

# athenahealth

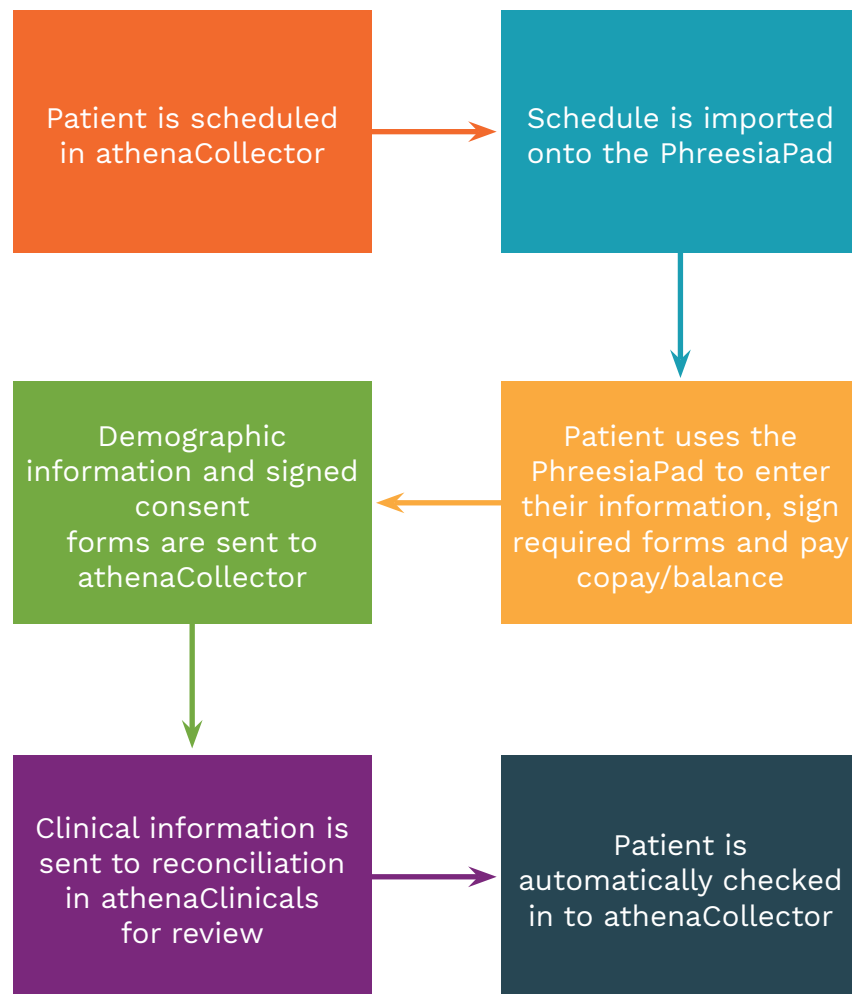
## Integration Summary

**Product Name:** athenaCollector, athenaClinicals

**Integration Type:** Bidirectional (Real-time)

## Workflow

Although the workflow is customized for each medical group's unique needs, a typical workflow with the athenahealth integration looks like this:



# Integration Details - Included Fields

athenahealth → Phreesia

## Appointment

Appointment Type  
Appointment Date  
Appointment Duration  
Appointment Department  
Scheduling Provider  
Appointment Check-In Status

## Demographics

Name (first, middle, last)  
Home Address  
Home City, State, ZIP Code  
DOB  
Sex  
Home Phone Number  
Work Phone Number  
Cell Phone Number  
Email  
Contact Preference  
Marital Status  
Language  
Ethnicity  
Race  
Custom Patient Registration Fields

## UDS Fields

Family Size  
Income  
Agricultural Worker  
Agriculture Type  
Homeless Status  
Homeless Type  
School-Based Health Center Patient  
Veteran Status  
Public Housing  
Sexual Orientation  
Gender Identity

## Other Contact

Guarantor Name  
Guarantor's Relationship to Patient  
Emergency Contact Name  
Emergency Contact's Relationship to Patient  
Emergency Contact's Home Phone Number  
Emergency Contact's Cell Phone Number  
Next of Kin Name  
Next of Kin Relationship to Patient

Next of Kin Phone Number  
Family Member Email (with Full Access Portal)  
Family Member Name (with Full Access Portal)  
Family Member Relationship (with Full Access Portal)

## Insurance

*Primary*  
Insurance Package Name  
Insurance Package ID  
Insurance Policy Group #  
Insurance Policy #  
Insurance Start/End Date

*Secondary*  
Insurance Package Name  
Insurance Package ID  
Insurance Policy Group #  
Insurance Policy #  
Insurance Start/End Date

## Clinical\*

Past Medical History  
Past Surgical History  
Family Medical History  
Social History

GYN History  
Allergies  
Medication Reconciliation

## Policies

athena Privacy Status  
Release of Billing Status  
Release of Billing Effective Date  
Release of Billing Expiration Date  
Assignment of Benefits Status  
Assignment of Benefits Effective Date  
Assignment of Benefits Expiration Date  
Medication History Consent Status  
Consent to Call  
Consent to Text

## Financial

Patient Outstanding Balance(s)  
Patient Outstanding Balance's athena Claim ID  
Expected Copay for Scheduled Appointment

Phreesia → athenahealth

## Appointment

Appointment Check-In Status  
Appointment Check-In Start Time  
Appointment Check-In End Time

## Demographics

Name (first, middle, last)  
Home Address  
Home City, State, ZIP Code  
DOB  
Sex  
Home Phone Number  
Work Phone Number  
Cell Phone Number  
Email  
Contact Preference  
Marital Status  
Language  
Ethnicity  
Race  
Custom Patient Registration Fields  
Release Authorizations  
Interface Consents

## UDS Fields

Family Size  
Income  
Agricultural Worker  
Agriculture Type  
Homeless Status  
Homeless Type  
School-Based Health Center Patient  
Veteran Status  
Public Housing  
Sexual Orientation  
Gender Identity

## Other Contact

Guarantor Name  
Guarantor's Relationship to Patient  
Emergency Contact Name  
Emergency Contact's Relationship to Patient  
Emergency Contact's Home Phone Number  
Emergency Contact's Cell Phone Number  
Next of Kin Name  
Next of Kin Relationship to Patient  
Next of Kin Phone Number

## Clinical\*

Past Medical History  
Past Surgical History  
Family Medical History  
Social History  
GYN History  
Allergies  
PHQ-2/PHQ-9\*\*  
Custom Portal Form Questions  
Medication Reconciliation (Removal Only)  
Review of Systems  
Clinical Alerts

## Policies and Documents

athena Privacy Status  
Release of Billing Status  
Release of Billing Expiration Date  
Assignment of Benefits Status  
Assignment of Benefits Expiration Date  
Medication History Consent Status

Consent to Call  
Consent to Text  
Self-Assessment/Screening Questionnaires (Other)  
Release of Information  
Signature on file

## Financial<sup>†</sup>

Payment Plan  
Card on File  
Patient Payment

\*Clinical integration varies and is based on the group's athenahealth Patient Portal configuration.

\*\*Direct integration into patient chart. Phreesia supports all template questions offered in athenaNet.

<sup>†</sup>Depends on payment processor