

# Basic Guide and Commonly Used APIs

---

Updated March 2024 / 11.3 C9 Release

## Contents

API BASIC GUIDE .....	3
Agreement Requirements.....	3
New Vendor or Third-Party Requests .....	3
Testing Access and When .....	4
Production (Live) Access and When.....	4
Additional Documentation.....	5
Pushing Data .....	5
Formatting .....	5
Request Format.....	5
Response Format (Error).....	5
Response Format (Success).....	6
Request Parameter / Response Value .....	6
Data Formats.....	6
Error Messages.....	7
GET .....	8
GetAdjustments .....	8
GetAdjustmentsByDateRange .....	8
GetAgingReportData .....	9
GetAllReferralContactInfo.....	10
GetAppointmentClasses .....	10
GetAppointmentClassTypes.....	11
GetAppointmentListByDate .....	11
GetAppointmentListByPatient .....	12
GetAppointmentListSince .....	13
GetAppointmentsByDate .....	14
GetAppointmentStatusDescriptions .....	15
GetAppointmentTypes.....	15

GetBirthdayList .....	16
GetChairSchedules.....	16
GetContactInfoTypes .....	17
GetContracts.....	17
GetContractsByStartDate .....	18
GetContractsCompletedByDateRange .....	18
GetContractStartsByDateRangeData.....	19
GetDeclines.....	20
GetEmployees.....	20
GetEmployers .....	21
GetExpiringCreditCards .....	22
GetFeeSchedule .....	22
GetFeeScheduleTypes .....	23
GetFeeScheduleEntries.....	23
GetFirstDismissedAppointments .....	24
GetInsuranceCompanies.....	24
GetInsuranceContracts .....	24
GetInsurancePolicies .....	25
GetInsurancePoliciesForPatient .....	25
GetIsFamilyPartyList .....	26
GetLastDismissedAppointments .....	26
GetLedger .....	27
GetLocations .....	29
GetLocationsContactInfo .....	29
GetNextVisits .....	29
GetNoShowList .....	30
GetOnlineReservations .....	30
GetPatient.....	31
GetPatientAddress.....	31

## 11.2 C9 Release

Updated March 2024 – SM 11.3 C9 Release  
cloud9.integrations@planetdds.com

GetPatientAppointmentDetails .....	32	GetResponsiblePartyAgingData.....	46
GetPatientAppointments.....	32	GetResponsiblePartyBalance.....	47
GetPatientCommentIconList.....	33	GetResponsiblePartyEmail .....	47
GetPatientEmail .....	33	GetResponsiblePartyEmailByPatient .....	48
GetPatientForEdit .....	33	GetResponsiblePartyList.....	48
GetPatientHistory .....	34	GetResponsiblePartyPhone .....	49
GetPatientInformation.....	35	GetScheduleViewColumnList.....	49
GetPatientInsurancePolicies .....	36	GetScheduleViewList .....	50
GetPatientList .....	37	GetSchoolList .....	50
GetPatientPhone.....	38	GetSmsCarriers .....	50
GetPatientRelationshipContactInfo .....	38	GetSoonerIfPossibleAppointments .....	51
GetPatientResponsiblePartyLinks .....	39	GetStaff.....	51
GetPatientsContinuingCare .....	39	GetStaffContactInfo.....	52
GetPatientStatuses .....	39	GetTransactionTypeList .....	52
GetPayments.....	40	GetVersion .....	53
GetPortalPatientLookup .....	40	SET .....	54
GetPostalCodes.....	41	SetAppointment .....	54
GetProductionByDateRange .....	41	SetAppointmentInsuranceVerified .....	54
GetRecallListByDate .....	42	SetAppointmentStatusCanceled.....	55
GetReceiptsByDateRange .....	42	SetAppointmentStatusConfirmed .....	55
GetReferralLinkData.....	43	SetPatient .....	55
GetReferrals .....	44	SetPatientComment .....	57
GetRelationshipTypeList .....	44	SetPatientDemographicInfo .....	59
GetResponsiblePartiesForPatient .....	44	SetPerson.....	60
GetResponsiblePartiesPhoneForPatient.....	45	SetPersonDemographicInfo.....	61
GetResponsiblePartyAddress.....	46	SetPersonRelationship.....	62

## API BASIC GUIDE

The Cloud 9 Software integration web service allows authorized vendors, third parties, and clients access to collect data associated with various Cloud 9 Software data. This document serves as a basic guide on how to utilize the APIs; however, note that this is not all inclusive and additional needs may be addressed on other procedures. For questions or concerns regarding the integrations process, please contact the integrations department at [cloud9.integrations@planetdds.com](mailto:cloud9.integrations@planetdds.com)

### Agreement Requirements

MNDA (Mutual Non-Disclosure Agreement):

- This agreement must be executed prior to the receipt of any documentation. Required for each individual party's access, including but not limited to vendor prospects, third parties, subcontractors, and clients.

Integration Agreement:

- This agreement must be executed prior to entering a testing state with Cloud 9 Software, receiving a sandbox environment, or any confidential data.
- Required for all parties who will be responsible for accessing Cloud 9 Software data via API, including but not limited to vendor prospects, third parties, subcontractors, and clients.
- This agreement designates the type of integration whether distributing services to one or more Cloud 9 Software clients.

Authorization Form:

- For every client database requested for access, the client must sign an authorization form prior to the release of credentials.

### New Vendor or Third-Party Requests

Every vendor relationship or third-party request is researched thoroughly, then based on client interest and development needs, Cloud 9 Software stakeholders will make the decision to move forward or not. Please note that there are initial and monthly recurring integration fees associated with any Cloud 9 Software API integration.

Upon approval and execution of all required agreements:

- A test environment (sandbox) will be established and opened for vendor or third-party testing.
- Communication between the vendor or third-party and the Cloud 9 integrations department will continue during this phase. Upon the opening of the testing environment, the vendor is expected to have a working integration ready for production access within 6 months. If an additional 3-6 months is required, approval must be requested and received from the Cloud 9 integrations department.
- Once the vendor or third-party is comfortable with the integrated services and confirms they are "client-ready", a demo will be scheduled. The demo will be presented by the vendor or third-party to Cloud 9 Software before production release to any client. Note that the service must be approved by Cloud 9 Software before moving further in this process.

- The second stage is referred to as “beta”, in which the authorized party will have access to a small number of mutual clients who have authorized the service in a live, production environment.
- The beta client(s), vendor (or third party), and the Cloud 9 integrations department will work closely to adjust or resolve any issues that come to light during the beta process. The timeframe goal in beta is within a month if problems do not persist.
- After beta sign-off, the vendor or third-party will then be considered a live relationship with Cloud 9 Software and will have the ability to sell their service(s) to any ortho Cloud 9 Software client.

### Testing Access and When

The authorized vendor or third-party will have access to the API endpoint 24/7 for alpha testing with the exception of minimal but required maintenance windows.

Testing Endpoint: <https://us-ea1-partnertest.cloud9ortho.com/GetData.ashx>

The vendor or third-party will be given one endpoint and one sandbox environment for testing purposes in the form of a Client ID (GUID). A static username and password associated with the integration will be provided.

Once the sandbox or test environment is no longer needed or has been inactive for 3 months (after beta), the sandbox will be inaccessible. A request for reactivation can be sent to the integrations department via email.

If a sandbox is inactive for 6 months (and the vendor or third-party is still in testing), the sandbox will be deactivated. A request for reactivation can be sent to the integrations department via email and a fee for reactivation will apply.

### Production (Live) Access and When

All authorized vendors or third parties will have access to Cloud 9 APIs for 7 days a week between the hours of 12:00:00 AM – 11:00:00 AM UTC. Keep in mind that if the vendor or third-party utilizes their own time zone in the code, daylight savings time could have an impact on the allotted 11-hour window as UTC time does not change.

API calls needed outside of the above-mentioned 11-hour window are not guaranteed and will require the business case (service need) and required data (minimum needs, not API calls) to be submitted to the Cloud 9 integrations department.

There is a separate document (available upon request) detailing the allowable procedures for daytime (production hours) access for APIs that are already approved.

Production Endpoint: <https://us-ea1-partner.cloud9ortho.com/GetData.ashx>

The vendor or third-party must have the ability to update any number of URLs (databases) for each client. Each database will have a unique Client ID (GUID). A static username and password associated with the integration will be provided.

## Additional Documentation

There are additional documents that are available upon request or delivered to a vendor or third-party based on the scope of an existing integration or enhancement to an integration. Generally, these documents consist of API related material that align with a vendor or third-party's Integration Agreement with Cloud 9 Software. Please reach out to the integrations team to discuss access.

- Allowable APIs During Production Hours
- Converting Person with SetPatient
- Document Uploads
- Insurance Claim APIs
- New Patient Online Scheduling Process

## Pushing Data

Some additional pushback (SET) capabilities have been added for vendor or third-party access. Before a vendor or third-party can add these capabilities, they must be coded, tested, and a demo must be presented to the Cloud 9 integrations department for approval. Please reach out to the Cloud 9 integrations department to discuss access and whitelisting.

**Note:** If a vendor or third-party plans to integrate a new patient online scheduling service, please reach out to the Cloud 9 integrations team for a recommended process workflow.

## Formatting

The web service APIs require the ability to send and receive HTTP POST requests containing XML in the body. Placeholders are denoted with square brackets [ ] containing the placeholder's description.

### Request Format

```
<?xml version="1.0" encoding="utf-8" ?>
<GetDataRequest xmlns="http://schemas.practica.ws/cloud9/partners/"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <ClientID>[Cloud9 Client GUID]</ClientID>
  <UserName>[Partner UserName]</UserName>
  <Password>[Partner Password]</Password>
  <Procedure>[Procedure Name]</Procedure>
  <Parameters>
    [List of Parameters]
  </Parameters>
</GetDataRequest>
```

### Response Format (Error)

```
<?xml version="1.0" encoding="utf-8" ?>
<GetDataRequest xmlns="http://schemas.practica.ws/cloud9/partners/"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <ResponseStatus>Error</ResponseStatus>
  <ErrorCode>[Error Code]</ErrorCode>
  <ErrorMessage>[Error message]</ErrorMessage>
</GetDataResponse>
```

## Response Format (Success)

```
<?xml version="1.0" encoding="utf-8" ?>
<GetDataRequest xmlns="http://schemas.practica.ws/cloud9/partners/"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance">
  <ResponseStatus>[Status of request]</ResponseStatus>
  <Records>
    [List of records]
    <Record>
      [List of record values]
    </Record>
  </Records>
</GetDataResponse>
```

## Request Parameter / Response Value

**Note:** The tag name matches the parameter name or response value name. If the containing value is null, it will be denoted via the “xsi:nil” attribute shown below.

Null value:

```
<dtBirthdate xsi:nil="true" />
```

Normal value:

```
<dtBirthdate>12/30/1999 12:00:00 AM</dtBirthdate>
```

## Data Formats

Data Type	Value
bit	1 (True) / (0) False
char	GUID - 59D26B3E-2725-460D-9FD7-BD9C03452B86
date	12/30/1999 12:00:00 AM or 12/30/1999
datetime	12/30/1999 12:00:00 AM
int	Binary value
integer	Binary value
money	Binary value, Decimal Amount
nvarchar	GUID - 59D26B3E-2725-460D-9FD7-BD9C03452B86
string	Normal text embedded in tag
tinyint	Binary value
uniqueidentifier	GUID - 59D26B3E-2725-460D-9FD7-BD9C03452B86
varchar	GUID - 59D26B3E-2725-460D-9FD7-BD9C03452B86

**Note:** GUIDs are only guaranteed to be unique for each Cloud 9 client that vendors or third parties are pulling data from. GUIDs can be and sometimes purposefully shared across multiple databases. Please ensure there is a plan in place if data is being stored across multiple databases.

## Error Messages

Below is a list of general error messages returned. Some APIs have specific error messages returned.

Error Value	Error Message
0	An unknown error occurred.
1	Invalid client / username / password combination.
2	A required parameter was not specified.
3	Invalid value for parameter: '[Parameter Name]'.
4	Invalid request input.
5	Invalid GUID format for parameter: '[Parameter Name]'
6	Not authorized to access client.
7	Not authorized to collect data outside of allowance window.
8	Too many requests within the timeframe for procedure < >
9	Procedure < > not whitelisted for partner / client. The current allowance window for non-whitelisted procedures is < > - < >.
10	Procedure '{0}' is not authorized.
11	Token is unknown or has expired.
12	There is an import already in progress.
13	Storage is not configured for this client.

**Note:** An additional error message of “BAD RESPONSE: HTTP/1.1 500 Server Error” will be returned if the incorrect API endpoint for a specific client.

## GET

### GetAdjustments

**Description:** Returns all financial adjustments from a date since or within a date range.

Parameter Name	Type	Length	Is Required	Notes
StartDateParam	datetime		1	Functions as date since
EndDateParam	datetime		0	
BreakByParam	int		0	Defaults to 1
Data Returns				
Data Returns				Notes
Date				
Patient				
PatientID				
ResponsibleParty				
InsuranceCompany				
TransactionType				
Amount				
Orthodontist				
Location				
BreakByValue				
ReportCategory				

### GetAdjustmentsByDateRange

**Description:** Returns all financial adjustments except 'Transfer to Payment Plan' system adjustments for contract creation.

Parameter Name	Type	Length	Is Required	Notes
StartDate	datetime		1	
EndDate	datetime		1	
LocationGuids	nvarchar	max	0	Values separated by ' '
ProviderGuids	nvarchar	max	0	Values separated by ' '
BreakBy	int		0	1=Patient Location, 2=Provider, 0=none
ShowOpenItems	bit		0	Defaults to 0
Data Returns				
Data Returns				Notes
ID				
DateTime				
TransactionType				
PatientName				
PatientID				
ResponsiblePartyName				
Amount				
Note				
InsuranceCompany				
PatientLocation				
Provider				



IsOpenItem	
BreakByValue	
<b>Note(s):</b> - This API cannot return multiple discount amounts, shown as Adjustments.	

## GetAgingReportData

**Description:** Returns aging for responsible party and insurance companies; broken out by patients.

Parameter Name	Type	Length	Is Required	Notes
AgeOfBalance	int		1	0 = Due Now, 10 = Over 10, 30 = Over 30, 60 = Over 60, 90 = Over 90, 120 = Total Due
AmountOfBalance	money		1	
IncludeInsuranceBalances	bit		0	
IncludeResponsiblePartyBalances	bit		1	
CreditsOnly	bit		1	
AsOfDate	datetime		1	
LocationGuids	nvarchar	max	0	
ShowZeroAccounts	bit		0	
UseCurrent	bit		0	
ProviderGuids	nvarchar	max	0	Values separated by ' '
InsuranceBillingCenters	nvarchar	max	0	Values separated by ' '
Data Returns				Notes
patGUID				
ppGUID				
pipGUID				
persGUID				
persGUIDResponsible				
PatientName				
ResponsiblePartyName				
icbcGUID				
InsuranceCompanyName				
ContactInfo				
LastPaymentDate				
LastPaymentAmount				
CurrentDue				
Over10Due				
Over30Due				
Over60Due				
Over90Due				
DueNow				
FutureDue				
TotalDue				
Over90Count				
Over60Count				

Over30Count	
CurrentDueCount	
ResponsiblePartyCount	
InsuranceCompanyCount	
patID	
<b>Note(s):</b> - Filtering for <InsuranceBillingCenters> requires that <IncludeInsuranceBalaces> is set to True (1) <IncludeInsuranceBalances>1</IncludeInsuranceBalances> <InsuranceBillingCenters>e3dac312-bd8d-406b-b775-2bbf46c29093</InsuranceBillingCenters>	

## GetAllReferralContactInfo

**Description:** Returns all referral contact information in setup for Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
<b>Data Returns</b>				<b>Notes</b>
persLastName				
PointOfContactName				
EmployedBy				
ReferralGUID				
isPerson				
ReferralContactInfoType				
ReferralContactInfo				
ReferralContactInfoTypeGroup				
ReferralStreet				
ReferralCity				
ReferralState				
ReferralPostalCode				

## GetAppointmentClasses

**Description:** Returns details for all appointment classes (including minutes) in setup for Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
ShowDeleted	bit		1	
<b>Data Returns</b>				<b>Notes</b>
apptclsCode				
apptclsDescription				
apptclsMinutes				
apptclsDeleted				

## GetAppointmentClassTypes

**Description:** Returns details for all appointment classes setup in Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
ClassCodeSearch	nvarchar	50	0	
TypeGUIDFilter	nvarchar	50	0	
Data Returns				Notes
apptclsDescription				
apptclsCode				
apptclsGUID				
appttypeDescription				
appttypeCode				
AppttypeGUID				
appttypeAllowOnlineScheduling				

## GetAppointmentListByDate

**Description:** Returns details for scheduled appointments on a specific date or within a date range.

Parameter Name	Type	Length	Is Required	Notes
dtAppointment	datetime		1	
dtAppointmentEnd	datetime		0	
pageIndex	int		0	Defaults to 1 if is not sent or if it is less than 1
pageSize	int		0	Defaults to 1000 if it is not sent or if it is less than 0 or greater than 1000
locGUIDs	varchar	max	0	Values separated by ','
Data Returns				Notes
AppointmentGUID				
PatientGUID				
PatientTitle				
PatientFirstName				
PatientMiddleName				
PatientLastName				
PatientSuffix				
PatientGreeting				
PatientGender				
AppointmentDateTime				
OrthodontistGUID				
OrthodontistCode				
OrthodontistName				
LocationGUID				
LocationCode				
LocationName				
AppointmentTypeGUID				
AppointmentTypeDescription				

AppointmentNote	
AppointmentMinutes	
AppointmentStatusDescription	
AppointmentConfirmation	
AppointmentIsConfirmed	
PatientStreetAddress	
PatientCity	
PatientState	
PatientPostalCode	
ContactInfo	
CreatedDateTime	
<b>Note(s):</b> - Duplicate <AppointmentGUID> will return if a patient has multiple addresses listed.	

## GetAppointmentListByPatient

**Description:** Returns all appointment details for a specific patient.

Parameter Name	Type	Length	Is Required	Notes
patGUID	uniqueidentifier		1	No Partner Portal use today.
Data Returns				Notes
AppointmentGUID				
PatientGUID				
PatientTitle				
PatientFirstName				
PatientMiddleName				
PatientLastName				
PatientSuffix				
PatientGreeting				
PatientGender				
AppointmentDateTime				
OrthodontistGUID				
OrthodontistCode				
OrthodontistName				
LocationGUID				
LocationCode				
LocationName				
AppointmentTypeGUID				
AppointmentTypeDescription				
AppointmentNote				
AppointmentMinutes				
AppointmentStatusDescription				
AppointmentConfirmation				

## GetAppointmentListSince

**Description:** Returns any appointment that has been modified or scheduled with <dtSince>.

Parameter Name	Type	Length	Is Required	Notes
dtSince	datetime		1	
pageIndex	int		0	Defaults to 1 if is not sent or if it is less than 1
pageSize	int		0	Defaults to 1000 if it is not sent or if it is less than 0 or greater than 1000
locGUIDs	varchar	max	0	Values separated by ','
Data Returns				Notes
AppointmentGUID				
PatientGUID				
PatientTitle				
PatientFirstName				
PatientMiddleName				
PatientLastName				
PatientSuffix				
PatientGreeting				
PatientGender				
AppointmentDateTime				
OrthodontistGUID				
OrthodontistCode				
OrthodontistName				
LocationGUID				
LocationCode				
LocationName				
AppointmentTypeGUID				
AppointmentTypeDescription				
AppointmentNote				
AppointmentMinutes				
AppointmentStatusDescription				
AppointmentConfirmation				
AppointmentIsConfirmed				
PatientStreetAddress				
PatientCity				
PatientState				
PatientPostalCode				
ContactInfo				
ScheduleViewColumnGUID				
Chair				

## GetAppointmentsByDate

**Description:** Returns appointment details for a specific data and schedule view.

Parameter Name	Type	Length	Is Required	Notes
dtAppointment	datetime		1	
schdvwGUID	nvarchar	50	1	
bitSortAlpha	tinyint		0	Alphabetical sort by <persLastFirst>
bitSortByPatientId	tinyint		0	Numerical sort by Patient ID
Data Returns				Notes
apptstDescription				
AppointmentGUID				
PatientTitle				
PatientFullName				
PatientID				
AppointmentDateTime				
LocationGUID				
LocationName				
AppointmentTypeGUID				
AppointmentTypeDescription				
PatientBirthday				
PatientModels				
Chair				
Current				
PastDue				
DueNow				
TotalDue				
BirthdayMonth				
Adult				
BirthdayMonthDescription				
BirthdayDescription				
MonthsInStatus				
PatientStatusCode				
FullMonthsDetail				
persLastFirst				
apptNote				

## GetAppointmentStatusDescriptions

**Description:** Returns all appointment statuses setup in Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
AppointmentStatusGuids	nvarchar	max	0	Values separated by ' '
showDeleted	bit		0	
Data Returns				Notes
apptstDescription				
apptstCode				
apptstGUID				

## GetAppointmentTypes

**Description:** Returns all appointment types in setup for Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
showDeleted	bit		1	
Data Returns				Notes
AppointmentTypeGUID				
AppointmentTypeCode				
AppointmentTypeDescription				
AppointmentTypeMinutes				
AppointmentTypeDeleted				
AppointmentTypeGaidgeCode				
AppointmentTypeAllowOnlineScheduling				

## GetBirthdayList

**Description:** Returns a list of patients with birthdates that fall on a designated month/day.

Parameter Name	Type	Length	Is Required	Notes
dtBirthday	datetime		1	
Data Returns				Notes
PatientGUID				
PatientTitle				
PatientFirstName				
PatientMiddleName				
PatientLastName				
PatientSuffix				
PatientBirthday				
PatientGender				
PatientContactInfo				
PatientContactInfoType				
PatientStreetAddress				
PatientCity				
PatientState				
PatientPostalCode				
<b>Note(s):</b> - Duplicate patient returns will occur based on the number of different addresses and contact information listed.				

## GetChairSchedules

**Description:** Returns chair schedule setup details in Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
locGUID				
locName				
schdvwGUID				
schdvwDescription				
schdvwStartTime				
schdvwEndTime				
schdcolGUID				
schdcolDescription				
svcOrder				
<b>Note(s):</b> - Abbreviations: loc=location, schdvw=schedule view, schdcol=schedule column, svc=schedule view column				



## GetContactInfoTypes

**Description:** Returns a list for available Contact Info Types and associated groups in setup for Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
ShowDeleted	bit		1	
Data Returns				Notes
ContactInfoDescription				
ContactInfoGroup				
ContactInfoDeleted				

## GetContracts

**Description:** Returns contract details for responsible parties.

Parameter Name	Type	Length	Is Required	Notes
locGUIDAssigned	uniqueidentifier		0	
fromDate	date		0	
toDate	date		0	
isActive	bit		0	
Data Returns				Notes
ContractGUID				
ContractAmount				
RelationshipGUID				
ResponsiblePartyGUID				
PatientGUID				
NextPaymentAmount				
NextPaymentDate				
TotalNumberOfPayments				
TotalNumberOfFuturePayments				
LastPaymentAmount				
LastPaymentDate				
RemainingBalance				
tfpGUID				
FrequencyDescription				
<b>Note(s):</b> <ul style="list-style-type: none"> <li>- The default return if no parameters are passed in should continue to return only the active RP plans (isActive=1).</li> <li>- Records are ordered by the plan start date and filtered based on parameters specified:</li> <li>- locGUIDAssigned - if specified, only return plans for contracts with that location guid for the contract's assigned location</li> <li>- fromDate - if specified, only return plans for contracts started on or after this date</li> <li>- toDate - if specified, only return plans for contracts started on or before this date</li> </ul>				

- isActive - if specified, 1 = only return plans for contracts in an "Active" status, 0 = only return plans for contracts in a "New" status

## GetContractsByStartDate

**Description:** Returns details for started contracts within a date range by assigned location.

Parameter Name	Type	Length	Is Required	Notes
Locations	nvarchar	max	1	Values separated by ' ' (locGUID)
StartDate	datetime		1	
EndDate	datetime		1	End date will go thru the end of the day (11:59:59pm) on the date specified.
Data Returns				Notes
ContractGUID				
TotalFee				
Discount				
FeeAfterDiscount				
FeeTypeDescription				
DiscountTypeDescription				
ContractStatus				
ContractStartDate				
PatientLastFirst				
Location				
PatientGUID				
TotalDownPayments				
TotalInsuranceDownPayments				
PaymentArrangementGUID				
TransactionTypeOriginofStartGUID				
ContractTypeGUID				
<b>Note(s):</b> - The <Locations> parameter filters contracts based on the Posting Location - Discount and Fee After Discount is now based off of total discount amounts since there are now multiple discounts on contracts. Discount Type Description will say *Multiple if there are multiple discounts; otherwise, it returns the discount type.				

## GetContractsCompletedByDateRange

**Description:** Returns details for completed contracts within a date range by assigned location.

Parameter Name	Type	Length	Is Required	Notes
dtStart	datetime		1	
dtEnd	datetime		1	
Locations	nvarchar	max	1	
Data Returns				Notes
TotalFee				

Discount	
FeeAfterDiscount	
FeeTypeDescription	
DiscountTypeDescription	
PatientName	
ResponsiblePartyName	
ContractStartDate	
NumberOfPayments	
FinalContractChargeDate	
FinalContractChargeAmount	
IsAutoPay	
AutoPayAmount	
Location	
<b>Note(s):</b> - Discount and Fee After Discount is now based off total discount amounts since there are multiple discounts on contracts. Discount Type Description will say *Multiple if there are multiple discounts, otherwise it returns the discount type.	

### GetContractStartsByDateRangeData

**Description:** Returns contract starts within a date range by assigned location.

Parameter Name	Type	Length	Is Required	Notes
StartDate	datetime		1	
EndDate	datetime		1	
LocationGUIDs	nvarchar	max	0	Values separated by ' '
ProviderGUIDs	nvarchar	max	0	Values separated by ' '
BreakBy	int		1	0 = Location, 1 = Provider
Data Returns				Notes
tfpGUID				
patGUID				
TotalFee				
FeeTypeDescription				
ContractStartDate				
PatientLastFirst				
PatientStatus				
PatientID				
TreatmentCoordinator				
IsCaseStart				
BreakByValue				

## GetDeclines

**Description:** Returns a list of all declined payments.

Parameter Name	Type	Length	Is Required	Notes
StartDateParam	datetime		0	
EndDateParam	datetime		0	
AutoPayTypeParam	int		0	0=Credit Card, 1=Bank(ACH), 2=Post Dated Check, 3=Manual
LocationsParam	nvarchar	max	0	
RankParam	nvarchar	10	0	
Data Returns				Notes
PatientName				
PatientSortName				
ResponsiblePartyName				
ResponsiblePartySortName				
Reference				
Routing				
TransactionDateTime				
ApprovalCode				
Amount				
CardType				
Expiration				
transNote				
patGUID				
RPGUID				
AutoPayType				
DeclineCode				
Rank				

## GetEmployees

**Description:** Returns details for all employees in setup for a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
showDeleted	bit		1	
Data Returns				Notes
empGUID				
empCode				
persTitle				
persLastFirst				
persFirstName				
persLastName				
persMiddleName				
persBirthdate				

emptyDescription	
empDeleted	

## GetEmployers

**Description:** Returns details for all employer plans for insurance in setup for a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
isDeleted	bit		1	
<b>Data Returns</b>				<b>Notes</b>
orgName				
oipGUID				
orgGUID				
orgParentGUID				
icbcGUID				
oipName				
oipOldIDInt				
oipLastModified				
oipGroupNumber				
oipInitialFormRequired				
oipContinuationFormsRequired				
fsGUID				
oipIndividualDeductible				
oipIndividualAnnualMax				
oipFamilyDeductible				
oipFamilyAnnualMax				
oipIndividualOrthoDeductible				
oipIndividualOrthoMax				
oipReplaceMissingTeeth				
oipLifetimeMax				
oipInNetwork				
oipPayOutOfNetwork				
oipBenefitRenewal				
oipDeleted				
oipTrackingFormsRequired				
oipBillingFrequency				
oipDownPaymentAmount				
oipDownPaymentAmountType				
oipSubmissionType				
addStreet				
pcodCity				
pcodState				
pcodCode				
orgDeleted				

## GetExpiringCreditCards

**Description:** Returns details for expired credit cards.

Parameter Name	Type	Length	Is Required	Notes
StartDate	datetime		1	
EndDate	datetime		1	
locGUID	nvarchar	max	0	
excludeZeroTotalDue	bit		0	
excludeZeroFutureDue	bit		0	
Data Returns				Notes
PatientID				
patGUID				
PatientName				
PatientSortName				
ResponsiblePartyName				
ExpirationDate				
CardType				
CardNumber				
ContactInfo				
TotalDue				
FutureDue				
Rank				

## GetFeeSchedule

**Description:** Returns details for a specific fee schedule setup on a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
fsGUID	uniqueidentifier		1	
Data Returns				Notes
FeeSchedule				
Type				
UseChargeable				
UsePatient				
IsUCR				
Procedure				
CDTCategory				
CDTCode				
Location				
Allowable				
Chargeable				
PatientCopay				

## GetFeeScheduleTypes

**Description:** Returns setup details for all fee schedules set up on a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
none			--	
Data Returns				Notes
fstGUID				
fstDescription				
fstIsUCR				
fstUseChargeable				
fstUsePatient				
fstDefaultToUCR				
fstDeleted				
fstCode				

## GetFeeScheduleEntries

**Description:** Returns a list of all fee schedule entries for transaction types setup for a specific fee schedule.

Parameter Name	Type	Length	Is Required	Notes
fsGUID	uniqueidentifier		1	
Data Returns				Notes
fseGUID				
fsGUID				
ttypGUID				
fseAmount				
locGUID				
fseChargeableAmount				
fsePatientAmount				
empGUIDProvider				

## GetFirstDismissedAppointments

**Description:** Returns a list of first dismissed appointments by patient.

Parameter Name	Type	Length	Is Required	Notes
ExcludeInactive	bit		1	
Data Returns				Notes
PatientGUID				
PatientID				
AppointmentDate				
AppointmentTypeCode				
AppointmentTypeGUID				

## GetInsuranceCompanies

**Description:** Returns a list of insurance billing centers found in setup on a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
showDeleted	bit		1	
Data Returns				Notes
InsuranceBillingCenterGUID				
InsuranceBillingCenterName				
InsuranceCompanyName				
InsuranceBillingCenterStreetAddress				
InsuranceBillingCenterCity				
InsuranceBillingCenterState				
InsuranceBillingCenterPostalCode				
InsuranceBillingCenterContactInfoType				
InsuranceBillingCenterContactInfo				
EmdeonPayerID				
BillingCenterEmdeonPayerID				
IsDeleted				

## GetInsuranceContracts

**Description:** Returns insurance details for contracts in an active status.

Parameter Name	Type	Length	Is Required	Notes
fromDate	date		0	
toDate	date		0	
Data Returns				Notes
InsuranceContractGUID				
InsuranceContractAmount				
SubscriberGUID				



ResponsiblePartyGUID	
InsurancePolicyGUID	
PatientGUID	
TreatmentFeePlanGUID	
NextPaymentAmount	
NextPaymentDate	
TotalNumberOfPayments	
TotalNumberOfFuturePayments	
LastPaymentAmount	
LastPaymentDate	
RemainingBalance	

## GetInsurancePolicies

**Description:** Returns details for patient insurance policies.

Parameter Name	Type	Length	Is Required	Notes
modifiedDate	datetime		0	
Data Returns				Notes
patGUID				
pipGUID				
pipRank				
piplsActive				
oipName				
icbcName				
ResponsiblePersonLastName				
ResponsiblePersonFirstName				
ResponsiblePersonMiddleName				
SubscriberPersonLastName				
SubscriberPersonFirstName				
SubscriberPersonMiddleName				
SubscriberPersonSocial				
SubscriberPersonBirthdate				
pipGroupNumber				
pipPolicyNumber				

## GetInsurancePoliciesForPatient

**Description:** Returns insurance policy details for a patient.

Parameter Name	Type	Length	Is Required	Notes
patGUID	uniqueidentifier		1	
Data Returns				Notes
pipGUID				
pipRank				

piplsActive	
oipName	
icbcName	
BillingCenterEmdeonPayerID	
EmdeonPayorID	
PatientDOB	
ResponsiblePerson	
Subscriber	
SubscriberGender	
SubscriberDOB	
pipGroupNumber	
pipPolicyNumber	

### GetIsFamilyPartyList

**Description:** Returns a list of responsible parties for a patient labeled 'Is Family'.

Parameter Name	Type	Length	Is Required	Notes
ModifiedSince	datetime		0	
patGUID	uniqueidentifier		0	
Data Returns				Notes
PersonGUID				
PersonTitle				
PersonFirstName				
PersonMiddleName				
PersonLastName				
PersonStreetAddress				
PersonCity				
PersonState				
PersonPostalCode				
PersonBirthdate				
PersonGender				
UseEmail				
UsePhone				
UseText				
LastModifiedDate				
Relationship				
IsFamily				
patGUID				
reltypGUID				

### GetLastDismissedAppointments

**Description:** Returns a list of patients and their last dismissed appointment.

Parameter Name	Type	Length	Is Required	Notes
----------------	------	--------	-------------	-------

ExcludeInactive	bit		1	
Data Returns				Notes
PatientGUID				
PatientID				
AppointmentDate				
AppointmentTypeCode				
AppointmentTypeGUID				

## GetLedger

**Description:** Returns transaction details for all ledger entries.

Parameter Name	Type	Length	Is Required	Notes
patGUIDString	char	36	0	
ppGUIDString	char	36	0	
pipGUIDString	char	36	0	
fromDate	datetime		0	
toDate	datetime		0	
showComments	bit		0	
loginGUIDString	char	36	0	
persGUIDRelatedString	char	36	0	
providerGUIDs	nvarchar	max	0	Values separated by ' '
Data Returns				Notes
transGUID				
patGUID				
persGUID				
ppGUID				
pipGUID				
persFullName				
transDateTime				
transStatus				
locCode				
locName				
locCodeAssigned				
locNameAssigned				
orthoCode				
orthoFullName				
empCode				
empFullName				
trcatDescription				
ttypDescription				
transNote				
transReference				
transTooth				

transSurface	
transAmount	
transDueNowAmount	
transDueNowTotal	
transTotalDueAmount	
transTotalDueTotal	
transTransactionID	
transIsGroup	
ttypIsInsurance	
ttypForeColor	
persResponsibleFullName	
practiceName	
transReceiptNote	
inContract	
transDebitGroup	
transCreditGroup	
transUCRAmount	
tfpGUID	
tfpDescription	
IsAdjAppliable	
ttypAdjustmentType	
hasFeeSchedule	
cdtCode	
claimGUID	
ttypGUID	
IsInvalidated	
tmtGUID	
tmtDescription	
tmtFee	
tmtUCRAmount	
tmtAllowableAmount	
tmtPrimary	
tmtSecondary	
locGUIDPosted	
locGUIDAssigned	
empGUIDProviderTreatment	
transRecurringPaymentPosted	
kbGUID	

## GetLocations

**Description:** Returns details for locations in setup for a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
LocationGUID				
LocationName				
LocationCode				
TimeZone				Shows the time zone that each location is set to
LocationPrintedName				Shows name listed in Printed Name field
LocationAddress				
LocationCity				
LocationState				
LocationPostalCode				

## GetLocationsContactInfo

**Description:** Returns contract information for locations in setup for Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
locGUID	nvarchar	255	0	
Data Returns				Notes
LocationGUID				
LocationName				
LocationCode				
ContactInfoValue				
ContractInfoType				

## GetNextVisits

**Description:** Returns next visit details from the treatment card.

Parameter Name	Type	Length	Is Required	Notes
patGUID	uniqueidentifier		0	
fromDate	datetime		0	
Data Returns			Notes	
patGUID				
DateSpecified				
TimeOut				
AppointmentType				
OriginalDate				

Note	
appttypGUID	

## GetNoShowList

**Description:** Returns list of no-show appointments within a date range.

Parameter Name	Type	Length	Is Required	Notes
dtNoShowDateStart	datetime		1	
dtNoShowDateEnd	datetime		1	
Data Returns				Notes
PatientGUID				
PatientTitle				
PatientFirstName				
PatientMiddleName				
PatientLastName				
PatientSuffix				
PatientBirthdate				
PatientGender				
NoShowDate				
NoShowAppointmentType				
PatientContactInfo				
PatientContactInfoType				
PatientStreetAddress				
PatientCity				
PatientState				
PatientPostalCode				

## GetOnlineReservations

**Description:** Returns a list of appointments available for scheduling based on an office's schedule templates.

Parameter Name	Type	Length	Is Required	Notes
startDate	datetime		1	
endDate	datetime		1	
schdvwGUIDs	nvarchar	max	0	
appttypGUIDs	nvarchar	max	0	
morning	bit		0	
afternoon	bit		0	
daysOfWeek	nvarchar	7	0	
Data Returns				Notes
StartTime				

EndTime	
ScheduleColumnDescription	
ScheduleTemplateName	
AppointmentClassDescription	
AppointmentClassGUID	
AppointmentTypeDescription	
AppointmentTypeGUID	
ScheduleViewDescription	
ScheduleColumn	
ScheduleViewGUID	
Minutes	
LocationGUID	
<b>Notes(s):</b>	
- The date range must be within 28 weeks	
- Available appointments must be labeled 'Allow Online Scheduling' in Setup	

## GetPatient

**Description:** Returns GUIDs associated to a patient.

Parameter Name	Type	Length	Is Required	Notes
patGUID	uniqueidentifier		1	
Data Returns				Notes
patGUID				
patID				
persGUID				

## GetPatientAddress

**Description:** Returns address details for all patients.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
Patient GUID				
PatientName				
PatientStreetAddress				
PatientCity				
PatientState				
PatientPostalCode				
paddGUID				

## GetPatientAppointmentDetails

**Description:** Returns a list of all patients with their last/next appointment information.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
patGUID				
patID				
potpGUID				
nextTreatmentPlanStep				
nextpotpsGUID				
LastAppointment				
LastAppointmentLocGUID				
NextAppointment				
NextAppointmentLocGUID				

## GetPatientAppointments

**Description:** Returns all appointments for a specific patient.

Parameter Name	Type	Length	Is Required	Notes
patGUID	uniqueidentifier		1	
ShowCanceled	bit		0	
ShowRescheduled	bit		0	
ShowNoShow	bit		0	
ShowFamily	bit		0	
Data Returns				Notes
apptGUID				
apptDateTime				
schdvwDescription				
apptstDescription				
appttypDescription				
schdcolDescription				
schdvwGUID				
locGUID				
<b>Note(s):</b> - Must add parameters to show Canceled, Rescheduled, NoShow, and/or Family appointment statuses.				



## GetPatientCommentIconList

**Description:** Returns a list of system and custom patient comment icons in setup for a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
showDeleted	bit		0	
Data Returns				Notes
Icon				
icoGUID				
Description				
LocationName				
LocationGUID				
IsDeleted				

## GetPatientEmail

**Description:** Returns email details for all patients.

Parameter Name	Type	Length	Is Required	Notes
locGUIDs	varchar	max	0	Values separated by ' '
ptstatGUIDs	varchar	max	0	Values separated by ' '
Data Returns				Notes
PatientGUID				
PatientName				
PatientEmailType				
PatientEmail				
pciGUID				

## GetPatientForEdit

**Description:** Returns tracking details for an individual patient.

Parameter Name	Type	Length	Is Required	Notes
patGUID	uniqueidentifier		1	
Data Returns				Notes
patGUID				
persGUID				
orgGUID				
patLastModified				
patDeleted				Invalid field as patient's cannot be deleted
ptstatGUID				
empGUIDOrthodontist				
empGUIDAssistant				

locGUID	
patStatusStartDate	
patEntryDate	
patEstimatedCompletionDate	
patProgressDate	
patDebandDate	
patPanorexDate	
patCleaningDate	
patCaseStartDate	
patNewPatientExamDate	
patEstimateMonthsInStatus	
patID	
patOldIDInt	
patModels	
locCode	
empCode	
patRecallDate	
appttypGUIDRecall	
patRecallComment	
schoolGUID	
patRecallType	
empGUIDTreatmentCoordinator	
ptcatGUID	
pttypGUID	
txtypGUID	
obsPatientOBID	
obpGUID	
empGUIDModified	
patArchiveDate	Invalid field as patient's cannot be archived
patIdDenticon	

## GetPatientHistory

**Description:** Returns historical details for patient changes/additions.

Parameter Name	Type	Length	Is Required	Notes
startDate	datetime		1	
endDate	datetime		1	
patGUID	uniqueidentifier		1	
Data Returns				
Data Returns				Notes
phistGUID				
patGUID				
phistDateTime				
phistDescription				
phtGUID				
empGUID				

phistTo	
phistFrom	
phistDocument	
phistField	
phistIsSystem	
phistToDescription	
phistFromDescription	
phistMessage	
vendGUID	
estorGUID	

## GetPatientInformation

**Description:** Returns 'Edit Patient' details for an individual patient.

Parameter Name	Type	Length	Is Required	Notes
patguid	nvarchar	4000	1	
Data Returns				Notes
PatientFullName				
PatientGender				
PatientBirthDate				
PatientSchool				
Location				
Orthodontist				Full name of the patient’s orthodontist/provider
Assistant				Full name of the patient’s assigned assistant
TreatmentCoordinator				Full name of the patient’s assigned treatment coordinator
PatID				
PatientModels				
PatientStreet				Primary address for the patient if more than 1
PatientCity				Primary address for the patient if more than 1
PatientState				Primary address for the patient if more than 1
PatientPostalCode				Primary address for the patient if more than 1
PatientEmail				First patient contact info where the contact info type has the group Email
PatientPhone				First patient contact info with the group Phone or Mobile
PatientPhoneDescription				The description field next to the contact info for the phone

## GetPatientInsurancePolicies

**Description:** Returns details for all patient insurance policies.

Parameter Name	Type	Length	Is Required	Notes
ExcludeInactivePatients	bit		0	Default is 0 (false)
Data Returns				
Data Returns				Notes
pipGUID				
patGUID				
oipGUID				
icbcGUID				
pipPolicyNumber				
pipGroupNumber				
ctypGUID				
pipAcceptAssignment				
pipPredeterminationRequired				
pipInitialRequired				
pipContinuationRequired				
ppGUID				
pipLastModified				
patOldIDInt				
respOldIDInt				
insOldIDInt				
empOldIDInt				
orgGUID				
pipRank				
piplsActive				
pipOldIDInt				
pipSubscriberName				
pipNote				
ppGUIDResponsible				
empGUIDModified				
pipDeleted				
fsGUID				
pipIndividualDeductible				
pipIndividualAnnualMax				
pipFamilyDeductible				
pipFamilyAnnualMax				
pipIndividualOrthoDeductible				
pipIndividualOrthoMax				
pipReplaceMissingTeeth				
pipLifetimeMax				
pipInNetwork				
pipPayOutOfNetwork				
pipBenefitRenewal				
pipExcludeFromMassBenefitUpdate				
pipIndividualOrthoMaxRemaining				

pipIndividualDeductibleRemaining	
pipIndividualAnnualMaxRemaining	
pipTrackingRequired	

## GetPatientList

**Description:** Returns basic patient information for all patients.

Parameter Name	Type	Length	Is Required	Notes
patEntryDate	datetime		0	
ModifiedSince	datetime		0	
LocGUIDs	varchar	max	0	
Data Returns				Notes
PatientGUID				
PatientTitle				
PatientFirstName				
PatientMiddleName				
PatientLastName				
PatientSuffix				
PatientBirthdate				
PatientGender				
PatientSocial				
PatientID				
PatientStreetAddress				
PatientCity				
PatientState				
PatientPostalCode				
PatientOrthodontistGUID				
PatientOrthodontistCode				
PatientOrthodontistName				
PatientLocationGUID				
PatientLocationName				
PatientStatusGUID				
PatientStatusDescription				
UseEmail				
UsePhone				
UseText				
StatusStartDate				
LastAppointmentDate				
MonthsInStatus				
EstimatedMonthsInStatus				
PatientTreatmentCoordinatorGUID				
EntryDate				
Rank				
PatientGreeting				

LastModifiedDate	
EstimatedCompletionDate	
DefaultEntryDate	
PersonGUID	
paddGUID	
LocationName	
<b>Note(s):</b> - EntryDate is the first date that each patient's entry date is changed to. This field will likely be useless in most cases since it is meaningless for most patients which are converted.	

## GetPatientPhone

**Description:** Returns a list of all patient phone numbers listed.

Parameter Name	Type	Length	Is Required	Notes
locGUIDs	varchar	max	0	Values separated by ' '
ptstatGUIDs	varchar	max	0	Values separated by ' '
Data Returns		Notes		
PatientGUID				
PatientName				
PatientPhoneType				
PatientPhone				
PatientPhoneGroup				
PhoneNumberRanking				
pciGUID				

## GetPatientRelationshipContactInfo

**Description:** Returns details for all contact information listed for responsible parties linked to a patient.

Parameter Name	Type	Length	Is Required	Notes
patGUID	uniqueidentifier		1	
familyOnly	bit		1	
ignoreSMSCarrier	bit		1	
Data Returns		Notes		
Patient				
FullName				
persGUID				
Relationship				
Type				
Group				
Contact				
SMSFormat				
sortRank				

## GetPatientResponsiblePartyLinks

**Description:** Returns unique IDs associated to connected relationships for all patients.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				
Data Returns				Notes
PatientResponsiblePartyJoinGUID				
PatientGUID				
ResponsiblePartyGUID				
RelationshipTypeGUID				

## GetPatientsContinuingCare

**Description:** Returns details for patients qualifying for continuing care.

Parameter Name	Type	Length	Is Required	Notes
StartDate	datetime		1	
EndDate	datetime		1	
LocationGUIDs	nvarchar	max	0	Values separated by ','
PatientStatusGUIDs	nvarchar	max	0	Values separated by ','
Data Returns				
Data Returns				Notes
CareDate				
ContinuingCare				
Status				
StatusGUID				
Patient				
patGUID				
Location				
locGUID				
NextAppointmentDate				
NextAppointmentGUID				
ContactInfo				

## GetPatientStatuses

**Description:** Returns of list of patient statuses found in setup for a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
showDeleted	bit		0	
Data Returns				
Data Returns				Notes
PatientStatusGUID				ptstatGUIDs
PatientStatusDescription				
PatientStatusCode				

PatientBackgroundColor	
PatientForegroundColor	
PatientStatusIsInactive	
PatientStatusIsActive	
PatientStatusDeleted	
PatientStatusGCode	

## GetPayments

**Description:** Returns a list of payments and details within a date range.

Parameter Name	Type	Length	Is Required	Notes
StartDateParam	datetime		1	
EndDateParam	datetime		1	
BreakByParam	int		0	
Data Returns				Notes
transGUID				
Date				
Patient				
ResponsibleParty				
InsuranceCompany				
TransactionType				
Amount				
Orthodontist				
Location				
transIsGroup				
BreakByValue				

## GetPortalPatientLookup

**Description:** Returns a list of patients and/or responsible parties ordered by lastName, firstName.

Parameter Name	Type	Length	Is Required	Notes
filter	nvarchar	250	1	lastName, firstName or Patient ID
lookupByPatient	bit		0	1=by Patient(Default), 0=by Responsible Party
showInactive	bit		0	Default=0
orthodontist	nvarchar	50	0	
location	nvarchar	50	0	
pageIndex	int		1	
pageSize	int		1	Max 1000
Data Returns				Notes
PatientGUID				
PatientPersonGUID				
PatientLastName				



PatientFirstName	
PatientGreeting	
PatientMiddleName	
PatientBirthDate	
PatientID	
PatientStatusGUID	
PatientStatusCode	
PatientStatusDescription	
PatientIsInactive	
LocationGUID	
LocationCode	
LocationName	
ResponsibleRelationshipGUID	
ResponsibleGUID	
ResponsibleLastName	
ResponsibleFirstName	
ResponsibleGreeting	
ResponsibleMiddleName	
OrthobancProviderGUID	
OrthobancProviderID	
PatientOrthobancID	
ResponsibleOrthobancID	

## GetPostalCodes

**Description:** Returns a list of all postal codes in setup for a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
showDeleted	bit		0	
Data Returns				
Data Returns				Notes
PostalCodeGUID				
PostalCode				
City				
State				
IsDeleted				

## GetProductionByDateRange

**Description:** Returns a list of all production created in a date range.

Parameter Name	Type	Length	Is Required	Notes
StartDate	datetime		1	
EndDate	datetime		1	
LocationGUIDs	nvarchar	max	0	
ProviderGUIDs	nvarchar	max	0	

BreakBy	int		0	
Data Returns				
Data Returns				Notes
TransactionDateTime				
PatientName				
ResponsiblePartyName				
InsuranceName				
TransactionTotalDueAmount				
TransactionTypeDescription				
TransactionCategory				
Location				
Provider				
transGUID				
IsDiscount				
BreakByValue				

### GetRecallListByDate

**Description:** Returns a list of recalls for a particular date or date range.

Parameter Name	Type	Length	Is Required	Notes
dtRecall	datetime		1	
dtRecallEnd	datetime		0	
Data Returns				
Data Returns				Notes
PatientGUID				
PatientRecallDate				
RecallAppointmentType				
RecallComment				
RecallType				

### GetReceiptsByDateRange

**Description:** Returns a list of receipts (payments) posted.

Parameter Name	Type	Length	Is Required	Notes
StartDate	datetime		1	
EndDate	datetime		1	
LocationGuids	nvarchar	max	0	Values separated by ' '. Default is null (returns data for all locations).
IncludeAdjustments	bit		0	Default is null; passing value of '1' will include adjustments
ProviderGuids	nvarchar	max	0	Values separated by ' '. Default is null (returns data for all providers).
BreakBy	int		0	Default is 0

Data Returns	Notes
transGUID	
transDateTime	
DoctorCode	
EmployeeCode	
PaymentType	
TypeDescription	
PatientName	
PatientID	
ResponsiblePartyName	
InsuranceName	
Reference	
Note	
DueNowAmount	
LocationName	
ProviderName	
transIsGroup	
TransactionCategory	
BreakByValue	

## GetReferralLinkData

**Description:** Returns a list of patient links to referrals.

Parameter Name	Type	Length	Is Required	Notes
ReferralDateBegin	datetime		0	
ReferralDateEnd	datetime		0	
ReferralType	nvarchar	50	0	
Data Returns				Notes
ReferralName				
ReferralFormalName				
Profession				
PointOfContactName				
EmployedBy				
AddressInfo				
ContactInfo				
ContractTotals				
PatientName				
persGUIDRelated				
DateReferralCreated				

## GetReferrals

**Description:** Returns every professional who is a potential referral source in setup on a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
ReferralGUID				
PointOfContactName				
EmployedBy				
isPerson				
ReferralTitle				
ReferralFirstName				
ReferralLastName				
ReferralStreetAddress				
ReferralCity				
ReferralState				
ReferralPostalCode				
Profession				

## GetRelationshipTypeList

**Description:** Returns a list of all relationship types in setup for a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
showDeleted	bit		1	
Data Returns				Notes
RelationshipTypeGUID				
RelationshipTypeDescription				
RelationshipTypeCode				
RelationshipTypeIsFamily				
RelationshipTypeDeleted				
RelationshipTypeGadgeCode				

## GetResponsiblePartiesForPatient

**Description:** Returns a list of all relationships marked as 'financially responsible' linked to a patient.

Parameter Name	Type	Length	Is Required	Notes
PatientGUID	uniqueidentifier		1	
Data Returns				Notes
ResponsibleRelationshipGUID				

ResponsibleGUID	
RelationshipTypeGUID	
RelationshipTypeDescription	
RelationshipTypeCode	
ResponsibleOrthobancID	
OrthobancProviderGUID	
OrthobancProviderID	
ResponsibleFirstName	
ResponsibleLastName	
ResponsibleMiddleName	
ResponsibleGreeting	
ResponsibleSuffix	
ResponsibleSSN	
ResponsiblePartyStreetAddress	
ResponsiblePartyCity	
ResponsiblePartyState	
ResponsiblePartyPostalCode	
ResponsiblePartyDOB	
ResponsiblePartyGender	
<b>Note(s):</b> - If a responsible party marked as financially responsible has multiple addresses listed, there will be duplicate returns.	

### GetResponsiblePartiesPhoneForPatient

**Description:** Returns all phone numbers for a responsible party who are marked financially responsible by a patient.

Parameter Name	Type	Length	Is Required	Notes
PatientGUID	uniqueidentifier		1	
Data Returns				Notes
ResponsiblePartyGUID				
ResponsiblePartyName				
ResponsiblePartySortName				
ResponsiblePartyPhoneType				
ResponsiblePartyPhone				

## GetResponsiblePartyAddress

**Description:** Returns the address listed for a responsible party.

Parameter Name	Type	Length	Is Required	Notes
ppGUID	uniqueidentifier		1	
Data Returns				Notes
ResponsiblePartyAddress				
paddGUID				

## GetResponsiblePartyAgingData

**Description:** Returns aging for responsible parties and insurance companies; broken out by responsible parties.

Parameter Name	Type	Length	Is Required	Notes
AgeOfBalance	int		1	0=Due Now, 10=Over 10, 30=Over 30, 60=Over 60, 90=Over 90,120=Total Due
IncludeInsuranceInBalances	bit		0	Default = 0
MinimumBalance	money		0	Default = 1
FutureDate	datetime		1	
PatientLocations	nvarchar	max	1	Values separated by ' '
ProviderGuids	nvarchar	max	0	Values separated by ' '
UseCurrent	bit		0	Default = 0
FromLastnameFilter	nvarchar	50	0	
ToLastnameFilter	nvarchar	50	0	
Data Returns				Notes
ResponsiblePartyUniqueID				
ResponsiblePartyName				
ResponsiblePartySortName				
CurrentDue				
Over10				
Over30				
Over60				
Over90				
DueNow				
PastDue				
FutureDue				
TotalDue				
ResponsiblePartyStreetAddress				
ResponsiblePartyCityStatePostal Code				
BillingOption				
ResponsiblePartyAccountNumber				
PatientUniqueID				

## GetResponsiblePartyBalance

**Description:** Returns responsible party balances and aging.

Parameter Name	Type	Length	Is Required	Notes
ppGUID	uniqueidentifier		1	
Data Returns				Notes
Current				
Over10				
Over30				
Over60				
Over90				
DueNow				
FutureDue				
TotalDue				

## GetResponsiblePartyEmail

**Description:** Returns email addresses for all responsible parties.

Parameter Name	Type	Length	Is Required	Notes
locGUIDs	varchar	max	0	Values separated by ' '
ptstatGUIDs	varchar	max	0	Values separated by ' '
Data Returns				Notes
ResponsiblePartyGUID				
ResponsiblePartyName				
ResponsiblePartySortName				
ResponsiblePartyEmailType				
ResponsiblePartyEmail				
pciGUID				
<b>Note(s):</b> - If a responsible party has multiple email addresses listed, there will be duplicate returns.				

## GetResponsiblePartyEmailByPatient

**Description:** Returns all email addresses for responsible parties by patient.

Parameter Name	Type	Length	Is Required	Notes
patGUID	nvarchar	50	1	
Data Returns				Notes
ResponsiblePartyGUID				
ResponsiblePartyName				
ResponsiblePartySortName				
ResponsiblePartyEmailType				
ResponsiblePartyEmail				

## GetResponsiblePartyList

**Description:** Returns a list of all responsible parties.

Parameter Name	Type	Length	Is Required	Notes
ModifiedSince	datetime		0	
LocGUIDs	varchar	max	0	Values separated by ' '
Data Returns				Notes
ResponsiblePartyGUID				
ResponsiblePartyTitle				
ResponsiblePartyFirstName				
ResponsiblePartyMiddleName				
ResponsiblePartyLastName				
ResponsiblePartyStreetAddress				
ResponsiblePartyCity				
ResponsiblePartyState				
ResponsiblePartyPostalCode				
ResponsiblePartyBirthdate				
ResponsiblePartyGender				
UseEmail				
UsePhone				
UseText				
LastModifiedDate				
paddGUID				
LocationName				
<b>Note(s):</b>				
- If a responsible party has multiple addresses listed, there will be duplicate returns.				



## GetResponsiblePartyPhone

**Description:** Returns a list of all phone numbers for responsible parties.

Parameter Name	Type	Length	Is Required	Notes
locGUIDs	varchar	max	0	Values separated by ' '
ptstatGUIDs	varchar	max	0	Values separated by ' '
Data Returns				Notes
ResponsiblePartyGUID				
ResponsiblePartyName				
ResponsiblePartySortName				
ResponsiblePartyPhoneType				
ResponsiblePartyPhone				
PhoneNumberRanking				
pciGUID				

## GetScheduleViewColumnList

**Description:** Returns a list of schedule view and column combinations, ordered by the schedule view description, then by the schedule column order for each schedule view.

Parameter Name	Type	Length	Is Required	Notes
showDeleted	bit		0	
schdvwGUID	uniqueidentifier		0	
Data Returns				Notes
ScheduleViewDescription				
ScheduleViewDeleted				
ScheduleViewGUID				
ScheduleColumnDescription				
ScheduleViewColumnOrder				
ScheduleViewColumnDeleted				
ScheduleViewColumnGUID				
<b>Note(s):</b>				
- With showDeleted = 0 and schdvwGUID = null (returns columns for all schedule views)				

## GetScheduleViewList

**Description:** Returns a list of all schedule views.

Parameter Name	Type	Length	Is Required	Notes
showDeleted	bit		1	
Data Returns				Notes
ScheduleViewDescription				
ScheduleViewMinutesPerRow				
Location				
ScheduleViewStartTime				
ScheduleViewEndTime				
ScheduleViewOrder				
ScheduleViewDeleted				
schdvwGUID				
locGUID				

## GetSchoolList

**Description:** Returns a list of schools in setup for a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
SchoolName				

## GetSmsCarriers

**Description:** Returns a list of all SMS Carriers in setup for a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
smsGUID				
smsCarrierName				

## GetSoonerIfPossibleAppointments

**Description:** Returns a list of all appointments in the future that have the 'Sooner if Possible' checkbox selected.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
patGUID				
PatID				
FirstName				
LastName				
BirthDate				
ApptDateTime				
ApptType				
MobilePhone				First phone number listed with a Contact Info Type of 'Mobile'
EmailAddress				First email address listed with a Contact Info Type of 'Email'

## GetStaff

**Description:** Returns a list of all employees in setup on a Cloud 9 database.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
EmployeeGUID				
EmployeeTitle				
EmployeeFirstName				
EmployeeMiddleName				
EmployeeLastName				
EmployeeSuffix				
EmployeeGreeting				
EmployeeType				
EmployeeProviderNumber				
EmployeeLicenseNumber				
EmployeeTIN				

## GetStaffContactInfo

**Description:** Returns a list of all contact information for employees.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
EmployeeGUID				
EmployeeContactInfoType				
EmployeeContactInfo				

## GetTransactionTypeList

**Description:** Returns a list of all transaction types for a Cloud 9 database

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
trcatDescription				
ttypGUID				
ttypCode				
ttypDescription				
ttypForeColor				
ttypLastModified				
ttypDeleted				
trcatGUID				
ttypAmount				
orgGUID				
ttypSystem				
procOldIDInt				
tranOldIDInt				
ttypAffectsDueNow				
ttypAffectsTotalDue				
ttypShowInTreatmentCard				
ttypShowOnDepositReport				
ttypAffectsProduction				
ttypIsCaseStart				
ttypShowOnAdjustmentsReport				
ttypIsDiscount				
ttypIsCreditCard				
ttypAdjustmentType				
ttypIsLateFee				
ttypShowOnSummary				
ttypIsPaidInFullDiscount				
ttypIsCourtesyDiscount				

ttypIsInsurance	
ttypIsNoShowFee	
ttypGaidgeCodes	
codeGUIDFeeSchedule	
ttypIsFAOptional	
ttypExtractOnComplete	
ttypMissingOnComplete	
ttypNumberOfPayments	
ttypCustomOverlay	
ttypIsHouse	
ttypPattern	
ttypTreatAsOrtho	
ttypIsContinuingCare	
ttypContinuingCareTimeSpan	
ttypIsPaymentArrangement	
ttypIsOriginOfStart	
ttypExcludeFromInsurance	
ttypExcludeFromCharting	
ttypContinuingCarePlusDay	
ttypShowOnPatientRouteSheetReport	
ttypIsNSFFee	

## GetVersion

**Description:** Returns Cloud 9 version details.

Parameter Name	Type	Length	Is Required	Notes
none	n/a	n/a	--	
Data Returns				Notes
versGUID				
versversion				
versSchemaVersion				
versIsUpdating				

## SET

### SetAppointment

**Description:** Allows for the creation of an appointment for existing patients.

Parameter Name	Type	Length	Is Required	Notes
PatientGUID	uniqueidentifier		1	
StartTime	datetime		1	
ScheduleViewGUID	uniqueidentifier		1	
ScheduleColumnGUID	uniqueidentifier		1	
AppointmentTypeGUID	uniqueidentifier		1	
Minutes	int		1	
VendorUserName	nvarchar	25	1	
PatientOrthodontistGUID	uniqueidentifier		0	
Note	nvarchar	500	0	
Data Returns				Notes
Result (On Success)				Appointment GUID Added: <i>apptGUID</i>
<b>Customized Error List:</b> <ul style="list-style-type: none"> <li>- Error: Minutes must be greater than 0.</li> <li>- Error: Patient GUID specified does not exist.</li> <li>- Error: Appointment Type GUID specified does not exist or does not allow online scheduling.</li> <li>- Error: Schedule View GUID specified does not exist.</li> <li>- Error: Schedule Column GUID specified does not exist.</li> <li>- Error: Patient Orthodontist GUID specified does not exist or the employee is not an orthodontist.</li> <li>- Error: Appointments cannot be scheduled in the past.</li> <li>- Error: This appointment cannot be scheduled in the specified time slot.</li> </ul>				

### SetAppointmentInsuranceVerified

**Description:** Checks Insurance Verified checkbox on appointment bubble on Schedule.

Parameter Name	Type	Length	Is Required	Notes
apptGUIDs	nvarchar	max	1	Values separated by ' '
Data Returns				Notes
Success				Success: # of # Appointments were updated.
<b>Customized Error List:</b> <ul style="list-style-type: none"> <li>- Error: No appointments with status Scheduled were found.</li> <li>- Error: No apptGUIDs were provided</li> </ul>				

## SetAppointmentStatusCanceled

**Description:** Pushes appointment cancellations for a selected scheduled appointment.

Parameter Name	Type	Length	Is Required	Notes
apptGUID	uniqueidentifier		1	
VendorUserName	nvarchar	25	0	
Data Returns				Notes
Result				Success
<b>Customized Error List:</b> - Error: Invalid value for parameter: 'apptGUID'				

## SetAppointmentStatusConfirmed

**Description:** Pushes appointment confirmation for a selected scheduled appointment.

Parameter Name	Type	Length	Is Required	Notes
apptGUID	uniqueidentifier		1	
Data Returns				Notes
Result				Success
<b>Customized Error List:</b> - Error: Invalid value for parameter: 'apptGUID'				

## SetPatient

**Description:** Allows for the creation of a new patient.

Parameter Name	Type	Length	Is Required	Notes
patientFirstName	nvarchar	50	1	
patientLastName	nvarchar	50	1	
providerGUID	uniqueidentifier		1	
locationGUID	uniqueidentifier		1	
note	nvarchar	max	0	
birthdayDateTime	datetime		0	
addressStreet	nvarchar	100	0	
addressCity	nvarchar	50	0	
addressState	nvarchar	50	0	State abbreviation only
addressPostalCode	nvarchar	50	0	
postalCodeGUID	uniqueidentifier		0	
phoneNumber	nvarchar	50	0	
gender	nvarchar	1	0	Male/Female supported
VendorUserName	nvarchar	25	1	
persGUIDRelated	uniqueidentifier		0	

reltypGUID	uniqueidentifier		0	Required if sending persGUIDRelated
smsGUID	uniqueidentifier		0	
ciDescription	nvarchar	50	0	
empGUIDTreatmentCoordinator	uniqueidentifier		0	
persGUID	uniqueidentifier		0	
Data Returns				
Data Returns				Notes
Result				Patient Added: <i>Patient GUID</i>
<b>Note(s):</b> <ul style="list-style-type: none"> <li>- The UI supports multiple provider assignments, but the API will only allow one provider assignment push per patient.</li> <li>- If you do not need to send a separate person (ie: Parent) for the patient's FRP, do not send additional parameters and FRP will default to SELF for patient.</li> <li>- It removes all the invalid characters from the phoneNumber parameter.</li> <li>- If adding SMS Carrier to phoneNumber, run GetSMSCarriers to capture the smsGUID (Carrier)</li> <li>- Added a check to make sure that the customer database has the Patient status with the code "NEW". The vendor will now receive an error if this is not the case and customer will need to have this resolved before they can push patients.</li> <li>- If database doesn't have a "NEW" patient status code (without the quotes), the patient is not added and the following is returned: 'Error: Patient status with code "NEW" does not exist.'</li> <li>- Customer also must have a contact info type with the description "Home" (without the quotes) if the vendor is trying to push in a phone number when creating the patient, if not the following is returned: 'Error: A phone number cannot be provided if a Contact Info Type of Home does not exist.'</li> <li>- If something other than a 2-character state abbreviation is passed for addressState an error will return: &lt;Result&gt;Error: Error: The Provided state code is invalid. &lt;/Result&gt;</li> <li>- If the empGUID being passed is not marked as a Tx Coordinator in their C9 setup, they are not saved to prevent an invalid employee from being set as the patient's tx coordinator</li> </ul>				
<b>Customized Error List:</b> <ul style="list-style-type: none"> <li>- Error: Patient GUID specified does not exist.</li> <li>- Error: Patient Comment GUID specified does not exist.</li> <li>- Error: Patient Comment GUID is locked from editing.</li> <li>- Error: Provider GUID specified does not exist.</li> <li>- Error: Location GUID specified does not exist.</li> <li>- Error: If an address is being supplied, the street address cannot be blank.</li> <li>- Error: Either a postalCodeGUID or a City/State/ZipCode combination is required.</li> <li>- Error: Postal Code GUID specified does not exist.</li> <li>- Error: The Provided state code is invalid</li> <li>- Error: A phone number cannot be provided if a Contact Info Type of Home does not exist.</li> <li>- Error: Patient status with code "NEW" does not exist.</li> <li>- Error: Provided empGUIDTreatmentCoordinator not matching any active Treatment Coordinator</li> <li>- ErrorCode 3 = Invalid value for parameter (<i>gives which parameter - normally invalid GUID</i>)</li> <li>- ErrorCode 16 = Procedure validation failure. Error: (<i>gives what the error was specifically - ie: GUID does not exist, was deleted, etc</i>)</li> </ul>				
<b>Procedure Validation Errors:</b> <ul style="list-style-type: none"> <li>- Patient first name cannot be blank.</li> <li>- Patient last name cannot be blank.</li> <li>- Patient status with code "NEW" does not exist.</li> <li>- Provider GUID specified does not exist.</li> <li>- Provider must have a specialty.</li> </ul>				



- Location GUID specified does not exist.
- A phone number cannot be provided if a Contact Info Type of Home does not exist.
- If an address is being supplied, the street address cannot be blank.
- Either a postalCodeGUID or a City/State/ZipCode combination is required.
- Postal Code GUID specified does not exist.
- If Relationship Type GUID is being provided, the Related Person GUID is required
- If Related Person GUID is being provided, the Relationship Type GUID is required.
- Related Person GUID specified does not exist.
- Related Person GUID specified is deleted.
- Relationship Type GUID specified does not exist.

## SetPatientComment

**Description:** Pushes patient comments against a patient profile in Cloud 9. This procedure can be used to add or edit a patient comment, depending on if the pcGUID is provided. Comments added by the vendor will get the 'Vendor Comment' patient comment type. Cloud 9 continues to store the comment text that the vendor passed in.

Parameter Name	Type	Length	Is Required	Notes
patGUID	uniqueidentifier		1	
pcGUID	uniqueidentifier		0	Updates an existing patient comment
patComment	nvarchar	2048	1	Required if adding a new comment
pcShowInLedger	bit		0	
pcShowInTreatmentCard	bit		0	
pcShowInDentalChart	bit		0	
pcShowInSchedule	bit		0	
pcPrompt	bit		0	
pcShowInCheckin	bit		0	
pcShowInCheckinOnce	bit		0	
pcShowInCheckout	bit		0	
pcNextAptTrigger	bit		0	
VendorUserName	nvarchar	25	0	Defaults to Vendor Username
pipGUID	uniqueidentifier		0	
ppGUID	uniqueidentifier		0	
pctGUID	uniqueidentifier		0	
pclcon	nvarchar	50	0	
pclconIndex	int		0	System Icons will utilize a file path. Ex: /Images/adjustment.png Custom Client Icons will utilize the GUID from the <Icon> return on GetPatientCommentIconList Ex: <Icon>cc83f1e5-4f29-e036-2037-9855c0c11d99</Icon>
Data Returns				Notes
Result				Patient Comment GUID Added:


**Note(s):**

- To send a hyperlink (opens in a separate tab), <patComment>hyperlink(url="url",text="text displayed")</patComment>
- Example: <patComment>Come visit us at hyperlink(url="https://cloud9.software",text="Cloud 9 Software")</patComment>
- If editing an existing comment the return appears as '*Patient Comment GUID Updated: <pcGUID>*'

**Customized Error List:**

- Error: Patient GUID specified does not exist.
- Error: Patient Comment GUID specified does not exist.
- Error: Patient Comment GUID is locked from editing.

List of System Icons		
Icon Name	Path	Icon
Accedent	/Images/icon-a.png	
Adjustment	/Images/adjustment.png	
Autism	/Images/icon-autism.png	
Financial	/Images/alert-dollar.png	
Folder	/Images/icon-folder.png	
Invisalign	/Images/icon-invisalign.png	
Medical Alert	/Images/medalert-generic.png	
Medical Alert – Heart	/Images/medalert-heartproblem.png	
Medical Alert – Latex Allergy	/Images/medalert-latexglove.png	
Medical Alert - Premedication	/Images/medalert-premed.png	
No-Photo	/Images/icon-nophoto.png	

Out of Town	/Images/icon-outoftown.png	
Patient	/Images/icon-patient.png	
Pencil	/Images/icon-pencil.png	
Phone	/Images/icon-phone.png	
Smile	/Images/alert-smile.png	
Spanish	/Images/alert-spanish.png	
Spanish	/Images/alert-espanol.png	
Star	/Images/alert-star.png	
Surgery	/Images/icon-surgery.png	

## SetPatientDemographicInfo

**Description:** Allows for updating patient demographics and contact information for existing patients.

Parameter Name	Type	Length	Is Required	Notes
patGUID	nvarchar	50	1	
patID	nvarchar	20	0	
persFirstName	nvarchar	50	0	
persLastName	nvarchar	50	0	
persGender	nvarchar	10	0	Male/Female supported
persBirthdate	nvarchar	20	0	
ciValue	nvarchar	50	0	
citDescription	nvarchar	15	0	Required if sending ciValue
addStreet	nvarchar	100	0	
pcodCity	nvarchar	50	0	

pcodState	nvarchar	2	0	Two character state abbreviations allowed
pcodCode	nvarchar	10	0	
pciGUID	nvarchar	50	0	
racGUID	nvarchar	50	0	
VendorUserName	nvarchar	25	0	Defaults based on username submitted
smsGUID	nvarchar	50	0	Provided with GetSmsCarriers
ciDescription	nvarchar	50	0	
ptstatGUID	nvarchar	50	0	
persUsePhone	bit		0	Sets Correspondence box for phone contact method
persUseEmail	bit		0	Sets Correspondence box for email contact method
persUseText	bit		0	Sets Correspondence box for text contact methods
empGUIDTreatmentCoordinator	uniqueidentifier		0	Updates Tx Coordinator field
<b>Data Returns</b>				<b>Notes</b>
Result				Patient demographic updated
<b>Note(s):</b> - If you wish to create a new PersonContactInfo record, send an empty GUID in the pciGUID element--> <!--<pciGUID>00000000-0000-0000-0000-000000000000</pciGUID>--> - Updating a row of Contact Info for a patient does not edit the existing row but creates and replaces. If trying to match the existing details for a row of contact info, run GetPatientPhone for Contact Info Type, Description, Contact Info, and SMS Carrier (GetSmsCarrier for smsGUID) - Setting Patient Status <ptstatGUID> updates the following items/fields: - Removes existing to-do's related to the previous Patient Status - Patient Status Start Date - Estimated Months in Status Date - Progress Date - Deband Date may update based on Patient Status setup in Cloud9 - Update noted in Patient History - Does not generate new to-do's if that trigger is setup in Cloud9				

## SetPerson

**Description:** Allows for the creation of a person, demographics, and contact information.

Parameter Name	Type	Length	Is Required	Notes
persFirstName	nvarchar	50	1	
persMiddleName	nvarchar	50	0	
persLastName	nvarchar	50	1	
persSocial	nvarchar	10	0	
persGender	nvarchar	10	0	Male/Female supported
persSuffix	nvarchar	10	0	
persGreeting	nvarchar	30	0	

persBirthdate	datetime		0	
citDescription	nvarchar	15	0	Required if ciValue is provided
addStreet	nvarchar	100	0	Required if any address field is provided
pcodCity	nvarchar	50	0	Required if any address field is provided
pcodState	nvarchar	2	0	Required if any address field is provided
pcodCode	nvarchar	10	0	Required if any address field is provided
racGUID	uniqueidentifier		0	
VendorUserName	nvarchar	25	0	
ciValue	nvarchar	50	0	
smsGUID	uniqueidentifier		0	
ciDescription	varchar	50	0	
Data Returns			Notes	
Result			Person Added: persGUID / ResponsibleGUID / ResponsiblePartyGUID	
<b>Note(s):</b> - Before adding a person, please check that this is NOT already present in Cloud 9.				
<b>Customized Error List:</b> - Error: Required parameter persFirstName was not provided. - Error: Required parameter persLastName was not provided. - Error: Required parameter citDescription was not provided. - Error: If an address is being supplied, the street address cannot be blank. - Error: If an address is being supplied, City/State/ZipCode combination is required. - ErrorCode 16 = Procedure validation failure. Error:... (this will disclose which required parameter is missing) - ErrorCode3 = Invalid value for parameter: "(insert parameter details here)"				

## SetPersonDemographicInfo

**Description:** Allows for the updating of demographics and contact information for an existing person in Cloud 9.

Parameter Name	Type	Length	Is Required	Notes
persGUID	nvarchar	50	1	
persFirstName	nvarchar	50	0	
persMiddleName	nvarchar	50	0	
persLastName	nvarchar	50	0	
persSocial	nvarchar	10	0	
persGender	nvarchar	10	0	Male/Female supported
persSuffix	nvarchar	10	0	
persGreeting	nvarchar	30	0	
persBirthdate	nvarchar	20	0	
citDescription	nvarchar	15	0	Required if ciValue is provided
addStreet	nvarchar	100	0	Required if any address field is provided
pcodCity	nvarchar	50	0	Required if any address field is provided
pcodState	nvarchar	2	0	Required if any address field is provided
pcodCode	nvarchar	10	0	Required if any address field is provided
pciGUID	nvarchar	50	0	

racGUID	nvarchar	50	0	
ciValue	nvarchar	50	0	
smsGUID	uniqueidentifier		0	
ciDescription	nvarchar	50	0	
persUsePhone	bit		0	
persUseEmail	bit		0	
persUseText	bit		0	
Data Returns			Notes	
Result			Patient Demographic Updated	
<b>Note(s):</b>				
<ul style="list-style-type: none"><li>- persGUID is the only required parameter for pass through and NOT a reset type of parameter</li><li>- If contact is sent in the parameters then the ciTypeGUID should be required - no ability to pass in a "null", OR default to a chosen citype</li><li>- Updating a row of Contact Info for a patient does not edit the existing row but creates and replaces. If trying to match the existing details for a row of contact info, run GetPatientPhone for Contact Info Type, Description, Contact Info, and SMS Carrier (GetSmsCarrier for smsGUID)</li></ul>				
<b>Customized Error List:</b>				
<ul style="list-style-type: none"><li>- Error: Required parameter persGUID was not provided.</li><li>- Error: persGUID 3AD133F8-0233-58BC-7A8A-1C15FAD2D45D does not exist.</li><li>- Error: Required parameter citDescription was not provided.</li><li>- Error: citDescription WrongCIT does not exist.</li></ul>				

## SetPersonRelationship

**Description:** Allows the user to add or update a relationship for a patient.

Parameter Name	Type	Length	Is Required	Notes
patGUID	uniqueidentifier		1	
persGUID	uniqueidentifier		1	
pplsFamily	bit		0	Default = 0
reltypGUID	uniqueidentifier		1	
ppGUID	uniqueidentifier		0	Person Relationship GUID used to update an existing record
pplsFRP	bit		0	Default = 1
Data Returns				Notes
Result on add				Person Relationship Added: <i>persGUIDRelated</i>
Result on update				Person Relationship Updated: {ppGUID}
<b>Note(s):</b> <ul style="list-style-type: none"><li>- A patient must have at least one responsible party.</li><li>- Is Financially Responsible flag cannot be turned off via API</li></ul>				
<b>Customized Error List:</b> <ul style="list-style-type: none"><li>- Error: Patient {<i>patGUID</i>} already has a relationship with Person {<i>persGUID</i>}.</li><li>- Error: Person Relationship GUID {<i>ppGUID</i>} does not exist.</li></ul>				