

AdvancedMD Integration Summary

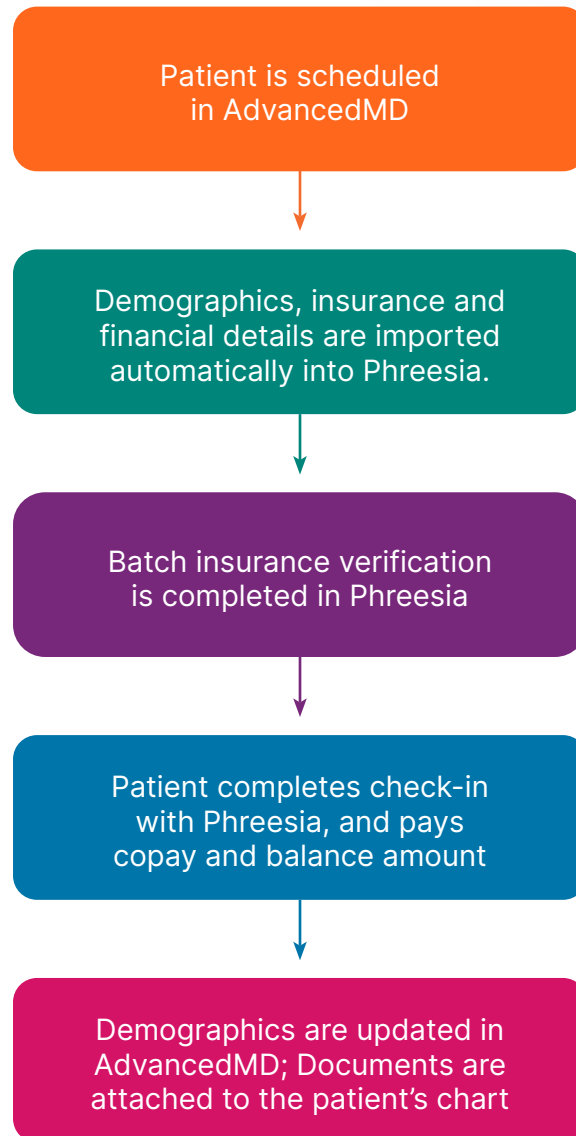


Product Name: AdvancedMD

Integration Type: Bidirectional (Real-time)

Workflow

Although the workflow is customized for each medical group's unique needs, a typical workflow with the AdvancedMD integration is as follows:



Phreesia-AdvancedMD PM Integration Details

AdvancedMD → Phreesia

Appointment

Appointment Date and Time
Appointment Duration
Appointment Reason
Appointment Status
Appointment Location
Appointment Provider
Appointment ID

Patient Demographics

Patient Name
Patient ID
Date of Birth
Gender
Gender Identity

Sexual Orientation
Street Address
City, State, Zip
Home Phone
Cell Phone
Work Phone
Email
Language
Race
Ethnicity
Marital Status
Patient Preferred Names

Insurance Information

Primary and Secondary
Insurance Company

Policy Number
Group Number
Subscriber Name
Relationship to Subscriber

Financial

Responsible Balance, including
Credit Transparency

Phreesia → AdvancedMD

Appointment

Appointment Check-in Status
Appointment Confirmation
and Cancellation

Patient Demographics

Gender Identity
Sexual Orientation
Street Address
City, State, Zip
Home Phone
Cell Phone
Work Phone
Email
Language
Race

Ethnicity
Marital Status
Social Security Number

Consents & Policies

Policies will be customized
per the practice's workflow.
Below are a few examples:
HIPAA Policy or Notice of
Privacy
Financial Policy
Consent to Treat

Captured Images

Patient Photo
Driver's License or ID Card

Insurance Cards (primary/
secondary)
Generic Image Capture

Financial

Responsible Payment