



NextGen Integration Guide

About the Health iPASS - Nextgen Integration

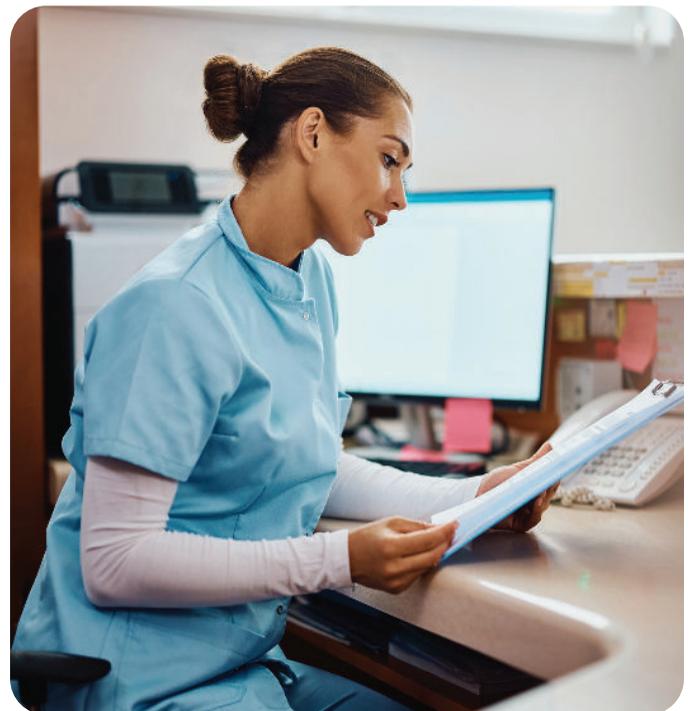
Nextgen integration works to help you accelerate the check-in process, collect more accurate patient information, reduce staff time spent manually transferring patient data, and perform batch eligibility and benefits checks. Patient schedules are automatically imported into Health iPASS every morning and in real-time throughout the current day. Health iPASS can even pull across most patient balances, saving you time and ensuring accuracy!

Data retrieved from Nextgen into Health iPASS

- ▶ Appointment Loads
- ▶ Base Demographic Data
- ▶ Insurance Data from PM
- ▶ Extended Demographic Data
- ▶ Retrieve Patient Balances

Data written back from Nextgen into Health iPASS

- ▶ Appointment Confirmation
- ▶ Appointment Arrival
- ▶ Base Demographic Data
- ▶ Support Custom Payment Batches
- ▶ Insurance Card Upload
- ▶ Payment posting: Co-pay posted to visit
- ▶ Payment posting: Deposit posted to Account
- ▶ Payment posting: Prior Balance posted to Visit/Encounter
- ▶ Document writeback: PDFs, JPGs of Consents, Forms, etc.



Patient Demographics

What information can we get?

- ▶ Address 1
- ▶ City
- ▶ Account ID
- ▶ Chart Number
- ▶ Date of Birth
- ▶ Email
- ▶ Emergency Contact
- ▶ Ethnicity
- ▶ First Name
- ▶ Gender
- ▶ Guarantor
- ▶ Home Phone
- ▶ Language
- ▶ Last Name
- ▶ Middle Name
- ▶ Marital Status
- ▶ Mobile Phone
- ▶ Patient ID
- ▶ Provider
- ▶ Race
- ▶ Sex
- ▶ Social Security Number
- ▶ State
- ▶ Work Phone
- ▶ Zip

What information can we post?

- ▶ Address 1
- ▶ City
- ▶ Account ID
- ▶ Chart Number
- ▶ Date of Birth
- ▶ Email
- ▶ Emergency Contact
- ▶ Ethnicity
- ▶ First Name
- ▶ Gender
- ▶ Guarantor
- ▶ Home Phone
- ▶ Language
- ▶ Last Name
- ▶ Middle Name
- ▶ Marital Status
- ▶ Mobile Phone
- ▶ Patient ID
- ▶ Provider
- ▶ Race
- ▶ Sex
- ▶ Social Security Number
- ▶ State
- ▶ Work Phone
- ▶ Zip

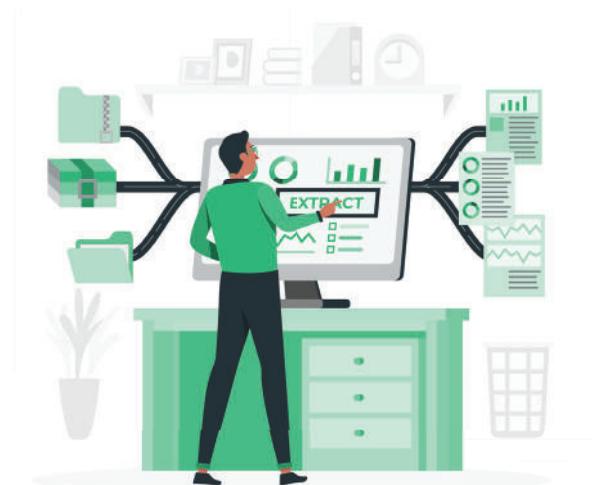
Claims & Payments

What information can we get?

- ▶ Appointment Date
- ▶ Statement Life Cycle State
- ▶ Encounter ID
- ▶ Fee
- ▶ Adjustment
- ▶ Insurance Payment
- ▶ Insurance Balance
- ▶ Patient Payment
- ▶ Other Adjustment
- ▶ Patient Balance
- ▶ Adjudication Date
- ▶ Patient Responsibility Paid-up Date
- ▶ Encounter Details
- ▶ CPT
- ▶ CPT Description
- ▶ Fee
- ▶ Number of Units
- ▶ Service Item ID

What information can we post?

- ▶ Post Patient Payment
 - Post Patient Balance to Visit
 - Post Copay to Visit
 - Post Deposit to Account
- ▶ Open Payment Batches
- ▶ Transaction Amount
- ▶ Location
- ▶ Transaction Type
- ▶ Performed By
- ▶ Encounter Number
- ▶ Transaction ID
- ▶ Applied Payments to Charges
- ▶ Encounter Credits
- ▶ NextGen Batch



Appointment Details

What information can we get?

- ▶ ID
- ▶ Start
- ▶ Duration
- ▶ Patient Alternate ID
- ▶ Physician ID
- ▶ Facility ID
- ▶ Facility Name
- ▶ Notes
- ▶ Status
- ▶ Modified
- ▶ Type
- ▶ Billable
- ▶ Department

What information can we post?

- ▶ Status
- ▶ Billable Provider
- ▶ Patient Type
- ▶ Referring Provider



General Documents | Forms | Images

What information can we get?

- ▶ Name
- ▶ Document Type ID
- ▶ File Format
- ▶ Body

Health iPASS can capture general document information from Nextgen but is unable to retrieve images directly through the API.

What information can we get?

- ▶ Name
- ▶ Date
- ▶ Document Type ID
- ▶ File Format
- ▶ Body

Using an available set of directory paths exposed in the API Health iPASS can create/upload full PDF or JPG documents in Nextgen.*

Clinical Documents

What clinical information can we post to the field level?

- ▶ Past Medical History
- ▶ Past Surgical Conditions
- ▶ Family History
- ▶ Social history
- ▶ Review of Systems
- ▶ Chief Complaint / Additional Complaints
- ▶ PHQ2/9
- ▶ Patient Registration (excluding emergency contact, communication preferences at this time)
- ▶ Privacy Status, Privacy Date

What clinical information can we post as PDF?

- ▶ Allergies & Reactions
- ▶ Medications

Insurance Details

What information can we get?

- ▶ Payer Name
- ▶ Group Number
- ▶ Policy Number
- ▶ Guarantor

