

**August 1, 2017**

Technical specification document –

SF\_Integration\_Reports

# INTRODUCTION

# Objective

Automated reports are required to show the patient details separately with below criteria

* Event is “New Patient Appointment” without any case attached.
* New Patient with incorrect Appointment event
* Patient With event “One Time Evaluation”

# Scope

The report will run from the production server (NGVRSQL)

# Functionality

SSIS package is designed for this report, below are the activities the package performs

1. **Job NP\_Appt\_With\_No\_Case**

**Step 1 -** Delete csv file from below path

[**\\hpm-fs1\Sites\Garden City\Data\SF\_Integtration\NP\_Appt\_With\_No\_case.xls**](file:///\\hpm-fs1\Sites\Garden%20City\Data\SF_Integtration\NP_Appt_With_No_case.xls)

**Step 2 –** Create Excel file on the below path

[**\\hpm-fs1\Sites\Garden City\Data\SF\_Integtration\NP\_Appt\_With\_No\_case.xls**](file:///\\hpm-fs1\Sites\Garden%20City\Data\SF_Integtration\NP_Appt_With_No_case.xls)

**Step 3 -** Fetch the data using script, and load into above created excel file

1. **Send Email**

Send rename file from “**no-reply@healthplusmgmt.com**”

To -

* [**\_rptnoapptnocase@healthplusmgmt.com**](mailto:_rptnoapptnocase@healthplusmgmt.com)
* [**tceravino@healthplusmgmt.com**](mailto:tceravino@healthplusmgmt.com)
* **mnunez@healthplusmgmt.com**

1. **Rename File**

Rename the file as per today’s date and time on below path

**\\hpm-fs1\Sites\Garden City\Data\SF\_Integtration\NP\_Appt\_With\_No\_case\_<date time>.xls**

1. **Code “SSIS Package” Attached.**



1. **Job NP\_Booked\_With\_Incrt\_Appt**

**Step 1 -** Delete csv file from below path

[**\\hpm-fs1\Sites\Garden City\Data\SF\_Integtration\NP\_Booked\_with\_Incrt\_Appt.xls**](file:///\\hpm-fs1\Sites\Garden%20City\Data\SF_Integtration\NP_Booked_with_Incrt_Appt.xls)

**Step 2 –** Create Excel file on the below path

[**\\hpm-fs1\Sites\Garden City\Data\SF\_Integtration\NP\_Booked\_with\_Incrt\_Appt.xls**](file:///\\hpm-fs1\Sites\Garden%20City\Data\SF_Integtration\NP_Booked_with_Incrt_Appt.xls)

**Step 3 -** Fetch the data using script, and load into above created excel file

1. **Send Email**

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To -

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* [**tceravino@healthplusmgmt.com**](mailto:tceravino@healthplusmgmt.com)
* **mnunez@healthplusmgmt.com**

1. **Rename File**

Rename the file as per today’s date and time on below path

**\\hpm-fs1\Sites\Garden City\Data\SF\_Integtration\NP\_Booked\_with\_Incrt\_Appt\_<Date Time>.xls**

1. **Code “SSIS Package” Attached.**



1. **Job Booked\_One\_Time\_Eval**

**Step 1 -** Delete csv file from below path

**\\hpm-fs1\Sites\Garden City\Data\SF\_Integtration\Booked\_One\_Time\_Eval.xls**

**Step 2 –** Create Excel file on the below path

**\\hpm-fs1\Sites\Garden City\Data\SF\_Integtration\Booked\_One\_Time\_Eval.xls**

**Step 3 -** Fetch the data using script, and load into above created excel file

1. **Send Email**

Send rename file from “**no-reply@healthplusmgmt.com**”

To -

* [**\_rptnoapptnocase@healthplusmgmt.com**](mailto:_rptnoapptnocase@healthplusmgmt.com)
* [**tceravino@healthplusmgmt.com**](mailto:tceravino@healthplusmgmt.com)
* **mnunez@healthplusmgmt.com**

1. **Rename File**

Rename the file as per today’s date and time on below path

**\\hpm-fs1\Sites\Garden City\Data\SF\_Integtration\Booked\_One\_Time\_Eval\_<Date Time>.xls**

1. **Code “SSIS Package” Attached.**

