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1. API to create Invoice

Request

URL : https://ehr.charmtracker.com/api/ehr/v1/invoices

Method : POST

Sample JSON Input Spec for create Invoice API

```
{
        "action":"save | approve",
        "facility_id": "100000000000000179",
        "patient_id": "100000000000002027",
        "patient_full_name": "Ajay Kumar",
        "invoice_date": "2020-05-30",
        "invoice_type": "Invoice | Credit Note",
        "invoice_subtype": "Procedure Invoice | Product Invoice | Lab Invoice | Collective
        Invoice",
        "apply_patient_credit": "true",
        "used_credit_amount": "50.00",
        "pay_invoice_in_full": "false | true",
        "pay_products_in_full": "false | true",
        "pay_copay_in_full": "false | true",
        "pay_non_covered_services": "false | true",
        "provider_id": "10000000000067384",
        "provider_name": "Dr. John Peter",
        "invoice_terms": "Products once sold cannot be taken back after 7 days",
        "invoice_notes": "Take medicines at time as prescribed by the physician",
        "consultation_id": "10000000000034636",
        "insurance_id": "100000000000002821",
        "member_id": "10000000000067358", [For external API calls only]
        "pricing_profile_id": "10000000000067385",

        "procedures":
                [
```

```
                    {
                    "item_charge": "210.0",
                    "item_quantity": "1",
                    "code_id": "100000000000011007",
                    "discount_percentage": "10.0",
                    "discount_amount": "10.0",
                    "tax_name": "Service Tax",
                    "tax_percentage": "10.00",
                    "tax_name_2": "Value Added Tax",
                    "tax_percentage_2": "10.00",
                    "modifier_1":"25",
                    "modifier_2":"FH",
                    "modifier_3":"",
                    "modifier_4":"",
                    "place_of_service":"11",
                    "related_diagnosis_ids": "100000000000083738, 100000000000097382"
                    }
            ],
    "products":
            [

            {
                        "item_charge": "11",
                        "item_quantity": "2",
                        "product_id": "100000000000011083",
                        "inventory_id": "100000000000873672",
                        "cost_price": "10",
                        "discount_percentage": "10.0",
                        "discount_amount": "2.0",
                        "tax_name": "Sales Tax",
                        "tax_percentage": "10.00",
                        "tax_name_2": "Value Added Tax",
                        "tax_percentage_2": "10.00"
                        }
```

```json
            ],
    "labs":
        [
                {
                "item_charge": "210.0",
                "item_quantity": "1",
                "code_id": "100000000000011007",
                "discount_percentage": "10.0",
                "discount_amount": "10.0",
                "tax_name": "Service Tax",
                "tax_percentage": "10.00",
                "tax_name_2": "Value Added Tax",
                "tax_percentage_2": "10.00",
                "modifier_1":"25",
                "modifier_2":"FH",
                "modifier_3":"",
                "modifier_4":"",
                "place_of_service":"11",
                "related_diagnosis_ids": "100000000000083738, 100000000000097382"
                }
            ],
    "payments":
        [
                {
                        "payment_amount": "130.0",
                        "payment_method": "Check | Cash",
                        "reference_number": "receipt reference number"
                }
            ]
        }
```

Notes for Create Invoice API:

1. Keys specified in blue colour are optional

2. Keys specified in blue colour and *italic font* are applicable for Insurance enabled Practices. As of now, Insurance is supported for Practices operating in USA.

3. Keys specified in green colour are applicable for only 'Invoice Update API'

4. If key 'action' is specified as 'save', then Invoice will be saved in 'Draft' status

5. If key 'action' is specified as 'approve', then Invoice will be approved

6. Payment details can be updated while updating the details of draft Invoice or while approving the Invoice for first time

7. Payment details will not updated while updating the details of already approved Invoice i.e Key 'payments' will be ignored while updating the approved Invoice

8. If 'inventory_id' is not specified, then new stock will be created for specified 'product_id'

9. In 'Invoice Update API', if 'release_excess_payment' is specified as 'true', then excess payment associated with Invoice will be released and will be available as 'Unused Payment' in respective Receipt

10. 'patient_id' refers unique identifier of the Patient

11. 'facility_id' refers unique identifier of the Facility

12. 'product_id' refers unique identifier of the Product

13. 'inventory_id' refers unique identifier of the Stock of the Product

14. 'code_id' refers unique identifier of the 'Procedure Code'

15. 'consultation_id' refers unique identifier of the Encounter/Chart

16. 'provider_id' refers unique identifier of the 'Practice Member'

17. 'item_id' refers unique identifier of the Item of the Invoice

18. 'insurance_id' refers unique identifier of the 'Patient Insurance'. Applicable for Insurance enabled US Practices

19. If "apply_patient_credit" is not specified and "Auto-apply 'Adjust the available patient credits against the invoice' while invoicing" setting is enabled for practice, then available Credit will be used automatically for the Invoice.

20. If "used_credit_amount" is not specified, then available Credit (up to "Invoice Amount") will be used

2. API to update Invoice

<u>Request</u>

URL : https://ehr.charmtracker.com/api/ehr/v1/invoices/<invoice_id>

Method : PUT

<u>Parameter:</u>

{invoice_id} - Unique identifier of the Invoice

<u>Sample JSON Input Spec for update Invoice API</u>

```
{
        "action": "approve",
        "facility_id": "100000000000000179",
        "patient_id": "100000000000002027",
        "patient_full_name": "Ajay Kumar",
        "invoice_date": "2020-05-30",
        "invoice_type": "Invoice | Credit Note",
        "invoice_subtype": "Procedure Invoice | Product Invoice | Lab Invoice | Collective
        Invoice"
        "provider_id": "10000000000067384",
        "provider_name": "Dr. John Peter",
        "invoice_terms": "Products once sold cannot be taken back after 7 days",
        "invoice_notes": "Take medicines at time as prescribed by the physician",
        "consultation_id": "10000000000034636",
        "insurance_id": "100000000000002821",
        "member_id": "10000000000067358", [For external API calls only]
        "pricing_profile_id": "10000000000067385",
        "release_excess_payment": "false | true",

        "procedures":
                [
                        {
                        "item_id": "100000000000011007",
                        "item_charge": "210.0",
```

```
                    "item_quantity": "1",
                    "code_id": "100000000000011007",
                    "discount_percentage": "10.0",
                    "discount_amount": "10.0",
                    "tax_name": "Service Tax",
                    "tax_percentage": "10.00",
                    "tax_name_2": "Value Added Tax",
                    "tax_percentage_2": "10.00",
                    "modifier_1":"25",
                    "modifier_2":"FH",
                    "modifier_3":"",
                    "modifier_4":"",
                    "place_of_service":"11",
                    "related_diagnosis_ids": "100000000000083738, 100000000000097382"
                }
        ],
    "products":
            [
                {
                        "item_id": "100000000000011003",
                        "item_charge": "11",
                        "item_quantity": "2",
                        "product_id": "100000000000011083",
                        "inventory_id": "100000000000873672",
                        "cost_price": "10",
                        "discount_percentage": "10.0",
                        "discount_amount": "2.0",
                        "tax_name": "Sales Tax",
                        "tax_percentage": "10.00",
                        "tax_name_2": "Value Added Tax",
                        "tax_percentage_2": "10.00",
                        }
            ],
```

"labs":

  [

    {

    "item_id": "100000000000011007",

    "item_charge": "210.0",

    "item_quantity": "1",

    "code_id": "100000000000011007",

    "discount_percentage": "10.0",

    "discount_amount": "10.0",

    "tax_name": "Service Tax",

    "tax_percentage": "10.00",

    "tax_name_2": "Value Added Tax",

    "tax_percentage_2": "10.00",

    "modifier_1":"25",

    "modifier_2":"FH",

    "modifier_3":"",

    "modifier_4":"",

    "place_of_service":"11",

    "related_diagnosis_ids": "100000000000083738, 100000000000097382"

    }

  ]

}

Notes for Update Invoice API:

1. Keys specified in blue colour are optional
2. Keys specified in blue colour and *italic font* are applicable for Insurance enabled Practices. As of now, Insurance is supported for Practices operating in USA.
3. Keys specified in green colour are applicable for only 'Invoice Update API'
4. If key 'action' is specified as 'save', then Invoice will be saved in 'Draft' status
5. If key 'action' is specified as 'approve', then Invoice will be approved
6. Payment details can be updated while updating the details of draft Invoice or while approving the Invoice for first time
7. Payment details will not updated while updating the details of already approved Invoice i.e Key 'payments' will be ignored while updating the approved Invoice
8. If 'inventory_id' is not specified, then new stock will be created for specified 'product_id'
9. In 'Invoice Update API', if 'release_excess_payment' is specified as 'true', then excess payment associated with Invoice will be released and will be available as 'Unused Payment' in respective Receipt
10. 'patient_id' refers unique identifier of the Patient
11. 'facility_id' refers unique identifier of the Facility
12. 'product_id' refers unique identifier of the Product
13. 'inventory_id' refers unique identifier of the Stock of the Product
14. 'code_id' refers unique identifier of the 'Procedure Code'
15. 'consultation_id' refers unique identifier of the Encounter/Chart
16. 'provider_id' refers unique identifier of the 'Practice Member'
17. 'item_id' refers unique identifier of the Item of the Invoice
18. 'insurance_id' refers unique identifier of the 'Patient Insurance'. Applicable for Insurance enabled US Practices
19. If "apply_patient_credit" is not specified and "Auto-apply 'Adjust the available patient credits against the invoice' while invoicing" setting is enabled for practice, then available Credit will be used automatically for the Invoice.
20. If "used_credit_amount" is not specified, then available Credit (up to "Invoice Amount") will be used

3. API to cancel an Invoice

<u>Request</u>

URL : https://ehr.charmtracker.com/api/ehr/v1/invoices/<invoice_id>/cancel

Method : PUT

Sample JSON Input Spec

```
{
        "cancel_comments": "test cancel comments"
}
```

4. API to delete draft Invoice

<u>Request</u>

URL : https://ehr.charmtracker.com/api/ehr/v1/invoices/<invoice_id>

Method : DELETE

5. API to delete Credit Note

<u>Request</u>

URL : https://ehr.charmtracker.com/api/ehr/v1/creditnote/<credit_note_id>

Method : DELETE

6. API to fetch details of an Invoice

Request

URL : https://ehr.charmtracker.com/api/ehr/v1/invoices/<invoice_id>

Method : GET

Parameter Details

Name	Value	Description
invoice_id	Number with maximum length of 19	It is a mandatory parameter

Details

This API will fetch details of an invoice along with procedures, products, applied payments, write-offs, patient and facility details in JSON format. The fields shown in blue color in the below response are optional. Optional fields will become part of the response only when its corresponding value is available.

Sample Response

```
{
            "code": 0,
            "message": "success",
            "invoice": {
                        "invoice_id": "100000000000011001",
                        "invoice_number": "INV6",
                        "invoice_type": "Invoice|Credit Note",
                        "invoice_date": "2020-05-30",
                        "invoice_added_date": "2020-05-30",
                        "invoice_updated_date": "2020-05-30",
                        "invoice_amount": "262.0",
                        "invoice_status": "Paid | Partially Paid | Unpaid | Canceled",
                        "invoice_generated_by": "Dr. Steven Antonio",
```

                    "is_available_credit_used": "false | true",

                    "total_payment_amount": "230.0",

                    "total_invoice_payment_amount": "230.0",

                    "total_writeoff_amount": "22.0",

                    "total_adjustment_amount": "10.0",

                    "invoice_due": "0.0",

                    "invoice_provider_name": "Dr. Steven Antonio",

                    "invoice_provider_id": "100000000000011983",

                    "invoice_terms": "Products once sold cannot be taken back",

                    "invoice_notes": "Take medicines at time as prescribed",

                    "encounter_date":"2014-12-12",

                    "encounter_id":"100000000000005905",

                    "insurance_id":"100000000000009379",

                    "pricing_profile_id":"100000000000009682",

            "patient_details": {

                            "patient_id": "100000000000002027",

                            "patient_first_name": "Anand Kumar",

                            "patient_middle_name": "",

                            "patient_last_name": "Arulmurugan",

                            "patient_full_name": "Anand Kumar Arulmurugan",

                            "patient_record_id": "cha0001",

                            "patient_gender": "male | female",

                            "patient_dob": "1988-07-02",

                            "address_details": {

                                    "address_line_1": "F2, Neo Street",

                                    "address_line_2": "Central Park",

                                    "city": "Montgomery",

                                    "state": "Alabama",

                                    "country": "us",

                                    "zip_code": "614616-9102"

                            }

                    },

            "facility_details": {

                    "facility_id": "100000000000000179",

                    "facility_name": "charmadmin",

                    "facility_code": "charm"

            },

    "insurance_details": {

                    "insurance_id": "100000000000002917",

                    "insurance_name": "MEDICAID",

                    "insurance_number": "66778899",

                    "insurance_type": "MEDICAID",

                    "payer_name": "Medicaid of Alabama",

                    "payer_id": "ALMCD"

            },

    "procedures": [

                    {

                    "item_id": "100000000000011007",

                    "item_name": "Level 3 - New Patient Office Visit",

                    "item_type": "Procedure" ,

                    "item_charge": "210.0",

                    "item_quantity": "1",

                    "code_id": "100000000000011058",

                    "code_number": "99203",

                    "discount_amount": "10.0",

                    "tax_name": "Service Tax",

                    "tax_percentage": "20.0",

                    "tax_amount": "40.0",

                    "tax_name_2": "Value Added Tax",

                    "tax_percentage_2": "10.0",

                    "tax_amount_2": "20.0",

                    "item_total": "260.0"

                    }

            ],

    "products": [

                    {

            "item_id": "100000000000011003",

            "item_name": "Cholecalciferol 0.0712 mg tablet",

            "item_type": "Inventory",

            "item_charge": "11",

            "item_quantity": "2",

            "product_id": "100000000000011083",

            "inventory_id": "100000000000857293",

            "category_name": "Support",

            "batch_number": "SKU #19",

            "product_id_display": "PRO8956",

            "cost_price": "10.50",

            "expiry_date": "2016-11-23",

            "discount_amount": "2.0",

            "tax_name": "Sales Tax",

            "tax_percentage": "10.0",

            "tax_amount": "2.0",

            "tax_name_2": "Additional Sales Tax",

            "tax_percentage_2": "10.0",

            "tax_amount_2": "2.0",

            "item_total": "24"

        }

    ],

    "payments": [

        {

        "transaction_id": "100000000000065009",

        "payment_id ": "1000000000000110793",

        "payment_amount": "200.0",

        "payment_to": "Invoice | Claim",

        "payment_added_date": "2014-12-12",

        "payment_updated_date": "2014-12-12",

        "receipt_number": "15",

        "receipt_date": "2014-12-12",

        "receipt_id": "100000000000011053",

"receipt_amount": "200.0",

"payment_method": "Cash",

"is_patient_payment": "true | false",

"is_deleted": "false",

"reference_payment_id": "",

"reference_number": "receipt reference number",

"check_number": "check reference number",

"item_payments":[

    {

    "item_id":"100000000000011007",

    "item_payment_amount":"200.00"

    }

  ]

},

{

"transaction_id": "100000000000063215",

"payment_id": "1000000000000110084",

"payment_amount": "22.00",

"payment_to": "Invoice",

"payment_added_date": "2014-12-12",

"payment_updated_date": "2014-12-12",

"receipt_number": "16",

"receipt_date": "2014-12-12",

"receipt_id": "100000000000011065",

"receipt_amount": "150.00",

"payment_method": "Check",

"is_patient_payment": "true | false",

"is_deleted": "false",

"reference_payment_id": "",

"reference_number": ""receipt reference number",

"check_number": "check reference number"

"applied_invoice_number": ""INV234",

"item_payments":[

```json
                                    {
                                        "item_id":"100000000000011003",
                                        "item_payment_amount":"22.00"
                                    }
                                ]
                        }
        ],
        "writeoff": [
                        {
                        "transaction_id": "100000000000065009",
                        "writeoff_id": "100000000000011035",
                        "writeoff_amount": "20.00",
                        "writeoff_date": "2014-12-12",
                        "writeoff_added_date": "2014-12-12",
                        "writeoff_updated_date": "2014-12-12",
                        "writeoff_type": "Contractual",
                        "writeoff_comments": "",
                        "is_patient_writeoff": "true | false",
                        "writeoff_applied_to": "Invoice | Claim",
                        "item_writeoffs":[
                                        {
                                        "item_id":"100000000000011007",
                                        "item_writeoff_amount":"20.00",
                                        "item_writeoff_type":"Contractual"
                                        }
                                ]
                        }
            ],
        "adjustments": [
                        {
                        "transaction_id": "100000000000065009",
                        "adjustment_id": "100000000000011358",
                        "adjustment_amount": "10.00",
```

"adjustment_date": "2014-12-12",

"adjustment_added_date": "2014-12-12",

"adjustment_updated_date": "2014-12-12",

"adjustment_type": "Withhold Amount",

"is_patient_adjustment": "true | false",

"adjustment_applied_to": "Invoice | Claim",

"item_adjustments":[

        {

        "item_id":"100000000000011007",

        "item_adjustment_amount":"10.00",

        "item_adjustment_type":"Contractual Obligation"

        }

]

}

] ,

"patient_responsibility": [

        {

        "transaction_id": "100000000000065009",

        "pat_res_id": "100000000000011358",

        "pat_res_amount": "10.00",

        "pat_res_type": "Copay",

        "pat_res_comments": "comments",

        "is_rcm_pat_res": "true | false",

        "item_patient_responsibility":[

                {

                "item_id":"100000000000011007",

                "item_pat_res_amount_1":"5.00",

                "item_pat_res_type_1":"Copay",

                "item_pat_res_amount_2":"5.00",

                "item_pat_res_type_2":"Deductible",

                "item_pat_res_comments": "comments",

                }

                ]

```
                                    }
                        ]
            }
}
```

7. API to get details of Invoice(s) for an Encounter

Request

URL : https://ehr.charmtracker.com/api/ehr/v1/encounter/<encounter_id>/invoices

Method : GET

Scope : *charmhealth.patient.invoice.READ*

Parameter Details

Name	Value	Description
encounter_id	Number with maximum length of 19	It is a mandatory parameter

Details

This API will fetch details of Invoices created for the given Encounter

Sample Response

```
{
        "code": 0,
        "message": "success",
        "invoices": [
                        {
                        "invoice_id": "100000000000011001",
                        "invoice_number": "INV6",
                        "invoice_type": "Invoice|Credit Note",
                        "invoice_date": "2020-05-30",
                        "invoice_added_date": "2020-05-30",
                        "invoice_updated_date": "2020-05-30",
```

"invoice_amount": "262.0",

"invoice_status": "Paid | Partially Paid | Unpaid | Canceled",

"invoice_generated_by": "Dr. Steven Antonio",

"is_available_credit_used": "false | true",

"total_payment_amount": "230.0",

"total_invoice_payment_amount": "230.0",

"total_writeoff_amount": "22.0",

"total_adjustment_amount": "10.0",

"invoice_due": "0.0",

"invoice_provider_name": "Dr. Steven Antonio",

"invoice_provider_id": "100000000000011983",

"invoice_terms": "Products once sold cannot be taken back",

"invoice_notes": "Take medicines at time as prescribed",

"encounter_date":"2014-12-12",

"encounter_id":"100000000000005905",

"insurance_id":"100000000000009379",

"pricing_profile_id":"100000000000009682",

"patient_details": {

                "patient_id": "100000000000002027",

                "patient_first_name": "Anand Kumar",

                "patient_middle_name": "",

                "patient_last_name": "Arulmurugan",

                "patient_full_name": "Anand Kumar Arulmurugan",

                "patient_record_id": "cha0001",

                "patient_gender": "male | female",

                "patient_dob": "1988-07-02",

                "address_details": {

                                "address_line_1": "F2, Neo Street",

                                "address_line_2": "Central Park",

                                "city": "Montgomery",

                                "state": "Alabama",

                                "country": "us",

                                "zip_code": "614616-9102"

```
                }
            },
    "facility_details": {
                "facility_id": "100000000000000179",
                "facility_name": "charmadmin",
                "facility_code": "charm"
            },
"insurance_details": {
                "insurance_id": "100000000000002917",
                "insurance_name": "MEDICAID",
                "insurance_number": "66778899",
                "insurance_type": "MEDICAID",
                "payer_name": "Medicaid of Alabama",
                "payer_id": "ALMCD"
            },
    "procedures": [
                    {
                    "item_id": "100000000000011007",
                    "item_name": "Level 3 - New Patient Office Visit",
                    "item_type": "Procedure" ,
                    "item_charge": "210.0",
                    "item_quantity": "1",
                    "code_id": "100000000000011058",
                    "code_number": "99203",
                    "discount_amount": "10.0",
                    "tax_name": "Service Tax",
                    "tax_percentage": "20.0",
                    "tax_amount": "40.0",
                    "tax_name_2": "Value Added Tax",
                    "tax_percentage_2": "10.0",
                    "tax_amount_2": "20.0",
                    "item_total": "260.0"
                    }
```

                ],
        "products": [

                {
                "item_id": "100000000000011003",
                "item_name": "Cholecalciferol 0.0712 mg tablet",
                "item_type": "Inventory",
                "item_charge": "11",
                "item_quantity": "2",
                "product_id": "100000000000011083",
                "inventory_id": "100000000000857293",
                "category_name": "Support",
                "batch_number": "SKU #19",
                "product_id_display": "PRO8956",
                "cost_price": "10.50",
                "expiry_date": "2016-11-23",
                "discount_amount": "2.0",
                "tax_name": "Sales Tax",
                "tax_percentage": "10.0",
                "tax_amount": "2.0",
                "tax_name_2": "Additional Sales Tax",
                "tax_percentage_2": "10.0",
                "tax_amount_2": "2.0",
                "item_total": "24"
                }
        ],
        "payments": [

                {
                "transaction_id": "100000000000065009",
                "payment_id ": "100000000000110793",
                "payment_amount": "200.0",
                "payment_to": "Invoice | Claim",
                "payment_added_date": "2014-12-12",
                "payment_updated_date": "2014-12-12",

"receipt_number": "15",

"receipt_date": "2014-12-12",

"receipt_id": "100000000000011053",

"receipt_amount": "200.0",

"payment_method": "Cash",

"is_patient_payment": "true | false",

"is_deleted": "false",

"reference_payment_id": "",

"reference_number": "receipt reference number",

"check_number": "check reference number",

"item_payments":[

                {

                "item_id":"100000000000011007",

                "item_payment_amount":"200.00"

                }

        ]

},

{

"transaction_id": "100000000000063215",

"payment_id": "1000000000000110084",

"payment_amount": "22.00",

"payment_to": "Invoice",

"payment_added_date": "2014-12-12",

"payment_updated_date": "2014-12-12",

"receipt_number": "16",

"receipt_date": "2014-12-12",

"receipt_id": "100000000000011065",

"receipt_amount": "150.00",

"payment_method": "Check",

"is_patient_payment": "true | false",

"is_deleted": "false",

"reference_payment_id": "",

"reference_number": ""receipt reference number",

```json
                        "check_number": "check reference number"
                        "applied_invoice_number": ""INV234",
                    "item_payments":[
                                {
                                "item_id":"100000000000011003",
                                "item_payment_amount":"22.00"
                                }
                        ]
                    }
            ],
    "writeoff": [
                {
                "transaction_id": "100000000000065009",
                "writeoff_id": "100000000000011035",
                "writeoff_amount": "20.00",
                "writeoff_date": "2014-12-12",
                "writeoff_added_date": "2014-12-12",
                "writeoff_updated_date": "2014-12-12",
                "writeoff_type": "Contractual",
                "writeoff_comments": "",
                "is_patient_writeoff": "true | false",
                "writeoff_applied_to": "Invoice | Claim",
                "item_writeoffs":[
                                {
                                "item_id":"100000000000011007",
                                "item_writeoff_amount":"20.00",
                                "item_writeoff_type":"Contractual"
                                }
                        ]
                }
            ],
    "adjustments": [
```

```
            {
                "transaction_id": "100000000000065009",
                "adjustment_id": "100000000000011358",
                "adjustment_amount": "10.00",
                "adjustment_date": "2014-12-12",
                "adjustment_added_date": "2014-12-12",
                "adjustment_updated_date": "2014-12-12",
                "adjustment_type": "Withhold Amount",
                "is_patient_adjustment": "true | false",
                "adjustment_applied_to": "Invoice | Claim",
                "item_adjustments":[
                                {
                                    "item_id":"100000000000011007",
                                    "item_adjustment_amount":"10.00",
                                    "item_adjustment_type":"Contractual
                    Obligation (CO)"
                                }
                        ]
                }
        ] ,
    "patient_responsibility": [
                    {
                    "transaction_id": "100000000000065009",
                    "pat_res_id": "100000000000011358",
                    "pat_res_amount": "10.00",
                    "pat_res_type": "Copay",
                    "pat_res_comments": "comments",
                    "is_rcm_pat_res": "true | false",
                    "item_patient_responsibility":[
                            {
                            "item_id":"100000000000011007",
                            "item_pat_res_amount_1":"5.00",
                            "item_pat_res_type_1":"Copay",
```

"item_pat_res_amount_2":"5.00",

"item_pat_res_type_2":"Deductible",

"item_pat_res_comments": "comments",

}
                        ]
                        }
                    ]
        },
            {...2nd invoice details if available...}
        ]
}

8. API to get Invoice PDF

URL :
https://ehr.charmtracker.com/api/ehr/v1/billing/invoice/{invoice_id}/download?file_type=INVOI
CE_PDF
Method : GET

Parameters:
invoice_id - Unique identifier of Invoice in ChARM

9. API to apply payment, write-off and adjustment to items of an Invoice

Request

URL : https://ehr.charmtracker.com/api/ehr/v1/invoices/{invoice_id}/transactions

Method : POST

Parameter:

{invoice_id} - Unique identifier of the invoice

Sample JSON Input format for adding/updating a transaction

```
{
        "invoice_id":"100000000000005059",
        "is_patient_payment":"true",
        "receipt_date":"2015-05-11",
        "facility_id":"100000000000007562",
        "patient_id":"100000000000008624",
        "provider_id" : "100000000000005644",
        "receipt_amount":"100.00",
        "payment_method":"Cash",
        "reference_number":"1234567890",
        "check_number":"Check1234567890",
        "description":" test description for payment",
        "payment_amount":"100.00",
        "adjustment_amount":"2.00",
        "adjustment_type":"Payer Adjustment",
        "writeoff_amount":"10.00",
        "writeoff_type":"Bad debt",
        "pat_res_amount":"5.00",
        "pat_res_type":"Others",
        "transaction_comments":"test comments",

        "items": [
                {
```

"item_id":"100000000000005061",

"item_payment_amount":"15.00",

"item_adjustment_amount":"2.00",

"item_adjustment_type":"Payer Adjustment",

"item_writeoff_amount":"3.00",

"item_writeoff_type":"Bad debt",

"item_pat_res_amount_1":"5.00",

"item_pat_res_type_1":"Others",

"item_pat_res_amount_2":"5.00",

"item_pat_res_type_2":"Others",

"is_item_denied":"true|false",

"item_comments":"test comments"

},

{

"item_id":"100000000000000973",

"item_payment_amount":"20.00",

"item_adjustment_amount":"0.00",

"item_adjustment_type":"Payer Adjustment",

"item_writeoff_amount":"10.00",

"item_writeoff_type":"Bad debt",

"item_pat_res_amount_1":"5.00",

"item_pat_res_type_1":"Others",

"item_pat_res_amount_2":"5.00",

"item_pat_res_type_2":"Others",

"is_item_denied":"true|false",

"item_comments":"test comments"

}

]

}

Notes:

- Keys in blue colour are optional
- receipt_date and payment_method are mandatory when receipt_amount is given
- receipt_date should be in proper format of yyyy-mm-dd
- is_patient_payment can be true or false
- sum of payment_amount of all items cannot be greater than receipt_amount
- sum of payment_amount, writeoff_amount and adjustment_amount cannot be greater than item_due
- sum of total_payment_amount, total_writeoff_amount and total_adjustment_amount cannot be greater than invoice_due
- writeoff_amount / adjustment_amount / patient_res_amount cannot be given without their respective types

10. API to update payment, write-off and adjustment to items of an Invoice

Request

URL : https://ehr.charmtracker.com/api/ehr/v1/invoices/{invoice_id}/transactions/{transaction_id}

Method : PUT

Parameter:

{invoice_id} - Unique identifier of the Invoice

{transaction_id} - Unique identifier of the Transaction

Sample JSON Input format for adding/updating a transaction

```
{
        "invoice_id":"100000000000005059",
        "is_patient_payment":"true",
        "receipt_date":"2015-05-11",
        "facility_id":"100000000000007562",
        "patient_id":"100000000000008624",
        "provider_id" : "100000000000005644",
        "receipt_amount":"100.00",
        "payment_method":"Cash",
        "reference_number":"1234567890",
        "check_number":"Check1234567890",
        "description":" test description for payment",
        "payment_amount":"100.00",
        "adjustment_amount":"2.00",
        "adjustment_type":"Payer Adjustment",
        "writeoff_amount":"10.00",
        "writeoff_type":"Bad debt",
        "pat_res_amount":"5.00",
        "pat_res_type":"Others",
        "transaction_comments":"test comments",

        "items": [
```

```
                {
                "item_id":"100000000000005061",
                "item_payment_amount":"15.00",
                "item_adjustment_amount":"2.00",
                "item_adjustment_type":"Payer Adjustment",
                "item_writeoff_amount":"3.00",
                "item_writeoff_type":"Bad debt",
                "item_pat_res_amount_1":"5.00",
                "item_pat_res_type_1":"Others",
                "item_pat_res_amount_2":"5.00",
                "item_pat_res_type_2":"Others",
                "is_item_denied":"true|false",
                "item_comments":"test comments"
                },
                {
                "item_id":"100000000000000973",
                "item_payment_amount":"20.00",
                "item_adjustment_amount":"0.00",
                "item_adjustment_type":"Payer Adjustment",
                "item_writeoff_amount":"10.00",
                "item_writeoff_type":"Bad debt",
                "item_pat_res_amount_1":"5.00",
                "item_pat_res_type_1":"Others",
                "item_pat_res_amount_2":"5.00",
                "item_pat_res_type_2":"Others",
                "is_item_denied":"true|false",
                "item_comments":"test comments"
                }
            ]
        }
```

Notes:

- Keys in blue colour are optional
- receipt_date and payment_method are mandatory when receipt_amount is given
- receipt_date should be in proper format of yyyy-mm-dd
- is_patient_payment can be true or false
- sum of payment_amount of all items cannot be greater than receipt_amount
- sum of payment_amount, writeoff_amount and adjustment_amount cannot be greater than item_due
- sum of total_payment_amount, total_writeoff_amount and total_adjustment_amount cannot be greater than invoice_due
- writeoff_amount / adjustment_amount / patient_res_amount cannot be given without their respective types

11. Invoices List API

Request

URL :

https://ehr.charmtracker.com/api/ehr/v1/invoices?facility_id=<facility_value>&patient_id=<patient_id_value>

Method : GET

Parameter Details

Parameter Name	Parameter Value	Example	Description
facility_id	Number with maximum length of 19	If facility_id is not given, Invoices are fetched across facilities	It is a non-mandatory parameter
patient_id	Number with maximum length of 19	If patient_id is not given, Invoices of all patients are fetched	It is a non-mandatory parameter
invoice_number	String	Refers to "Invoice Display ID" in ChARM.	It is a non-mandatory parameter
invoice_type	Invoice (or) Credit Note	If invoice_type is not given, both Invoices and Credit Notes are fetched	It is a non-mandatory parameter
date_name	invoice_date (or) invoice_added_date (or) invoice_updated_date	Invoices are fetched based on this date	It is a non-mandatory parameter. Default value is **invoice_date**.
from_date	yyyy-mm-dd (or) yyyy-mm-dd hh:mm:ss	2015-01-10 2015-01-10 20:30:40	It is a mandatory parameter
to_date	yyyy-mm-dd (or) yyyy-mm-dd hh:mm:ss	2015-01-10 2015-01-10 20:30:40	It is a mandatory parameter
start_index	Number	Invoices are fetched from this index	It is a non-mandatory parameter. Default value

			is 1
count	Number	Number of Invoices to be fetched	It is a non-mandatory parameter. Default value is 100
is_ascending	Boolean	If it is true, Invoices are fetched in ascending order for given date_name	It is a non-mandatory parameter. Default value is true
invoice_status	Paid (or) Partially Paid (or) Unpaid (or) Outstanding (or) All (or) Draft (or) All_With_Draft_Invoices	If it is given, only Invoices with that status will be fetched	It is a non-mandatory parameter. Default value is All

Parameter Value	Description
invoice_date	Refers the date chosen by the user for Invoice i.e 'Invoice Date'
invoice_added_date	Refers the first approved date of Invoice i.e 'Invoice Added Date'
invoice_updated_date	Refers the latest updated date of Invoice i.e 'Invoice Updated Date'. The operations such as 'Add/Edit Payment', 'Add/Edit Write-off', 'Edit/Cancel Invoice' and 'Void Payment' are considered as 'Update' for Invoice

Details

- This API will fetch details of Invoices based on specified date_name, from_value, to_value and start_value parameters
- This API will return a maximum of 100 Invoices in single call. This API should be called in loop with respective value for the parameter **start_index** to get all Invoices for the given criteria. And loop should terminate when Invoices count is less than 100
- For 1st API call, value for the parameter **start_index** should be 1. For 2nd API call, it should be 101 and so on

Sample Response Format:

```
{
            "code": 0,
      "message": "success",
      "invoices": [
            {...1st invoice...},
            {...2nd invoice...},
            ...
            {...nth invoice...}
      ]
}
```

Sample Response:

```
{
            "code": 0,
            "message": "success",
            "invoices": [
                              {
                        "invoice_id": "100000000000011001",
                        "invoice_number": "INV6",
                        "invoice_type": "Invoice|Credit Note",
                        "invoice_date": "2020-05-30",
                        "invoice_added_date": "2020-05-30",
                        "invoice_updated_date": "2020-05-30",
                        "invoice_amount": "262.0",
                        "invoice_status": "Paid | Partially Paid | Unpaid | Canceled",
                        "invoice_generated_by": "Dr. Steven Antonio",
                        "is_available_credit_used": "false | true",
                        "total_payment_amount": "230.0",
                        "total_invoice_payment_amount": "230.0",
                        "total_writeoff_amount": "22.0",
```

"total_adjustment_amount": "10.0",

"invoice_due": "0.0",

"invoice_provider_name": "Dr. Steven Antonio",

"invoice_provider_id": "100000000000011983",

"invoice_terms": "Products once sold cannot be taken back",

"invoice_notes": "Take medicines at time as prescribed",

"encounter_date":"2014-12-12",

"encounter_id":"100000000000005905",

"insurance_id":"100000000000009379",

"pricing_profile_id":"100000000000009682",

"patient_details": {

    "patient_id": "100000000000002027",

    "patient_first_name": "Anand Kumar",

    "patient_middle_name": "",

    "patient_last_name": "Arulmurugan",

    "patient_full_name": "Anand Kumar Arulmurugan",

    "patient_record_id": "cha0001",

    "patient_gender": "male | female",

    "patient_dob": "1988-07-02",

    "address_details": {

        "address_line_1": "F2, Neo Street",

        "address_line_2": "Central Park",

        "city": "Montgomery",

        "state": "Alabama",

        "country": "us",

        "zip_code": "614616-9102"

        }

    },

"facility_details": {

    "facility_id": "100000000000000179",

    "facility_name": "charmadmin",

    "facility_code": "charm"

    },

"insurance_details": {

 "insurance_id": "100000000000002917",

 "insurance_name": "MEDICAID",

 "insurance_number": "66778899",

 "insurance_type": "MEDICAID",

 "payer_name": "Medicaid of Alabama",

 "payer_id": "ALMCD"

 },

"procedures": [

 {

 "item_id": "100000000000011007",

 "item_name": "Level 3 - New Patient Office Visit",

 "item_type": "Procedure" ,

 "item_charge": "210.0",

 "item_quantity": "1",

 "code_id": "100000000000011058",

 "code_number": "99203",

 "discount_amount": "10.0",

 "tax_name": "Service Tax",

 "tax_percentage": "20.0",

 "tax_amount": "40.0",

 "tax_name_2": "Value Added Tax",

 "tax_percentage_2": "10.0",

 "tax_amount_2": "20.0",

 "item_total": "260.0"

 }

],

"products": [

 {

 "item_id": "100000000000011003",

 "item_name": "Cholecalciferol 0.0712 mg tablet",

 "item_type": "Inventory",

 "item_charge": "11",

"item_quantity": "2",

"product_id": "100000000000011083",

"inventory_id": "100000000000857293",

"category_name": "Support",

"batch_number": "SKU #19",

"product_id_display": "PRO8956",

"cost_price": "10.50",

"expiry_date": "2016-11-23",

"discount_amount": "2.0",

"tax_name": "Sales Tax",

"tax_percentage": "10.0",

"tax_amount": "2.0",

"tax_name_2": "Additional Sales Tax",

"tax_percentage_2": "10.0",

"tax_amount_2": "2.0",

"item_total": "24"

}

],

"payments": [

{

"transaction_id": "100000000000065009",

"payment_id ": "1000000000000110793",

"payment_amount": "200.0",

"payment_to": "Invoice | Claim",

"payment_added_date": "2014-12-12",

"payment_updated_date": "2014-12-12",

"receipt_number": "15",

"receipt_date": "2014-12-12",

"receipt_id": "100000000000011053",

"receipt_amount": "200.0",

"payment_method": "Cash",

"is_patient_payment": "true | false",

"is_deleted": "false",

"reference_payment_id": "",

"reference_number": "receipt reference number",

"check_number": "check reference number",

"item_payments":[

{

"item_id":"100000000000011007",

"item_payment_amount":"200.00"

}

]

},

{

"transaction_id": "100000000000063215",

"payment_id": "1000000000000110084",

"payment_amount": "22.00",

"payment_to": "Invoice",

"payment_added_date": "2014-12-12",

"payment_updated_date": "2014-12-12",

"receipt_number": "16",

"receipt_date": "2014-12-12",

"receipt_id": "100000000000011065",

"receipt_amount": "150.00",

"payment_method": "Check",

"is_patient_payment": "true | false",

"is_deleted": "false",

"reference_payment_id": "",

"reference_number": ""receipt reference number",

"check_number": "check reference number"

"applied_invoice_number": ""INV234",

"item_payments":[

{

"item_id":"100000000000011003",

"item_payment_amount":"22.00"

```
                    }
                ]
            }
        ],
    "writeoff": [
                {
                "transaction_id": "100000000000065009",
                "writeoff_id": "100000000000011035",
                "writeoff_amount": "20.00",
                "writeoff_date": "2014-12-12",
                "writeoff_added_date": "2014-12-12",
                "writeoff_updated_date": "2014-12-12",
                "writeoff_type": "Contractual",
                "writeoff_comments": "",
                "is_patient_writeoff": "true | false",
                "writeoff_applied_to": "Invoice | Claim",
                "item_writeoffs":[
                            {
                            "item_id":"100000000000011007",
                            "item_writeoff_amount":"20.00",
                            "item_writeoff_type":"Contractual"
                            }
                    ]
                }
        ],
    "adjustments": [
                {
                "transaction_id": "100000000000065009",
                "adjustment_id": "100000000000011358",
                "adjustment_amount": "10.00",
                "adjustment_date": "2014-12-12",
                "adjustment_added_date": "2014-12-12",
                "adjustment_updated_date": "2014-12-12",
```

```
                        "adjustment_type": "Withhold Amount",

                        "is_patient_adjustment": "true | false",

                        "adjustment_applied_to": "Invoice | Claim",

                        "item_adjustments":[

                                {

                                "item_id":"10000000000011007",

                                "item_adjustment_amount":"10.00",

                                "item_adjustment_type":"Contractual

                        Obligation (CO)"

                                }

                        ]

                    }

                ] ,

        "patient_responsibility": [

                    {

                    "transaction_id": "10000000000065009",

                    "pat_res_id": "10000000000011358",

                    "pat_res_amount": "10.00",

                    "pat_res_type": "Copay",

                    "pat_res_comments": "comments",

                    "is_rcm_pat_res": "true | false",

                    "item_patient_responsibility":[

                                {

                            "item_id":"10000000000011007",

                            "item_pat_res_amount_1":"5.00",

                            "item_pat_res_type_1":"Copay",

                            "item_pat_res_amount_2":"5.00",

                            "item_pat_res_type_2":"Deductible",

                            "item_pat_res_comments":

                    "comments",

                                }

                            ]

                    }
```

```
                    ]
            },
            {...2nd invoice...},
            {...3rd invoice...},
            ...
            {...nth invoice...}
        ]
    }
```