carrier": {
        "@id": "car11325",
        "@name": "AAA INSURANCE CO",
        "@code": "AAA01",
        "@dme": "0"
    }
}

```

```

    }
  },
  "refproviderlist": {
    "refprovider": {
      "@id": "rprov7163",
      "@name": "YOUNG,ROB E",
      "@code": "YOUNG ",
      "@specialty": "",
      "@practicename": ""
    }
  },
  "profilelist": {
    "profile": {
      "@id": "prof15",
      "@name": "YOUNG,ROB E",
      "@code": "YOUNG",
      "@chargefeesched": "feesch21092",
      "@fullinactive": "No",
      "@status": "ACTIVE"
    }
  },
  "feeschedlist": {
    "feesched": {
      "@id": "feesch21092",
      "@name": "STANDARD",
      "@type": "F"
    }
  },
  "finclasslist": {
    "finclass": {
      "@id": "fclass196",
      "@code": "BD",
      "@name": "BAD DEBT PT"
    }
  }

```



```
    }  
  },  
  "Error": null  
}  
}
```

Get Account Detail

JSON Example:

```
{
  "ppmdmsg": {
    "@nocookie": 1,
    "usercontext":
      "991024GZZ/PmVj5ITUUOuVrOPgKaAa15opfv2t1I05cryQwzVpsCKbb6rAk7
      nb6eVF8ePIGy5/2/ErXlkE60ehMe65w9EVz67Qeps9/ieDM19cJ8g+fUrP9mBM
      DCAo6vteUih8Hg0go8264SR7zWRNLM7wo2+5Njgu7iJkprtNnFa43DBVw5Gt5P
      WKiR+3VVNFd3fjw9dyngyZPwTa3M720liRggq5LZ38TFqbxvAIx12OwhKNpnu9
      f9qqaTlzVpbm0pi",
    "@class": "collections",
    "@action": "getaccountdetail",
    "@resppartyid": "3",
    "@collections": 1,
    "@msgtime": "2023-12-04 15:54:31"
  }
}
```

Get Accounts for the Collector

JSON Example:

```
{
  "ppmdmsg": {
    "@nocookie": 1,
    "usercontext":
      "991024GZZ/PmVj5ITUUOuVrOPgKaAa15opfv2tlI05cryQwzVpsCKbb6rAk7
      nb6eVF8ePIGy5/2/ErXlkE60ehMe65w9EVz67Qeps9/ieDM19cJ8g+fUrP9mBM
      DCAo6vteUih8Hg0go8264SR7zWRNLM7wo2+5Njgu7iJkprtNnFa43DBVw5Gt5P
      WKiR+3VVNFd3fjw9dyngyZPwTa3M720liRggq5LZ38TFqbxvAIx12OwhKNpnu9
      f9qqaTlzVpbm0pi",
    "@class": "collections",
    "@action": "getaccounts",
    "@delinquent": "0",
    "@collectorid": "7540",
    "@msgtime": "2023-12-04 15:53:20"
  }
}
```

Get Worklist

JSON Example:

```
"ppmdmsg": {  
  "@nocookie": 1,  
  "usercontext":  
    "991024GZZ/PmVj5ITUUOuVrOPgKaAaA15opfv2t1I05cryQwzVpsCKbb6rAk7  
nb6eVF8ePIGy5/2/ErXlkE60ehMe65W9EVz67Qeps9/ieDM19cJ8g+fUrP9mBM  
DCAo6vteUih8Hg0go8264SR7zWRNLM7wo2+5Njgu7iJkprtNnFa43DBVw5Gt5P  
WKiR+3VVNFd3fjw9dyngyZPwTa3M720liRggq5LZ38TFqbxvAIx120whKNpnu9  
f9qqaTlzVpbm0pi",  
  "@class": "collections",  
  "@action": "getworklist",  
  "@msgtime": "2023-12-04 15:48:52"  
}
```

```
}
```

Get Worklist Totals

JSON Example:

```
{
  "ppmdmsg": {
    "@nocookie": 1,
    "usercontext":
      "991024GZZ/PmVj5ITUUOuVrOPgKaAa15opfv2t1I05cryQwzVpsCKbb6rAk7
      nb6eVF8ePIGy5/2/ErXlkE60ehMe65w9EVz67Qeps9/ieDML9cJ8g+fUrP9mBM
      DCAo6vteUih8Hg0go8264SR7zWRNLM7wo2+5Njgu7iJkprtNnFa43DBVw5Gt5P
      WKiR+3VVNFd3fjw9dyngyZPwTa3M720liRggq5LZ38TFqbxxvAIx12OwhKNpnu9
      f9qqaTlzVpbm0pi",
    "@class": "collections",
    "@action": "getworklisttotals",
    "@msgtime": "2023-12-04 15:49:03"
  }
}
```

Insert Action History

JSON Example:

```
{
  "ppmdmsg": {
    "@nocookie": 1,
    "usercontext":
      "991024GZZ/PmVj5ITUUOuVrOPgKaAaA15opfv2t1I05cryQwzVpsCKbb6rAk7
      nb6eVF8ePIGy5/2/ErXlkE60ehMe65W9EVz67Qeps9/ieDML9cJ8g+fUrP9mBM
      DCAo6vteUih8Hg0go8264SR7zWRNLM7wo2+5Njgu7iJkprtNnFa43DBVw5Gt5P
      WKiR+3VVNFd3fjw9dyngyZPwTa3M720liRggq5LZ38TFqbxvAIx12OwhKNpnu9
      f9qqaTlzVpbm0pi",
    "@class": "collections",
    "@actionid": "actioncode54",
    "@nextactionid": "nextaction54",
    "@followupdate": "12/11/2023",
    "@note": "this is a test",
    "@promisedpmt": "10.00",
    "@action": "insertactionhistory",
    "@resppartyid": "3",
    "@msgtime": "2023-12-04 15:57:54"
  }
}
```

Update Visit With New Charges

Action:updvisitwithnewcharges

Sample XML:

```
<ppmdmsg action="updvisitwithnewcharges" class="chargeentry"
msgtime="4/1/2004 3:43:17 PM" patientid="198555"
episodeid="60212" approval="1">
  <visit id="76609" date="01/31/2006" profile="4"
insorder="1" refplan="65976" facility="" force="1">
    <chargelist>
      <charge respparty="64449" begindate="01/31/2006"
enddate="01/31/2006" diagcodes="81500"
      modcodes="" finclasscode="FF" aging="01/31/2006"
billins="1" proccode="35773"
      cobcode="" pos="11" tos="01" units="4" netfee="0"
fee="900.00" allowed="900.00" patportion="20.00"
      insportion="880.00" patbalance="20.00"
insbalance="880.00">
        </charge>
      </chargelist>
    </visit>
  </ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "updvisitwithnewcharges",
    "@class": "chargeentry",
    "@msgtime": "4/1/2004 3:43:17 PM",
    "@patientid": "198555",
    "@episodeid": "60212",
    "@approval": "1",
    "visit": {
      "@id": "76609",
```

```

"@date": "01/31/2006",
"@profile": "4",
"@insorder": "1",
"@refplan": "65976",
"@facility": "",
"@force": "1",
"chargelist": {
  "charge": {
    "@respparty": "64449",
    "@begindate": "01/31/2006",
    "@enddate": "01/31/2006",
    "@diagcodes": "81500",
    "@modcodes": "",
    "@finclasscode": "FF",
    "@aging": "01/31/2006",
    "@billins": "1",
    "@proccode": "35773",
    "@cobcode": "",
    "@pos": "11",
    "@tos": "01",
    "@units": "4",
    "@netfee": "0",
    "@fee": "900.00",
    "@allowed": "900.00",
    "@patportion": "20.00",
    "@insportion": "880.00",
    "@patbalance": "20.00",
    "@insbalance": "880.00"
  }
}
}
}
}

```


Attributes:

episodeid: use the Standard episode ID for your visit. There are times when one uses episodes for auto accidents, work comp etc.

approval="1" : 1 means that this visit will need an approval before processing. If the charges you are entering need to be viewed by someone and approved, then set approve="1" and these charges will appear in the Claim Center. If approve="0" then these charges will not show up for approval in Claim Center.

insorder: Here one can specify the insurance order for this visit. This order specifies what will be the primary insurance, secondary insurance etc. You can get the patient's current insurance order from the demographics insurance tab.

refplan: You will have this values from the getdemographics calls.

facility: If you have a facility associated with this charge then the attribute will require a facility ID, otherwise it will be an empty string.

begindate: This is the "Begin Date Of Service".

enddate: This is the "End Date Of Service".

finclasscode: Set the financial class of the patient. This is the financial class code not the ID. Each patient is assigned a financial class.

billins="1": The insurance will be billed for this claim.

aging: The date from which aging starts (for A/R buckets). This usually is the same as begindate.

cobcode: If you have coordinate of benefits codes, then this field will be used and you will also need to set them up in the COB system settings (master file).

pos: Place of service. For some POSs, a facility code is required.

tos: Type of service

netfee="0": Most of the cases the netfee should be set to zero. If netfee="1" then the total fee = fee, and that means you are stating that units is not multiplied to the fee to get total fee.

fee: The charge fee.

allowed: The charge fee agreed between the provider and carrier. The allowable amount goes here.

patportion: Patient portion of the total fee.

insportion: Insurance portion of the total fee.

patbalance: Generally, the same as patient portion.

insbalance: Generally, the same as the insurance portion.

Notes:

- *force:*
 - *0: post the charge if there is no charge posted to this visit.*
 - *1: post the charge even if this visit has a charge posted to it. This will overwrite the existing charge information.*
- *Please retrieve the values of proccode, modcodes by using lookupproccode and lookupmodcode actions. You must use the procedure code ID, not the actual procedure code.*
- *Please use the actual diagnosis code. This will auto import the code into the key and eliminate the need for the look up call*
- *All charges in the chargelist must be for the same patient/visit.*

Save a Charge

Action:savecharges

Notes:

- Only XML can use the actual diagnosis code.
- If the **includenewchargeids** parameter value is set to **1**, the list of newly created charge IDs is included in the response.

Sample XML:

```
<ppmdmsg action='savecharges' class='api' msgtime='12/15/2023
2:07:11 PM' patientid='111' >
  <visit id='9570604' force='0' includenewchargeids='1'>
    <chargelist>
      <charge proccode="35603" units="1" ndccode=""
ndcquantity="" ndcmeasure="" ndcmeasurefid="" ndcprice=""
pos="11">
        <diagodelist codeset="10">
          <diagcode code="H35.31" />
          <diagcode code="H40.011" />
        </diagodelist>
      </charge>
      <charge proccode="35604" units="1" ndccode=""
ndcquantity="" ndcmeasure="" ndcmeasurefid="" ndcprice=""
pos="12">
        <diagodelist codeset="5">
          <diagcode code="A00" />
          <diagcode code="A02"/>
        </diagodelist>
      </charge>
    </chargelist>
  </visit>
</ppmdmsg>
```

Notes: All JSON calls should use DiagCodes and ProcCode IDs instead of actual diagnosis code.

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "savecharges",
    "@class": "api",
    "@msgtime": "4/1/2004 3:43:17 PM",
    "@patientid": "5500536",
    "visit": {
      "@id": "8549720",
      "@facility": "97",
      "@force": "0",
      "@includenewchargeids": "1",
      "chargelist": {
        "charge": [
          {
            "@proccode": "99604",
            "@units": "1",
            "@diagcodes": "80463",
            "@modcodes": ""
          },
          {
            "@proccode": "99605",
            "@units": "3",
            "@diagcodes": "80463 80464",
            "@modcodes": ""
          }
        ]
      }
    }
  }
}
```

```
}  
}
```

Note: Please retrieve the values of *proccode*, *modcodes* and *diagcodes* by using *lookupproccode*, *lookupmodcode* and *lookupdiagcode* actions. You must use the procedure code ID and diagnosis code ID, not the actual procedure code.

Results:

This action returns a "success='1'", indicating that the charge was posted, or an error message, contained in the <Error> element:

Sample XML Response if includenewchargeids is Not Equal to 1 (Default):

```
<PPMDResults s="5CD116MK1W" lst="3/25/2025 12:11:22 PM">  
  <Results success="1" chargeid="4276009" />  
  <Error />  
</PPMDResults>
```

Sample XML Response if includenewchargeids Equals 1:

```
<PPMDResults s="5CD116MK1W" lst="3/25/2025 12:11:22 PM">  
  <Results success="1" chargeid="4276009">  
    <chargelist>  
      <charge id="4276008" />  
      <charge id="4276009" />  
    </chargelist>  
  </Results>  
</PPMDResults>
```

```
</Results>
<Error />
</PPMDResults>
```

Note: The *chargeid* attribute on the *Results* node represents the ID of the last created charge. It is a part of legacy implementation and should not be used by new APIs. Please use *ids* from the *chargelist* instead.

Sample JSON Response:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "advancedmd-api-processrequest-0-85ddb45dbc-7hdd9",
    "@lst": "04/04/2025 07:36:17",
    "Results": {
      "@success": "1",
      "@chargeid": "4275570",
      "chargelist": {
        "charge": [
          {
            "@id": "4275569"
          },
          {
            "@id": "4275570"
          }
        ]
      }
    }
  }
}
```

```

        }
    ]
}
},
"Error": null
}
}

```

Notes:

- *If an error occurs, the element will contain information in a standard format that can be displayed to the user.*
- *force:*
 - *1: allow duplicate charges on the same date of service for the same provider and same patient.*
 - *0: prevent duplicate charges on the same date of service for the same provider and same patient.*
- *All charges in the chargelist must be for the same patient/visit.*
- *This method will void any charges that exist on the visit and will post the charges in the chargelist element of the call. You may want to verify that no charges exist already for the visit that you are attempting to savecharges for.*

If you are working with NDC Price, Quantity and Measure, make sure your CPT codes are set up properly to automatically populate Price, Quantity, and Measure.

- To overwrite Price, include in your api call @ndcprice: "15.00"
- To overwrite Quantity, include in your api call @ndcquantity: "5"
- To overwrite Measure, include in your api call @ndcmeasurefid: "140"

ALL Measure FIDs

- ID 139 IU
- ID 140 G
- ID 141 MG
- ID 142 ML
- ID 143 UN

Example of UI CPT Code Set Up

Procedure Charge Codes - Google Chrome

Procedure Code: INJ DEPO-ESTRADIOL CYPIONATE UP 5MG

Description: ☐ Include on Claim

Units: RVU: Category:

Place of Service:

Type of Service:

CMN Form:

Global Period Days: ☒ Use Medicare Value ☒ Global Period Warnings

Follow-up Instructions:

UB92 Revenue Code:

NDC

Code: Description:

Unit Price: Quantity: Unit of Measure:

CVX Code: ☐ Use CDC Mapping

Settings:

☐ Apply Sales Tax ☐ Assess \$ Copay ☐ Require CLIA

☒ Electronic ☒ Bill Insurance ☒ Bill Patient

☐ Referral Required ☐ Authorization Required

☐ Base Units on EHR Note Duration

Note:

Facility Where Purchased:

Substitute Carrier Codes

1: 2: 3: 4: 5: 6:

	MTD	YTD
Totals:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
Units:	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

Optional Parameter

For the **savecharges** action, the payload may include an optional **customclaimfieldsavailable** parameter. If its value is set to **1**, the charge's custom claim fields can be created/updated by specifying the **customclaimfieldlist** node inside each charge node with the following data:

id	Custom claim field identifier. Use selectcustomclaimfield action to get this value.
value	The user-specified value.

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "savecharges",
    "@class": "api",
    "@msgtime": "4/1/2004 3:43:17 PM",
    "@patientid": "5896252",
    "@customclaimfieldsavailable": "1",
    "visit": {
      "@id": "132456"
    },
    ...
    "chargelist": {
      "charge": [
        {
          ...
          "customclaimfieldlist": {
            "customclaimfield": [
              {
                "@id": "178",
                "@value": "Hello from the API"
              }
            ]
          }
        }
      ]
    }
  }
}
```

```

    }
  ]
}
}
}
}
}

```

Sample XML:

```

<ppmdmsg action='savecharges' class='api' msgtime='12/15/2023
2:07:11 PM' patientid='111' customclaimfieldsavailable='1' >
  <visit id='9570604' ...>
    <chargelist>
      <charge proccode="35603" ...>
        ...
        <customclaimfieldlist>
          <customclaimfield id="178" value="Hello
from the API" />
        </customclaimfieldlist>
      </charge>
    </chargelist>
  </visit>
</ppmdmsg>

```

Batching

Some practices use batching to keep track of which charges were entered/reviewed by certain users within the system. If a practice uses batching, you will need to use the newbatch API call to create a batch for your API user.

```
<ppmdmsg action="newbatch" class="batches" msgtime="8/31/2012 12:50:09 PM"/>
```

A batch number will be returned. From this point on, all charges for the API user will go to that batch in the Claims Center.

Generally, someone at the practice will overtake the API batch at the end of the day to review the charges and close it out. The API will then need to create another batch the following day.

A batch of A means Active. This is the batch that charges will flow to. A batch of O means Open. There can be multiple O batches under a user, but only one A batch.

Payment Checks

Create a Payment Check

Verb: POST

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/PaymentChecks`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/PaymentChecks`

Action: Create new Payment Check.

Parameters:

- "amount" – int32 (optional)
- "checkDate" – date in format "2022-01-31T15:44:11.549Z" (required)
- "checkNumber" – string (required)
- "carrierId" – int32 (optional)
- "paymentCodeId" – int32 (optional)
- "display" – boolean (optional)

Sample of Payload Request:

```
{  
  "amount": 1,  
  "checkDate": "2022-01-28T13:50:38.311Z",  
  "checkNumber": "string",  
  "carrierId": 7440,  
  "paymentCodeId": 490,  
}
```

```
    "display": true
  }
```

Sample of Successful Response:

```
{
  "amount": 1.0,
  "checkDate": "2022-01-28T13:50:38.311Z",
  "checkNumber": "string",
  "carrierId": 7440,
  "paymentCodeId": 490,
  "display": true,
  "id": 11
}
```

Get a Payment Check by Check Number

This is REST API.

Verb: GET

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/PaymentChecks?checkNumber={check number}>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/PaymentChecks?checkNumber=check>

Action: Retrieve a Payment Check by a check number.

Parameters:

- Query param – checkNumber – string

Sample of Successful Response:

```
[
  {
    "licenseKey": 991207,
    "checkBalance": 0.0000,
    "patientFirstName": null,
    "patientLastName": null,
    "patientMiddleName": null,
    "carrierCode": "CAL08",
    "paymentCode": "string",
    "amount": 0.0000,
    "checkDate": "2022-01-28T13:50:38.31",
    "checkNumber": "string",
    "carrierId": 7440,
    "paymentCodeId": 490,
    "display": null,
    "id": 2
  }
]
```

Get Payment Check by Id

This is REST API.

Verb: GET

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/PaymentChecks/{id}>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/PaymentChecks/2>

Action: Retrieve a Payment Check by its id.

Parameters:

- Path param – id – int32 (required)

Sample of Successful Response:

```
{
  "amount": 0.0000,
  "checkDate": "2022-01-28T13:50:38.31",
  "checkNumber": "string",
  "carrierId": 7440,
  "paymentCodeId": 490,
  "display": true,
  "id": 2
}
```

Update Payment Check

This is REST API.

Verb: PUT

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/PaymentChecks/{id}>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/PaymentChecks/2>

Action: Update the payment check.

Parameters:

- Path param – id – int32 (required)
- JSON Body:
 - "amount" – int32 (optional)
 - "checkDate" – string (date in format "2022-01-31T15:44:11.549Z") (required)
 - "checkNumber" – string (required),
 - "carrierId" – int32 (optional),
 - "paymentCodeId" – int32 (optional),
 - "display" – boolean (optional)

Sample of Payload Request:

```
{  
  "id": 2,  
  "amount": 0,  
  "checkDate": "2022-01-28T13:50:38.311Z",  
  "checkNumber": "string",  
  "carrierId": 7440,  
  "paymentCodeId": 491,  
  "display": true  
}
```

Sample of Successful Response:

```
{
  "amount": 0.0,
  "checkDate": "2022-01-28T13:50:38.311Z",
  "checkNumber": "string",
  "carrierId": 7440,
  "paymentCodeId": 491,
  "display": true,
  "id": 2
}
```

Delete Payment Check

This is REST API.

Verb: DELETE

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/PaymentChecks/{id}>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/PaymentChecks/2>

Action: Delete the payment check.

Parameters:

Path param – id – int32 (required)

Sample of successful response:

Status code: 204

Payment Codes

Create a Payment Code

Verb: POST

This is REST API.

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/PaymentCodes`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/PaymentCodes`

Action: Create a new Payment Code.

Parameters:

- "title" – string (required)
- "description" – string (required)
- "isReserved" – boolean (optional)
- "lastModified" – string (date in format "2022-01-28T13:56:40.755Z") (optional)

Sample of Successful JSON Request:

```
{
  "description": "string",
  "title": "New Code",
  "isReserved": true,
  "lastModified": "2022-01-28T13:56:40.755Z"
}
```

Sample of Successful Response:

492 - (It is an id of newly created object)

Get all Payment Codes

This is REST API.

Verb: GET

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/PaymentCodes`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/PaymentCodes`

Action: Retrieve all Payment Codes.

Sample of Successful Response:

```
[
  {
    "id": 9,
    "description": "JJ TEST",
    "title": "JJ",
    "isReserved": false,
    "lastModified": "2017-08-02T13:59:12.697"
  },
  {
    "id": 491,
    "description": "string",
    "title": "New Co2e",
    "isReserved": false,
    "lastModified": "2022"
```

}

Update a Payment Code

This is REST API.

Verb: PUT

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/PaymentCodes/{id}`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/PaymentCodes/491`

Action: Update existing Payment Code.

Parameters:

- "id" – int32 (required)
- "description" – string (required)
- "title" – string (required)
- "isReserved" – boolean (optional)
- "lastModified" – "2022-01-28T13:56:40.755Z" (optional)

Sample of Successful JSON Request:

{

```
"id": 495,  
"description": "My description",  
"title": "New_Code",  
"isReserved": false,  
"lastModified": "2022-02-01T05:18:28.12"  
}
```

Sample of Successful Response:

Status code: 200

Delete a Payment Code

This is REST API.

Verb: DELETE

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/PaymentCodes/{id}>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/PaymentCodes/491>

Action: Update existing Payment Code.

Parameters:

- Path parameters – Id – int32 – id of the code that should be deleted.

Sample of Successful Response:

Status code: 204

Payment Notes

Create a Payment Note

Verb: POST

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/Notes`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/Notes`

Action: Create a new Payment Note.

Parameters:

- "code" – string (required)
- "description" – string (required)
- "display" – boolean (optional)
- "lastModified" – string (date in format "2022-01-28T13:56:40.755Z") (optional)

Sample of Successful JSON Request:

```
{
  "code": "CODE01",
  "description": "string",
  "lastModified": "2022-01-31T10:38:55.314Z",
  "display": true
}
```

Sample of Successful Response:

```
{
  "code": "CODE01",
  "description": "string",
  "lastModified": "2022-02-01T05:37:57.3626338-08:00",
  "display": true,
  "id": 118
}
```

Get all Payment Notes

This is REST API.

Verb: GET

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/Notes>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/Notes>

Action: Retrieve all Payment Notes.

Sample of Successful Response:

```
[
  {
    "code": "111111",
    "description": "strn",
    "lastModified": "2022-01-31T04:11:04.397",
    "display": true,
    "id": 111
  }
]
```

```
    },  
    {  
      "code": "CODE01",  
      "description": "string",  
      "lastModified": "2022-02-01T05:37:57.363",  
      "display": true,  
      "id": 118  
    }  
  ]
```

Update Multiple Payment Notes

This is REST API.

Verb: PUT

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/Notes>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/Notes>

Action: Update all passed Payment Notes.

Parameters:

- Array of objects:
 - "id" – int32 (required)
 - "code" – string (required)

- "description" – string (required)
- "display" – boolean (optional)
- "lastModified" – string (date in format "2022-01-28T13:56:40.755Z") (optional)

Sample of Successful JSON Request:

```
[
  {
    "id": "118",
    "code": "CODE01",
    "description": "new description",
    "lastModified": "2022-01-31T10:38:55.314Z",
    "display": true
  }
]
```

Sample of Successful Response:

```
[
  {
    "code": "CODE01",
    "description": "new description",
    "lastModified": "2022-02-01T05:46:35.5847544-08:00",
    "display": true,
    "id": 118
  }
]
```

Delete a Payment Note

This is REST API.

Verb: DELETE

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/Notes/{id}>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/Notes/1>

Action: Delete the Payment Note with id specified.

Parameters:

- Path parameters – Id – int32 – id of the code that should be deleted.

Sample of a Successful Response:

Status code: 204

Get a Payment Note by Id

Verb: GET

Template of URL: <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/Notes/{id}>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/Notes/118>

Action: Retrieve the Payment Note with id specified.

Parameters:

- Path parameters:
 - Id – int32 – id of the code that should be updated.
- JSON Body:
 - "id" – int32 (required)
 - "code" – string (required)
 - "description" – string (required)
 - "display" – boolean (optional)
 - "lastModified" – string (date in format "2022-01-28T13:56:40.755Z") (optional)

Sample of Successful JSON Request:

```
{
  "id": "118",
  "code": "CODE01",
  "description": "One more description",
  "lastModified": "2022-01-31T10:38:55.314Z",
  "display": true
}
```

Sample of Successful Response:

```
{
  "code": "CODE01",
  "description": "One more description",
  "lastModified": "2022-02-01T06:48:59.933996-08:00",
}
```

```
    "display": true,  
    "id": 118  
  }
```

Payment Processing Accounts

Create a Payment Processing Account

This is REST API.

Verb: POST

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/PaymentProcessingAccounts`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/PaymentProcessingAccounts`

Action: Create a new Payment Processing account.

Parameters:

- JSON Body:
 - "accountName": string (required)
 - "publicApiKey": string (required)
 - "secondaryPublicApiKey": string (optional)
 - "secretApiKey": string (required)
 - "accountToken": string (required)
 - "paymentProcessor": int32 (optional)
 - "display": boolean (optional)
 - "paymentProcessingAccountId": int32 (optional)

Sample of successful JSON Request:

```
{
  "accountName": "Test Account 5",
  "publicApiKey": "string",
  "secondaryPublicApiKey": "string",
  "secretApiKey": "string",
  "accountToken": "string",
  "paymentProcessor": 2,
  "display": false,
  "paymentProcessingAccountId": 9
}
```

Sample of Successful Response:

```
{
  "accountName": "Test Account 5",
  "publicApiKey": "string",
  "secondaryPublicApiKey": "string",
  "secretApiKey": "string",
  "accountToken": "string",
  "paymentProcessor": 2,
  "display": false,
  "paymentProcessingAccountId": 9
}
```

Get All Payment Processing Accounts

This is REST API.

Verb: GET

Template of URL – https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/PaymentProcessingAccounts

Example – https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/PaymentProcessingAccounts

Action – Retrieve all Payment Processing accounts.

Sample of Successful Response:

```
[
  {
    "accountName": "LOCATION 1",
    "publicApiKey": null,
    "secondaryPublicApiKey": null,
    "secretApiKey": null,
    "accountToken":
"A928C168CE60510A3688EFFD8350A963C8C8249F47B1C6F7E5A54D2380D15
9E59859BB5EF64AC438F5",
    "paymentProcessor": 2,
    "display": true,
    "paymentProcessingAccountId": 1,
    "id": null
  },
  {
    "accountName": "LOCATION 2",
    "publicApiKey": null,
    "secondaryPublicApiKey": null,
    "secretApiKey": null,
    "accountToken":
"A689D168CE32140D3633EFFD8350A963C8C8249F47B1C6F7E5A54D2380D15
9E59859BB5EF64AC438F5",
    "paymentProcessor": 2,
    "display": true,
    "paymentProcessingAccountId": 2,
    "id": null
  }
]
```

]

Delete the Payment Processing Account by ID

This is REST API.

Verb: DELETE

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/PaymentProcessingAccounts/{id}`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/PaymentProcessingAccounts/1`

Action – Delete the Payment Processing account with specified id.

Parameters

- Path parameters:
 - Id: int32 – id of the code that should be deleted.

Sample of successful response:

Status code: 204

Get a Payment Processing Account by ID

This is REST API.

Verb: GET

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/PaymentProcessingAccounts/{id}`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/PaymentProcessingAccounts/9`

Action – Retrieve a Payment Processing account with id specified.

Parameters:

- Path parameters:
 - Id: int32 – id of the code that should be retrieved.

Sample of Successful Response:

```
{
  "accountName": "LOCATION 2",
  "publicApiKey": null,
  "secondaryPublicApiKey": null,
  "secretApiKey": null,
  "accountToken":
"A689D168CE32140D3633EFFD8350A963C8C8249F47B1C6F7E5A54D2380D15
9E59859BB5EF64AC438F5",
  "paymentProcessor": 2,
  "display": true,
  "paymentProcessingAccountId": 2,
  "id": null
}
```

Update a Payment Processing Account

This is REST API.

Verb: PUT

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payment/PaymentProcessingAccounts/{id}`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payment/PaymentProcessingAccounts/1`

Action – Update an existing Payment Processing account.

Parameters:

- Path parameters:
 - Id: int32 – id of the code that should be updated.
- JSON Body:
 - "accountName": string (required)
 - "publicApiKey": string (required)
 - "secondaryPublicApiKey": string (optional)
 - "secretApiKey": string (required)
 - "accountToken": string (required)
 - "paymentProcessor": int32 (optional)
 - "display": boolean (optional)
 - "paymentProcessingAccountId": int32 (optional)

Sample of Successful JSON Request:

```
{  
  "accountName": "Test Account 5",  
  "publicApiKey": "string",
```

```
"secondaryPublicKey": "string",  
"secretApiKey": "string",  
"accountToken": "string",  
"paymentProcessor": 2,  
"display": false,  
"paymentProcessingAccountId": 9  
}
```

Sample of Successful Response:

```
{  
  "accountName": "Test Account 5",  
  "publicApiKey": "string",  
  "secondaryPublicKey": null,  
  "secretApiKey": "string",  
  "accountToken": "string",  
  "paymentProcessor": 2,  
  "display": false,  
  "paymentProcessingAccountId": 9,  
  "id": 25  
}
```

Payment Reasons

Get all Payment Reasons

This is REST API.

Verb: GET

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/PaymentReasons`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/PaymentReasons`

Action – Retrieve all payment reasons.

Sample of Successful Response:

```
[
  {
    "code": "123",
    "description": "string",
    "lastModified": "2022-01-31T04:44:21.88",
    "display": null,
    "id": 90613
  },
  {
    "code": "AFTER",
    "description": "SERVICES PROVIDER AFTER TERMINATION OF COVERAGE",
    "lastModified": "2004-09-23T16:28:39.973",
    "display": null,
    "id": 4
  }
]
```

Create a New Payment Reason

This is REST API.

Verb: POST

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/PaymentReasons`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/PaymentReasons`

Action – Create a new payment reason.

Parameters:

- JSON Body:
 - "code": string (required)
 - "description": string (required)
 - "lastModified": string (date in format "2022-01-31T12:43:57.033Z") (optional)
 - "display": boolean (optional)

Sample of Successful JSON Request:

```
{
  "code": "CODE1",
  "description": "string",
  "lastModified": "2022-01-31T12:43:57.033Z",
  "display": true
}
```

Sample of Successful ReRspnse:

```
{
  "code": "CODE1",
  "description": "string",
  "lastModified": "2022-02-02T06:10:18.38",
  "display": null,
  "id": 90618
}
```

Update Existing Payment Reason

This is REST API.

Verb: PUT

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/PaymentReasons/{id}>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/PaymentReasons/90615>

Action – Update the payment reason with id specified.

Parameters:

- Path params:
 - Id – int32 (required)
- JSON Body:

- "id" : int32 (required)
- "code": string (required)
- "description": string (required)
- "lastModified": string (date in format "2022-01-31T12:43:57.033Z") (optional)
- "display": boolean (optional)

Sample of Successful JSON Request:

```
{  
  "id": "90615",  
  "code": "CODE2",  
  "description": "string",  
  "lastModified": "2022-01-31T12:43:57.033Z",  
  "display": false  
}
```

Sample of Successful Response:

```
{  
  "code": "CODE2",  
  "description": "string",  
  "lastModified": "2022-02-02T06:10:18.38",  
  "display": null,  
  "id": 90615  
}
```

Payments

Get Payments by Code

This is REST API.

Verb: GET

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payments?search={code}`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payments?search=test`

Action – Retrieve all payments with the specified code

Parameters:

- Query params:
 - code – string (required)

Sample of Successful Response:

[Work in progress]

Get Payments by ID

This is REST API.

Verb: GET

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payments/{id}`

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payments/1000>

Action – Retrieve all payments with the specified id.

Parameters:

- Path params:
 - Id – int32 (required)

Sample of Successful Response:

[Work in progress]

Create New Payment

This is REST API.

Verb: POST

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payments>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payments>

Action – Create a new payment with specified parameters.

Sample of Successful JSON Request:

```
{  
  "allowTransactionDuplicates": false,  
  "appointmentId": 10952397,  
}
```

```
"carrierId": null,
"charges": [],
"checkId": null,
"checkNumber": "",
"creditCardAuthorizationResponse": null,
"creditCardExpirationMonth": null,
"creditCardExpirationYear": null,
"creditCardLastFourDigits": null,
"creditCardName": null,
"creditCardOnFileId": null,
"creditCardToken": null,
"cvnFilled": false,
"depositDate": "2022-02-16",
"forceZipcodeMismatch": false,
"icnNumber": null,
"includeOnStatement": false,
"insurancePlan": null,
"isCreditCardPaymentWithoutProcessor": false,
"isRepost": false,
"maxMonthLimit": null,
"merchantAccountId": null,
"merchantDeviceId": null,
"note": "",
"patientId": 11080279,
"paySource": 4,
"paymentAmount": 20,
"paymentCode": "PP",
"paymentMethodId": "1",
"paymentProcessor": null,
"postingMethod": "Trans Entry",
"profileId": 3449,
"remarkCodesIds": null,
"requestMultiUseToken": false,
"respPartyId": 13046868,
```

```
"saveCCOF": false,
"sendReceipt": false,
"transactionId": null,
"unappliedPaymentAmount": 20,
"unappliedVisitId": 10952397,
"zipCode": "15136"
}
```

Sample of Successful Response:

```
{
  "paymentId": 7044893,
  "paymentAmount": 20,
  "receiptMessage": null,
  "ccofSaveResult": null,
  "creditCardOnFileModel": null
}
```

Create a Payment for a Responsible Party

This is REST API.

Verb: POST

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payments>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payments>

Action – Create a payment for the responsible party specified.

Sample of Successful JSON Request:

```
{
  "paymentProcessor": 1,
  "merchantAccountId": 0,
  "creditCardToken": "string",
  "zipCode": "string",
  "creditCardExpirationMonth": 4,
  "creditCardExpirationYear": 24,
  "creditCardLastFourDigits": "0493",
  "merchantDeviceId": 0,
  "creditCardOnFileId": 0,
  "transactionId": 0,
  "cardHolderName": "string",
  "cardType": "string",
  "bankTransactionId": "string",
  "referenceId": "string",
  "responseCode": "string",
  "responseText": "string",
  "deviceResponseCode": "string",
  "deviceResponseText": "string",
  "bankApprovalCode": "string",
  "avsResponseCode": "string",
  "cvvResponseCode": "string",
  "transactionStatus": 200,
  "chargeType": 10,
  "entryMethod": "string",
  "authorizationCode": "string",
  "isCardVerified": true,
  "excludeFromBillingWizard": true,
  "maxMonthLimit": 0,
  "paymentAmount": 10,
  "paymentMethodId": 0,
  "checkNumber": "string",
  "postingMethod": "string",
```

```
"postedBy": "string",
"allowTransactionDuplicates": true,
"creditCardAuthorizationResponse": "string",
"captured": true,
"customerReceipt": "string",
"sendReceipt": true,
"paymentCode": "string",
"depositDate": "2022-02-02T16:00:07.128Z",
"isRepost": true,
"creditCardName": "string",
"creditCardOnFileModel": {
  "id": 0,
  "sequence": 0,
  "name": "string",
  "partialCardNumber": "string",
  "expirationMonth": 0,
  "expirationYear": 0,
  "zipCode": "string",
  "availableAmount": 20,
  "maxMonthLimit": 0,
  "cardType": "string",
  "excludeFromBillingWizard": true,
  "managedUntilDate": "2022-02-02T16:00:07.128Z",
  "creditCardVerifyResponse": "string",
  "creditCardToken": "string",
  "merchantAccountId": 0,
  "transactionId": 0,
  "lastFourDigits": "string",
  "paymentProcessor": 1,
  "responsiblePartyId": 0,
  "creditResponse": {
    "paymentProcessor": 1,
    "merchantAccountId": 0,
    "creditCardToken": "string",
```

```

    "zipCode": "string",
    "creditCardExpirationMonth": 0,
    "creditCardExpirationYear": 0,
    "creditCardLastFourDigits": "string",
    "merchantDeviceId": 0,
    "creditCardOnFileId": 0,
    "transactionId": 0,
    "cardHolderName": "string",
    "cardType": "string",
    "bankTransactionId": "string",
    "referenceId": "string",
    "responseCode": "string",
    "responseText": "string",
    "deviceResponseCode": "string",
    "deviceResponseText": "string",
    "bankApprovalCode": "string",
    "avsResponseCode": "string",
    "cvvResponseCode": "string",
    "transactionStatus": 200,
    "chargeType": 10,
    "entryMethod": "string",
    "authorizationCode": "string",
    "isCardVerified": true,
    "excludeFromBillingWizard": true,
    "maxMonthLimit": 0
  },
  "isCardVerified": true
},
"respPartyId": 13046868,
"charges": [
  {
    "chargeDetailId": 0,
    "patientId": 11080279,
    "insurancePortion": 0,

```



```
"patientPortion": 0,
"patientBalance": 0,
"insuranceBalance": 0,
"updatedInsuranceBalance": 0,
"updatedPatientBalance": 0,
"amount": 10,
"allowedAmount": 10,
"writeOff": {
  "code": "string",
  "amount": 10
},
"riskWriteOff": {
  "code": "string",
  "amount": 10
},
"paymentStatus": "string",
"reasonCode": "string",
"profileId": 3449,
"paymentReasons": [
  {
    "id": 0,
    "amount": 10,
    "units": 1
  }
],
"remarkCodeIds": [
  0
],
"chargeAmount": 10,
"updatedPatientPortion": 0,
"updatedInsurancePortion": 0
}
],
"paySource": 4,
```

```
"profileId": 3449,  
"unappliedPaymentAmount": 10,  
"unappliedPaymentPatientId": 0,  
"chargeProcessingType": 0,  
"requestMultiUseToken": false,  
"saveCCOF": false  
}
```

Sample of Successful Response:

```
{  
  "code": "CODE2",  
  "description": "string",  
  "lastModified": "2022-02-02T06:10:18.38",  
  "display": null,  
  "id": 90615  
}
```

Open Batch

This is REST API.

Verb: POST

Template of URL – [https://providerapi.advancedmd.com/api/{HOST}/
{APPNAME}/transaction/Payments/openbatch](https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payments/openbatch)

Example – [https://providerapi.advancedmd.com/api/pm-api-
101/API/transaction/Payments/openbatch](https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payments/openbatch)

Action – Open a new batch for payments.

Sample of Successful Response:

656792 (id of newly created batch)

Unapply Payment Detail by ID

This is REST API.

Verb: POST

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payments/{id}/unapply`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payments/1/unapply`

Action – Unapply the payment specified.

Parameters:

- Path params:
 - Id – int32(required)

Sample of Successful Response:

```
{  
  "paymentDetailId": 1,  
  "paymentAmount": 0.0000,  
  "createdAt": "2019-09-12T13:46:38.797",  
  "profileCode": null,  
  "profileId": null,  
  "paymentId": 1,  
}
```

```
    "checkNumber": " ",
    "authorizationCode": null,
    "carrierCode": "",
    "paymentCode": "",
    "note": "",
    "appointmentId": null
}
```

Change Payment Detail Type to Void (by ID)

This is REST API.

Verb: POST

Template of URL – <https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/transaction/Payments/{id}/void>

Example – <https://providerapi.advancedmd.com/api/pm-api-101/API/transaction/Payments/1/void>

Action – Make the payment detail type to be "void".

Parameters:

- Path params:
 - Id – int32 (required)

Sample of Successful Response:

[Work in progress]

Add Payment Plan

Sample JSON:

```
{
  "ppmdmsg": {
    "respparty": {
      "visitlist": {
        "visit": {
          "chargelist": {
            "charge": {
              "@id": "5122007",
              "@paymentplan": "1"
            }
          }
        }
      }
    },
    "paymentplanlist": {
      "paymentplan": {
        "@date": "02/27/2023",
        "@payment": "150.00",
        "@totalcharges": "1500.00",
        "@interest": "0",
        "@annual": "0",
        "@duration": "10",
        "@totalpaymentplan": "1500.00"
      }
    },
    "@id": "149",
    "@amount": "1500"
  },
  "@action": "updatepaymentplan",
  "@class": "paymentplan",
  "@msgtime": "2/23/2023 12:25:19 PM",
  "@resppartyid": "149",
```

```
        "@patientid": "6018385"
      }
    }
  }
```

Example Response:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDWAPI3WFEYTVB" lst="2/27/2023 10:35:30 AM">
  <Results>
    <patientlist>
      <patient id="payplan982" patientid="pat6018385">
        <visitlist>
          <visit
            id="vst9569240"
            date="02/27/2023"
            isappt="0"
            profile="prof3"
            refplan="rplan6934635"
            preauth=""
            episode="eps5983325"
            insorder=""
            note=""
            forcepaper="0"
            onhcfa="1"
            acceptassign="1"
          >
            <chargelist>
              <charge
                id="charge5122008"
                seq="0005122008"
                createtime="2023/02/27 10:35:30"
                respparty="resp149"
```

begindate="02/27/2023"
enddate="02/27/2023"
begintime="10:35"
endtime="10:35"
duration="0"
proccode="pcode10567"
finclasscode="MC"
fee="1500.00"
netfee="0"
lineitemnote=""
units="1"
aging="02/27/2023"
pos="11"
tos="01"
allowed="0.00"
expected="0.00"
patportion="1500.00"
insportion="0.00"
patbalance="1500.00"
insbalance="0.00"
billins="0"
insbilled="0"
batchnumber="0"
entered="02/27/2023"
dayclosed="0"
paymentplan="1"
postedby="PPMD_KGRITSA"
void="0"
protected="0"
lastbilledcarrier=""
datebilled=""
voideddate=""
totalvisitcharges="1500.00"
note="1"

```
        />
      </chargelist>
      <extins />
      <authorizationlist />
    </visit>
  </visitlist>
</patient>
</patientlist>
</Results>
<Error />
</PPMDResults>;
```

Get Responsible Party Payment Plan

Action: getpaymentplan

Get a Responsible Party's payment plan(s)

```
<ppmdmsg action="getpaymentplan" class="paymentplan"
msgtime="2/8/2024 3:33:51 PM"
  ltq="2024-02-08 15:33:00 " patientid="109259"
  la="gettxhistory" lac="demographics"
  lat="416" let="1707431628472" lst="02/08/2024 14:33:48"/>
```

Results

Responsible Party has no payment plan response

```
<PPMDResults s="advancedmd-api-processrequest-55c859cffd-
txcfb" lst="02/08/2024 14:33:51">
  <Results>
    <resppartylist>
      <respparty id="120359" name="BACH,SABASTION"
laststatementdate="2024-02-08T14:33:51.930">
        <paymentplanlist>
          <paymentplan/>
        </paymentplanlist>
        <chargelist>
          <charge id="charge252134" proccode="99214"
patientid="pat109259" patientname="SABASTION BACH"
provcode="YOU27" provname="YOUNG, KATHY"
begindate="05/28/2015" patbalance="61.89" paymentplan="0"/>
        </chargelist>
      </respparty>
    </resppartylist>
  </Results>
  <Error/>
</PPMDResults>
```

Responsible Party has a payment plan response

```
<PPMDResults s="advancedmd-api-processrequest-55c859cffd-
b7lgj" lst="02/08/2024 14:36:39">
  <Results>
    <resppartylist>
      <respparty id="120359" name="BACH,SABASTION"
laststatementdate="2024-02-08T14:36:39.600">
        <paymentplanlist>
          <paymentplan id="960" totalcharges="61.89"
payment="11.05" totalpaymentplan="66.30" date="02/09/2024"
duration="6" interest="2" annual="0"/>
        </paymentplanlist>
        <chargelist>
          <charge id="charge252134" proccode="99214"
patientid="pat109259" patientname="SABASTION BACH"
provcode="YOU27" provname="YOUNG, KATHY"
begindate="05/28/2015" patbalance="61.89" paymentplan="1"/>
          <charge id="charge5324260" proccode="#INT"
patientid="pat109259" patientname="SABASTION BACH"
provcode="YOU27" provname="YOUNG, KATHY"
begindate="02/08/2024" patbalance="4.41" paymentplan="1"/>
        </chargelist>
      </respparty>
    </resppartylist>
  </Results>
  <Error/>
</PPMDResults>
```

Create or Update Responsible Party Payment Plan

Action: updatepaymentplan

Sample XML:

```
<ppmdmsg action="updatepaymentplan" class="paymentplan"
msgtime="2/8/2024 3:35:37 PM" ltq="2024-02-08 15:33:00 "
resppartyid="120359" patientid="109259" la="getpaymentplan"
lac="paymentplan" lat="306" let="1707431631758"
lst="02/08/2024 14:33:51">

  <respparty id="120359" amount="4.41">
    <visitlist>
      <visit>
        <chargelist>
          <charge id="charge252134"
paymentplan="1"/>
        </chargelist>
      </visit>
    </visitlist>
    <paymentplanlist>
      <paymentplan date="02/09/2024" payment="11.05"
totalcharges="61.89" interest="2" annual="0" duration="6"
totalpaymentplan="66.30"/>
    </paymentplanlist>
  </respparty>
</ppmdmsg>
```

Results

Sample XML:

```
<PPMDResults s="advancedmd-api-processrequest-55c859cffd-b71gj"
lst="02/08/2024 14:35:37">
  <Results>
    <patientlist>
      <patient id="payplan960" patientid="pat109259">
```

```

<visitlist>
    <visit id="vst9640684" date="02/08/2024"
isappt="0" profile="prof3" refplan="rplan109323" preauth=""
episode="eps108296" insorder="" note="" forcepaper="0"
onhcfa="1" acceptassign="1">
        <chargelist>
            <charge id="charge5324260"
seq="0005324260" createtime="2024/02/08 14:35:37"
respparty="resp120359" begindate="02/08/2024"
enddate="02/08/2024" begintime="14:35" endtime="14:35"
duration="0" proccode="pcode10567" finclasscode="MC" fee="4.41"
netfee="0" lineitemnote="" units="1" aging="02/08/2024" pos="11"
tos="01" allowed="0.00" expected="0.00" patportion="4.41"
insportion="0.00" patbalance="4.41" insbalance="0.00"
billins="0" insbilled="0" batchnumber="0" entered="02/08/2024"
dayclosed="0" paymentplan="1" postedby="PPMD_CSCHELL" void="0"
protected="0" lastbilledcarrier="" datebilled="" voideddate=""
totalvisitcharges="4.41" note="1"/>
        </chargelist>
        <extins/>
        <authorizationlist/>
    </visit>
</visitlist>
</patient>
</patientlist>
</Results>
<Error/>
</PPMDResults>

```

Get Claim Status

JSON Example:

```
{
  "ppmdmsg": {
    "@action": "request",
    "@class": "claimstatus",
    "@msgtime": "9/4/2024 2:22:19 PM",
    "@carriercode": "UNI34",
    "@visitid": "88033"
  }
}
```

Example Response:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-776bc9c6d7-
rsxdb" lst="09/10/2024 14:23:56">
  <Results patientname="PATIENT NAME " dos="2024-08-
20T00:00:00" visitid="88033">
    <carrierlist>
      <carrier name="UMR" code="UNI34" seq="1"
lastbilleddate="2024-08-21 15:54" subscribename="SUBSCRIBER
NAME" policynumber="policy number " groupnumber="11-111111"
address="Payor Address" phone="" website="" />
    </carrierlist>
    <claimstatuslist>
      <claimstatus id="568" carriercode="UNI34"
claimid="88033A" verifiedat="2024-09-04 11:04"
createdby="PPMD_KGRITSA" requeststatusid="200"
createdat="2024-09-04T11:04:11.900">
        <claimstatusdetaillist>
          <claimstatusdetail categorycode="A4"
statuscode="35" paymentamount="0.0000" icnnumber="999999999"
/>
        </claimstatusdetaillist>
      </claimstatus>
    </claimstatuslist>
  </Results>
</PPMDResults>
```

```

    </claimstatuslist>
    <categoryodelist>
      <categorycode code="A4"
description="Acknowledgement/Not Found-The claim/encounter can
not be found in the adjudication system." />
      <categorycode code="E1" description="Response not
possible - System Status" />
    </categoryodelist>
    <statusodelist>
      <statuscode code="0" description="Cannot provide
further status electronically." />
      <statuscode code="35" description="Claim/encounter
not found." />
    </statusodelist>
  </Results>undefined
</PPMDResults>

```

Claim Status Codes: <https://x12.org/codes/claim-status-codes>

Eligibility

In order to check the Insurance Eligibility you need to execute 2 calls:

- Eligibility Check
- Response Check

Eligibility Check

Specify the patientUID and insplanid from the getdemographic call.

Sample XML:

```
<ppmdmsg action="submitdemandrequest" class="atseligibility"
msgtime="3/6/2014 1:29:11 PM" patientid="38079"
insurancecoverageid="15605"
"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "submitdemandrequest",
    "@class": "atseligibility",
    "@msgtime": "4/7/2025 6:23:29 PM",
    "@eligibilitystc": "30",
    "@patientid": "11479886",
    "@insurancecoverageid": "5910799"
  }
}
```

You are then returned the eligibilityid.

Sample XML Response:

```
<PPMDResults s="CB-PM21" lst="3/6/2014 12:29:10 PM"><Results  
  eligibilityid="522039" eligibilitystatusid="0"  
  eligibilitycreatedat="03/06/2014 12:29PM"  
  success="1"/></PPMDResults>
```

Run the checkeligibilityresponse call using the eligibilityid.

Sample JSON Response:

```
<?xml version='1.0' encoding='ISO-8859-1'?>  
<PPMDResults s="advancedmd-api-processrequest-7-596f9d7664-  
55z66" lst="04/07/2025 17:30:36">  
  <Results eligibilityid="6087468" eligibilitystatusid="0"  
  eligibilitystc="30" eligibilitycreatedat="04/07/2025 5:30PM"  
  />  
</PPMDResults>
```

Response Check

Here you will use the eligibilityID from the previous call

Sample XML:

```
<ppmdmsg action="CheckEligibilityResponse" class="eligibility"  
  msgtime="3/6/2014 1:29:26 PM" eligibilityid="522039"  
  />
```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "CheckEligibilityResponse",
    "@class": "eligibility",
    "@msgtime": "4/7/2025 6:23:45 PM",
    "@eligibilityid": "6087467"
  }
}

```

Sample XML Response:

```

<?xml version='1.0' encoding='ISO-8859-1'?><PPMDResults s="CB-
API03" lst="8/11/2016 1:26PM"><Results eligibilityid="24"
eligibilitystatusid="1" eligibilitycreatedat="08/11/2016
eligibilitychangedat="08/11/2016 12:45PM"
eligibilityrespondedate="08/11/2016 12:45PM"
eligibilityvalidation="" eligibilityvalidationfollowup=""
patientname="TEST,TEST" address1="APPLE ST" address2=""
city="SANDY" state="UT" zipcode="91326 " dob="1972-06-
18T00:00:subscriberid="18169"
insuranceeffectivestartdate="01/01/2016"
insuranceeffectiveenddate=""><xmlns:xsi="http://www.w3.org/200
1/XMLSchema-instance"
xmlns:xsd="http://www.w3.org/2001/XMLSchema"><InterchangeContr
olHeader ISA01_
AuthorizationInformationQualifier="00" ISA02_
AuthorizationInformation=" " ISA03_
SecurityInformationQualifier="00" ISA04_SecurityInformation="
" ISA05_
SenderInterchangeIdQualifier="ZZ" ISA06_
SendersInterchangeId="MCKESSON_TSH " ISA07_
ReceiverInterchangeIdQualifier="ZZ" ISA08_
ReceiversInterchangeId="007454 "
</MessageTexts><EligibilityOrBenefitAdditionalInformation><Eli
gibilityOrBenefitAdditionalInformation
III01_CodeListQualifierCode="ZZ" III02_IndustryCode="20"

```

```

III03_CodeCategory="" III04_
FreeFormMessageText="" III05_Quantity="" III06_
CompositeUnitOfMeasure=""/></EligibilityOrBenefitAdditionalInf
ormation></EligibilityOrBenefitInforma
tion></EligibilityOrBenefitInformation></Name></SubscriberDeta
il></TransactionSet></TransactionSets>
<FunctionalGroupTrailer GE01_NumberOfTransactionSets="1" GE02_
GroupControlNumber="1"/><InterchangeControlTrailer IEA01_
NumberOfFunctionalGroups="1" IEA02_
InterchangeControlReference="000000001"/></Edi271></Results></
PPMDResults>

```

Sample JSON Response:

This call returns XML by default, you need to use Accept Application/Json on the header to retrieve it as Json.

LookUpEligibilitySTC

Obs: If there is an EligibilitySTC not available on the HardCode values of this documentation, please use **LookUpEligibilitySTC** to retrieve the list of available values.

List of acceptable values for the EligibilitySTC check.

Sample XML:

```

<ppmdmsg action="lookupeligibilitystc" class="lookup"
msgtime="4/7/2025 6:19:22 PM" exactmatch="0" code="30"
orderby="code" page="1" />

```

Sample JSON:

```

{
  "ppmdmsg": {
    "@action": "lookupeligibilitystc",
    "@class": "lookup",
    "@msgtime": "4/7/2025 6:19:22 PM",
    "@exactmatch": "0",
    "@code": "",
    "@orderby": "code",
    "@page": "1"
  }
}

```

Sample XML Response:

```

<PPMDResults s="advancedmd-api-processrequest-7-596f9d7664-
55z66" lst="04/07/2025 17:42:14">
  <Results>
    <eligibilitystclist>
      <eligibilitystc id="12" code="30" name="Health
Benefit Plan Coverage"/>
    </eligibilitystclist>
  </Results>
  <ticklersdue countDue="0" countSeen="0" ltq="2025-04-07
18:42:12 " resolutionitems="0" olsresolutionitems="0"
admin="1"/>
  <notificationtypelist>
    <notificationtype name="Critical Alert" count="0"/>
    <notificationtype name="Maintenance" count="0"/>
    <notificationtype name="Public Alert Incident"
count="0"/>
    <notificationtype name="System Alerts" count="2"/>
  </notificationtypelist>
</PPMDResults>

```

Sample JSON Response:

```
{
  "PPMDResults": {
    "Results": {
      "eligibilitystclist": {
        "eligibilitystc": [
          {
            "_id": "1",
            "_code": "1",
            "_name": "Medical Care"
          },
          {
            "_id": "2",
            "_code": "2",
            "_name": "Surgical"
          }
        ]
      }
    },
    "_s": "advancedmd-api-processrequest-7-596f9d7664-  
p22qw",
    "_lst": "04/07/2025 17:21:31"
  }
}
```

Note: All response codes can be found in the **Hard Coded Values** help file.

Upload Bank File

Verb: POST

Example Call

```
curl --location POST
'https://providerapi.advancedmd.com/api/api-
801/TEMP/paymentreconciliation/BankFile/UploadBankFile' \
--header 'Authorization: ..... ' \
--form
'ofxFile=@"/C:/Users/username/Desktop/anotherrewrewr.ofx"' -
this is file we send
```

Get Auto Match Details

Verb: GET

Example Call

```
curl --location GET  
'https://providerapi.advancedmd.com/api/api-  
801/TEMP/paymentreconciliation/Reconciliation/GetAutoMatchData  
ils' \  
--header 'Authorization: .....'
```

Save Reconciliation

Verb: POST

Example Call

```
curl --locationPOST 'https://providerapi.advancedmd.com/api/api-801/TEMP/paymentreconciliation/Reconciliation/SaveReconciliation' \
--header 'Content-Type: application/json' \
--header 'Authorization: ..... ' \
--data '[
{
  "depositstatusid": 0,
  "erastatusid": 0,
  "bankfiledetailid": 0,
  "erareportid": 0
}
]'
```

Lookup Actions

Searching for a patient, responsible party, or system settings (master file)

All "lookup" actions are formatted as follows:

Sample XML:

```
<ppmdmsg action="lookuppatient" class="api" msgtime="5/22/2015
3:02:39 PM" name="ami,mon" page="1"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "lookuppatient",
    "@class": "api",
    "@msgtime": "5/22/2015 3:02:39 PM",
    "@name": "ami,mon",
    "@page": "1"
  }
}
```

Available Lookups:

The following table lists the lookup actions available and the applicable attributes. Links open specific examples.

Action	Item	Attributes (Lookup Criteria)								
		na m e	ch art	acct num	s s n	ph on e	d o b	vi si t	co de	spec ialty
lookupac	Accou	X							X	

cttype	nt Type									
look- upcarrier	Car- rier	X								
lookupdi agcode	Diagn osis Code	X							X	
look- upfacility	Facil- ities	X								
lookupfin class	Finan cial Class	X							X	
look- upmar- source	Refer- ral Sourc- e									
look- upmarsta- tus	Refer- ral Status									
lookupm odcode	Modifi er Code	X							X	
lookupno tetypes	Note Types								X	
lookuppa tient	Patien t	X	X		X	X	X	X		
lookuppr occode	Proce dure Code	X							X	
lookuppr ofile	Profile	X							X	
lookuppr ovider	Provi der	X							X	
lookupre	Referr	X							X	X

fprovider	ing Provi der									
lookupre sparty	Respo nsible Party	X		X	X	X	X			
lookupzi pcode	ZIP Code	X							X	

Note:

- *The action will need one of the following lookup criteria (for example, code or name should be part of the xml request, otherwise the engine might send an error back. We do not recommend to use multiple search criteria simultaneously. This call is meant for use with only one search criteria at a time.*
- *Specify the attribute codeset="10" in the lookupdaigcode call when looking up ICD10 codes. This will auto import the code into the office key.*

Look up criteria:

- **name:** This generally represents either the name or description of the item. In the case of ZIP Codes, it represents the City (City, State) that the ZIP Code corresponds to.
- **chart:** The patient's chart number. Alphanumeric.
- **acctnum:** The responsible party's account number
- **ssn:** The patient's or responsible party's Social Security Number
- **phone:** The patient's or responsible party's home phone number
- **dob:** The patient's or responsible party's date of birth (any valid date format, but pref. "mm/dd/yyyy")
- **visit:** A visit number associated with the patient

- **code:** Most system settings (master files) in AdvancedMD have codes associated with them
- **codeset:** (Only applies to lookupdiagcode): The codeset (ICD-9 or ICD-10) the code belongs to.
- **specialty:** The referring provider's specialty

Results:

The results of a lookup request vary according to the item. Example:

Sample XML:

```
<PPMDResults>
  <Results>
    <finclasslist>
      <finclass id="fclass4" code="FF" name="FULL
FEE SCHEDULE" billins="1" billlab="1" acceptassign="1"
responsible="1" allowfeesched="feesch21093"/>
    </finclasslist>
    <feeschedlist>
      <feesched id="feesch21093" name="ALLOWABLE"
type="A"/>
    </feeschedlist>
  </Results>
  <Error/>
</PPMDResults>
```

Sample JSON:

```
{
  "PPMDResults": {
    "Results": {
      "finclasslist": {
```

```

    "finclass": {
      "@id": "fclass4",
      "@code": "FF",
      "@name": "FULL FEE SCHEDULE",
      "@billins": "1",
      "@billlab": "1",
      "@acceptassign": "1",
      "@responsible": "1",
      "@allowfeesched": "feesch21093"
    }
  },
  "feeschedlist": {
    "feesched": {
      "@id": "feesch21093",
      "@name": "ALLOWABLE",
      "@type": "A"
    }
  }
},
"Error": null
}
}

```

Notice in this example that a **<feesched>** element is returned along with the **<finclass>** element. This is because one of the attributes of the **<finclass>** element is the allowable fee schedule (**allowfeesched**) associated with the financial class. This is common, since each lookup dialog in AdvancedMD may display any number of details about the returned items.

Notes

- *The page attribute is currently only valid for lookuppatient, lookuppresparty, and lookupcarrier, since those lookups frequently return*

a large number of elements and the lookup dialogs are limited to 50 items per call. The attribute is not required and should be omitted unless you need to deal with more than 50 returned elements.

- In most cases, items are returned that start with the value of the criteria attribute. For example, if the attribute code="FF" is submitted, then all items with a code starting with the letters "FF" will be returned. Exceptions include name, which, if prefixed with the character "%", will find names that contain the criteria string; and date, which generally expects the entire date, but will try to guess if only a year is submitted, for example.*
- The exactmatch attribute is used to indicate that if an exact match is found, then ONLY that item should be returned. For example, if a patient named "DOE,JOHN" and a patient "DOE,JOHN Q" both exist in the database, and you do a patient lookup with name="DOE,JOHN", then only the first patient will be returned if exactmatch="1", whereas both patients would be returned otherwise. This attribute is used for front-end application functionality; in most cases, you will probably want to omit this attribute or set it to "-1".*

Searching for a Patient, Responsible Party, or Master File

Sample Document

All "lookup" requests are formatted as following:

Sample XML:

```
<ppmdmsg action="lookuppatient" class="api" msgtime="5/22/2015
3:02:39 PM" name="ami,mon" page="1"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "lookuppatient",
    "@class": "api",
    "@msgtime": "5/22/2015 3:02:39 PM",
    "@name": "ami,mon",
    "@page": "1"
  }
}
```

Available Lookups

The following table lists the lookup actions available, and the applicable attributes:

Action	Item	Attributes (Lookup Criteria)								
		na m	ch ar	acct nu	s s	ph on	d o	vi si	c o	spe cialt

		e	t	m	n	e	b	t	d e	y
lookuppatient	Patient	X	X		X	X	X	X		
lookuprespparty	Responsible Party	X		X	X	X	X			
lookupprovider	Provider	X							X	
lookupprofile	Profile	X							X	
lookuprefprovider	Referring Provider	X							X	X
lookupfinancialclass	Financial Class	X							X	
lookupaccounttype	Account Type	X							X	
lookupzipcode	Zip Code	X							X	
lookupnotetypes	Note Types								X	
lookupprocedurecode	Procedure Code	X							X	
lookupdiagnosiscode	Diagnosis Code	X							X	
lookupmodifiercode	Modifier	X							X	

	Code									
--	------	--	--	--	--	--	--	--	--	--

Notes:

- *The request will need one of the following lookup criteria (for example, code or name should be part of the xml request otherwise the engine might send an error back. Please be aware that it is not recommended to use multiple search criteria simultaneously. This call is meant for use with only one search criteria at a time.*
- *Please specify the attribute codeset="10" in the lookupdaigcode call when looking up ICD10 codes. This will auto import the code into the office key.*

Lookup Criteria:

- name – This generally represents either the name or description of the item. In the case of zip codes, it represents the City (City, State) that the zip code corresponds to.
- chart – The patient's chart number. Alphanumeric.
- acctnum – The responsible party's account number
- ssn – The patient's or responsible party's Social Security Number
- phone – The patient's or responsible party's home phone number
- dob – The patient's or responsible party's date of birth (any valid date format, but pref. "mm/dd/yyyy")
- visit – A visit number associated with the patient
- code – Most master files in AdvancedMD have codes associated with them

- codeset – (Only applies to lookupdiagcode): The codeset (ICD-9 or ICD-10) the code belongs to.
- specialty – The referring provider's specialty

Results:

The results of a lookup request vary according to the item.

Sample XML:

```
<PPMDResults>
  <Results>
    <finclasslist>
      <finclass
        id="fclass4"
        code="FF"
        name="FULL FEE SCHEDULE"
        billins="1"
        billlab="1"
        acceptassign="1"
        responsible="1"
        allowfeesched="feesch21093"
      />
    </finclasslist>
    <feeschedlist>
      <feesched id="feesch21093" name="ALLOWABLE" type="A" />
    </feeschedlist>
  </Results>
  <Error />
</PPMDResults>;
```

Sample JSON:

```
{
```

```

"PPMDResults": {
  "Results": {
    "finclasslist": {
      "finclass": {
        "@id": "fclass4",
        "@code": "FF",
        "@name": "FULL FEE SCHEDULE",
        "@billins": "1",
        "@billllab": "1",
        "@acceptassign": "1",
        "@responsible": "1",
        "@allowfeesched": "feesched21093"
      }
    },
    "feeschedlist": {
      "feesched": {
        "@id": "feesched21093",
        "@name": "ALLOWABLE",
        "@type": "A"
      }
    }
  },
  "Error": null
}

```

Notice in this example that a <feesched> element is returned along with the <finclass> element. This is because one of the attributes of the <finclass> element is the allowable fee schedule (allowfeesched) associated with the financial class. This is common, since each lookup dialog in AdvancedMD may display any number of details about the returned items.

Notes:

- *The page attribute is currently only valid for lookuppatient, lookuprespparty, and lookupcarrier, since those lookups frequently return a large number of elements and the lookup dialogs are limited to 50 items per call. The attribute is not required and should be omitted unless you need to deal with more than 50 returned elements.*
- *In most cases, items are returned that start with the value of the criteria attribute. For example, if the attribute code="FF" is submitted, then all items with a code starting with the letters "FF" will be returned. Exceptions include name, which, if prefixed with the character "%", will find names that contain the criteria string; and date, which generally expects the entire date, but will try to guess if only a year is submitted, for example.*
- *The exactmatch attribute is used to indicate that if an exact match is found, then ONLY that item should be returned. For example, if a patient named "DOE,JOHN" and a patient "DOE,JOHN Q" both exist in the database, and you do a patient lookup with name="DOE,JOHN", then only the first patient will be returned if exactmatch="1", whereas both patients would be returned otherwise. This attribute is used for front-end application functionality; in most cases, you will probably want to omit this attribute or set it to "-1".*
- *When using the "lookupproccode" action, be aware that you should consider using a sub-element to filter the results to procedure codes or macro codes. The element to include is <subtype name="TYPE_NAME"/> where TYPE_NAME may be "macro" or "proccode".*
- *When using the "lookupdiagcode" action:*
 1. *You should specify the ICD-9 or ICD-10 codeset using the codeset="9" or codeset="10" attribute in the root (ppmdmsg) element. If you don't specify a codeset, it is assumed that you are looking for an ICD-9 diagnosis code.*
 2. *The "lookupdiagcode" action has a unique feature that no other lookup action has: If the code that you look up does not exist in the database that you are searching, but it is a valid ICD-9 or ICD-10 code*

(depending on the codeset attribute), it will automatically be imported into the database, and the new diagnosis code will be returned.

Look Up Carrier

Action:lookupcarrier

Sample XML:

```
<ppmdmsg action="lookupcarrier" class="api" msgtime="8/12/2019
3:39:01 PM" exactmatch="0" name="L" orderby="name" page="1">
<subtype filter-activeonly="true"/>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg" : {
    "@action": "lookupcarrier",
    "@class" : "api",
    "@msgtime": "6/19/2018 11:24:41 AM",
    "@exactmatch": "0",
    "@name" : "L",
    "@orderby" : "name",
    "@page" : "2",
    "@nocookie" : "0"
  }
}
```

Attributes:

- **Required: name** (can contain starting letter or entire string *not case sensitive*). A criteria may be specified using the "%" symbol.
- The request returns 50 results per page, therefore they are split into pages. (With the attributes page we have access to the rest of the results.)
- If the **exactmatch** attribute is set to **1**, only the exact matching **name** result/results will be returned. If left by default as **0**, all results containing the **name** attribute will be returned.

Result:

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFE5AP9B" lst="5/13/2021 2:11:18 AM">
  <Results>
    <carrierlist itemcount="2" page="1" pagecount="1"
itemsfrom="1" itemsto="2">
      <carrier id="car7484" code="LAN04" name="LANDCAR
CASUALTY COMPANY" cpid="">
        <address zip="84070" city="SANDY" state="UT" address1=""
address2="9350 S 150 E STE 1000" areacode="801" />
      </carrier>
      <carrier id="car7485" code="LWP01" name="LWP
CLAIMS SOLUTIONS INC" cpid="">
        <address zip="84127-0008" city="SALT LAKE
CITY"
state="UT" address1="" address2="PO BOX 27008" areacode="801"
/>
      </carrier>
    </carrierlist>
  </Results>
  <Error />
</PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFECJPSW",
    "@lst": "5/13/2021 2:15:13 AM",
    "Results": {
```

```
    "carrierlist": {
      "@itemcount": "2",
      "@page": "2",
      "@pagecount": "1",
      "@itemsfrom": "51",
      "@itemsto": "50"
    }
  },
  "Error": null
}
```

Look Up Collector

JSON Example:

```
"ppmdmsg": {
  "@nocookie": 1,
  "usercontext":
"991024GZZ/PmVj5ITUUOuVrOPgKaAaA15opfv2t1I05cryQwzVpsCKbb6rAk7
nb6eVF8ePIGy5/2/ErX1kE60ehMe65W9EVz67Qeps9/ieDM19cJ8g+fUrP9mBM
DCAo6vteUih8Hg0go8264SR7zWRNLM7wo2+5Njgu7iJkprtNnFa43DBVw5Gt5P
WKiR+3VVNFd3fjw9dyngyZPwTa3M720liRggq5LZ38TFqbxvAIx120whKNpnu9
f9qqaT1zVpbm0pi",
  "@class": "lookup",
  "@action": "lookupcollector",
  "@exactmatch": "0",
  "subtype": {
    "@name": "account"
  },
  "@code": "",
  "@msgtime": "2023-12-04 15:49:03"
}
```

Look Up Diag Code

Action:lookupdiagcode

Notes: When using the "lookupdiagcode" action:

- You should specify the ICD-9 or ICD-10 codeset using the codeset="9" or codeset="10" attribute in the root (ppmdmsg) element. If you don't specify a codeset, it is assumed that you are looking for an ICD-9 diagnosis code.
- The "lookupdiagcode" action has a unique feature that no other lookup action has: If the code that you look up does not exist in the database that you are searching, but it is a valid ICD-9 or ICD-10 code (depending on the codeset attribute), it will be automatically imported into the database, and the new diagnosis code will be returned.
- If the **exactmatch** attribute is set to **1**, only the exact matching name result/results will be returned. If left by default as **0**, all results containing the **name** attribute will be returned.
- If the result from the **exactmatch 1** is empty, the system will retrieve the result of the **exactmatch 0** as a way to propose alternatives for the search.

Sample XML:

```
<ppmdmsg action="lookupdiagcode" class="api"
msgtime="3/22/2021
10:11:06 AM" exactmatch="-1" code="300.01" page="1" />
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "lookupdiagcode",
    "@class": "api",
```

```
        "@msgtime": "4/1/2021 2:16:55 PM",
        "@exactmatch": "1",
        "@code": "A48",
        "@page": "1",
        "@nocookie": "0",
        "@codeset": "10"
    }
}
```

Example Result:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-4-6fd45cc477-
hvkpc" lst="04/07/2025 16:47:34">
  <Results>
    <diagodelist>
      <diagcode id="dcode1033896771" code="A48"
name="OTHER BACTERIAL DISEASES, NOT ELSEWHERE CLASSIFIED" />
    </diagodelist>
  </Results>
</PPMDResults>
```

Look Up Facilities

Action:lookupfacility (selectfacilities)

Sample XML:

```
<ppmdmsg action=" lookupfacility" class="api"
msgtime="6/19/2018
11:24:41 AM" type="0"/>
```

Sample JSON:

```
{
  "ppmdmsg" : {
    "@action": " lookupfacility",
    "@class" : "api",
    "@msgtime": "6/19/2018 11:24:41 AM",
    "@type": "0",
    "@nocookie" : "0"
  }
}
```

Attributes:

- **Required:** *action* and *class*

Result:

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFEVWPLE" lst="5/13/2021 4:31:10 AM">
  <record licensekey="991207" uid="1" facilitycode=""
code="" facilityname="" facilitytype="0" licensenumber=""
userfacilityid="" facilityynpi="" facilityclia="" address1=""
address2="" zipcode="" city="" state="" countrycode=""
areacode="" contactname="" email="" officephone=""
includeinportal="1" includeonclaims="1" facilitytypefid=""
```

```

billclassfid="" googleplaceid="" color="" display="0"
changedat="9/8/2004 12:41:32 PM" pos="" facilityalias=""
facilityaliasid="" />

<record licensekey="991207" uid="2" facilitycode="AOG"
code="AOG" facilityname="ARCHES OBSTETRICS AND GYNECOLOGY"
facilitytype="0" licensenumber="" userfacilityid=""
facilitynpi="" facilityclia="" address1="SUITE 110"
address2="2525 CHURCHILL DRIVE" zipcode="36111"
city="MONTGOMERY" state="AL" countrycode="USA" areacode="334"
contactname="" email="" officephone="(334) 984-9500"
includeinportal="0" includeonclaims="1" facilitytypefid=""
billclassfid="" googleplaceid="" color="" display="0"
changedat="9/7/2007 12:09:56 PM" pos="" facilityalias=""
facilityaliasid="" />

<record licensekey="991207" uid="4" facilitycode="APED"
code="APED" facilityname="ARCHES PEDIATRICS" facilitytype="0"
licensenumber="" userfacilityid="" facilitynpi=""
facilityclia="" address1="SUITE 110" address2="2525 CHURCHILL
DRIVE" zipcode="36111" city="MONTGOMERY" state="AL"
countrycode="USA" areacode="334" contactname="" email=""
officephone="(334) 984-9500" includeinportal="0"
includeonclaims="1" facilitytypefid="" billclassfid=""
googleplaceid="" color="" display="0" changedat="9/7/2007
12:10:00 PM" pos="" facilityalias="" facilityaliasid="" />

<record licensekey="991207" uid="95" facilitycode="AWC"
code="AWC" facilityname="ALABAMA WOMEN'S CENTER"
facilitytype="2" licensenumber="" userfacilityid=""
facilitynpi="8455122557" facilityclia="" address1=""
address2="5125 HIGHLAND DRIVE" zipcode="36111-3323"
city="MONTGOMERY" state="AL" countrycode="USA" areacode="334"
contactname="" email="" officephone="(334) 985-1212"
includeinportal="0" includeonclaims="1" facilitytypefid=""
billclassfid="" googleplaceid="" color="" display="1"
changedat="3/7/2012 5:41:59 PM" pos="" facilityalias=""
facilityaliasid="" />

<record licensekey="991207" uid="96" facilitycode="LCS"
code="LCS" facilityname="LABCORPS" facilitytype="1"
licensenumber="" userfacilityid="" facilitynpi="5412112158"
facilityclia="" address1="" address2="182 WRIGHT BROTHERS
DRIVE" zipcode="36111-3323" city="MONTGOMERY" state="AL"
countrycode="USA" areacode="334" contactname="" email=""
officephone="(334) 551-2581" includeinportal="0"
includeonclaims="1" facilitytypefid="" billclassfid=""
googleplaceid="" color="" display="1" changedat="3/7/2012
5:41:52 PM" pos="" facilityalias="" facilityaliasid="" />

<record licensekey="991207" uid="3" facilitycode="MSC"
code="MSC" facilityname="MONTGOMERY SURGICAL CENTER"
facilitytype="2" licensenumber="" userfacilityid=""
facilitynpi="4569873217" facilityclia="" address1=""
address2="9672 MAIN ST" zipcode="36111-3323" city="MONTGOMERY"
state="AL" countrycode="USA" areacode="334" contactname=""
email="" officephone="(334) 954-8778" includeinportal="0"

```

```

includeonclaims="1" facilitytypefid="" billclassfid=""
googleplaceid="" color="" display="1" changedat="3/7/2012
5:41:30 PM" pos="" facilityalias="" facilityaliasid="" />

    <record licensekey="991207" uid="94" facilitycode="STM"
code="STM" facilityname="ST. MARY'S HOSPITAL" facilitytype="0"
licensenum="" userfacilityid="" facilitynpi="4584552321"
facilityclia="" address1="" address2="11245 MADISON AVENUE"
zipcode="36111-3323" city="MONTGOMERY" state="AL"
countrycode="USA" areacode="334" contactname="" email=""
officephone="(334) 545-7778" includeinportal="0"
includeonclaims="1" facilitytypefid="" billclassfid=""
googleplaceid="" color="" display="1" changedat="3/7/2012
5:41:44 PM" pos="" facilityalias="" facilityaliasid="" />

    <record licensekey="991207" uid="234" facilitycode="TEST"
code="TEST" facilityname="TEST FACILITY" facilitytype="0"
licensenum="" userfacilityid="" facilitynpi=""
facilityclia="" address1="" address2="123 MAIN STREET"
zipcode="00213" city="PORTSMOUTH" state="NH" countrycode="USA"
areacode="603" contactname="" email="" officephone=""
includeinportal="0" includeonclaims="1" facilitytypefid=""
billclassfid="" googleplaceid="" color="" display="1"
changedat="8/1/2019 1:31:55 PM" pos="" facilityalias=""
facilityaliasid="" />

</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "-s": "PRDAPI1WFEVWPLE",
    "-lst": "5/13/2021 4:31:10 AM",
    "record": [
      {
        "-licensekey": "991207",
        "-uid": "1",
        "-facilitycode": "",
        "-code": "",
        "-facilityname": "",
        "-facilitytype": "0",

```

```

    "-licensenum": "",
    "-userfacilityid": "",
    "-facilitynpi": "",
    "-facilityclia": "",
    "-address1": "",
    "-address2": "",
    "-zipcode": "",
    "-city": "",
    "-state": "",
    "-countrycode": "",
    "-areacode": "",
    "-contactname": "",
    "-email": "",
    "-officephone": "",
    "-includeinportal": "1",
    "-includeonclaims": "1",
    "-facilitytypefid": "",
    "-billclassfid": "",
    "-googleplaceid": "",
    "-color": "",
    "-display": "0",
    "-changedat": "9/8/2004 12:41:32 PM",
    "-pos": "",
    "-facilityalias": "",
    "-facilityaliasid": "\" /",
    "-self-closing": "true"
  },
  {
    "-licensekey": "991207",
    "-uid": "2",
    "-facilitycode": "AOG",
    "-code": "AOG",
    "-facilityname": "ARCHES OBSTETRICS AND GYNECOLOGY",
    "-facilitytype": "0",

```

```

    "-licensenum": "",
    "-userfacilityid": "",
    "-facilitynpi": "",
    "-facilityclia": "",
    "-address1": "SUITE 110",
    "-address2": "2525 CHURCHILL DRIVE",
    "-zipcode": "36111",
    "-city": "MONTGOMERY",
    "-state": "AL",
    "-countrycode": "USA",
    "-areacode": "334",
    "-contactname": "",
    "-email": "",
    "-officephone": "(334) 984-9500",
    "-includeinportal": "0",
    "-includeonclaims": "1",
    "-facilitytypefid": "",
    "-billclassfid": "",
    "-googleplaceid": "",
    "-color": "",
    "-display": "0",
    "-changedat": "9/7/2007 12:09:56 PM",
    "-pos": "",
    "-facilityalias": "",
    "-facilityaliasid": "\" /",
    "-self-closing": "true"
  },
  {
    "-licensekey": "991207",
    "-uid": "4",
    "-facilitycode": "APED",
    "-code": "APED",
    "-facilityname": "ARCHES PEDIATRICS",
    "-facilitytype": "0",

```



```

    "-licensenum": "",
    "-userfacilityid": "",
    "-facilitynpi": "",
    "-facilityclia": "",
    "-address1": "SUITE 110",
    "-address2": "2525 CHURCHILL DRIVE",
    "-zipcode": "36111",
    "-city": "MONTGOMERY",
    "-state": "AL",
    "-countrycode": "USA",
    "-areacode": "334",
    "-contactname": "",
    "-email": "",
    "-officephone": "(334) 984-9500",
    "-includeinportal": "0",
    "-includeonclaims": "1",
    "-facilitytypefid": "",
    "-billclassfid": "",
    "-googleplaceid": "",
    "-color": "",
    "-display": "0",
    "-changedat": "9/7/2007 12:10:00 PM",
    "-pos": "",
    "-facilityalias": "",
    "-facilityaliasid": "\" /",
    "-self-closing": "true"
  },
  {
    "-licensekey": "991207",
    "-uid": "95",
    "-facilitycode": "AWC",
    "-code": "AWC",
    "-facilityname": "ALABAMA WOMEN'S CENTER",
    "-facilitytype": "2",

```

```

    "-licensenum": "",
    "-userfacilityid": "",
    "-facilitynpi": "8455122557",
    "-facilityclia": "",
    "-address1": "",
    "-address2": "5125 HIGHLAND DRIVE",
    "-zipcode": "36111-3323",
    "-city": "MONTGOMERY",
    "-state": "AL",
    "-countrycode": "USA",
    "-areacode": "334",
    "-contactname": "",
    "-email": "",
    "-officephone": "(334) 985-1212",
    "-includeinportal": "0",
    "-includeonclaims": "1",
    "-facilitytypefid": "",
    "-billclassfid": "",
    "-googleplaceid": "",
    "-color": "",
    "-display": "1",
    "-changedat": "3/7/2012 5:41:59 PM",
    "-pos": "",
    "-facilityalias": "",
    "-facilityaliasid": "\" /",
    "-self-closing": "true"
  },
  {
    "-licensekey": "991207",
    "-uid": "96",
    "-facilitycode": "LCS",
    "-code": "LCS",
    "-facilityname": "LABCORPS",
    "-facilitytype": "1",

```

```

    "-licensenum": "",
    "-userfacilityid": "",
    "-facilitynpi": "5412112158",
    "-facilityclia": "",
    "-address1": "",
    "-address2": "182 WRIGHT BROTHERS DRIVE",
    "-zipcode": "36111-3323",
    "-city": "MONTGOMERY",
    "-state": "AL",
    "-countrycode": "USA",
    "-areacode": "334",
    "-contactname": "",
    "-email": "",
    "-officephone": "(334) 551-2581",
    "-includeinportal": "0",
    "-includeonclaims": "1",
    "-facilitytypefid": "",
    "-billclassfid": "",
    "-googleplaceid": "",
    "-color": "",
    "-display": "1",
    "-changedat": "3/7/2012 5:41:52 PM",
    "-pos": "",
    "-facilityalias": "",
    "-facilityaliasid": "\" /",
    "-self-closing": "true"
  },
  {
    "-licensekey": "991207",
    "-uid": "3",
    "-facilitycode": "MSC",
    "-code": "MSC",
    "-facilityname": "MONTGOMERY SURGICAL CENTER",
    "-facilitytype": "2",

```

```

    "-licensenum": "",
    "-userfacilityid": "",
    "-facilitynpi": "4569873217",
    "-facilityclia": "",
    "-address1": "",
    "-address2": "9672 MAIN ST",
    "-zipcode": "36111-3323",
    "-city": "MONTGOMERY",
    "-state": "AL",
    "-countrycode": "USA",
    "-areacode": "334",
    "-contactname": "",
    "-email": "",
    "-officephone": "(334) 954-8778",
    "-includeinportal": "0",
    "-includeonclaims": "1",
    "-facilitytypefid": "",
    "-billclassfid": "",
    "-googleplaceid": "",
    "-color": "",
    "-display": "1",
    "-changedat": "3/7/2012 5:41:30 PM",
    "-pos": "",
    "-facilityalias": "",
    "-facilityaliasid": "\" /\"",
    "-self-closing": "true"
  },
  {
    "-licensekey": "991207",
    "-uid": "94",
    "-facilitycode": "STM",
    "-code": "STM",
    "-facilityname": "ST. MARY'S HOSPITAL",
    "-facilitytype": "0",

```

```

    "-licensenum": "",
    "-userfacilityid": "",
    "-facilitynpi": "4584552321",
    "-facilityclia": "",
    "-address1": "",
    "-address2": "11245 MADISON AVENUE",
    "-zipcode": "36111-3323",
    "-city": "MONTGOMERY",
    "-state": "AL",
    "-countrycode": "USA",
    "-areacode": "334",
    "-contactname": "",
    "-email": "",
    "-officephone": "(334) 545-7778",
    "-includeinportal": "0",
    "-includeonclaims": "1",
    "-facilitytypefid": "",
    "-billclassfid": "",
    "-googleplaceid": "",
    "-color": "",
    "-display": "1",
    "-changedat": "3/7/2012 5:41:44 PM",
    "-pos": "",
    "-facilityalias": "",
    "-facilityaliasid": "\" /",
    "-self-closing": "true"
  },
  {
    "-licensekey": "991207",
    "-uid": "234",
    "-facilitycode": "TEST",
    "-code": "TEST",
    "-facilityname": "TEST FACILITY",
    "-facilitytype": "0",

```

```

        "-licensenum": "",
        "-userfacilityid": "",
        "-facilitynpi": "",
        "-facilityclia": "",
        "-address1": "",
        "-address2": "123 MAIN STREET",
        "-zipcode": "00213",
        "-city": "PORTSMOUTH",
        "-state": "NH",
        "-countrycode": "USA",
        "-areacode": "603",
        "-contactname": "",
        "-email": "",
        "-officephone": "",
        "-includeinportal": "0",
        "-includeonclaims": "1",
        "-facilitytypefid": "",
        "-billclassfid": "",
        "-googleplaceid": "",
        "-color": "",
        "-display": "1",
        "-changedat": "8/1/2019 1:31:55 PM",
        "-pos": "",
        "-facilityalias": "",
        "-facilityaliasid": "\" /",
        "-self-closing": "true"
    }
]
}
}

```

Look Up Financial class

Action:lookupfinclass

Sample XML:

```
<ppmdmsg action="lookupfinclass" class="api"
msgtime="3/22/2021
10:11:06 AM" exactmatch="-1" name="m" page="1" />
```

Look Up Management Services Office Class

Action: lookupmsopatient

Login with the office key for which the management services are requested.

Sample XML:

```
<ppmdmsg action="lookupmsopatient" class="api" name="a"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "lookupmsopatient",
    "@class": "api",
    "@msgtime": "{{${timestamp}}}",
    "@exactmatch": "0",
    "@name": "a",
    "@orderby": "name",
    "@page": "1",
    "@excludestatus": "0",
    "@la": "lookupmsopatient",
    "@lac": "lookup",
    "@lat": "1513",
    "@let": "1626973328983",
    "@lst": "7/22/2021 10:02:09 AM"
  }
}
```


Attributes

- Required: action and class
- Sort/Filter: by "name"

Results

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFEJ24Y9" lst="8/13/2021 5:31:58 AM">
  <Results>
    <msopatientlist itemcount="3" page="1" pagecount="1"
itemsfrom="1" itemsto="3">
      <msopatient id="pat429653" name="A,A" chart="21"
ssn="XXX-XX-6945" hipaarelationship="18" dob="01/01/1980"
licensekey="770032">
        <address zipid="1" zip="10031" city="NEW YORK"
state="NY" address1="" address2="MAIN STREET"
countrycode="USA" areacode="212" />
        <contactinfo homephone="" />
      </msopatient>
      <msopatient id="pat429498" name="ADAM,KLUK1"
chart="4" ssn="XXX-XX-9086" hipaarelationship="18"
dob="02/18/1963" licensekey="770032">
        <address zipid="1" zip="00604"
city="AGUADILLA" state="PR" address1="" address2="FHDFHDH
232" countrycode="" areacode="" />
        <contactinfo homephone="" />
      </msopatient>
      <msopatient id="pat429524" name="ADAM,SUMMARY"
chart="19" ssn="XXX-XX-6082" hipaarelationship="IV"
dob="02/19/1980" licensekey="770032">
        <address zipid="1" zip="" city="" state=""
address1="" address2="GFHRGHG 232" countrycode="" areacode=""
/>
        <contactinfo homephone="" />
      </msopatient>
    </msopatientlist>
  </officelist />
</PPMDResults>
```

```
</Results>
<Error />
</PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },

  {
    "PPMDResults": {
      "@lst": "8/13/2021 5:41:02 AM",
      "@s": "PRDAPI1WFEAYQLM",
      "Error": null,
      "Results": {
        "msopatientlist": {
          "@itemcount": "3",
          "@itemsfrom": "1",
          "@itemsto": "3",
          "@page": "1",
          "@pagecount": "1",
          "msopatient": [
            {
              "@chart": "21",
              "@dob": "01/01/1980",
              "@hipaarelationship": "18",
              "@id": "pat429653",
              "@licensekey": "770032",
              "@name": "A,A",
```

```

"@ssn": "XXX-XX-6945",
"address": {
  "@address1": "",
  "@address2": "MAIN STREET",
  "@areacode": "212",
  "@city": "NEW YORK",
  "@countrycode": "USA",
  "@state": "NY",
  "@zip": "10031",
  "@zipid": "1"
},
"contactinfo": {
  "@homephone": ""
}
},
{
  "@chart": "4",
  "@dob": "02/18/1963",
  "@hipaarelationship": "18",
  "@id": "pat429498",
  "@licensekey": "770032",
  "@name": "ADAM,KLUK1",
  "@ssn": "XXX-XX-9086",
  "address": {
    "@address1": "",
    "@address2": "FHDFHDHDH 232",
    "@areacode": "",
    "@city": "AGUADILLA",
    "@countrycode": "",
    "@state": "PR",
    "@zip": "00604",
    "@zipid": "1"
  },
  "contactinfo": {

```

```

        "@homephone": ""
    },
    {
        "@chart": "19",
        "@dob": "02/19/1980",
        "@hipaarelationship": "IV",
        "@id": "pat429524",
        "@licensekey": "770032",
        "@name": "ADAM,SUMMARY",
        "@ssn": "XXX-XX-6082",
        "address": {
            "@address1": "",
            "@address2": "GFHRGHG 232",
            "@areacode": "",
            "@city": "",
            "@countrycode": "",
            "@state": "",
            "@zip": "",
            "@zipid": "1"
        },
        "contactinfo": {
            "@homephone": ""
        }
    }
]
},
"officelist": null
}
}
}

```

Look Up Referral Source

Action:lookupmarsource

Sample XML:

```
<?xml version="1.0" encoding="UTF-8" ?>
<ppmdmsg action="lookupmarsource" class="api"
msgtime="4/6/2021
9:32:22 AM" exactmatch="0" name=""
orderby="name" page=""/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "lookupmarsource",
    "@class": "api",
    "@msgtime": "4/6/2021 9:32:22 AM",
    "@exactmatch": "0",
    "@name": "",
    "@orderby": "name",
    "@page": "",
  }
}
```

Attributes:

- **Required:** *action* and *class*

Result:

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFECSSFR">
```

```

<Results>
  <marsourcelist>
    <marsource id="source10" name="CLINIC SIGN" />
    <marsource id="source2" name="DOCTOR RECOMMENDED"
/>
    <marsource id="source11" name="EMPLOYER
RECOMMENDED" />
    <marsource id="source20" name="FACEBOOK AD" />
    <marsource id="source14" name="FAMILY OR FRIEND"
/>
    <marsource id="source1" name="FORMER PATIENT" />
    <marsource id="source8" name="INSURANCE COMPANY"
/>
    <marsource id="source17" name="NEWSPAPER" />
    <marsource id="source16" name="OTHER" />
    <marsource id="source12" name="RADIO
ADVERTISEMENT" />
    <marsource id="source9" name="TV ADVERTISEMENT" />
    <marsource id="source15" name="WEB PAGE" />
    <marsource id="source13" name="YELLOW PAGES" />
  </marsourcelist>
</Results>
<Error />
</PPMDResults>

```

Sample JSON:

```

{
  "@s": "PRDAPI1WFECSSFR",
  "Results": {
    "marsourcelist": [
      {
        "@id": "source10",
        "@name": "CLINIC SIGN"
      },

```

```

{
  "@id": "source2",
  "@name": "DOCTOR RECOMMENDED"
},
{
  "@id": "source11",
  "@name": "EMPLOYER RECOMMENDED"
},
{
  "@id": "source20",
  "@name": "FACEBOOK AD"
},
{
  "@id": "source14",
  "@name": "FAMILY OR FRIEND"
},
{
  "@id": "source1",
  "@name": "FORMER PATIENT"
},
{
  "@id": "source8",
  "@name": "INSURANCE COMPANY"
},
{
  "@id": "source17",
  "@name": "NEWSPAPER"
},
{
  "@id": "source16",
  "@name": "OTHER"
},
{
  "@id": "source12",

```

```
        "@name": "RADIO ADVERTISEMENT"
    },
    {
        "@id": "source9",
        "@name": "TV ADVERTISEMENT"
    },
    {
        "@id": "source15",
        "@name": "WEB PAGE"
    },
    {
        "@id": "source13",
        "@name": "YELLOW PAGES"
    }
]
},
"Error": []
}
```

Look Up Referral Status

Action:lookupmarstatus

Sample XML:

```
<?xml version="1.0" encoding="UTF-8" ?>
<ppmdmsg action="lookupmarstatus" class="api"
msgtime="4/6/2021
9:32:22 AM" exactmatch="0" name=""
orderby="name" page=""/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "lookupmarstatus",
    "@action": "api",
    "@msgtime": "4/6/2021 9:32:22 AM",
    "@exactmatch": "0",
    "@name": "",
    "@orderby": "name",
    "@page": "",
  }
}
```

Attributes:

- **Required:** *action* and *class*

Result:

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
```

```

<PPMDResults s="PRDAPI1WFEJ24Y9">
  <Results>
    <marstatuslist>
      <marstatus id="stat21" name="1-SCHEDULED CONSULT"
/>
      <marstatus id="stat22" name="2-FREE EXAM NO SHOW"
/>
      <marstatus id="stat23" name="3-PROCEDURE DECLINED"
/>
      <marstatus id="stat24" name="4-SCHEDULED PROCEDUR"
/>
    </marstatuslist>
  </Results>
  <Error />
</PPMDResults>

```

Sample JSON:

```

{
  "@s": "PRDAPI1WFEJ24Y9",
  "Results": {
    "marstatuslist": [
      {
        "@id": "stat21",
        "@name": "1-SCHEDULED CONSULT"
      },
      {
        "@id": "stat22",
        "@name": "2-FREE EXAM NO SHOW"
      },
      {
        "@id": "stat23",
        "@name": "3-PROCEDURE DECLINED"
      },
    ]
  }
}

```

```
    {
      "@id": "stat24",
      "@name": "4-SCHEDULED PROCEDUR"
    }
  ]
},
"Error": []
}
```

Look Up Mod Code

Action:lookupmodcode

Sample XML:

```
<ppmdmsg action="lookupmodcode" class="api" msgtime="3/22/2021  
10:11:06 AM" exactmatch="-1" code="" page="1" />
```

Look Up Proc Code

Action: lookupproccode

Note

When using the "lookupproccode" action, be aware that you should consider using a sub-element to filter the results to procedure codes or macro codes. The element to include is <subtype name="TYPE_NAME"/> where TYPE_NAME may be "macro" or "proccode".

Sample XML:

```
<ppmdmsg action="lookupproccode" class="api"
msgtime="3/22/2021
10:11:06 AM" exactmatch="-1" code="99212" page="1" />
```

Look Up Profile

Action: lookupprofile

Sample XML:

```
<ppmdmsg action="lookupprofile" class="api" msgtime="3/22/2021  
10:11:06 AM" exactmatch="-1" name="" page="1" />
```

Sample JSON:

```
{  
  "ppmdmsg": {  
    "_action": "lookupprofile",  
    "_class": "api",  
    "_msgtime": "3/22/2021 10:11:06 AM",  
    "_exactmatch": "-1",  
    "_name": "",  
    "_page": "1"  
  }  
}
```

Look Up Provider

Action: lookupprovider

Sample XML:

```
<?xml version="1.0" encoding="UTF-8" ?>
<ppmdmsg action = "lookupprovider" class = "api" msgtime
= "4/1/2021 2:16:55 PM" exactmatch = "1" name = "" page = "-1"
nocookie = "0"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "lookupprovider",
    "@class": "api",
    "@msgtime": "4/1/2021 2:16:55 PM",
    "@exactmatch": "-1",
    "@name": "",
    "@page": "1",
    "@nocookie": "0"
  }
}
```

Attributes:

- **Required:** *action* and *class*

Result:

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
```

<PPMDResults s="PRDAPI1WFEJ24Y9" lst="5/14/2021 6:40:33 AM">

<Results>

<providerlist>

<provider id="mprov14" code="ADAMS"
name="ADAMS,CASEY" />

<provider id="mprov15" code="BABBIT"
name="BABBIT,CASEY" />

<provider id="mprov16" code="CLARK"
name="CLARK,CASEY" />

<provider id="mprov17" code="DAVID"
name="DAVIDSON,CASEY" />

<provider id="mprov77" code="ALBUS"
name="DUMBLEDORE,ALBUS" />

<provider id="mprov18" code="EGAN"
name="EGAN,CASEY" />

<provider id="mprov19" code="FISCHE"
name="FISCHER,CASEY" />

<provider id="mprov20" code="GRAHAM"
name="GRAHAM,CASEY" />

<provider id="mprov21" code="HOWARD"
name="HOWARD,CASEY" />

<provider id="mprov22" code="IVERSO"
name="IVERSON,CASEY" />

<provider id="mprov3" code="JONES"
name="JONES,CAMERON" />

<provider id="mprov23" code="KIRK"
name="KIRK,CASEY" />

<provider id="mprov73" code="LM/RD"
name="LEVI,RYAN" />

<provider id="mprov24" code="LYONS"
name="LYONS,CASEY" />

<provider id="mprov25" code="MICHAEL"
name="MICHAELS,CASEY" />

<provider id="mprov8" code="MILLER"
name="MILLER,ALEX" />

<provider id="mprov10" code="NICHOLSON"
name="NICHOLS,SAM" />

<provider id="mprov9" code="OSHEA"
name="OSHEA,JAMIE" />

<provider id="mprov5" code="RICHEY"
name="RICHEY,DREW" />


```

        <provider id="mprov4" code="SMITH"
name="SMITH,TRACY" />
        <provider id="mprov71" code="TEST"
name="TESTER,PROVIDER" />
        <provider id="mprov11" code="THATJ"
name="THATCHER,JORDAN" />
        <provider id="mprov12" code="THOMJ"
name="THOMPSON,JESSIE" />
        <provider id="mprov13" code="VANCR"
name="VANCE,RORY" />
    </providerlist>
</Results>
<Error />
</PPMDResults>

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFE5AP9B",
    "@lst": "5/14/2021 6:41:52 AM",
    "Results": {
      "providerlist": {
        "provider": [
          {
            "@id": "mprov14",
            "@code": "ADAMS",
            "@name": "ADAMS,CASEY"
          },
          {
            "@id": "mprov15",

```

```

        "@code": "BABBIT",
        "@name": "BABBIT,CASEY"
    },
    {
        "@id": "mprov16",
        "@code": "CLARK",
        "@name": "CLARK,CASEY"
    },
    {
        "@id": "mprov17",
        "@code": "DAVID",
        "@name": "DAVIDSON,CASEY"
    },
    {
        "@id": "mprov77",
        "@code": "ALBUS",
        "@name": "DUMBLEDORE,ALBUS"
    },
    {
        "@id": "mprov18",
        "@code": "EGAN",
        "@name": "EGAN,CASEY"
    },
    {
        "@id": "mprov19",
        "@code": "FISCHE",
        "@name": "FISCHER,CASEY"
    },
    {
        "@id": "mprov20",
        "@code": "GRAHAM",
        "@name": "GRAHAM,CASEY"
    },
    {

```

```

        "@id": "mprov21",
        "@code": "HOWARD",
        "@name": "HOWARD,CASEY"
    },
    {
        "@id": "mprov22",
        "@code": "IVERSO",
        "@name": "IVERSON,CASEY"
    },
    {
        "@id": "mprov3",
        "@code": "JONES",
        "@name": "JONES,CAMERON"
    },
    {
        "@id": "mprov23",
        "@code": "KIRK",
        "@name": "KIRK,CASEY"
    },
    {
        "@id": "mprov73",
        "@code": "LM/RD",
        "@name": "LEVI,RYAN"
    },
    {
        "@id": "mprov24",
        "@code": "LYONS",
        "@name": "LYONS,CASEY"
    },
    {
        "@id": "mprov25",
        "@code": "MICHAEL",
        "@name": "MICHAELS,CASEY"
    },
    },

```

```

{
  "@id": "mprov8",
  "@code": "MILLER",
  "@name": "MILLER,ALEX"
},
{
  "@id": "mprov10",
  "@code": "NICHS",
  "@name": "NICHOLS,SAM"
},
{
  "@id": "mprov9",
  "@code": "OSHEA",
  "@name": "OSHEA,JAMIE"
},
{
  "@id": "mprov5",
  "@code": "RICHEY",
  "@name": "RICHEY,DREW"
},
{
  "@id": "mprov4",
  "@code": "SMITH",
  "@name": "SMITH,TRACY"
},
{
  "@id": "mprov71",
  "@code": "TEST",
  "@name": "TESTER,PROVIDER"
},
{
  "@id": "mprov11",
  "@code": "THATJ",
  "@name": "THATCHER,JORDAN"
}

```

```
    },
    {
      "@id": "mprov12",
      "@code": "THOMJ",
      "@name": "THOMPSON,JESSIE"
    },
    {
      "@id": "mprov13",
      "@code": "VANCRC",
      "@name": "VANCE,RORY"
    }
  ]
},
"Error": null
}
```

Look Up Patient

Action: lookuppatient

Sample XML:

```
<?xml version="1.0" encoding="UTF-8" ?>
<ppmdmsg action = "lookuppatient" class = "api" msgtime =
"4/1/2021 2:16:55 PM" exactmatch = "-1" name = " A,Brian" page
= "1" nocookie = "0"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "lookuppatient",
    "@class": "api",
    "@msgtime": "4/1/2021 2:16:55 PM",
    "@exactmatch": "-1",
    "@name": "A,Brian",
    "@page": "1",
    "@nocookie": "0"
  }
}
```

Attributes

- Required: action and class
- name – the structure for this value following: "surname, name"

Results

Sample XML:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFEWK8T" lst="6/9/2021 9:03:42 AM">
  <Results>
    <patientlist itemcount="1" page="1" pagecount="1"
itemsfrom="1" itemsto="1">
      <patient id="pat148" name="ABBOTT,BRIAN"
chart="1501" ssn="111-11-1111" hipaarelationship="18"
dob="06/04/1971">
        <address zipid="1" zip="36116"
city="MONTGOMERY" state="AL" address1="123 MAIN STREET"
address2="9963 APPLE LANE" countrycode="" areacode="334" />
        <contactinfo homephone="(334) 555-2134" />
      </patient>
    </patientlist>
  </Results>
  <Error />
</PPMDResults>

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFEVWPLE",
    "@lst": "6/9/2021 9:04:53 AM",
    "Results": {
      "patientlist": {
        "@itemcount": "1",
        "@page": "1",
        "@pagecount": "1",
        "@itemsfrom": "1",

```

```

"@itemsto": "1",
"patient": {
  "@id": "pat148",
  "@name": "ABBOTT,BRIAN",
  "@chart": "1501",
  "@ssn": "111-11-1111",
  "@hipaarelationship": "18",
  "@dob": "06/04/1971",
  "address": {
    "@zipid": "1",
    "@zip": "36116",
    "@city": "MONTGOMERY",
    "@state": "AL",
    "@address1": "123 MAIN STREET",
    "@address2": "9963 APPLE LANE",
    "@countrycode": "",
    "@areacode": "334"
  },
  "contactinfo": {
    "@homephone": "(334) 555-2134"
  }
},
"Error": null
}

```

Look Up Referring Provider

Action: lookuprefprovider

Sample XML:

```
<ppmdmsg action = "lookuprefprovider" class = "api" msgtime =  
"4/1/2021 2:16:55 PM" exactmatch = "0" code = "" name = ""  
specialty = "" address = "" npi = "123" />
```

Sample JSON:

```
{  
  "ppmdmsg": {  
    "@action": "lookuprefprovider",  
    "@class": "api",  
    "@msgtime": "4/1/2021 3:43:17 PM",  
    "@exactmatch": "0",  
    "@code": "",  
    "@name": "",  
    "@specialty": "",  
    "@address": "",  
    "@npi": "123"  
  }  
}
```

Attributes:

- **Required:** *action* and *class*
- **Sort:** *by name*

Result:

Sample XML Response:

```

<PPMDResults s="PRDAPI1WFEJ24Y9" lst="5/14/2021 6:40:33 AM">
  <Results>
    <refproviderlist>
      <refprovider id="rprov504" code="ADAMS"
name="ADAMS,CASEY" specialty="" address="" npi="123456789"/>
      <refprovider id="rprov6232" code="A"
name="ANDREJUK,JULIA" specialty="" address="4132 NORTH COLLEGE
AVENUE" npi="123" />
    </refproviderlist>
  </Results>
  <Error />
</PPMDResults>

```

Sample JSON Response:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "advancedmd-api-processrequest-0-85ddb45dbc-
zxgk8",
    "@lst": "04/04/2025 06:24:30",
    "Results": {
      "refproviderlist": {
        "refprovider": {
          "@id": "rprov504",
          "@code": "ADAMS",
          "@name": "ADAMS,CASEY",
          "@specialty": "",
          "@address": "",
          "@npi": "123456789"

```

```
    },  
    "refprovider": {  
      "@id": "rprov6232",  
      "@code": "A",  
      "@name": "ANDREJUK,JULIA",  
      "@specialty": "",  
      "@address": "4132 NORTH COLLEGE AVENUE",  
      "@npi": "123"  
    }  
  }  
}  
}
```

Look Up Responsible Party

Action: lookuprespparty

Sample XML:

```
<ppmdmsg action="lookuprespparty" class="api"
msgtime="3/22/2021
10:11:06 AM" exactmatch="-1" name="a,a" page="1" />
```

Lookup Patient Portal Account

Action: lookuppatientportalaccount

Sample XML:

```
<ppmdmsg action="lookuppatientportalaccount"
  class="api"
  msgtime="5/18/2021 5:29:44 AM"
  exactmatch="0"
  fullname="Ambrose"
  orderby="fullname"
  page="1" />
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "lookuppatientportalaccount",
    "@class": "api",
    "@msgtime": "4/6/2021 9:32:22 AM",
    "@exactmatch": "0",
    "@fullname": "ambrose"
  }
}
```

Attributes

- Required: action and class
- Sorted: by "fullname" and "emailaddress" fields

Additional Explanation: In case the incorrect Full Name or Email Address are inserted in request body and no matches found on backend, an empty response returns. Be sure that "fullname" and "emailaddress" attributes are correct (if you need them).

Results

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="PRDAPI1WFEGWK8T" lst="5/21/2021 2:47:59 AM">
  <Results>
    <patientportalaccountlist>
      <patientportalaccount id="6414"
emailaddress="jsmith@email.com" fullname="JOHN,SMITH" />
    </patientportalaccountlist>
  </Results>
</PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "@s": "PRDAPI1WFEGWK8T",
    "@lst": "5/21/2021 2:49:11 AM",
    "Results": {
      "patientportalaccountlist": {
        "patientportalaccount": {
          "@id": "6414",
          "@emailaddress": "jsmith@email.com",
          "@fullname": "JOHN,SMITH"
        }
      }
    }
  }
}
```

}
}
}
}
}

Get Additional Demographics

Use this call to retrieve the list of gender identity and sexual orientation available.

Method: POST

Endpoint: {{Redirect_URL_XLMRPC}}

Example JSON:

```
{
  "ppmdmsg": {
    "@action": "getadditionaldemographics",
    "@class": "demographics",
    "@msgtime": "12/19/2024 1:10:10 PM"
  }
}
```

Example Response:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-4-5b88bf9847-
j9zm5" lst="12/19/2024 12:12:02">
  <Results>
    <genderidentitylist>
      <genderidentity uid="558" description="Male" />
      <genderidentity uid="559" description="Female" />
      <genderidentity uid="560" description="Transgender
Male / Trans Man / Female-to-Male" />
      <genderidentity uid="561" description="Transgender
Female / Trans Woman / Male-to-Female" />
      <genderidentity uid="562"
description="Genderqueer, neither exclusively male nor female"
/>
```

```

        <genderidentity uid="563" description="Additional
gender category / Other" />
        <genderidentity uid="564" description="Decline to
answer" />
    </genderidentitylist>
    <sexualorientationlist>
        <sexualorientation uid="565" description="Straight
/ Heterosexual" />
        <sexualorientation uid="566" description="Lesbian
/ Gay / Homosexual" />
        <sexualorientation uid="567"
description="Bisexual" />
        <sexualorientation uid="568"
description="Something else" />
        <sexualorientation uid="569" description="Don't
know" />
        <sexualorientation uid="570" description="Decline
to answer" />
    </sexualorientationlist>
</Results>
</PPMDResults>

```

Look Up Account Type

Method: POST

This call is used to search for all the account types available on the system.

Endpoint: {{Redirect_URL_XLMRPC}}

Payload:

```
{
  "ppmdmsg": {
    "@action": "lookupaccttype",
    "@class": "api",
    "@msgtime": "4/1/2021 2:16:55 PM",
    "@exactmatch": "0",
    "@name": "s",
    "@page": "1",
    "@nocookie": "0"
  }
}
```

Sample Result:

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-4-774684d6b-
bskv7" lst="04/10/2025 11:14:11">
  <Results>
    <accttypelist>
      <accttype id="accttype6" code="SP" name="SELF PAY"
sendstmt="1" balancefwd="0" stmtrestart="" stmtformat=""
billcycle="25" fincharge="0" />
    </accttypelist>
  </Results>
</PPMDResults>
```

```
<Error />  
</PPMDResults>
```

System Settings (Master File) Actions

Add Notes Type

Action:savenotetypes

Sample XML:

```
<ppmdmsg action="savenotetypes" class="api" msgtime="3/29/2004
5:55:50 PM">
  <masterfile uid="" title="31" description="Lab results"/>
</ppmdmsg>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "savenotetypes",
    "@class": "api",
    "@msgtime": "3/29/2004 5:55:50 PM",
    "masterfile": {
      "@uid": "",
      "@title": "31",
      "@description": "Lab results"
    }
  }
}
```

Results:

This action returns an attribute newid in <PPMDResults> element that is the id of the newly added note type.

Sample XML:

```
<PPMDResults newid="41">
  <record licensekey="840006" uid="1" title="" description=""
```

```

display="0" creationdate="" createuser="" changedat="4/17/2015
4:23:01 PM" />

<record licensekey="840006" uid="41" title="31"
description="LAB RESULTS" display="1" creationdate="10/24/2015
2:54:17 PM" createuser="PPMD_TROY" changedat="10/24/2015
2:54:17 PM" />

<record licensekey="840006" uid="11" title="BN"
description="BILLING NOTES" display="1"
creationdate="9/12/2000 2:54:17 PM" createuser="PPMD_TROY"
changedat="4/17/2015 4:23:01 PM" />

<record licensekey="840006" uid="7" title="CO"
description="COLLECTION NOTES" display="1"
creationdate="9/11/2000 2:54:17 PM" createuser="PPMD_TROY"
changedat="4/17/2015 4:23:01 PM" />

<record licensekey="840006" uid="9" title="DN"
description="DOCTOR NOTES" display="1" creationdate="9/11/2000
2:54:17 PM" createuser="PPMD_TROY" changedat="4/17/2015
4:23:01 PM" />

<record licensekey="840006" uid="12" title="PC"
description="PATIENT CONSENT NOTES" display="1"
creationdate="9/11/2000 2:54:17 PM" createuser="PPMD_TROY"
changedat="4/17/2015 4:23:01 PM" />

<record licensekey="840006" uid="10" title="RN"
description="REFERRAL NOTES" display="1"
creationdate="9/12/2000 2:54:17 PM" createuser="PPMD_TROY"
changedat="4/17/2015 4:23:01 PM" />

</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "@newid": "41",
    "record": [
      {
        "@licensekey": "840006",
        "@uid": "1",
        "@title": "",
        "@description": "",
        "@display": "0",

```

```

    "@creationdate": "",
    "@createuser": "",
    "@changedat": "4/17/2015 4:23:01 PM"
  },
  {
    "@licensekey": "840006",
    "@uid": "41",
    "@title": "31",
    "@description": "LAB RESULTS",
    "@display": "1",
    "@creationdate": "10/24/2015 2:54:17 PM",
    "@createuser": "PPMD_TROY",
    "@changedat": "10/24/2015 2:54:17 PM"
  },
  {
    "@licensekey": "840006",
    "@uid": "11",
    "@title": "BN",
    "@description": "BILLING NOTES",
    "@display": "1",
    "@creationdate": "9/12/2000 2:54:17 PM",
    "@createuser": "PPMD_TROY",
    "@changedat": "4/17/2015 4:23:01 PM"
  },
  {
    "@licensekey": "840006",
    "@uid": "7",
    "@title": "CO",
    "@description": "COLLECTION NOTES",
    "@display": "1",
    "@creationdate": "9/11/2000 2:54:17 PM",
    "@createuser": "PPMD_TROY",
    "@changedat": "4/17/2015 4:23:01 PM"
  },

```

```

{
  "@licensekey": "840006",
  "@uid": "9",
  "@title": "DN",
  "@description": "DOCTOR NOTES",
  "@display": "1",
  "@creationdate": "9/11/2000 2:54:17 PM",
  "@createuser": "PPMD_TROY",
  "@changedat": "4/17/2015 4:23:01 PM"
},
{
  "@licensekey": "840006",
  "@uid": "12",
  "@title": "PC",
  "@description": "PATIENT CONSENT NOTES",
  "@display": "1",
  "@creationdate": "9/11/2000 2:54:17 PM",
  "@createuser": "PPMD_TROY",
  "@changedat": "4/17/2015 4:23:01 PM"
},
{
  "@licensekey": "840006",
  "@uid": "10",
  "@title": "RN",
  "@description": "REFERRAL NOTES",
  "@display": "1",
  "@creationdate": "9/12/2000 2:54:17 PM",
  "@createuser": "PPMD_TROY",
  "@changedat": "4/17/2015 4:23:01 PM"
}
]
}
}

```


Notes:

- *uid: This attribute is required and is required to be empty.*
- *title: code for the note type. Title needs to be unique for each note type and is two characters long.*
- *description: Description for the note type.*

Select Diagnosis Codes

Action:selectdiagnosiscodes

Sample document:

(a) The following call will give first 50 diagnosis codes starting from the lowest diagnosis code number:

Sample XML:

```
<ppmdmsg action="selectdiagnosiscodes" class="masterfiles"
msgtime="12/16/2005 4:35:02 PM" type="0" id=""/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "selectdiagnosiscodes",
    "@class": "masterfiles",
    "@msgtime": "12/16/2005 4:35:02 PM",
    "@type": "0",
    "@id": ""
  }
}
```

(b) The following call will give first 50 diagnosis codes starting from the diagnosis code with the diagnosis code id specified in the "id" attribute:

Sample XML:

```
<ppmdmsg action="selectdiagnosiscodes" class="masterfiles"
msgtime="12/16/2005 4:35:02 PM" type="0" id="89024"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "selectdiagnosiscodes",
    "@class": "masterfiles",
    "@msgtime": "12/16/2005 4:35:02 PM",
    "@type": "0",
    "@id": "89024"
  }
}
```

(c) The following call will give you one record with the diagnosis code id specified in the "id" attribute:

Sample XML:

```
<ppmdmsg action="selectdiagnosiscodes" class="masterfiles"
msgtime="12/16/2005 4:35:02 PM" type="1" id="89024"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "selectdiagnosiscodes",
    "@class": "masterfiles",
    "@msgtime": "12/16/2005 4:35:02 PM",
    "@type": "1",
    "@id": "89024"
  }
}
```

Results:

Request (a) will give the following results (request (b) gives the same results if ID attribute is set to 229168. This number is the ID of the first record in the results shown below):

Sample XML:

```
<?xml version='1.0' encoding='ISO-8859-1' ?>< PPMDResults>
<record licensekey="850006" uid="229168" diagnosiscode="00.12"
insurancedescription="TESTING 18"statementdescription="TESTING
19"
diagnosisxref1="00.12" diagnosisxref2="00.12"
diagnosisxref3="00.12"
display="0" changedat="10/31/2005 11:59:23 AM" /> <record
licensekey="850006"
uid="229167" diagnosiscode="00.13"
insurancedescription="TESTING 13A"
statementdescription="TESTING 13A" diagnosisxref1="00.13A"
diagnosisxref2="00.13A" diagnosisxref3="00.13A"display="0"
changedat="10/31/2005 11:59:23 AM" /> <record
licensekey="850006"
uid="229164" diagnosiscode="00.14"
insurancedescription="TESTING 12"
statementdescription="TESTING 12" diagnosisxref1="00.14"
diagnosisxref2="00.14" diagnosisxref3="00.14"display="0"
changedat="10/31/2005 11:59:23 AM" />
[deleted 47 records as they take too much space]<
/PPMDResults>
```

Sample JSON:

```
{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },

```

```

"PPMDResults": {
  "record": [
    {
      "@licensekey": "850006",
      "@uid": "229168",
      "@diagnosiscode": "00.12",
      "@insurancedescription": "TESTING 18",
      "@statementdescription": "TESTING 19",
      "@diagnosisxref1": "00.12",
      "@diagnosisxref2": "00.12",
      "@diagnosisxref3": "00.12",
      "@display": "0",
      "@changedat": "10/31/2005 11:59:23 AM"
    },
    {
      "@licensekey": "850006",
      "@uid": "229167",
      "@diagnosiscode": "00.13",
      "@insurancedescription": "TESTING 13A",
      "@statementdescription": "TESTING 13A",
      "@diagnosisxref1": "00.13A",
      "@diagnosisxref2": "00.13A",
      "@diagnosisxref3": "00.13A",
      "@display": "0",
      "@changedat": "10/31/2005 11:59:23 AM"
    },
    {
      "@licensekey": "850006",
      "@uid": "229164",
      "@diagnosiscode": "00.14",
      "@insurancedescription": "TESTING 12",
      "@statementdescription": "TESTING 12",
      "@diagnosisxref1": "00.14",
      "@diagnosisxref2": "00.14",

```

```

        "@diagnosisxref3": "00.14",
        "@display": "0",
        "@changedat": "10/31/2005 11:59:23 AM"
    }
],
"#text": "\r\n [deleted 47 records as they take too much
space]\r\n"
}
}

```

Request (c) will return just one record belonging to the diagnosis code with the "id" attribute.

Sample XML:

```

<?xml version='1.0' encoding='ISO-8859-1'?>
  <PPMDResults>
    <record licensekey="850006" uid="229168"
diagnosiscode="00.12" display="0" changedat="10/31/2005
11:59:23 AM"/>
  </PPMDResults>

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0",
    "@encoding": "ISO-8859-1"
  },
  "PPMDResults": {
    "record": {
      "@licensekey": "850006",

```

```
"@uid": "229168",  
"@diagnosiscode": "00.12",  
"@display": "0",  
"@changedat": "10/31/2005 11:59:23 AM"  
}  
}  
}
```

Select User File Templates

Action:selectuserfiletemplates

Sample XML:

```
<ppmdmsg action="selectuserfiletemplates" class="masterfiles"
msgtime="12/16/2005 5:15:41 PM" templatetype="pt"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "selectuserfiletemplates",
    "@class": "masterfiles",
    "@msgtime": "12/16/2005 5:15:41 PM",
    "@templatetype": "pt"
  }
}
```

Results:

The results return the <record> element that translates into the tab on the Custom Tabs screen in the Patient Demographics. Each <record> has a number of fields associated with it. The <validationlist> is predefined. For example for a "text" field, one can select "Height (English)" as a format when defining a field. This format has a predefined validation as shown in the example below:

Sample XML:

```
<?xml version="1.0" ?>
< PPMDResults>
  <Results>
    <record ordinal="3" uid="64" code="PG" name="Pregnancy"
templatetype="pt"
```



```

    issingleuse="0"hasmultiple="0" includeinmailmerge="0"
includeonfacesheet="0"

    includeindemographics="1"sortby1id="" sortby1desc="1"
sortby2id=""

    sortby2desc="0" changedat="2005-11-16
15:38:19"changedby="PPMD_HROSEB"

    createdat="2005-09-27 12:03:43" createdby="PPMD_HROSEB"
display="1"

    fieldlist="Date">
    <fieldlist>

    <field id="266" ordinal="266" name="Date" alias="pg_date"
datatype="Date"

    subtype="" isrequired="1"defaultvalue=""
defaultvaluename=""

    defaultvaluecode="" validationregexp=""
includeinlist="1"display="1"

    normalrangelow="" normalrangehigh="" />
    </fieldlist>
</record>
[deleted records] <validationlist>
    <validation id="45" name="Height (English)"
    regex="^(([0-9]'(\ ?([0-9]|1[01]))(\.[0-9])?&quot;)?)|([0-
9]{1,2}(\.[0-9])?&quot;))$
    "errmsg="Please enter a valid height in feet and/or
inches (e.g. 6', 5' 10.5&quot;, 32&quot;)." />
[deleted] </validationlist>
</Results>
< /PPMDResults>

```

Sample JSON:

```

{
  "?xml": {
    "@version": "1.0"
  },
  "PPMDResults": {

```

```

"Results": {
  "record": {
    "@ordinal": "3",
    "@uid": "64",
    "@code": "PG",
    "@name": "Pregnancy",
    "@templatetype": "pt",
    "@issingleuse": "0",
    "@hasmultiple": "0",
    "@includeinmailmerge": "0",
    "@includeonfacesheet": "0",
    "@includeindemographics": "1",
    "@sortby1id": "",
    "@sortby1desc": "1",
    "@sortby2id": "",
    "@sortby2desc": "0",
    "@changedat": "2005-11-16 15:38:19",
    "@changedby": "PPMD_HROSEB",
    "@createdat": "2005-09-27 12:03:43",
    "@createdby": "PPMD_HROSEB",
    "@display": "1",
    "@fieldlist": "Date",
    "fieldlist": {
      "field": {
        "@id": "266",
        "@ordinal": "266",
        "@name": "Date",
        "@alias": "pg_date",
        "@datatype": "Date",
        "@subtype": "",
        "@isrequired": "1",
        "@defaultvalue": "",
        "@defaultvaluenam": "",
        "@defaultvaluecode": "",

```

```

        "@validationregexp": "",
        "@includeinlist": "1",
        "@display": "1",
        "@normalrangelow": "",
        "@normalrangehigh": ""
    }
}
},
"#text": "\r\n[deleted records]\r\n ",
"validationlist": {
    "validation": {
        "@id": "45",
        "@name": "Height (English)",
        "@regex": "^\(([0-9]'(\ \ ?([0-9]|1[01])(\ \ .[0-9]))?\ \ )?)|([0-9]{1,2}(\ \ .[0-9])?\ \ )\)$",
        "@errmsg": "Please enter a valid height in feet and/or inches (e.g. 6', 5' 10.5\", 32\")."
    },
    "#text": "\r\n[deleted]\r\n "
}
}
}
}
}
}

```

Select Custom Claim Fields

Action: selectcustomclaimfields

Class: masterfiles

Retrieves a claim field or a list of claim fields based on the passed-in request.

Sample JSON Request:

```
{
  "ppmdmsg": {
    "@action": "selectcustomclaimfield",
    "@class": "masterfiles",
    "@msgtime": "4/1/2004 3:43:17 PM"
    "@id": "0"
  }
}
```

Sample XML Request:

```
<ppmdmsg action='selectcustomclaimfield' class='masterfiles'
id='0' msgtime='8/18/2014 11:50:01 AM'/>
```

Response

The action's response contains custom claim field(s) information, along with field types metadata (if available). Most of the metadata is used by the legacy PM logic.

Sample JSON Response:

```
{
```

```

"PPMDResults": {
  "@s": "advancedmd-api-processrequest-0-56745fc888-5kpxq",
  "@lst": "04/18/2025 01:00:55",
  "Results": {
    "record": {
      "@uid": "1",
      "@fieldname": "Field Name",
      "@fielddescription": "Short Description",
      "@datatypeid": "3",
      "@subtypeid": "",
      "@selectlistid": "",
      "@isrequired": "0",
      "@includeintooltip": "0",
      "@includeinepisode": "0",
      "@displaylevelid": "2",
      "@defaulttextvalue": "",
      "@defaultfidvalue": "",
      "@ordinal": "1",
      "@changedat": "2012-04-26 07:36:27",
      "@changedby": "",
      "@createdat": "2012-01-24 21:17:00",
      "@createdby": "SYSTEM_5021",
      "@inuse": "0",
      "@isactive": "0",
      "@ishipaa": "1"
    },
    "displaylevellist": {
      "displaylevel": [
        {
          "@id": "1",
          "@name": "Charge"
        },
        {
          "@id": "2",

```

```

        "@name": "Visit"
    },
    {
        "@id": "3",
        "@name": "Carrier"
    }
]
},
"datatypelist": {
    "datatype": [
        {
            "@id": "3",
            "@name": "Date",
            "subtypelist": null
        },
        {
            "@id": "4",
            "@name": "Text",
            "subtypelist": {
                "subtype": {
                    "@id": "2",
                    "@name": ""
                }
            }
        }
    ],
    {
        "@id": "8",
        "@name": "Numeric",
        "subtypelist": {
            "subtype": {
                "@id": "22",
                "@name": "0 (Integer)",
                "@validationregexp": "^-?[0-9]*$",
                "@validationmessage": "Decimal position must

```

match the value indicated in the Decimals field."

```
    }
  }
}
]
}
}
}
}
```

If there are multiple records returned, the record node in JSON response will represent the list of records, not a single record object.

Sample XML Response:

```
<PPMDResults s="advancedmd-api-processrequest-0-56745fc888-5kpxq" lst="04/18/2025 01:00:55">
  <Results>
    <record uid="1" fieldname="Field Name"
      fielddescription="Short Description" datatypeid="3"
      subtypeid="" selectlistid="" isrequired="0"
      includeintooltip="0" includeinepisode="0" displaylevelid="2"
      defaulttextvalue="" defaultfidvalue="" ordinal="1"
      changedat="2012-04-26 07:36:27" changedby="" createdat="2012-01-24 21:17:00"
      createdby="SYSTEM_5021" inuse="0" isactive="0"
      ishipaa="1" />
    <displaylevellist>
      <displaylevel id="1" name="Charge" />
      <displaylevel id="2" name="Visit" />
      <displaylevel id="3" name="Carrier" />
    </displaylevellist>
    <datatypeidlist>
      <datatype id="3" name="Date">
        <subtypelist />
      </datatype>
    </datatypeidlist>
  </Results>
</PPMDResults>
```

```

</datatype>
<datatype id="4" name="Text">
  <subtypelist>
    <subtype id="2" name="" />
  </subtypelist>
</datatype>
<datatype id="8" name="Numeric">
  <subtypelist>
    <subtype id="22" name="0 (Integer)"
validationregexp="^-?[0-9]*$" validationmessage="Decimal
position must match the value indicated in the Decimals
field." />
  </subtypelist>
</datatype>
</datatypelist>
</Results>
</PPMDResults>

```

Online Intake Actions

Create Intake Record

This is REST API.

Verb: Post

- URL template: *https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/intake/OnlineRequests*
- URL example: *https://providerapi.advancedmd.com/api/pm-api-101/API/intake/OnlineRequests*

Action: Create new online intake record.

Parameters:

"typeOfServiceId" - int, type of service identifier, list of those can be extracted by request "reasons for visit", (optional)

"facilityId" - int, id of the facility for the patient, (optional)

"usePracticeLocation" - bool, should be true if no facilityid specified, (required)

"profileId" - int. profile identifier of provider, (optional)

"apptTypeId" - int. Appointment type identifier, related to the typeOfService, (optional)

"intakeStatusId" - int. initial status of Intake, (optional)

"intakeRecordStatus" - int. related to "intakeStatusId", can be one of three values 1653 - new, 1654 - approved and 1655 - declined, (required)

"patientId" - int. id of the patient, (required)

"carrierCategoryId" - int. id of the carrier, (optional)

"customData": { (required)

 "insuranceId": "string", (optional)

 "submittedDate": "2021-08-19T13:43:16.904Z", (required)

 "shouldSaveCustomData": true, (optional)

 "sataQuestions": [(optional)

```
        "string"
    ],
    "isPatient": true, (optional)
    "isLegalGuardian": true, (optional)
    "submitterFirstName": "string", (optional)
    "submitterLastName": "string", (optional)
    "submitterPhone": "string", (optional)
    "referringProvider": "string", (optional)
    "primaryProvider": "string", (optional)
    "additionalInsurance": "string", (optional)
    "additionalDetails": "string", (optional)
    "referralInfo": "string" (optional)
}
```

Sample of successful JSON request:

```
{
  "usePracticeLocation": true,
  "intakeRecordStatus": 1653,
  "patientId": 409598,
  "customData": {
    "submittedDate": "2021-08-19T07:53:47.472Z"
  }
}
```

Sample of successful response:

```
{
  "typeofserviceid": null,
  "facilityid": null,
  "usepracticelocation": true,
  "profileid": null,
}
```

```
"appttypeid": null,  
"intakestatusid": 11,  
"appointmentid": null,  
"intakerecordstatus": 1653,  
"id": 232,  
"patientid": 409598,  
"carriercategoryid": null,  
"intakerequestid": null,  
"customdata": null  
}
```

Create Intake Record

This is REST API.

Verb: Put

- URL template: *https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/intake/OnlineRequests/{status_id}*
- URL example: *https://providerapi.advancedmd.com/api/pm-api-101/API/intake/onlinerequests/1653*

Action: Changes status of all records whose IDs passed in a body to status, which ID is specified in the path.

All possible status IDs:

- 1653 - new (default)
- 1654 - approved
- 1655 - declined (should be used as a replacement for deleting)

Sample of successful JSON request:

```
[
  181
]
```

Sample of successful response:

```
[
  {
    "typeofserviceid": 6,
    "facilityid": 282,
    "usepracticelocation": false,
    "profileid": 55,
```

```
    "appttypeid": null,  
    "intakestatusid": 11,  
    "appointmentid": null,  
    "intakerecordstatus": 1653,  
    "id": 181,  
    "patientid": 429673,  
    "carriercategoryid": 99,  
    "intakerequestid": null,  
    "customdata": null  
  }  
]
```

Decline All Intake Records by Patient ID

This is REST API.

Verb: Put

- URL template: `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/intake/OnlineRequests/decline/{patient_id}`
- URL example: `https://providerapi.advancedmd.com/api/pm-api-101/API/intake/onlineRequests/decline/429673`

Sample of successful JSON request:

no body here

Sample of successful response:

```
[
  {
    "typeofserviceid": 6,
    "facilityid": 282,
    "usepracticelocation": false,
    "profileid": 55,
    "appttypeid": null,
    "intakestatusid": 11,
    "appointmentid": null,
    "intakerecordstatus": 1655,
    "id": 178,
    "patientid": 429673,
    "carriercategoryid": 99,
    "intakerequestid": null,
    "customdata": null
  },
]
```

```
{
  "typeofserviceid": 6,
  "facilityid": 314,
  "usepracticelocation": false,
  "profileid": 55,
  "appttypeid": 2726,
  "intakestatusid": 11,
  "appointmentid": null,
  "intakerecordstatus": 1655,
  "id": 180,
  "patientid": 429673,
  "carriercategoryid": 99,
  "intakerequestid": null,
  "customdata": null
}
]
```

Get Paged Intake Records

This is REST API.

Verb: Post

- URL template: *https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/intake/onlinerequests/paged*
- URL example: *https://providerapi.advancedmd.com/api/pm-api-101/API/intake/onlinerequests/paged*

Action: Get paged intake records.

Sample of successful JSON request:

```
{
  "page": 0,
  "pageSize": 25,
  "startDateTime": "2021-05-16T00:00:00+03:00",
  "endDateTime": "2021-06-14T23:59:59+03:00",
  "includeDeclined": false,
  "includeConfirmed": false,
  "highlightOlderThan": 7,
  "rangeType": 0,
  "sortColumn": "patient",
  "sortAscending": true,
  "patientSearchName": null,
  "profileDescription": null,
  "reasonForVisitId": 0,
  "facilityId": 0,
  "carrierCategoryId": 0
}
```

Sample of successful response:

```

{
  "totalcount": 2,
  "items": [
    {
      "fullname": "321553135, 21515",
      "phone": "4361634663",
      "dateofbirth": "2020-06-04T00:00:00",
      "reasonforvisit": "Anemia",
      "intakestatusid": 46,
      "carriercategoryid": 40,
      "carriercategorydescription": "AETNA",
      "carriercategorycode": "AETNA",
      "createdat": "2021-06-11T03:27:10.977",
      "createdatutc": "2021-06-11T10:27:10.977Z",
      "changedat": "2021-08-18T04:42:50.527",
      "changedatutc": "2021-08-18T11:42:50.527Z",
      "haspatientmergeconflict": false,
      "submitterfullname": "",
      "submitterphone": "",
      "patientinactive": false,
      "notescount": 0,
      "id": 172,
      "licensekey": 0,
      "patientid": 429638,
      "facilityid": 314,
      "usepracticelocation": false,
      "profileid": 27,
      "appttypeid": 39,
      "firstname": null,
      "lastname": null,
      "email": "22424@C.C",
      "appointmentid": null,
      "intakerecordstatus": 1653,
      "typeofserviceid": null
    }
  ]
}

```

```

    },
    {
      "fullname": "VKSMITH, JEMMA",
      "phone": "7372001575",
      "dateofbirth": "2021-05-06T00:00:00",
      "reasonforvisit": "Anemia",
      "intakestatusid": 11,
      "carriercategoryid": 43,
      "carriercategorydescription": "UNICARE",
      "carriercategorycode": "UNIC ",
      "createdat": "2021-05-27T07:09:18.523",
      "createdatutc": "2021-05-27T14:09:18.523Z",
      "changedat": "2021-05-27T07:09:18.523",
      "changedatutc": "2021-05-27T14:09:18.523Z",
      "haspatientmergeconflict": true,
      "submitterfullname": "",
      "submitterphone": "",
      "patientinactive": true,
      "notescount": 0,
      "id": 171,
      "licensekey": 0,
      "patientid": 429627,
      "facilityid": 282,
      "usepracticelocation": false,
      "profileid": 54,
      "appttypeid": 38,
      "firstname": null,
      "lastname": null,
      "email": "ALISAVKFAY@GMAIL.COM",
      "appointmentid": null,
      "intakerecordstatus": 1653,
      "typeofserviceid": null
    }
  ]

```

}



Settings for Online Intake Requests

This is REST API.

Verb: Put

- URL template: *https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/ols/Settings*
- URL example: *https://providerapi.advancedmd.com/api/pm-wfe-100/API/-masterfile/ols/Settings*

Action: Required one-time settings to enable other online intake requests.

Sample of successful JSON request:

```
{
  "licenseKey":991207,
  "id":4,
  "useColumnBookingConstraints":true,
  "chargeNoShowAmount":25,
  "chargeCancellationAmount":25,
  "chargeCancellationTimespan":24,
  "timeZone":{
    "id":5,
    "timezoneid":"Alaskan Standard Time",
    "name":"Alaskan Standard Time",
    "offset":"-09:00:00",
    "abbreviation":"AKST"
  },
  "intakeType":1650,
  "daysBeforeAppt":0,
  "maxFutureAppts":null,
  "maxCancellations":null,
  "maxMovedAppts":null,
  "maxNoShows":null,
```

```

    "facilityId":282,
    "useCancellationCharge":false,
    "useNoShowsCharge":false,
    "useBlockStatus":false,
    "usePatientInstructions":true,
    "intakeEnabled":true,
    "showUpfrontDisclaimer":false,
    "defaultDisclaimer":"Please complete the form and click on
the submit button at the bottom of the form. Once we have
received your request it will be reviewed by our staff and we
will attempt to match you to an appropriate clinician. One of
our staff will contact you by telephone or email, usually
within 5-7 business days and inform you as to whether we can
meet your needs. ",
    "intakeQuestionOrder":1660
}

```

Sample of successful response:

```

{
  "licensekey": 991207,
  "id": 4,
  "usecolumnbookingconstraints": true,
  "chargenoshowsamount": 25.0,
  "chargecancellationamount": 25.0,
  "chargecancellationtimespan": 24,
  "maxfutureappts": null,
  "maxcancellations": null,
  "maxmovedappts": null,
  "maxnoshows": null,
  "facilityid": 282,
  "usecancellationcharge": false,
  "usenoshowscharge": false,
  "useblockstatus": false,
  "showupfrontdisclaimer": false,

```

"defaultdisclaimer": "Finding the most appropriate mental health clinician can be very difficult and confusing. Our staff will do everything possible to connect you with the most appropriate clinician for your needs. To make this process more efficient we ask you that you complete a brief intake form below. Please complete the form and click on the submit button at the bottom of the form. Once we have received your request it will be reviewed by our staff and we will attempt to match you to an appropriate clinician. One of our staff will contact you by telephone or email, usually within 5-7 business days and inform you as to whether we can meet your needs. ",

```
"usepatientinstructions": true,
"daysbeforeappt": 0,
"disclaimermodifieddate": null,
"timezone": {
  "id": 5,
  "timezoneid": "Alaskan Standard Time",
  "name": "Alaskan Standard Time",
  "offset": "-09:00:00",
  "abbreviation": "AKST"
},
"intaketype": 1650,
"intakeenabled": true,
"intakequestionorder": 1660
}
```

Update Intake Record

This is REST API.

Verb: Patch

- URL template: *https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/intake/OnlineRequests/{Intake_id}*
- URL example: *https://providerapi.advancedmd.com/api/pm-api-101/API/intake/onlinerequests/173*

Action: Update online intake record.

Sample of successful JSON request:

```
[
  {
    "op": "replace",
    "path": "/facilityId",
    "value": 314
  }
]
```

Sample of successful response:

```
{
  "typeofserviceid": 32,
  "facilityid": 314,
  "usepracticelocation": false,
  "profileid": 344,
  "appttypeid": 165,
  "intakestatusid": 11,
  "appointmentid": null,
  "intakerecordstatus": 1653,
}
```

```
"id": 173,  
"patientid": 429639,  
"carriercategoryid": 46,  
"intakerequestid": null,  
"customdata": null  
}
```

Update Status of Intake Record

This is REST API.

Verb – PUT

Template of URL – `https://providerapi.advancedmd.com/api/{HOST}/{APPNAME}/intake/OnlineRequests/{status_id}`

Example – `https://providerapi.advancedmd.com/api/pm-api-101/API/intake/onlinerequests/1653`

Action: Changes status of all records whose id's passed in a body to status, which id is specified in the path.

All possible status ids:

1653 – new (default one)

1654 – approved

1655 – declined (it should be used as a replacement for deleting)

Sample of Successful JSON Request:

```
[
  181
]
```

Sample of Successful Response:

```
[
  {
    "typeofserviceid": 6,
    "facilityid": 282,
```

```
    "usepracticelocation": false,  
    "profileid": 55,  
    "appttypeid": null,  
    "intakestatusid": 11,  
    "appointmentid": null,  
    "intakerecordstatus": 1653,  
    "id": 181,  
    "patientid": 429673,  
    "carriercategoryid": 99,  
    "intakerequestid": null,  
    "customdata": null  
  }  
]
```

System Defaults Requests

Getting System Defaults

Action: getsysdefaults

Sample XML:

```
<ppmdmsg action="getsysdefaults" class="api"
msgtime="5/22/2015 3:56:48 PM"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getsysdefaults",
    "@class": "api",
    "@msgtime": "5/22/2015 3:56:48 PM"
  }
}
```

Results:

The following result shows the xml returned to user. To make it easier to understand, the structure inside the category was deleted except for Transaction History category shown below:

Sample XML:

```
<PPMDResults>
  <Results success="1">
    <categories>
      <category uid="46" seq="0" name="Demographics">
        <defaults />
      <categories>
```

```

        <category uid="57" seq="0" name="General">
        <category uid="58" seq="1" name="Patient">
        <category uid="59" seq="2" name="Responsible
Party">
        <category uid="60" seq="3" name="Insurance">
        </categories>
    </category>
    <category uid="61" seq="0" name="Transaction Entry">
    <category uid="62" seq="1" name="Transaction History">
    <category uid="63" seq="2" name="Documents and
Images">
    <category uid="64" seq="3" name="Statements">
    <category uid="65" seq="4" name="Reports">
    <category uid="66" seq="5" name="Appointments">
    <category uid="67" seq="6" name="Memo & Notes">
    </categories>
</Results>
<Error />
</PPMDResults>

```

Sample JSON:

```

{
  "PPMDResults": {
    "Results": {
      "@success": "1",
      "categories": {
        "category": [
          {
            "@uid": "46",
            "@seq": "0",
            "@name": "Demographics",
            "defaults": null,

```

```

"categories": {
  "category": [
    {
      "@uid": "57",
      "@seq": "0",
      "@name": "General"
    },
    {
      "@uid": "58",
      "@seq": "1",
      "@name": "Patient"
    },
    {
      "@uid": "59",
      "@seq": "2",
      "@name": "Responsible Party"
    },
    {
      "@uid": "60",
      "@seq": "3",
      "@name": "Insurance"
    }
  ]
},
{
  "@uid": "61",
  "@seq": "0",
  "@name": "Transaction Entry"
},
{
  "@uid": "62",
  "@seq": "1",
  "@name": "Transaction History"
}

```

```

    },
    {
      "@uid": "63",
      "@seq": "2",
      "@name": "Documents and Images"
    },
    {
      "@uid": "64",
      "@seq": "3",
      "@name": "Statements"
    },
    {
      "@uid": "65",
      "@seq": "4",
      "@name": "Reports"
    },
    {
      "@uid": "66",
      "@seq": "5",
      "@name": "Appointments"
    },
    {
      "@uid": "67",
      "@seq": "6",
      "@name": "Memo & Notes"
    }
  ]
}
},
"Error": null
}
}

```

The following is an example of Transaction History category.

Sample XML:

```
<category uid="48" seq="2" name="Transaction History">
  <defaults>
    <default uid="260" seq="0" name="HistoryAutoFilter"
description="Auto-Filter Transaction History"
elementtype="radio" datatype="boolean" systemdefault="1"
readonly="0" value="1" valuedescription="Yes"
modifieduser="SYSTEM" modifieddate="2015-11-17 16:13:32">
      <extrainfo>
        <radiolist>
          <radio value="1">Yes</radio>
          <radio value="0">No</radio>
        </radiolist>
      </extrainfo>
    </default>
    <default uid="261" seq="1" name="HistoryPageSize"
description="Number of charges displayed per page"
elementtype="select" datatype="string" systemdefault="1"
readonly="0" value="17" valuedescription="17"
modifieduser="SYSTEM" modifieddate="2015-11-17 16:13:32">
      <extrainfo>
        <selectlist>
          <option value="17">17</option>
          <option value="25">25</option>
          <option value="30">30</option>
          <option value="40">40</option>
          <option value="50">50</option>
          <option value="75">75</option>
          <option value="100">100</option>
        </selectlist>
      </extrainfo>
    </default>
    <default uid="262" seq="2" name="HistoryPageStart"
description="Page if history count is greater than"
elementtype="select" datatype="string" systemdefault="1"
readonly="0" value="0" valuedescription="Disabled"
modifieduser="SYSTEM" modifieddate="2015-11-17 16:13:32">
      <extrainfo>
```

```

        <selectlist>
            <option value="0">Disabled</option>
            <option value="17">17</option>
            <option value="25">25</option>
            <option value="30">30</option>
            <option value="40">40</option>
            <option value="50">50</option>
            <option value="75">75</option>
            <option value="100">100</option>
        </selectlist>
    </extrainfo>
</default>
</defaults>
<categories />
</category>

```

Sample JSON:

```

{
  "category": {
    "@uid": "48",
    "@seq": "2",
    "@name": "Transaction History",
    "defaults": {
      "default": [
        {
          "@uid": "260",
          "@seq": "0",
          "@name": "HistoryAutoFilter",
          "@description": "Auto-Filter Transaction History",
          "@elementtype": "radio",
          "@datatype": "boolean",
          "@systemdefault": "1",

```

```

"@readonly": "0",
"@value": "1",
"@valuedescription": "Yes",
"@modifieduser": "SYSTEM",
"@modifieddate": "2015-11-17 16:13:32",
"extrainfo": {
  "radiolist": {
    "radio": [
      {
        "@value": "1",
        "#text": "Yes"
      },
      {
        "@value": "0",
        "#text": "No"
      }
    ]
  }
},
{
  "@uid": "261",
  "@seq": "1",
  "@name": "HistoryPageSize",
  "@description": "Number of charges displayed per
page",
  "@elementtype": "select",
  "@datatype": "string",
  "@systemdefault": "1",
  "@readonly": "0",
  "@value": "17",
  "@valuedescription": "17",
  "@modifieduser": "SYSTEM",
  "@modifieddate": "2015-11-17 16:13:32",

```

```
"extrainfo": {
  "selectlist": {
    "option": [
      {
        "@value": "17",
        "#text": "17"
      },
      {
        "@value": "25",
        "#text": "25"
      },
      {
        "@value": "30",
        "#text": "30"
      },
      {
        "@value": "40",
        "#text": "40"
      },
      {
        "@value": "50",
        "#text": "50"
      },
      {
        "@value": "75",
        "#text": "75"
      },
      {
        "@value": "100",
        "#text": "100"
      }
    ]
  }
}
```

```

    },
    {
      "@uid": "262",
      "@seq": "2",
      "@name": "HistoryPageStart",
      "@description": "Page if history count is greater
than",
      "@elementtype": "select",
      "@datatype": "string",
      "@systemdefault": "1",
      "@readonly": "0",
      "@value": "0",
      "@valuedescription": "Disabled",
      "@modifieduser": "SYSTEM",
      "@modifieddate": "2015-11-17 16:13:32",
      "extrainfo": {
        "selectlist": {
          "option": [
            {
              "@value": "0",
              "#text": "Disabled"
            },
            {
              "@value": "17",
              "#text": "17"
            },
            {
              "@value": "25",
              "#text": "25"
            },
            {
              "@value": "30",
              "#text": "30"
            }
          ]
        }
      }
    }
  ]
}

```

```

    {
      "@value": "40",
      "#text": "40"
    },
    {
      "@value": "50",
      "#text": "50"
    },
    {
      "@value": "75",
      "#text": "75"
    },
    {
      "@value": "100",
      "#text": "100"
    }
  ]
}
}
}
]
},
"categories": null
}
}

```

Notes:

- *The success attribute in the Results element is unnecessary, since a failure will return an error message*
- *Since default values can change during a user's session, they should generally be retrieved each time they are needed*

Custom Tab Request

Getting Custom Data

Action: getcustomdata

This call provides the custom data for a selected patient. The results show the instance of a template. One can match the templates returned in the call "selectuserfiletemplates" by the <template id=[value]> element. If you view the results of "selectuserfiletemplates" under the master files section, you will notice that the <record> element has an attribute "uid" with the values of "64" and the <template> element in the results below has the attribute "id" with the value of "64".

Sample XML:

```
<ppmdmsg action="getcustomdata" class="providerdesktop"
msgtime="12/17/2005 11:38:52 PM"
patientid="49385" includeindemographics="1"
includeonfacesheet="1"/>
```

Sample JSON:

```
{
  "ppmdmsg": {
    "@action": "getcustomdata",
    "@class": "providerdesktop",
    "@msgtime": "12/17/2005 11:38:52 PM",
    "@patientid": "49385",
    "@includeindemographics": "1",
    "@includeonfacesheet": "1"
  }
}
```

Results:

This request returns an attribute newid in <PPMDResults> element that is the ID of the newly added note type.

Sample XML:

```
<?xml version="1.0" ?>< PPMDResults> <Results> <patientlist>
<patient id="49385" visitid="253472" visitdos="12/14/2005">
<templatelist> <template id="64"> <instancelist>
<instance id="8979" createdat="2005-12-17T23:52:12.300"
createdby="PPMD_AKHAN" changedat=""changedby="">
<fieldvaluelist> <fieldvalue id="1153797"
templatefieldid="266"
ordinal="266" value="12/17/2005" valuecode="2005-12-
17T00:00:00"
valuename="" createdat="2005-12-17T23:52:12.300"
createdby="PPMD_AKHAN"
changedat="" changedby=""
/> </fieldvaluelist> </instance>
<instance id="8980" createdat="2005-12-17T23:52:27.283"
createdby="PPMD_AKHAN"
changedat="2005-12-17T23:53:25."changedby="PPMD_AKHAN">
<fieldvaluelist> <fieldvalue id="1153798"
templatefieldid="266"
ordinal="266" value="09/10/2002" valuecode="2002-09-
10T00:00:00"
valuename="" createdat="2005-12-17T23:52:27.283"
createdby="PPMD_AKHAN"
changedat="2005-12-17T23:53:25."changedby="PPMD_AKHAN" />
</fieldvaluelist> </instance> </instancelist>
</template> </templatelist> </patient> </patientlist> </
Results>
< /PPMDResults>
```

Sample JSON:

```
{
```

```

"?xml": {
  "@version": "1.0"
},
"PPMDResults": {
  "Results": {
    "patientlist": {
      "patient": {
        "@id": "49385",
        "@visitid": "253472",
        "@visitdos": "12/14/2005",
        "templatelist": {
          "template": {
            "@id": "64",
            "instancelist": {
              "instance": [
                {
                  "@id": "8979",
                  "@createdat": "2005-12-17T23:52:12.300",
                  "@createdby": "PPMD_AKHAN",
                  "@changedat": "",
                  "@changedby": "",
                  "fieldvaluelist": {
                    "fieldvalue": {
                      "@id": "1153797",
                      "@templatefieldid": "266",
                      "@ordinal": "266",
                      "@value": "12/17/2005",
                      "@valuecode": "2005-12-17T00:00:00",
                      "@valuenam": "",
                      "@createdat": "2005-12-
17T23:52:12.300",
                      "@createdby": "PPMD_AKHAN",
                      "@changedat": "",
                      "@changedby": ""

```


Complete Field Lists

The following lists contain all of the fields that are currently available for each of the "get" actions described above. Please note that AdvancedMD may choose to add fields to the action responses, but will make every effort to avoid removing any fields or changing their contents from what is expected.

Action: getupdatedpatients

Required attributes:

These attributes will be returned for every patient and insurance coverage, regardless of any other optional fields requested. The attribute names cannot be changed, and should not be duplicated when defining that attribute names that will represent any optional fields.

Element	Attribute	Notes
patient	id	Unique identifier of the patient
	updatestatus	Reason the patient was returned: N = New patient, C = Patient or insurance (if <insurance> element was included in the request) has been changed, D = Patient has been deleted.
insurance	id	Unique identifier of the insurance coverage

Optional fields:

The following fields are available to be included in the request:

Element	Field	Notes
patient	LicenseKey	This is the Office Key number for the AdvancedMD data-base being accessed.
	Patient_UID	This is the value returned automatically in the id attribute.
	LastName	

	FirstName	
	MiddleName	
	Name	For convenience, combines the patient's first, middle and last name (e.g. "DOE,JOHN Q").
	Chart	
	Title	
	Address1	
	Address2	
	City	
	State	
	Zip	
	EmployerID	
	Employer	
	InsOrder	
	OfficePhone	
	OfficeExt	
	HomePhone	
	OtherPhone	
	OtherType	
	Email	
	MaritalStatus	
	DOB	
	Deceased	
	Sex	
	SSN	
	Relationship	Relationship to responsible party.
	RespParty	

	RPLastName	
	RPFirstName	
	RPMiddleName	
	RPFullName	
	RPAAddress1	
	RPAAddress2	
	RPCity	
	RPState	
	RPZipCode	
	RPEmployer	
	RPAcctTypeCode	
	RPAcctTypeDescription	
	RPOfficePhone	
	RPOfficeExtension	
	RPHomePhone	
	RPOtherPhone	
	RPOtherPhoneType	
	RPEmail	
	RPDOB	
	RPGender	
	RPSSN	
	RPTitle	
	RPEmploymentStatus	
	RPCreatedAt	
	RPCreatedBy	
	RPDisplay	
	RPChangedAt	
	RPChangedBy	
	ProvProfile	

	ProvProfileCode	
	ProvLastName	
	ProvFirstName	
	ProvMiddleName	
	ProvFullName	
	FinClass	
	FinClassCode	
	FinClassDescription	
	CreatedAt	
	CreatedBy	
	ChangedAt	
	ChangedBy	
	Display	
	ICCreatedAt	
	ICChangedAt	
	Ethnicity	
	Language	
	Races	
insurance	Active	
	SequenceNumber	
	EffectiveStartDate	
	EffectiveEndDate	
	CarCode	
	CarName	
	CarCreatedBy	
	CarCreatedAt	
	CarAddress1	
	CarAddress2	
	CarZipCode	

	CarCity	
	CarState	
	CarContactName	
	CarDME	
	CarDisplay	
	CarRequireReferral	
	CarChangedAt	
	Coverage	
	SubIDNumber	
	SubRelationship	
	SubAcctNumber	
	SubLastName	
	SubFirstName	
	SubMiddleName	
	SubFullName	
	SubAddress1	
	SubAddress2	
	SubZipCode	
	SubCity	
	SubState	
	SubEmployer	
	SubOfficePhone	
	SubOfficeExtension	
	SubHomePhone	
	OtherPhone	
	SubOtherPhoneType	
	SubEmail	
	SubDOB	
	SubGender	

	SubSSN	
	SubTitle	
	SubEmploymentStatus	
	SubCreatedAt	
	SubCreatedBy	
	SubDisplay	
	SubChangedAt	
	SubChangedBy	
	GroupName	
	GroupNumber	
	CopayDollarAmount	
	CopayPercentageAmount	
	AnnualDeductible	
	DeductibleAmountMet	
	YearEndMonth	
	LifeTimeBenefit	
	CreatedBy	
	CreatedAt	
	ChangedAt	
	ChangedBy	
referralplan	ReferralPlan_UID	
	ReferralType	
	DefaultinChargeEntry	
	ByReferringProviderFID	
	ToReferringProviderFID	
	Reason	
	PreAuthCode	
	ExpirationDate	
	MaxCharge	

	UsedCharge	
	MaxAuthVisits	
	AuthVisitsUsed	
	ChargeCodeFID	
	StatusCodeFID	
	FacilityFID	
	PreAuthorizationRequired	
	SequenceNumber	
	ReferralPlanSourceFID	
	DiagnosisCodes	
	CreatedBy	
	CreatedAt	
	ChangedBy	
	ChangedAt	

Optional fields for getupdatedvisits

Required attributes:

These attributes will be returned for every visit, patient, and insurance coverage, regardless of any other optional fields requested. The attribute names cannot be changed, and should not be duplicated when defining that attribute names that will represent any optional fields.

Element	Attribute	Notes
visit	id	Unique identifier of the visit
	updatestatus	Reason the visit was returned: N = New visit, C = Visit has been changed, D = Visit has been deleted.
patient	id	Unique identifier of the patient
insurance	id	Unique identifier of the insurance coverage

Optional fields:

The following fields are available to be included in the request:

Element	Field	Notes
visit	LicenseKey	This is the Office Key number for the AdvancedMD database being accessed
	Visit_UID	This is the value returned automatically in the id attribute
	PatientID	The unique identifier of the patient. This will match the id attribute in the associated <patient> element, if requested, or, if the patients were retrieved using getupdatedpatients, there will be a matching patient in the results of that call.
	ColumnHeading	
	AppointmentType	
	VisitStartDateTime	This is a composite date/time value that can also be retrieved as separate date and time values, using VisitDate and VisitStartTime
	VisitDate	
	VisitStartTime	
	Duration	The duration of the appointment in minutes
	Color	The color of the appointment when displayed in the appointment scheduler
	ProfileCode	The profile code associated with the visit

	ProviderName	The name of the provider associated with the visit
	Comments	
	ApptStatus	A numeric status. The list of possible values is available in a separate document. Values below 10 indicate an appointment that appears in the schedule (i.e., it hasn't been deleted or canceled).
	ArriveTime	
	OtherTime	
	SeenTime	
	ChargesPosted	
	ConfirmMethod	
	ConfirmedAt	
	ConfirmedBy	
	Episode	
	FacilityCode	
	FacilityName	
	VisitNote	
	InsuranceBillingOrder	
	AcceptAssignment	
	ForcePaperClaim	
	CreatedAt	
	CreatedBy	
	ModifiedAt	
	ModifiedBy	
patient	Same as <patient> element for getupdatedpatients	

insurance	Same as <insurance> element for getupdatedpatients
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AdvancedMDError Codes

Login/Security Errors (vbObjectError + 1024-2047)					
Code	Description	Type	Extra Info	Notes	Added By
1024	Invalid username or password	Client		This occurs if the user enters a username/password/licensekey combination that doesn't match any in the Enterprise database. (&H80040400 / - 2147220480)	JTY
1025	Session has timed out	Client		The client needs to be forced to log back in to the application before continuing. (&H80040401 / - 2147220479)	JTY
1026	Invalid host IP address	Client		The user is attempting to log in from an IP address that is unauthorized for the given license key. (&H80040402 / - 2147220478)	JTY
1027	Version mismatch	Client		The database version does not match the web application version. (Can be	JTY

				overridden.) (&H80040403 / - 2147220477)	
XML Errors (2048-3071)					
2048	Missi ng attrib ute	Serv er		An element is missing a required attribute. (&H80040800 / - 2147219456)	JTY
2049	Missi ng elem ent	Serv er		A required element is missing. (&H80040801 / - 2147219455)	JTY
2050	Invali d elem ent	Serv er		An element passed in as part of a request is of an incorrect type, or the element name is missing. (&H80040802 / - 2147219454)	JTY
2051	Invali d attrib ute	Serv er		An attribute passed in as part of a request is invalid. (&H80040803 / - 2147219453)	JTY
2052	Parsi ng error	Serv er	The XML that cause d the error.	An error occurred while attempting to parse XML. The description will contain .parseError.reason. (&H80040804 / - 2147219452)	JTY
2053	XML too	Serv er		In order to defend against DOS	JTY

	large			attacks, XMLRPC requests are limited in size. If this error comes up in production, then the maximum size is probably to small. (&H80040805 / - 2147219451)	
General Errors (3072-4095)					
3072	Maximum quantity exceeded	Server		Some maximum quantity has been exceeded. (&H80040C00 / - 2147218432)	JTY
3073	Missing registry value	Server		A required value is missing from the registry. (&H80040C01 / - 2147218431)	JTY
3074	Could not read COM+ constructor string	Server		A COM+ constructor string is required (for the component that reported the error), but is missing or invalid. (&H80040C02 / - 2147218430)	JTY
3075	Could not get list of statement formats from MDB	Server		An error occurred that prevented a list of statement formats from being returned. (&H80040C03 / - 2147218429)	JTY
3076	Failed to write off small	Server		An error occurred that prevented small write-offs from being written	JTY

	balances			off. Check the event log for more information. (&H80040C04 / - 2147218428)	
3077	Obsolete action	Server		The client made an XMLRPC call with an "action" that is obsolete. The client code should be changed to use a newer version of the action. (&H80040C05 / - 2147218427)	JTY
3078	No unique ID included with the update	Server		The front-end attempted to update a record without providing the unique ID of that record (&H80040C06 / - 2147218426)	ACB
3079	Invalid property setting	Server		A property of the current object ("Me") is invalid. The current operation cannot be performed until the property is set to a valid value or object. (&H80040C07 / - 2147218425)	JTY
3080	Wrong number of optional or ParamArray parameters.	Server		The method that is being called requires a certain number of optional parameters, or it has a ParamArray that requires complete sets of 2, 3, 4, etc., parameters in order to be valid.	JTY

				(&H80040C08 / - 2147218424)	
3081	Could not create object.	Server		An attempt was made to create an object, but the attempt failed. (&H80040C09 / - 2147218423)	JTY
3082	Missing parameter.	Server		A required parameter is missing or empty. (&H80040C0A / - 2147218422)	JTY
3083	Invalid path.	Server		The path is invalid. (&H80040C0B / - 2147218421)	JTY
3084	Too many rows affected by update	Server		Too many rows were affected by a SQL update command. (&H80040C0C / - 2147218420)	ACB
3085	Permission denied	Server	Details of the denied permission	Permission has been denied to the requested operation. (&H80040C0D / - 2147218419)	ACB
3086	This application version is obsolete.	Server		This occurs if the user is running a version of an embedded app on the pocket pc that is not supported.. Applies to Handheld Charge Slips and EMR, specifically. (&H80040C0E / - 2147218418)	CAG
3087	Gateway returned empty	Server		The Gateway function has returned an empty string, rather than a	ACB

	string			results or error string as would be expected. (&H80040C0F / - 2147218417)	
3088	Action not found in action-SP map	Server		The action that is being requested was not found in the action-SP map, and so the stored procedure that is needed to complete the request cannot be accessed. (&H80040C10 / - 2147218416)	ACB
3089	The masterfile was not saved, but no error was caught	Server		The stored procedure that saved the masterfile did not return a valid UID for the new record, but did not throw an error. (&H80040C11 / - 2147218415)	ACB
3090	Cannot redirect login twice	Server		When a user logs in to a PPMD server, he can be redirected to another server (for example, redirected from http://www.perfectpractice.md/ to beta.perfectpractice.md). But the user CANNOT be redirected again from the redirected server. This exception is raised if redirection is indicated on the redirected server (in the ent_	JTY

				SecurityGroup table). (&H80040C12 / - 2147218414)	
3 0 91	GUID could not be generated	Server		A unique identifier (GUID) is generated each time a user logs in to the application, using the Win32 CoCreateGuid API. If that function returns a non-zero value, then the call failed for an unknown reason. (&H80040C13 / - 2147218413)	JT Y
3 0 92	Constructo r string missing	Server		This occurs if no constructor string is found for component, and the component requires it. The error is posted in the gateway method (if it exists), before any other methods are invoked. (&H80040C14 / - 2147218412)	C A G
3 0 93	Unhandled ADO error (s) caught when closing the connectio n.	Server		Occasionally, errors can occur in a SQL stored procedure or query without the exception(s) being raised by ADO to VB. In these cases, a function called CheckConnectionErrors () will find errors in the ADO Errors collection, log those errors, and raise this error back to	JT Y

				the caller. The ADO errors that caused the problem will be included in the error message. (&H80040C15 / - 2147218411)	
3094	Only self-expanding executables are supported at this time.	Server		The CPGP class in PPMDReportServer.exe only supports PGP encryption of self-expanding executables. (This error message will become obsolete as soon as more support is added.) (&H80040C16 / - 2147218410)	JTY
3095	Pass phrase must be at least n characters long.	Server		The pass phrase for a PGP self-expanding executable must be at least n characters long. (&H80040C17 / - 2147218409)	JTY
3096	Pass phrase can not be longer than n characters.	Server		The pass phrase for a PGP self-expanding executable must be no longer than n characters. (&H80040C18 / - 2147218408)	JTY
3097	Operation timed out.	Server		The attempted operation timed out. (&H80040C19 / - 2147218407)	JTY
3098	A public key or passphrase	Server		In order to encrypt a file with PGP, you must provide either a public	JTY

	must be supplied.			key username or a passphrase. (&H80040C1A / - 2147218406)	
3099	Invalid statement grouping.	Server		The selected statement format does not support the grouping options set up in System Defaults or selected by the user. (&H80040C1B / - 2147218405)	JTY
3100	Invalid identity.	Server		The process that the server is trying to instantiate must run under an account in the Administrators security group, or it can't perform its function. (&H80040C1C / - 2147218404)	JTY
3101	Enterprise Database not responding.	Server		The enterprise database is not responding, due to an invalid server name or database name. (&H80040C1D / - 2147218403)	DCO
3102	Empty strings cannot be saved to file.	Server		An empty string was passed to the WriteBinFile() procedure. Zero-length strings cannot be saved as binary files. (&H80040C1E / - 2147218402)	JTY
31	Another family	Client		The user is trying to save a patient with the	CA

03	member already has a "self" relationship when the user tries to add a patient			relationship of "self" and a different responsible party. The responsible party has another patient tied to it (usually itself) that already has a relationship of "self". The user will not be able to save the new patient in this state, and must change the relationship from "self" to some other type (i.e. "spouse", "other") (&H80040C20 / - 2147218401)	G
3104	Invalid query location	Server		The user is attempting to run a report, but no query file or query sql was specified for the report.(&H80040C21 / - 2147218400)	CAG
3105	Data Extract To Access DB Failed	Server		The DTS package Failed to export data to an Access DB. This would most likely be caused by a bad path or because the blank access db is missing, It is possible that bad data or data that could not be transformed was encountered. (&H80040C21 / - 2147218399)	JTK
3106	McKesson submitter id invalid	Server		Electronic statements require a 6-digit	E.D

				submitter identifier for customers using McKesson. This identifier must reside in the edi_submitters database table, FormatCode of CYNSE. This submitter identifier is shared with the claim processing. (&H80040C22 / - 2147218398)	
3107	Sales tax procedure charge code (#ST) does not exist in this key.	Server		The user is attempting to add a sales tax charge, but can't because the #ST charge code doesn't exist. (&H80040c23 / - 2147218397)	JTY
User Warnings (3072-4095)					
4096	Circular reference in macro.	Client	The macro code that has the circular reference in it.	This indicates an error on the part of the user. A macro should never include circular references (e.g., Macro1 includes Macro2, which includes	JTY

				Macro1). (&H80041 000 / - 21472174 08)	
4 0 97	Charge could not be rebilled.	Client	-2: Insurance has \$0 balance. -1: Unknown reason.	This error may occur when the user clicks the Claim Billed button on the Charge Detail screen. It allows the UI to indicate to the user why rebill failed. Negative values in ExtraInfo indicate that the InsBilled flag could not be flipped. Positive values indicate that the flag WAS flipped, but there was no	JTY

				effect (for example, there was no billing history, so the next carrier to be billed didn't change). (&H80041001 / -2147217407)	
4098	Duplicate code: Item cannot be added.	Client	<p>-1: The duplicate item is active.</p> <p>-2: The duplicate item is deleted, and can be undeleted (Display = 1) if desired.</p>	The item that is being added has a code (or other field that must be unique) that already exists in the database. If the existing item has been deleted (Display = 0), then the user should be allowed to	JTY

				<p>undele it and use it.</p> <p>If the existing item is active (Display = 1), the user cannot save the new item with the same code, and must choose a new code or delete the existing item. (&H80041 002 / - 21472174 06)</p>	
4 0 99	There were no patients for the visit number entered.	Client		The visit number entered by the user was not found in the database so no patient informatio n could be	SLS

				returned. (&H80041 003 / - 21472174 05)	
4 1 00	An error occurred while updating statement history.	Client		Statement data was returned successfully, but the statement history could not be updated. Examine the Windows NT Event Log for more information about the cause of the error. (&H80041 004 / - 21472174 04)	JTY
4 1 01	Can't add appointment: Overlaps existing appointment.	Client		The user tried to add an appointment that overlaps with an existing	JTY

				<p>appointment. The front end should ask the user if that's OK, and, if it is, resubmit the request with the "force" attribute set to "yes".</p> <p>(&H80041005 / - 2147217403)</p>	
4102	No open appointment slots were found.	Client	The number of days that were searched.	<p>The user tried to use the Find Appointment screen to find an open slot, but none were found that match the criteria given.</p> <p>(&H80041006 / - 2147217402)</p>	JTY

4 1 03	Duplicate SSN found	Client		The user attempted to add a patient whose Social Security Number already exists in the database. The patient was not added to the database. (&H80041 007 / - 21472174 01)	ACB
4 1 04	Duplicate name/DOB found	Client		The user attempted to add a patient whose name and date of birth already exist in the database. The patient was not added to	ACB

				the database. (&H80041008 / - 2147217400)	
4105	Duplicate chart number found	Client		The user attempted to add a patient whose Chart Number already exists in the database. The patient was not added to the database. (&H80041009 / - 2147217399)	ACB
4106	Another user has changed this record	Client		The user attempted to update a field in a record that has already been changed by another user.	ACB

				(&H80041 00A / - 21472173 98)	
4 1 07	No file was uploaded	Client		The user attempted to upload a file, but no valid file was chosen. (&H80041 00B / - 21472173 97)	JTY
4 1 08	Invalid search criteria	Client		The criteria entered by the user are invalid, or there is no way that the search can be performed with the given criteria. (&H80041 00C / - 21472173 96)	JTY
4 1 09	Patient photo already exists	Client		The current patient already has a	JTY

				"Patient Photo", and each patient can have only one. (&H8004100D / - 2147217395)	
4 1 10	The patient could not be checked out for this visit.	Client		The appointment status for the visit could not be changed to 3 ('checked out'). This may be because the status code for the visit is already 3 or higher. (&H8004100E / - 2147217394)	ACB
4 1 11	The specified user has no privileges loaded	Client		A user attempted to expire (and thereby force a	ACB

				<p>reload) of another user's permissions, but the second user had no permissions loaded. No permissions were expired, but the second user's permissions will be loaded fresh from the database anyway the next time they attempt to access the system. (&H8004100F / - 2147217393)</p>	
4 1 12	The new record conflicted with a previously deleted record	Client		A new record that the user has	ACB

				<p>attempted to save has violated a unique key constraint in the database, but the record that it conflicts with has had its display bit set to zero, and so is not currently visible to the user.</p> <p>(&H80041010 / -2147217392)</p>	
4113	Duplicate charge found	Client	The procedure code(s) that the attempted posted charge conflicts with	<p>After saving one or more charge entries, the user posts the charges. The attempted charges</p>	CAG

				are compared (by procedure code, date of service, provider, and patient) with those that exist in the database. If any conflicts occur, the user is notified and can decide whether to post the charges anyway.	
4 1 14	The record cannot be deleted because of child dependencies	Client		The record that the user attempted to delete has child records that refer to it, and have not themselves been deleted.	ACB

				<p>This record cannot be deleted as long as the child records remain. (&H80041012 / -2147217390)</p>	
4 1 15	<p>This insert cannot be completed because of conflicts in other license keys</p>	Client		<p>The record that is being inserted is being propagated to other license keys within the CBO by a trigger. However, one of these license keys is causing a unique key constraint error, and hence the entire transaction is failing.</p>	ACB

4 1 16	This record cannot be deleted, as it is the last remaining record	Client		This is the last remaining undeleted record in this table for this licensekey, and business rules require that there be at least one undeleted record in this table. (&H80041014 / - 2147217388)	ACB
4 1 17	Appointment is outside of column.	Client		You cannot create an appointment that starts outside the working hours for the column. (&H80041015 / - 2147217387)	JTY

4 1 18	Procedure already running	Client		A single use stored procedure was already running when the user tried to run it again. Used for the collections worklist recalc procedur e.	SSH
4 1 19	Takeback will be voided with the payment	Client		Log 7786. If the payment detail is the last remaining (or only) payment detail associated with the payment and there is a takeback amount AND the day closed bit is NOT set, then the user	CAG

				should be informed that there is a takeback that will be voided with the payment, and the takeback amount should be included in the offset payment record.	
4 1 20	The form cannot be batched because another user has already put the form in a batch.	Client		If a form is already associated with a batch for another license key, the user cannot put the form into the print queue (via the batch button). A form can only be associated with a	

				single licensekey for batch purposes.	
4 1 21	Too many blocks/holds would be returned.	Client	Count of rules that would have been returned.	There are too many block/hold rules that match the current criteria (Block/Ho ld Setup screen). The user needs to use the filter fields to narrow the selection and reduce the number of returned rules. (&H80041 019 / - 21472173 83)	JTY
4 1 22	Visit not found in the system.	Client		This occurs if a visit number is entered in the quick charge entry screen	CAG

				and the visit is not found in the system.	
4 1 23	Appointment already has charges posted to it	Client		You can't change the provider or facility associated with a visit from the appointment scheduler if the visit already has charges posted to it. (&H8004101B / -2147217381)	JTY
4 1 24	No active patient consent.	Client		The system requires consent, and this patient has no active consent memo. Occurs when the	CAG

				user attempts to check the patient in through the appointment scheduler.	
4 1 25	Deceased patient appointments exist	Client		Lets the user know that the patient which is now deceased has appointments and recall visits scheduled in the future. The user can then decide whether to delete the appts/recall visits	CAG
4 1 26	The provider specified is inactive	Client		Lets the user know that the provider specified when	SLS

				creating an appointment is set to inactive	
4 1 27	Deceased patient	Client		Lets the user know that the patient is deceased	CAG
4 1 28	Conflict with existing appointment	Client		The requested column change cannot be made due to a conflict with existing appointments.	AMK
4 1 29	Invalid mode	Client		Invalid mode is send by the client. No such mode exists.	AMK
4 1 30	Invalid Visit ID	Client		Invalid Visit ID passed to the API method.	AMK
4 1 31	Statements cannot be rolled back	Client		The user has	JTY

				<p>attempted to rollback a statement batch, but the system was unable to ensure that it could be rolled back safely. The user will need to call Advanced MD Support to perform the rollback. (&H80041024 / -2147217373)</p>	
4132	Can't reset a visit with payments attached to it	Client		<p>You cannot reset a visit with charges that have payments (voided or not) attached to them.</p>	JTY

				(&H80041 025 / - 21472173 72)	
4 1 33	Too many charges would be returned	Client		More than X charges would be returned (to Payment Entry screen). Allow the user to post payments without bringing all charges back. (&H80041 026 / - 21472173 71)	JTY
4 1 34	Access denied to API feature	Client		The license key does not have access to the API feature. (&H80041 027 / - 21472173 70)	AMK
4 2 00	A new version of the	Client		This occurs if	CAG

	application is available.			the user is running a version of an embedded app on the pocket pc that is still supported, but not current. Applies to Handheld Charge Slips and EMR, specifically.	
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Hard-Coded Values

Allergies Severity

Allergies Severity	
Mild	1
Mild to Moderate	2
Moderate	3
Moderate to Severe	4
Severe	5
Fatal	6

Allergy Status Lookup ID

Allergy Status Lookup ID	
Current	112
Historic	115

Appointment Colors

Appointment Color ID
RED
ORANGE
YELLOW
GREEN
BLUE
PURPLE
PINK
LILAC
BROWN
GRAY

BRICK
CREAM
SAGE
TEAL
PEACH
ROSE
MINT
LIME

Appointment Status

Description	Value
Made	0
Arrived	1
Other	2
Seen	3
Moved	5
Cancelled	10
Deleted	11
No Show	12

Batch Status

Description	Value
Open	O
Closed	C

Block/Hold Rule Values

Rule Type	Days of Week	Interval
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0 (Once)	NULL	NULL
1 (Daily)	NULL	NULL
2 (Weekly)	Bitmask: MTWHFSS, Monday is low-order bit. (E.g., Monday = 1, Tuesday = 2, Mon + Wed + Fri = 1 + 4 + 16 = 21.)	1 (weekly) 2 (bi-weekly)
3 (Monthly)	NULL - OR - 1-4 = 1st-4th, 5 = Last	Day of month - OR - 1 = Day 2 = Weekday 3-9 = Sun-Sat

Block Hold Types

Description	Value
Block	1
Hold	2
Cancel	3

Carrier Source of Payment

Description	Value
Self Pay	A
Workers Comp	B
Medicare	C
Medicaid	D
Other Federal Program	E
Commercial Insurance	F
Blue Cross/ Blue Shield	G

Champus	H
HMO	I
FEP	J
Central Certificate	K
Self Administered	L
Family or Friends	M
Other	Z

Carrier Type of Insurance

Description	Value
Medicare Primary	MP
Medicare Policy	MB
Medicare Cond. Policy	CP
Medigap Policy	MG
Medicaid Policy	MC
Commercial	C1
HMO	HM
Supplemental Policy	SP
Individual Policy	IP
Personal Payment	PP
Group Policy	GP
Litigation	LT
Auto Ins. Policy	AP
Long-term Policy	LD
Other	OT

Day Frequency of Block/Hold

Description	Value
Day	1
Workday	2
Sunday	3
Monday	4
Tuesday	5
Wednesday	6
Thursday	7
Friday	8
Saturday	9

Document History Actions

Description	Value
Created	0
Modify	1
Batched to Print	9
Print	10
Unprint	11
Approve	20
Unapprove	21
Lock	25
Unlock	26
Delete	30
Undelete	31

EligibilitySTC Response

Code	Description
1	Medical Care
2	Surgical
3	Consultation
4	Diagnostic X-Ray
5	Diagnostic Lab
6	Radiation Therapy
11	Used Durable Medical Equipment
12	Durable Medical Equipment Purchased
14	Renal Supplies in the Home
19	Pneumonia Vaccine
22	Social Work
30	Health Benefit Plan Coverage
33	Chiropractic
42	Home Health Care
47	Hospital
49	Hospital - Room and Board
62	MRI/CAT Scan
65	Newborn Care
66	Pathology
68	Well Baby Care
69	Maternity
73	Diagnostic Medical
76	Dialysis
78	Chemotherapy
79	Allergy Testing
80	Immunizations
81	Routine Physical

82	Family Planning
83	Infertility
86	Emergency Services
87	Cancer
93	Podiatry
98	Physician Visit - Office
A4	Psychiatric
A6	Psychotherapy
A7	Psychiatric - Inpatient
A8	Psychiatric - Outpatient
A9	Rehabilitation
AB	Rehabilitation - Inpatient
AC	Rehabilitation - Outpatient
AD	Occupational Therapy
AE	Physical Medicine
AF	Speech Therapy
AG	Skilled Nursing Care
AI	Substance Abuse
AJ	Alcoholism
AK	Drug Addiction
AL	Vision (Optometry)
AM	Frames
AO	Lenses
AP	Routine Eye Exam
BK	Orthopedic
BL	Cardiac
BM	Lymphatic
BN	Gastrointestinal
BP	Endocrine

BQ	Neurology
BT	Gynecological
BU	Obstetrical
BV	Obstetrical/Gynecological
BY	Physician Visit - Office: Sick
BZ	Physician Visit - Office: Well
C1	Coronary Care
CK	Screening X-ray
CL	Screening laboratory
CM	Mammogram, High Risk Patient
CN	Mammogram, Low Risk Patient
CO	Flu Vaccination
CP	Eyewear and Eyewear Accessories
CQ	Case Management
DG	Dermatology
DM	Durable Medical Equipment
DS	Diabetic Supplies
E0	Applied Behavioral Analysis Therapy
E1	Non-Medical Equipment (non DME)
E2	Psychiatric Emergency
E3	Step Down Unit
E4	Skilled Nursing Facility Head Level of Care
E5	Skilled Nursing Facility Ventilator Level of Care
E6	Level of Care 1
E7	Level of Care 2
E8	Level of Care 3
E9	Level of Care 4
E10	Radiographs
E11	Diagnostic Imaging

E14	Fixed Prosthodontics
E15	Removable Prosthodontics
E16	Intraoral Images - Complete Series
E17	Oral Evaluation
E18	Dental Prophylaxis
E19	Panoramic Images
E20	Sealants
E21	Fluoride Treatments
E22	Dental Implants
E23	Temporomandibular Joint Dysfunction
E24	Retail Pharmacy Prescription Drug
E25	Long Term Care Pharmacy
E26	Comprehensive Medication Therapy Management Review
E27	Targeted Medication Therapy Management Review
E28	Dietary/Nutritional Services
E33	Intensive Cardiac Rehabilitation
E36	Convenience Care
E37	Telemedicine
E38	Pharmacist Services
E39	Diabetic Education
E40	Early Intervention
EA	Preventive Services
EB	Specialty Pharmacy
EC	Durable Medical Equipment New
ED	CAT Scan
EE	Ophthalmology
EF	Contact Lenses
F1	Medical Coverage
F2	Social Work Coverage

F3	Dental Coverage
F4	Hearing Coverage
F5	Prescription Drug Coverage
F6	Vision Coverage
F7	Orthodontia Coverage
F8	Mental Health Coverage
GF	Generic RX Drug - Formulary
GN	Generic RX Drug - Non-Formulary
GY	Allergy
IC	Intensive Care
MH	Mental Health
NI	Neonatal Intensive Care
ON	Oncology
PE	Positron Emission Tomography PET Scan
PT	Physical Therapy
PU	Pulmonary
RN	Renal
RT	Residential Psychiatric Treatment
SMH	Serious Mental Health
TC	Transitional Care
TN	Transitional Nursery Care
UC	Urgent Care
10	Blood Charges
13	Ambulatory Service Center Facility
15	Alternate Method Dialysis
16	Chronic Renal Disease (CRD) Equipment
17	Pre-Admission Testing
18	Durable Medical Equipment Rental
20	Second Surgical Opinion

21	Third Surgical Opinion
23	Diagnostic Dental
25	Restorative
26	Endodontics
27	Maxillofacial Prosthetics
28	Adjunctive Dental Services
32	Plan Waiting Period
34	Chiropractic Office Visits
37	Dental Accident
38	Orthodontics
39	Prosthodontics
40	Oral Surgery
43	Home Health Prescriptions
44	Home Health Visits
45	Hospice
46	Respite Care
48	Hospital - Inpatient
50	Hospital - Outpatient
51	Hospital - Emergency Accident
52	Hospital - Emergency Medical
53	Hospital - Ambulatory Surgical
54	Long Term Care
55	Major Medical
56	Medically Related Transportation
57	Air Transportation
58	Cabulance
59	Licensed Ambulance
60	General Benefits
61	In-vitro Fertilization

63	Donor Procedures
64	Acupuncture
67	Smoking Cessation
7	Anesthesia
70	Transplants
71	Audiology Exam
72	Inhalation Therapy
74	Private Duty Nursing
75	Prosthetic Device
77	Otological Exam
8	Surgical Assistance
84	Abortion
85	AIDS
88	Pharmacy
89	Free Standing Prescription Drug
9	Other Medical
90	Mail Order Prescription Drug
91	Brand Name Prescription Drug
92	Generic Prescription Drug
94	Podiatry - Office Visits
95	Podiatry - Nursing Home Visits
96	Professional (Physician)
97	Anesthesiologist
99	Physician Visit - Inpatient
A0	Physician Visit - Outpatient
A1	Physician Visit - Nursing Home
A2	Physician Visit - SNF
A3	Physician Visit - Home
A5	Psychiatric - Room and Board

AA	Rehabilitation - Room and Board
AH	Skilled Nursing Care-Room & Board
AN	Routine Exam
AQ	Nonmedically Necessary Physical
AR	Experimental Drug Therapy
B1	Burn Care
B2	Brand Name RX Drug - Formulary
B3	Brand Name RX Drug - Non-Formulary
BA	Independent Medical Evaluation
BB	Partial Hospitalization (Psychiatric)
BC	Day Care (Psychiatric)
BD	Cognitive Therapy
BE	Massage Therapy
BF	Pulmonary Rehabilitation
BG	Cardiac Rehabilitation
BH	Pediatric
BI	Nursery
BJ	Skin
BR	Eye
BS	Invasive Procedures
BW	Mail Order RX Drug: Brand Name
BX	Mail Order RX Drug: Generic
CA	Private Duty Nursing - Inpatient
CB	Private Duty Nursing - Home
CC	Surgical Benefits - Professional
CD	Surgical Benefits - Facility
CE	Mental Health Provider - Inpatient
CF	Mental Health Provider - Outpatient
CG	Mental Health Facility - Inpatient

CH	Mental Health Facility - Outpatient
CI	Substance Abuse Facility - Inpatient
CJ	Substance Abuse Facility - Outpatient

Employment Status

Description	Value
FULL TIME	1
PART TIME	2
UNEMPLOYED	3
SELF EMPLOYED	4
RETIRED	5
ACTIVE MILITARY	6
RESERVED FOR NATIONAL	7
UNKNOWN	9

File Download Status Values

Description	Value
Not retrieved	0
Retrieved	1
Complete	2

Form Types

Description	Value
Gen. Demographics Templates	T
Collections	C
Referrals	R

HIPAA Relationship

Description	Value
18-(SELF)	18
01-Spouse	01
04-Grandfather or Grandmother	04
05-Grandson or Granddaughter	05
07-Nephew or Niece	07
09-Adopted Child	09
10-Foster Child	10
15-Ward	15
17-Stepson or Stepdaughter	17
19-Child	19
20-Employee	20
21-Unknown	21
22-Handicapped Dependent	22
23-Sponsored Dependent	23
24-Dependent of a Minor Dependent	24
29-Significant Other	29
32-Mother	32
33-Father	33
34-Other Adult	34
36-Emancipated Minor	36
39-Organ Donor	39
40-Cadaver Donor	40
41-Injured Plaintiff	41
43-Child Where Insured Has No Financial Responsibility	43

53-Life Partner	53
G8-Other Relationship	G8

Image Types

- Our Charts: 1
 - Labs: 1
 - Medications: 2
 - Nurse Notes: 4
 - Referrals: 5
 - Soap Notes: 6
 - Tests: 7
 - Vitals: 8
 - X-Rays: 9
- Outside Charts: 2
 - Labs: 10
 - Other Communications: 12
 - Tests: 13
 - X-Rays: 14
- Billing 3:
 - Archived EDI Reports: 15
 - Collections: 16
 - EOBs: 17
 - ERAs: 18
 - Insurance Cards: 19
 - Old Insurance Cards: 20
 - Patient Forms: 21
 - Unspecified: 22
- Patient Forms: 5
 - E-Patient Forms: 66
- Consent Forms: 6
 - E-Patient Forms: 52

Insurance

Description	Value
PRIMARY	1
SECONDARY	2
TERTIARY	3
WORKERS	4
AUTO	5
DME	6

Item Type

Description	Value
HealthWatcher	2
Appointment	3
Note	4
Rx	5
Order	6
Result	7
Document	9
Superbill	102

Languages

Language_UID	LanguageCode	LanguageCodeLong	LanguageDescription
1	ab	abk	Abkhazian
2	aa	aar	Afar
3	af	afr	Afrikaans
4	ak	aka	Akan
5	sq	alb	Albanian

6	am	amh	Amharic
7	ar	ara	Arabic
8	an	arg	Aragonese
9	hy	arm	Armenian
10	as	asm	Assamese
11	av	ava	Avaric
12	ae	ave	Avestan
13	ay	aym	Aymara
14	az	aze	Azerbaijani
15	bm	bam	Bambara
16	ba	bak	Bashkir
17	eu	baq	Basque
18	be	bel	Belarusian
19	bn	ben	Bengali
20	bh	bih	Bihari languages
21	bi	bis	Bislama
22	nb	nob	Bokmal, Norwegian
23	bs	bos	Bosnian
24	br	bre	Breton
25	bg	bul	Bulgarian
26	my	bur	Burmese
27	ca	cat	Catalan
28	km	khm	Central Khmer
29	ch	cha	Chamorro
30	ce	che	Chechen
31	ny	nya	Chichewa

32	zh	chi	Chinese
33	cu	chu	Church Slavic
34	cv	chv	Chuvash
35	kw	cor	Cornish
36	co	cos	Corsican
37	cr	cre	Cree
38	hr	hrv	Croatian
39	cs	cze	Czech
40	da	dan	Danish
41	dv	div	Divehi
42	nl	dut	Dutch
43	dz	dzo	Dzongkha
44	en	eng	English
45	eo	epo	Esperanto
46	et	est	Estonian
47	ee	ewe	Ewe
48	fo	fao	Faroese
49	fj	fij	Fijian
50	fi	fin	Finnish
51	fr	fre	French
52	ff	ful	Fulah
53	gd	gla	Gaelic
54	gl	glg	Galician
55	lg	lug	Ganda
56	ka	geo	Georgian
57	de	ger	German

58	el	gre	Greek, Modern (1453)
59	gn	grn	Guarani
60	gu	guj	Gujarati
61	ht	hat	Haitian
62	ha	hau	Hausa
63	he	heb	Hebrew
64	hz	her	Herero
65	hi	hin	Hindi
66	ho	hmo	Hiri Motu
67	hu	hun	Hungarian
68	is	ice	Icelandic
69	io	ido	Ido
70	ig	ibo	Igbo
71	id	ind	Indonesian
72	ia	ina	Interlingua
73	ie	ile	Interlingue
74	iu	iku	Inuktitut
75	ik	ipk	Inupiaq
76	ga	gle	Irish
77	it	ita	Italian
78	ja	jpn	Japanese
79	jv	jav	Javanese
80	kl	kal	Kalaallisut
81	kn	kan	Kannada
82	kr	kau	Kanuri

83	ks	kas	Kashmiri
84	kk	kaz	Kazakh
85	ki	kik	Kikuyu
86	rw	kin	Kinyarwanda
87	ky	kir	Kirghiz
88	kv	kom	Komi
89	kg	kon	Kongo
90	ko	kor	Korean
91	kj	kua	Kuanyama
92	ku	kur	Kurdish
93	lo	lao	Lao
94	la	lat	Latin
95	lv	lav	Latvian
96	li	lim	Limburgan
97	ln	lin	Lingala
98	lt	lit	Lithuanian
99	lu	lub	Luba-Katanga
100	lb	ltz	Luxembourgish
101	mk	mac	Macedonian
102	mg	mlg	Malagasy
103	ms	may	Malay
104	ml	mal	Malayalam
105	mt	mlt	Maltese
106	gv	glv	Manx
107	mi	mao	Maori
108	mr	mar	Marathi

109	mh	mah	Marshallese
110	mn	mon	Mongolian
111	na	nau	Nauru
112	nv	nav	Navajo
113	nd	nde	Ndebele, North
114	nr	nbl	Ndebele, South
115	ng	ndo	Ndonga
116	ne	nep	Nepali
117	se	sme	Northern Sami
118	no	nor	Norwegian
119	nn	nno	Norwegian Nynorsk
120	oc	oci	Occitan (post 1500)
121	oj	oji	Ojibwa
122	or	ori	Oriya
123	om	orm	Oromo
124	os	oss	Ossetian
125	pi	pli	Pali
126	pa	pan	Panjabi
127	fa	per	Persian
128	pl	pol	Polish
129	pt	por	Portuguese
130	ps	pus	Pushto
131	qu	que	Quechua
132	ro	rum	Romanian
133	rm	roh	Romansh
134	rn	run	Rundi

135	ru	rus	Russian
136	sm	smo	Samoan
137	sg	sag	Sango
138	sa	san	Sanskrit
139	sc	srd	Sardinian
140	sr	srp	Serbian
141	sn	sna	Shona
142	ii	iii	Sichuan Yi
143	sd	snd	Sindhi
144	si	sin	Sinhala
145	sk	slo	Slovak
146	sl	slv	Slovenian
147	so	som	Somali
148	st	sot	Sotho, Southern
149	es	spa	Spanish
150	su	sun	Sundanese
151	sw	swa	Swahili
152	ss	ssw	Swati
153	sv	swe	Swedish
154	tl	tgl	Tagalog
155	ty	tah	Tahitian
156	tg	tgk	Tajik
157	ta	tam	Tamil
158	tt	tat	Tatar
159	te	tel	Telugu
160	th	tha	Thai

161	bo	tib	Tibetan
162	ti	tir	Tigrinya
163	to	ton	Tonga (Tonga Islands)
164	ts	tso	Tsonga
165	tn	tsn	Tswana
166	tr	tur	Turkish
167	tk	tuk	Turkmen
168	tw	twi	Twi
169	ug	uig	Uighur
170	uk	ukr	Ukrainian
171	ur	urd	Urdu
172	uz	uzb	Uzbek
173	ve	ven	Venda
174	vi	vie	Vietnamese
175	vo	vol	Volapuk
176	wa	wln	Walloon
177	cy	wel	Welsh
178	fy	fry	Western Frisian
179	wo	wol	Wolof
180	xh	xho	Xhosa
181	yi	yid	Yiddish
182	yo	yor	Yoruba
183	za	zha	Zhuang
184	zu	zul	Zulu

Race

UID	Value	Name
235	1002-5	American Indian or Alaska Native
236	2028-9	Asian
237	2054-5	Black or African American
238	2076-8	Native Hawaiian or Other Pacific Islander
239	2106-3	White
240	2131-1	Other Race
241		Declined to Specify

Ethnicity

Description	Value
Hispanic or Latino	221
Not Hispanic or Latino	222
Unknown	223
Declined to Specify	224

EHR Note Field Types

Description	Value
Label	0
Textbox	1
DateTime	2
Checkbox	3
DropDown	4
Multiselect	5
Picture	6

Calculation	7
E&M Coder	8
Options Group	9
CPT Selector	10
Summarize Plan	11

EHR Type Ids

Description	Value
HEALTHWATCHER	2
APPOINTMENT	3
PATIENT_NOTE	4
PRESCRIPTION	5
LAB_ORDER	6
LAB_RESULT	7
DOC	9
DOCNEWSCAN	10
DOCNEWUPLOAD	11
CONSENTFORM	14
INTAKEFORM	15
PRESCRIPTION_BENEFIT	16
LAB_ORDER_LABEL	17
PATIENT_SUBNOTE	18
DOCNARRATIVE	19
PATIENT_ADV_DIR	21 '7/16/07PDG NewItemType
PATIENT_ALLERGY	22
PATIENT_PROBLEM	23
PATIENT_RISKFAC	24

Description	Value
PATIENT_HEALTHMAINT	25 '8/7/07ADC
PATIENT_CONFNOTE	25 '10/7/08ADC
PATIENT_FLOWSHEET	30
PATIENT_IMMUNIZE	31
PATIENT_SCHEDULE	32 '8/9/07PDG
PATIENT_MEDLIST	55
FLOW_INPUT	101
SUPERBILL	102
PRESCTEMPLATE	103
IMMUNIZATION	104
TOOL_BULK_UPLOAD	120 '7/16/07PDG NewItemsperSecurity/Privileges
TOOL_CHART_REASS	121
TOOL_ORDER_MANIF	122
TOOL_ORDER_ESEND	123
TOOL_CCR_IMP_EXP	124
TOOL_PATIENT_REP	125
TOOL_PROV_LOOKUP	126
TOOL_PRESC_ESEND	127
TOOL_PRESC_RENEW	128
TOOL_RESULT_LINK	129
TOOL_RESULT_UPLD	130
TOOL_RESULT_VIEW	131
TOOL_CIE_INBOUND	132
ADMIN_SYSTEM_SET	140 '7/16/07PDG NewItemsperSecurity/Privileges

Description	Value
ADMIN_NOTE_TEMPS	141
ADMIN_HEALTH_MNT	142
ADMIN_PRESCRIPTS	143
ADMIN_LAB_ORDERS	144
ADMIN_AUDIT_TRAC	145
ADMIN_USER_PREFERENCES	146
ADMIN_EDIT_INDV_USR_PREF	147

Marital Status

Description	Value
SINGLE	1
MARRIED	2
DIVORCED	3
LEGALLY SEPARATED	4
WIDOWED	5
UNKNOWN	6

Month

Description	Value
January	1
February	2
March	3
April	4
May	5

June	6
July	7
August	8
September	9
October	10
November	11
December	12

Patient Memos

Description	Value
Display	D
Hidden	H
Statement	S
Insurance	I
Consent	C

Payment Distribution

Description	Value
MANUAL	1
OLDEST TO NEWEST	2
EVEN CROSS	3

Place of Service (POS)

Description	Value
PHARMACY	01
TELEHEALTH PROVIDED OTHER THAN IN PATIENT'S HOME	02
SCHOOL	03

HOMELESS SHELTER	04
INDIAN HEALTH SERVICE FREE-STANDING FACILITY	05
INDIAN HEALTH SERVICE PROVIDER-BASED FACILITY	06
TRIBAL 638 FREE-STANDING FACILITY	07
TRIBAL 638 PROVIDER-BASED FACILITY	08
PRISON/CORRECTIONAL FACILITY	09
TELEHEALTH CORRECTIONAL FACILITY	10
OFFICE	11
HOME	12
ASSISTED LIVING FACILITY	13
GROUP HOME	14
MOBILE UNIT	15
TEMPORARY LODGING	16
WALK-IN RETAIL HEALTH CLINIC	17
PLACE OF EMPLOYMENT/WORKSITE	18
OUTPATIENT HOSPITAL - OFF CAMPUS	19
URGENT CARE FACILITY	20
INPATIENT HOSPITAL	21
OUTPATIENT HOSPITAL - ON CAMPUS	22
EMERGENCY ROOM - HOSPITAL	23
AMBULATORY SURGICAL CENTER	24
BIRTHING CENTER	25
MILITARY TREATMENT FACILITY	26
OUTREACH SITE/STREET	27
SKILLED NURSING FACILITY	31
NURSING FACILITY	32

CUSTODIAL CARE FACILITY	33
HOSPICE	34
AMBULANCE - LAND	41
AMBULANCE AIR OR WATER	42
INDEPENDENT CLINIC	49
FEDERALLY QUALIFIED HEALTH CENTER	50
INPATIENT PSYCHIATRIC FACILITY	51
PSYCHIATRIC FACILITY PARTIAL HOSPITALIZATION	52
COMMUNITY MENTAL HEALTH CENTER	53
INTERMEDIATE CARE FACILITY/MENTALLY RETARDED	54
RESIDENTIAL SUBSTANCE ABUSE TREATMENT FACILITY	55
PSYCHIATRIC RESIDENTIAL TREATMENT CENTER	56
NON-RESIDENTIAL SUBSTANCE ABUSE TREATMENT FACILITY	57
NON-RESIDENTIAL OPIOD TREATMENT FACILITY	58
MASS IMMUNIZATION CENTER	60
COMPREHENSIVE INPATIENT REHABILITATION FACILITY	61
COMPREHENSIVE OUTPATIENT REHABILITATION FACILITY	62
END STAGE RENAL DISEASE TREATMENT FACILITY	65
PUBLIC HEALTH CLINIC	71
RURAL HEALTH CLINIC	72
INDEPENDENT LABORATORY	81
OTHER PLACE OF SERVICE	99

Payment Source

Description	Value
Patient	1

Insurance	2
Unapplied Patient	3
Unapplied Insurance	4
Repost Patient	5
Repost Insurance	6

Payment Status

Description	Value
Bill Next	B
Transfer	T
Rebill	R
Denied	D
Ded. Not Met	X
Crossover	C
Hold	H
Hold-Allowed	A
Unapplied	U
Patient	P

Payment Type

Description	Value
CASH	1
CHECK	2
VISA	3
MASTER CARD	4
DISCOVER	5
AMERICAN EXPRESS	6

OTHER CARD	7
OTHER	8
ERA-ACH	9
ERA-NON	10
ERA-CHK	11
ERA-FWT	12
ERA-BOP	13
ERA-Other	14
ACH/EFT	15
FWT	16
BOP	17

Phone

Description	Value
CELL	C
PAGER	P
FAX	F
MAIN	M
WORK	W
OTHER	O

Preferred Phone Contact

Description	Value
HOME	1
WORK	2
OTHER	3

Referral Type

Description	Value
Inbound	I
Outbound	O
Marketing	M

Relationship to Responsible Party

Description	Value
SELF	1
SPOUSE	2
CHILD	3
OTHER	4

Sex

Description	Value
Male	M
Female	F
Unknown	U

Student Status - Insurance Tab

Description	Value
	NULL
Part Time	0
Full Time	1

Transcription Status

Description	Value
ALL	A
NEW	N
RECEIVED	R
IN PROGRESS	I
PROOF	P
COMPLETE	C
CLOSED	X

Type of Service (TOS)

Description	Value
MEDICAL CARE	01
SURGERY	02
CONSULTATION	03
DIAGNOSTIC. X-RAY	04
DIAGNOSTIC LABORATORY	05
RADIATION THERAPY	06
ANESTHESIA	07
SURGICAL ASSISTANCE	08
OTHER MEDICAL	09
BLOOD CHARGES	10
USED DME	11
DME PURCHASE	12
ASC FACILITY	13
RENAL SUPPLIES IN THE HOME	14

ALTERNATE METHOD DIALYSIS	15
CRD EQUIPMENT	16
PRE-ADMISSION TESTING	17
DME RENTAL	18
PNEUMONIA VACCINE	19
SECOND SURGICAL OPINION	20
THIRD SURGICAL OPINION	21

Upload File Group List

ID	FILEGROUP FID	CODE	NAME	filetype	level	default
1	1	OCLAB S	Labs	0	0	0
2	1	OCMED S	Medications	0	0	0
3	1	OCMIS C	Miscellaneous	0	0	0
4	1	OCNNO T	Nurse Notes	0	0	0
5	1	OCREF S	Referrals	0	0	0
6	1	OCSOA P	Soap Notes	0	0	0
7	1	OCTES T	Tests	0	0	0
8	1	OCVTL S	Vitals	0	0	0
9	1	OCXRA Y	X-rays	0	0	0
10	2	OTLAB	Labs	0	0	0

		S				
11	2	OTMIS C	Miscellaneous	0	0	0
12	2	OTCOM M	Other Communicat ions	0	0	0
13	2	OTTES T	Tests	0	0	0
14	2	OTXRA Y	X-rays	0	0	0
15	3	BICOLL	Collections	0	0	0
16	3	BICON S	Consent	0	0	0
17	3	BIEOBS	EOBs	0	0	0
18	3	BIERAS	ERAs	0	0	0
19	3	BININS	Insurance Cards	0	0	0
20	3	BIOINS	Old Insurance Cards	0	0	0
21	3	BIPFRM	Patient Forms	0	0	0
22	3	BIUNSP	Unspecified	0	0	0
23	4	MIOTH E	Other ID	0	0	0
24	4	MIPPH O	Patient Photo	0	0	0
25	4	MIUNS P	Unspecified	0	0	0

Week Frequency of Block/Hold

Description	Value
First	1
Second	2
Third	3
Fourth	4
Fifth	5
Last	6

File Chart XML message specification

Date	Modifier	Description
05/23/2005	Travis DeAngelis	Created
03/09/2006	Al Anderson	Added I to filetype Description
07/31/2006	Travis DeAngelis	Added "updatedlist" definition to "uploadfile" response definitions.

Copyfile Message Specification

"Copyfile" Action Message Entity Layout

<ppmdmsg />

Note: The "copyfile" returns the same results as the "uploadfile" action with the results of the copy operation.

"Copyfile" Action Message XML Schema Entity Definition

Element Name: ppmdmsg

Description

This is the root element; it describes the action and class that will handle the message. If you are copying a file on the AdvancedMD servers you at minimum need to specify an action, class, and sourceid. If you are copying a file on the local servers you need to specify an action, class, sourceid, filename, and filelocation. The name and description are optional and if not specified will match the original file information. For server files if you pass in a filename and filelocation they will be ignored.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"copyfile"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.
sourceid	string	Yes	""	The id of the file to copy
name	string	No	""	The display name for the new file, if not specified will

				default to the previous files display name
description	string	No	""	The description of the new file, if not specified will default to the previous files description.
filename	string	Yes/No	""	The new file name. Not required if the file is stored on the AdvancedMD servers. Required if you are copying a local file.
filelocation	string	Yes/No	""	The new files location. Not required if the file is stored on the AdvancedMD servers. Required if you are copying a local file.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<ppmdmsg action="copyfile" class="files" sourceid="3" />
```

Deletefile Message Specification

"Deletefile" Action Message Entity Layout

```
<ppmdmsg />
```

"Deletefile" Action Message XML Schema Entity Definition

Element Name: ppmormsg

Description

This is the root element; it describes the action and class that will handle the message.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"deletefile"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.
fileid	int	Yes	n/a	The file id to delete

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<ppmdmsg action="deletefile" class="files" fileid="3" />
```


"Deletefile" Action Response Entity Layout

```
<PPMResults>
  <Results/>
  <Error>
    <Fault>
      <faultcode/>
      <faultstring/>
      <detail>
        <code/>
        <description/>
        <class/>
        <method/>
        <linenumber/>
        <source/>
        <extrainfo/>
      </detail>
    </Fault>
  </Error>
</PPMResults>
```

"Deletefile" Action Response XML Schema Entity Definition

Element Name: PPMResults

Description

This is the root element; it may or may not contain a "Results" element and will have a "Fault" element that will be empty if there were no errors to report.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
--------------	----------------	----------------

Results	0	1
Error	0	1

Example

```

<PPMDResults>
  <Results/>
  <Error/>
</PPMDResults>

```

Element Name: Results

Description

This element contains the results of the action. This element will only be here if the action was a success. If there was a failure the success flag will be missing and the "Error" element will be populated.

Attributes

Attribute Name	Data Type	Description
success	boolean	The success flag will be true if the delete was successful.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```

<Results success="true" /

```

Element Name: Error**Description**

For the description of this element and all of its children see the "uploadfile" action response element definition.

Getdiskusage Message Specification

"Getdiskusage" Action Message Entity Layout

```
<ppmdmsg />
```

"Getdiskusage" Action Message XML Schema Entity Definition

Element Name: ppmdmsg

Description

This is the root element; it describes the action and class that will handle the message.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"getdiskusage"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<ppmdmsg action="getdiskusage" class="files" />
```

"Getdiskusage" Action Response Entity Layout

```
<PPMDResults>
  <Results>
    <folderlist>
      <folder>
        <folder/>
      </folder>
    </folderlist>
  </Results>
  <Error>
    <Fault>
      <faultcode/>
      <faultstring/>
      <detail>
        <code/>
        <description/>
        <class/>
        <method/>
        <linenumber/>
        <source/>
        <extrainfo/>
      </detail>
    </Fault>
  </Error>
</PPMDResults>
```

"Getdiskusage" Action Response XML Schema Entity Definition

Element Name: PPMDResults

Description

This is the root element; if there is not a "Results" element there will be an "Error" element. There may be an "Error" element included with a "Results" element but it will be empty unless an error occurred.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
Results	0	1
Error	0	1

Example

```
<PPMDResults>  
  <Results/>  
  <Error/>  
</PPMDResults>
```

Element Name: Results

Description

This element contains the results of the action. This element will only be here if the action was a success. If there was a failure the success flag will be missing and the "Error" element will be populated.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
folderlist	1	1

Example

```
<Results>  
  <folderlist/>  
</Results>
```

Element Name: folderlist

Description

This element contains the information about the folders and files for the office key.

Attributes

Attribute Name	Data Type	Description
size	int	The size (in bytes) of the files contained in this folder.
sizemb	string	The size (in megabytes) of the files contained in this folder.
totalsize	int	The size (in bytes) of all the files in this folder and all sub folders.
totalsizemb	string	The size (in megabytes) of all the files in this folder and all sub folders.
count	int	The count of files in this folder.
countformatted	string	The formatted count of files in this folder.
totalcount	int	The count of files in this folder and all sub folders.
totalcountformatted	string	The formatted count of files in this folder and all sub folders.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
folder	0	Unlimited

Example

```
<folderlist>  
  <folder/>  
</folderlist>
```

Element Name: folder

Description

This element contains the information about the folder and contains any child folders that may exist.

Attributes

Attribute Name	Data Type	Description
name	string	The name of this folder.
size	int	The size (in bytes) of the files contained in this folder.
sizemb	string	The size (in megabytes) of the files contained in this folder.
totalsize	int	The size (in bytes) of all the files in this folder and all sub folders.
totalsizemb	string	The size (in megabytes) of all the files in this folder and all sub folders.
count	int	The count of files in this folder.
countformatted	string	The formatted count of files in this folder.
totalcount	int	The count of files in this folder and all

		sub folders.
totalcountformatted	string	The formatted count of files in this folder and all sub folders.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
folder	0	Unlimited

Example

```

<folderlist>
  <folder/>
</folderlist>

```

Element Name: Error

Description

For the description of this element and all of its children see the "uploadfile" action response element definition.

Getfile Message Specification

"Getfile" Action Message Entity Layout

<ppmdmsg/>

"Getfile" Action Message XML Schema Entity Definition

Element Name: ppmdmsg

Description

This is the root element; it describes the action and class that will handle the message. This message is only valid for files that are stored on the AdvancedMD servers. If you try submitting this message for a file that is stored on the local servers an error message will be returned.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"getfile"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.
fileid	int	Yes	FileID	The file id to retrieve from the server

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<ppmdmsg action="getfile" class="files" fileid="4"/>
```

"getfile" Action Response Entity Layout

```
<PPMResults>
  <Results/>
  <Error>
    <Fault>
      <faultcode/>
      <faultstring/>
      <detail>
        <code/>
        <description/>
        <class/>
        <method/>
        <linenumber/>
        <source/>
        <extrainfo/>
      </detail>
    </Fault>
  </Error>
</PPMResults>
```

"Getfile" Action Response XML Schema Entity Definition

Element Name: PPMResults

Description

This is the root element; if there is not a "Results" element there will be an "Error" element. There may be an "Error" element included with a "Results" element but it will be empty unless an error occurred.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
--------------	----------------	----------------

Results	0	1
Error	0	1

Example

```

<PPMResults>
  <Results/>
  <Error/>
</PPMResults>

```

Element Name: Results

Description

This element contains the results of the action; it contains the base 64 encoded data of the file.

Attributes

Attribute Name	Data Type	Description
filename	string	The name of the file that should be used when creating this file.
fileext	string	The extension that should be used when creating this file.
zipmode	unsignedByte	<p>The zip mode may be one of the following values:</p> <ul style="list-style-type: none"> • "0" = The file contents are uncompressed • "2" = The file contents are zipped

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<Results filename="000001-2034-0000" fileext="doc" zipmode="2">[Base 64  
encoded file data]</Results>
```

Element Name: Error

Description

For the description of this element and all of its children see the "uploadfile" action response element definition.

Getfilelist Message Specification

"Getfilelist" Action Message Entity Layout

```
<ppmdmsg>
  <filelist>
    <file/>
  </filelist>
  <categorylist>
    <category/>
  </categorylist>
  <typelist>
    <type/>
  </typelist>
</ppmdmsg>
```

Note: The "getfilelist" returns the same results as the "uploadfile" action.

"Getfilelist" Action Message XML Schema Entity Definition

Element Name: ppmdmsg

Description

This is the root element; it describes the action and class that will handle the message.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"getfilelist"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.

filetype	string [1]	No	""	<p>The file type to search for. This must be one of the following values:</p> <ul style="list-style-type: none"> • "A" = Audio files • "D" = Word documents • "F" = Other files • "I" = Images
patientid	int	No	null	The patient id to search for
resourceid	int	No	null	The resource id to search for
profileid	int	No	null	The provider billing profile id to search for
visited	int	No	null	The visit id to search for
facilityid	int	No	null	The facility id to search for
referringproviderid	int	No	null	The referring provider id to search for

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
filelist	0	1
categorylist	0	1
typelist	0	1

Example

```
<ppmdmsg action="getfilelist" class="files" filetype="D">  
  <filelist/>  
  <categorylist/>  
  <typelist/>  
</ppmdmsg>
```

Element Name: filelist

Description

This is the element contains 1 or more file elements.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
file	1	Unlimited

Example:

```
<filelist>
  <file/>
</filelist>
```

Element Name: file**Description**

This element lists the file ids that you wish to have the details returned for.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
id	int	Yes	n/a	The file id being searched for

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<file id="4" />
```

Element Name: categorylist**Description**

This is the element contains 1 or more category elements.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
----------------	-----------	----------	---------------	-------------

No attributes defined.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
category	1	Unlimited

Example

```
<categorylist>
  <category/>
</categorylist>
```

Element Name: category

Description

This element lists the category ids that you wish to have the details returned for.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
id	int	Yes	n/a	The category id being searched for

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<category id="4" />
```

Element Name: typelist**Description**

This is the element contains 1 or more type elements.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
type	1	Unlimited

Example

```
<typelist>  
  <type/>  
</typelist>
```

Element Name: type**Description**

This element lists the type ids that you wish to have the details returned for.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
id	char[1]	Yes	n/a	The file type id being searched for

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<type id="F" />
```

Getrevision Message Specification

"Getrevision" Action Message Entity Layout

<ppmdmsg/>

"Getrevision" Action Message XML Schema Entity Definition

Element Name: ppmddmsg

Description

This is the root element; it describes the action and class that will handle the message. This message is only valid for files that are stored on the AdvancedMD servers. If you try submitting this message for a file that is stored on the local servers an error message will be returned.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"getrevision"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.
revisionid	int	Yes	RevisionID	The revision id to retrieve from the server

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<ppmdmsg action="getrevision" class="files" revisionid="4" />
```

"Getrevision" Action Response Entity Layout

```
<PPMDResults>
  <Results/>
  <Error>
    <Fault>
      <faultcode/>
      <faultstring/>
      <detail>
        <code/>
        <description/>
        <class/>
        <method/>
        <linenumber/>
        <source/>
        <extrainfo/>
      </detail>
    </Fault>
  </Error>
</PPMDResults>
```

"Getrevision" Action Response XML Schema Entity Definition

Element Name: PPMDResults

Description

This is the root element; if there is not a "Results" element there will be an "Error" element. There may be an "Error" element included with a "Results" element but it will be empty unless an error occurred.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
Results	0	1
Error	0	1

Example

```
<PPMDResults>  
  <Results/>  
  <Error/>  
</PPMDResults>
```

Element Name: Results

Description

This element contains the results of the action; it contains the base 64 encoded data of the file.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<Results>[Base 64 encoded file data]</Results>
```

Element Name: Error

Description

For the description of this element and all of its children see the "uploadfile" action response element definition.

Getrevisionlist Message Specification

"Getrevisionlist" Action Message Entity Layout

<ppmdmsg/>

"Getrevisionlist" Action Message XML Schema Entity Definition

Element Name: ppmdmsg

Description

This is the root element; it describes the action and class that will handle the message.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"getrevisionlist"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.
fileid	int	Yes	n/a	The file id to retrieve the revision list for.
revision	int	No	null	The specific revision to get information for

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<ppmdmsg action="getrevisionlist" class="files" fileid="234" />
```

"Getrevisionlist" Action Response Entity Layout:

```
<PPMDResults>
  <Results>
    <revisionlist>
      <revision/>
    </revisionlist>
  </Results>
  <Error>
    <Fault>
      <faultcode/>
      <faultstring/>
      <detail>
        <code/>
        <description/>
        <class/>
        <method/>
        <linenumber/>
        <source/>
        <extrainfo/>
      </detail>
    </Fault>
  </Error>
</PPMDResults>
```

"Getrevisionlist" Action Response XML Schema Entity Definition

Element Name: PPMResults

Description

This is the root element; if there is not a "Results" element there will be an "Error" element. There may be an "Error" element included with a "Results" element but it will be empty unless an error occurred.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
Results	0	1
Error	0	1

Example

```
<PPMResults>  
  <Results/>  
  <Error/>  
</PPMResults>
```

Element Name: Results

Description

This element contains the results of the action; it contains the revision list retrieved from the database.

Attributes

Attribute Name	Data Type	Description
----------------	-----------	-------------

No attributes defined.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
revisionlist	1	1

Example

```
<Results>  
  <revisionlist/>  
</Results>
```

Element Name: revisionlist

Description

This element contains list of revisions associated with the file in the database.
This element will not exist if there are no revisions.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
revision	1	Unlimited

Example

```
<revisionlist>  
  <revision/>  
</revisionlist>
```

Element Name: revision**Description**

This element contains the information about the revision.

Attributes

Attribute Name	Data Type	Description
id	int	The id of the revision
revision	int	The revision number of this file.
name	string	The display name for the file
description	string	The description of the file
filename	string	The file name of this revision.
filelocation	string	The file location of this revision.
filesize	int	The size of the file.
comments	string	The comments about the revision.
createdby	string	The user who initially created this revision
createdat	datetime	The date the revision was initially created
changedby	string	The user who changed the revision last.
changedat	datetime	The date and time the revision was changed.
printedby	string	The user who printed the revision last.
printedat	datetime	The date and time the revision was last printed.
reviewedby	string	The user who reviewed the revision.
reviewedat	datetime	The date and time the revision was reviewed.

approvedby	string	The user who approved the revision.
approvedat	datetime	The date and time the revision was approved.
lockedby	string	The user who locked the revision.
lockedat	datetime	The date and time the revision was locked.
countchars	int	The count of characters in this revision.
countcharswspaces	int	The count of characters with spaces in this revision.
countwords	int	The count of words in this revision.
countlines	int	The count of lines in this revision.
countparas	int	The count of paragraphs in this revision.
countpages	int	The count of pages in this revision.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<revision id="4" name="JJSouthSOAPNotes" description="Soap notes for
JJSouth"
filename="994223-3-000.DOC" filelocation="docs\" filesize="100234"
comments="" createdby="PPMD_TRAVIS" createdat="2005-04-05T14:34:02.325"
changedby="PPMD_TRAVIS" changedat="2005-04-05T14:36:00.817"
printedby=""
printedat="" reviewedby="" reviewedat="" approvedby="" approvedat=""
lockedby="" lockedat="" countchars="9" countcharswspaces="9"
countwords="2" countlines="2" countparas="1" countpages="1" />
```

Element Name: Error**Description:**

For the description of this element and all of its children see the "uploadfile" action response element definition.

Revisefile Message Specification

"Revisefile" Action Message Entity Layout

```
<ppmdmsg>
  <file>
    <filecontents/>
    <categorylist>
      <category/>
    </categorylist>
    <docinfo/>
  </file>
</ppmdmsg>
```

Note: The "revisefile" returns the same results as the "uploadfile" action with the results of the revision operation.

"Revisefile" Action Message XML Schema Entity Definition

Element Name: ppmddmsg

Description

This is the root element; it describes the action and class that will handle the message. This action will only work on files that have been "locked" if a file is not locked an error will be thrown.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"revisefile"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
file	1	1

Example

```
<ppmdmsg action="revisefile" class="files">  
  <file/>  
</ppmdmsg>
```

Element Name: file

Description

This element contains a number of child elements that describe the file in more detail. If the file is a word document you should include a "docinfo" element. If the file is being stored on the server you should include a "filecontents" element. If the file is categorized you should include the "categorylist" element. You should only include the values that are being changed.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
id	int	Yes	n/a	The file id of the file being revised.
name	string [50]	No	null	The display name for the file
description	string [255]	No	null	A short description of the file
filename	string [100]	Yes/No	null	The actual file name or not passed if the

				file is stored on the AMDS servers. If this element is passed and the file is stored on the AMDS servers this attribute will be ignored.
filelocation	string [255]	Yes/No	null	The UNC path to the file or not passed if the file is stored on the AMDS servers. If this element is passed and the file is stored on the AMDS servers this attribute will be ignored.
filesize	int	No	null	The size of the file in bytes.
comments	string [255]	No	null	Any comments about why the document is being revised.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
filecontents	0	1
categorylist	0	1
docinfo	0	1

Example

```
<file id="205" name="JJonesSOAP" description="SOAP notes for J.Jones"
  filesize="47232">
  <filecontents />
  <categorylist />
  <docinfo />
</file>
```

Element Name: filecontents

Description

This element contains the file information in a base 64 encoded format. If the binary is not stored on the AdvancedMD servers you should not include this element.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<filecontents>
  [base 64 encoded file contents]
</filecontents>
```

Element Name: categorylist**Description**

This element contains 1 or more category elements describing the category that the file belongs to. If you are not updating the categories for this file you should not specify this element. If this element is found in the message then all existing categories will be deleted and the values in the category list will be inserted in their place.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
category	1	Unlimited

Example

```
<categorylist>
  <category/>
</categorylist>
```

Element Name: category**Description**

This element describes an individual category for the file.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
id	int	yes	N/A	The id for category that the

				file belongs to
--	--	--	--	-----------------

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<category id="57" />
```

Element Name: docinfo

Description

This element represents the constructor of the class that is being instantiated. This element is only required for word documents (files with the filetype of "D"). Only elements that are being changed should be sent in the message.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
countchars	int	No	n/a	The count of characters in this document (excluding spaces)
countcharswspaces	int	No	n/a	The count of characters in this document (including spaces)
countwords	int	No	n/a	The count of words in this document
countlines	int	No	n/a	The count of

				lines in this document
countparas	int	No	n/a	The count of paragraphs in this document
countpages	int	No	n/a	The count of pages in this document

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<docinfo countchars="234" countcharswspaces="267" countwords="133"
countlines="12" countparas="2" countpages="1" templatedescription="SOAP
Notes" />
```

Rollbackrevision Message Specification

"Rollbackrevision" Action Message Entity Layout

<ppmdmsg/>

Note: The "rollbackrevision" returns the same results as the "uploadfile" action.

"Rollbackrevision" Action Message XML Schema Entity Definition

Element Name: ppmddmsg

Description

This is the root element; it describes the action and class that will handle the message. This message is only valid for files that are stored on the AdvancedMD servers. If you try submitting this message for a file that is stored on the local servers an error message will be returned. If you try submitting this message for a file that is locked or is the only version (no revisions made) an error message will be returned.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"rollbackrevision"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.
fileid	int	Yes	fileid	The file id to rollback to

				the last locked revision of.
--	--	--	--	------------------------------------

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<ppmdmsg action="rollbackrevision" class="files" fileid="4" />
```


Updatefile Message Specification

"Updatefile" Action Message Entity Layout

```
<ppmdmsg>
  <file>
    <filecontents/>
    <categorylist>
      <category/>
    </categorylist>
    <docinfo/>
  </file>
</ppmdmsg>
```

Note: The "updatefile" returns the same results as the "uploadfile" action with the results of the update operation.

"Updatefile" Action Message XML Schema Entity Definition

Element Name: ppmddmsg

Description

This is the root element; it describes the action and class that will handle the message.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"updatefile"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
file	1	1

Example

```
<ppmdmsg action="updatefile" class="files">  
  <file/>  
</ppmdmsg>
```

Element Name: file

Description

This element contains a number of child elements that describe the file in more detail. If the file is a word document you should include a "docinfo" element. If the file is being stored on the server you should include a "filecontents" element. If the file is categorized you should include the "categorylist" element. You should only include the values that are being changed.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
id	int	Yes	n/a	The file id of the file being updated.
name	string [50]	No	null	The display name for the file
description	string [255]	No	null	A short description of the file
filename	string [100]	No	null	The actual file name
filelocation	string [255]	No	null	The UNC path to the file

fileext	string [10]	No	null	The extension for the file.
filesize	int	No	null	The size of the file in bytes.
patientid	int	No	null	The id for the patient associated with this file
profileid	int	No	null	The providers profile id associated with this file
visited	int	No	null	The appointment visit id associated with this file
facilityid	int	No	null	The facility id associated with this file
referringprovide rid	int	No	null	The referring provider id associated with this file
dos	datetime	No	null	The date of service for this file. Must be between 01/01/1900 and 06/06/2079. The time may be included but is only stored down to the minute level.
zipmode	unsignedBy	No	null	The zip mode

	te			<p>may be one of the following values:</p> <ul style="list-style-type: none"> • "0" = The file contents are uncompressed • "2" = The file contents are zipped
printed	boolean	No	null	Sets the flag for the document being printed or not.
reviewed	boolean	No	null	Sets the flag for the document being reviewed or not.
approved	boolean	No	null	Sets the flag for the document being approved or not.
locked	boolean	No	null	Sets the flag for the document being locked or not.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
filecontents	0	1

categorylist	0	1
docinfo	0	1

Example

```

<file id="205" name="JJonesSOAP.doc" description="SOAP notes for
J.Jones"
fileext="doc" filesize="47232" patientid="99324" zipmode="2" >
  <filecontents />
  <categorylist />
  <docinfo />
</file>

```

Element Name: filecontents

Description

This element contains the file information in a base 64 encoded format. If the binary is not stored on the AdvancedMD servers or is not being updated you should not include this element.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```

<filecontents>
[base 64 encoded file contents]

```

</filecontents>

Element Name: categorylist

Description

This element contains 1 or more category elements describing the category that the file belongs to. If you are not updating the categories for this file you should not specify this element. If this element is found in the message then all existing categories will be deleted and the values in the category list will be inserted in their place.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements:

Element Name	Minimum Occurs	Maximum Occurs
category	1	Unlimited

Example

```
<categorylist>
  <category/>
</categorylist>
```

Element Name: category

Description

This element describes an individual category for the file.

Attributes

Attribute	Data	Required	Default	Description
-----------	------	----------	---------	-------------

Name	Type		Value	
id	int	yes	N/A	The id for category that the file belongs to

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<category id="57" />
```

Element Name: docinfo

Description

This element represents the constructor of the class that is being instantiated. This element is only required for word documents (files with the filetype of "D"). Only elements that are being changed should be sent in the message.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
resourceid	int	No	null	The audio resource id associated with this document
countchars	int	No	n/a	The count of characters in this document (excluding spaces)

countcharswspaces	int	No	n/a	The count of characters in this document (including spaces)
countwords	int	No	n/a	The count of words in this document
countlines	int	No	n/a	The count of lines in this document
countparas	int	No	n/a	The count of paragraphs in this document
countpages	int	No	n/a	The count of pages in this document
templatedescription	string [255]	No	null	The description of the template that this document is based on.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<docinfo countchars="234" countcharswspaces="267" countwords="133"
countlines="12" countparas="2"
countpages="1" templatedescription="SOAP Notes" />
```


Updatefilestatus Message Specification

"Updatefilestatus" Action Message Entity Layout

```
<ppmdmsg>
  <filelist>
    <file/>
  </filelist>
</ppmdmsg>
```

***Note:** The "updatefilestatus" returns the same results as the "uploadfile" action with the results of the update operation(s).*

"Updatefilestatus" Action Message XML Schema Entity Definition

Element Name: ppmddmsg

Description

This is the root element; it describes the action and class that will handle the message.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"updatefilestatus"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
filelist	1	1

Example

```
<ppmdmsg action="updatefilestatus" class="files">  
  <filelist/>  
</ppmdmsg>
```

Element Name: filelist

Description

This is the element contains 1 or more file elements.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
file	1	Unlimited

Example

```
<filelist>  
  <file/>  
</filelist>
```

Element Name: file**Description**

This element lists the file ids that you wish to have the status updated for. If a particular status flag is not being updated then do not pass that value in the message.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
id	int	Yes	n/a	The file id being updated
printed	boolean	No	null	true = this file is being flagged as printed, false = this file is being flagged as not printed.
reviewed	boolean	No	null	true = this file is being flagged as reviewed, false = this file is being flagged as not reviewed.
approved	boolean	No	null	true = this file is being flagged as approved, false = this file is being flagged as not approved.
locked	boolean	No	null	true = this file is being flagged as locked, false = this file is being flagged

				as not locked.
--	--	--	--	----------------

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<file id="4" />
```

Uploadfile Message Specification

"Uploadfile" Action Message Entity Layout

```
<ppmdmsg>
  <file>
    <filecontents/>
    <categorylist>
      <category/>
    </categorylist>
    <docinfo/>
  </file>
</ppmdmsg>
```

"Uploadfile" Action Message XML Schema Entity Definition

Element Name: ppmddmsg

Description

This is the root element; it describes the action and class that will handle the body of the message.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"uploadfile"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
file	1	1

Example

```
<ppmdmsg action="uploadfile" class="files" >  
  <file/>  
</ppmdmsg>
```

Element Name: file

Description

This element contains a number of child elements that describe the file in more detail. If the file is a word document you should include a "docinfo" element. If the file is being stored on the server you should include a "filecontents" element. If the file is categorized you should include the "categorylist" element.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
name	string [50]	Yes	n/a	The display name for the file Character limit of 50.
description	string [255]	Yes	n/a	A short description of the file
filename	string [100]	Yes/No	""	The actual file name, this element is not required if the file is being stored on the AdvancedMD servers.
filelocation	string [255]	Yes/No	""	The UNC path to the file. This field is not required if

				the file is being stored on the AdvancedMD servers.
filetype	string [1]	Yes	n/a	<p>The file type must be one of the following values:</p> <ul style="list-style-type: none"> • "A" = Audio files • "D" = Word documents • "F" = Other files • "I" = Images
fileext	string [10]	No	null	The extension for the file.
filesize	int	No	null	The size of the file in bytes (before compression and encoding)
patientid	int	Yes	null	The id for the patient associated with this file
profileid	int	No	null	The providers profile id associated with this file

visited	int	No	null	The appointment visit id associated with this file
facilityid	int	No	null	The facility id associated with this file
referringproviderid	int	No	null	The referring provider id associated with this file
dos	datetime	No	null	The date of service for this file. Must be between 01/01/1900 and 06/06/2079. The time may be included but is only stored down to the minute level.
zipmode	unsignedByte	Yes	n/a	<p>The zip mode may be one of the following values:</p> <ul style="list-style-type: none"> • "0" = The file contents are uncompressed • "2" = The file contents

				are zipped
--	--	--	--	------------

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
filecontents	0	1
categorylist	0	1
docinfo	0	1

Example

```

<file name="JJonesSOAP.doc" description="SOAP notes for J.Jones"
  filetype="D"
    fileext="doc" filesize="47232" patientid="99324" zipmode="2">
      <filecontents />
      <categorylist />
      <docinfo />
    </file>

```

Element Name: filecontents

Description

This element contains the file information in a base 64 encoded format. This element is only required when the file is stored on the AdvancedMD servers.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<filecontents>
[base 64 encoded file contents]
</filecontents>
```

Element Name: categorylist

Description

This element contains 1 or more category elements describing the category that the file belongs to. This element is only required when you want to have the file assigned to one or more categories.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
category	1	Unlimited

Example

```
<categorylist>
  <category/>
</categorylist>
```

Element Name: category

Description

This element describes an individual category for the file.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
id	int	yes	N/A	The id for category that the file belongs to

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<category id="57" />
```

Element Name: docinfo

Description

This element represents the constructor of the class that is being instantiated. This element is only required if you are storing a word document (file element and filetype attribute of "D").

Attributes

Attribute Name	Data Type	Required	Default Value	Description
resourceid	int	No	null	The audio resource id associated with this document.
countchars	int	Yes	n/a	The count of characters in this document

				(excluding spaces).
countcharswspaces	int	Yes	n/a	The count of characters in this document (including spaces).
countwords	int	Yes	n/a	The count of words in this document.
countlines	int	Yes	n/a	The count of lines in this document.
countparas	int	Yes	n/a	The count of paragraphs in this document.
countpages	int	Yes	n/a	The count of pages in this document.
templatedescription	string [255]	No	null	The description of the template that this document is based on.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<docinfo countchars="234" countcharswspaces="267" countwords="133"
countlines="12"
countparas="2" countpages="1" templatedescription="SOAP Notes" />
```

"Uploadfile" Action Response Entity Layout

```
<PPMDResults>
  <Results>
    <filelist>
      <file>
        <docinfo/>
        <categorylist>
          <category/>
        </categorylist>
        <revisionlist>
          <revision/>
        </revisionlist>
      </file>
    </filelist>
    <updatedlist>
      <file>
        <docinfo/>
        <categorylist>
          <category/>
        </categorylist>
        <revisionlist>
          <revision/>
        </revisionlist>
      </file>
    </updatedlist>
  </Results>
  <Error>
    <Fault>
      <faultcode/>
```

```

        <faultstring/>
        <detail>
            <code/>
            <description/>
            <class/>
            <method/>
            <linenumber/>
            <source/>
            <extrainfo/>
        </detail>
    </Fault>
</Error>
</PPMDResults>

```

"Uploadfile" Action Response XML Schema Entity Definition

Element Name: PPMDResults

Description

This is the root element; if there is not a "Results" element there will be an "Error" element. There may be an "Error" element included with a "Results" element but it will be empty unless an error occurred.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
Results	0	1
Error	0	1

Example

```
<PPMDResults>
  <Results/>
  <Error/>
</PPMDResults>
```

Element Name: Results

Description

This element contains the results of the action; it contains the file list retrieved from the database.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
filelist	1	1
updatedlist	1	1

Example

```
<Results >
  <filelist/>
  <updatedlist/>
</Results>
```

Element Name: filelist**Description**

This element contains zero or more "file" elements showing the database results of the action.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
file	0	Unlimited

Example

```
<filelist>
  <file/>
</filelist>
```

Element Name: updatedlist**Description**

This element contains zero or more "file" elements showing the additional database results of the action.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
--------------	----------------	----------------

file	0	Unlimited
------	---	-----------

Example

```

<updatedlist>
  <file/>
</updatedlist>

```

Element Name: file

Description

This element contains the details of the file.

Attributes

Attribute Name	Data Type	Description
id	int	The id that that identifies this file
name	string	The display name of the file Character limit of 50.
description	string	The description of the file
filename	string	The actual file name
filelocation	string	The location where the file can be found.
filetype	string	The file type will be one of the following values: <ul style="list-style-type: none"> • "A" = Audio file • "D" = Word document • "F" = Other files • "I" = Images

fileext	string	The extension of the file.
filesize	int	The size of the file in bytes
patientid	int	The patient id
patientname	string	The patients name
patientchartnumber	int	The patients chart number
profileid	int	The provider billing profile id
profilecode	string	The provider billing profile code
profilename	string	The provider billing profile name
visited	int	The visit id
dos	datetime	The date the service was performed or started.
createdby	string	The login for the user who created this record
createdat	datetime	The date and time that this record was created
printedby	string	The login for the user who printed this item last
printedat	datetime	The date and time that the item was last printed
reviewedby	string	The login of the person who flagged this file as reviewed.
reviewedat	datetime	The date and time the file was flagged as reviewed.
approvedby	string	The login of the person who flagged this file as approved
approvedat	datetime	The date and time the file was flagged as approved.
lockedby	string	The login of the user who flagged this file as locked.

lockedat	datetime	The date and time this file was flagged as locked.
changedby	string	The login of the last user to make a change to this file.
changedat	datetime	The date and time of the last change to this record.
revision	int	The revision number of this file (0 means the file has not been revised)
zipmode	int	<p>The zip mode will be one of the following values:</p> <ul style="list-style-type: none"> • 0 = The file data is uncompressed • 2 = The file data is zipped
serverfile	int	<p>The server file field may be on of the following values:</p> <ul style="list-style-type: none"> • "0" = The file is stored at the client site • "1" = The file is stored on the AMD servers

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
docinfo	0	1
categorylist	0	1
Revisionlist	0	1

Example

```
<file id="2" name="TEMPLATE-563-GARAM-20050405" description="TEMPLATE-563-GARAM-20050405" filename=" TEMPLATE-563-GARAM-20050405.DOC"
  filelocation="20050405-000\" filetype="D" fileext="DOC" filesize=""
  patientid="0" patientname="" patientchartnumber="" profileid="15"
  profilecode="YOUNG" profilename="YOUNG,ROBERT E" visitid="" dos=""
  createdby="PPMD_TRAVIS" createdat="2005-04-05T14:36:00.817"
  printedby="" printedat="" reviewedby="" reviewedat="" approvedby=""
  approvedat="" lockedby="" lockedat="" changedby="PPMD_TRAVIS"
  changedat="2005-04-05T14:36:00.817" revision="0" zipmode="0"
  serverfile="1">    <docinfo/>    <categorylist/>    <revisionlist/></f
ile>
```

Element Name: docinfo

Description

This element contains the document information for word documents. This information is only available for documents that are created using the AMDS web application or Transcription Manager application.

Attributes

Attribute Name	Data Type	Description
resourceid	int	The transcription resource associated with this document
template	string	The template that this document is based on
countchars	int	The number of characters in this document
countcharswspaces	int	The number of characters with spaces included
countwords	int	The number of words in this document
countlines	int	The number of lines in this document
countparas	int	The number of paragraphs in this document

countpages	int	The number of pages in this document
------------	-----	--------------------------------------

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<docinfo resourceid="" template=" TEMPLATE" countchars="9"
countcharswspaces="9"
countwords="2" countlines="2" countparas="1" countpages="1"/>
```

Element Name: categorylist

Description

This element contains list of categories associated with the file in the database.
This element will not exist if there are no categories.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
category	1	Unlimited

Example

```
<categorylist >
  <category/>
</categorylist>
```

Element Name: category**Description**

This element contains the information about the specific category.

Attributes

Attribute Name	Data Type	Description
id	int	The id of the category
categorycode	string	The code for the category
categoryname	string	The name of the category
groupcode	string	The code for the group
groupname	string	The name of the group

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<category id="4" categorycode="NONE" categoryname="Unspecified"
groupcode="MISC" groupname="Miscellaneous"/>
```

Element Name: revisionlist**Description**

This element contains list of revisions associated with the file in the database.
This element will not exist if there are no revisions.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
revision	1	Unlimited

Example

```
<revisionlist >  
  <revision/>  
</revisionlist>
```

Element Name: revision

Description

This element contains the information about the revision.

Attributes

Attribute Name	Data Type	Description
id	int	The id of the revision
revision	int	The revision number of this file.
name	string	The display name for the file. Character limit of 50.
description	string	The description of the file
filename	string	The file name of this revision.
filelocation	string	The file location of this revision.
filesize	int	The size of the file.
comments	string	The comments about the revision.
createdby	string	The user who initially created this revision
createdat	datetime	The date the revision was initially created

changedby	string	The user who changed the revision last.
changedat	datetime	The date and time the revision was changed.
printedby	string	The user who printed the revision last.
printedat	datetime	The date and time the revision was last printed.
reviewedby	string	The user who reviewed the revision.
reviewedat	datetime	The date and time the revision was reviewed.
approvedby	string	The user who approved the revision.
approvedat	datetime	The date and time the revision was approved.
lockedby	string	The user who locked the revision.
lockedat	datetime	The date and time the revision was locked.
countchars	int	The count of characters in this revision.
countcharswspaces	int	The count of characters with spaces in this revision.
countwords	int	The count of words in this revision.
countlines	int	The count of lines in this revision.
countparas	int	The count of paragraphs in this revision.
countpages	int	The count of pages in this revision.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<revision id="4" name="JJSouthSOAPNotes" description="Soap notes for
JJSouth" filename="994223-3-000.DOC" filelocation="docs\"
filesize="100234" comments="" createdby="PPMD_TRAVIS" createdat="2005-
04-05T14:34:02.325" changedby="PPMD_TRAVIS"
changedat="2005-04-05T14:36:00.817" printedby="" printedat=""
reviewedby="" reviewedat="" approvedby="" approvedat="" lockedby=""
lockedat="" countchars="9" countcharswspaces="9" countwords="2"
countlines="2" countparas="1" countpages="1" />
```

Element Name: Error

Description

This element contains the any errors that occurred with this call.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
Fault	0	1

Example

```
<Error>
  <Fault/>
</Error>
```

Element Name: Fault

Description

This element contains the fault that occurred.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
faultcode	1	1
faultstring	1	1
detail	1	1

Example

```
<Fault >  
  <faultcode/>  
  <faultstring/>  
  <detail/>  
</Fault>
```

Element Name: faultcode

Description

This element contains one of the following values:

- "Client" = any errors with the message passed that are client correctable.
- "Server" = any server errors that are not, generally, correctable by the client.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<faultcode>  
Server  
</faultcode >
```

Element Name: faultstring

Description

This element contains a long description of the "faultcode" and will be one of the two following values:

- "Server Error"
- "Client Error"

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<faultstring>  
Server Error  
</faultstring>
```

Element Name: detail**Description**

This element contains the details of the error that occurred.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
code	1	1
description	1	1
class	1	1
method	1	1
source	1	1
extrainfo	1	1

Example

```
<detail>
  <code/>
  <description/>
  <class/>
  <method/>
  <source/>
  <extrainfo/>
</detail>
```

Element Name: code**Description**

This element contains the PPMD Error code. A listing of error codes can be found at (<http://intranet/ProductSpecs/CAT-Standards%20and%20Procedures/CAT-Developers%20Documentation/CAT-Documents/ErrorCodes.htm>)

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<code>  
-2147219456  
</code>
```

Element Name: description**Description**

This element contains the description of the error.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<description>  
The required element "File" was not found.  
</description>
```

Element Name: class

Description

This element contains the class that reported the error

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<class>  
AdvancedMD_FileChart.Files  
</class>
```

Element Name: method

Description

This element contains the method that reported the error

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<method>  
WriteFile  
</method>
```

Element Name: linenumber

Description

This element contains the line number that the error was reported on.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<linenumber >
```

141

</linenumber>

Element Name: source

Description

This element contains the source of the error.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<source>  
[source information here]  
</source>
```

Element Name: extrainfo

Description

This element contains any extra information that will help in tracking down this fault.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<extrainfo>  
[any extra information about the fault here]  
</extrainfo>
```

Chart File Categories

- **Group id:** 1
- **Code:** OURCHT
- **Name:** Our Chars

Subcategories

Category Id	Code	Name
26	AD	Advanced Directive
1	OCLABS	Labs
2	OCMEDS	Medications
3	OCMISC	Miscellaneous
4	OCNNOT	Nurse Notes
5	OCREFS	Referrals
6	OCSOAP	Soap Notes
7	OCTEST	Tests
8	OCVTLS	Vitals
9	OCXRAY	X-rays

- **Group id:** 2
- **Code:** OUTCHT

- **Name:** Outside Chars

Subcategories

Category Id	Code	Name
10	OTLABS	Labs
11	OTMISC	Miscellaneous
12	OTCOMM	Other Communications
13	OTTEST	Tests
14	OTXRAY	X-rays

- **Group id:** 3
- **Code:** BILLIN
- **Name:** Billing

Subcategories

Category Id	Code	Name
15	BICOLL	Collection
16	BICONS	Consent
19	BININS	Insurance Cards
20	BIOINS	Old insurance
21	BIPFRM	Patient Form
28	BIEDIR	Archived EDI Reports
49	PTRCPT	Patient Receipts
22	BIUNSP	Unspecified

- **Group id:** 4
- **Code:** MISC
- **Name:** Miscellaneous

Subcategories

Category Id	Code	Name
23	MIOTHE	Other ID
24	MIPPHO	Patient Photo

25	MIUNSP	Unspecified
----	--------	-------------

- **Group id:** 5
- **Code:** PTFORM
- **Name:** Patient Forms

Subcategories

Category Id	Code	Name
35	PTFORM	E-Patient Forms

- **Group id:** 6
- **Code:** CONSNT
- **Name:** Consent Forms

Subcategories

Category Id	Code	Name
31	CONSNT	E-Consent Forms

Updatedownloadstatus Message Specification

"Updatedownloadstatus" Action Message Entity Layout

```
<ppmdmsg>
  <filelist>
    <file/>
  </filelist>
</ppmdmsg>
```

"Updatedownloadstatus" Action Message XML Schema Entity Definition

Element Name: ppmdmsg

Description

This is the root element; it describes the action and class that will handle the message.

Attributes

Attribute Name	Data Type	Required	Value	Description
action	string	Yes	"updatedownloadstatus"	The action to be performed
class	string	Yes	"files"	The class that will be handling the action specified.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
filelist	1	1

Example

```
<ppmdmsg action="updatedownloadstatus" class="files">  
  <filelist/>  
</ppmdmsg>
```

Element Name: filelist

Description

This is the element contains 1 or more file elements.

Attributes

Attribute Name	Data Type	Required	Default Value	Description
No attributes defined.				

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
file	1	Unlimited

Example

```
<filelist>  
  <file/>  
</filelist>
```

Element Name: file

Description

This element lists the file ids that you wish to have the status updated for.

Attributes

Attribute	Data Type	Required	Default	Description
-----------	-----------	----------	---------	-------------

Name			Value	
id	int	Yes	n/a	The file id being updated
downloadstatus	unsignedByte	Yes	n/a	The download status to set to the file: <ul style="list-style-type: none"> • 0 = Not retrieved • 1 = Retrieved • 2 = Complete

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<file id="4" downloadstatus="2" />
```

"Updatedownloadstatus" Action Response Entity Layout

```

<PPMDResults>
  <Results/>
  <Error>
    <Fault>
      <faultcode/>
      <faultstring/>
    
```

```

        <detail>
            <code/>
            <description/>
            <class/>
            <method/>
            <linenumber/>
            <source/>
            <extrainfo/>
        </detail>
    </Fault>
</Error>
</PPMDResults>

```

"Updatedownloadstatus" Action Response XML Schema Entity Definition

Element Name: PPMDResults

Description

This is the root element; it may or may not contain a "Results" element and will have a "Fault" element that will be empty if there were no errors to report.

Attributes

Attribute Name	Data Type	Description
No attributes defined.		

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
Results	0	1
Error	0	1

Example

```
<PPMDResults>
  <Results/>
  <Error/>
</PPMDResults>
```

Element Name: Results

Description

This element contains the results of the action. This element will only be here if the action was a success. If there was a failure the success flag will be missing and the "Error" element will be populated.

Attributes

Attribute Name	Data Type	Description
success	boolean	The success flag will be true if the update was successful.

Child Elements

Element Name	Minimum Occurs	Maximum Occurs
No children defined.		

Example

```
<Results success="true" / >
```

Element Name: Error

Description

For the description of this element and all of its children see the "uploadfile" action response element definition.

AdvancedMD EHR APIs

A collection of RESTful APIs that can be used to interact with AdvancedMD EHR data.

Resource Types

URIs are relative to <https://providerapi.advancedmd.com/ehr-api>, unless otherwise noted.

Audit

For more information, see [Audit](#).

Method	Endpoint	Description
POST	/files/documents	

DocumentPostRequest

For more information, see [DocumentPostRequest](#).

Method	Endpoint	Description
POST	/files/documents	

DocumentPostResponse

For more information, see [DocumentPostResponse](#).

Method	Endpoint	Description
POST	/files/documents	

POST /files/documents

HTTP Request

`https://providerapi.advancedmd.com/ehr-api/files/documents`

Header Parameters

<code>appname (required)</code>	<p>string</p> <p>The application name ("AppName") provided to you when you registered your interface with AdvancedMD.</p>
---------------------------------	---------------------------------------------------------------------------------------------------------------------------

Request Body

`application/*+json`

array

DocumentPostRequest

<code>patientId (required)</code>	<p>integer (int32)</p> <p>Identifier of the patient to be associated with the document</p> <p>$1 \leq value \leq 2147483647$</p>
<code>name (required)</code>	<p>string</p> <p>File name</p>
<code>description</code>	<p>string</p> <p>Document description</p> <p>$0 \leq length \leq 255$</p>
<code>providerId</code>	<p>integer (int32)</p> <p>Identifier of the provider to be</p>

	associated with the document
date	string (date-time) Document date
isHighPriority	boolean Denotes the "High Priority" flag to be set for the document
isConfidential	boolean Denotes the "Confidential" flag to be set for the document
isHeld	boolean Denotes the "Hold" flag to be set for the document
isPatientEntered	boolean Flag denoting if the field value was entered by the patient
fileBlob	string File attached to document
fileExtension	string Attached file extension <i>$0 \leq length \leq 5$ matches <code>^\.?[a-zA-Z0-9]{1,4}\$</code></i>
categoryId	integer (int32) (Optional) Category (Folder) ID
departmentId	integer (int32) (Optional) Department ID
documentTypeId	integer (int32)

	(Optional) Document Type ID
audit	Audit Audit Model
itemDescription	string Audit data $0 \leq length \leq 4000$

Response Types

200: Success

Body

application/json

array

[DocumentPostResponse](#)

id	integer (int32) Document ID
name	string Name

400: Bad Request

401: Unauthorized

403: Forbidden

Authentication Requirements

API Key Authentication

Key location: `header`

Parameter name: Authorization

Audit

Audit Model

Schema

Audit

itemDescription	string Audit data $0 \leq$ <i>length</i> \leq 4000
-----------------	-----------------------------------------------------------------------------

Paths

The following paths use this type:

[/files/documents/post](#)

DocumentPostRequest

Document Post Request

Schema

DocumentPostRequest

patientId (required)	<p>integer (int32)</p> <p>Identifier of the patient to be associated with the document</p> <p>$1 \leq value \leq 2147483647$</p>
name (required)	<p>string</p> <p>File name</p>
description	<p>string</p> <p>Document description</p> <p>$0 \leq length \leq 255$</p>
providerId	<p>integer (int32)</p> <p>Identifier of the provider to be associated with the document</p>
date	<p>string (date-time)</p> <p>Document date</p>
isHighPriority	<p>boolean</p> <p>Denotes the "High Priority" flag to be set for the document</p>
isConfidential	<p>boolean</p> <p>Denotes the "Confidential" flag to be set for the document</p>

isHeld	<p>boolean</p> <p>Denotes the "Hold" flag to be set for the document</p>
isPatientEntered	<p>boolean</p> <p>Flag denoting if the field value was entered by the patient</p>
fileBlob	<p>string</p> <p>File attached to document</p>
fileExtension	<p>string</p> <p>Attached file extension</p> <p>$0 \leq length \leq 5$ <i>matches</i> <code>^\.?[a-zA-Z0-9]{1,4}\$</code></p>
categoryId	<p>integer (int32)</p> <p>(Optional) Category (Folder) ID</p>
departmentId	<p>integer (int32)</p> <p>(Optional) Department ID</p>
documentTypeId	<p>integer (int32)</p> <p>(Optional) Document Type ID</p>
audit	<p>Audit</p> <p>Audit Model</p>
itemDescription	<p>string</p> <p>Audit data</p> <p>$0 \leq length \leq 4000$</p>

Paths

The following paths use this type:

`/files/documents/post`

DocumentPostResponse

Document POST Response

Schema

DocumentPostResponse

id	integer (int32) Document ID
name	string Name

Paths

The following paths use this type:

[/files/documents/post](#)

Get List of Clinical Notes (clinicalnotes/notes)

Basic Construction: {{webserverurl}}/ehr-api/clinicalnotes/notes

Production Request: https://providerapi.advancedmd.com/ehr-api/clinicalnotes/notes

API Call Verb: GET

API Call Headers:

- appname: {{YOUR-APP-NAME}}
- Authorization: Bearer xxxxxxxxxxxx

API Call cURL:

```
curl --location 'https://providerapi.advancedmd.com/ehr-api/clinicalnotes/notes'

--header 'appname: TEMP'

--header 'Authorization: Bearer .....'
```

Response codes

200 - Success. Returns the updated account

400 - The input is null or invalid

403 - The authenticated user does not have permission to access this resource

500 - Internal Server Error

Example Success Response Payload:

```
[  
  
  {  
  
    "id": 100000048,  
  
    "patientId": 6031964,  
  
    "name": "Office Visit Intake Form",  
  
    "noteDateTime": "2020-10-27T12:11:00",  
  
    "confidential": false  
  
  },  
  
  {  
  
    "id": 100000050,  
  
    "patientId": 6031971,  
  
    "name": "Office Visit Intake Form",  
  
    "noteDateTime": "2020-10-27T14:19:00",  
  
    "confidential": false  
  
  },  
  
  {  
  
    "id": 100000052,
```

```
"patientId": 6031972,  
  
"name": "Office Visit Intake Form",  
  
"noteDateTime": "2020-03-27T15:20:00",  
  
"confidential": false  
  
}]
```

Get Clinical Note by Id (clinicalnotes/notes/{id})

Basic Construction: {{webserverurl}}/ehr-api/clinicalnotes/notes/notes/{id}

Production Request: https://providerapi.advancedmd.com/ehr-api/clinicalnotes/notes/100001508

API Call Verb: GET

API call Headers:

- appname: {{YOUR-APP-NAME}}
- Authorization: Bearer xxxxxxxxxxxx

API Call cURL:

```
curl --location 'https://providerapi.advancedmd.com/ehr-api/clinicalnotes/notes/1'
```

```
--header 'appname: TEMP'
```

```
--header 'Authorization: Bearer .....'
```

Response Codes

200 - Success. Returns the updated account

400 - The input is null or invalid

403 - The authenticated user does not have permission to access this resource

500 - Internal Server Error

Example Success Response Payload:

```
{  
  
  "noteId": 100001508,  
  
  "header": {  
  
    "providerId": 17,  
  
    "patientId": 6031902,  
  
    "patientsToAppointmentsLinker": [],  
  
    "categoryId": 2,  
  
    "departmentId": 1,  
  
    "appointmentId": null,  
  
    "serviceDate": "2023-08-23T03:30:00",  
  
    "timedInterval": "24:00",  
  
    "comments": "batmansuperman1",  
  
    "templateVersion": {  
  
      "templateId": 100027245,  
  
      "templateTypeId": 0,  
  
      "templateName": "Nurse Visit",  
  
      "versionId": 29538,  

```

```
    "version": 1

  },

  "isOnHold": false,

  "isHighPriority": false,

  "isPatientViewable": false,

  "isAssistant": false,

  "isClinicalSummary": false,

  "isConfidential": false,

  "isGuestViewable": false,

  "isSigned": false,

  "isReviewed": false,

  "isPatientForm": false,

  "isMyEyesOnly": false,

  "myEyesOnlyUserId": null,

  "medicationsReviewed": false,

  "allergiesReviewed": false,

  "problemsReviewed": false,
```

```
"narrativeTemplateId": 100027303,

"subNoteNarrativeTemplateIds": {},

"subNoteIsSigned": {},

"narrativeHtmlTemplateId": null,

"narrativeTemplateType": null,

"subNoteNarrativeHtmlTemplateIds": null,

"patientFormStatusId": null,

"patientFormComments": "",

"patientFormStatusMessage": null,

"createdOrUpdatedOn": "2023-08-23T03:32:44.123",

"printStatus": {

    "isPrinted": false,

    "printedOn": null

},

"createdOrUpdatedByUser": {

    "id": 11754,

    "loginName": "TEAM1",
```

```
        "fullName": " Team 1"

    },

    "annotations": [],

    "signPrincipals": [

        {

            "id": 1350,

            "user": {

                "id": 10148,

                "loginName": "ALEX",

                "fullName": "ALEX"

            },

            "rank": 1

        }

    ],

    "signHistories": [],

    "reviewHistories": [],

    "diagnosticCodes": []
```

```
    },  
    "pages": [...]  
  }  
}
```

Example Error Response Payload:

```
{  
  "message": "The note (ID: 1000015081) has not  
been found."  
}
```

Get Clinical Note Header by Id (clinicalnotes/noteheaders?noteid={id})

Basic Construction: {{webserverurl}}/ehr-api/clinicalnotes/noteheaders?noteid={id}

Production Request: https://providerapi.advancedmd.com/ehr-api/clinicalnotes/noteheaders?noteid=111111111

API Call Verb: GET

API call Headers:

- appname: {{YOUR-APP-NAME}}
- Authorization: Bearer xxxxxxxxxxxx

API Call cURL:

```
curl --location 'https://providerapi.advancedmd.com/ehr-api/clinicalnotes/noteheaders?noteid=111'
```

```
--header 'appname: TEMP'
```

```
--header 'Authorization: Bearer .....'
```

Response Codes:

200 - Success. Returns the updated account.

400 - The input is null or invalid.

403 - The authenticated user does not have permission to access this resource.

500 - Internal Server Error.

Example Success Response Payload:

```
{  
  
  "providerId": 17,  
  
  "patientId": 6031902,  
  
  "patientsToAppointmentsLinker": [],  
  
  "categoryId": 2,  
  
  "departmentId": 1,  
  
  "appointmentId": null,  
  
  "serviceDate": "2023-08-23T03:30:00",  
  
  "timedInterval": "24:00",  
  
  "comments": "batmansuperman1",  
  
  "templateVersion": {  
  
    "templateId": 100027245,  
  
    "templateTypeId": 0,  
  
    "templateName": "Nurse Visit",  
  
    "versionId": 29538,  
  
    "version": 1  
  
  },  
  
}
```

"isOnHold": false,

"isHighPriority": false,

"isPatientViewable": false,

"isAssistant": false,

"isClinicalSummary": false,

"isConfidential": false,

"isGuestViewable": false,

"isSigned": false,

"isReviewed": false,

"isPatientForm": false,

"isMyEyesOnly": false,

"myEyesOnlyUserId": null,

"medicationsReviewed": false,

"allergiesReviewed": false,

"problemsReviewed": false,

"narrativeTemplateId": 100027303,

"subNoteNarrativeTemplateIds": {},

```
"subNoteIsSigned": {},

"narrativeHtmlTemplateId": null,

"narrativeTemplateType": null,

"subNoteNarrativeHtmlTemplateIds": null,

"patientFormStatusId": null,

"patientFormComments": "",

"patientFormStatusMessage": null,

"createdOrUpdatedOn": "2023-08-23T03:32:44.123",

"printStatus": {

    "isPrinted": false,

    "printedOn": null

},

"createdOrUpdatedByUser": {

    "id": 11754,

    "loginName": "TEAM1",

    "fullName": " Team 1"

},
```

```
"annotations": [],

"signPrincipals": [

  {

    "id": 1350,

    "user": {

      "id": 10148,

      "loginName": "ALEX",

      "fullName": "ALEX"

    },

    "rank": 1

  }

],

"signHistories": [],

"reviewHistories": [],

"diagnosticCodes": []

}
```

Example Error Response Payload:

```
{  
  
  "message": "The note (ID: 1000015081) has not  
been found."  
  
}
```

Get List of Documents (files/-documents?PatientId={id})

Basic Construction: {{webserverurl}}/ehr-api/files/documents?PatientId={id}

Production Request: https://providerapi.advancedmd.com/ehr-api/files/documents?PatientId=213

API Call Verb: GET

API call Headers:

- appname: {{YOUR-APP-NAME}}
- Authorization: Bearer xxxxxxxxxxxx

API Call cURL:

```
curl --location 'https://providerapi.advancedmd.com/ehr-api/files/documents?PatientId=1'
```

```
--header 'appname: TEMP'
```

```
--header 'Authorization: Bearer .....'
```

Response Codes

200 - Success. Returns the updated account

400 - The input is null or invalid

403 - The authenticated user does not have permission to access this resource

500 - Internal Server Error

Example Success Response Payload:

```

[
  {
    "signedBy": "",
    "signed": false,
    "isReviewed": false,
    "reviewedBy": "",
    "status": "Saved",
    "description": " Test ",
    "doctorId": null,
    "doctor": "Other Provider",
    "date": "08/23/2023 12:00 AM",
    "updateDate": null,
    "parentId": 0,
    "parentTypeId": 0,
    "id": 2139492,
    "type": 9,
    "name": "Test_FILE",
    "isHighPriority": false,
    "isConfidential": false,
    "hasConfidentialPermission": true,
    "isHeld": false,
    "savedBy": "TEAM1",
    "isPatientEntered": false,
    "diagnosisCodes": null,
    "docTypeId": 0,
    "documentType": "-",
    "isPreviewable": false,
    "categoryId": 8,
    "consentForm": null,
    "children": []
  },
  {
    "signedBy": "",
    "signed": false,

```

```
    "isReviewed": false,
    "reviewedBy": "",
    "status": "Saved",
    "description": " Test ",
    "doctorId": null,
    "doctor": "Other Provider",
    "date": "08/23/2023 12:00 AM",
    "updateDate": null,
    "parentId": 0,
    "parentTypeId": 0,
    "id": 2139493,
    "type": 9,
    "name": "Test_FILE",
    "isHighPriority": false,
    "isConfidential": false,
    "hasConfidentialPermission": true,
    "isHeld": false,
    "savedBy": "TEAM1",
    "isPatientEntered": false,
    "documentType": "-",
    "isPreviewable": false,
    "categoryId": 8,
    "consentForm": null,
    "children": []
  }
]
```

Example Error Response Payload:

```
{
  "errors": {
    "patientId": [
      "The value '603xxxx' is not valid for PatientId."
    ]
  }
}
```

```
    ]  
  },  
  "type": "https://tools.ietf.org/html/rfc7231#section-6.5.1",  
  "title": "One or more validation errors occurred.",  
  "status": 400,  
  "traceId": "xxxxx"  
}
```

Get Document by Id (files/-documents/{id})

Basic Construction: {{webserverurl}}/ehr-api/files/documents/{id}

Production Request: https://providerapi.advancedmd.com/ehr-api/files/documents/2139492

API Call Verb: GET

API Call Headers:

- appname: {{YOUR-APP-NAME}}
- Authorization: Bearer xxxxxxxxxx

API Call cURL:

```
curl --location 'https://providerapi.advancedmd.com/ehr-api/files/documents/1'
```

```
--header 'appname: TEMP'
```

```
--header 'Authorization: Bearer .....'
```

Response Codes

200 - Success. Returns the updated account

400 - The input is null or invalid

403 - The authenticated user does not have permission to access this resource

500 - Internal Server Error

Example Success Response Payload:

```
{
  "signedBy": null,
  "signed": false,
  "isReviewed": false,
  "reviewedBy": null,
  "status": "Saved",
  "description": "Test",
  "doctorId": null,
  "date": "08/23/2023",
  "id": 2139492,
  "type": 9,
  "name": "Test_FILE",
  "isHighPriority": false,
  "isConfidential": false,
  "isHeld": false,
  "savedBy": "TEAM1",
  "isPatientEntered": false,
  "diagnosisCodes": [],
  "docTypeId": 0,
  "documentType": "-",
  "fileBlob": null,
  "fileExtension": null,
  "categoryId": 8
}
```

Upload Document (files/documents)

Basic Construction: `{{webserverurl}}/ehr-api/files/documents`

Production Request: `https://providerapi.advancedmd.com/ehr-api/files/documents`

API Call Verb: POST

API call Headers:

- appname: `{{YOUR-APP-NAME}}`
- Authorization: Bearer xxxxxxxxxxxx

Payload:

```
[
  {
    "patientId": "6031902",
    "name": "Test_FILE",
    "description": "Testing ehr-api proxy",
    "fileBlob": "VGhpcyBpcyBDSUNEIGludGVncmF0aW9uIHRlc3QhIQ=="
  }
]
```

Required fields:

- patientId
- name
- fileBlob

API Call cURL:

```
curl --location 'https://providerapi.advancedmd.com/ehr-api/files/documents'
```

```
--header 'appname: TEMP'

--header 'Authorization: Bearer ..... '

--data '[{

  "patientId": "11111",

  "name": "TEST_FILE",

  "description": "Testing ehr", "fileBlob": "VGhpcy..."

}]'
```

Response Codes

200 - Success. Returns the updated account

400 - The input is null or invalid

403 - The authenticated user does not have permission to access this resource

500 - Internal Server Error

Example Success Response Payload:

```
[
  {
    "id": 2139590,
    "name": "Test_FILE"
  }
]
```

Example Error Response Payload:

```
{
  "type": "https://tools.ietf.org/html/rfc7231#section-6.6.1",
  "title": "Server Error",
  "status": 500,
  "detail": "An error occurred while processing the request.",
  "traceId": "00-ed24618e0304224e05a7b1013c56a927-
cacc5b61b1520ac1-01",
  "Identifier": "00-ed24618e0304224e05a7b1013c56a927-
cacc5b61b1520ac1-01"
}
```

Get Encounters (/encounters/Encounters?PatientId={id})

Basic Construction: {{webserverurl}}/ehr-api/encounters/Encounters?PatientId={id}

Production Request: https://providerapi.advancedmd.com/ehr-api/encounters/Encounters?PatientId=6

API Call Verb: GET

API Call Headers:

- appname: {{YOUR-APP-NAME}}
- Authorization: Bearer xxxxxxxxxxxx

API Call cURL:

```
curl --location 'https://providerapi.advancedmd.com/ehr-api/encounters/Encounters?PatientId=11111'
```

```
--header 'appname: TEMP'
```

```
--header 'Authorization: Bearer .....'
```

Response Codes

200 - Success. Returns the updated account

400 - The input is null or invalid

403 - The authenticated user does not have permission to access this resource

500 - Internal Server Error

Example Success Response Payload:

```
[
  {
    "signedBy": "",
    "signed": true,
    "description": "Booked",
    "doctor": "JONES,CAMERON,MD",
    "doctorId": 3,
    "date": "07/31/2023",
    "id": 9602475,
    "type": 3,
    "templateName": "CONSULTATION",
    "userHasPermissionForProvider": true,
    "statusId": 0,
    "categoryId": null,
    "highPriorityFlag": false,
    "hold": false,
    "parentId": 0,
    "parentTypeId": 0,
    "children": []
  },
  {
    "signedBy": "",
    "signed": true,
    "description": "Checked In",
    "doctor": "JONES,CAMERON,MD",
    "doctorId": 3,
    "date": "07/21/2023",
    "id": 9602453,
    "type": 3,
    "templateName": "CONSULTATION",
    "userHasPermissionForProvider": true,
    "statusId": 1,
    "categoryId": null,
    "highPriorityFlag": false,
```

```
    "hold": false,
    "parentId": 0,
    "parentTypeId": 0,
    "children": []
  }
]
```

Example Error Response Payload:

```
{
  "errors": {
    "patientId": [
      "The value '6031902s' is not valid for PatientId."
    ]
  },
  "type": "https://tools.ietf.org/html/rfc7231#section-6.5.1",
  "title": "One or more validation errors occurred.",
  "status": 400,
  "traceId": "xxxxxxxxxxxxxxxxxxxxxxxxxxxx"
}
```

AdvancedMD Lab APIs

AdvancedMD Labs API

1. Overview

Welcome to the AdvancedMD Labs Application Program Interface (API). This API allows application developers to interact with lab records within the AdvancedMD EHR product in a secure, RESTful manner.

2. Login Process

Description

Sending a request to the AdvancedMD Labs API requires a valid authorization token to be present in every request header except login. Retrieving this token is a two-step process.

1. Request a login URL from the Partner Login portal.
2. Use the URL from the Partner Portal login response to request a token.

***Note:** Login requests are sent via a HTTPS POST with a JSON body, and responses are received in an XML format.*

2.1 Request login endpoint from Partner Login

Description

In step one of this process, you will request a login endpoint from the Partner Portal. The URL in the response body will be used in the next step to request an authorization token.

Resource URL: POST

<https://partnerlogin.advancedmd.com/practicemanager/xmlrpc/processrequest.aspx>

2.1.1 Request Body Example

```
{
```

```
"ppmdmsg": {
  "@action": "login",
  "@class": "login",
  "@msgtime": "04/02/2021 2:07:00 PM",
  "@username": "{{UserName}}",
  "@psw": "{{Password}}",
  "@officecode": {{OfficeKey}},
  "@appname": "{{AppName}}"
}
```

Note: For sandbox testing and an app name has not yet been registered, use "TEMP" as the appname. App name registration requests can be submitted to interop@advancedmd.com.

2.1.2 Success Response

Status Code: 200 OK

Meaning: Response body contains the URL used to request an authorization token.

Response Body Example

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-1-7464c9sample"
lst="02/04/2025 10:37:21">
  <Results success="0">
    <usercontext
webserver="https://providerapi.advancedmd.com/processrequest/a
pi-999/TEMP" reportingServerURL="https://reportingservices-
104.advancedmd.com/rs/reportrequest.aspx"
helpurl="https://ow2-help-01-prd.advancedmd.com/help/"
```



```

username="PPMD_SAMPLE" />
</Results>
<Error>
  <Fault>
    <faultcode>Client</faultcode>
    <faultstring>Client Error</faultstring>
    <detail>
      <code>-2147220476</code>
      <description>The Office Key 99999 must be
redirected to
https://providerapi.advancedmd.com/processrequest/api-
999/TEMP. When logging in to AdvancedMD, if no security token
(&lt;usercontext&gt; text) is returned, then you must redirect
your login to the server indicated in the "webserver"
attribute of the usercontext element.</description>
      <class>Login</class>
      <method>LoginUserAsync</method>
      <linenum>765</linenum>
      <source>AdvancedMD.Security.Login+&lt;LoginUse
rAsync&gt;d__
25.AdvancedMD.Security.Login+&lt;LoginUserAsync&gt;d__
25</source>
      <extrainfo />
    </detail>
  </Fault>
</Error>
</PPMDResults>

```

Response Body Field Definition (relevant fields only)

Field	Type (? Indicates nullable)	Description
webserver	string	Response XML element usercontext contains an attribute named webserver.

Note: The value in the "webserver" attribute is used in the next step.

2.1.3 Error Responses

Status Code	Meaning	Example Body (if any)
400 Bad Request	Invalid response or missing data in the request	{"error":"Bad Request"}
500 Internal Server Error	Unexpected server-side error	{"error":"An unexpected error occurred"}

2.2 Request an Authorization Token

Description

Use the URL provided in the Partner Portal login response body to request an authorization token.

Resource URL: POST

<https://providerapi.advancedmd.com/processrequest/api-999/TEMP>

Note: this URL is from XML response defined in the previous step.

2.2.1 Request Body Example

```
{
  "ppmdmsg":{
    "@action":"login",
    "@class":"login",
```

```

"@msgtime":"04/02/2021 2:07:00 PM",
"@username":"{{UserName}}",
"@psw":"{{Password}}",
"@officecode":{{OfficeKey}},
"@appname":"{{AppName}}"
}

```

2.2.2 Sucecss Response

Status Code: 200 OK

Meaning: Response body contains an authorization token that must be added to all API request headers for this session. This token expires 24 hours after issuance.

***Note:** API requests with an expired token will return a 401 Unauthorized response.*

Response Body Example

```

<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-1-7464c9sample"
lst="02/04/2025 10:37:21">
<Results success="1" api="0">
  <usercontext
webserver="https://providerapi.advancedmd.com/processrequest/a
pi-999/TEMP" 394323_this_is_a_sample_token_38383838382 />
</Results>
</PPMDResults>

```

Response Body Field Definitions

Field	Type	Description
webserver	string	The XML element usercontext contains the authorization token used in all subsequent API calls for this session.

2.2.3 Error Responses

Status Code	Meaning	Example Body (if any)
400 Bad Request	Invalid response or missing data in the request	{"error": "Bad Request"}
500 Internal Server Error	Unexpected server-side error	{"error": "An unexpected error occurred"}

3. Endpoint Reference

3.1 GET /companies

Description

Returns a list of lab companies associated with the office/license key for which the currently authenticated user has permission.

Resource URL: GET <https://providerapi.advancedmd.com/ehr-api/{{Host}}/{{AppName}}/labs/companies>

3.1.1 Request Headers

Header	Example Value	Description
Authorization	Bearer s@mp1et0ken...	Required. Authorization token obtained via login.

3.1.2 Request Body

This endpoint does not use a request body.

3.1.3 Success Response

Status Code: 200 OK

Meaning: Response body contains a collection of Lab Companies. Will return an empty array if no lab companies are setup for current office/license key.

Response Body Example

```
[
  {
    "id": 11,
    "name": "Imaging Central",
    "comment": "Corporate HQ",
    "typeId": 236,
    "setups": [
      {
        "id": 24,
        "name": "Mammography / DEXA"
      },
      {
        "id": 30,
        "name": "Fluroscopy"
      }
    ]
  }
]
```

Response Body Field Definitions

Field	Type (? Indicates nullable)	Description
id	int	Unique Identifier for Lab company
name	string?	Lab company name
comment	string?	Comment for this lab company
typeId	int	Company type identifier
setups	object	Collection of Setup Info referencing lab config. May be an empty array.
setups id	int	Unique Id for setup
setups name	string?	Name/Description of setup

3.1.4 Error Responses

Status Code	Meaning	Example Body (if any)
400 Bad Request	Invalid response or missing data in the request	{"error": "Missing required parameter"}
401 Unauthorized	Missing/Invalid Token	{"error": "The token specified is missing or no longer valid"}
403 Forbidden	Token is valid, but user lacks permission	{"error": "Access Denied"}
404 Not Found	Resource not found, if used for single company ID	{"error": "Not Found"} [SB1]
500 Internal Server Error	Unexpected server-side error	{"error": "An unexpected error occurred"}

3.2 GET /orders

Description

Returns a list of lab orders filtered by Patient ID, Provider ID, include no results/links and whether to include related orders.

Resource URL: GET <https://providerapi.advancedmd.com/ehr-api/{{Host}}/{{AppName}}/labs/orders>

3.2.1 Request Headers

Header	Example Value	Description
Authorization	Bearer s@mp1et0ken...	Required. Authorization token obtained via login.

3.2.2 Query Parameters

Name	Type	Required	Description
patientId	Int	Yes	Patient ID to filter orders by.
provider	String	No[NT1]	Provider ID to filter order by. Note: -1 is all providers
noLinks	Bool	No	If true, omits any hyperlink-related data from the response.
includeChildren	Bool	No	If true, includes child (nested) data for each lab order.

Query Parameters Example:

/orders?patientId=123&provider=456&noLinks=true&includeChildren=false

3.2.3 Success Response

Status Code: 200 OK

Meaning: Response body contains a collection of lab orders matching your criteria.

Response Body Example

```
[
  {
    "name": "#49",
    "description": "Pap Smear, ",
    "typeId": 6,
    "type": "Order",
    "date": "2024-06-01T10:49:58",
    "id": 49,
    "doctorId": 3,
    "doctor": "HOWSER,DOOGIE,MD",
    "signedBy": "CARLA",
    "signed": true,
    "parentId": 0,
    "parentTypeId": 0,
    "highPriorityFlag": false,
    "userHasPermissionForProvider": true,
    "confidential": false,
    "hasConfidentialPermission": true,
    "notified": false,
    "hold": false,
    "status": "Signed",
```

```

    "companyName": "Slabcorp",
    "comment": null,
    "abnormal": false,
    "categoryId": 4,
    "children": []
  }
]

```

Response Body Field Definitions

Field	Type (? Indicates nullable)	Description
id	int	Lab Order ID
name	string?	Lab template name
description	string?	Order description
typeId	int	Chart item type ID
date	datetime	Date created / updated
doctorId	Int?	Provider profile ID
doctor	String?	Provider Name
signedBy	string?	Name of person who signed order
signed	bool	If true, order has been

		signed
parentId	int	ID of parent order
parentTypeId	int	Parent order type
highPriorityFlag	bool	Order is high priority
userHasPermissionForProvider	bool	Indicates user has permission as provider
confidential	bool	If true, order contains confidential information
hasConfidentialPermission	bool	If user does not have permission to view confidential info, will be masked.
notified	bool	Patient has been notified or results
hold	bool	If true, order is on hold
status	string?	Order Status
companyName	string?[NT1] 50 chars max	Lab company name
comment	string?[NT2] 255 chars max	Order comments

abnormal	bool	Order has abnormal results
categoryId	int?	[NT3] Folder category of order.
children	object	Recursive collection of related child lab orders. May be empty array.

3.2.4 Error Responses

Status Code	Meaning	Example Body (if any)
400 Bad Request	Invalid response or missing data in the request	{"error": "Missing required parameter"}
401 Unauthorized	Missing/Invalid Token	{"error": "Missing required parameter"}
403 Forbidden	Token is valid, but user lacks permission	{"error": "Access Denied"}
404 Not Found	Resource not found, if used for single company ID	{"error": "Not Found"}
500 Internal Server Error	Unexpected server-side error	{"error": "An unexpected error occurred"}

3.3 POST /orders

Description

Creates a new Lab Order for the specified patient and provider , along with its associated tests, test questions, test answers and signers.

Returns the newly created order's unique identifier.

Resource URL: POST <https://providerapi.advancedmd.com/ehr-api/{{Host}}/{{AppName}}/labs/orders>

3.3.1 Request Headers

Header	Example Value	Description
Authorization	Bearer s@mp1et0ken...	Required. Authorization token obtained via login.

3.3.2 Request Body (Example)

```
{
  "patientId": 214,
  "labId": 73647,
  "reason": "string",
  "orderDatetime": "2025-01-30T17:01:38.672Z",
  "collectDatetime": "2025-01-30T17:01:38.672Z",
  "profileId": 647,
  "setupId": 74837,
  "billOption": 3267,
  "primaryInsCarrier": "string",
  "primaryGroup": "string",
  "primaryInsId": "string",
  "secondInsCarrier": "string",
  "secondGroup": "string",
  "secondInsId": "string",
}
```

```

"tertiaryInsCarrier": "string",
"tertiaryGroup": "string",
"tertiaryInsId": "string",
"labCc": "string",
"holdFlag": true,
"priorityId": 24847,
"departmentId": 0,
"confidential": true,
"assistant": true,
"facilityId": 74867,
"pscHold": true,
"dateOfInjury": "2025-01-30T17:01:38.672Z",
"handwrittenFlag": true,
"highPriorityFlag": true,
"appointmentId": 47464,
"tests": [
  {
    "diagnosisCode1Id": 267,
    "diagnosisCode2Id": 27,
    "diagnosisCode3Id": 247,
    "diagnosisCode4Id": 2836,
    "comments": "string",
    "id": 3647,
    "description": "string",
    "rowLoc": 21477,
    "columnLoc": 7467,
    "isChecked": true
  }
],
"testAnswers": [
  {
    "testCodeLookupId": 143647,
    "questionNumber": 32767,
    "question": "string",

```

```

        "answer": "string"
    }
],
"providerAnswers": [
    {
        "questionId": 474847,
        "answer": "string"
    }
],
"signers": [
    0
],
"categoryId": 7
}

```

3.3.3 Request Body Field Definitions

Field	Type (? Indicates nullable)	Description
patientId	int	Patient ID
labId	int	Lab company id
reason	string? 255 chars max	Lab order reason
orderDatetime	datetime	Date created / updated
collectDatetime	datetime?	Date and time the specimen was collected
profileId	int	Provider profile ID
setupId	int	Lab tests setup ID
billOption	int16	Who the order should be billed to

primaryInsCarrier	string 60 chars max	Primary carrier name
primaryGroup	string 33 chars max	Primary carrier group
primaryInsId	string 25 chars max	Primary carrier Subscriber ID/Claim #
secondInsCarrier	string 60 chars max	Secondary carrier name
secondGroup	string 33 chars max	Secondary carrier group
secondInsId	string 25 chars max	Secondary carrier Subscriber ID/Claim #
tertiaryInsCarrier	string 60 chars max	Tertiary carrier name
tertiaryGroup	string 33 chars max	Tertiary carrier group
tertiaryInsId	string 25 chars max	Tertiary carrier Subscriber ID/Claim #
labCc	string 123 chars max	Comma separated provider names who will be messedged about the order and results.
holdFlag	bool	Mark that the item is on hold or not ready to sign
priorityId	int	Priority of the test and results
departmentId	int	Department ID
confidential	bool	Indicates that the item is sensitive (Only Discuss with Patient).
assistant	bool	Indicate if an order should

		be reviewed by an assistant before the provider signs it.
facilityId	int	Facility ID
pscHold	bool	<p>Patient Service Center. This is used when specimens for lab orders are collected at an off-site lab such as Quest or LabCorp.</p> <p>If you collect specimens for lab orders in your office, this flag should be set to False.</p>
dateOfInjury	datetime?	A date of injury when needed for Workers' Compensation claims
handwrittenFlag	bool	<p>Set True if you want to record the order and not send it.</p> <p>/// This is useful to record orders by other providers, and may be needed for Meaningful Use reporting.</p>
highPriorityFlag	bool	Mark the item as High Priority
appointmentId	int?	Appointment ID
tests	object	Collection of assigned tests.
tests diagnosisCode1Id	int?	First diagnosis code identifier
tests	int?	Second diagnosis code

diagnosisCode2Id		identifier
tests diagnosisCode3Id	Int?	Third diagnosis code identifier.
tests diagnosisCode4Id	int?	Fourth diagnosis code identifier.
tests comments	string?	Comments.
tests id	int	Test Identifier
tests description	string?	Test Description.
tests rowLoc	Int max 999	Grid row location on UI [NT1]
tests columnLoc	Int max 3	Grid column location on UI [NT2]
tests isChecked	bool	s Test Checked in EHR.
testAnswers	object	Collection of test answers. May be empty array.
testAnswers testCodeLookupId	int	Laboratory test ID.
testAnswers questionNumber	int16	Question number.
testAnswers question	string 255 chars max	Question text.
testAnswers answer	string 255 chars max	Question answer.
providerAnswers	object	Collection of Provider AOE (answer on entry). May be an empty array.
providerAnswers questionId	int	Question identifier.
providerAnswers answer	string 255 chars max	The answer.

signers	array of signer Id's	Collection of User IDs who must sign the chart item.
---------	-------------------------	---------------------------------------------------------

3.3.4 Success Response

Status Code: 200 OK

Meaning: Returns a newly created Lab Order identifier.

3.3.5 Response Body (Example)

999999

(Where 999999 is the new Lab Order's numeric ID)

3.3.6 Error Responses

Status Code	Meaning	Example Body (if any)
400 Bad Request	Invalid response or missing data in the request	{"error": "Missing required parameter"}
401 Unauthorized	Missing/Invalid Token	{"error": "The token specified is missing or no longer valid"}
403 Forbidden	Token is valid, but user lacks permission	{"error": "Access Denied"}
500 Internal Server Error	Unexpected server-side error	{"error": "An unexpected error occurred"}

3.4 PATCH /orders/{id}

Description

Updates an existing Lab Order by its unique identifier. Only fields supplied in the body will be updated; omitted fields remain unchanged.

Resource URL: PATCH <https://providerapi.advancedmd.com/ehr-api/{{Host}}/{{AppName}}/labs/orders/{id}>

3.4.1 Request Header

Header	Example Value	Description
Authorization	Bearer s@mp1et0ken...	Required. Authorization token obtained via login.

3.4.2 Path Parameter

Parameter	Type	Required	Description
id	Int	Yes	The Lab Order ID to be updated.

3.4.3 Request Body

A JSON object containing only the fields to be updated. Unspecified fields will remain unchanged.

Request Body Example

```
{  
  "categoryId": 214783  
}
```

3.4.4 Success Response

Status Code: 204 NO CONTENT

Meaning: The Lab Order was successfully updated. No response body is returned.

3.4.5 Error Responses

Status Code	Meaning	Example Body (if any)
400 Bad Request	The value specified is invalid or missing.	{"error": "Invalid or missing fields in request"}
401 Unauthorized	Missing/Invalid Token	{"error": "The token specified is missing or no longer valid"}
403 Forbidden	Token is valid, but user lacks permission	{"error": "Access Denied"}
404 Not Found	Lab Order with given Id not found.	{"error": "Not Found"}
500 Internal Server Error	Unexpected server-side error	{"error": "An unexpected error occurred"}

3.5 GET /providerquestions

Description

Retrieves a list of provider specific questions. If desired, the results can be filtered by lab company ID and/or one or more test codes.

Resource URL: GET <https://providerapi.advancedmd.com/ehr-api/{{Host}}/{{AppName}}/labs/providerquestions>

3.5.1 Request Header

Header	Example Value	Description
Authorization	Bearer s@mp1et0ken...	Required. Authorization token obtained via login.

3.5.2 Query Parameters

Name	Type	Required	Description
labId	int	No	Filters questions by a specific lab company ID.
codes	string	No	Test codes to filter questions.

Query Parameter Example:

/providerquestions?labid=12&codes=42&codes=6

3.5.3 Success Response

Status Code: 200 OK

Meaning: A list of provider questions matching the given filters (possibly an empty array if none match)

Response Body Example

```
[  
  {  
    "id": 0,  
    "responseFormat": "string",  
    "question": "string"
```

```
}  
]
```

Response Body Field Definitions

Field	Type (? Indicates nullable)	Description
id	int	Question Identifier
responseFormat	string?	Response Type
Question	String?	[SB1] Provider Question

3.5.4 Error Responses

Status Code	Meaning	Example Body (if any)
400 Bad Request	The value specified is invalid or missing.	{"error": "Invalid or missing fields in request"}
401 Unauthorized	Missing/Invalid Token	{"error": "The token specified is missing or no longer valid"}
403 Forbidden	Token is valid, but user lacks permission	{"error": "Access Denied"}
404 Not Found	Invalid part or query parameter.	{"error": "Not Found"} [SB1]
500 Internal Server Error	Unexpected server-side error	{"error": "An unexpected error occurred"}

3.6 GET /tests

Description

Retrieves a list of lab tests for specified setup Id.

Resource URL: GET <https://providerapi.advancedmd.com/tests>

3.6.1 Request Headers

Header	Example Value	Description
Authorization	Bearer s@mp1et0ken...	Required. Authorization token obtained via login.

3.6.2 Query Parameters

Name	Type	Required	Description
setupId	int	Yes	Filters response to only tests with this setup Id.

Query Parameter Example: /tests?setupid=12

3.6.3 Success Response

Status Code: 200 OK

Meaning: A list of lab tests, filtered by provided setup ID, if provided.
(possibly an empty array if none match)

Response Body Example

```
[  
  {
```

```

    "code": "string",
    "alert": "string",
    "instruction": "string",
    "questions": [
      {
        "questionNumber": 1,
        "question": "How many days in a week?"
      }
    ],
    "id": 2147483647,
    "description": "Cognitive assessment",
    "rowLoc": 2147483647,
    "columnLoc": 2147483647,
    "isChecked": true
  }
]

```

Response Body Field Definitions

Field	Type (? Indicates nullable)	Description
id	int	Test Identifier
description	string? 255 chars max	Test Description
rowLoc	int	Row location for UI
columnLoc	int	Column location for UI
isChecked	bool	Is Test Checked in EHR
code	string	Test Code
alert	string?	Test Alert

instruction	string?	Test Instruction
questions	object	Collection of Test Questions. May be an empty array.
questions questionNumber	int	Question Number
questions question	string?	Test Question

3.6.4 Error Responses

Status Code	Meaning	Example Body (if any)
400 Bad Request	The value specified is invalid or missing.	{"error": "Invalid or missing fields in request"}
401 Unauthorized	Missing/Invalid Token	{"error": "The token specified is missing or no longer valid"}
403 Forbidden	Token is valid, but user lacks permission	{"error": "Access Denied"}
404 Not Found	Invalid path or query specification.	{"error": "Not Found"} [SB1]
500 Internal Server Error	Unexpected server-side error	{"error": "An unexpected error occurred"}

3.7 POST /signandsend

Description

This endpoint is used to sign and submit a lab order.

Note: The password of the provider signing the order is required in the request body.

Resource URL: POST

https://partnerlogin.advancedmd.com/practicemanager/xmlrpc/processrequest.aspx

3.7.1 Request Body Example

```
{
  "ppmdmsg": {
    "@class": "lab",
    "@action": "signandsendorder",
    "@orderid": "481322",
    "@pwd": "signerpassword",
    "@nocookie": "1",
    "usercontext": "same value as header auth"
  }
}
```

Response Body Field Definition

Field	Type (? Indicates nullable)	Description
ppmdmsg	object	Container for request parameters.
@class	string	Value must be "lab"
@action	string	Value must be "signandsendorder"
@orderid	int	The unique order Id to be signed and submitted to lab.

@pwd	string	Signers password
@nocookie	bool	0=false, 1=true, must be true if not sending a cookie
usercontext	string	Token received at login, same value as request header Authorization

3.7.2 Request Headers

Header	Example Value	Description
Authorization	Bearer s@mp1et0ken...	Required. Authorization token obtained via login.

3.7.3 Success Response

Status Code: 200 OK

Meaning: The order was successfully signed and submitted to the lab. Response body contains tracking and timestamp information useful for the AdvancedMD service desk when requesting customer support. Results and Error elements will be empty.

Response Body Example

```
<?xml version='1.0' encoding='ISO-8859-1'?>
<PPMDResults s="advancedmd-api-processrequest-0-6b..."
lst="02/12/2025 09:32:58">
  <Results />
  <Error />
</PPMDResults>
```

Response Body Field Definitions

Field	Type (? Indicates nullable)	Description
Results	XML Element	Success returns empty element value.
Error	XML Element	Success returns empty element value.

3.7.4 Error Responses

Status Code	Meaning	Example Body (if any)
400 Bad Request	The value specified is invalid or missing.	{"error": "Invalid or missing fields in request"}
401 Unauthorized	Missing/Invalid Token	{"error": "The token specified is missing or no longer valid"}
403 Forbidden	Token is valid, but user lacks permission	{"error": "Access Denied"}
500 Internal Server Error	Unexpected server-side error	{"error": "An unexpected error occurred"}