



170.315(b)(10)
XML EHI Export of Patient Billing History, rel 4.0

Revision: 1.0
Revised: 11/29/2023

SCC Soft Computer
5400 Tech Data Dr
Clearwater, FL 33760

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Medical Device Intended Use Advisory

The Intended Use Advisory provided below is in compliance with Title 21 Chapter I Subchapter H Part 801 of the FDA's Code of Federal Regulations governing medical devices. This Part requires medical device manufacturers to define intended use. With regard to interface specifications reference 801.4 Meaning of intended uses, and 801.5 Medical devices; adequate directions for use.

The software supporting 170.315(b)(10) Electronic Health Information (EHI) Export has been designed, installed, and configured to meet general requirements for exchange of billing history for one or more patients. It is imperative that you consult with SCC should you require a different form of output or require interfaces to support other needs and workflows. Use of the software for any reason other than originally specified may violate the safety, effectiveness, and design controls of this medical device, and such use could result in an increased risk to users and patients.

Our priority is to provide quality health care technology to your site while ensuring that you have the best possible experience using the tools we provide. Working together with the above advisories in mind, we can prevent potential, unintended patient care issues from occurring.

Application

This specification applies to Billing performed via SoftBill or SoftAR installed with SoftLab release 4.0.

Modules: SoftBill SoftAR

Interfaces: Billing History

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Document Change Control			
Revision #	Date	Author	Main changes
1.0	11/29/2023	Ray Harms	Original Specification

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1.0 **Export Query and Output**

The EHI Billing History and associated utility for EHI Export is designed to meet two scenarios as described within 2015 Cures Update measure 170.315(b)(10) Electronic Health Information (EHI) Export:

- 1) Single Patient EHI Export - Export all EHI for a single patient at any time the user chooses.
- 2) Patient Population EHI Export - Export all EHI for a patient population

Both exports are required to:

- a) Be electronic and in a computable format
- b) Include a publicly accessible hyperlink of the export's format

Exports meeting this criteria are offered in an XML format, a common industry standard for data exchange in the form of messages. Exports are in an electronically computable format, containing a history of PHI data including history of patient billing. Data within such exports is limited to data maintained within SCC systems. Data residing externally within other systems is not included. Charge data sent to other systems for billing are not included.

Creating an Export

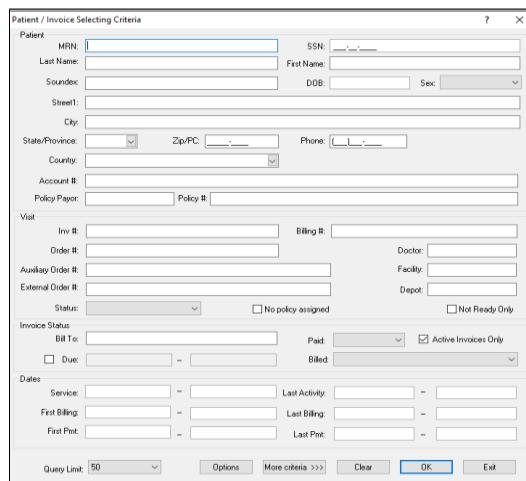
Single Patient Export

To export EHI for a single patient, follow the below step by step process in SoftAR or SoftBill.

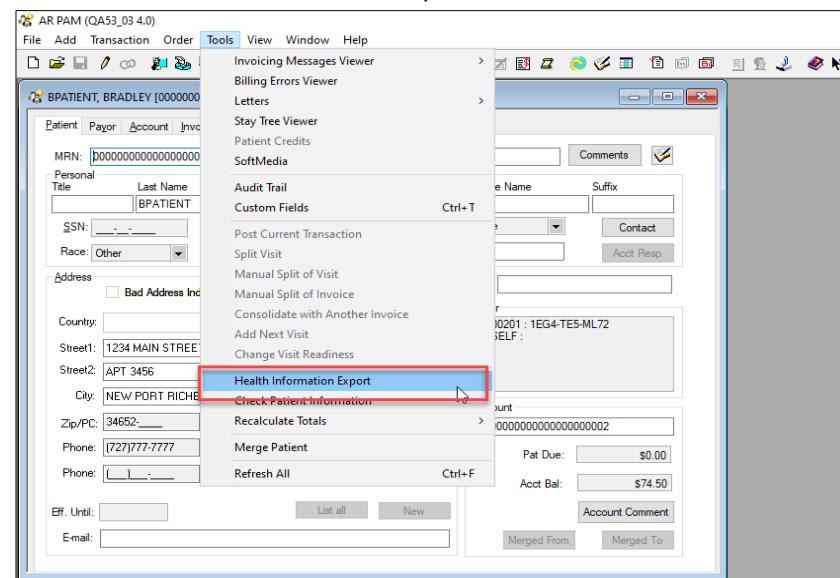
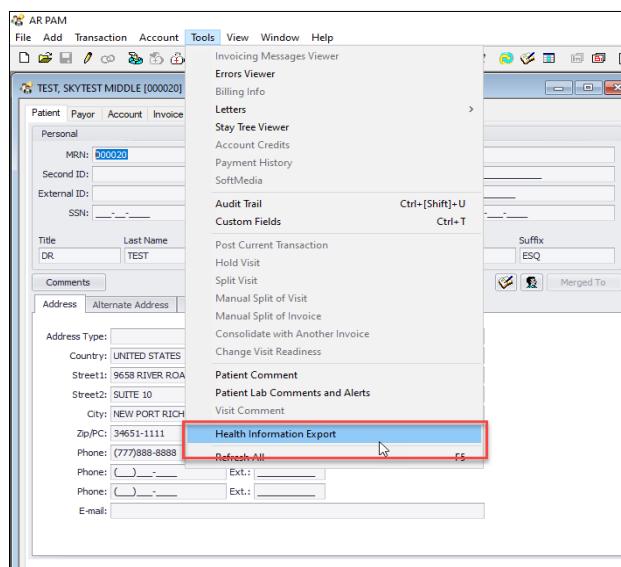
- 1) Open the Patient Account Module.



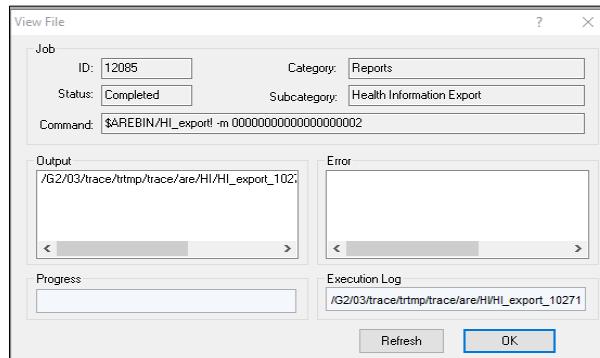
2) Select a patient within the Patient / Invoice Selecting Criteria.



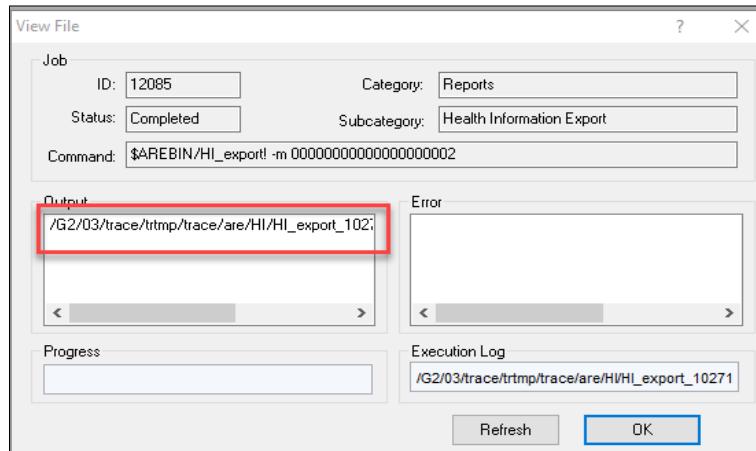
3) Once PAM opens to the selected patient, click on Tools the menu bar and then select Health Information Export.



- 4) The system will automatically initiate the Health Information Export report job within a View File dialog.



- 5) Double click on the Output within the View File dialog to view the report.



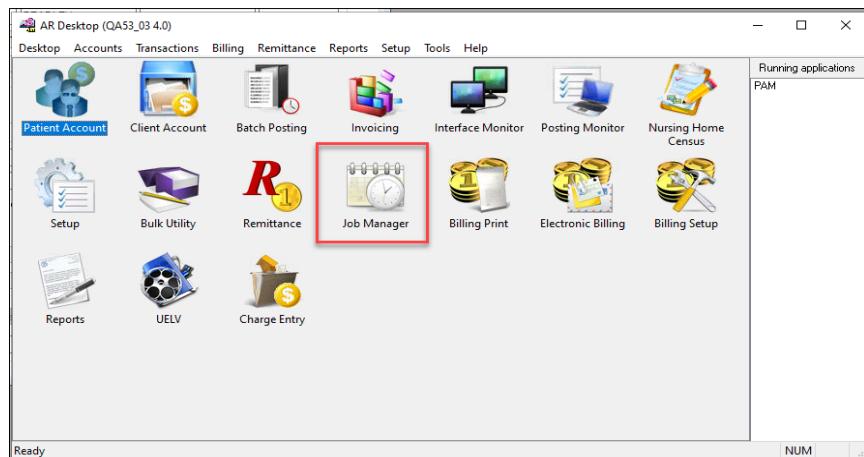
- 6) Viewing brings up the AR PrintApp window. The EHI Export file may be saved to any accessible location from here.

Bulk Patient Export

To export EHI for a batch of patients, SCC services will be required to manage the process. An export may be filtered by patient type, clinic code, or order range, or may include the full population of patients held in SCC systems. A bulk export requires management of available resources to format output messages, create and save files, and transport the data. The "Bulk" or "Patient Population" Export also follows the specifications for message structure and content detailed herein. Please contact your SCC representative to arrange for such a procedure.

Accessing a Previous Export

- 1) To view Health Information Export reports previously generated, open Job Manager.

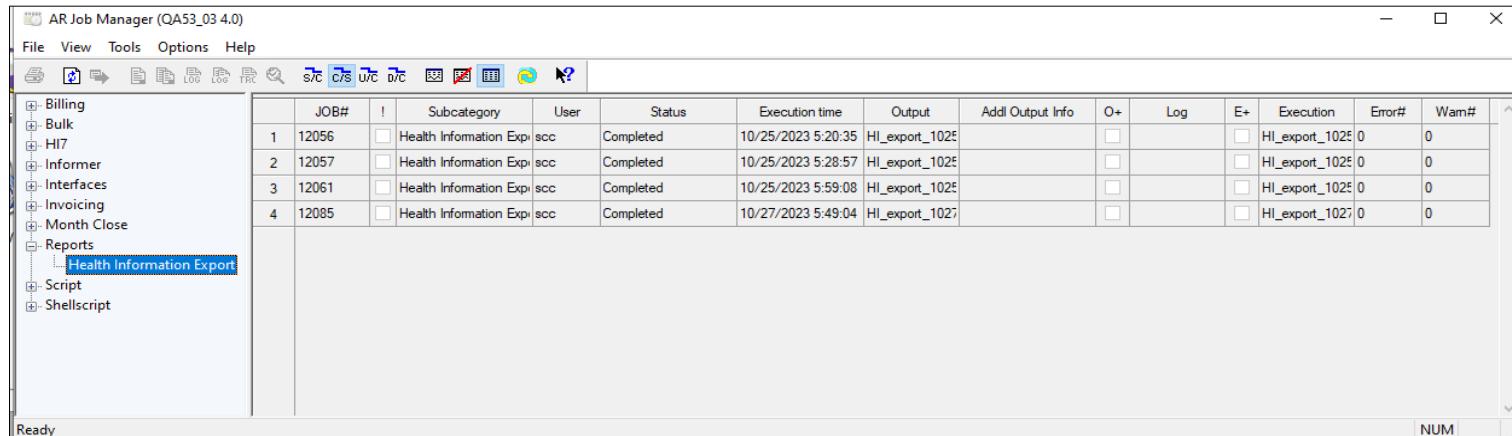


- 2) Within Job Manager, open Reports and select Health Information Export.

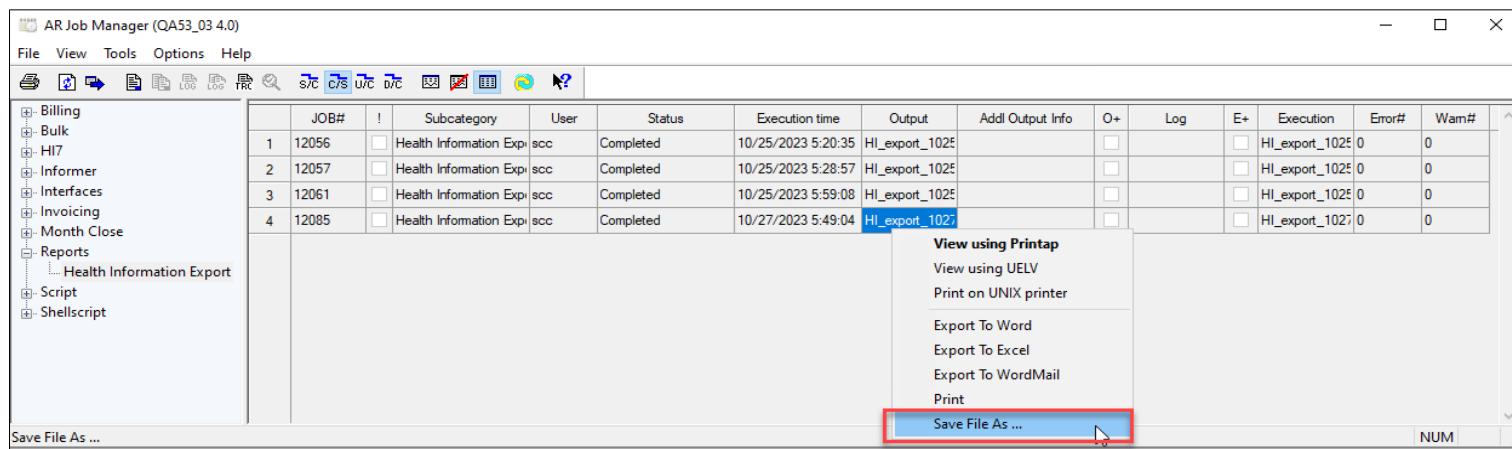
The screenshot shows the AR Job Manager interface. The menu bar includes File, View, Tools, Options, and Help. The toolbar includes standard file operations like Open, Save, Print, and Find. On the left is a tree view of job categories: Billing, Bulk, HIT, Informer, Interfaces, Invoicing, Month Close, Reports (which is expanded), Scripts, and Shellscript. Under Reports, 'Health Information Export' is selected and highlighted with a red box. The main table lists seven jobs, each with columns for JOB#, Subcategory, User, Status, Execution time, Output, Addl Output Info, O+, and Log. Job 7 is currently selected.

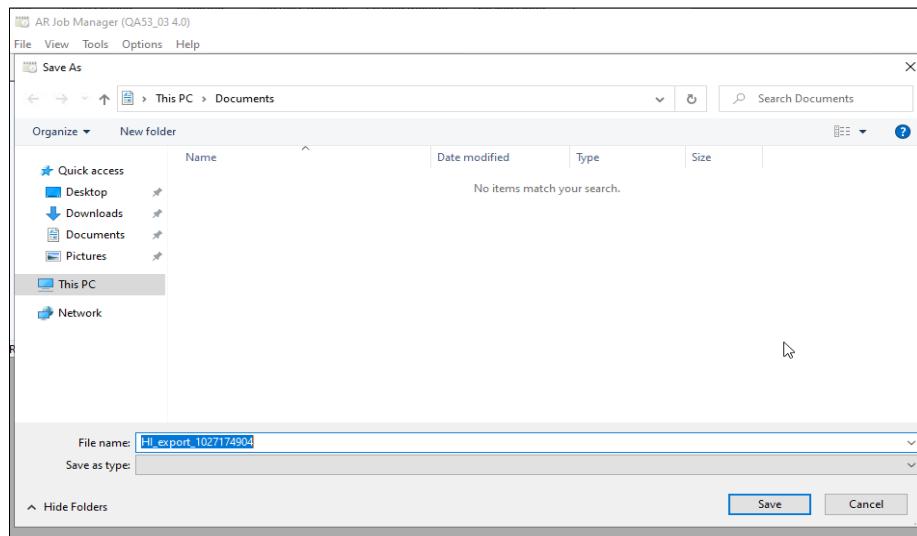
JOB#	Subcategory	User	Status	Execution time	Output	Addl Output Info	O+	Log
1 7	Print Bills	mille	Recurring/Canceled				<input type="checkbox"/>	
2 10	Print Bills	60739	Recurring/Canceled				<input type="checkbox"/>	
3 11	Print Bills	pf	Recurring/Canceled				<input type="checkbox"/>	
4 12054	Print Bills	scc	Completed	10/25/2023 5:13:1	EPIC_231025	EPIC	<input type="checkbox"/>	
5 12055	Print Bills	scc	Completed	10/25/2023 5:13:2	EPIC_231025	EPIC	<input type="checkbox"/>	
6 12059	Print Bills	scc	Errors	10/25/2023 5:55:4		e_EPIC2:	<input type="checkbox"/>	
7 12060	Print Bills	scc	Completed	10/25/2023 5:57:2	EPIC_231025	EPIC	<input type="checkbox"/>	

- 3) When Health Information Export is selected, all jobs created within the View's Cut off Date will be displayed. Double click on the Output field to view the Health Information Export.



- 4) The User can right-click within the Output field and select Save File As... to save to a user defined directory.





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1.0	Data Elements				
	Element	Type	Card	Output	Notes
Patient Information					
patientLevel					
sccMrn		String	1..1	Patient MRN	The Medical Record Number.
patientName			1..1		
lastName		String	0..1	Patient Last Name	Patient Last Name
firstName		String	0..1	Patient First Name	Patient First Name
middleName		String	0..1	Patient Middle Name	Patient Middle Name
prefix		String	0..1	Patient Name Prefix	Patient Name Title/Prefix
suffix		String	0..1	Patient Name Suffix	Patient Name Suffix
dateOfBirth		Date	0..1	Patient Date of Birth	Patient Date of Birth: YYYY-MM-DD format
sex		String	0..1	Patient Sex	Patient Sex: M = Male F = Female U = Undefined
patientAddress			0..1		
addressLine1		String	0..1	Patient Address, line 1	Patient Street Address
addressLine2		String	0..1	Patient Address, line 2	Patient Street Address - Additional
city		String	0..1	Patient Address, city	Patient's City of residence
state		String	0..1	Patient Address, state	Patient Address, State
zip		String	0..1	Patient Address, zip code	Patient Address, Zip Code
financialLevel		Record	0..*		Financial level resources
Invoice Data					
financialLevel					
encounter			1..*		
scclId		String	1..1	Invoice Number	Patient Invoice Number
date		Date	1..1	Date of Service	Date of Service for the Invoice: YYYY-MM-DD format
orderingProvider			0..1		
lastName		String	0..1	Requesting Doctor Last Name	Ordering / Requesting Doctor Last Name
firstName		String	0..1	Requesting Doctor First Name	Ordering / Requesting Doctor First Name
npild		String	0..1	Requesting Doctor NPI	Ordering / Requesting Doctor NPI
renderingProvider			0..1		
lastName		String	0..1	Performing Doctor Last Name	Performing Doctor Last Name
firstName		String	0..1	Performing Doctor First Name	Performing Doctor First Name
npild		String	0..1	Performing Doctor NPI	Performing Doctor NPI
chargeLevel		Record	0..*		Charge level resources
transLevel		Record	0..*		Transaction level resources

	Element		Type	Card	Output	Notes
Item Info						
chargeLevel						
	invoice				1..*	
	item name		Text	0..1	Item Description	<i>idx:</i> Invoice extension <i>status:</i> Active / Canceled / Posted
	cpt		String	0..1	CPT Code	CPT Code
	cdm		String	0..1	CDM Code	CDM Code
	mod i="1"		String	0..1	Modifier #1	Billing service code modifier
	mod i="2"		String	0..1	Modifier #2	Billing service code modifier
	mod i="3"		String	0..1	Modifier #3	Billing service code modifier
	mod i="4"		String	0..1	Modifier #4	Billing service code modifier
	dx i="1"		String	0..1	Diagnosis Code #1	Test level ICD10 diagnosis code
	dx i="2"		String	0..1	Diagnosis Code #2	Test level ICD10 diagnosis code
	dx i="3"		String	0..1	Diagnosis Code #3	Test level ICD10 diagnosis code
	dx i="4"		String	0..1	Diagnosis Code #4	Test level ICD10 diagnosis code
	quantity		Numeric	0..1	Quantity	Number of units
	charge		Numeric	0..1	Charge	Unit Charge amount
	paid		Numeric	0..1	Paid Amount	Item amount paid at time of export
	balance		Numeric	0..1	Balance	Item balance of invoice at time of export
	performingLab			0..1		Item Performing Laboratory details
	npild		String	0..1	Item Facility NPI	Item Performing Laboratory NPI (National Provider Identifier) number
	cliald		String	0..1	Item Facility CLIA	Item Performing Laboratory CLIA (Clinical Laboratory Improvement Amendments) number
Transaction Data						
transLevel						Transaction ID / Transaction Code representing the type of transaction (e.g. INV/Invoicing, VOID/Invoicing recalculation, BILL/Billing, etc...)
	transaction			1..*	Transaction ID / Transaction Code	<i>uid:</i> Transaction counter <i>idx:</i> Transaction extension <i>scclid:</i> User defined, such as INV=Invoicing / VOID=Invoicing recalculation / BILL=Billing
	kind		String	0..1	Kind	The financial classification of the Transaction code. The options are: CHARGE – This transaction generates revenue for the lab. PAYMENT – This transaction is used to register received payments. ADJUST – This transaction includes a financial operation that is neither a charge nor a payment transaction. ACTION – This transaction is a non-financial operation (for example, a bill).
	descr		Text	0..1	Transaction Description	The description of the transaction code.
	amount		Numeric	0..1	Amount	The Transaction Amount
	date		Date	0..1	Date	Transaction Date: YYYY-MM-DD format
	payor		String	0..1	Payor Description	Transaction Payor Description

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1.0	Example output message

```
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<Message>
  <Date>2023-10-30</Date>
  <Time>08:12:29</Time>
  <Data>
    <patientLevel>
      <sccMrn>00000000000000000002</sccMrn>
      <patientName>
        <lastName>BPATIENT</lastName>
        <firstName>BRADLEY</firstName>
        <middleName></middleName>
        <suffix></suffix>
        <prefix></prefix>
      </patientName>
      <dateOfBirth>1951-02-07</dateOfBirth>
      <sex>M</sex>
      <patientAddress>
        <addressLine1>1234 MAIN STREET</addressLine1>
        <addressLine2>APT 3456</addressLine2>
        <city>NEW PORT RICHEY</city>
        <state>FL</state>
        <zip>34652</zip>
      </patientAddress>
      <financialLevel>
        <encounter>
          <scclId>LG62500001</scclId>
          <date>2023-10-25</date>
          <orderingProvider>
            <lastName>AARONSON</lastName>
            <firstName>HADASSAH</firstName>
            <npild>1225169238</npild>
          </orderingProvider>
          <renderingProvider>
            <lastName>BARTHOLOMEW</lastName>
            <firstName>ANN</firstName>
            <npild>1356471767</npild>
          </renderingProvider>
          <chargeLevel>
            <invoice status="Active" idx="1">
              <item name="Assay of phosphorus">
```

```
<cpt>84100</cpt>
<cdm>11242922</cdm>
<mod i="1"></mod>
<mod i="2"></mod>
<mod i="3"></mod>
<mod i="4"></mod>
<dx i="1">A00.9</dx>
<dx i="2">A03.8</dx>
<dx i="3">B00.7</dx>
<dx i="4">B00.50</dx>
<quantity>1</quantity>
<charge>39.00</charge>
<paid>0.00</paid>
<balance>32.00</balance>
<performingLab>
  <npild></npild>
  <claid>12D4567890</claid>
</performingLab>
</item>
<item name="Assay of creatinine">
  <cpt>82565</cpt>
  <cdm>11242732</cdm>
  <mod i="1"></mod>
  <mod i="2"></mod>
  <mod i="3"></mod>
  <mod i="4"></mod>
  <dx i="1">A00.9</dx>
  <dx i="2">A03.8</dx>
  <dx i="3">B00.7</dx>
  <dx i="4">B00.50</dx>
  <quantity>1</quantity>
  <charge>51.00</charge>
  <paid>0.00</paid>
  <balance>42.50</balance>
  <performingLab>
    <npild></npild>
    <claid>12D4567890</claid>
  </performingLab>
</item>
</invoice>
</chargeLevel>
<transLevel>
  <transaction sccid="INV" idx="1" uid="71">
    <kind>CHARGE</kind>
    <descr>Invoicing</descr>
```

```
<amount>90.00</amount>
<date>2023-10-25</date>
<payor scclId="00201">MEDICARE</payor>
</transaction>
<transaction scclId="BILL" idx="1" uid="72">
<kind>ACTION</kind>
<descr>Billed to 00201</descr>
<amount>90.00</amount>
<date>2023-10-25</date>
<payor scclId="00201">MEDICARE</payor>
</transaction>
<transaction scclId="CK" idx="1" uid="73">
<kind>PAYMENT</kind>
<descr>CHECK PAYMENT</descr>
<amount>-15.50</amount>
<date>2023-10-25</date>
<payor scclId="00201">MEDICARE</payor>
</transaction>
</transLevel>
</encounter>
</financialLevel>
</patientLevel>
</Data>
</Message>
```