**Soarian Schedule Messages to Phreesia**

**Version 1.0**

**Prepared By: Stephen Mattei**

**Date: 5/30/2019**

[Document Control 3](#_Toc14082690)

[Resources: (include Project Team Members, Liaisons, Vendor Contacts, etc.) 3](#_Toc14082691)

[Project Distribution List 3](#_Toc14082692)

[Document Version Control 3](#_Toc14082693)

[1. Introduction 4](#_Toc14082694)

[1.1 Purpose 4](#_Toc14082695)

[1.2 Project Scope 4](#_Toc14082696)

[1.3 Terminology Standards 4](#_Toc14082697)

[1.3.1 Acronyms 4](#_Toc14082698)

[1.3.2 Glossary 4](#_Toc14082699)

[1.4 Document References 4](#_Toc14082700)

[2. Diagram 5](#_Toc14082701)

[3. Requirements 6](#_Toc14082702)

[3.1 Functional Requirements 6](#_Toc14082703)

[3.2 Non-Functional Requirements 6](#_Toc14082704)

[3.3 Messaging Protocols 7](#_Toc14082705)

[3.3.1 Inbound to the BayCare Cloverleaf from Soarian Scheduling 7](#_Toc14082706)

[3.3.2 Outbound from BayCare Cloverleaf to Phreesia 7](#_Toc14082707)

[4. HL7 Messaging 8](#_Toc14082708)

[4.1 Messaging Format 8](#_Toc14082709)

[4.1.1 Segments 8](#_Toc14082710)

[4.1*.*2 Messaging Event Types 8](#_Toc14082711)

[4.1*.*3 Cloverleaf Configuration Files 9](#_Toc14082712)

[4.1.4 Cloverleaf Site Location 9](#_Toc14082713)

[4.2 Data Transformation Requirements 10](#_Toc14082714)

[4.3 Sample Message 11](#_Toc14082715)

[5. Alerts 12](#_Toc14082716)

[Appendix A: Risks and Concerns 12](#_Toc14082717)

[Appendix B: Issues List 12](#_Toc14082718)

# **Document Control**

## Resources: (include Project Team Members, Liaisons, Vendor Contacts, etc.)

|  |  |  |
| --- | --- | --- |
| **Name** | **Role** | **Email** |
| Kathleen Williams | Project Manager | [Kathleen.Williams@baycare.org](mailto:Kathleen.Williams@baycare.org) |
| Daniel Alicea | IS Product Owner (Manager of Registration Systems) | [Daniel.Alicea@baycare.org](mailto:Daniel.Alicea@baycare.org) |
| Stephen Mattei | IS Enterprise Integration Architect | [Stephen.mattei@baycare.org](mailto:Stephen.mattei@baycare.org) |
| Briana Maffettone | Phreesia Client Services | [bmaffettone@phreesia.com](mailto:bmaffettone@phreesia.com) |
| Allison Gourvitz | Phreesia Product Manager | [agourvitz@phreesia.com](mailto:agourvitz@phreesia.com) |
| Sara DiNardo | Phreesia Director of Client Services \ PM | [sdinardo@phreesia.com](mailto:sdinardo@phreesia.com) |
|  |  |  |
|  |  |  |

## Project Distribution List

## Document Version Control

|  |  |  |  |
| --- | --- | --- | --- |
| **Version** | **Date** | **Modifier** | **Description** |
| V1.0 | 5/30/2019 | Stephen Mattei | Originally Created |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

# 1. Introduction

## 1.1 Purpose

This document defines the record structure and business logic deployed to integrate Soarian scheduling to Phreesia. This document is to be used a reference source.

## 1.2 Project Scope

Soarian is sending scheduling data Phreesia to so it can facilitate the pre-registration and patient input process. The patients can either check in from home to complete forms and update basic demographics or at the point of care using the Phreesia tablet.

## 1.3 Terminology Standards

### 1.3.1 Acronyms

Define the acronyms and their associated definitions used in this document. The acronyms should be listed in alphabetical order.

### 1.3.2 Glossary

List the terms that require definition with respect to Cloverleaf and the product whose requirements are defined in this document. The definitions are specific to this document and may not be identical to the definitions of these terms in common use.

## 1.4 Document References

List all documents or Web addresses to which this IDBB refers; provide enough information so that the reader can access a copy of each reference. Include the title, author, version number, date, and source or location.

# 2. Diagram

Solution diagram not created due to simple nature of integration.



# 3. Requirements

## 3.1 Functional Requirements

Provide detail for the below functional requirements. The message transformation requirements for the components defined in this specification should be specified in section 4.2 of this document.

|  |  |  |
| --- | --- | --- |
| **Cloverleaf** |  |  |
| **Number** | **Requirement Name** | **Requirement Description** |
| FR.2019.1.0 | Filter unwanted schedule types | Phreesia did not way to received schedules with a type of: SCHEDINTFCAPPTATTEND or SCHEDINTFCREVISEATTNDR in SCH:5 |
| FR.2019.2.0 | Do not send most behavioral health facility schedules | If the sending facility, MSH:4, is equal to: UBJ5, HBJ5, SBJ5, IBJ5, CBJ5 or BBJ5 do not send. |
| FR.2019.3.0 | Allow PCP behavioral health locations | If PV1:39 is: {BCBH PCBARD} {BCBH PCPCM} {BCBH PCPCW} {BCBH PCPSA} {BCBH PCBLOOM} {BCBH PCPGH} {BCBH TRINITY} {BCLM PCP MLK} {BCBH PCPCFC}, allow to cross to Phreesia. These are collocated behavioral health professionals in PCP offices. |
| FR.2019.4.0 | Remove Quotes | Remove all double quotes from the message because they are sent in error and will remove data from the Phreesia database |
| FR.2019.5.0 | Pad CPI | Pad the CPI to a length of 9. This was done to account for the inconsistencies in Soarian Financials and Scheduling because duplicate patients were being created. |

## 3.2 Non-Functional Requirements

Provide concise detail for the below non-functional requirements. This would include external table ownership, hours of support, etc. The below requirements must be evaluated for every project.

|  |  |  |
| --- | --- | --- |
| **Cloverleaf** |  |  |
| **Number** | **Requirement Name** | **Requirement Description** |
| NFR.20XX.1.0 | Click here to enter text. | Click here to enter text. |

## 3.3 Messaging Protocols

Below are listed the details for the messaging protocols that will be leveraged for this integration. This includes: TCP/IP, FTP, Web Services, etc.

### 3.3.1 Inbound to the BayCare Cloverleaf from Soarian Scheduling

|  |  |
| --- | --- |
| FTP |  |
| MLLP Socket Connection (TCP/IP) |  |
| Local File Drop by Midrange Team |  |
| Other | Click here to enter text. |

### 3.3.2 Outbound from BayCare Cloverleaf to Phreesia

|  |  |
| --- | --- |
| FTP |  |
| MLLP Socket Connection (TCP/IP) |  |
| Local File Drop by Midrange Team |  |
| Other | Click here to enter text. |

|  |  |
| --- | --- |
| Other | Click here to enter text. |

# 4. HL7 Messaging

## 4.1 Messaging Format

### 4.1.1 Segments

The segments utilized for this interface are:

MSH

SCH

PID

[PV1]

[PV2]

[DG1]

AIS

[{NTE]}

[AIL]

AIG

{[ZAD]}

*Message Construction Notes:*

*[Square Brackets] – Optional*

*{Curly Brackets} – Repeatable*

*MSH – Message Header*

*SCH – Schedule Activity Information segment*

*PID – Patient ID segment*

*PV1 – Patient Visit segment*

*AIS – Service Segment segment*

*AIG – General Resource segment*

*AIL – Location Resource segment*

*AIP – Personnel Resource segment*

### 4.1*.*2 Messaging Event Types

Below are the messages types necessary for this integration

|  |  |
| --- | --- |
| **Event Type** | **Description** |
| S12 | New Appointment |
| S13 | Reschedule |
| S14 | Modification |
| S15 | Cancellation |

### 4.1*.*3 Cloverleaf Configuration Files

tpsAdvHl7Filter.tcl

Tps\_soars\_phreesia\_siu.tcl

### 4.1.4 Cloverleaf Site Location

phreesia\_33\_p

## 4.2 Data Transformation Requirements

| **Field Description** | **HL7 Field Loc.** | **Required Y/N** | **Notes** |
| --- | --- | --- | --- |
| Appointment Type | SCH:8 | Y | This field is mapped from the from AIS:3, Universal Service Identifier. |
|  | SCH\* | N/A | All other fields in the SCH are sent without modification |
| Patient IDs | PID:3 | Y | Pull the CPI by using the assigning authority 90000 and ensure that it is length of 9. If it is not a length of 9 pad the CPI to a length of 9 by adding zeros. |
|  | PID\* | N/A | All other fields in the PID are sent without modification |
| \* | \* | N/A | All other segments are sent without modification |

## 4.3 Sample Message

MSH|^~\&|SOARIAN^SCHEDULING|M0J5|CLOVERLF|M0J5|201907151030||SIU^S12||P|2.4

SCH||5901026|||SCHEDNEW\_ACK||^stomache pain/additional monitoring/suspicious lump|PZINJ^PET Injection|60|MIN||063373^GEORGE^AJU||||^Celli, Kim B.^^03337||||^Celli, Kim B.^^03337|||||^^^

PID|1||810120444^^^900000^PI^^^^^||TEST^TEST^^^^||19010101|M|||123 FAKE ST^^New York^NY^10001^USA^^||(813)555-1234^C^^NONE~^H||EN|S||6000144905^^^^VCD

PV1||O|||||063373^GEORGE^AJU|000000^UNKNOWN^DOCTOR||PET|||||||063373^GEORGE^AJU|A|5400057792^^^^PN^^^^^||||||||||||||||||||Carlisle Imaging|||||201907150700

PV2|||||||||||||||||||||||Carlisle Imaging

DG1|1|I0|A02.20^^I10|||A|||||||||01

AIS|1|A|PZINJ^PET Injection|201907150700|||60|MIN

NTE|1|||REFAUTH

NTE|1||Caller's Name:^TEST^sch\_user\_30char\_01|QA

NTE|1||Script Delivery^PATIENT^sch\_user\_60char\_03|QA

NTE|1||Does patient have any special needs?^N^sch\_user\_01char\_01|QA

NTE|1||Order Priority^^PRIORITY|QA

NTE|1||5. Is patient an Insulin-dependent diabetic^N^sch\_user\_01char\_02|QA

AIL|1|A|MPCIC^^^^^^^^Carlisle Imaging Center

AIG|1|A|CIPETIN1^MPCIC PET CT Injection Room 1|ROOM||||201907150700|0|MIN|60|MIN||BOOKED

ZAD||PET^PET CT||||0

# 5. Alerts

Are you going to need alerting on this connection?

|  |  |
| --- | --- |
| Yes |  |
| No |  |

If the answer is yes, please complete the table below:

|  |  |  |  |
| --- | --- | --- | --- |
| **Site Name** | **Hours of Support** | **Distribution Group** | **Comments** |
|  |  |  |  |
| Phreesia\_33\_p | 24/7 | IS PHYSICIAN REVENUE CYCLE SYS | Standard queue depth alerts |

# Appendix A: Risks and Concerns

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Name** |  |  | | |  |  |  |  |
| **Number** | **Risk / Concern** | **Comment** | **Mitigation** | | |  |  |  |
| RC.2013.1.0 |  |  | |  | |  |  |  |

# Appendix B: Issues List

This is a dynamic list of the open issues related to the IDBB that remain to be solved, including but not limited to TBDs, pending decisions, information needed, conflict awaiting resolution, and the like.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Project Name** |  |  | | |  |  |  |  |
| **Number** | **Issue** | **Comment** | **Fix** | | |  |  |  |
| I.2013.1.0 |  |  | |  | |  |  |  |

* End of document