**Synergy Billing Interface Design Document**

Duration: 31-Dec-12 to 11-Jan-13

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1. Login

For each event, the authentication process is done to communicate with Synergy. The username and password will be available to edit on the openemr as needed. Authentication is achieved with the call LoginAdmin().

|  |  |
| --- | --- |
| **Fields** | **Data Retrieved from Openemr** |
| username | From users table |
| password | From users table |

1. Patient Demographics

* Whenever a new patient is created or the existing patient's demographics data is modified, the patient's data are automatically updated to the Synergy.
* This process can be done with the call to CreatePatient(), DeletePatient() and UpdatePatient().

|  |  |
| --- | --- |
| **Fields** | **Data Retrieved from Openemr** |
| Address  Address1  Address2  City  State  Zip | From Demographics, Patient Info tab  **ADD a Address 2**  From Demographics, Patient Info tab  From Demographics, Patient Info tab  From Demographics, Patient Info tab |
| Age | From Demographics, Patient Info tab |
| AssociateAgency  AgencyCode  AgencyName | From Demographics, Agency tab  From Demographics, Agency tab |
| Birthdate | From Demographics, Patient Info tab |
| Extension | **SKIP** |
| FullName  FirstName  MiddleInitial  LastName  Suffix | From Demographics, Patient Info tab  From Demographics, Patient Info tab  From Demographics, Patient Info tab  **SKIP** |
| Gender | From Demographics, Patient Info tab |
| Name | From Demographics, Patient Info tab |
| PatientCode  ID  Guid | 'pid' column from patient\_data table  **SKIP** |
| SSN  Number | From Demographics, Patient Info tab |
| Telephone  Number | “Home Phone” from Patient Info in Demographics |
| Workphone  Number | “Work Phone” from Patient Info in Demographics |
| AgencyFee  Key  Value | **How is this constructed and used?**  **→ what ID is used on the SOS side?** |
| Archive | **UNUSED** |
| CahpsOptOut | **UNUSED** |
| CareStatus | From “Admit Status” in episodes |
| Categories | **UNUSED** |
| CurrentIntake | **Unknown, needs research** |
| DoctorCode  ID  Guid | **Demog Screen->Preferences->Physician**  \*\*Need Clarification\*\* - **Synergy?** |
| Employer | From Demographics, Employer tab |
| Language | From Demographics, Background tab |
| Notes | From Demographics, Preferences tab |
| MaritalStatus | From Demographics, Patient Info tab |
| MedAlerts | **UNUSED** |
| Occupation | From Demographics, Employer tab |
| OfficeCode | **From Demographics, Agency Tab** |
| PrimaryDoctorCode | From Demographics, Preferences tab  Needs confirmation |
| ReferralCode | From Demographics, Physician(s) tab  Needs confirmation |
| Religion  Key  Value | **UNUSED** |
| Remarks1 | **UNUSED** |
| CurrentPhysCode | **From Demographics, Physicians tab, Primary** |
| AdmitPhysCode | **UNUSED** |
| CurrentAdmCode | **Backend need research** |
| AdmitReferralCode | **Backend need research** |
| SOC | Available in All OASIS forms. Specify a particular form to retrieve this data. |
| AdminCode | **Backend need research** |
| TimesAdmitted | **Backend need research** |
| Balance | “pay\_amount“ column from ar\_activity table |

1. Posting Visit Notes

* Whenever a new visit is created or the existing visit is modified, the encounters data are automatically updated to the Synergy.
* This process can be done with the call to AddVisitNote(), EditVisitNote() and DeleteVisitNote() functions.

|  |  |
| --- | --- |
| **Fields** | **Data Retrieved from Openemr** |
| ChartLabel |  |
| Agency | From Demographics, Agency tab |
| PatientCode | 'pid' column from patient\_data table |
| PatientsName | From Demographics, Patient Info tab |
| MedicalRecordNumber | **'pid' column from patient\_data table** |
| IntakeCode | **UNUSED** |
| StartOfCare | From Encounter – Date of Service |
| ChartStatus | **UNUSED** |
| InactiveStatusDate | \*\*Need Clarification\*\* |
| Coverage | \*\*Need Clarification\*\* |
| CurrentPhysician | From Demographics, Preferences tab |
| CurrentCaseAdministrator | \*\*Need Clarification\*\* |
| Face2FaceDate | **NEED THIS ( \*\* Not In Object)** |
| Label | \*\*Need Clarification\*\* |
| ChargeItem |  |
| Label | \*\*Need Clarification\*\* |
| Caregiver | **NEED THIS** |
| TimeIn | **NEED THIS** |
| TimeOut | **NEED THIS** |
| BillingUnits | **NEED THIS** |
| BillInsurance | **NEED THIS** |
| FinalClaimSent | **UNUSED** |
| Remarks | **UNUSED** |
| NotesIn | **NEED THIS (insurance related)** |
| Verified | **NEED THIS** |
| PlaceOfService  Key  Value | Place of Service of the Facility Chosen in Encounter - **NEED THIS** |
| TypeOfService  Key  Value | \*\*Need Clarification\*\* - **NEED THIS, visit** |
| Cost | **NOT NEEDED** |
| Modifiers | **NEED THIS** |
| ReimbursementRate | **NOT NEEDED** |
| ChargeDiagnosisReference | **NEED THIS – justification link** |
| Claim\_Diagnoses | **NEED THIS** |
| LocalUse | **NOT NEEDED** |
| DatePayrollProcessed | **NOT NEEDED** |

1. Exporting OASIS forms and Plan of Care

* When a OASIS form is created, a button named “Export to Synergy” is created near the “Generate B1” button. This button appears only for the OASIS forms and not for the rest of the forms.
* On clicking the “Export to Synergy” button, the saved data of the particular OASIS form that are required for export to Synergy are exported to the Synergy.
* Exporting of OASIS forms and Plan of Care is done using the Class OASISAND485IMPORT.

|  |  |  |
| --- | --- | --- |
| **Fields** | **Data Retrieved from Openemr** | **Status** |
| AgencyCode | From Demographics, Agency Tab |  |
| PatientCode | From Demographics, Patient Info tab |  |
|  | |  |
| AdmissionSourceCode | “Place of Service” of the Facility Chosen in Encounter.  Also in Demographics, “Referral” Tab.  \*\*Need Clarification\*\* |  |
| Allergies | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| AltPatientCode | **NOT NEEDED** |  |
| AP | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| AP\_Desc | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| AssessmentFormType | -1 for OASIS forms |  |
| B1 | OASIS B1 string |  |
| Batch\_TimeStamp | **INTERNAL** |  |
| Caregiver\_Signed | From E-Sign |  |
| CBSACode | **UNUSED** |  |
| CertEnd | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| Certification | **NEED THIS (sign/auth on Plan of Care)** |  |
| CertStart | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| DateLastContactedPhysician | **NEED THIS (OASIS)** |  |
| DateLastSeenByPhysician | **NEED THIS (OASIS)** |  |
| DateReceived | Calculated when received by Synergy |  |
| DateSent | Calculated when sending to Synergy |  |
| DiagCodes | There are many diagnosis codes available like Primary Diagnosis, Payment Diagnosis, Inpatient Diagnosis, Changed Medication Regimen Diagnosis. Which Diagnosis Codes have to be entered here? |  |
| DiagOnset | **In visit form** |  |
| DiagIndicators | **NEED THIS (OASIS)**  **In Obj as DxIndicators** | **Added (for Primary Diagnosis Codes)** |
| DR\_ ADDR1 | From users table |  |
| DR\_ ADDR2 | From users table |  |
| DR\_CITY | From users table |  |
| DR\_ID | From users table |  |
| DR\_NAME | From users table |  |
| DR\_PHONE | From users table |  |
| DR\_STATE | From users table |  |
| DR\_UPIN | From users table |  |
| DR\_ZIP | From users table |  |
| FL | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| FL\_Desc | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| FormType | \*\*Need Clarification\*\* **… ?** |  |
| FunctionalLimitations | Not **available in OASIS-C DISCHARGE ASSESSMENT, OASIS-C TRANSFER** |  |
| Goals | **all M codes** | **Please provide more details. What does “all M codes” refer to? There are no M codes for these fields in OASIS Forms.** |
| GRS\_Account\_KEY | \*\*Need Clarification\*\* **all M codes** |  |
| GRS\_OASIS\_KEY | \*\*Need Clarification\*\* **all M codes** |  |
| IdentifyCaseAdministrator | \*\*Need Clarification\*\* **all M codes** |  |
| Item99 | \*\*Need Clarification\*\* **all M codes** |  |
| LastInpatientStayAdmission | \*\*Need Clarification\*\* **all M codes** |  |
| LastInpatientStayDischarge | \*\*Need Clarification\*\* **all M codes** |  |
| MedicareCovered | M0063 |  |
| Medication | M0063 |  |
| MS | Mental Status under Safety Measures or NEURO/EMOTIONAL/BEHAVIORAL STATUS  Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| MS\_Desc | Mental Status under Safety Measures or NEURO/EMOTIONAL/BEHAVIORAL STATUS  Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| Nutrition | Nutrition under Nutritional Status, Vital Signs  Not available in OASIS-C NURSE RECERTIFICATION, OASIS-C PT RECERT, OASIS-C TRANSFER |  |
| Orders | ORDERS under Skilled Nurse To Provide Skilled Nursing Visits, HHA, MSW (or) Physical Therapy Orders and Goals  Not available in OASIS-C DISCHARGE ASSESSMENT, OASIS-C NURSE RECERTIFICATION, OASIS-C PT SOC/ROC, OASIS-C TRANSFER |  |
| PatientAddress1 | From Patient Tracking Information |  |
| PatientAddress2 | From Patient Tracking Information |  |
| PatientCity | From Patient Tracking Information |  |
| PatientHomePhone | From Patient Tracking Information |  |
| PatientReceivingCare | 0 - yes |  |
| POTSign | **Plan of Treatment – e-signed by Phy** |  |
| Prognosis | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| ReferredByCode | **M Code** |  |
| Safety | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| SupplementaryPOTonFile | **NEED TO ADD** |  |
| Supplies | Not available in OASIS-C DISCHARGE ASSESSMENT and OASIS-C TRANSFER. |  |
| TypeOfFacility | **Standard Place of Service from 485/OASIS** |  |
| VerbalSOC | **Verbal SOC need to be add to Plan of Care** |  |

1. Library Data

Some of the library data can be obtained from openemr. This can be done as one time synchronization of the following information,

a. Caregivers  
b. Referring Sources  
c. Insurance carriers  
d. Facilities  
e. Diagnoses

**Clarification:**

Will these be an automated function to sync from openemr to synergy or will be entered manually onto the synergy.