

SmartRequest Public API Quickstart Guide

This document will describe how you can use the SmartRequest API to create requests.

If you are using the sandbox environment, API calls will not actually create requests.

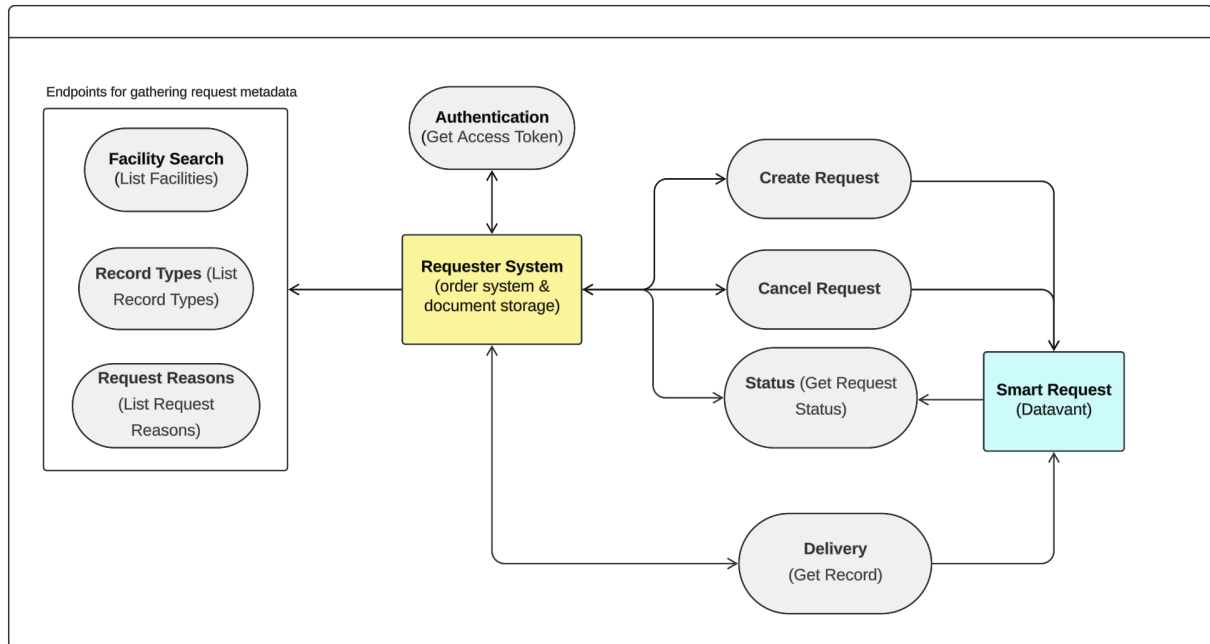
You will receive separate credentials for the sandbox environment.

OpenAPI documentation is also available. You can download the OpenAPI spec from the links below and use them to [set up Postman](#).

- <https://requester-api.datavant.com/redoc>
- <https://sandbox-api.datavant.com/redoc>

High-Level Overview

1. Get auth token
2. Gather prerequisite details for building request
 - Search facility
 - Get request reason
 - Get records types
3. Create request
4. Get status
5. Get download url
6. Cancel request



The steps below will guide you through how to use all of our APIs, including sample payloads.

Get an auth token

POST /auth/token

You must be authenticated in order to call any API endpoints. To get authenticated you'll need to call the /auth/token endpoint.

For pilot customers: you will receive a client ID and secret that will work only in one environment as a password-protected bitwarden link. Your sandbox and production credentials will be different.

Sample input:

```
ENCODED_CREDENTIALS=`echo -n "client_id:client_secret" | base64`
```

```
# Regular call
```

```
curl -X POST https://requester-api.datavant.com/v1/auth/token \
-H "Authorization: Basic $ENCODED_CREDENTIALS"

# Sandbox call
curl -X POST https://sandbox-api.datavant.com/v1/auth/token \
-H "Authorization: Basic $ENCODED_CREDENTIALS"
```

Sample output:

```
{
  "accessToken": "abcdef123456",
  "tokenType": "Bearer",
  "expiresIn": 3600
}
```

You can use the token from the response in subsequent API calls, ex:

```
# Regular call
curl https://requester-api.datavant.com/v1/record-types \
-H "Authorization: Bearer $TOKEN"

# Sandbox call
curl https://sandbox-api.datavant.com/v1/record-types \
-H "Authorization: Bearer $TOKEN"
```

We recommend you either set a timer based on the API output (in this case, 3600 seconds, or 1 hour) or wait for an access denied exception to refresh credentials.

Setting up information for your request creation

GET /facilities

You can use this API to discover which facilities fulfill records through SmartRequest.

The most basic query you can use has no filters. You can paginate through results using this API to get a list of all supported facilities.

```
# Regular call
curl https://requester-api.datavant.com/v1/facilities \
```

```
-H "Authorization: Bearer $TOKEN"
```

```
# Sandbox call
```

```
curl https://sandbox-api.datavant.com/v1/facilities \  
-H "Authorization: Bearer $TOKEN"
```

If you are looking for a specific facility, you can add filters onto that query.

```
export PARAMS="?state=TX"
```

```
# Regular call
```

```
curl \  
"https://requester-api.datavant.com/v1/facilities$PARAMS" \  
-H "Authorization: Bearer $TOKEN"
```

```
# Sandbox call
```

```
curl \  
"https://sandbox-api.datavant.com/v1/facilities$PARAMS" \  
-H "Authorization: Bearer $TOKEN"
```

Query filters support substrings:

```
export PARAMS="?city=Corpus"
```

```
# Regular call
```

```
curl \  
"https://requester-api.datavant.com/v1/facilities$PARAMS" \  
-H "Authorization: Bearer $TOKEN"
```

```
# Sandbox call
```

```
curl \  
"https://sandbox-api.datavant.com/v1/facilities$PARAMS" \  
-H "Authorization: Bearer $TOKEN"
```

You can use multiple query filters at once:

```
export PARAMS="?siteName=Children%27s%20Cancer%20Center"  
export PARAMS="$PARAMS&healthSystem=Universal%20Health%20Services"  
export PARAMS="$PARAMS&addressLine1=5%20Cherry%20Lane"  
export PARAMS="$PARAMS&addressLine2=Ste%20105"  
export PARAMS="$PARAMS&city=Nashville"  
export PARAMS="$PARAMS&state=TN"  
export PARAMS="$PARAMS&phone=7604907559"  
export PARAMS="$PARAMS&fax=3096026651"
```

```
export PARAMS="$PARAMS&zip=37013"

# Regular call
curl \
  "https://requester-api.datavant.com/v1/facilities$PARAMS" \
  -H "Authorization: Bearer $TOKEN"

# Sandbox call
curl \
  "https://sandbox-api.datavant.com/v1/facilities$PARAMS" \
  -H "Authorization: Bearer $TOKEN"
```

Response

```
{
  "totalRows":100,
  "facilities":[
    {
      "siteName":"Children's Cancer Center",
      "healthSystem":"Universal Health Services",
      "Address":"5 Cherry Lane Ste 105",
      "addressLine1":"5 Cherry Lane",
      "addressLine2":"Ste 105",
      "city":"Nashville",
      "state":"TN",
      "zip":"37013",
      "stdZip":"37103",
      "phone":"7604907559",
      "fax":"3096026651"
    }, ...
  ],
  nextToken:"abcdef123456"
}
```

GET /request-reasons

When creating a request, you need to choose the purpose of use. Request reasons do not change over time. If you create several requests with the same reason, you can store and reuse the data from this endpoint.

Request reasons are based on business type (e.g. attorney, copy service, life insurance, etc.). This API requires a customer ID as a query parameter. If you have multiple

customer IDs of the same business type, you may enter any of them and will get the same results. If you have different types of customer accounts (for example, if you are a record retrieval service), note that request reasons will vary between different accounts.

Sample request

```
# Regular call
curl "https://requester-api.datavant.com/v1/request-reasons?companyId=1234567" \
  -H "Authorization: Bearer $TOKEN"

# Sandbox call
curl "https://requester-api.datavant.com/v1/request-reasons?companyId=1234567" \
  -H "Authorization: Bearer $TOKEN"
```

Sample response

```
{
  "reasons": [
    {
      "name": "Attorney - State Attorney Office",
      "businessType": "ATTY",
      "apiCode": "STATE_ATTYY_OFFICE",
      "facilityStates": ["ALL"]
    }, ...
  ]
}
```

Some reasons are only applicable in certain states. If facilityStates contains a list of states rather than “ALL,” you may only use those reasons when requesting from facilities located in one of those states.

GET /record-types

You must specify one or more record types when creating your request. You can find a list of all supported record types using this API. Note that some facilities may not support certain record types. The POST /request API will throw an exception if you request a record type that is not supported by the inputted facility.

To get the highest quality data back, avoid requesting the entire record in favor of requesting a list of more specific records.

Sample request

```
# Regular call
curl https://requester-api.datavant.com/v1/record-types \
  -H "Authorization: Bearer $TOKEN"

# Sandbox call
curl https://requester-api.datavant.com/v1/record-types \
  -H "Authorization: Bearer $TOKEN"
```

Sample response

```
{
  "recordTypes":[
    {
      "name":"Abstract",
      "digitalFulfillment":true
    }, ...
  ]
}
```

Creating a request

POST /request

Note: In the sandbox environment no requests will actually be created. You will instead receive a dummy response.

You'll need information from the APIs mentioned above to construct your request. You can fetch the facility information from /facilities, the reason from /request-reasons, and record types from /record-types. Reasons and record types do not change over time. If you already know your reason, and record type, you do not need to call the APIs again. Facility information may change infrequently (e.g. A facility may change their phone number), so you may want to validate facility information using the /facilities endpoint.

You'll need to base64 encode authorization forms for the request body. The maximum payload size for the request is 10 MB.

A note about callbackDetails

The request body for the POST /request endpoint accepts an optional callbackDetails field. This field specifies parameters for the endpoint to which status updates should be sent. When the status of a request changes, it will be sent to the URL specified in the callbackDetails when the request was created. Here is a sample payload that will be sent to the callback URL:

Sample payload

```
Unset
{
  "requestId": "12345",
  "status": "Delivered",
  "modifiedDate": "YYYY-MM-DDTHH:MM:SS+HH:MM"
}
```

The possible values for the status field are the same as those returned by the GET /request/{request-id}/status endpoint, and like that endpoint, only changes to the status of requests created through the API will be sent to the callback URL.

Here is some additional information and constraints on the the callbackDetails field:

- callbackDetails.method must be either POST, PUT, or PATCH
- callbackDetails.url must begin with https://
- callbackDetails.headers is optional. These header values are primarily used for authentication information. A Content-Type header with the value "application/json" will also be included, overriding anything specified in this field. These headers will NOT be stored in plaintext.

Sample Request


```
export PATIENT_AUTH_ENCODED=`base64 -i patient-auth.pdf`
export REPRESENTATION_LETTER_ENCODED=`base64 -i representation.pdf`
```

Regular call

```
curl -H "Authorization: Bearer $TOKEN" \
-H "Content-Type: application/json" \
-X POST https://requester-api.datavant.com/v1/request \
-d '{
  "facility": {
    "addressLine1": "123 Main St",
    "city": "Townsville",
    "state": "ME",
    "zip": "12345",
    "healthSystem": "City Health System",
    "siteName": "City Hospital",
    "phone": "1234567890",
    "fax": "0987654321"
  },
  "requesterInfo": {
    "companyId": 1234567,
    "companyName": "Smith and Smith",
    "name": "Bob Loblaw",
    "email": "bob@bobloblawslawblog.com"
  },
  "patient": {
    "firstName": "Bob",
    "lastName": "Smith",
    "dateOfBirth": "1950-08-19",
    "ssn": "111223333",
    "customId": "custom id to track patient e.g. case number"
  },
  "reason": {
    "businessType": "ATTY",
    "apiCode": "STATE_ATTY_OFFICE"
  },
  "requestCriteria": [
    {
      "recordTypes": [
        "Abstract",
        "Toxicology reports"
      ],
      "startDate": "2024-01-01",
      "endDate": "2024-01-05"
    }
  ],
  "certificationRequired": false,
  "authorizationForms": [
```

```

        ""$PATIENT_AUTH_ENCODED"",
        ""$REPRESENTATION_LETTER_ENCODED""
    ],
    "callbackDetails": {
        "method": "POST",
        "url": "https://your-callback-url.com",
        "headers": {
            "Authorization": "Bearer 12345",
            "Content-Type": "application/json"
        }
    }
}'

```

Sandbox call

```

curl -H "Authorization: Bearer $TOKEN" \
-H "Content-Type: application/json" \
-X POST https://sandbox-api.datavant.com/v1/request \
-d '{
    "facility": {
        "addressLine1": "123 Main St",
        "city": "Townsville",
        "state": "ME",
        "zip": "12345",
        "healthSystem": "City Health System",
        "siteName": "City Hospital",
        "phone": "1234567890",
        "fax": "0987654321"
    },
    "requesterInfo": {
        "companyId": 1234567,
        "companyName": "Smith and Smith",
        "name": "Bob Loblaw",
        "email": "bob@bobloblawslawblog.com"
    },
    "patient": {
        "firstName": "Bob",
        "lastName": "Smith",
        "dateOfBirth": "1950-08-19",
        "ssn": "111223333"
        "customId": "custom id to track patient e.g. case number"
    },
    "reason": {
        "businessType": "ATTY",
        "apiCode": "STATE_ATTY_OFFICE"
    },
    "requestCriteria": [
        {

```

```

        "recordTypes": [
            "Abstract",
            "Toxicology reports"
        ],
        "startDate": "2024-01-01",
        "endDate": "2024-01-05"
    }
],
"certificationRequired": false,
"authorizationForms": [
    ""$PATIENT_AUTH_ENCODED"",
    ""$REPRESENTATION_LETTER_ENCODED""
],
"callbackDetails": {
    "method": "POST",
    "url": "https://your-callback-url.com",
    "headers": {
        "Authorization": "B == ==earer 12345",
        "Content-Type": "application/json"
    }
}
}'

```

The POST /request endpoint will return the input parameters (with the exception of authorizationForms), and the requestId of the newly created request.

```

{
  "facility": {
    "address": "123 Main St",
    "addressLine1": "123 Main St",
    "addressLine2": null,
    "city": "Townsville",
    "state": "ME",
    "zip": "12345",
    "healthSystem": "City Health System",
    "siteName": "City Hospital",
    "phone": "1234567890",
    "fax": "0987654321"
  },
  "requesterInfo": {
    "companyId": 1234567,
    "companyName": "Smith and Smith",
    "name": "Bob Loblaw",
    "email": "bob@bobloblawslawblog.com"
  }
}

```

```
{
  "patient": {
    "firstName": "Bob",
    "lastName": "Smith",
    "dateOfBirth": "1950-08-19",
    "ssn": "111223333"
  },
  "reason": {
    "businessType": "ATTY",
    "apiCode": "STATE_ATTY_OFFICE"
  },
  "requestCriteria": [
    {
      "recordTypes": [
        "Abstract",
        "Toxicology reports"
      ],
      "startDate": "2024-01-01",
      "endDate": "2024-01-05"
    }
  ],
  "certificationRequired": false,
  "requestId": "12345"
}
```

Outside of the sandbox environment, it is recommended you save and/or log the requestID returned by this call to more easily track your request in our system. Should you need assistance, our support team will need this request ID to provide the best experience troubleshooting.

Checking request status

GET /request/{request-id}/status

You can fetch the request status using the following API call. **Only requests created through the API are available through this status endpoint.** Requests submitted via SmartRequest, fax, or mail are not supported at this time.

```
# Regular call
curl https://requester-api.datavant.com/v1/request/12345/status \
  -H "Authorization: Bearer $TOKEN"

# Sandbox call
curl https://sandbox-api.datavant.com/v1/request/12345/status \
  -H "Authorization: Bearer $TOKEN"
```

Sample response:

```
{
  "requestId": "198216776",
  "status": "Canceled by Fulfillment",
  "modifiedDate": "2024-05-31T18:15:19+00:00"
}
```

Statuses include the following:

- **Created:** Request has been created successfully and is in our fulfillment queue.
- **In Process - Logging:** This status only occurs if your request is submitted via fax. As of right now, the status API is only available for requests created through the SmartRequest API.
- **In Process - Pending Fulfillment:** In this stage, the request is in the queue to be fulfilled at the respective facility.
- **In Process - Fulfillment:** Once a member of our fulfillment team has begun working on the request, the status will show In Process - In Fulfillment. This is the stage where the team is carefully reading through the request letter and searching for the requested record in the electronic health record system or through the archives in the facility.
- **In Process - Quality Assurance:** Once the record has been found, it will go through a diligent quality assurance process where our team makes sure that the records match the request letter and the HIPAA authorization letter perfectly. If

any issues are discovered in this process then the request will be diverted back to the fulfillment process or the request may be canceled with correspondence sent out stating why the request cannot be fulfilled.

- **In Process - Pending Approval:** If there are any specific requirements needing your approval before the processing or release of the record stated in the request letter then the status will reflect as In Process - Pending Approval. Alternatively, in some states, hospitals will require physician approval/notice prior to releasing certain records.
- **In Process - Preparing Invoice:** Once the requested record has been found and it has passed Quality Assurance then it will be processed for invoicing if it is a billable request.
- **In Process - Certification:** If you opted in for certification of the record, then once it has gone through Quality Assurance, it will be certified and the status will show In Process - Certification.
- **Canceled:** Someone on your team canceled the request.
- **Canceled by Fulfillment:** If during the fulfillment stage, the request may be canceled by our fulfillment team who will send out correspondence explaining why the request cannot be fulfilled.
- **Correspondence Sent:** There was an issue with the request. A fulfillment agent uploaded a correspondence letter to this request, which can also be retrieved through the API.
- **Requires Payment:** Record is available but must be paid for before downloading. (This only applies to billable requests)
- **Preparing Record for Delivery:** Transition state after a request has been paid, but before it is ready for download.
- **Record Available:** Record can be downloaded.

Downloading Request Documents

GET /request/{request-id}/download-url/{document-type}

You can fetch request documents using the following API call. **Only documents from requests created through the API are available through this endpoint.** Requests submitted via SmartRequest, fax, or mail are not supported at this time.

We allow the following options for “document-type”:

- REQUEST_LETTER: The request letter/authorization forms uploaded with the original request
- INVOICE: The payment/billing information generated for the request
- MEDICAL_RECORD: The medical records retrieved for the request
- CORRESPONDENCE: If medical records are not found, the correspondence letter generated for the request
- ALL : All of the documents associated with the request are bundled into one PDF

```
# Regular call
```

```
curl
```

```
https://requester-api.datavant.com/v1/request/12345/download-url/MEDICAL_RECORD \
-H "Authorization: Bearer $TOKEN"
```

```
# Sandbox call
```

```
curl https://sandbox-api.datavant.com/v1/request/12345/download-url/MEDICAL_RECORD \
-H "Authorization: Bearer $TOKEN"
```

Sample response:

```
{
  "url": "https://fake-download-url.com"
}
```

Canceling Requests

PUT /request/{request-id}/cancel

You can cancel a request by providing a Request ID and a reason for cancellation.

Requests can only be canceled in these states

- Created
- In Progress - Pending Fulfillment
- In Progress - Fulfillment

Please note that the status returned by our API may take up to an hour to sync. If your cancellation is denied, the request may have already moved into quality assurance. A request can only be canceled once and cancellations are not reversible.

Regular call

```
curl -H "Authorization: Bearer $TOKEN" \
  -H "Content-Type: application/json" \
  -X PUT https://requester-api.datavant.com/v1/request/12345/cancel \
  -d '{
    "reason": "cancellation reason"
  }'
```

Sandbox call

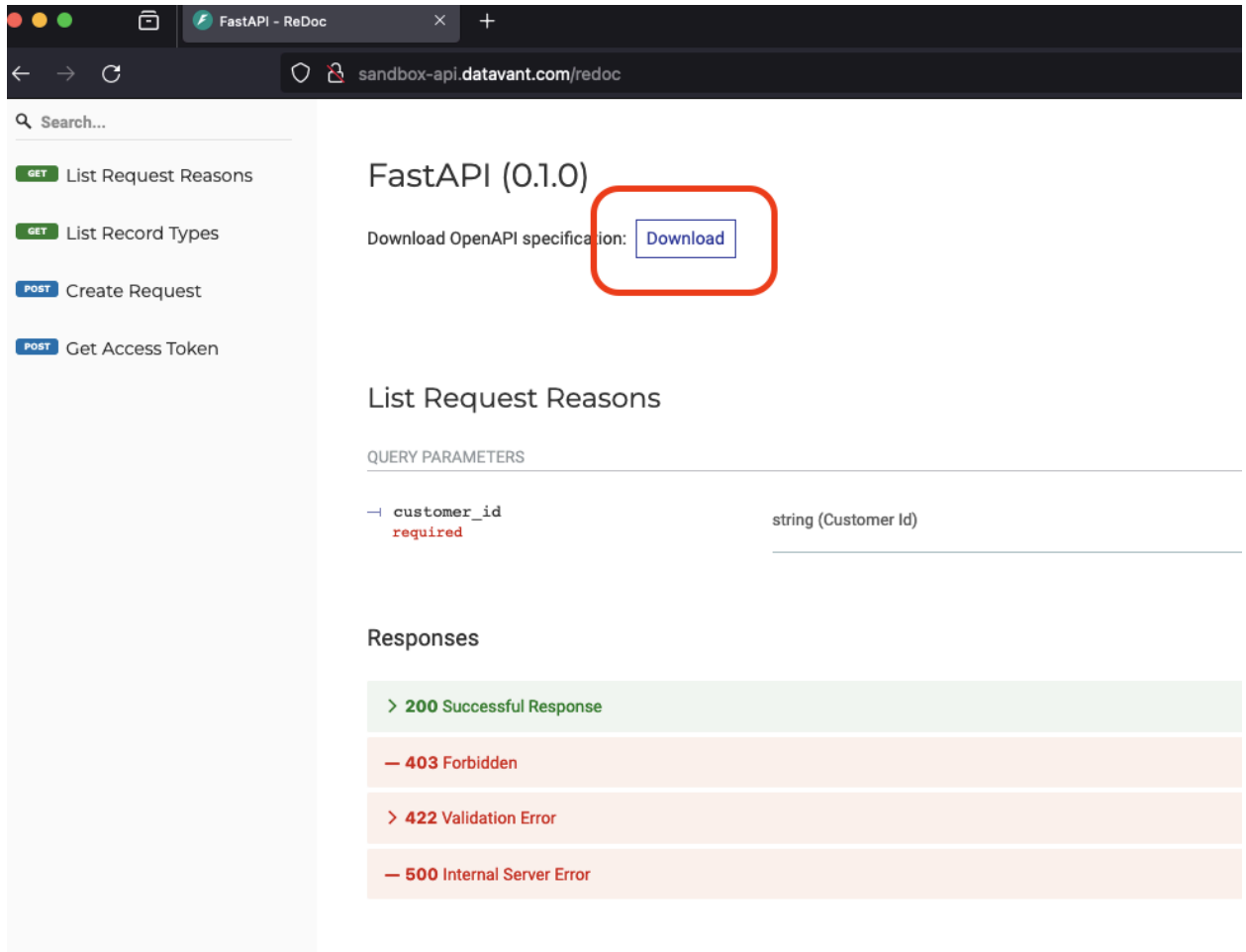
```
curl -H "Authorization: Bearer $TOKEN" \
  -H "Content-Type: application/json" \
  -X PUT https://sandbox-api.datavant.com/v1/request/12345/cancel \
  -d '{
    "reason": "cancellation reason"
  }'
```

Sample successful response: 204 No Content

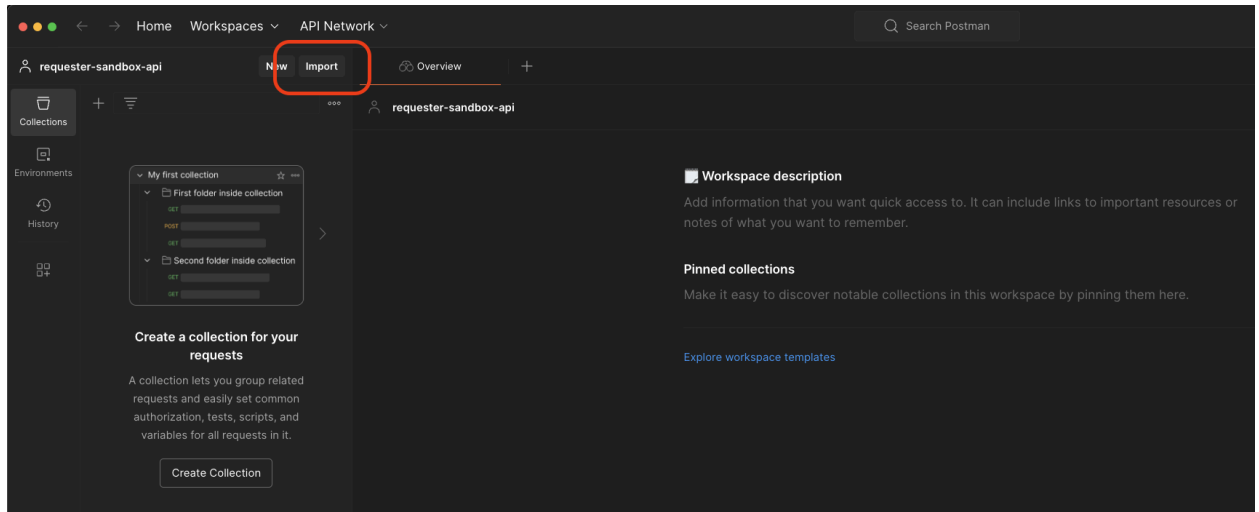
Setting up Postman

If you prefer to use Postman to call the API, you can use the steps below to configure a collection in Postman:

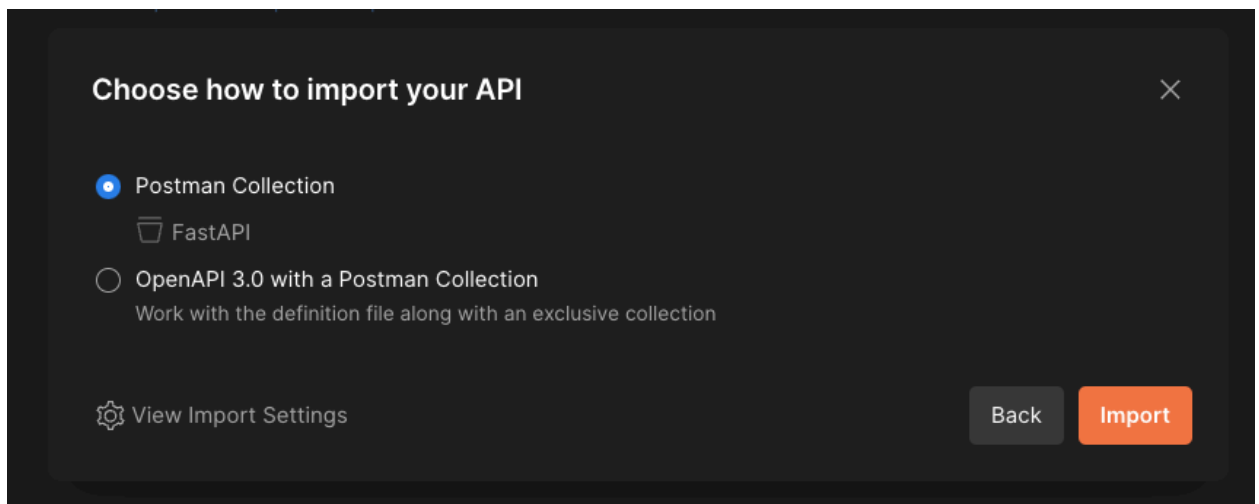
1. Go to <https://requester-api.datavant.com/redoc> and click on the Download button to get a json file containing the service's OpenAPI spec.



2. In a Postman workspace, click the Import button. Then select the json file you downloaded during step 1.

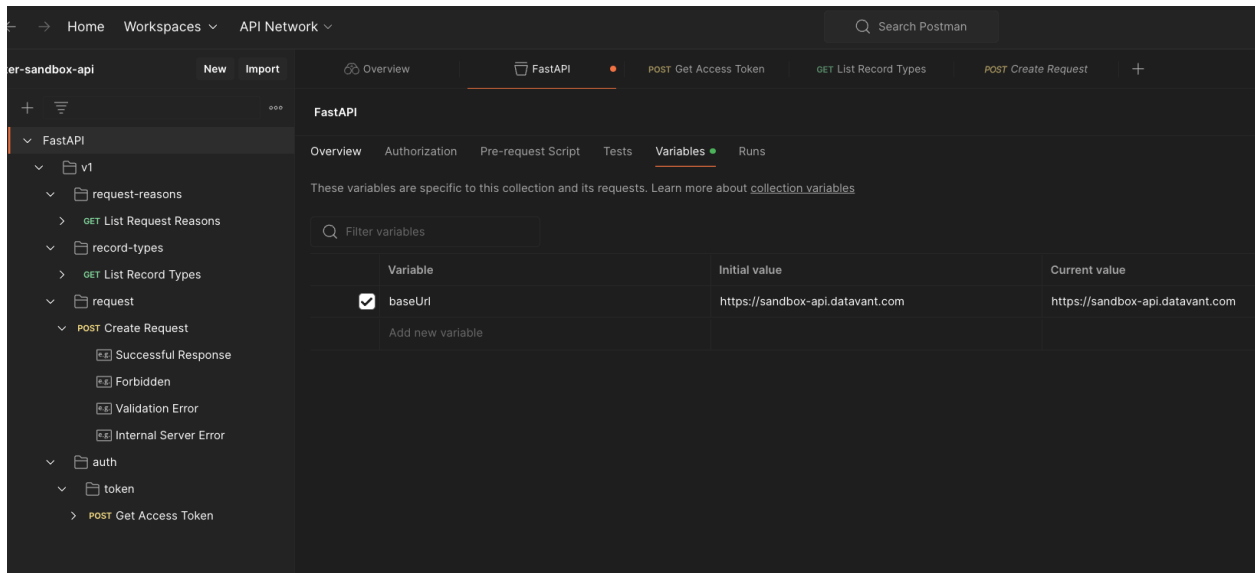


3. When prompted to choose how to import the API, select the first option to import as a Postman Collection.

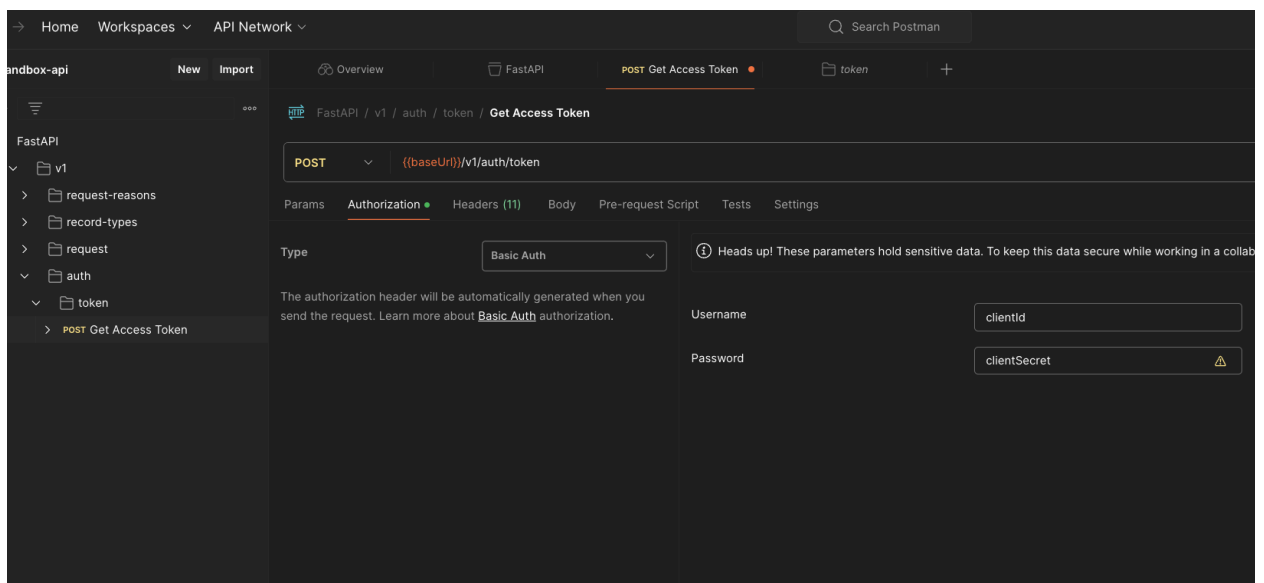


4. You should now see the API collection show up under FastAPI. Select the top level directory, then click on variables and be sure to set the baseUrl to <https://requester-api.datavant.com>. The value should have no trailing slash and

should be set in both initial and current value.

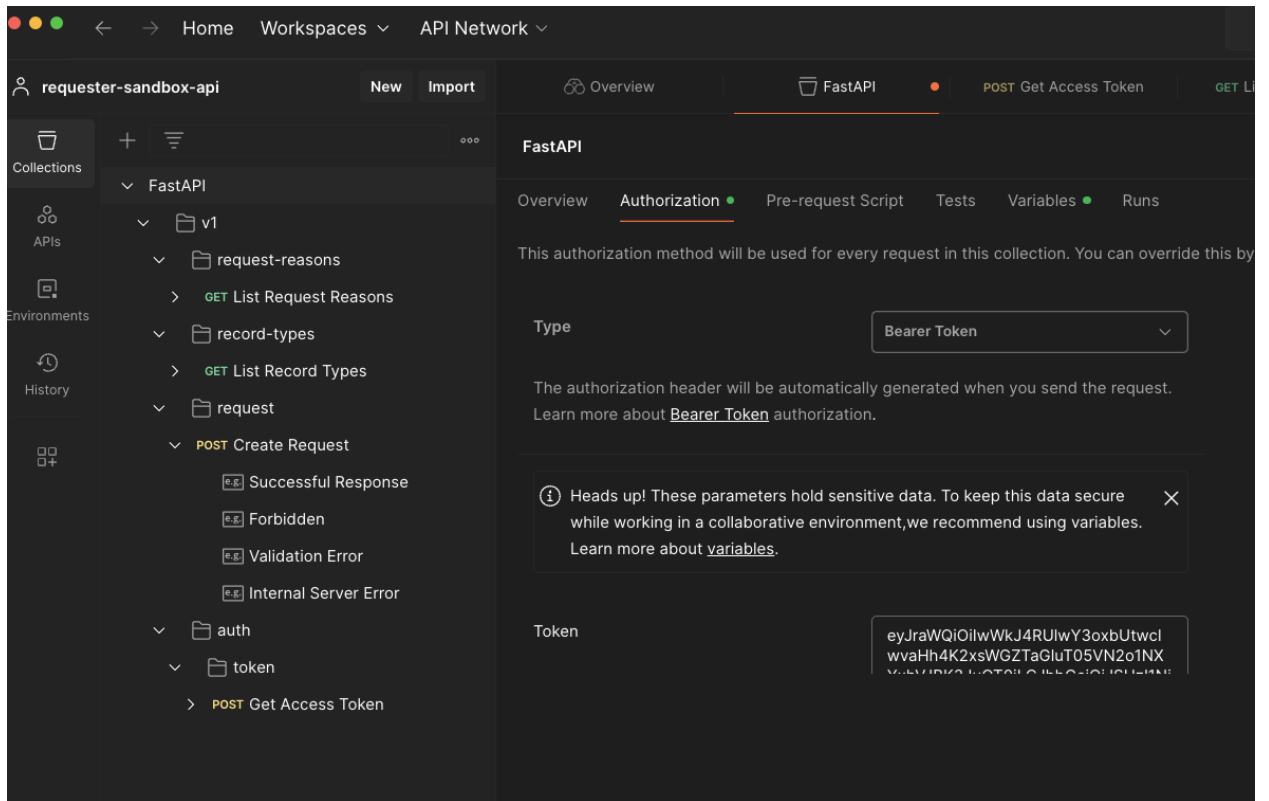


5. Generate a bearer token by calling the `/v1/auth/token` endpoint. Click on Get Access Token, navigate to the Authorization tab, and select Basic Auth as type, and then fill in your client ID and secret. Call the API to get a bearer token.



6. Now go back to the top level of the API collection. Go to the Authorization tab and choose Bearer Token as type. Paste the token you got from step 5 into the

field labeled Token.



7. You should now be able to call the APIs through Postman. Make sure you choose to Inherit auth from parent for all other API calls.

