Brightree Patient Web Services API

Reference Guide

V0100 – 1302

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Version

This documentation was prepared in conjunction with the latest release of **Brightree**, but may be utilized with future releases until such time that more current materials are published.

Comments

Any comments or suggestions regarding the information herein are welcome and should be emailed to the attention of:

documentation@brightree.com

Table of Contents

1. About This Guide 1

Audience 1

Assumptions 1

Conventions 1

WSDL Address 1

Related Documentation 1

2. Using the Patient API 3

3. Patients 4

Patient Operations and Service Contracts 4

PatientAdd MarketingReferral 4

PatientCreate 4

PatientFetchByBrightreeID 4

PatientFetchByExternalID 4

PatientPhoneNumberSearch 4

PatientRemoveMarketingReferral 5

PatientSearch 5

PatientUpdate 5

4. Patient Payor 6

Patient Payor Operations and Service Contracts 6

PatientPayorAdd 6

PatientPayorFetch 6

PatientPayorFetchAll 6

PatientPayorRemove 6

PatientPayorUpdate 6

5. Patient Notes 7

Patient Notes Operations and Service Contracts 7

PatientNoteCreate 7

PatientNoteFetchByKey 7

PatientNoteFetchByPatient 7

PatientNoteUpdate 8

6. Facility Resident 9

Facility Resident Operations and Service Contracts 9

FacilityMasterInfoFetchAll 9

FacilityResidentCreate 9

1. About This Guide

The *Brightree Patient Web Services API - Reference Guide* provides information regarding the operations and service contracts, and message definitions for creating, accessing, and updating Patients and Facility Resident Patients in the Brightree system. This guide is intended to be a reference point. The WSDL used in your development environment provides the full definition of the web service. For the patient message definitions refer to the *Brightree API Message Definitions Reference Guide.*

Audience

The audience for this guide is technical personnel with the following expertise:

- IT Development
- Applications Support
- Database Management

Assumptions

This document assumes that you are familiar with the Brightree system, APIs, and standard Web Service technologies based upon Extensible Markup Language (XML) and the Simple Object Access Protocol (SOAP).

Conventions

To help you locate and interpret information in this guide, the following conventions are used:

- *Italic* type is used for the titles of guides and chapters within a guide.
- Quotes (“like this”) are used for the names of topics within a section.
- The review bar (|) displays in the margins of this guide to indicate changes from the previous version.

Example: See “Flow Diagram” in *Chapter 1, Introduction*, in the *ABC User Guide*.

WSDL Address

The Patient Web Services API addresses are listed below.

For Stage (User Acceptance Test):

https://wstest.brightree.net/v0100-1302/OrderEntryService/patientservice.svc

For Production:

https://webservices.brightree.net/v0100-1302/OrderEntryService/patientservice.svc

Related Documentation

Additional Web Service information can be obtained in the following guides. Please refer to the following guides for more detailed information on specific web services:

- *Brightree Web Services API Getting Started Guide*

- *Brightree Documentation Web Services API – Reference Guide*
- *Brightree Common Web Services API - Reference Guide*
- *Brightree Inventory Web Services API - Reference Guide*
- *Brightree Order Entry Web Services API - Reference Guide*
- *Brightree Patient Billing Web Services API – Reference Guide*

The specific Brightree Web Services your organization uses is determined by your Brightree license agreement. During implementation, Brightree will enable use of the licensed Web Services.

2. Using the Patient API

The **Patient Web Service** allows external systems to create, update, fetch, and search Patients and Facility Residents, a special type of patient, within the Brightree system. Patient Notes can be created, updated, and retrieved.

In order to facilitate integration between systems, a Brightree Patient can be associated with an External ID. This allows the external systems to Fetch Patients using the External ID and to obtain the Brightree Patient ID for use in updating transactions.

The **Brightree Common Web Service** provides access to reference data that can be associated with a Patient. The external system updating the Brightree Patient through the Brightree Web Services API may or may not contain the following kinds of information to perform the direct association:

- Account Group
- Branch Office
- Clinical Data
- Insurance
- Marketing Representative
- Place of Service
- Practitioner
- Tax Zone

Refer to the *Brightree Common Web Services API - Reference Guide* for more information about the operations that allow retrieval of this reference data.

3. Patients

The Patients section lists the Patient Operations and Service Contracts and the Patient Message Definitions.

Patient Operations and Service Contracts

The Patient Web Service includes operations that allow an external system to create, update, fetch, and search for Patients.

PatientAdd MarketingReferral

Input Parameters – BrightreeID, ReferralBrightreeID

Return Object –DataWriteServiceResponse

This call is used to add a referral on patient with ReferralBrightreeID specified in input parameters. PatientBrightreeID is returned in the response.

PatientCreate

Input Parameters – Patient

Return Object –DataWriteServiceResponse

This operation is used to create a new Patient within the Brightree system. Patients must have a LastName, be of a valid PatientType, and be associated with a Branch Office.

On a successful create, the BrightreeID of the newly created Patient is returned as part of the DataWriteServiceResponse.

PatientFetchByBrightreeID

Input Parameters – BrightreeID

Return Object –DataFetchServiceResponse(Of Patient)

This call is used to fetch a Patient using the Brightree ID.

PatientFetchByExternalID

Input Parameters – ExternalID

Return Object –DataFetchServiceResponse(Of Patient)

This call is used to fetch a Patient using its External ID.

PatientPhoneNumberSearch

Input Parameters – PatientPhoneNumberSearchRequest, PatientPhoneSearchSortParameter, pageSize, page

Return Object –DataSearchServiceResponse(Of PatientPhoneNumberSearchResponse)

PatientRemoveMarketingReferral

Input Parameters – BrightreeID

Return Object – DataWriteServiceResponse

This call is used to remove referral from the PatientBrightreeID. PatientBrightreeID is returned in the response.

PatientSearch

Input Parameters – PatientSearchRequest

Return Object – DataSearchServiceResponse(Of PatientSearchResponse)

This call is used to search for Patients. Multiple parameters are allowed to be passed on the request, and in this case, all of the parameters are included (ANDed) together into a single query with a large Where clause.

PatientUpdate

Input Parameters – BrightreeID, Patient

Return Object – DataWriteServiceResponse

This call is used to update an existing Patient in the Brightree system.

4. Patient Payor

The Patient Payor section lists the Patient Payor Operations and Service Contracts and the Patient Payor Message Definitions.

Patient Payor Operations and Service Contracts

The Patient Web Service includes operations that allow an external system to create, update, remove, and fetch for Patient Payors.

PatientPayorAdd

Input Parameters – PatientKey, PayorKey, PatientPayor

Return Object – DataWriteServiceResponse

This call is used to add a new payor to an existing patient.

PatientPayorFetch

Input Parameters – PatientKey, PayorKey

Return Object –DataFetchServiceResponse(Of PatientPayor)

This call is used to return a specific payor associated with a patient.

PatientPayorFetchAll

Input Parameters – PatientKey

Return Object –DataFetchServiceResponse(Of PatientPayor)

This call is used to return all of the payors associated with an existing patient.

PatientPayorRemove

Input Parameters – BrightreeID

Return Object – DataWriteServiceResponse

This call is used to remove an existing PatientPayor record from an existing patient. The BrightreeID is the PatientPayor key and is available in the PatientPayor and PatientPayorInfo messages.

PatientPayorUpdate

Input Parameters – BrightreeID, PatientPayor

Return Object – DataWriteServiceResponse

This call is used to update an existing PatientPayor record for an existing patient. Note in this case the BrightreeID is the PatientPayor key and is available in the PatientPayor and PatientPayorInfo messages.

5. Patient Notes

The Patients Notes section lists the Patient Notes Operations and Service Contracts and the Patient Notes Message Definitions.

Patient Notes Operations and Service Contracts

The Patient Web Service includes operations that allow an external system to create, update, and fetch for Patient Notes.

PatientNoteCreate

Input Parameters – PatientNote

Return Object –DataWriteServiceResponse

This call is used to add a PatientNote to a patient's record. The following fields must be provided in order for the PatientNote to be saved:

- Subject: text field with a maximum of 200 characters
- Description: text field with a maximum of 8000 characters
- Status: UserTaskStatus
- Severity: UserTaskSeverity
- Reason: PatientNoteReason (available from ReferenceData service)
- State: UserTaskState
- PatientKey: Integer (BrightreeID of associated patient)

On successful save, the BrightreeID for the newly created note is returned in the DataWriteServiceResponse.

PatientNoteFetchByKey

Input Parameters – BrightreeID (of the Patient Note)

Return Object –DataFetchServiceResponse(Of PatientNote)

This call is used to fetch a single PatientNote by its BrightreeID.

PatientNoteFetchByPatient

Input Parameters – BrightreeID (of a patient)

Return Object – DataFetchServiceResponse(Of PatientNote)

This call is used to retrieve all the PatientNotes for a patient.

PatientNoteUpdate

Input Parameters – BrightreeID (of the Patient Note), PatientNote

Return Object –DataWriteServiceResponse

This call is used to update an existing PatientNote. The same fields required for PatientNoteCreate are required for PatientNoteUpdate.

6. Facility Resident

The Facility Resident section lists the Facility Resident Operations and Service Contracts and the Facility Resident Message Definitions.

Facility Resident Operations and Service Contracts

The Patient Service supports creation of a specialized type of Patient known as a FacilityResident. A facility resident is a patient with CustomerType of FacilityResident. Facility residents have much of their data defaulted to values established in a Facility Master record. This includes the following:

- Personal Data

  Billing Address, Delivery Address, Account Group, Discount Percent, Tax Zone, Branch Office, Place of Service and User Data fields.

- Clinical Data

  Ordering Doctor, Primary Doctor, Referral Contact, Referral Type and Marketing Rep.

- Insurance Data

  All insurance payors setup on Facility Master.

Patient data not defaulted can be provided by the integration point.

FacilityMasterInfoFetchAll

Input Parameters – None

Return Object – DataFetchServiceResponse(Of FacilityMasterInfo)

In support of the FacilityResidentCreate operation, this operation returns a lookup list containing the FacilityMaster names and Brightree IDs in the system

FacilityResidentCreate

Input Parameters – MasterFacilityKey, FacilityResidentInfo

Return Object –DataWriteServiceResponse

This operation is used to create a new Facility Resident within the Brightree system. Facility residents are a specialized type of patient and have much of their data defaulted to data previously established on a FacilityMaster. A subset of data not defaulted can be passed by the client in the FacilityResidentInfo object.

On a successful create, the BrightreeID of the newly created facility resident is returned as part of the DataWriteServiceResponse.