

API INTEGRATION TECHNICAL GUIDE

Integrate Tebra with Third- Party Applications Using the Tebra Web Services API 2.1

**Updated: April 2025**

Introduction

### Welcome to Tebra’s guide to integrating Tebra with third-party applications using the Tebra Web Services API! This guide shows you how to build software applications that access the Tebra Web Services API and provides a technical reference guide to the operations you can perform.

The Tebra Web Services API is an application programming interface that enables computer programs to access Tebra data and functionality by communicating with Tebra servers over the Internet. The Tebra Web Services API is built on the latest standards-based technologies used for web-based software integration including Simple Object Access Protocol (SOAP), Extensible Markup Language (XML), and Web Services Description Language (WSDL). This collection of technologies is commonly referred to as a “web services” interface.

With the Tebra Web Services API, you can perform the following operations:

* Retrieve data from different types of records in Tebra, including appointments, charges, patients, payments, procedure codes, providers, service locations, and transactions
* Insert different types of new records in Tebra, including appointments, patients, encounters, and payments
* Update different types of records in Tebra, including appointments, encounter status, and patients
* Remove appointment records in Tebra The Tebra Web Services API can be used to:
* Integrate patient and charge data from an electronic medical records (EMR) system with Tebra
* Interface financial data to be exported into an accounting system, such as QuickBooks
* Create your own computer programs to import data into Tebra
* And much more…

A triangle with a exclamation mark on it  Description automatically generated Important Note: This guide is written for a technical audience. The information in this guide is intended to be used by IT staff or consultants affiliated with Tebra customers or software developers affiliated with third-party software companies seeking to integrate their products with Tebra.

**Table of Contents**

1. [Configuring Security and Access 5](#_bookmark0)
   1. [Getting Your Customer Key 5](#_bookmark1)
   2. [Granting Security Permissions 6](#_bookmark2)
2. [Using the Tebra Web Service API 7](#_bookmark3)
   1. [Connecting to the Tebra Web Service API 7](#_bookmark4)
   2. [XML Special Characters 7](#_bookmark5)
   3. [The RequestHeader Object 8](#_bookmark6)
   4. [The ErrorResponse Object 8](#_bookmark7)
   5. [The SecurityResponse Object 8](#_bookmark8)
3. [General Guidelines on Consuming Tebra API 9](#_bookmark9)
   1. [Get Operations Field Request 9](#_bookmark10)
   2. [Get Operations Filters 9](#_bookmark11)
   3. [Polling Frequency 9](#_bookmark12)
   4. [Query API Afterhours 11](#_bookmark13)
4. [Understanding the Operations 11](#_bookmark14)
   1. [Get Appointment 11](#_bookmark15)
   2. [Get Appointments 14](#_bookmark16)
   3. [Get Charges 19](#_bookmark17)
   4. [Get Encounter Details 31](#_bookmark18)
   5. [Get Patient 35](#_bookmark19)
   6. [Get Patients 45](#_bookmark20)
   7. [Get Payments 60](#_bookmark21)
   8. [Get Practices 62](#_bookmark22)
   9. [Get Procedure Code 64](#_bookmark23)
   10. [Get Providers 65](#_bookmark24)
   11. [Get Service Locations 67](#_bookmark25)
   12. [Get Transactions 69](#_bookmark26)
   13. [Create Appointment 71](#_bookmark28)
   14. [Create Document 75](#_bookmark29)
   15. [Create Encounter 78](#_bookmark31)
   16. [Create Patient 84](#_bookmark32)
   17. [Create Payments 92](#_bookmark33)
   18. [Update Appointment 94](#_bookmark34)
   19. [Update Encounter Status 99](#_bookmark35)
   20. [Update Patient 100](#_bookmark36)
   21. [Delete Appointment 109](#_bookmark37)
   22. [Delete Document 110](#_bookmark38)
5. [API Support 110](#_bookmark41)
6. [API Guide Changelog 111](#_bookmark42)

[April 2025 111](#_bookmark43)

[February 2025 112](#_bookmark44)

[December 2024 112](#_bookmark45)

[November 2024 113](#_bookmark46)

[October 2024 115](#_bookmark47)

# Configuring Security and Access

This topic provides instructions to get your customer key and how to grant the security permissions required by the Tebra Web Services API.

## Getting Your Customer Key

For added security, Tebra requires an account-specific customer key to access your data outside of Tebra. When accessing data through the Tebra Web Services API, you must use the customer key with your Tebra login and password.

To get access to the customer key, a System Administrator for the account needs to create a Customer Care case for the [request](https://helpme.tebra.com/Tebra_PM/01_Configure_System/Customer_Key/Get_Customer_Key#Request_Customer_Key).

|  |  |
| --- | --- |
| Once the request is completed for the account, the *Get Customer Key* option is available through My Account. A user with a System Administrator role can access the customer key by following the steps below.   1. Log into [My Account](https://help.kareo.com/login) with the user login email and password associated with the Tebra account. The *My Account* page opens. 2. Click **Get Customer Key**. The *Get Customer Key* page opens. |  |
| 3. The customer key displays next to *Your key*. |  |

## Granting Security Permissions

To keep your data secure, a user with a System Administrator role must configure the permissions in Tebra before you can perform any operations using the API. Follow the appropriate steps below to grant user permissions.

|  |  |
| --- | --- |
| **For Tebra accounts created after May 2016:**   1. Log into the Desktop Application (PM). 2. Click **Settings** > **User Accounts**. The *User Accounts* window opens. 3. Click on the user's name. The *Edit User*   window opens.   1. Click to select “System Admin”. 2. Click **Save User** when finished. |  |

|  |  |
| --- | --- |
| **For Tebra billing company accounts and accounts created before May 2016:**   1. Log into the Desktop Application (PM). 2. Click **Settings** > **User Accounts**. The *User Accounts* window opens. 3. Click on the user's name. The *Account details* display. 4. Click the *Permissions* tab. 5. Click **Account Administrator**. Then,   enter “Admin” to confirm and continue.   1. Click **Save Changes** when finished. |  |

# Using the Tebra Web Service API

This topic provides general guidelines on how to use the Tebra Web Service API.

## Connecting to the Tebra Web Service API

The Tebra Web Service API provides object schemas that can be downloaded into popular development tools (e.g., SoapUI) and enables developers to use structured objects for the request and response data used by each operation. Use the URL below to connect to the Tebra Web Services API.

<https://webservice.kareo.com/services/soap/2.1/KareoServices.svc?singleWsdl>

## XML Special Characters

There is a set of special characters that are used in Extensible Markup Language (XML) to introduce an entity reference; therefore, they cannot be used directly to represent data in the XML file. The solution to this limitation is to use the escaped form (a special character reference) instead of the actual character. This is important for all fields, especially the Password field. If the escaped form of a special character is not used, it cannot be correctly parsed, and our authentication service will not recognize it.

|  |  |  |
| --- | --- | --- |
| NAME | SPECIAL CHARACTER | ESCAPED FORM |
| Ampersand | & | &amp; |
| Less than | < | &lt; |
| Greater than | > | &gt; |
| Quote, Quotation Mark | “ | &quot; |
| Apostrophe | ‘ | &apos; |

## The RequestHeader Object

The RequestHeader object is required in every call to our services. This object contains the following fields:

* + - CustomerKey: This is the customer key associated with your Tebra account.
    - User: This is the login for an authorized user account in Tebra.
    - Password: This is the password for an authorized user account in Tebra.

## The ErrorResponse Object

The ErrorResponse object is returned in the response to every call to our services. This object contains the following fields:

* + - IsError: This indicates whether or not there was an error with the call to the Tebra service.
    - ErrorMessage: This contains an error message when IsError is true.
    - StackTrace: This occasionally contains additional information when IsError is true.

## The SecurityResponse Object

The SecurityResponse object is returned in the response to every call to our services (except in some cases when there is an error). This object contains the following fields:

* + - SecurityResultSuccess: This indicates whether or not the security check was a success. True would indicate that there was an issue with security.
    - SecurityResult: This contains a message that has more detail on the results of the security check.
    - Authenticated: Returns true if the login and password was valid.
    - Authorized: Returns true if the user is authorized to perform the operation.
    - CustomerId: Returns the unique identifier of the customer’s account.
    - PracticesAuthorized: Returns an array of practices the user has access to.
    - PermissionsMissing: Returns an array of the permissions missing to execute the request.

# General Guidelines on Consuming Tebra API

This topic provides general guidelines on best practices when consuming the Tebra Web Services API.

## Get Operations Field Request

Only return fields you intend to use in the Get Operations. Most of the request objects for our Get operations accept a parameter named Fields that will take in a FieldsToReturn object specific to that call. An example would be the GetAppointmentsReq object has a field named Fields that takes the AppointmentFieldsToReturn object.

The FieldsToReturn object allows you to indicate which fields you are interested in from the call. The more precise you are with the fields, the smaller the response will be from our API reducing the bandwidth required to complete the call.

## Get Operations Filters

Most of the request objects for our Get operations accept a parameter named Filter that will take in a Filter object specific to that call. An example would be the GetPatientsReq object has a field named Filter that takes the PatientFilter object.

The Filter object allows you to limit the number of rows returned from the call. The best approach to filtering responses is to use PracticeName for all Get operations. The more precise you are with this the smaller the response will be from our API reducing the bandwidth and processing time required to complete the call.

To avoid errors, at least one filter must be used for Get operations. If dates are used, the start and end dates must be used. For example, if you use FromCreateDate, you must also use ToCreateDate.

## Polling Frequency

This is a general guideline to try and poll as infrequently as possible (e.g., every 2 hours instead of every 5 minutes) to reduce overall load on our systems, especially in scenarios where most calls return nothing new to process. In general, narrow your calls using the two suggestions above to have your call return in an acceptable amount of time.

To ensure that all users of Tebra's platform can have a consistent and reliable experience, the following rate limits are in effect:

* GetAllPatients: 1 call every 5 seconds
* GetAppointment: 1 call every ½ second
* GetAppointments: 1 call per second
* GetCharges: 1 call per second
* GetEncounterDetails: 1 call every ½ second
* GetExternalVendors: 1 call per second
* GetPatient: 1 call every ¼ second
* GetPatients: 1 call per second
* GetPayments: 1 call per second
* GetPractices: 1 call every ½ second
* GetProcedureCode: 1 call every ½ second
* GetProviders: 1 call every ½ second
* GetServiceLocations: 1 call every ½ second
* GetThrottles: 1 call every 5 seconds
* GetTransactions: 1 call per second
* CreateAppointment: 1 call every ½ second
* CreateEncounter: 1 call every ½ second
* CreatePatient: 1 call every ½ second
* CreatePayments: 1 call every ½ second
* UpdateAppointment: 1 call every ½ second
* UpdateEncounterStatus: 1 call every ½ second
* UpdatePatient: 1 call per second
* DeleteAppointment: 1 call every ½ second
* SearchPatient: 1 call every ¼ second

Rate limits are measured at the Tebra account level (Account ID). Should limits be exceeded, the system will respond with an error message specifying the endpoint and rate limit. For example, “429: GetPatients endpoint requested more than allowed over time interval 1000 milliseconds. Please wait to try again.”

It is recommended to either implement a delay between calls and/or a retry procedure when appropriate.

Which endpoints have rate limits implemented, and the respective limits, are subject to change.

## Query API Afterhours

The performance of our API is generally better during off hours. If it is not critical to run your integration with the Tebra Web Services API during business hours, schedule it during afterhours. This prevents your account from experiencing possible degraded performance.

# Understanding the Operations

This topic provides a detailed definition of the operations that can be performed with Tebra Web Services API.

## Get Appointment

This operation returns the details of an existing appointment with the provided appointment ID.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| AppointmentID | The unique identifier of the appointment. | Yes |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PracticeID | The unique identifier of the practice related to this appointment. | Settings > Company > Find Practice > Edit Practice |
| ServiceLocationID | The unique identifier of the service location related to this appointment. | N/A |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| AppointmentStatus | Available values:   * Unknown * Scheduled * ReminderSent * Confirmed * CheckedIn * Roomed * CheckedOut * NeedsReschedule * ReadyToBeSeen * NoShow * Cancelled * Rescheduled * Tentative | Appointments > Find Appointment |
| StartTime | The start time of the appointment in UTC time standard (e.g.,2020-01-24T22:00:00.000Z). | Appointments > Find Appointment |
| EndTime | The end time of the appointment in UTC time standard (e.g., 2020-01-24T22:30:00.000Z). | Appointments > Find Appointment |
| IsRecurring | Defines if the appointment is recurring. | Appointments > Find Appointment |
| OccurrenceID | The unique identifier of the occurrence. | Appointments > Find Appointment |
| PatientSummary | Structure described below. | Patients > Find Patient > Edit Patient |
| AppointmentReasonID | The unique identifier of the appointment reason. | Appointments > Appointment Reasons > Edit Appointment Reason |
| RecurrenceRule | Structure described below. | Appointments > Find Appointment > Appointment Details > Recurrence |
| ProviderID | The unique identifier of the provider. | Settings > Find Provider > Edit Provider |
| ResourceID | The unique identifier of the resource. | Appointments > Find Appointment |
| Notes | The appointment notes. | Appointments > Find Appointment > Appointment Details |
| ResourceIDs | The list of resource unique identifiers. | N/A |
| AppointmentType | Available values: U = Unknown  P= Patient O = Other | Appointments > Find Appointment |
| WasCreatedOnline | Defines if the appointment is created online. | N/A |
| InsurancePolicyAuthorizationID | The unique identifier of the insurance policy authorization. | Appointments > Find Appointment > Appointment Details > Authorization... |
| PatientCaseID | The unique identifier of the patient case. | Appointments > Find Appointment > Appointment Details > Case... |
| AppointmentName | The name of the appointment. | Appointments > Find Appointment |
| IsGroupAppointment | Defines if the appointment is for a group. | N/A |
| MaxAttendees | Defines the maximum number of attendees. | N/A |
| AttendeesCount | The number of attendees in the appointment. | N/A |
| PatientSummaries | List of patient summary structure defined below: | Patients > Find Patient > Edit Patient |
| ForRecare | Defines if the appointment is for recare. | N/A |
| PatientID | The unique identifier of the patient. | Patients > Find Patient > Edit Patient |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PracticeID | The unique identifier of the practice. | Settings > Company > Find Practice > Edit Practice |
| GenderID | The unique identifier of the gender. | Patients > Find Patient > Edit Patient |
| DateOfBirth | The date of birth of the patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient |
| FirstName | The first name of the patient. | Patients > Find Patient > Edit Patient |
| MiddleName | The middle name of the patient. | Patients > Find Patient > Edit Patient |
| LastName | The last name of the patient. | Patients > Find Patient > Edit Patient |
| Email | The email address of the patient. | Patients > Find Patient > Edit Patient |
| HomePhone | The home phone number of the patient (e.g., (706) 223-3445). | Patients > Find Patient > Edit Patient |
| WorkPhone | The work phone number of the patient (e.g., (706) 223-3445). | Patients > Find Patient > Edit Patient |
| MobilePhone | The mobile phone number of the patient (e.g., (706) 223-3445). | Patients > Find Patient > Edit Patient |
| PreferredPhoneType | The preferred phone type of the patient (e.g., Mobile Phone). | N/A |
| WorkEmail | The work email address of the patient. | Patients > Find Patient > Edit Patient |
| OtherEmail | The other email address of the patient. | Patients > Find Patient > Edit Patient |
| PreferredEmailType | The preferred email type of the patient (e.g., Work Email). | N/A |
| Guid | GUID of the Patient Summary | N/A |
| RecurrenceRuleID | The unique identifier of the recurrence rule. | N/A |
| AppointmentID | The unique identifier of the appointment. | Appointments > Find Appointment |
| StartDate | The start date and time of the appointment recurrence rule in UTC time standard. | Appointments > Find Appointment > Appointment Details > Recurrence |
| EndDate | The start date and time of the appointment recurrence rule in UTC time standard. | Appointments > Find Appointment > Appointment Details > Recurrence |
| NumOccurrences | The number of appointment occurrences. | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayInterval | Day interval of the appointment recurrence rule (e.g., 8 - Each eight days). | Appointments > Find Appointment > Appointment Details > Recurrence |
| MonthInterval | Month interval of the appointment recurrence rule (e.g., 3 - Each three months). | Appointments > Find Appointment > Appointment Details > Recurrence |
| MonthOfYear | Month of the year of the appointment recurrence rule (e.g., 10 - Month of October). | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfMonth | Day of the month of the appointment recurrence rule (e.g., 25 -Day 25 of the month). | Appointments > Find Appointment > Appointment Details > Recurrence |
| TypeOfDay | Available values:   * Unknown * Weekday * Weekend | Appointments > Find Appointment > Appointment Details > Recurrence |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| DayOfWeekMonthlyOrdinal | Available values:   * Unknown * First * Second * Third * Fourth * Last | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfWeekMonthlyOrdinalFlags | Number that represents the weeks of month (e.g., 21 = 10101B - First, Third and Last Week) | N/A |
| TypeOfDayMonthlyOrdinal | Available values:   * Unknown * First * Second * Third * Fourth * Last | Appointments > Find Appointment > Appointment Details > Recurrence |
| TypeOfDayMonthlyOrdinalFlags | Number that represents the weeks of month:   * If TypeOfDay is Weekday (e.g., 17 = 10001B * First and Last days of weekdays) * If TypeOfDay is Weekend (e.g., 3 = 00011B - First and Second days of weekend) | N/A |
| DayOfWeek | Available values:   * Sunday * Monday * Tuesday * Wednesday * Thursday * Friday * Saturday | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfWeekFlags | Number that represents the days of week (e.g., 35 = 0100011B - Monday, Tuesday and Saturday). | N/A |
| NumberOfTimes | The number of times of to apply the recurrence rule (e.g., 5). | Appointments > Find Appointment > Appointment Details > Recurrence |

## Get Appointments

This operation returns a list of appointments that match the criteria included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| PracticeName | The name of the practice related to the appointment created. | Yes |
| FromCreatedDate | The starting date the appointment was created (e.g., YYYY-MM-DD). | No |
| ToCreatedDate | The ending date the appointment was created (e.g., YYYY-MM-DD). | No |
| FromLastModifiedDate | The starting date the appointment was last modified (e.g., YYYY-MM-DD). | No |
| ToLastModifiedDate | The ending date the appointment was last modified (e.g., YYYY-MM-DD). | No |
| Type | Available values: U = Unknown  P = Patient O = Other | No |
| ConfirmationStatus | Available values:   * Confirmed * Check-in * No-show * Check-out * Rescheduled * Scheduled * Cancelled | No |
| ServiceLocationName | The location of the appointment. | No |
| PatientID | The unique identifier for the patient related to this appointment. | No |
| PatientFullName | The full name of the patient related to this appointment. | No |
| PatientCasePayerScenario | The payer scenario for the case related to this appointment. | No |
| StartDate | The start date and time of this appointment.  *Note:* If StartDate is not provided, the default is 7 days prior to today’s date. If StartDate and EndDate is not provided, the default is 3 days prior to today’s date. If FromCreatedDate and ToCreatedDate or FromLastModifiedDate and ToLastModifiedDate is specified, the StartDate is not overridden. | No |
| EndDate | The end date and time for this appointment.  *Note:* If EndDate is not provided, the default is 7 days from the start date. If FromCreatedDate and ToCreatedDate or FromLastModifiedDate and ToLastModifiedDate is specified, the EndDate is not overridden. | No |
| AppointmentReason | The reason entered for this appointment. | No |
| TimeZoneOffsetFromGMT | The time zone offset from GMT of the client computer accessing the API. | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ID | The unique identifier of the appointment. | Appointments > Find Appointment |
| CreatedDate | The date the appointment was created (e.g., YYYY-MM- DD). | N/A |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| LastModifiedDate | The date the appointment was last modified (e.g., YYYY- MM-DD). | N/A |
| PracticeName | The name of the practice related to this appointment. | Settings > Practice Information |
| Type | Available values:   * U = Unknown * P = Patient * O = Other | Appointments > Find Appointment |
| ConfirmationStatus | The status of the appointment. | Appointments > Find Appointment |
| ServiceLocationName | The location of the appointment. | Appointments > Find Appointment |
| PatientID | The unique identifier for the patient related to this appointment. | Patients > Find Patient > Edit Patient |
| PatientFullName | The full name of the patient related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| PatientCaseID | The unique identifier for the case related to this appointment. | N/A |
| PatientCaseName | The name of the case related to this appointment. | Appointments > Find Appointment  > Appointment Details > Case... |
| PatientCasePayerScenario | The payer scenario for the case related to this appointment. | Patients > Find Patient > Edit Patient > Cases |
| AuthorizationID | The unique identifier for the authorization related to this appointment. | N/A |
| AuthorizationNumber | The authorization number related to this appointment. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| AuthorizationStartDate | The authorization start date related to this appointment (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| AuthorizationEndDate | The authorization end date related to this appointment (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| AuthorizationInsurancePlan | The insurance plan related to the authorization related to this appointment. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| StartDate | The start date and time of this appointment. | Appointments > Find Appointment |
| EndDate | The end date and time for this appointment. | Appointments > Find Appointment |
| AllDay | If this is an all-day appointment, then true. Otherwise, false. | Appointments > Find Appointment |
| Recurring | If this is a recurring appointment, then true. Otherwise, false. | Appointments > Find Appointment |
| AppointmentReason 1 | The first reason entered for this appointment. | Appointments > Find Appointment |
| ResourceName1 | The first provider or scheduling resource related to this appointment. | Appointments > Find Appointment |
| Notes | The notes or comments related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| PracticeID | The unique identifier of the practice related to this appointment. | Settings > Company > Find Practice  > Edit Practice |
| AppointmentReason2 | The second reason entered for this appointment. | Appointments > Find Appointment  > Appointment Details |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| AppointmentReason3 | The third reason entered for this appointment. | Appointments > Find Appointment  > Appointment Details |
| AppointmentReason4 | The fourth reason entered for this appointment. | Appointments > Find Appointment  > Appointment Details |
| AppointmentReason5 | The fifth reason entered for this appointment. | Appointments > Find Appointment  > Appointment Details |
| AppointmentReason6 | The sixth reason entered for this appointment. | Appointments > Find Appointment  > Appointment Details |
| AppointmentReason7 | The seventh reason entered for this appointment. | Appointments > Find Appointment  > Appointment Details |
| AppointmentReason8 | The eighth reason entered for this appointment. | Appointments > Find Appointment  > Appointment Details |
| AppointmentReason9 | The ninth reason entered for this appointment. | Appointments > Find Appointment  > Appointment Details |
| AppointmentReason10 | The tenth reason entered for this appointment. | Appointments > Find Appointment  > Appointment Details |
| ResourceName2 | The second provider or scheduling resource related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| ResourceName3 | The third provider or scheduling resource related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| ResourceName4 | The fourth provider or scheduling resource related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| ResourceName5 | The fifth provider or scheduling resource related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| ResourceName6 | The sixth provider or scheduling resource related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| ResourceName7 | The seventh provider or scheduling resource related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| ResourceName8 | The eighth provider or scheduling resource related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| ResourceName9 | The ninth provider or scheduling resource related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| ResourceName10 | The tenth provider or scheduling resource related to this appointment. | Appointments > Find Appointment  > Appointment Details |
| ServiceLocationID | The unique identifier for the location related to this appointment. | N/A |
| AppointmentDuration | The duration, in minutes, of the appointment. | N/A |
| AppointmentReasonID1 | The unique identifier of the first reason entered for this appointment. | N/A |
| AppointmentReasonID2 | The unique identifier of the second reason entered for this appointment. | N/A |
| AppointmentReasonID3 | The unique identifier of the third reason entered for this appointment. | N/A |
| AppointmentReasonID4 | The unique identifier of the fourth reason entered for this appointment. | N/A |
| AppointmentReasonID5 | The unique identifier of the fifth reason entered for this appointment. | N/A |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| AppointmentReasonID6 | The unique identifier of the sixth reason entered for this appointment. | N/A |
| AppointmentReasonID7 | The unique identifier of the seventh reason entered for this appointment. | N/A |
| AppointmentReasonID8 | The unique identifier of the eighth reason entered for this appointment. | N/A |
| AppointmentReasonID9 | The unique identifier of the ninth reason entered for this appointment. | N/A |
| AppointmentReasonID10 | The unique identifier of the tenth reason entered for this appointment. | N/A |
| ResourceID1 | The unique identifier of the first provider or scheduling resource related to this appointment. | N/A |
| ResourceID2 | The unique identifier of the second provider or scheduling resource related to this appointment. | N/A |
| ResourceID3 | The unique identifier of the third provider or scheduling resource related to this appointment. | N/A |
| ResourceID4 | The unique identifier of the fourth provider or scheduling resource related to this appointment. | N/A |
| ResourceID5 | The unique identifier of the fifth provider or scheduling resource related to this appointment. | N/A |
| ResourceID6 | The unique identifier of the sixth provider or scheduling resource related to this appointment. | N/A |
| ResourceID7 | The unique identifier of the seventh provider or scheduling resource related to this appointment. | N/A |
| ResourceID8 | The unique identifier of the eighth provider or scheduling resource related to this appointment. | N/A |
| ResourceID9 | The unique identifier of the ninth provider or scheduling resource related to this appointment. | N/A |
| ResourceID10 | The unique identifier of the tenth provider or scheduling resource related to this appointment. | N/A |
| ResourceTypeID1 | The unique identifier of the first resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID2 | The unique identifier of the second resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID3 | The unique identifier of the third resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID4 | The unique identifier of the fourth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ResourceTypeID5 | The unique identifier of the fifth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID6 | The unique identifier of the sixth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID7 | The unique identifier of the seventh resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID8 | The unique identifier of the eighth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID9 | The unique identifier of the ninth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID10 | The unique identifier of the tenth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |

## Get Charges

This operation returns a list of charges that match the criteria included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

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| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |

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| FIELD NAME | DESCRIPTION | REQUIRED |
| PracticeName | The name of the practice related to this charge. | Yes |
| FromCreatedDate | The date the encounter was created (e.g., YYYY-MM-DD).  *Note:* If FromCreatedDate is not provided the default is 7 days prior to ToCreatedDate. | No |
| ToCreatedDate | The date the encounter was created (e.g., YYYY-MM-DD).  *Note:* If ToCreatedDate is not provided the default is 7 days from FromCreatedDate. | No |
| FromLastModifiedDate | The date the claim was last modified (e.g., YYYY-MM-DD).  *Note:* If FromLastModifiedDate is not provided the default is 7 days prior to ToLastModifiedDate. | No |
| ToLastModifiedDate | The date the claim was last modified.  *Note:* If ToLastModifiedDate is not provided the default is 7 days from FromLastModifiedDate. | No |
| PatientName | The name of the patient related to this charge. | No |
| CasePayerScenario | The payer scenario of the case related to this charge. | No |
| FromServiceDate | The starting service date for charges (e.g., YYYY-MM-DD).  *Note:* If FromServiceDate is not provided the default is 7 days prior to ToServiceDate. | No |
| ToServiceDate | The ending service date for charges (e.g., YYYY-MM-DD).  *Note:* If ToServiceDate is not provided the default is 7 days from FromServiceDate. | No |
| FromPostingDate | The posting date of the encounter related to this charge (e.g., YYYY-MM-DD).  *Note:* If FromPostingDate is not provided the default is 7 days prior to ToPostingDate. | No |
| ToPostingDate | The posting date of the encounter related to this charge (e.g., YYYY-MM-DD).  *Note:* If ToPostingDate is not provided the default is 7 days from FromPostingDate. | No |
| BatchNumber | The batch number associated with the encounter related to this charge. | No |
| SchedulingProviderName | The name of the scheduling provider related to this charge. | No |
| RenderingProviderName | The name of the rendering provider related to this charge. | No |
| ReferringProviderName | The name of the referring physician related to this charge. | No |
| ServiceLocationName | The name of the service location related to this charge. | No |
| ProcedureCode | The procedure code related to this charge. | No |
| DiagnosisCode | The first diagnosis code related to this charge. | No |
| Status | The status of this charge. | No |
| BilledTo | The insurer or patient the charge to which the charge is currently assigned. | No |
| IncludeUnapprovedCharges | “T” to return charges associated with unapproved encounters. | No |
| EncounterStatus | Available values:  Draft = Not yet completed  Review = Completed, ready for approval Approved = Reviewed and approved Rejected = Needs clarification or corrections | No |

### The Response

The following information will be returned with the response for this operation.

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ID | The unique identifier of the claim. | Encounters > Track Claim Status |
| CreatedDate | The date the claim was created (e.g., YYYY- MM-DD). | N/A |
| LastModifiedDate | The date the claim was last modified (e.g., YYYY-MM-DD). | N/A |
| PracticeName | The name of the practice related to this charge. | Settings > Practice Information |
| EncounterID | The unique identifier of the encounter related to this charge. | Encounters > Find Encounter |
| PatientID | The unique identifier of the patient related to this charge. | Patients > Find Patient > Edit Patient |
| PatientName | The name of the patient related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| PatientDateOfBirth | The date of birth of the patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient |
| CaseName | The name of the case related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| CasePayerScenario | The payer scenario of the case related to this charge. | Patients > Find Patient > Edit Patient > Cases |
| ServiceStartDate | The service start date of this charge (e.g., YYYY-MM-DD). | Encounters > Find Encounter  > Edit Encounter |
| ServiceEndDate | The service end date of this charge (e.g., YYYY-MM-DD). | Encounters > Find Encounter  > Edit Encounter |
| PostingDate | The posting date of the encounter related to this charge (e.g., YYYY-MM-DD). | Encounters > Find Encounter  > Edit Encounter |
| BatchNumber | The batch number associated with the encounter related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| SchedulingProviderName | The name of the scheduling provider related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| RenderingProviderName | The name of the rendering provider related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| SupervisingProviderName | The name of the supervising provider related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| ReferringProviderName | The name of the referring physician related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| ServiceLocationName | The name of the service location related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| ProcedureCode | The procedure code related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| ProcedureName | The name of the procedure related to this charge. | Encounters > Find Encounter  > Edit Encounter |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ProcedureCodeCategory | The category of the procedure related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| ProcedureModifier1 | The first modifier of the procedure related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| ProcedureModifier2 | The second modifier of the procedure related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| ProcedureModifier3 | The third modifier of the procedure related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| ProcedureModifier4 | The fourth modifier of the procedure related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| DiagnosisCode1 | The first diagnosis code related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| DiagnosisCode2 | The second diagnosis code related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| DiagnosisCode3 | The third diagnosis code related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| DiagnosisCode4 | The fourth diagnosis code related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| Units | The number of units of the procedure related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| UnitCharge | The unit charge of the procedure related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| TotalCharges | The total charges related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| AdjustedCharges | The total charges minus all adjustments related to this charge. | Encounters > Track Claim Status |
| Receipts | The total payments applied to this charge. | Encounters > Track Claim Status |
| PatientBalance | The patient balance related to this charge. | Encounters > Track Claim Status |
| InsuranceBalance | The insurance balanced related to this charge. | Encounters > Track Claim Status |
| TotalBalance | The total balance related to this charge. | Encounters > Track Claim Status |
| PrimaryInsuranceBilledCompanyName | If primary payment is posted by user, then this field is associated with the primary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the primary insurance policy on the case associated with the encounter. | Encounters > Track Claim Status > Edit Claim |
| PrimaryInsuranceBilledPlanName | If primary payment is posted by user, then this field is associated with the primary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the primary insurance policy on the case associated with the encounter. | Encounters > Track Claim Status > Edit Claim |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| SecondaryInsuranceBilledCompanyName | If secondary payment is posted by user, then this field is associated with the secondary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the secondary insurance policy on the case associated with the encounter. | Encounters > Track Claim Status > Edit Claim |
| SecondaryInsuranceBilledPlanName | If secondary payment is posted by user, then this field is associated with the secondary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the secondary insurance policy on the case associated with the encounter. | Encounters > Track Claim Status > Edit Claim |
| BilledTo | The party that was last billed for this charge. | Encounters > Track Claim Status > Edit Claim |
| Status | The status of this charge:   * Completed * Pending * Ready * Error-Rejection * Error – Denial * Error – No Response * Undefined | Encounters > Track Claim Status |
| PracticeID | The unique identifier associated with the practice related to this charge. | Settings > Company > Find Practice > Edit Practice |
| AppointmentID | The unique identifier associated with the appointment related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| SchedulingProviderID | The unique identifier associated with the scheduling provider related to this charge. | Settings > Providers > Edit Provider |
| RenderingProviderID | The unique identifier associated with the rendering provider related to this charge. | Settings > Providers > Edit Provider |
| SupervisingProviderID | The unique identifier associated with the supervising provider related to this charge. | Settings > Providers > Edit Provider |
| ReferringProviderID | The unique identifier associated with the referring provider related to this charge. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| CopayAmount | The amount of the copay related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| CopayMethod | The copay payment method related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| CopayCategory | The copay payment category related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| CopayReference | The copay reference number related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| Minutes | The minutes related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| LineNote | The line note related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| RefCode | The reference code related to this charge. | Encounters > Find Encounter  > Edit Encounter |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| TypeOfService | The type of service insurance code related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| HospitalizationStartDate | The hospitalization start date related to this charge (e.g., YYYY-MM-DD). | Encounters > Find Encounter  > Edit Encounter |
| HospitalizationEndDate | The hospitalization end date related to this charge (e.g., YYYY-MM-DD). | Encounters > Find Encounter  > Edit Encounter |
| LocalUseBox10d | The local use box 10d custom insurance field related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| LocalUseBox19 | The local use box 19 custom insurance field related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| DoNotSendClaimElectronically | True if the claim should not be sent electronically. False otherwise. | Encounters > Find Encounter  > Edit Encounter |
| DoNotSendElectronicallyToSecondary | True if the claim should not be sent electronically to the secondary insurance. False otherwise. | Encounters > Find Encounter  > Edit Encounter |
| E-ClaimNoteType | The line note related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| E-ClaimNote | The line note related to this charge. | Encounters > Find Encounter  > Edit Encounter |
| ServiceLocationID | The unique identifier of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationBillingName | The billing name of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationPlaceofServiceCode | The place of service insurance code related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationPlaceOfServiceName | The name of the place of service insurance code related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationAddressLine1 | The first address line of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationAddressLine2 | The second address line of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationCity | The city of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationState | The state of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationCountry | The country of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationZipCode | The zip code of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |

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| FIELD NAME | DESCRIPTION | | WHERE TO FIND IN TEBRA |
| ServiceLocationPhone | The phone number of the service location related to this charge. | | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationPhoneExt | The phone number extension of the service location related to this charge. | | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationFax | The fax number of the service location related to this charge. | | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationFaxExt | The fax number extension of the service location related to this charge. | | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationNPI | The national provider identifier of the service location related to this charge. | | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationFacilityIDType | The facility ID type of the service location related to this charge. | | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationFacilityID | | The facility ID of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| ServiceLocationCLIANumber | | The CLIA number of the service location related to this charge. | Settings > Service Location > Find Service Location > Edit Service Location |
| AllowedAmount | | The allowed amount expected for this charge, based upon the active insurance contract settings. | Settings > Contracts and Fees > Contract Rates > Active Insurance Contract > Contract Rate |
| ExpectedAmount | | The allowed amount expected for this charge, based upon the active insurance contract settings. | Settings > Contracts and Fees > Contract Rates > Active Insurance Contract > Contract Rate |
| PrimaryInsuranceAddressLine1 | | The first address line of the insurance plan associated with the primary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsuranceAddressLine2 | | The second address line of the insurance plan associated with the primary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsuranceCity | | The city of the insurance plan associated with the primary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsuranceState | | The state of the insurance plan associated with the primary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsuranceCountry | | The country of the insurance plan associated with the primary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsuranceZipCode | | The zip code of the insurance plan associated with the primary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

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| FIELD NAME | DESCRIPTION | | WHERE TO FIND IN TEBRA |
| PrimaryInsuranceBatchID | | The unique identifier of the billing batch associated with the primary insurance policy on the case related to this charge. | N/A |
| PrimaryInsuranceFirstBilDate | | The date the charge was first billed to the primary insurance policy on the case related to this charge (e.g., YYYY-MM-DD). | Encounters > Track Claim Status > Edit Claim |
| PrimaryInsuranceLastBillDate | | The date the charge was last billed to the primary insurance policy on the case related to this charge (e.g., YYYY-MM-DD). | Encounters > Track Claim Status > Edit Claim |
| PrimaryInsurancePaymentID | | The unique identifier of the payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments |
| PrimaryInsurancePaymentPostingDate | | The posting date of the payment posted from the primary insurance policy on the case related to this charge (e.g., YYYY-MM- DD). | Encounters > Find Payments |
| PrimaryInsuranceAdjudicationDate | | The adjudication date of the payment posted from the primary insurance policy on the case related to this charge (e.g., YYYY-MM-DD). | Encounters > Find Payments |
| PrimaryInsurancePaymentRef | | The reference number of the payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments |
| PrimaryInsurancePaymentMethodDesc | | The payment method of the payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments |
| PrimaryInsurancePaymentCategoryDesc | | The category of the payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments |
| PrimaryInsuranceAllowed | | The allowed amount of the payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| PrimaryInsuranceContractAdjustment | | The amount of the contract adjustment of the payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| PrimaryInsuranceContractAdjustmentReason | | The reason of the contract adjustment of the payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| PrimaryInsuranceSecondaryAdjustment | | The amount of the secondary contract adjustment of the payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| PrimaryInsuranceSecondaryAdjustmentReason | | The reason of the secondary contract adjustment of the payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| PrimaryInsurancePayment | | The payment posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |

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| --- | --- | --- | --- |
| FIELD NAME | DESCRIPTION | | WHERE TO FIND IN TEBRA |
| PrimaryInsuranceDeductible | | The deductible posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| PrimaryInsuranceCoinsurance | | The coinsurance posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| PrimaryInsuranceCopay | | The copay posted from the primary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| SecondaryInsuranceAddressLine1 | | The first address line of the insurance plan associated with the secondary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsuranceAddressLine2 | | The second address line of the insurance plan associated with the secondary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsuranceCity | | The city of the insurance plan associated with the secondary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsuranceState | | The state of the insurance plan associated with the secondary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsuranceCountry | | The country of the insurance plan associated with the secondary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsuranceZipCode | | The zip code of the insurance plan associated with the secondary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsuranceBatchID | | The unique identifier of the billing batch associated with the secondary insurance policy on the case related to this charge. | N/A |
| SecondaryInsuranceFirstBillDate | | The date the charge was first billed to the secondary insurance policy on the case related to this charge (e.g., YYYY-MM-DD). | Encounters > Track Claim Status > Edit Claim |
| SecondaryInsuranceLastBillDate | | The date the charge was last billed to the secondary insurance policy on the case related to this charge (e.g., YYYY-MM-DD). | Encounters > Track Claim Status > Edit Claim |
| SecondaryInsurancePaymentID | | The unique identifier of the payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments |
| SecondaryInsurancePaymentPostingDate | | The posting date of the payment posted from the secondary insurance policy on the case related to this charge (e.g., YYYY-MM- DD). | Encounters > Find Payments |
| SecondaryInsuranceAdjudicationDate | | The adjudication date of the payment posted from the secondary insurance policy on the case related to this charge (e.g., YYYY-MM-DD). | Encounters > Find Payments |
| SecondaryInsurancePaymentRef | | The reference number of the payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments |

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| --- | --- | --- | --- |
| FIELD NAME | DESCRIPTION | | WHERE TO FIND IN TEBRA |
| SecondaryInsurancePaymentMethodDesc | | The payment method of the payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments |
| SecondaryInsurancePaymentCategoryDesc | | The category of the payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments |
| SecondaryInsuranceAllowed | | The allowed amount of the payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| SecondaryInsuranceContractAdjustment | | The amount of the contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| SecondaryInsuranceContractAdjustmentReason | | The reason of the contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| SecondaryInsuranceSecondaryAdjustment | | The amount of the secondary contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| SecondaryInsuranceSecondaryAdjustmentReas on | | The reason of the secondary contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| SecondaryInsurancePayment | | The payment posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| SecondaryInsuranceDeductible | | The deductible posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| SecondaryInsuranceCoinsurance | | The coinsurance posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| SecondaryInsuranceCopay | | The copay posted from the secondary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| TertiaryInsuranceCompanyName | | If tertiary payment is posted by user, then this field is associated with the tertiary insurance policy as identified by user when posting the insurance payment. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| TertiaryInsurancePlanName | | If tertiary payment is posted by user, then this field is associated with the tertiary insurance policy as identified by user when posting the insurance payment. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| TertiaryInsuranceAddressLine1 | | The first address line of the insurance plan associated with the tertiary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| TertiaryInsuranceAddressLine2 | | The second address line of the insurance plan associated with the tertiary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

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| FIELD NAME | DESCRIPTION | | WHERE TO FIND IN TEBRA |
| TertiaryInsuranceCity | | The city of the insurance plan associated with the tertiary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| TertiaryInsuranceState | | The state of the insurance plan associated with the tertiary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| TertiaryInsuranceCountry | | The country of the insurance plan associated with the tertiary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| TertiaryInsuranceZipCode | | The zip code of the insurance plan associated with the tertiary insurance policy on the case related to this charge. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| TertiaryInsuranceBatchID | | The unique identifier of the billing batch associated with the tertiary insurance policy on the case related to the charge. | N/A |
| TertiaryInsurancePaymentID | | The unique identifier of the payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments |
| TertiaryInsurancePaymentPostingDate | | The posting date of the payment posted from the tertiary insurance policy on the case related to this charge (e.g., YYYY-MM- DD). | Encounters > Find Payments |
| TertiaryInsuranceAdjudicationDate | | The adjudication date of the payment posted from the tertiary insurance policy on the case related to this charge (e.g., YYYY-MM-DD). | Encounters > Find Payments |
| TertiaryInsurancePaymentRef | | The reference number of the payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments |
| TertiaryInsurancePaymentMethodDesc | | The payment method of the payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments |
| TertiaryInsurancePaymentCategoryDesc | | The category of the payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments |
| TertiaryInsuranceAllowed | | The allowed amount of the payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| TertiaryInsuranceContractAdjustment | | The amount of the contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| TertiaryInsuranceContractAdjustmentReason | | The reason of the contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| TertiaryInsuranceSecondaryAdjustment | | The amount of the secondary contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |

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| FIELD NAME | DESCRIPTION | | WHERE TO FIND IN TEBRA |
| TertiaryInsuranceSecondaryAdjustmentReason | | The reason of the secondary contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| TertiaryInsurancePayment | | The payment posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| TertiaryInsuranceDeductible | | The deductible posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| TertiaryInsuranceCoinsurance | | The coinsurance posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| TertiaryInsuranceCopay | | The copay posted from the tertiary insurance policy on the case related to this charge. | Encounters > Find Payments  > Edit Payment |
| PatientBatchID | | The batch number associated with the patient payment related to this charge. | Encounters > Find Payments |
| PatientFirstBillDate | | The date the patient was first billed for this charge (e.g., YYYY-MM-DD). | Encounters > Track Claim Status > Edit Claim |
| PatientLastBillDate | | The date the patient was last billed for this charge (e.g., YYYY-MM-DD). | Encounters > Track Claim Status > Edit Claim |
| PatientPaymentRef | | The reference code related to the patient payment posted for this charge. | Encounters > Track Claim Status > Edit Claim |
| PatientPaymentID | | The unique identifier of the patient payment posted for this charge. | Encounters > Find Payments |
| PatientPaymentPostingDate | | The posting date of the patient payment posted for this charge (e.g., YYYY-MM-DD). | Encounters > Find Payments |
| PatientPaymentMethodDesc | | The payment method of the patient payment posted for this charge. | Encounters > Find Payments |
| PatientPaymentCategoryDesc | | The category of the patient payment posted for this charge. | Encounters > Find Payments |
| PatientPaymentAmount | | The amount of the patient payment posted for this charge. | Encounters > Find Payments  > Edit Payment |
| OtherAdjustment | | The type of other adjustment associated with the patient payment posted for this charge. | Encounters > Find Payments  > Edit Payment |

## Get Encounter Details

This operation returns an encounter’s details that match the criteria included within the

request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| PracticeID | The unique identifier associated with the practice related to this payment. | Yes |
| PracticeName | The name of the practice related to this payment. | Yes |
| Encounter ID | The unique identifier associated to the encounter. | Yes |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| EncounterID | The unique identifier of the encounter. | Encounters > Find Encounter > Edit Encounter |
| Created Date | The date the encounter was created (e.g., YYYY-MM-DD). | Encounters > Find Encounter > Edit Encounter |
| Last Modified Date | The date the encounter was last modified (e.g., YYYY-MM- DD). | N/A |
| Practice | The practice associated with the encounter. | N/A |
| Practice ID | The name of the practice associated with this encounter. | Settings > Company > Find Practice > Edit Practice |
| Practice Name | The name of the practice related to this transaction. | Settings > Practice Information |
| Appointment | The appointment data related to this encounter. | Appointments > Find Appointment |
| Appointment ID | The unique identifier associated with the appointment related to this encounter. | Appointments > Find Appointment > Appointment Details |
| Patient | The patient data related to this encounter. | Patients > Find Patient > Edit Patient |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| Patient ID | The unique identifier of the patient related to this encounter. | Patients > Find Patient > Edit Patient |
| Prefix | The prefix of the patient. | Patients > Find Patient > Edit Patient |
| First Name | The first name of the patient. | Patients > Find Patient > Edit Patient |
| Middle Name | The middle name of the patient. | Patients > Find Patient > Edit Patient |
| Last Name | The last name of the patient. | Patients > Find Patient > Edit Patient |
| Suffix | The suffix of the patient. | Patients > Find Patient > Edit Patient |
| Case | The case data related to this encounter. | Patients > Find Patient > Edit Patient > Cases |
| Case ID | The unique identifier of the case related to this encounter. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| Case Name | The name of the case related to this encounter. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| Case Payer Scenario | The payer scenario of the case related to this encounter. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| Service Start Date | The service start date of this charge (e.g., YYYY-MM-DD). | Encounters > Find Encounter > Edit Encounter |
| Service End Date | The service end date of this charge (e.g., YYYY-MM-DD). | Encounters > Find Encounter > Edit Encounter |
| Post Date | The post date of this encounter (e.g., YYYY-MM-DD). | Encounters > Find Encounter > Edit Encounter |
| Batch Number | The batch number associated with this encounter. | Encounters > Find Encounter > Edit Encounter |
| Scheduling Provider | The unique identifier of the scheduling provider. | Encounters > Find Encounter > Edit Encounter |
| ProviderID | The unique identifier of the scheduling provider related to this encounter. | Settings > Providers > Edit Provider |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | Settings > Providers > Edit Provider |
| Prefix | The prefix of the scheduling provider related to this encounter. | Settings > Providers > Edit Provider |
| FirstName | The first name of the scheduling provider related to this encounter. | Settings > Providers > Edit Provider |
| MiddleName | The middle name of the scheduling provider related to this encounter. | Settings > Providers > Edit Provider |
| LastName | The last name of the scheduling provider related to this encounter. | Settings > Providers > Edit Provider |
| Suffix | The suffix of the scheduling provider related to this encounter. | Settings > Providers > Edit Provider |
| Rendering Provider | The unique identifier of the rendering provider. | Encounters > Find Encounter > Edit Encounter |
| ProviderID | The unique identifier of the rendering provider related to this encounter. | Settings > Providers > Edit Provider |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | Settings > Providers > Edit Provider |
| Prefix | The prefix of the rendering provider related to this encounter. | Settings > Providers > Edit Provider |
| FirstName | The first name of the rendering provider related to this encounter. | Settings > Providers > Edit Provider |
| MiddleName | The middle name of the rendering provider related to this encounter. | Settings > Providers > Edit Provider |
| LastName | The last name of the rendering provider related to this encounter. | Settings > Providers > Edit Provider |
| Suffix | The suffix of the rendering provider related to this encounter. | Settings > Providers > Edit Provider |
| Supervising Provider | The unique identifier of the supervising provider. | Encounters > Find Encounter > Edit Encounter |
| ProviderID | The unique identifier of the supervising provider related to this encounter. | Settings > Providers > Edit Provider |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | Settings > Providers > Edit Provider |
| Prefix | The prefix of the supervising provider related to this encounter. | Settings > Providers > Edit Provider |
| FirstName | The first name of the supervising provider related to this encounter. | Settings > Providers > Edit Provider |
| MiddleName | The middle name of the supervising provider related to this encounter. | Settings > Providers > Edit Provider |
| LastName | The last name of the supervising provider related to this encounter. | Settings > Providers > Edit Provider |
| Suffix | The suffix of the supervising provider related to this encounter. | Settings > Providers > Edit Provider |
| Referring Provider | The unique identifier of the referring provider. | Encounters > Find Encounter > Edit Encounter |
| ProviderID | The unique identifier of the referring provider related to this encounter. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| Prefix | The prefix of the referring provider related to this encounter. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| FirstName | The first name of the referring provider related to this encounter. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| MiddleName | The middle name of the referring provider related to this encounter. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| LastName | The last name of the referring provider related to this encounter. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| Suffix | The suffix of the referring provider related to this encounter. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| Service Location | The service location data related to this encounter | Settings > Service Location > Find Service Location > Edit Service Location |
| Location ID | The unique identifier of the service location related to this encounter. | N/A |
| Location Name | The name of the service location related to this encounter. | Settings > Service Location > Find Service Location > Edit Service Location |
| Place of Service | The place of service data related to this encounter. | Settings > Service Location > Find Service Location > Edit Service Location |
| Place of Service Code | The place of service code related to this encounter. | Settings > Service Location > Find Service Location > Edit Service Location |
| Place of Service Name | The place of service name related to this encounter. | Settings > Service Location > Find Service Location > Edit Service Location |
| Payment | Used when a payment is collected with the encounter (copay for example). | Encounters > Find Encounter > Edit Encounter |
| Hospitalization | The hospitalization dates related to the encounter. | Encounters > Find Encounter > Edit Encounter |
| Start Date | The hospitalization start date related to this charge (e.g., YYYY-MM-DD). | Encounters > Find Encounter > Edit Encounter |
| End Date | The hospitalization end date related to this charge (e.g., YYYY-MM-DD). | Encounters > Find Encounter > Edit Encounter |
| Service Lines | The service lines related to the encounter. | Encounters > Find Encounter > Edit Encounter |
| ServiceLineID | The unique identifier of the service line. | N/A |
| Encounter Status | Available values:  Draft = Not yet completed  Review = Completed, ready for approval Approved = Reviewed and approved  Rejected = Needs clarification or corrections | Encounters > Find Encounter |

## Get Patient

This operation returns a specific patient that matches the criteria included within the request. This will return all patient cases, insurance policies, and authorizations for the patient. This operation is only available with the 2.0 interface and above.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| PatientID | The unique identifier of the patient. | Yes |
| PatientExternalID | The unique identifier of the patient in a third-party software system (used for integration purposes). | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ID | The unique identifier of the patient. | Patients > Find Patient > Edit Patient |
| CreatedDate | The date the patient was created (e.g., YYYY- MM-DD). | N/A |
| LastModifiedDate | The date the patient was last modified (e.g., YYYY-MM-DD). | N/A |
| PracticeName | The name of the practice related to this patient. | Settings > Practice Information |
| FullName | The full name of the patient. | Patients > Find Patient > Edit Patient |
| Prefix | The prefix of the patient. | Patients > Find Patient > Edit Patient |
| FirstName | The first name of the patient. | Patients > Find Patient > Edit Patient |
| MiddleName | The middle name of the patient. | Patients > Find Patient > Edit Patient |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| LastName | The last name of the patient. | Patients > Find Patient > Edit Patient |
| Suffix | The suffix of the patient. | Patients > Find Patient > Edit Patient |
| SocialSecurityNumber | The social security number of the patient. | Patients > Find Patient > Edit Patient |
| DateOfBirth | The date of birth of the patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient |
| Age | The age of the patient. | Patients > Find Patient > Edit Patient |
| Gender | Available values:   * Male * Female * Unknown | Patients > Find Patient > Edit Patient |
| MedicalRecordNumber | The medical record number for the patient. | Patients > Find Patient > Edit Patient |
| MaritalStatus | Available values:  A = Annulled D = Divorced  I = Interlocutory  L = Legally Separated  M = Married  P = Polygamous  S = Single/Never Married  T = Domestic Partner W = Widowed | Patients > Find Patient > Edit Patient |
| EmploymentStatus | The employment status of the patient. | Patients > Find Patient > Edit Patient |
| EmployerName | The name of the employer related to this patient. | Patients > Find Patient > Edit Patient |
| ReferralSource | The referral source of the patient. | Patients > Find Patient > Edit Patient |
| AddressLine1 | The first address line of the patient. | Patients > Find Patient > Edit Patient |
| AddressLine2 | The second address line of the patient. | Patients > Find Patient > Edit Patient |
| City | The city of the patient. | Patients > Find Patient > Edit Patient |
| State | The state of the patient. | Patients > Find Patient > Edit Patient |
| Country | The country of the patient (if different than the U.S.). | Patients > Find Patient > Edit Patient |
| ZipCode | The zip code of the patient. | Patients > Find Patient > Edit Patient |
| HomePhone | The home phone number of the patient. | Patients > Find Patient > Edit Patient |
| HomePhoneExt | The home phone number extension of the patient. | Patients > Find Patient > Edit Patient |
| WorkPhone | The work phone number of the patient. | Patients > Find Patient > Edit Patient |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| WorkPhoneExt | The work phone number extension of the patient. | Patients > Find Patient > Edit Patient |
| MobilePhone | The mobile phone number of the patient. | Patients > Find Patient > Edit Patient |
| MobilePhoneExt | The mobile phone number extension of the patient. | Patients > Find Patient > Edit Patient |
| EmailAddress | The email address of the patient. | Patients > Find Patient > Edit Patient |
| PracticeID | The unique identifier for the practice related to this patient. | Settings > Company > Find Practice > Edit Practice |
| DefaultRenderingProviderFullName | The name of the default rendering provider related to this patient. | Patients > Find Patient > Edit Patient |
| DefaultRenderingProviderID | The unique identifier of the default rendering provider related to this patient. | Settings > Providers > Edit Provider |
| PrimaryCarePhysicianFullName | The name of the primary care physician related to this patient. | Patients > Find Patient > Edit Patient |
| PrimaryCarePhysicianID | The unique identifier of the primary care physician related to this patient. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| ReferringProviderFullName | The name of the referring provider related to this patient. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| ReferringProviderID | The unique identifier of the referring provider related to this patient. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| DefaultServiceLocationID | The unique identifier of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationName | The name of the default service location related to this patient. | Patients > Find Patient > Edit Patient |
| DefaultServiceLocationNameAddressLine1 | The first address line of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationNameAddressLine2 | The second address line of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationNameCity | The city of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationNameState | The state of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationNameCountry | The country of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationNameZipCode | The zip code of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| DefaultServiceLocationBillingName | The billing name of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationPhone | The phone number of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationPhoneExt | The phone number extension of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationFaxPhone | The fax number of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationFaxPhoneExt | The fax number extension of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| GuarantorDifferentThanPatient | The type of guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorPrefix | The prefix of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorFirstName | The first name of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorMiddleName | The middle name of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorLastName | The last name of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorSuffix | The suffix of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote1User | The user associated with the first most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote1Date | The date associated with the first most recent note related to this patient (e.g., YYYY-MM- DD). | Patients > Find Patient > Edit Patient |
| MostRecentNote2User | The user associated with the second most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote2Date | The date associated with the second most recent note related to this patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient |
| MostRecentNote2Message | The message associated with the second most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote3User | The user associated with the third most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote3Date | The date associated with the third most recent note related to this patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient |
| MostRecentNote3Message | The message associated with the third most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote4User | The user associated with the fourth most recent note related to this patient. | Patients > Find Patient > Edit Patient |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| MostRecentNote4Date | The date associated with the fourth most recent note related to this patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient |
| MostRecentNote4Message | The message associated with the fourth most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| Cases | Collection of patient cases for this patient. | Patients > Find Patient > Edit Patient > Cases |
| PatientCaseID | The unique identifier of the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| Name | The name of the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| Description | The description of the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| ReferringProviderID | The unique identifier of the referring provider associated with the default case related to this patient. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| ReferringProviderFullName | The name of the referring provider associated with the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| SendPatientStatements | If patient statements should be sent for charges under the default case related to this patient, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| PayerScenario | The payer scenario of the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| ConditionRelatedToAutoAccident | If the default case for this patient is related to an auto-accident, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| ConditionRelatedToAutoAccidentState | The state of the auto accident for the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| ConditionRelatedToEmployment | If the default case for this patient is related to employment, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| ConditionRelatedToPregnancy | If the default case for this patient is related to pregnancy, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| ConditionRelatedToAbuse | If the default case for this patient is related to abuse, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| ConditionRelatedToOther | If the default case for this patient is related to other, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| ConditionRelatedToEPSDT | If the default case for this patient is related to EPSDT, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| ConditionRelatedToFamilyPlanning | If the default case for this patient is related to family planning, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| ConditionRelatedToEmergency | If the default case for this patient is related to an emergency, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| DatesInjuryStartDate | The start date of the injury of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesInjuryEndDate | The end date of the injury of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesSameorSimilarIllnessStartDate | The start date of the same or similar illness of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesSameorSimilarIllnessEndDate | The end date of the same or similar illness of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesUnabletoWorkStartDate | The start date the patient was unable to work for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesUnabletoWorkEndDate | The end date the patient was unable to work for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesRelatedDisabilityStartDate | The start date of a disability for the default case related to this patient (e.g., YYYY-MM- DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesRelatedDisabilityEndDate | The end date of a disability for the default case related to this patient (e.g., YYYY-MM- DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesRelatedHospitalizationStartDate | The start date of a hospitalization for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesRelatedHospitalizationEndDate | The end date of a hospitalization for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesLastMenstrualPeriodDate | The last menstrual period date of the default case related to this patient (e.g., YYYY-MM- DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesLastSeenDate | The date the patient was last seen for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesReferralDate | The referral date for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesAcuteManifestationDate | The acute manifestation date of the default case related to this patient (e.g., YYYY-MM- DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesLastX-RayDate | The last x-ray date of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DatesAccidentDate | The accident date of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| InsurancePolicies | Collection of insurance policies for this patient case. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PatientCaseID | The unique identifier of the patient case associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsurancePolicyID | The unique identifier number of the insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| CompanyID | The unique identifier of the insurance company associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| CompanyName | The name of the insurance company associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PlanID | The unique identifier of the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PlanName | The name of the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PlanAddressLine1 | The first address line of the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PlanAddressLine2 | The second address line of the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PlanCity | The city of the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PlanState | The state of the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PlanCountry | The country of the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PlanZipCode | The zip code of the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| AdjusterFullName | The adjuster name with the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| AdjusterPhoneNumber | The adjuster phone number with the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| AdjusterPhoneNumberExt | The adjuster phone number extension with the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| AdjusterFaxNumber | The adjuster fax number with the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| AdjusterFaxNumberExt | The adjuster fax number extension with the insurance plan associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| Number | The policy number associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| GroupNumber | The group number associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| Copay | The copay associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| Deductible | The deductible associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| EffectiveStartDate | The effective start date associated with this insurance policy (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| EffectiveEndDate | The effective end date associated with this insurance policy (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PatientRelationshipToInsured | Available values: C = Child  O = Other S = Self  U = Spouse | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredFullName | The full name of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredAddressLine1 | The first address line of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredAddressLine2 | The second address line of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredCity | The city of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredState | The state of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredCountry | The country of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredZipCode | The zip code of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredIDNumber | The unique identifier number of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredSocialSecurityNumber | The social security number of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| InsuredDateofBirth | The date of birth of the insured associated with this insurance policy (e.g., YYYY-MM- DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsuredGender | The gender of the insured associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| Notes | The notes on the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| Authorizations | Collection of insurance policy authorizations associated with this insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| AuthorizationNumber | The authorization number associated with this policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| AuthorizedNumberOfVisits | The number of visits authorized with the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| AuthorizedNumberOfVisitsUsed | The number of visits used for the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| ContactFullName | The insurance contact name associated with this policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| ContactPhone | The insurance contact phone number associated with this policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| ContactPhoneExt | The insurance contact phone number extension associated with this policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Notes | The authorization notes associated with this policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| StartDate | The start date associated with this policy (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| EndDate | The end date associated with this policy (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| AlertMessage | The alert message related to this patient. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenDisplayingPatientDetails | True if the alert message related to this patient should show when displaying patient details. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenSchedulingAppointments | True if the alert message related to this patient should show when scheduling appointments. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenEnteringEncounters | True if the alert message related to this patient should show when entering encounters. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| AlertShowWhenViewingClaimDetails | True if the alert message related to this patient should show when viewing claim details. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenPostingPayments | True if the alert message related to this patient should show when posting payments. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenPreparingPatientStatements | True if the alert message related to this patient should show when preparing patient statements. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| CollectionCategoryName | The name of the collection category related to this patient. | Patients > Find Patient > Edit Patient > Account |
| StatementNote | The last statement note posted to this patient's account. | Patients > Find Patient > Edit Patient > Account |
| LastDiagnosis | The last diagnosis entered for this patient. | Patients > Find Patient > Edit Patient > Account |
| LastAppointmentDate | The last appointment date scheduled for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Account |
| LastEncounterDate | The service date of the last encounter entered for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Account |
| LastStatementDate | The date of the last patient statement sent to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Account |
| LastPaymentDate | The posting date of the last payment received from this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Account |
| Charges | The total charges entered for this patient. | Patients > Find Patient > Edit Patient > Account |
| Adjustments | The total adjustments entered for this patient. | Patients > Find Patient > Edit Patient > Account |
| InsurancePayments | The total insurance payments posted for this patient. | Patients > Find Patient > Edit Patient > Account |
| PatientPayments | The total patient payments posted for this patient. | Patients > Find Patient > Edit Patient > Account |
| InsuranceBalance | The insurance balance pending on charges associated with this patient. | Patients > Find Patient > Edit Patient > Account |
| PatientBalance | The patient balance on charges assigned to this patient. | Patients > Find Patient > Edit Patient > Account |
| TotalBalance | The total balance related to this patient. | Patients > Find Patient > Edit Patient > Account |

## Get Patients

This operation returns a list of patients that match the criteria included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

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| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| PracticeName | The name of the practice related to these patients. | Yes |
| PracticeID | The unique identifier associated with the practice related to these patients. | Yes |
| FromCreatedDate | The starting date the patient record was created (e.g., YYYY-MM- DD). | No |
| ToCreatedDate | The ending date the patient record was created (e.g., YYYY-MM- DD). | No |
| FromLastModifiedDate | The starting date the patient was last modified (e.g., YYYY-MM-DD). | No |
| ToLastModifiedDate | The ending date the patient was last modified (e.g., YYYY-MM-DD). | No |
| FirstName | The first name of the patient. | No |
| MiddleName | The middle name of the patient. | No |
| LastName | The last name of the patient. | No |
| SSN | The SSN of the patient. | No |
| FullName | The full name of the patient. | No |
| FromDateOfBirth | The starting date for date of birth of the patient (e.g., YYYY-MM-DD). | No |
| ToDateOfBirth | The ending date for date of birth of the patient (e.g., YYYY-MM-DD). | No |
| DefaultRenderingProviderFullName | The name of the default rendering provider related to this patient. | No |
| PrimaryCarePhysicianFullName | The name of the primary care physician related to this patient. | No |
| ReferringProviderFullName | The name of the referring provider related to this patient. | No |
| DefaultServiceLocationName | The name of the default service location related to this patient. | No |
| DefaultCasePayerScenario | The payer scenario of the default case related to this patient. | No |
| DefaultCaseDatesAccidentDate | The accident date of the default case related to this patient (e.g., YYYY-MM-DD). | No |
| PrimaryInsurancePolicyCompanyName | The name of the insurance company associated with the primary insurance policy on the default case for this patient. | No |
| PrimaryInsurancePolicyPlanName | The name of the insurance plan associated with the primary insurance policy on the default case for this patient. | No |

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| FIELD NAME | DESCRIPTION | REQUIRED |
| SecondaryInsurancePolicyCompanyName | The name of the insurance company associated with the secondary insurance policy on the default case for this patient. | No |
| SecondaryInsurancePolicyPlanName | The name of the insurance plan associated with the secondary insurance policy on the default case for this patient. | No |
| FromLastEncounterDate | The starting service date of the last encounter for the patient (e.g., YYYY-MM-DD). | No |
| ToLastEncounterDate | The ending service date of the last encounter for the patient (e.g., YYYY-MM-DD). | No |

### The Response

The following information will be returned with the response for this operation.

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ID | The unique identifier of the patient. | Patients > Find Patient > Edit Patient |
| CreatedDate | The date the patient was created (e.g., YYYY-MM-DD). | N/A |
| LastModifiedDate | The date the patient was last modified (e.g., YYYY-MM-DD). | N/A |
| PracticeName | The name of the practice related to this patient. | Settings > Practice Information |
| FullName | The full name of the patient. | Patients > Find Patient > Edit Patient |
| Prefix | The prefix of the patient. | Patients > Find Patient > Edit Patient |
| FirstName | The first name of the patient. | Patients > Find Patient > Edit Patient |
| MiddleName | The middle name of the patient. | Patients > Find Patient > Edit Patient |
| LastName | The last name of the patient. | Patients > Find Patient > Edit Patient |
| Suffix | The suffix of the patient. | Patients > Find Patient > Edit Patient |
| SocialSecurityNumber | The social security number of the patient. | Patients > Find Patient > Edit Patient |
| DateOfBirth | The date of birth of the patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient |
| Age | The age of the patient. | Patients > Find Patient > Edit Patient |
| Gender | Available values:   * Male * Female * Unknown | Patients > Find Patient > Edit Patient |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| MedicalRecordNumber | The medical record number for the patient. | Patients > Find Patient > Edit Patient |
| MaritalStatus | Available values:  A = Annulled D = Divorced  I = Interlocutory  L = Legally Separated  M = Married  P = Polygamous  S = Single/Never Married  T = Domestic Partner W = Widowed | Patients > Find Patient > Edit Patient |
| EmploymentStatus | The employment status of the patient. | Patients > Find Patient > Edit Patient |
| EmployerName | The name of the employer related to this patient. | Patients > Find Patient > Edit Patient |
| ReferralSource | The referral source of the patient. | Patients > Find Patient > Edit Patient |
| AddressLine1 | The first address line of the patient. | Patients > Find Patient > Edit Patient |
| AddressLine2 | The second address line of the patient. | Patients > Find Patient > Edit Patient |
| City | The city of the patient. | Patients > Find Patient > Edit Patient |
| State | The state of the patient. | Patients > Find Patient > Edit Patient |
| Country | The country of the patient (if different than the U.S.). | Patients > Find Patient > Edit Patient |
| ZipCode | The zip code of the patient. | Patients > Find Patient > Edit Patient |
| HomePhone | The home phone number of the patient. | Patients > Find Patient > Edit Patient |
| HomePhoneExt | The home phone number extension of the patient. | Patients > Find Patient > Edit Patient |
| WorkPhone | The work phone number of the patient. | Patients > Find Patient > Edit Patient |
| WorkPhoneExt | The work phone number extension of the patient. | Patients > Find Patient > Edit Patient |
| MobilePhone | The mobile phone number of the patient. | Patients > Find Patient > Edit Patient |
| MobilePhoneExt | The mobile phone number extension of the patient. | Patients > Find Patient > Edit Patient |
| EmailAddress | The email address of the patient. | Patients > Find Patient > Edit Patient |
| PracticeID | The unique identifier for the practice related to this patient. | Settings > Company > Find Practice > Edit Practice |
| DefaultRenderingProviderFullName | The name of the default rendering provider related to this patient. | Patients > Find Patient > Edit Patient |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| DefaultRenderingProviderID | The unique identifier of the default rendering provider related to this patient. | Settings > Providers > Edit Provider |
| PrimaryCarePhysicianFullName | The name of the primary care physician related to this patient. | Patients > Find Patient > Edit Patient |
| PrimaryCarePhysicianID | The unique identifier of the primary care physician related to this patient. | Settings > Other List > Find Referring Physicians  > Edit Referring Physician |
| ReferringProviderFullName | The name of the referring provider related to this patient. | Patient |
| ReferringProviderID | The unique identifier of the referring provider related to this patient. | Settings > Other List > Find Referring Physicians  > Edit Referring Physician |
| DefaultServiceLocationID | The unique identifier of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Location |
| DefaultServiceLocationName | The name of the default service location related to this patient. | Patients > Find Patient > Edit Patient |
| DefaultServiceLocationNameAddressLine1 | The first address line of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| DefaultServiceLocationNameAddressLine2 | The second address line of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| DefaultServiceLocationNameCity | The city of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| DefaultServiceLocationNameState | The state of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| DefaultServiceLocationNameCountry | The country of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| DefaultServiceLocationNameZipCode | The zip code of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| DefaultServiceLocationBillingName | The billing name of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| DefaultServiceLocationPhone | The phone number of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| DefaultServiceLocationPhoneExt | The phone number extension of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| DefaultServiceLocationFaxPhone | The fax number of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| DefaultServiceLocationFaxPhoneExt | The fax number extension of the default service location related to this patient. | Settings > Service Location > Find Service Location > Edit Service Locations |
| GuarantorDifferentThanPatient | The type of guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorPrefix | The prefix of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorFirstName | The first name of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorMiddleName | The middle name of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorLastName | The last name of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| GuarantorSuffix | The suffix of the guarantor if different than the patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote1User | The user associated with the first most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote1Date | The date associated with the first most recent note related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient |
| MostRecentNote1Message | The message associated with the first most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote2User | The user associated with the second most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote2Date | The date associated with the second most recent note related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient |
| MostRecentNote2Message | The message associated with the second most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote3User | The user associated with the third most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote3Date | The date associated with the third most recent note related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| MostRecentNote3Message | The message associated with the third most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote4User | The user associated with the fourth most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| MostRecentNote4Date | The date associated with the fourth most recent note related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient |
| MostRecentNote4Message | The message associated with the fourth most recent note related to this patient. | Patients > Find Patient > Edit Patient |
| DefaultCaseID | The unique identifier of the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| DefaultCaseName | The name of the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases |
| DefaultCaseDescription | The description of the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| DefaultCaseReferringProviderID | The unique identifier of the referring provider associated with the default case related to this patient. | Settings > Other List > Find Referring Physicians  > Edit Referring Physician |
| DefaultCaseReferringProviderFullName | The name of the referring provider associated with the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| DefaultCaseSendPatientStatements | If patient statements should be sent for charges under the default case related to this patient, then true.  Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| DefaultCasePayerScenario | The payer scenario of the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| DefaultCaseConditionRelatedToAutoAccident | If the default case for this patient is related to an auto-accident, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseConditionRelatedToAutoAccidentState | The state of the auto accident for the default case related to this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseConditionRelatedToEmployment | If the default case for this patient is related to employment, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseConditionRelatedToPregnancy | If the default case for this patient is related to pregnancy, then true.  Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseConditionRelatedToAbuse | If the default case for this patient is related to abuse, then true.  Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseConditionRelatedToOther | If the default case for this patient is related to other, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| DefaultCaseConditionRelatedToEPSDT | If the default case for this patient is related to EPSDT, then true.  Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseConditionRelatedToFamilyPlanning | If the default case for this patient is related to family planning, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseConditionRelatedToEmergency | If the default case for this patient is related to an emergency, then true. Otherwise, false. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesInjuryStartDate | The start date of the injury of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesInjuryEndDate | The end date of the injury of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesSameorSimilarIllnessStartDate | The start date of the same or similar illness of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesSameorSimilarIllnessEndDate | The end date of the same or similar illness of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesUnabletoWorkStartDate | The start date the patient was unable to work for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesUnabletoWorkEndDate | The end date the patient was unable to work for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesRelatedDisabilityStartDate | The start date of a disability for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesRelatedDisabilityEndDate | The end date of a disability for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesRelatedHospitalizationStartDate | The start date of a hospitalization for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesRelatedHospitalizationEndDate | The end date of a hospitalization for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesLastMenstrualPeriodDate | The last menstrual period date of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesLastSeenDate | The date the patient was last seen for the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesReferralDate | The referral date for the default case related to this patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesAcuteManifestationDate | The acute manifestation date of the default case related to this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| DefaultCaseDatesLastX-RayDate | The last x-ray date of the default case related to this patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| DefaultCaseDatesAccidentDate | The accident date of the default case related to this patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Condition |
| PrimaryInsurancePolicyCompanyID | The unique identifier of the insurance company associated with the primary insurance policy on the default case for this patient. | Settings > Insurance > Insurance Companies > Edit Insurance Company |
| PrimaryInsurancePolicyCompanyName | The name of the insurance company associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyPlanID | The unique identifier of the insurance plan associated with the primary insurance policy on the default case for this patient. | Settings > Insurance > Find Insurance Plan > Edit Insurance Plan |
| PrimaryInsurancePolicyPlanName | The name of the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyPlanAddressLine1 | The first address line of the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyPlanAddressLine2 | The second address line of the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyPlanCity | The city of the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyPlanState | The state of the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyPlanCountry | The country of the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyPlanZipCode | The zip code of the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyAdjusterFullName | The adjuster name with the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PrimaryInsurancePolicyAdjusterPhoneNumber | The adjuster phone number with the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyAdjusterPhoneNumberExt | The adjuster phone number extension with the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyAdjusterFaxNumber | The adjuster fax number with the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyAdjusterFaxNumberExt | The adjuster fax number extension with the insurance plan associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyNumber | The policy number associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyGroupNumber | The group number associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyCopay | The copay associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyDeductible | The deductible associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyEffectiveStartDate | The effective start date associated with the primary insurance policy on the default case for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyEffectiveEndDate | The effective end date associated with the primary insurance policy on the default case for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyPatientRelationshipToInsured | Available values: C = Child  O = Other S = Self  U = Spouse | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredFullName | The full name of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredAddressLine1 | The first address line of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

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| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PrimaryInsurancePolicyInsuredAddressLine2 | The second address line of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredCity | The city of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredState | The state of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredCountry | The country of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredZipCode | The zip code of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredIDNumber | The ID number of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredSocialSecurityNumber | The social security number of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredDateofBirth | The date of birth of the insured associated with the primary insurance policy on the default case for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyInsuredGender | The gender of the insured associated with the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| PrimaryInsurancePolicyNotes | The notes on the primary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyCompanyID | The unique identifier of the insurance company associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyCompanyName | The name of the insurance company associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyPlanID | The unique identifier of the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyPlanName | The name of the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| SecondaryInsurancePolicyPlanAddressLine1 | The first address line of the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyPlanAddressLine2 | The second address line of the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyPlanCity | The city of the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyPlanState | The state of the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyPlanCountry | The country of the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyPlanZipCode | The zip code of the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyAdjusterFullName | The adjuster name with the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyAdjusterPhoneNumber | The adjuster phone number with the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyAdjusterPhoneNumberExt | The adjuster phone number extension with the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyAdjusterFaxNumber | The adjuster fax number with the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyAdjusterFaxNumberExt | The adjuster fax number extension with the insurance plan associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyNumber | The policy number associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyGroupNumber | The group number associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| SecondaryInsurancePolicyCopay | The copay associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyDeductible | The deductible associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyEffectiveStartDate | The effective start date associated with the secondary insurance policy on the default case for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyEffectiveEndDate | The effective end date associated with the secondary insurance policy on the default case for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyPatientRelationshipToInsured | Available values: C = Child  O = Other S = Self  U = Spouse | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredFullName | The full name of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredAddressLine1 | The first address line of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredAddressLine2 | The second address line of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredCity | The city of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredState | The state of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredCountry | The country of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredZipCode | The zip code of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredIDNumber | The unique identifier number of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredSocialSecurityNumber | The social security number of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| SecondaryInsurancePolicyInsuredDateofBirth | The date of birth of the insured associated with the secondary insurance policy on the default case for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyInsuredGender | The gender of the insured associated with the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| SecondaryInsurancePolicyNotes | The notes on the secondary insurance policy on the default case for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| Authorization1Number | The authorization number associated with the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization1InsurancePlanName | The insurance plan name associated with the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization1NumberOfVisits | The number of visits authorized with the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization1NumberOfVisitsUsed | The number of visits used for the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization1ContactFullName | The insurance contact name associated with the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization1ContactPhone | The insurance contact phone number associated with the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization1ContactPhoneExt | The insurance contact phone number extension associated with the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization1Notes | The authorization notes associated with the first authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization1StartDate | The start date associated with the first authorization entered for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization1EndDate | The end date associated with the first authorization entered for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization2Number | The authorization number associated with the second authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization2InsPlanName | The insurance plan name associated with the second authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization2NumberOfVisits | The number of visits authorized with the second authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| Authorization2NumberOfVisitsUsed | The number of visits used for the second authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization2ContactFullname | The insurance contact name associated with the second authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization2ContactPhone | The insurance contact phone number associated with the second authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization2ContactPhoneExt | The insurance contact phone number extension associated with the second authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization2Notes | The authorization notes associated with the second authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization2StartDate | The start date associated with the second authorization entered for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization2EndDate | The end date associated with the second authorization entered for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3Number | The authorization number associated with the third authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3InsPlanName | The insurance plan name associated with the third authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3NumberOfVisits | The number of visits authorized with the third authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3NumberOfVisitsUsed | The number of visits used for the third authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3ContactFullname | The insurance contact name associated with the third authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3ContactPhone | The insurance contact phone number associated with the third authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3ContactPhoneExt | The insurance contact phone number extension associated with the third authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3Notes | The authorization notes associated with the third authorization entered for this patient. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3StartDate | The start date associated with the third authorization entered for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization3EndDate | The end date associated with the third authorization entered for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| AlertMessage | The alert message related to this patient. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenDisplayingPatientDetails | True if the alert message related to this patient should show when displaying patient details. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenSchedulingAppointments | True if the alert message related to this patient should show when scheduling appointments. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenEnteringEncounters | True if the alert message related to this patient should show when entering encounters. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenViewingClaimDetails | True if the alert message related to this patient should show when viewing claim details. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenPostingPayments | True if the alert message related to this patient should show when posting payments. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| AlertShowWhenPreparingPatientStatements | True if the alert message related to this patient should show when preparing patient statements. False otherwise. | Patients > Find Patient > Edit Patient > Alerts |
| CollectionCategoryName | The name of the collection category related to this patient. | Patients > Find Patient > Edit Patient > Account |
| StatementNote | The last statement note posted to this patient's account. | Patients > Find Patient > Edit Patient > Account |
| LastDiagnosis | The last diagnosis entered for this patient. | Patients > Find Patient > Edit Patient > Account |
| LastAppointmentDate | The last appointment date scheduled for this patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient > Account |
| LastEncounterDate | The service date of the last encounter entered for this patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient > Account |
| LastStatementDate | The date of the last patient statement sent to this patient (e.g., YYYY-MM- DD). | Patients > Find Patient > Edit Patient > Account |
| LastPaymentDate | The posting date of the last payment received from this patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient > Account |
| Charges | The total charges entered for this patient. | Patients > Find Patient > Edit Patient > Account |
| Adjustments | The total adjustments entered for this patient. | Patients > Find Patient > Edit Patient > Account |
| InsurancePayments | The total insurance payments posted for this patient. | Patients > Find Patient > Edit Patient > Account |
| PatientPayments | The total patient payments posted for this patient. | Patients > Find Patient > Edit Patient > Account |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| InsuranceBalance | The insurance balance pending on charges associated with this patient. | Patients > Find Patient > Edit Patient > Account |
| PatientBalance | The patient balance on charges assigned to this patient. | Patients > Find Patient > Edit Patient > Account |
| TotalBalance | The total balance related to this patient. | Patients > Find Patient > Edit Patient > Account |

## Get Payments

This operation returns a list of payments that match the criteria included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| ID | The unique identifier of the payment. | No |
| PracticeID | The unique identifier of the practice related to the payment. | No |
| FromCreatedDate | The starting date the payment record was created (e.g., YYYY-MM-DD). | No |
| ToCreatedDate | The ending date the payment record was created (e.g., YYYY-MM-DD). | No |
| FromLastModifiedDate | The starting date the payment was last modified (e.g., YYYY-MM-DD). | No |
| ToLastModifiedDate | The ending date the payment was last modified (e.g., YYYY-MM-DD). | No |
| PracticeName | The name of the practice related to this payment. | No |
| BatchNumber | The batch number of the payment. | No |
| FromPostDate | The starting date for the payment record’s posting date (e.g., YYYY-MM-DD). | No |
| ToPostDate | The ending date for the payment record’s posting date (e.g., YYYY-MM-DD). | No |
| PayerType | Available values:   * Insurance * Other * Patient | No |
| PayerName | The payer name of the payment. | No |
| AppointmentID | The unique identifier of the appointment associated to the payment. | No |
| ReferenceNumber | The reference number of the payment. | No |
| Amount | The amount of the payment. | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PracticeID | The unique identifier associated with the practice related to this payment. | Settings > Company > Find Practice > Edit Practice |
| ID | The unique identifier of the payment. | Encounters > Find Payments |
| CreatedDate | The date the payment was created (e.g., YYYY-MM-DD). | N/A |
| LastModifiedDate | The date the payment was last modified (e.g., YYYY-MM- DD). | N/A |
| BatchNumber | The batch number of the payment. | Encounters > Find Payments |
| PostDate | The post date of the payment (e.g., YYYY-MM-DD). | Encounters > Find Payments |
| AdjudicationDate | The adjudication date of the payment (e.g., YYYY-MM-DD). | Encounters > Find Payments |
| PayerType | Available values:   * Insurance * Other * Patient | Encounters > Find Payments |
| PayerName | The payer name of the payment. | Encounters > Find Payments |
| AppointmentID | The unique identifier of the appointment associated to the payment. | Encounters > Find Payments > Edit Payment |
| ReferenceNumber | The reference number of the payment. | Encounters > Find Payments |
| PaymentMethod | Available values:   * Cash * ElectronicFundsTransfer * Check * Other * CreditCard * Unknown | Encounters > Find Payments |
| Category | The category of the payment. | Encounters > Find Payments |
| Amount | The payment amount. | Encounters > Find Payments |
| Applied | The payment applied amount. | Encounters > Find Payments |
| Adjustments | The payment adjustments amount. | Encounters > Find Payments > Edit Payment |
| Refunds | The payment refunds amount. | Encounters > Find Payments |
| Unapplied | The payment unapplied amount. | Encounters > Find Payments |

## Get Practices

This operation returns a list of practices that match the criteria included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| PracticeName | The name of the practice. | Yes |
| FromCreatedDate | The starting date the practice was created (e.g., YYYY-MM-DD). | No |
| ToCreatedDate | The ending date the practice was created (e.g., YYYY-MM-DD). | No |
| FromLastModifiedDate | The starting date the practice was last modified (e.g., YYYY-MM-DD). | No |
| ToLastModifiedDate | The ending date the practice was last modified (e.g., YYYY-MM-DD). | No |
| TaxID | The tax ID or EIN of the practice. | No |
| NPI | The NPI of the practice. | No |
| Active | True if the practice is active, false otherwise. | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ID | The unique identifier of the practice. | Settings > Company > Find Practice > Edit Practice |
| PracticeName | The name of the practice. | Settings > Practice Information |
| CreatedDate | The date the practice was created (e.g., YYYY-MM-DD). | N/A |
| LastModifiedDate | The date the practice was last modified (e.g., YYYY-MM- DD). | N/A |
| TaxID | The tax ID or EIN of the practice. | Settings > Practice Information |
| NPI | The NPI of the practice. | Settings > Practice Information |
| Active | True if the practice is active. Otherwise, false. | Settings > Practice Information |
| SubscriptionEdition | The subscription edition of the practice. | Settings > Practice Information |
| PracticeAddressLine1 | The first address line of the practice. | Settings > Practice Information |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PracticeAddressLine2 | The second address line of the practice. | Settings > Practice Information |
| PracticeCity | The city of the practice. | Settings > Practice Information |
| PracticeState | The state of the practice. | Settings > Practice Information |
| PracticeCountry | The country of the practice (if different than the U.S.). | Settings > Practice Information |
| PracticeZipCode | The zip code of the practice. | Settings > Practice Information |
| WebSite | The web site of the practice. | Settings > Practice Information |
| Phone | The phone number of the practice. | Settings > Practice Information |
| PhoneExt | The phone number extension of the practice. | Settings > Practice Information |
| Fax | The fax number of the provider. | Settings > Practice Information |
| FaxExt | The fax number extension of the provider. | Settings > Practice Information |
| kFaxNumber | The Tebra assigned fax number of the practice. | Settings > Practice Information |
| Email | The email address of the practice. | Settings > Practice Information |
| AdministratorAddressLine1 | The first address line of the practice administrator. | Settings > Practice Information |
| AdministratorAddressLine2 | The second address line of the practice administrator. | Settings > Practice Information |
| AdministratorCity | The city of the practice administrator. | Settings > Practice Information |
| AdministratorState | The state of the practice administrator. | Settings > Practice Information |
| AdministratorCountry | The country of the practice administrator (if different than the U.S.). | Settings > Practice Information |
| AdministratorZipCode | The zip code of the practice administrator. | Settings > Practice Information |
| AdministratorPhone | The phone number of the practice administrator. | Settings > Practice Information |
| AdministratorPhoneExt | The phone number extension of the practice administrator. | Settings > Practice Information |
| AdministratorFax | The fax number of the practice administrator. | Settings > Practice Information |
| AdministratorFaxExt | The fax number extension of the practice administrator. | Settings > Practice Information |
| AdministratorEmail | The email address of the practice administrator. | Settings > Practice Information |
| BillingContactAddressLine1 | The first address line of the billing contact. | Settings > Practice Information |
| BillingContactAddressLine2 | The second address line of the billing contact. | Settings > Practice Information |
| BillingContactCity | The city of the billing contact. | Settings > Practice Information |
| BillingContactState | The state of the billing contact. | Settings > Practice Information |
| BillingContactCountry | The country of the billing contact (if different than the U.S.). | Settings > Practice Information |
| BillingContactZipCode | The zip code of the billing contact. | Settings > Practice Information |
| BillingContactPhone | The phone number of the billing contact. | Settings > Practice Information |
| BillingContactPhoneExt | The phone number extension of the billing contact. | Settings > Practice Information |
| BillingContactFax | The fax number of the billing contact. | Settings > Practice Information |
| BillingContactFaxExt | The fax number extension of the billing contact. | Settings > Practice Information |
| BillingContactEmail | The email address of the billing contact. | Settings > Practice Information |
| Notes | The notes related to this provider. | Settings > Practice Information |

## Get Procedure Code

This operation returns a list of procedure codes that match the criteria included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| ID | The unique identifier of the procedure code to look up. | No |
| ProcedureCode | The procedure code. | No |
| Active | Used to filter out only active procedure codes. | No |
| CustomerSpecific | Used to filter out only customer created procedure codes. | No |
| FromCreatedDate | The starting date the procedure code was created (e.g., YYYY-MM-DD). | No |
| ToCreatedDate | The ending date the procedure code was created (e.g., YYYY-MM-DD). | No |
| FromLastModifiedDate | The starting date the procedure code was last modified (e.g., YYYY-MM-DD). | No |
| ToLastModifiedDate | The ending date the procedure code was last modified (e.g., YYYY-MM-DD). | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ID | The unique identifier of the procedure code. | N/A |
| CustomerSpecific | True if the code was created by the customer. Otherwise, false. | Settings > Codes > Find Procedures  > Edit Procedure |
| ProcedureCode | The procedure or speed code. | Settings > Codes > Find Procedures  > Edit Procedure |
| TypeOfServiceCode | The type of service of the procedure code. | Settings > Codes > Find Procedures  > Edit Procedure |
| Active | True if the procedure code is active. Otherwise, false. | Settings > Codes > Find Procedures  > Edit Procedure |
| OfficialName | The official name of the procedure code. | Settings > Codes > Find Procedures  > Edit Procedure |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| LocalName | The local name of the procedure code. | Settings > Codes > Find Procedures  > Edit Procedure |
| OfficialDescription | The official description code of the procedure code. | Settings > Codes > Find Procedures  > Edit Procedure |
| BillableCode | The billable procedure code of the procedure code. | Settings > Codes > Find Procedures  > Edit Procedure |
| DefaultUnits | The default units of the procedure code. | Settings > Codes > Find Procedures  > Edit Procedure |
| NDC | The NDC number of the procedure code | Settings > Codes > Find Procedures  > Edit Procedure |
| DrugName | The drug name of the procedure code | Settings > Codes > Find Procedures  > Edit Procedure |
| ProcedureCodeCategoryID | The procedure code category of the procedure code | N/A |
| CreatedDate | The date the provider was created (e.g., YYYY-MM- DD). | N/A |
| ModifiedDate | The date the provider was last modified (e.g., YYYY- MM-DD). | N/A |

## Get Providers

This operation returns a list of providers that match the criteria included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| PracticeName | The name of the practice related to the provider. | Yes |
| FromCreatedDate | The starting date the provider record was created (e.g., YYYY-MM-DD). | No |
| ToCreatedDate | The ending date the provider record was created (e.g., YYYY-MM-DD). | No |
| FromLastModifiedDate | The starting date the provider was last modified (e.g., YYYY-MM-DD). | No |
| ToLastModifiedDate | The ending date the provider was last modified (e.g., YYYY-MM-DD). | No |
| Type | Available values:   * Normal Provider * Referring Provider | No |
| FullName | The full name of the provider. | No |
| DepartmentName | The department name related to this provider. | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ID | The unique identifier of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| CreatedDate | The date the provider was created (e.g., YYYY-MM-DD). | N/A |
| LastModifiedDate | The date the provider was last modified (e.g., YYYY-MM-DD). | N/A |
| PracticeName | The name of the practice related to this provider. | Settings > Practice Information |
| Type | Available values:   * Normal Provider * Referring Provider | N/A |
| FullName | The full name of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| Prefix | The prefix of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| FirstName | The first name of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| MiddleName | The middle name of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| LastName | The last name of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| Suffix | The suffix of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| Degree | The degree of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| SocialSecurityNumber | The social security number of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| NationalProviderIdentifier | The national provider identifier (NPI) of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| SpecialtyName | The specialty name associated with the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| BillingType | The type of provider for Tebra billing purposes. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| Active | True if the provider is active. False otherwise. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| DepartmentName | The department name related to this provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| EncounterFormName | The name of the encounter form related to this provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| AddressLine1 | The first address line of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| AddressLine2 | The second address line of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| City | The city of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| State | The state of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| Country | The country of the provider (if different than the U.S.). | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |
| ZipCode | The zip code of the provider. | Settings > Providers > Edit Provider or Settings  > Other List > Find Referring Physicians > Edit Referring Physician |

## Get Service Locations

This operation returns a list of service locations that match the criteria included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| ID | The unique identifier of the service location. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| PracticeName | The name of the practice related to the service location. | Yes |
| PracticeID | The unique identifier of the practice related to the service location. | Yes |
| FromCreatedDate | The starting date the service location was created (e.g., YYYY-MM-DD). | No |
| ToCreatedDate | The ending date the service location was created (e.g., YYYY-MM-DD). | No |
| FromLastModifiedDate | The starting date the service location was last modified (e.g., YYYY-MM-DD). | No |
| ToLastModifiedDate | The ending date the service location was last modified (e.g., YYYY-MM-DD). | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ID | The unique identifier of the service location. | N/A |
| PracticeID | The unique identifier of the practice | Settings > Company > Find Practice > Edit Practice |
| PracticeName | The name of the practice related to the service location. | Settings > Practice Information |
| Name | The name of the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| AddressLine1 | The first address line of the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| AddressLine2 | The second address line of the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| City | The city of the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| State | The state of the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| Country | The country of the service location (if different than the U.S.). | Settings > Service Location > Find Service Location > Edit Service Location |
| ZipCode | The zip code of the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| CreatedDate | The date the provider was created (e.g., YYYY-MM-DD). | N/A |
| ModifiedDate | The date the provider was last modified (e.g., YYYY- MM-DD). | N/A |
| PlaceOfService | The place of service type id for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| BillingName | The billing name for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| Phone | The phone number for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| PhoneExt | The phone extension for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| FaxPhone | The fax number for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| FaxPhoneExt | The fax number extension for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| HCFABox32FacilityID | The facility ID for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| CLIANumber | The CLIA number for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| NPI | The NPI for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |
| FacilityIDType | The Facility ID Type for the service location. | Settings > Service Location > Find Service Location > Edit Service Location |

## Get Transactions

This operation returns a list of transactions that match the criteria included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| PracticeName | The name of the practice related to the provider. | Yes |
| FromLastModifiedDate | The starting date the transaction was last modified (e.g., YYYY-MM-DD). | No |
| LastModifiedDate | The ending date the transaction was last modified (e.g., YYYY-MM-DD). | No |
| FromTransactionDate | The starting date the transaction was entered by the user (e.g., YYYY-MM-DD). | No |
| ToTransactionDate | The ending date the transaction was entered by the user (e.g., YYYY-MM-DD). | No |
| FromPostingDate | The starting posting date of the transaction as specified by the user (e.g., YYYY- MM-DD). | No |
| ToPostingDate | The ending posting date of the transaction as specified by the user (e.g., YYYY- MM-DD). | No |
| FromServiceDate | The starting service date of the transaction, if applicable (e.g., YYYY-MM-DD). | No |
| ToServiceDate | The ending service date of the transaction, if applicable (e.g., YYYY-MM-DD). | No |
| ClaimID | The unique identifier of the claim. | No |
| Type | The type of transaction. | No |
| PayerType | The payer type related to this transaction, if applicable. | No |
| InsuranceOrder | The order of the insurance related to this transaction, if applicable. | No |
| ProcedureCode | The procedure code related to this transaction, if applicable. | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ID | The unique identifier of the claim transaction. | N/A |
| Last Modified Date | The date the transaction was last modified (e.g., YYYY- MM-DD). | Varies by transaction |
| PracticeName | The name of the practice related to this transaction. | Settings > Practice Information |
| TransactionDate | The date the transaction was entered by the user (e.g., YYYY-MM-DD). | Varies by transaction |
| PostingDate | The posting date of the transaction as specified by the user (e.g., YYYY-MM-DD). | Varies by transaction |
| ServiceDate | The service date of the transaction, if applicable (e.g., YYYY-MM-DD). | Varies by transaction |
| Type | The type of transaction. | Varies by transaction |
| PatientID | The unique identifier of the patient related to this transaction, if applicable. | Patients > Find Patient > Edit Patient |
| PatientFullName | The full name of the patient related to this transaction, if applicable. | Patients > Find Patient > Edit Patient |
| PayerType | The payer type related to this transaction, if applicable. | Varies by transaction |
| Insurance Order | The order of the insurance related to this transaction, if applicable. | Varies by transaction |
| InsuranceID | The unique identifier of the insurance related to this transaction, if applicable. | Varies by transaction |
| InsuranceCompanyName | The name of the insurance company related to this transaction, if applicable. | Varies by transaction |
| InsurancePlanName | The name of the insurance plan related to this transaction, if applicable. | Varies by transaction |
| ProcedureCode | The procedure code related to this transaction, if applicable. | Varies by transaction |
| Description | The description of this transaction. | Varies by transaction |
| Amount | The amount of this transaction, if applicable. | Varies by transaction |
| ClaimID | The unique identifier of the claim. | Encounter > Track Claim Status |
| PracticeID | The unique identifier of the practice related to this transaction. | Settings > Company > Find Practice > Edit Practice |

## Create Appointment

This operation creates a new appointment with the information included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| PracticeID | The unique identifier of the practice. | Yes |
| ServiceLocationID | The unique identifier of the service location. | Yes |
| AppointmentStatus | Available values:   * Unknown * Scheduled * ReminderSent * Confirmed * CheckedIn * Roomed * CheckedOut * NeedsReschedule * ReadyToBeSeen * NoShow * Cancelled * Rescheduled * Tentative | Yes |
| StartTime | The start time of the appointment in UTC time standard (e.g.,2020-01- 24T22:00:00.000Z). | Yes |
| EndTime | The end time of the appointment in UTC time standard (e.g., 2020-01- 24T22:30:00.000Z). | Yes |
| IsRecurring | Defines if the appointment is recurring. | Yes |
| PatientSummary | Structure described below. | Yes |
| AppointmentReasonID | The unique identifier of the appointment reason. | No |
| RecurrenceRule | Structure described below. | No |
| ProviderID | The unique identifier of the provider. | No |
| ResourceID | The unique identifier of the resource. | No |
| Notes | The appointment notes. | No |
| ResourceIDs | The list of resource unique identifiers. | No |
| AppointmentType | Available values: U = Unknown  P= Patient O = Other | Yes |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| WasCreatedOnline | Defines if the appointment is created online. | Yes |
| InsurancePolicyAuthorizationID | The unique identifier of the insurance policy authorization. | No |
| PatientCaseID | The unique identifier of the patient case. | No |
| AppointmentName | The name of the appointment. | No |
| IsGroupAppointment | Defines if the appointment is for a group. | No |
| MaxAttendees | Defines the maximum number of attendees. | No |
| AttendeesCount | The number of attendees in the appointment. | No |
| PatientSummaries | List of patient summary structure defined below: | No |
| ForRecare | Defines if the appointment is for recare. | No |
| PatientID | The unique identifier of the patient. | Yes |
| AppointmentMode | Available values:   * InOffice * Telehealth | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PracticeID | The unique identifier of the practice related to this appointment. | Settings > Company > Find Practice > Edit Practice |
| ServiceLocationID | The unique identifier of the service location related to this appointment. | N/A |
| AppointmentStatus | Available values:   * Unknown * Scheduled * ReminderSent * Confirmed * CheckedIn * Roomed * CheckedOut * NeedsReschedule * ReadyToBeSeen * NoShow * Cancelled * Rescheduled * Tentative | Appointments > Find Appointment > Appointment Details |
| StartTime | The start time of the appointment in UTC time standard (e.g.,2020-01- 24T22:00:00.000Z). | Appointments > Find Appointment > Appointment Details |
| EndTime | The end time of the appointment in UTC time standard (e.g., 2020-01-24T22:30:00.000Z). | Appointments > Find Appointment > Appointment Details |
| IsRecurring | Defines if the appointment is recurring. | Appointments > Find Appointment > Appointment Details > Recurrence |
| OccurrenceID | The unique identifier of the occurrence. | Appointments > Find Appointment > Appointment Details |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PatientSummary | Structure described below. | Patients > Find Patient > Edit Patient |
| AppointmentReasonID | The unique identifier of the appointment reason. | Appointments > Appointment Reasons  > Edit Appointment Reason |
| RecurrenceRule | Structure described below. | Appointments > Find Appointment > Appointment Details > Recurrence |
| ProviderID | The unique identifier of the provider. | Settings > Find Provider > Edit Provider |
| ResourceID | The unique identifier of the resource. | N/A |
| Notes | The appointment notes. | Appointments > Find Appointment > Appointment Details |
| ResourceIDs | The list of resource unique identifiers. | N/A |
| AppointmentType | Available values: U = Unknown  P= Patient O = Other | Appointments > Find Appointment > Appointment Details |
| WasCreatedOnline | Defines if the appointment is created online. | N/A |
| InsurancePolicyAuthorizationId | The unique identifier of the insurance policy authorization. | Appointments > Find Appointment > Appointment Details > Authorization... |
| PatientCaseID | The unique identifier of the patient case. | Appointments > Find Appointment > Appointment Details > Case... |
| AppointmentName | The name of the appointment. | Appointments > Find Appointment |
| IsGroupAppointment | Defines if the appointment is for a group. | N/A |
| MaxAttendees | Defines the maximum number of attendees. | N/A |
| AttendeesCount | The number of attendees in the appointment. | N/A |
| PatientSummaries | List of patient summary structure defined below: | Patients > Find Patient > Edit Patient |
| ForRecare | Defines if the appointment is for recare. | N/A |
| PatientID | The unique identifier of the patient. | Patients > Find Patient > Edit Patient |
| PracticeID | The unique identifier of the practice. | Settings > Company > Find Practice > Edit Practice |
| GenderID | The unique identifier of the gender. | Patients > Find Patient > Edit Patient |
| DateOfBirth | The date of birth of the patient (e.g., YYYY- MM-DD). | Patients > Find Patient > Edit Patient |
| FirstName | The first name of the patient. | Patients > Find Patient > Edit Patient |
| MiddleName | The middle name of the patient. | Patients > Find Patient > Edit Patient |
| LastName | The last name of the patient. | Patients > Find Patient > Edit Patient |
| Email | The email address of the patient. | Patients > Find Patient > Edit Patient |
| HomePhone | The home phone number of the patient (e.g., (706) 223-3445). | Patients > Find Patient > Edit Patient |
| WorkPhone | The work phone number of the patient (e.g., (706) 223-3445). | Patients > Find Patient > Edit Patient |
| MobilePhone | The mobile phone number of the patient (e.g., (706) 223-3445). | Patients > Find Patient > Edit Patient |
| PreferredPhoneType | The preferred phone type of the patient (e.g., Mobile Phone). | N/A |
| WorkEmail | The work email address of the patient. | Patients > Find Patient > Edit Patient |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| OtherEmail | The other email address of the patient. | Patients > Find Patient > Edit Patient |
| PreferredEmailType | The preferred email type of the patient (e.g., Work Email). | N/A |
| Guid | GUID of the Patient Summary | N/A |
| RecurrenceRuleID | The unique identifier of the recurrence rule. | Appointments > Find Appointment > Appointment Details > Recurrence |
| AppointmentID | The unique identifier of the appointment. | Appointments > Find Appointment |
| StartDate | The start date and time of the appointment recurrence rule in UTC time standard. | Appointments > Find Appointment > Appointment Details > Recurrence |
| EndDate | The start date and time of the appointment recurrence rule in UTC time standard. | Appointments > Find Appointment > Appointment Details > Recurrence |
| NumOccurrences | The number of appointment occurrences. | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayInterval | Day interval of the appointment recurrence rule (e.g., 8 - Each eight days). | Appointments > Find Appointment > Appointment Details > Recurrence |
| MonthInterval | Month interval of the appointment recurrence rule (e.g., 3 - Each three months). | Appointments > Find Appointment > Appointment Details > Recurrence |
| MonthOfYear | Month of the year of the appointment recurrence rule (e.g., 10 - Month of October). | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfMonth | Day of the month of the appointment recurrence rule (e.g., 25 -Day 25 of the month). | Appointments > Find Appointment > Appointment Details > Recurrence |
| TypeOfDay | Available values:   * Unknown * Weekday * Weekend | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfWeekMonthlyOrdinal | Available values:   * Unknown * First * Second * Third * Fourth * Last | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfWeekMonthlyOrdinalFlags | Number that represents the weeks of month (e.g., 21 = 10101B - First, Third and Last Week) | Appointments > Find Appointment > Appointment Details > Recurrence |
| TypeOfDayMonthlyOrdinal | Available values:   * Unknown * First * Second * Third * Fourth * Last | Appointments > Find Appointment > Appointment Details > Recurrence |
| TypeOfDayMonthlyOrdinalFlags | Number that represents the weeks of month:   * If TypeOfDay is Weekday (e.g., 17 = 10001B - First and Last days of weekdays) * If TypeOfDay is Weekend (e.g., 3 = 00011B * First and Second days of weekend) | Appointments > Find Appointment > Appointment Details > Recurrence |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| DayOfWeek | Available values:   * Sunday * Monday * Tuesday * Wednesday * Thursday * Friday * Saturday | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfWeekFlags | Number that represents the days of week (e.g., 35 = 0100011B - Monday, Tuesday and Saturday). | Appointments > Find Appointment > Appointment Details > Recurrence |
| NumberOfTimes | The number of times to apply the recurrence rule (e.g., 5). | Appointments > Find Appointment > Appointment Details > Recurrence |
| AppointmentMode | Available values:   * InOffice * Telehealth | Web Platform > Calendar > New Appointment > Appointment Mode |

## Create Document

This operation creates a new document with the information included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| DocumentDate | The uploaded date for this document in the web platform (e.g., YYYY-MM-DD). | Yes |
| DocumentNotes | The notes or comments related to this document. | No |
| FileContent | The base64Binary data for this document. | Yes |
| FileName | The name for this document. | Yes |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| Label | Available values:   * Appeals Package * A/R * Authorization * Claim Status * Copay Log * Diagnostic Ultrasound * Document Batch * Eligibility * Explanation of Benefits (EOB) * History and Physical * Insurance Correspondence * Letter of Medical Necessity * Lien Document * Medical Record Request * Medical Report * Narrative Report * Operative Report * Patient Authorization/Referral * Patient Correspondence * Patient Demographics * Patient Driver’s License * Patient Insurance Card * Payment Batch * Prescriptions * Superbill * Superbill Batch * Tests * Ultrasound * Other * Continuity of Care Received | Yes |
| PatientId | The unique identifier for the patient related to this document. | Yes |
| PracticeId | The unique identifier associated with the practice related to this document. | Yes |
| Status | Available values:   * New * In-Process * Ready for Entry * Processed * Error * New-Billing | Yes |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| CreatedDate | The created date for this document in the Desktop Application (PM) (e.g., YYYY-MM-DD). | Desktop Application (PM) > Documents > Find Documents |
| DocumentDate | The uploaded date for this document in the web platform (e.g., YYYY-MM-DD). | Web Platform > Platform Icon  > Documents |
| DocumentID | The unique identifier for the document. | Documents > Find Documents |
| Label | Available values:   * Appeals Package * A/R * Authorization * Claim Status * Copay Log * Diagnostic Ultrasound * Document Batch * Eligibility * Explanation of Benefits (EOB) * History and Physical * Insurance Correspondence * Letter of Medical Necessity * Lien Document * Medical Record Request * Medical Report * Narrative Report * Operative Report * Patient Authorization/Referral * Patient Correspondence * Patient Demographics * Patient Driver’s License * Patient Insurance Card * Payment Batch * Prescriptions * Superbill * Superbill Batch * Tests * Ultrasound * Other * Continuity of Care Received | Documents > Find Documents |
| Name | The name of this document. | Documents > Find Documents |
| Notes | The notes or comments related to this document. | Documents > Find Documents |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| Status | Available values:   * New * In-Process * Ready for Entry * Processed * Error * New-Billing | Documents > Find Documents |
| Type | Available values:   * Unknown * Scan * File * Report * DirectMessage * PatientUploaded | N/A |

## Create Encounter

This operation creates a new encounter with the information included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| Practice | To select a practice, caller would provide one of the sub- fields below. | Yes |
| PracticeID | The unique identifier associated with the practice related to this encounter. | Yes |
| PracticeExternalID | The unique identifier of the practice in a third-party software system (used for integration purposes). | Yes |
| PracticeName | The name of the practice related to this encounter. | Yes |
| Appointment | To select an appointment, caller would provide one of the sub- fields below. | No |
| AppointmentID | The unique identifier of the appointment. | No |
| ApointmentExternalID | The unique identifier of the appointment in a third-party software system (used for integration purposes). | No |
| Patient | To select a patient, caller would provide one or more of the sub- fields below. | Yes |
| PatientID | The unique identifier of the patient related to this encounter. | Yes |
| PatientExternalID | The unique identifier of the patient in a third-party software system (used for integration purposes). | Yes |
| Prefix | The prefix of the patient related to this encounter. | Yes |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| FirstName | The first name of the patient related to this encounter. | Yes |
| MiddleName | The middle name of the patient related to this encounter. | Yes |
| LastName | The last name of the patient related to this encounter. | Yes |
| Suffix | The suffix of the patient related to this encounter. | Yes |
| Case | To select a case, caller would provide one of the sub-fields below. | Yes |
| CaseID | The unique identifier of the case related to this encounter. | Yes |
| CaseExternalID | The unique identifier of the case in a third-party software system (used for integration purposes). | Yes |
| CaseName | The name of the case related to this encounter. | Yes |
| CasePayerScenario | The payer scenario of the case related to this encounter. | Yes |
| AuthorizationNumber | The authorization number associated with this encounter. | No |
| ServiceStartDate | The service start date of this encounter (e.g., YYYY-MM-DD). | Yes |
| ServiceEndDate | The service end date of this encounter (e.g., YYYY-MM-DD). | No |
| PostDate | The post date of this encounter (e.g., YYYY-MM-DD). | Yes |
| BatchNumber | The batch number associated with this encounter. | No |
| SchedulingProvider | To select a provider, caller would provide one or more of the sub- fields below. | No |
| ProviderID | The unique identifier of the scheduling provider related to this encounter. | No |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | No |
| Prefix | The prefix of the scheduling provider related to this encounter. | No |
| FirstName | The first name of the scheduling provider related to this encounter. | No |
| MiddleName | The middle name of the scheduling provider related to this encounter. | No |
| LastName | The last name of the scheduling provider related to this encounter. | No |
| Suffix | The suffix of the scheduling provider related to this encounter. | No |
| RenderingProvider | To select a provider, caller would provide one or more of the sub- fields below. | Yes |
| ProviderID | The unique identifier of the rendering provider related to this encounter. | No |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | No |
| Prefix | The prefix of the rendering provider related to this encounter. | No |
| FirstName | The first name of the rendering provider related to this encounter. | No |
| MiddleName | The middle name of the rendering provider related to this encounter. | No |
| LastName | The last name of the rendering provider related to this encounter. | No |
| Suffix | The suffix of the rendering provider related to this encounter. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| SupervisingProvider | To select a provider, caller would provide one or more of the sub- fields below. | No |
| ProviderID | The unique identifier of the supervising provider related to this encounter. | No |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | No |
| Prefix | The prefix of the supervising provider related to this encounter. | No |
| FirstName | The first name of the supervising provider related to this encounter. | No |
| MiddleName | The middle name of the supervising provider related to this encounter. | No |
| LastName | The last name of the supervising provider related to this encounter. | No |
| Suffix | The suffix of the supervising provider related to this encounter. | No |
| ReferringProvider | To select a provider, caller would provide one or more of the sub- fields below. | No |
| ProviderID | The unique identifier of the referring provider related to this encounter. | No |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | No |
| Prefix | The prefix of the referring provider related to this encounter. | No |
| FirstName | The first name of the referring provider related to this encounter. | No |
| MiddleName | The middle name of the referring provider related to this encounter. | No |
| LastName | The last name of the referring provider related to this encounter. | No |
| Suffix | The suffix of the referring provider related to this encounter. | No |
| ServiceLocation | To select a service location, caller would provide one of the sub- fields below. | Yes |
| LocationID | The unique identifier of the service location related to this encounter. | No |
| LocationName | The name of the service location related to this encounter. | Yes |
| PlaceOfService | To select the place of service, caller would provide one of the sub-fields below. | No |
| PlaceOfServiceCode | The place of service code related to this encounter. | No |
| PlaceOfServiceName | The place of service name related to this encounter. | No |
| Payment | Used when a payment is collected with the encounter (copay for example). | No |
| AmountPaid | The amount paid. | No |
| PaymentMethod | Available values:   * Cash * ElectronicFundsTransfer * Check * Other * CreditCard * Unknown | No |
| ReferenceNumber | The reference number for this payment. | No |
| Description | The description for this payment. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| Category | The text matching an existing category in Tebra. | No |
| Hospitalization | The hospitalization dates related to this encounter. | No |
| StartDate | The hospitalization start date related to this encounter (e.g., YYYY-MM-DD). | No |
| EndDate | The hospitalization end date related to this encounter (e.g., YYYY-MM-DD). | No |
| Miscellaneous | Additional information for the payer. | No |
| LocalUseBox10d | The local use box 10d custom insurance field related to this encounter. | No |
| LocalUseBox19 | The local use box 19 custom insurance field related to this encounter. | No |
| DoNotSendClaimElectronically | True if the claim should not be sent electronically. False otherwise. | No |
| DoNotSendElectronicallyToSecondary | True if the claim should not be sent electronically to the secondary insurance. False otherwise. | No |
| E-ClaimNoteType | The line note related to this encounter. | No |
| E-ClaimNote | The line note related to this encounter. | No |
| MedicalOfficeNotes | The notes entered into the medical office notes field. | No |
| BusinessOfficeNotes | The notes entered into the medical office notes field. | No |
| Service Lines | The service lines on the encounter.  *Note:* When there are multiple service lines, the service lines created on the encounter will preserve the order in which they are received. | Yes |
| ServiceLine | This section shall be repeated for each charge. | Yes |
| EncounterProcedureExternalID | The unique identifier of the service line in a third-party software system (used for integration purposes). | No |
| ServiceStartDate | The service start date of this charge (e.g., YYYY-MM-DD). | Yes |
| ServiceEndDate | The service end date of this charge (e.g., YYYY-MM-DD). | No |
| ProcedureCode | The procedure code related to this charge. | Yes |
| ProcedureModifier1 | The first modifier of the procedure related to this charge. | No |
| ProcedureModifier2 | The second modifier of the procedure related to this charge. | No |
| ProcedureModifier3 | The third modifier of the procedure related to this charge. | No |
| ProcedureModifier4 | The fourth modifier of the procedure related to this charge. | No |
| DiagnosisCode1 | The first diagnosis code related to this charge. | Yes |
| DiagnosisCode2 | The second diagnosis code related to this charge. | No |
| DiagnosisCode3 | The third diagnosis code related to this charge. | No |
| DiagnosisCode4 | The fourth diagnosis code related to this charge. | No |
| Units | The number of units of the procedure related to this charge. | Yes |
| UnitCharge | The unit charge of the procedure related to this charge. | No |
| Minutes | The minutes of the procedure related to this charge. | No |
| LineNote | The line note of the procedure related to this charge. | No |
| RefCode | The ref code of the procedure related to this charge. | No |
| TypeofService | The type of service code of the procedure related to this charge. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| EncounterStatus | Available values:  Draft = Not yet completed Approved = Reviewed and approved  Rejected = Needs clarification or corrections Unpayable = Approved and unpayable  Submitted = Approved and submitted | No |
| ExternalID | The unique identifier of the encounter in a third-party software system (used for integration purposes). | No |
| PrimaryClaimType | Available values:  CMS1500 = Primary claim is a professional claim UB04 = Primary claim is an institutional claim | No |
| SecondaryClaimType | Available values:  CMS1500 = Secondary claim is a professional claim UB04 = Secondary claim is an institutional claim | No |
| UB04 | Fields related to institutional claims. | No |
| PrincipalDiagnosisCode | The principal diagnosis code related to this charge. | No |
| PrincipalProcedureCode | The principal procedure code related to this charge. | No |
| PrincipalProcedureDate | The principal procedure service date related to the charge. | No |
| AdmittingDiagnosisCode | The admitting diagnosis code for the patient at the time of admission and may differ from the principal diagnosis code. | No |
| AdmissionDate | The date the patient was admitted as an inpatient to the facility. | No |
| AdmissionCode | The admission code related to the type and priority of the inpatient admission to the facility. | No |
| Remarks | Additional information necessary for claim adjudication. | No |
| PointOfOriginCode | The point of origin code related to the source or method of the  patient’s referral for admission. | No |
| DischargeStatusCode | The discharge status code related to where the patient is being discharged or transferred to at the end of their facility stay such as an acute/post-acute care facility. | No |
| BillType | The submit reason for the claim. | No |
| HealthCodes | The health codes related to the charge. | No |
| HealthCodeType | Available values:   * Condition * Occurrence * Other Diagnosis * Value | No |
| HealthCode | The code related to the health code type of Condition, Occurrence, or Value. | No |
| DiagnosisCode | The code related to the health code type of Other Diagnosis. | No |
| DateFrom | The start date related to the Occurrence health code type and code. | No |
| DateTo | The end date related to the Occurrence health code type and code. | No |
| Amount | The amount related to the Value health code type and code. | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| EncounterID | The unique identifier of the new encounter that was created. | Encounters > Find Encounter |
| EncounterExternalID | The unique identifier of the encounter in a third-party software system (used for integration purposes). | N/A |
| PracticeID | The unique identifier of the practice associated with this new encounter. | Settings > Company > Find Practice > Edit Practice |
| PracticeExternalID | The unique identifier of the practice in a third-party software system (used for integration purposes). | N/A |
| PracticeName | The name of the practice associated with this new encounter. | Settings > Practice Information |
| PatientID | The unique identifier of the patient related to this encounter. | Patients > Find Patient > Edit Patient |
| PatientExternalID | The unique identifier of the patient in a third-party software system (used for integration purposes). | N/A |
| PatientCaseID | The unique identifier of the patient case. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| PatientCaseExternalID | The unique identifier of the case in a third-party software system (used for integration purposes). | N/A |
| SchedulingProviderID | The unique identifier of the scheduling provider. | Settings > Providers > Edit Provider |
| SchedulingProviderExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | N/A |
| RenderingProviderID | The unique identifier of the rendering provider. | Settings > Providers > Edit Provider |
| RenderingProviderExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | N/A |
| SupervisingProviderID | The unique identifier of the supervising provider. | Settings > Providers > Edit Provider |
| SupervisingProviderExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | N/A |
| ReferringProviderID | The unique identifier of the referring provider. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| ReferringProviderExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | N/A |
| ServiceLocationID | The unique identifier of the service location. | N/A |
| ServiceLines | The items in this section may be repeated for each service line. | Encounters > Find Encounter  > Edit Encounter |
| ServiceLineID | The unique identifier of the service line. | N/A |
| EncounterProcedureExternalID | The unique identifier of the service line in a third-party software system (used for integration purposes). | N/A |

## Create Patient

This operation creates a new patient with the information included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| Practice | To select a specific practice, caller would provide one of the sub- fields below. | Yes |
| PracticeID | The unique identifier associated with the practice related to this patient. | Yes |
| PracticeName | The name of the practice related to this patient. | Yes |
| PracticeExternalID | The unique identifier of the practice in a third-party software system (used for integration purposes). | No |
| PatientExternalID | The unique identifier of the patient in a third-party software system (used for integration purposes). | No |
| Prefix | The prefix of the patient. | No |
| FirstName | The first name of the patient. | Yes |
| MiddleName | The middle name of the patient. | No |
| LastName | The last name of the patient. | Yes |
| Suffix | The suffix of the patient. | No |
| SocialSecurityNumber | The social security number of the patient. | No |
| DateofBirth | The date of birth of the patient (e.g., YYYY-MM-DD). | No |
| Gender | Available values:   * Male * Female * Unknown | No |
| MedicalRecordNumber | The medical record number for the patient. | No |
| MaritalStatus | Available values:  A = Annulled D = Divorced  I = Interlocutory  L = Legally Separated  M = Married  P = Polygamous  S = Single/Never Married  T = Domestic Partner W = Widowed | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| ReferralSource | The referral source of the patient. | No |
| AddressLine1 | The first address line of the patient. | No |
| AddressLine2 | The second address line of the patient. | No |
| City | The city of the patient. | No |
| State | The state of the patient. | No |
| Country | The country of the patient (if different than the U.S.). | No |
| ZipCode | The zip code of the patient. | No |
| HomePhone | The home phone number of the patient. | No |
| HomePhoneExt | The home phone number extension of the patient. | No |
| WorkPhone | The work phone number of the patient. | No |
| WorkPhoneExt | The work phone number extension of the patient. | No |
| MobilePhone | The mobile phone number of the patient. | No |
| MobilePhoneExt | The mobile phone number extension of the patient. | No |
| EmailAddress | The email address of the patient. | No |
| Note | An initial note on the patient record in the notes area. | No |
| CollectionCategoryName | The name of the collection category related to this patient. | No |
| Guarantor | Structure described below. |  |
| DifferentThanPatient | True if guarantor is different than the patient. | No |
| RelationshipToGuarantor | The patient relationship to the guarantor. | No |
| GuarantorPrefix | The prefix of the guarantor if different than the patient. | No |
| GuarantorFirstName | The first name of the guarantor if different than the patient. | No |
| GuarantorMiddleName | The middle name of the guarantor if different than the patient. | No |
| GuarantorLastName | The last name of the guarantor if different than the patient. | No |
| GuarantorSuffix | The suffix of the guarantor if different than the patient. | No |
| AddressLine1 | The first address line of the guarantor. | No |
| AddressLine2 | The second address line of the guarantor. | No |
| City | The city of the guarantor. | No |
| State | The state of the guarantor. | No |
| Country | The country of the guarantor (if different than the U.S.). | No |
| ZipCode | The zip code of the guarantor. | No |
| Employer | If employer ID matches an existing employer, then update the information. Otherwise, add a new employer. | No |
| EmploymentStatus | The employment status of the patient. | No |
| EmployerID | The unique identifier of the employer related to this patient. | No |
| EmployerName | The name of the employer related to this patient. | No |
| AddressLine1 | The first address line of the employer. | No |
| AddressLine2 | The second address line of the employer. | No |
| City | The city of the employer. | No |
| State | The state of the employer. | No |
| Country | The country of the employer (if different than the U.S.). | No |
| ZipCode | The zip code of the employer. | No |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| DefaultRenderingProvider | To select a specific provider, caller would provide one of the sub- fields below. | No |
| ProviderID | The unique identifier of the default rendering provider related to this patient. | No |
| ExternalID | The unique identifier of the provider in a third-party software system (used for  integration purposes). | No |
| FullName | The name of the default rendering provider related to this patient. | No |
| PrimaryCarePhysician | To select a specific provider, caller would provide one of the sub- fields below. | No |
| ProviderID | The unique identifier of the primary care physician related to this patient. | No |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | No |
| FullName | The name of the primary care physician related to this patient. | No |
| ReferringProvider | To select a specific provider, caller would provide one of the sub- fields below. | No |
| ProviderID | The unique identifier of the referring provider related to this patient. | No |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | No |
| FullName | The name of the referring provider related to this patient. | No |
| DefaultServiceLocation | To select an existing default service location, caller would provide either the ID or name. Otherwise, a new service location is created with the information in the sub-fields below. | No |
| LocationID | The unique identifier of the default service location related to this patient. | No |
| LocationName | The name of the default service location related to this patient. | No |
| AddressLine1 | The first address line of the default service location related to this patient. | No |
| AddressLine2 | The second address line of the default service location related to this patient. | No |
| City | The city of the default service location related to this patient. | No |
| State | The state of the default service location related to this patient. | No |
| Country | The country of the default service location related to this patient. | No |
| ZipCode | The zip code of the default service location related to this patient. | No |
| BillingName | The billing name of the default service location related to this patient. | No |
| Phone | The phone number of the default service location related to this patient. | No |
| PhoneExt | The phone number extension of the default service location related to this patient. | No |
| FaxPhone | The fax number of the default service location related to this patient. | No |
| FaxPhoneExt | The fax number extension of the default service location related to this patient. | No |
| NPI | The national provider identifier for the service location. | No |
| FacilityIDType | The Facility ID Type for the service location. | No |
| FacilityID | The unique identifier of the facility. | No |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CLIANumber | The CLIA number of the facility. | No |
| POS | The place of service (POS) code of the facility. | No |
| Cases | Multiple cases may be specified. | No |
| Case | To add a case to a new patient, the caller would provide one or more of the sub- fields below and/or one or more of the sub-fields in each of the insurance policy section. Otherwise, no case is created. | No |
| ExternalID | The unique identifier of the case in a third-party software system (used for integration purposes). | No |
| Name | The name of the case related to this patient. | No |
| Description | The description of the case related to this patient. | No |
| ReferringProviderID | The unique identifier of the referring provider associated with the case related to this patient. | No |
| ReferringProviderFullName | The name of the referring provider associated with the case related to this patient. | No |
| SendPatientStatements | If patient statements should be sent for charges under the case related to this patient, then true. Otherwise, false. | No |
| PayerScenario | The payer scenario of the case related to this patient. | No |
| Condition | The conditions under by the policy. | No |
| RelatedToAutoAccident | If the case for this patient is related to an auto-accident, then true. Otherwise, false. | No |
| RelatedToAutoAccidentState | The state of the auto accident for the case related to this patient. | No |
| RelatedToEmployment | If the case for this patient is related to employment, then true. Otherwise, false. | No |
| RelatedToPregnancy | If the case for this patient is related to pregnancy, then true. Otherwise, false. | No |
| RelatedToAbuse | If the case for this patient is related to abuse then true. Otherwise, false. | No |
| RelatedToOther | If the case for this patient is related to other, then true. Otherwise, false. | No |
| RelatedToEPSDT | If the case for this patient is related to EPSDT, then true. Otherwise, false. | No |
| RelatedToFamilyPlanning | If the case for this patient is related to family planning, then true. Otherwise, false. | No |
| RelatedToEmergency | If the case for this patient is related to an emergency, then true. Otherwise, false. | No |
| Dates | The dates related to the condition. | No |
| InjuryStartDate | The start date of the injury of the case related to this patient (e.g., YYYY-MM-DD). | No |
| InjuryEndDate | The end date of the injury of the case related to this patient (e.g., YYYY-MM-DD). | No |
| SameorSimilarIllnessStartDate | The start date of the same or similar illness of the case related to this patient | No |
| SameorSimilarIllnessEndDate | The end date of the same or similar illness of the case related to this patient (e.g., YYYY-MM-DD). | No |
| DatesUnabletoWorkStartDate | The start date the patient was unable to work for the case related to this patient (e.g., YYYY-MM-DD). | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| DatesUnabletoWorkEndDate | The end date the patient was unable to work for the case related to this patient (e.g., YYYY-MM-DD). | No |
| DatesRelatedDisabilityStartDate | The start date of a disability for the case related to this patient (e.g., YYYY-MM-DD). | No |
| DatesRelatedDisabilityEndDate | The end date of a disability for the case related to this patient (e.g., YYYY-MM-DD). | No |
| RelatedHospitalizationStartDate | The start date of a hospitalization for the case related to this patient (e.g., YYYY-MM-DD). | No |
| RelatedHospitalizationEndDate | The end date of a hospitalization for the case related to this patient (e.g., YYYY-MM-DD). | No |
| LastMenstrualPeriodDate | The last menstrual period date of the case related to this patient (e.g., YYYY-MM-DD). | No |
| LastSeenDate | The date the patient was last seen for the case related to this patient (e.g., YYYY-MM-DD). | No |
| ReferralDate | The referral date for the case related to this patient (e.g., YYYY-MM- DD). | No |
| AcuteManifestationDate | The acute manifestation date of the case related to this patient (e.g., YYYY-MM-DD). | No |
| LastX-RayDate | The last x-ray date of the case related to this patient (e.g., YYYY-MM- DD). | No |
| AccidentDate | The accident date of the case related to this patient (e.g., YYYY-MM- DD). | No |
| Insurance Policies | Multiple insurance policies may be added to a case. | No |
| Insurance Policy | To select an existing insurance company or insurance plan, caller would provide either the ID or the name. Otherwise, a new insurance company and/or insurance plan is created with the information in the sub-fields below. If none of the fields are provided, no primary insurance policy is created. | No |
| CompanyID | The unique identifier of the insurance company associated with the primary insurance policy on the case for this patient. | No |
| CompanyName | The name of the insurance company associated with the primary insurance policy on the case for this patient. | No |
| PlanID | The unique identifier of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| PlanName | The name of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| ExternalID | The unique identifier of the insurance policy in a third-party software system (used for integration purposes). | No |
| AddressLine1 | The first address line of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| AddressLine2 | The second address line of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| City | The city of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| State | The state of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| Country | The country of the insurance plan associated with the primary insurance policy on the case for this patient. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| ZipCode | The zip code of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| Adjuster | The adjuster of the policy. | No |
| Prefix | The prefix of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| FirstName | The first name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| MiddleName | The middle name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| LastName | The last name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| Suffix | The suffix of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| PhoneNumber | The adjuster phone number with the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| PhoneNumberExt | The adjuster phone number extension with the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| FaxNumber | The adjuster fax number with the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| FaxNumberExt | The adjuster fax number extension with the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| PolicyNumber | The policy number associated with the primary insurance policy on the case for this patient. | No |
| PolicyGroupNumber | The group number associated with the primary insurance policy on the case for this patient. | No |
| Copay | The copay associated with the primary insurance policy on the case for this patient. | No |
| Deductible | The deductible associated with the primary insurance policy on the case for this patient. | No |
| EffectiveStartDate | The effective start date associated with the primary insurance policy on the case for this patient (e.g., YYYY-MM-DD). | No |
| EffectiveEndDate | The effective end date associated with the primary insurance policy on the case for this patient (e.g., YYYY-MM-DD). | No |
| Insured | The policy holder. | No |
| PatientRelationshipToInsured | The patient relationship to the insured associated with the primary insurance policy on the case for this patient. | No |
| Prefix | The prefix of the insured associated with the primary insurance policy on the case for this patient. | No |
| FirstName | The first name of the insured associated with the primary insurance policy on the case for this patient. | No |
| MiddleName | The middle name of the insured associated with the primary insurance policy on the case for this patient. | No |
| LastName | The last name of the insured associated with the primary insurance policy on the case for this patient. | No |
| Suffix | The suffix of the insured associated with the primary insurance policy on the case for this patient. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| AddressLine1 | The first address line of the insured associated with the primary insurance policy on the case for this patient. | No |
| AddressLine2 | The second address line of the insured associated with the primary insurance policy on the case for this patient. | No |
| City | The city of the insured associated with the primary insurance policy on the case for this patient. | No |
| State | The state of the insured associated with the primary insurance policy on the case for this patient. | No |
| Country | The country of the insured associated with the primary insurance policy on the case for this patient. | No |
| ZipCode | The zip code of the insured associated with the primary insurance policy on the case for this patient. | No |
| IDNumber | The ID number of the insured associated with the primary insurance policy on the case for this patient. | No |
| SocialSecurityNumber | The social security number of the insured associated with the primary insurance policy on the case for this patient. | No |
| DateofBirth | The date of birth of the insured associated with the primary insurance policy on the case for this patient (e.g., YYYY-MM-DD). | No |
| Gender | The gender of the insured associated with the primary insurance policy on the case for this patient. | No |
| PolicyThroughEmployer | True if the insurance policy is through the patient’s employer. | No |
| Employer | The name of the employer related to the insurance policy. | No |
| Active | True is insurance policy is active, otherwise false. | No |
| Precedence | An integer value to set the precedence (e.g. primary=1, secondary=2, etc.). | No |
| PolicyNotes | The notes on the primary insurance policy on the case for this patient. | No |
| Authorizations | Multiple authorizations may be specified. | No |
| Authorization | The authorization number associated with the first authorization entered for this patient. | No |
| InsurancePlanID | The insurance plan ID associated with the first authorization entered for this patient. | No |
| InsurancePlanName | The insurance plan name associated with the first authorization entered for this patient. | No |
| Number | The authorization number associated with the first authorization entered for this patient.  *Note:* If Number is populated, NumberOfVisits must also be populated. | No |
| NumberOfVisits | The number of visits authorized with the first authorization entered for this patient.  *Note:* If NumberOfVisits is populated, Number must also be populated. | No |
| NumberOfVisitsUsed | The number of visits used for the first authorization entered for this patient. | No |
| ContactFullName | The insurance contact name associated with the first authorization entered for this patient. | No |
| ContactPhone | The insurance contact phone number associated with the first authorization entered for this patient. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| ContactPhoneExt | The insurance contact phone number extension associated with the first authorization entered for this patient. | No |
| Notes | The authorization notes associated with the first authorization entered for this patient. | No |
| StartDate | The start date associated with the first authorization entered for this patient (e.g., YYYY-MM-DD). | No |
| EndDate | The end date associated with the first authorization entered for this patient (e.g., YYYY-MM-DD). | No |
| Alert | Structure described below. | No |
| Message | The alert message related to this patient. | No |
| ShowWhenDisplayingPatientDetails | True if the alert message related to this patient should show when displaying patient details. False otherwise. | No |
| ShowWhenSchedulingAppointments | True if the alert message related to this patient should show when scheduling appointments. False otherwise. | No |
| ShowWhenEnteringEncounters | True if the alert message related to this patient should show when entering encounters. False otherwise. | No |
| ShowWhenViewingClaimDetails | True if the alert message related to this patient should show when viewing claim details. False otherwise. | No |
| ShowWhenPostingPayments | True if the alert message related to this patient should show when posting payments. False otherwise. | No |
| ShowWhenPreparingPatientStatements | True if the alert message related to this patient should show when preparing patient statements. False otherwise. | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PatientID | The unique identifier of the new patient that was created. | Patients > Find Patient > Edit Patient |
| PracticeID | The unique identifier of the practice associated with this new patient. | Settings > Company > Find Practice > Edit Practice |
| PracticeExternalID | The unique identifier of the practice in a third- party software system (used for integration purposes). | N/A |
| PracticeName | The name of the practice associated with this new patient. | Settings > Practice Information |
| EmployerID | The unique identifier of the employer. | N/A |
| DefaultServiceLocationID | The unique identifier of the default service location. | N/A |
| Cases | Section includes information about cases created. | Patients > Find Patient > Edit Patient > Cases |
| Case | Section may repeat if multiple cases were created. | Patients > Find Patient > Edit Patient > Cases |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| CaseID | The unique identifier of the case is returned. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| CaseExternalID | The unique identifier of the case in a third-party software system (used for integration purposes). | N/A |
| Insurance Policies | Section includes information about insurance policies created. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| InsurancePolicyCompanyID | The unique identifier of the insurance company related to the primary insurance policy. | Settings > Insurance > Insurance Companies > Edit Insurance Company |
| InsurancePolicyPlanID | The unique identifier of the insurance plan related to the primary insurance policy. | Settings > Insurance > Find Insurance Plan > Edit Insurance Plan |
| InsurancePolicyID | The unique identifier of the primary insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsurancePolicyExternalID | The unique identifier of the insurance policy in a third-party software system (used for integration purposes). | N/A |
| Authorizations | Section includes information about authorizations created. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization | Section may repeat if multiple authorizations were created. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| AuthorizationID | The unique identifier of the authorizations created. | N/A |
| InsurancePolicyID | The unique identifier of the insurance policy related to the authorization. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

## Create Payments

This operation creates a new payment with the information included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| Practice | To select a practice, caller would provide one of the sub- fields below. | No |
| PracticeID | The unique identifier associated with the practice related to this payment. | No |
| PracticeName | The name of the practice related to this payment. | No |
| Appointment | To select an appointment, caller would provide one of the sub-fields below. | No |
| AppointmentID | The unique identifier of the appointment. | No |
| Patient | To select a patient, caller would provide one or more of the sub-fields below. | Yes |
| PatientID | The unique identifier of the patient related to this payment. | No |
| Prefix | The prefix of the patient related to this payment. | No |
| FirstName | The first name of the patient related to this payment. | No |
| MiddleName | The middle name of the patient related to this payment. | No |
| LastName | The last name of the patient related to this payment. | No |
| Suffix | The suffix of the patient related to this payment. | No |
| Insurance | To select a case, caller would provide one of the sub-fields below. | Yes |
| CompanyPlanID | The unique identifier of the company plan related to this payment. | No |
| CompanyPlanName | The name of the company plan. | No |
| Payment | Used when a payment is collected with the encounter (copay for example). | No |
| AmountPaid | The amount paid. | Yes |
| PaymentMethod | Available values:   * Cash * ElectronicFundsTransfer * Check * Other * CreditCard * Unknown | Yes |
| ReferenceNumber | The reference numbers. | Yes |
| BatchNumber | The batch number associated with this payment. | No |
| PostDate | The post date of the payment (e.g., YYYY-MM-DD). | No |
| PayerType | Available values:   * Insurance * Other * Patient | Yes |
| Other | The payer name if the payer type is Other. | No |
| AdjudicationDate | The adjudication date of the payment (e.g., YYYY-MM-DD). | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PaymentID | The unique identifier of the new payment that was created. | Encounters > Find Payments |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PracticeID | The unique identifier of the practice associated with this new payment. | Settings > Company > Find Practice > Edit Practice |
| PracticeName | The name of the practice associated with this new payment. | Settings > Practice Information |

## Update Appointment

This operation updates an existing appointment with the information included within the request. This operation is only available with the 2.0 interface and above.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| AppointmentID | The unique identifier of the appointment. | Yes |
| AppointmentStatus | Available values:   * Unknown * Scheduled * ReminderSent * Confirmed * CheckedIn * Roomed * CheckedOut * NeedsReschedule * ReadyToBeSeen * NoShow * Cancelled * Rescheduled * Tentative | Yes |
| ServiceLocationID | The unique identifier of the service location. | Yes |
| StartTime | The start time of the appointment in UTC time standard (e.g.,2020-01- 24T22:00:00.000Z). | Yes |
| EndTime | The end time of the appointment in UTC time standard (e.g., 2020-01- 24T22:30:00.000Z). | Yes |
| AppointmentReasonID | The unique identifier of the appointment reason. | Yes |
| ProviderID | The unique identifier of the provider. | No |

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| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| ResourceID | The unique identifier of the resource. | Yes |
| PatientID | The unique identifier of the patient. | Yes |
| ResourceIDs | The list of resource unique identifiers. | No |
| Notes | The appointment notes. | No |
| AppointmentName | The name of the appointment. | Yes |
| MaxAttendees | Defines the maximum number of attendees. | Yes |
| IsGroupAppointment | Defines if the appointment is for a group. | No |
| InsurancePolicyAuthorizationID | The unique identifier of the insurance policy authorization. | No |
| PatientCaseID | The unique identifier of the patient case.  *Note:* This field is required if the existing PatientCaseID is to be maintained or updated to a different PatientCaseID. | No |
| AppointmentMode | Available values:   * InOffice * Telehealth | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PracticeID | The unique identifier of the practice related to this appointment. | Settings > Company > Find Practice > Edit Practice |
| ServiceLocationID | The unique identifier of the service location related to this appointment. | N/A |
| AppointmentStatus | Available values:   * Unknown * Scheduled * ReminderSent * Confirmed * CheckedIn * Roomed * CheckedOut * NeedsReschedule * ReadyToBeSeen * NoShow * Cancelled * Rescheduled * Tentative | Appointments > Find Appointment |
| StartTime | The start time of the appointment in UTC time standard (e.g.,2020-01-24T22:00:00.000Z). | Appointments > Find Appointment |
| EndTime | The end time of the appointment in UTC time standard (e.g., 2020-01-24T22:30:00.000Z). | Appointments > Find Appointment |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| IsRecurring | Defines if the appointment is recurring. | Appointments > Find Appointment > Appointment Details > Recurrence |
| OccurrenceID | The unique identifier of the occurrence. | Appointments > Find Appointment > Appointment Details |
| PatientSummary | Structure described below. | Patients > Find Patient > Edit Patient |
| AppointmentReasonID | The unique identifier of the appointment reason. | Appointments > Appointment Reasons > Edit Appointment Reason |
| RecurrenceRule | Structure described below. | Appointment > Recurrence |
| ProviderID | The unique identifier of the provider. | Settings > Find Provider > Edit Provider |
| ResourceID | The unique identifier of the resource. | N/A |
| Notes | The appointment notes. | Appointments > Find Appointment > Appointment Details |
| ResourceIDs | The list of resource unique identifiers. | N/A |
| AppointmentType | Available values: U = Unknown  P= Patient O = Other | Appointments > Find Appointment > Appointment Details |
| WasCreatedOnline | Defines if the appointment is created online. | N/A |
| InsurancePolicyAuthorizationID | The unique identifier of the insurance policy authorization. | Appointments > Find Appointment > Appointment Details > Authorization... |
| PatientCaseID | The unique identifier of the patient case. | Appointments > Find Appointment > Appointment Details > Case... |
| AppointmentName | The name of the appointment. | Appointments > Find Appointment > Appointment Details |
| IsGroupAppointment | Defines if the appointment is for a group. | N/A |
| MaxAttendees | Defines the maximum number of attendees. | N/A |
| AttendeesCount | The number of attendees in the appointment. | N/A |
| PatientSummaries | List of patient summary structure defined below: | Patients > Find Patient > Edit Patient |
| ForRecare | Defines if the appointment is for recare. | N/A |
| PatientID | The unique identifier of the patient. | Patients > Find Patient > Edit Patient |
| PracticeID | The unique identifier of the practice. | Settings > Company > Find Practice > Edit Practice |
| GenderID | The unique identifier of the gender. | Patients > Find Patient > Edit Patient |
| DateOfBirth | The date of birth of the patient (e.g., YYYY-MM-DD). | Patients > Find Patient > Edit Patient |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| FirstName | The first name of the patient. | Patients > Find Patient > Edit Patient |
| MiddleName | The middle name of the patient. | Patients > Find Patient > Edit Patient |
| LastName | The last name of the patient. | Patients > Find Patient > Edit Patient |
| Email | The email address of the patient. | Patients > Find Patient > Edit Patient |
| HomePhone | The home phone number of the patient (e.g., (706) 223-3445). | Patients > Find Patient > Edit Patient |
| WorkPhone | The work phone number of the patient (e.g., (706) 223-3445). | Patients > Find Patient > Edit Patient |
| MobilePhone | The mobile phone number of the patient (e.g., (706) 223-3445). | Patients > Find Patient > Edit Patient |
| PreferredPhoneType | The preferred phone type of the patient (e.g., Mobile Phone). | N/A |
| WorkEmail | The work email address of the patient. | Patients > Find Patient > Edit Patient |
| OtherEmail | The other email address of the patient. | Patients > Find Patient > Edit Patient |
| PreferredEmailType | The preferred email type of the patient (e.g., Work Email). | N/A |
| Guid | GUID of the Patient Summary | N/A |
| RecurrenceRuleID | The unique identifier of the recurrence rule. | Appointments > Find Appointment > Appointment Details > Recurrence |
| AppointmentID | The unique identifier of the appointment. | Appointments > Find Appointment |
| StartDate | The start date and time of the appointment recurrence rule in UTC time standard. | Appointments > Find Appointment > Appointment Details > Recurrence |
| EndDate | The start date and time of the appointment recurrence rule in UTC time standard. | Appointments > Find Appointment > Appointment Details > Recurrence |
| NumOccurrences | The number of appointment occurrences. | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayInterval | Day interval of the appointment recurrence rule (e.g., 8 - Each eight days). | Appointments > Find Appointment > Appointment Details > Recurrence |
| MonthInterval | Month interval of the appointment recurrence rule (e.g., 3 - Each three months). | Appointments > Find Appointment > Appointment Details > Recurrence |
| MonthOfYear | Month of the year of the appointment recurrence rule (e.g., 10 - Month of October). | Appointments > Find Appointment > Appointment Details > Recurrence |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| DayOfMonth | Day of the month of the appointment recurrence rule (e.g., 25 -Day 25 of the month). | Appointments > Find Appointment > Appointment Details > Recurrence |
| TypeOfDay | Available values:   * Unknown * Weekday * Weekend | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfWeekMonthlyOrdinal | Available values:   * Unknown * First * Second * Third * Fourth * Last | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfWeekMonthlyOrdinalFlags | Number that represents the weeks of month (e.g., 21  = 10101B - First, Third and Last Week) | Appointments > Find Appointment > Appointment Details > Recurrence |
| TypeOfDayMonthlyOrdinal | Available values:   * Unknown * First * Second * Third * Fourth * Last | Appointments > Find Appointment > Appointment Details > Recurrence |
| TypeOfDayMonthlyOrdinalFlags | Number that represents the weeks of month:   * If TypeOfDay is Weekday (e.g., 17 = 10001B - First and Last days of weekdays) * If TypeOfDay is Weekend (e.g., 3 = 00011B - First and Second days of weekend) | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfWeek | List of day of the week. Available values:   * Sunday * Monday * Tuesday * Wednesday * Thursday * Friday * Saturday | Appointments > Find Appointment > Appointment Details > Recurrence |
| DayOfWeekFlags | Number that represents the days of week (e.g., 35 = 0100011B - Monday, Tuesday and Saturday). | Appointments > Find Appointment > Appointment Details > Recurrence |
| NumberOfTimes | The number of times of to apply the recurrence rule (e.g., 5). | Appointments > Find Appointment > Appointment Details > Recurrence |
| AppointmentMode | Available values:   * InOffice * Telehealth | Web Platform > Calendar > New Appointment > Appointment Mode |

## Update Encounter Status

This operation updates an encounter status with the information included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| Practice | To select a practice, caller would provide one of the sub- fields below. | No |
| PracticeID | The unique identifier associated with the practice related to this payment. | No |
| PracticeName | The name of the practice related to this payment. | No |
| Encounter ID | The unique identifier associated to the encounter.  *Note:* Only encounters with a status of Draft or Review can be updated via this API call. | Yes |
| Encounter Status | Available values:  Draft = Not yet completed  Review = Completed, ready for approval  Approved = Reviewed and approved Rejected = Needs clarification or corrections | Yes |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| EncounterID | The unique identifier of the encounter. | Encounters > Find Encounter |
| EncounterExternalID | The unique identifier of the encounter in a third-party software system (used for integration purposes). | N/A |
| PracticeID | The unique identifier of the practice associated with this encounter. | Settings > Company > Find Practice > Edit Practice |
| PracticeExternalID | The unique identifier of the practice in a third-party software system (used for integration purposes). | N/A |
| PracticeName | The name of the practice associated with this encounter. | Settings > Practice Information |
| PatientID | The unique identifier of the patient related to this encounter. | Patients > Find Patient > Edit Patient |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PatientExternalID | The unique identifier of the patient in a third-party software system (used for integration purposes). | N/A |
| PatientCaseID | The unique identifier of the patient case. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| PatientCaseExternalID | The unique identifier of the case in a third-party software system (used for integration purposes). | N/A |
| SchedulingProviderID | The unique identifier of the scheduling provider. | Settings > Providers > Edit Provider |
| SchedulingProviderExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | N/A |
| RenderingProviderID | The unique identifier of the rendering provider. | Settings > Providers > Edit Provider |
| RenderingProviderExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | N/A |
| SupervisingProviderID | The unique identifier of the supervising provider. | Settings > Providers > Edit Provider |
| SupervisingProviderExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | N/A |
| ReferringProviderID | The unique identifier of the referring provider. | Settings > Other List > Find Referring Physicians > Edit Referring Physician |
| ReferringProviderExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | N/A |
| ServiceLocationID | The unique identifier of the service location. | N/A |
| ServiceLines | The items in this section may be repeated for each service line. | Encounters > Find Encounter > Edit Encounter |
| ServiceLineID | The unique identifier of the service line. | N/A |
| EncounterProcedureExternalID | The unique identifier of the service line in a third-party software system (used for integration purposes). | N/A |

## Update Patient

This operation updates an existing patient with the information included within the request. This operation is only available with the 2.0 interface and above.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| Practice | To select a specific practice, caller would provide one of the sub- fields below. | Yes |
| PracticeID | The unique identifier associated with the practice related to this patient. | Yes |
| PracticeName | The name of the practice related to this patient. | Yes |
| PracticeExternalID | The unique identifier of the practice in a third-party software system (used for integration purposes). | No |
| PatientID | The unique identifier of the patient. | No |
| PatientExternalID | The unique identifier of the patient in a third-party software system (used for integration purposes). | No |
| Prefix | The prefix of the patient. | No |
| FirstName | The first name of the patient. | Yes |
| MiddleName | The middle name of the patient. | No |
| LastName | The last name of the patient. | Yes |
| Suffix | The suffix of the patient. | No |
| SocialSecurityNumber | The social security number of the patient. | No |
| DateofBirth | The date of birth of the patient (e.g., YYYY-MM-DD). | No |
| Gender | Available values:   * Male * Female * Unknown | No |
| MedicalRecordNumber | The medical record number for the patient. | No |
| MaritalStatus | Available values:  A = Annulled D = Divorced  I = Interlocutory  L = Legally Separated  M = Married  P = Polygamous  S = Single/Never Married  T = Domestic Partner W = Widowed | No |
| ReferralSource | The referral source of the patient. | No |
| AddressLine1 | The first address line of the patient. | No |
| AddressLine2 | The second address line of the patient. | No |
| City | The city of the patient. | No |
| State | The state of the patient. | No |
| Country | The country of the patient (if different than the U.S.). | No |
| ZipCode | The zip code of the patient. | No |
| HomePhone | The home phone number of the patient. | No |
| HomePhoneExt | The home phone number extension of the patient. | No |
| WorkPhone | The work phone number of the patient. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| WorkPhoneExt | The work phone number extension of the patient. | No |
| MobilePhone | The mobile phone number of the patient. | No |
| MobilePhoneExt | The mobile phone number extension of the patient. | No |
| EmailAddress | The email address of the patient. | No |
| Note | An initial note on the patient record in the notes area. | No |
| CollectionCategoryName | The name of the collection category related to this patient. | No |
| Guarantor | Structure described below. | No |
| DifferentThanPatient | True if guarantor is different than the patient. | No |
| RelationshipToGuarantor | The patient relationship to the guarantor. | No |
| GuarantorPrefix | The prefix of the guarantor if different than the patient. | No |
| GuarantorFirstName | The first name of the guarantor if different than the patient. | No |
| GuarantorMiddleName | The middle name of the guarantor if different than the patient. | No |
| GuarantorLastName | The last name of the guarantor if different than the patient. | No |
| GuarantorSuffix | The suffix of the guarantor if different than the patient. | No |
| AddressLine1 | The first address line of the guarantor. | No |
| AddressLine2 | The second address line of the guarantor. | No |
| City | The city of the guarantor. | No |
| State | The state of the guarantor. | No |
| Country | The country of the guarantor (if different than the U.S.). | No |
| ZipCode | The zip code of the guarantor. | No |
| Employer | If employer ID matches an existing employer, then update the information. Otherwise, add a new employer. | No |
| EmploymentStatus | The employment status of the patient. | No |
| EmployerID | The unique identifier of the employer related to this patient. | No |
| EmployerName | The name of the employer related to this patient. | No |
| AddressLine1 | The first address line of the employer. | No |
| AddressLine2 | The second address line of the employer. | No |
| City | The city of the employer. | No |
| State | The state of the employer. | No |
| Country | The country of the employer (if different than the U.S.). | No |
| ZipCode | The zip code of the employer. | No |
| DefaultRenderingProvider | To select a specific provider, caller would provide one of the sub- fields below. | No |
| ProviderID | The unique identifier of the default rendering provider related to this patient. | No |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | No |
| FullName | The name of the default rendering provider related to this patient. | No |
| PrimaryCarePhysician | To select a specific provider, caller would provide one of the sub- fields below. | No |
| ProviderID | The unique identifier of the primary care physician related to this patient. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | No |
| FullName | The name of the primary care physician related to this patient. | No |
| ReferringProvider | To select a specific provider, caller would provide one of the sub- fields below. | No |
| ProviderID | The unique identifier of the referring provider related to this patient. | No |
| ExternalID | The unique identifier of the provider in a third-party software system (used for integration purposes). | No |
| FullName | The name of the referring provider related to this patient. | No |
| DefaultServiceLocation | To select an existing default service location, caller would provide the ID of name. Otherwise, a new service location is created with the information in the sub-fields below. | No |
| LocationID | The unique identifier of the default service location related to this patient. | No |
| LocationName | The name of the default service location related to this patient. | No |
| AddressLine1 | The first address line of the default service location related to this patient. | No |
| AddressLine2 | The second address line of the default service location related to this patient. | No |
| City | The city of the default service location related to this patient. | No |
| State | The state of the default service location related to this patient. | No |
| Country | The country of the default service location related to this patient. | No |
| ZipCode | The zip code of the default service location related to this patient. | No |
| BillingName | The billing name of the default service location related to this patient. | No |
| Phone | The phone number of the default service location related to this patient. | No |
| PhoneExt | The phone number extension of the default service location related to this patient. | No |
| FaxPhone | The fax number of the default service location related to this patient. | No |
| FaxPhoneExt | The fax number extension of the default service location related to this patient. | No |
| NPI | The national provider identifier for the service location. | No |
| FacilityIDType | The Facility ID Type for the service location. | No |
| FacilityID | The unique identifier of the facility. | No |
| CLIANumber | The CLIA number of the facility. | No |
| POS | The place of service (POS) code of the facility. | No |
| Cases | Multiple cases may be specified. | No |
| Case | To add a case to a new patient, the caller would provide one or more of the sub- fields below and/or one or more of the sub- fields in each of the insurance policy | Case |
| ExternalID | The unique identifier of the case in a third- party software system (used for integration purposes). | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| Name | The name of the case related to this patient. | No |
| Description | The description of the case related to this patient. | No |
| ReferringProviderID | The unique identifier of the referring provider associated with the case related to this patient. | No |
| ReferringProviderFullName | The name of the referring provider associated with the case related to this patient. | No |
| SendPatientStatements | If patient statements should be sent for charges under the case related to this patient, then true. Otherwise, false. | No |
| PayerScenario | The payer scenario of the case related to this patient. | No |
| CaseCondition | Structure described below. | No |
| RelatedToAutoAccident | If the case for this patient is related to an auto-accident, then true. Otherwise, false. | No |
| RelatedToAutoAccidentState | The state of the auto accident for the case related to this patient. | No |
| RelatedToEmployment | If the case for this patient is related to employment, then true. Otherwise, false. | No |
| RelatedToPregnancy | If the case for this patient is related to pregnancy, then true. Otherwise, false. | No |
| RelatedToAbuse | If the case for this patient is related to abuse, then true. Otherwise, false. | No |
| RelatedToOther | If the case for this patient is related to other, then true. Otherwise, false. | No |
| RelatedToEPSDT | If the case for this patient is related to EPSDT, then true. Otherwise, false. | No |
| RelatedToFamilyPlanning | If the case for this patient is related to family planning, then true. Otherwise, false. | No |
| RelatedToEmergency | If the case for this patient is related to an emergency, then true. Otherwise, false. | No |
| CaseDates | Structure described below. | No |
| InjuryStartDate | The start date of the injury of the case related to this patient (e.g., YYYY-MM-DD). | No |
| InjuryEndDate | The end date of the injury of the case related to this patient (e.g., YYYY-MM-DD). | No |
| SameorSimilarIllnessStartDate | The start date of the same or similar illness of the case related to this patient (e.g., YYYY-MM-DD). | No |
| SameorSimilarIllnessEndDate | The end date of the same or similar illness of the case related to this patient (e.g., YYYY-MM-DD). | No |
| DatesUnabletoWorkStartDate | The start date the patient was unable to work for the case related to this patient (e.g., YYYY-MM-DD). | No |
| DatesUnabletoWorkEndDate | The end date the patient was unable to work for the case related to this patient (e.g., YYYY-MM-DD). | No |
| DatesRelatedDisabilityStartDate | The start date of a disability for the case related to this patient (e.g., YYYY-MM-DD). | No |
| DatesRelatedDisabilityEndDate | The end date of a disability for the case related to this patient (e.g., YYYY-MM-DD). | No |
| RelatedHospitalizationStartDate | The start date of a hospitalization for the case related to this patient (e.g., YYYY-MM-DD). | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| RelatedHospitalizationEndDate | The end date of a hospitalization for the case related to this patient (e.g., YYYY-MM-DD). | No |
| LastMenstrualPeriodDate | The last menstrual period date of the case related to this patient (e.g., YYYY-MM-DD). | No |
| LastSeenDate | The date the patient was last seen for the case related to this patient (e.g., YYYY-MM-DD). |  |
| ReferralDate | The referral date for the case related to this patient (e.g., YYYY- MM-DD). | No |
| AcuteManifestationDate | The acute manifestation date of the case related to this patient (e.g., YYYY-MM-DD). | No |
| LastX-RayDate | The last x-ray date of the case related to this patient (e.g., YYYY- MM-DD). | No |
| AccidentDate | The accident date of the case related to this patient (e.g., YYYY- MM-DD). | No |
| Insurance Policies | Multiple insurance policies may be added to a case. | No |
| Insurance Policy | To select an existing insurance company or insurance plan, caller would provide either the ID or the name. Otherwise, a new insurance company and/or insurance plan is created with the information in the sub- fields below. If none of the fields are provided, no primary insurance policy is created. | No |
| CompanyID | The unique identifier of the insurance company associated with the primary insurance policy on the case for this patient. | No |
| CompanyName | The name of the insurance company associated with the primary insurance policy on the case for this patient. | No |
| PlanID | The unique identifier of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| PlanName | The name of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| ExternalID | The unique identifier of the insurance policy in a third-party software system (used for integration purposes). | No |
| AddressLine1 | The first address line of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| AddressLine2 | The second address line of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| City | The city of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| State | The state of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| Country | The country of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| ZipCode | The zip code of the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| Adjuster | Structure described below. | No |
| Prefix | The prefix of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| FirstName | The first name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| MiddleName | The middle name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| LastName | The last name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| Suffix | The suffix of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| PhoneNumber | The adjuster phone number with the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| PhoneNumberExt | The adjuster phone number extension with the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| FaxNumber | The adjuster fax number with the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| FaxNumberExt | The adjuster fax number extension with the insurance plan associated with the primary insurance policy on the case for this patient. | No |
| PolicyNumber | The policy number associated with the primary insurance policy on the case for this patient. | No |
| PolicyGroupNumber | The group number associated with the primary insurance policy on the case for this patient. | No |
| Copay | The copay associated with the primary insurance policy on the case for this patient. | No |
| Deductible | The deductible associated with the primary insurance policy on the case for this patient. | No |
| EffectiveStartDate | The effective start date associated with the primary insurance policy on the case for this patient (e.g., YYYY-MM-DD). | No |
| EffectiveEndDate | The effective end date associated with the primary insurance policy on the case for this patient (e.g., YYYY-MM-DD). | No |
| Insured | Structure described below. | No |
| PatientRelationshipToInsured | The patient relationship to the insured associated with the primary insurance policy on the case for this patient. | No |
| Prefix | The prefix of the insured associated with the primary insurance policy on the case for this patient. | No |
| FirstName | The first name of the insured associated with the primary insurance policy on the case for this patient. | No |
| MiddleName | The middle name of the insured associated with the primary insurance policy on the case for this patient. | No |
| LastName | The last name of the insured associated with the primary insurance policy on the case for this patient. | No |
| Suffix | The suffix of the insured associated with the primary insurance policy on the case for this patient. | No |
| AddressLine1 | The first address line of the insured associated with the primary insurance policy on the case for this patient. | No |
| AddressLine2 | The second address line of the insured associated with the primary insurance policy on the case for this patient. | No |
| City | The city of the insured associated with the primary insurance policy on the case for this patient. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| State | The state of the insured associated with the primary insurance policy on the case for this patient. | No |
| Country | The country of the insured associated with the primary insurance policy on the case for this patient. | No |
| ZipCode | The zip code of the insured associated with the primary insurance policy on the case for this patient. | No |
| IDNumber | The ID number of the insured associated with the primary insurance policy on the case for this patient. | No |
| SocialSecurityNumber | The social security number of the insured associated with the primary insurance policy on the case for this patient. | No |
| DateofBirth | The date of birth of the insured associated with the primary insurance policy on the case for this patient (e.g., YYYY-MM-DD). | No |
| Gender | The gender of the insured associated with the primary insurance policy on the case for this patient. | No |
| PolicyThroughEmployer | True if the insurance policy is through the patient’s employer. | No |
| Employer | The name of the employer related to the insurance policy. | No |
| Active | True is insurance policy is active, otherwise false. | No |
| Precedence | An integer value to set the precedence (e.g., primary=1, secondary=2, etc.). | No |
| PolicyNotes | The notes on the primary insurance policy on the case for this patient. | No |
| Authorizations | Multiple authorizations may be specified. | No |
| Authorization | The authorization number associated with the first authorization entered for this patient. | No |
| InsurancePlanID | The insurance plan ID associated with the first authorization entered for this patient. | No |
| InsurancePlanName | The insurance plan name associated with the first authorization entered for this patient. | No |
| Number | The authorization number associated with the first authorization entered for this patient. | No |
| NumberOfVisits | The number of visits authorized with the first authorization entered for this patient. | No |
| NumberOfVisitsUsed | The number of visits used for the first authorization entered for this patient. | No |
| ContactFullName | The insurance contact name associated with the first authorization entered for this patient. | No |
| ContactPhone | The insurance contact phone number associated with the first authorization entered for this patient. | No |
| ContactPhoneExt | The insurance contact phone number extension associated with the first authorization entered for this patient. | No |
| Notes | The authorization notes associated with the first authorization entered for this patient. | No |
| StartDate | The start date associated with the first authorization entered for this patient (e.g., YYYY-MM-DD). | No |
| EndDate | The end date associated with the first authorization entered for this patient (e.g., YYYY-MM-DD). | No |
| Alert | Structure described below. | No |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| Message | The alert message related to this patient. | No |
| ShowWhenDisplayingPatientDetails | True if the alert message related to this patient should show when displaying patient details. False otherwise. | No |
| ShowWhenSchedulingAppointments | True if the alert message related to this patient should show when scheduling appointments. False otherwise. | No |
| ShowWhenEnteringEncounters | True if the alert message related to this patient should show when entering encounters. False otherwise. | No |
| ShowWhenViewingClaimDetails | True if the alert message related to this patient should show when viewing claim details. False otherwise. | No |
| ShowWhenPostingPayments | True if the alert message related to this patient should show when posting payments. False otherwise. | No |
| ShowWhenPreparingPatientStatements | True if the alert message related to this patient should show when preparing patient statements. False otherwise. | No |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| PatientID | The unique identifier of the patient that was updated. | Patients > Find Patient > Edit Patient |
| PatientExternalID | The unique identifier of the patient in a third- party software system (used for integration purposes). | N/A |
| PracticeID | The unique identifier of the practice associated with this patient. | Settings > Company > Find Practice > Edit Practice |
| PracticeExternalID | The unique identifier of the practice in a third- party software system (used for integration purposes). | N/A |
| PracticeName | The name of the practice associated with this patient. | Settings > Practice Information |
| EmployerID | The unique identifier of the employer. | N/A |
| DefaultServiceLocationID | The unique identifier of the default service location. | N/A |
| Cases | Section includes information about cases updated. | Patients > Find Patient > Edit Patient > Cases |
| Case | Section may repeat if multiple cases were updated. | Patients > Find Patient > Edit Patient > Cases |
| CaseID | The unique identifier of the case is returned. | Patients > Find Patient > Edit Patient > Cases > Edit Case |
| CaseExternalID | The unique identifier of the case in a third-party software system (used for integration purposes). | N/A |
| Insurance Policies | Section includes information about insurance policies updated. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| InsurancePolicyCompanyID | The unique identifier of the insurance company related to the primary insurance policy. | Settings > Insurance > Insurance Companies > Edit Insurance Company |
| InsurancePolicyPlanID | The unique identifier of the insurance plan related to the primary insurance policy. | Settings > Insurance > Find Insurance Plan > Edit Insurance Plan |
| InsurancePolicyID | The unique identifier of the primary insurance policy. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |
| InsurancePolicyExternalID | The unique identifier of the insurance policy in a third-party software system (used for integration purposes). | N/A |
| Authorizations | Section includes information about authorizations updated. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| Authorization | Section may repeat if multiple authorizations were updated. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Authorizations |
| AuthorizationID | The unique identifier of the authorization updated. | N/A |
| InsurancePolicyID | The unique identifier of the insurance policy related to the authorization. | Patients > Find Patient > Edit Patient > Cases > Edit Case > Insurance Policy |

## Delete Appointment

This operation deletes an existing appointment with the information included within the request. This operation is only available with the 2.0 interface and above.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| CustomerKey | The customer key associated with your customer account with Tebra. | Yes |
| User | The username associated with the user account with authorized security permissions to the API. | Yes |
| Password | The password associated with the user account with authorized security permissions to the API. | Yes |
| AppointmentID | The unique identifier of the appointment. | Yes |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| Deleted | Returns true if appointment successfully deleted. | N/A |
| AppointmentID | The unique identifier of the appointment. | N/A |

## Delete Document

This operation deletes an existing document with the information included within the request.

### The Request

The following information may be provided as parameters to the request for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| DocumentID | The unique identifier for the document. | Yes |

### The Response

The following information will be returned with the response for this operation.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| Deleted | Returns true if document successfully deleted. | N/A |
| DocumentID | The unique identifier of the document. | N/A |

# API Support

If you have technical questions about the Tebra Web Services API, [create a Customer Care](https://helpme.tebra.com/Contact_Us/Customer_Care_Center) [case](https://helpme.tebra.com/Contact_Us/Customer_Care_Center).

Tebra can only provide support with the API on the Tebra side. If you would like to include an example of your code, paste the request and response XMLs into the *Description* field of the form.

# API Guide Changelog

The API Guide Changelog includes additions, deletions, corrections, and updates to operations outlined in the guide within the past year.

## April 2025

On April 17, 2025, additions were made.

The following was added to Sections 4.13 Create Appointment, 4.13.1 The Request and 4.18 Update Appointment, 4.18.1 The Request.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| AppointmentMode | Available values:  - InOffice  -Telehealth | No |

The following was added to Sections 4.13 Create Appointment, 4.13.2 The Response and 4.18 Update Appointment, 4.18.2 The Response.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| AppointmentMode | Available values:  - InOffice  -Telehealth | Web Platform > Calendar > New Appointment > Appointment Mode |

On April 10, 2025, the following was updated under Section 4.15 Create Encounter, 4.15.1 The Request.

From:

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| Service Lines | The service lines on the encounter. | Yes |

To:

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| Service Lines | The service lines on the encounter.  *Note:* When there are multiple service lines, the service lines created on the encounter will preserve the order in which they are received. | Yes |

## February 2025

On February 28, 2025, updates and additions were made.

### Updates

The following was updated under Section 4.3 Get Charges, 4.3.2 The Response. From:

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| AllowedAmount | The allowed amount expected for this charge, based upon the insurance contract settings. | N/A |
| ExpectedAmount | The expected reimbursement amount expected for this charge, based upon the insurance contract settings. | N/A |

To:

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| AllowedAmount | The allowed amount expected for this charge, based upon the active insurance contract settings. | Settings > Contracts and Fees > Contract Rates > Active Insurance Contract > Contract Rate |
| ExpectedAmount | The allowed amount expected for this charge, based upon the active insurance contract settings. | Settings > Contracts and Fees > Contract Rates > Active Insurance Contract > Contract Rate |

### Additions

The following sections were added:

* Sections [4.14 Create Document](#_bookmark29), [4.14.1 The Request](#_bookmark30), [4.14.2 The Response](#_bookmark27)
* Sections [4.22 Delete Document](#_bookmark38), [4.22.1 The Request](#_bookmark39), [4.22.2 The Response](#_bookmark40)

## December 2024

On December 13, 2024, the following was added to Section 4.6 Get Patients, 4.6.1 The Request as a correction.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| PracticeID | The unique identifier associated with the practice related to these patients. | Yes |

## November 2024

On November 26, 2024, the following was added to Section 4.2 Get Appointments, 4.2.2 The Response.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ServiceLocationID | The unique identifier for the location related to this appointment. | N/A |
| AppointmentDuration | The duration, in minutes, of the appointment. | N/A |
| AppointmentReasonID1 | The unique identifier of the first reason entered for this appointment. | N/A |
| AppointmentReasonID2 | The unique identifier of the second reason entered for this appointment. | N/A |
| AppointmentReasonID3 | The unique identifier of the third reason entered for this appointment. | N/A |
| AppointmentReasonID4 | The unique identifier of the fourth reason entered for this appointment. | N/A |
| AppointmentReasonID5 | The unique identifier of the fifth reason entered for this appointment. | N/A |
| AppointmentReasonID6 | The unique identifier of the sixth reason entered for this appointment. | N/A |
| AppointmentReasonID7 | The unique identifier of the seventh reason entered for this appointment. | N/A |
| AppointmentReasonID8 | The unique identifier of the eighth reason entered for this appointment. | N/A |
| AppointmentReasonID9 | The unique identifier of the ninth reason entered for this appointment. | N/A |
| AppointmentReasonID10 | The unique identifier of the tenth reason entered for this appointment. | N/A |
| ResourceID1 | The unique identifier of the first provider or scheduling resource related to this appointment. | N/A |
| ResourceID2 | The unique identifier of the second provider or scheduling resource related to this appointment. | N/A |
| ResourceID3 | The unique identifier of the third provider or scheduling resource related to this appointment. | N/A |
| ResourceID4 | The unique identifier of the fourth provider or scheduling resource related to this appointment. | N/A |
| ResourceID5 | The unique identifier of the fifth provider or scheduling resource related to this appointment. | N/A |
| ResourceID6 | The unique identifier of the sixth provider or scheduling resource related to this appointment. | N/A |
| ResourceID7 | The unique identifier of the seventh provider or scheduling resource related to this appointment. | N/A |
| ResourceID7 | The unique identifier of the seventh provider or scheduling resource related to this appointment. | N/A |
| ResourceID8 | The unique identifier of the eighth provider or scheduling resource related to this appointment. | N/A |
| ResourceID9 | The unique identifier of the ninth provider or scheduling resource related to this appointment. | N/A |
| ResourceID10 | The unique identifier of the tenth provider or scheduling resource related to this appointment. | N/A |
| ResourceTypeID1 | The unique identifier of the first resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | WHERE TO FIND IN TEBRA |
| ResourceTypeID2 | The unique identifier of the second resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID3 | The unique identifier of the third resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID4 | The unique identifier of the fourth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID5 | The unique identifier of the fifth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID6 | The unique identifier of the sixth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID7 | The unique identifier of the seventh resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID8 | The unique identifier of the eighth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID9 | The unique identifier of the ninth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |
| ResourceTypeID10 | The unique identifier of the tenth resource type entered for this appointment.  Values:  1 = Doctor  2 = Practice Resource | N/A |

## October 2024

On October 1, 2024, the following was added to Section 4.14 Create Encounter, 4.14.1 The Request.

|  |  |  |
| --- | --- | --- |
| FIELD NAME | DESCRIPTION | REQUIRED |
| PrimaryClaimType | Available values:  CMS1500 = Primary claim is a professional claim UB04 = Primary claim is an institutional claim | No |
| SecondaryClaimType | Available values:  CMS1500 = Secondary claim is a professional claim UB04 = Secondary claim is an institutional claim | No |
| UB04 | Fields related to institutional claims. | No |
| PrincipalDiagnosisCode | The principal diagnosis code related to this charge. | No |
| PrincipalProcedureCode | The principal procedure code related to this charge. | No |
| PrincipalProcedureDate | The principal procedure service date related to the charge. | No |
| AdmittingDiagnosisCode | The admitting diagnosis code for the patient at the time of admission and may differ from the principal diagnosis code. | No |
| AdmissionDate | The date the patient was admitted as an inpatient to the facility. | No |
| AdmissionCode | The admission code related to the type and priority of the inpatient admission to the facility. | No |
| Remarks | Additional information necessary for claim adjudication. | No |
| PointOfOriginCode | The point of origin code related to the source or method of  the patient’s referral for admission. | No |
| DischargeStatusCode | The discharge status code related to where the patient is being discharged or transferred to at the end of their facility stay such as an acute/post-acute care facility. | No |
| BillType | The submit reason for the claim. | No |
| HealthCodes | The health codes related to the charge. | No |
| HealthCodeType | Available values:   * Condition * Occurrence * Other Diagnosis * Value | No |
| HealthCode | The code related to the health code type of Condition, Occurrence, or Value. | No |
| DiagnosisCode | The code related to the health code type of Other Diagnosis. | No |
| DateFrom | The start date related to the Occurrence health code type and code. | No |
| DateTo | The end date related to the Occurrence health code type and code. | No |
| Amount | The amount related to the Value health code type and code. | No |



# The Digital Backbone for Practice Success

### Tebra is the digital backbone built

### for both patient and provider well-being. From practice growth technology to clinical and financial software, our complete operating system is structured to modernize every step of the patient journey and support the connected practice of the future