**Phreesia XML Coded Comments to Soarian**

**Version 1.0**

**Prepared By: Stephen Mattei**

**Date: 5/30/2019**

[Document Control 3](#_Toc10122525)

[Resources: (include Project Team Members, Liaisons, Vendor Contacts, etc.) 3](#_Toc10122526)

[Project Distribution List 3](#_Toc10122527)

[Document Version Control 3](#_Toc10122528)

[1. Introduction 4](#_Toc10122529)

[1.1 Purpose 4](#_Toc10122530)

[1.2 Project Scope 4](#_Toc10122531)

[1.3 Terminology Standards 4](#_Toc10122532)

[1.3.1 Acronyms 4](#_Toc10122533)

[1.3.2 Glossary 4](#_Toc10122534)

[1.4 Document References 4](#_Toc10122535)

[2. Diagram 5](#_Toc10122536)

[3. Requirements 6](#_Toc10122537)

[3.1 Functional Requirements 6](#_Toc10122538)

[3.2 Non-Functional Requirements 6](#_Toc10122539)

[3.3 Messaging Protocols 7](#_Toc10122540)

[3.3.1 Inbound to the BayCare Cloverleaf from Phreesia 7](#_Toc10122541)

[3.3.2 Outbound from the BayCare Cloverleaf to Soarian 7](#_Toc10122542)

[4. XML Messaging 8](#_Toc10122543)

[4.1 Messaging Format 8](#_Toc10122544)

[4.1*.*2 Messaging Event Types 9](#_Toc10122545)

[4.1*.*3 Cloverleaf Configuration Files 9](#_Toc10122546)

[4.1.4 Cloverleaf Site Location 9](#_Toc10122547)

[4.2 Data Transformation Requirements 9](#_Toc10122548)

[4.3 Sample Message 10](#_Toc10122549)

[5. Alerts 11](#_Toc10122550)

[Appendix A: Risks and Concerns 11](#_Toc10122551)

[Appendix B: Issues List 12](#_Toc10122552)

# **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 Phreesia XML coded comments to Soarian. This document is to be used a reference source.

## 1.2 Project Scope

Phreesia is posting coded comments back to Soarian to disclose that a payment had been made by the patient via the Phreesia website or 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.20XX.1.0 | Click here to enter text. | Click here to enter text. |

## 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 Phreesia

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

### 3.3.2 Outbound from the BayCare Cloverleaf to Soarian

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

|  |  |
| --- | --- |
|  |  |

# 4. XML Messaging

## 4.1 Messaging Format

<commentRequest xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="soarf\_codedComment.xsd">

<source>

<sourceSystemName> </sourceSystemName>

<referenceIdentifier> </referenceIdentifier>

<referenceDate></referenceDate>

<referenceTime></referenceTime>

<referenceUserIdentifier> </referenceUserIdentifier>

</source>

<target>

<identifier></identifier>

<type></type>

</target>

<comment>

<code></code>

<Text></Text>

</comment>

</commentRequest>

### 4.1*.*2 Messaging Event Types

Below are the messages types necessary for this integration

|  |  |
| --- | --- |
| **Event Type** | **Description** |
| N/A |  |
|  |  |
|  |  |

### 4.1*.*3 Cloverleaf Configuration Files

None, raw feed.

### 4.1.4 Cloverleaf Site Location

phreesia\_33\_p

## 4.2 Data Transformation Requirements

| **Field Description** | **Required Y/N** | **Notes** |
| --- | --- | --- |
| N/A Raw Feed |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## 4.3 Sample Message

<commentRequest xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="soarf\_codedComment.xsd">

<source>

<sourceSystemName>CodedCommentInterface</sourceSystemName>

<referenceIdentifier>CodedComments</referenceIdentifier>

<referenceDate>2019/05/30</referenceDate>

<referenceTime>13:44:19.000000</referenceTime>

<referenceUserIdentifier>Phreesia Payment Posting Coded Comments</referenceUserIdentifier>

</source>

<target>

<identifier>5400057150</identifier>

<type>Enc</type>

</target>

<comment>

<code>PHREESIAPAYMENT</code>

<Text>Pt Paid $25.00 via Cash</Text>

</comment>

</commentRequest>

# 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** |
|  |  |  |  |
|  |  |  |  |

# 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