

170.315(b)(10) XML EHI Export of Patient Billing History, rel 4.0

Revision: <u>1.0</u> Revised: <u>11/29/2023</u>

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Medical Device Intended Use Advisory

The Intended Use Advisory provided below is in compliance with Title 21 Chapter I Subchapter H Part 801 of the FDA's Code of Federal Regulations governing medical devices. This Part requires medical device manufacturers to define intended use. With regard to interface specifications reference 801.4 Meaning of intended uses, and 801.5 Medical devices; adequate directions for use.

The software supporting 170.315(b)(10) Electronic Health Information (EHI) Export has been designed, installed, and configured to meet general requirements for exchange of billing history for one or more patients. It is imperative that you consult with SCC should you require a different form of output or require interfaces to support other needs and workflows. Use of the software for any reason other than originally specified may violate the safety, effectiveness, and design controls of this medical device, and such use could result in an increased risk to users and patients.

Our priority is to provide quality health care technology to your site while ensuring that you have the best possible experience using the tools we provide. Working together with the above advisories in mind, we can prevent potential, unintended patient care issues from occurring.

Application

This specification applies to Billing performed via SoftBill or SoftAR installed with SoftLab release 4.0.

Modules: SoftBill SoftAR

Interfaces: 🖂 Billing History

	170.315(b)(10)) XML EHI Expor	t of Patient Billing History, rel 4.0										
	Document Change Control												
Revision #	Date	Author	Main changes										
1.0	11/29/2023	Ray Harms	Original Specification										

Rev: 170.315(b)(10) XML EHI Export of Patient Billing History, rel 4.0 1.0 Export Query and Output

The EHI Billing History and associated utility for EHI Export is designed to meet two scenarios as described within 2015 Cures Update measure 170.315(b)(10) Electronic Health Information (EHI) Export:

- 1) Single Patient EHI Export Export all EHI for a single patient at any time the user chooses.
- 2) Patient Population EHI Export Export all EHI for a patient population

Both exports are required to:

- a) Be electronic and in a computable format
- b) Include a publicly accessible hyperlink of the export's format

Exports meeting this criteria are offered in an XML format, a common industry standard for data exchange in the form of messages. Exports are in an electronically computable format, containing a history of PHI data including history of patient billing. Data within such exports is limited to data maintained within SCC systems. Data residing externally within other systems is not included. Charge data sent to other systems for billing are not included.

Creating an Export

Single Patient Export

To export EHI for a single patient, follow the below step by step process in SoftAR or SoftBill.

1) Open the Patient Account Module.



Interface Specification

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2) Select a patient within the Patient / Invoice Selecting Criteria.

Patient / Invoice Se	electing Criteria	? ×
Patient		
MBN:	SSN:	
Last Name:	First Name:	
Soundex	DOB: Sex	\sim
Street1:		
City:		
State/Province:	Zip/PC: Phone:	
Country:		
Account #:		
Policy Payor:	Policy #:	
Visit		
Inv #:	Biling #:	
Order #:	Doctor	
Auxiliary Order #:	Facility:	
External Order #:	Depot	
Status:	V No policy assigned	leady Only
Invoice Status		
Bill To:	Paid: V Active Invoid	es Only
Due:	- Biled	~
Dates		
Service:	- Last Activity: -	
First Billing:	- Last Biling: -	
First Pmt:	- Last Pmt -	
Query Limit	50 V Options More criteria >>> Clear OK	Exit

3) Once PAM opens to the selected patient, click on Tools the menu bar and then select Health Information Export.

File Add Transaction Account	Invoicing Messages Viewer	' 🧿 🎸 🖿 🖆 🖪
TEST, SKYTEST MIDDLE (00020) Patient Payor Account Invoice Personal MNN: 00020 Second ID: External ID: SSN: Title Last Name DR TEST Comments Address Alternate Address Address Vape: Country: UNITED STATES Street1: 9595 RUPE ROA Street2: SUITE IO City: NEW PORT RICH Zp/PC: 3455-1111 Phone: (Errors Viewer Billing Info Letters Stay Tree Viewer Account Credits Payment History Soft/Media Audit Trail Curtom Fields Ctrl+[Shift]+U Cutom Fields Split Visit Manual Split of Invoice Change Visit Readines Patient Comment Patient Lab Comments and Alerts Visit Comment Refresh-MI Est:	Suffix ESQ SV R Merged To
Phone: (E-mail:	Ext.:	

🖻 目 🖊 👁 🐉 🦢	Invoicing Messages Viewer Billing Errors Viewer	>	> 🛛 🛃 🗖 🎯 🎜 🛍 📾 🗉 🗟 🌙 🔗 K
BPATIENT, BRADLEY [0000000	Letters	>	,
Patient Payor Account Invo	Stay Tree Viewer		
honorononon	Patient Credits		Comments
MRN: 000000000000000000000000000000000000	SoftMedia		Comments
Title Last Name	Audit Trail		e Name Suffix
BPATIENT	Custom Fields	Ctrl+T	
<u>S</u> SN:	Post Current Transaction		Contact
Race: Other 💌	Split Visit		Acct Resp
Address	Manual Split of Visit		
Bad Address Ind	Manual Split of Invoice		
Country:	Consolidate with Another Invoice		r 10201 : 1EG4-TE5-ML72
Street1: 1234 MAIN STREE	Add Next Visit		SELF :
	Change Visit Readiness		_
Street2: APT 3456	Health Information Export	N	
City: NEW PORT RICHE	Check Patient Information	3	Junt -
Zip/PC: 34652	Recalculate Totals	>	> 0000000000000000000000000000000000000
Phone: (727)777-7777	Merge Patient		Pat Due: \$0.00
Phone:	Refresh All	Ctrl+F	Acct Bal: \$74.50
Eff. Until:	List all New		Account Comment
E-mail:			Merged From Merged To

4) The system will automatically initiate the Health Information Export report job within a View File dialog.

View File					?	×
Job						
ID:	12085	Category	e [Reports		
Status:	Completed	Subcategory	e [Health Information Export		
Command:	\$AREBIN/HI_exp	ort! -m 0000000000000000	000	02		
Output /62/03/tra	ce/tition/trace/are	/HI/HI export 102;	rron			
T dEl Col de	001 ((()) () () () () () () ()					
						>
<		>	<			>
Progress				ution Log		
			(G2	/03/trace/trtmp/trace/are/HI/HI_ex	.port_10	271
				Refresh		

5) Double click on the Output within the View File dialog to view the report.

View File				?	\times
Job ID:	12085	Category	Reports		
Status:	Completed	Subcategory			
Command:	\$AREBIN/HI_exp	ort! -m 0000000000000000	0002		
Cutput /G2/03/tra	ce/trtmp/trace/are.	/HI/HI_export_102;	<		>
Progress			xecution Log G2/03/trace/trtmp/trace/are/HI/H	IL_export_102	71
			Refresh	OK	

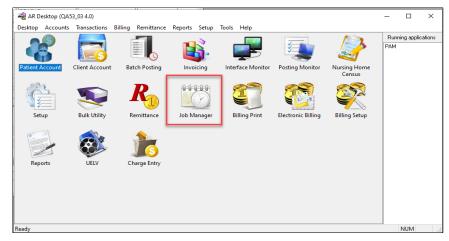
6) Viewing brings up the AR PrintApp window. The EHI Export file may be saved to any accessible location from here.

Bulk Patient Export

To export EHI for a batch of patients, SCC services will be required to manage the process. An export may be filtered by patient type, clinic code, or order range, or may include the full population of patients held in SCC systems. A bulk export requires management of available resources to format output messages, create and save files, and transport the data. The "Bulk" or "Patient Population" Export also follows the specifications for message structure and content detailed herein. Please contact your SCC representative to arrange for such a procedure.

Accessing a Previous Export

1) To view Health Information Export reports previously generated, open Job Manager.



2) Within Job Manager, open Reports and select Health Information Export.

📖 AR Job Manager (QA53_03 4.0)									-			×
File View Tools Options Help												
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⊕ <mark>Billing</mark> ⊕ Bulk		JOB#	1	Subcategory	User	Status	Execution time	Output	Addl Output Info	0+	Log	\sim
⊕ Bulk ⊕ HI7	1			Print Bills	mille	Recurring/Canceled						
- Informer	2	10		Print Bills	60739	Recurring/Canceled						
	3	11		Print Bills	pf	Recurring/Canceled						-
Invoicing Month Close	4	12054		Print Bills	SCC	Completed	10/25/2023 5:13:1	EPIC_231025	EPIC			
Reports	5	12055		Print Bills	scc	Completed	10/25/2023 5:13:3	EPIC_231025	EPIC			_
Health Information Export	6	12059		Print Bills	SCC	Errors					e_EPIC2	2
- Script	7	12060		Print Bills	SCC	Completed	10/25/2023 5:57:4	EPIC_231025	EPIC			
i∰- Shellscript	<										>	~
Ready	_									N	JM	

3) When Health Information Export is selected, all jobs created within the View's Cut off Date will be displayed. Double click on the Output field to view the Health Information Export.

🙄 AR Job Manager (QA53_03 4.0)														-		×
File View Tools Options Help																
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		JOB#	1	Subcategory	User	Status	Execution time	Output	Addl Output Info	0+	Log	E+	Execution	Error#	Wam#	^
Bulk ⊕HI7	1	12056		Health Information Exp	SCC	Completed	10/25/2023 5:20:35	HI_export_1025					HI_export_1025	0	0	
informer	2	12057		Health Information Exp	scc	Completed	10/25/2023 5:28:57	HI_export_1025					HI_export_1025	0	0	
. Interfaces	3	12061		Health Information Exp	scc	Completed	10/25/2023 5:59:08	HI_export_1025					HI_export_1025	0	0	
Honth Close	4	12085		Health Information Exp	scc	Completed	10/27/2023 5:49:04	HI_export_1027					HI_export_1027	0	0	
																~
Ready															NUM	

4) The User can right-click within the Output field and select Save File As... to save to a user defined directory.

🙄 AR Job Manager (QA53_03 4.0)															_		×
File View Tools Options Help																	
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		JOB#	1	Subcategory	User	Status	Execution time	Outp	ut	Addl Output Info	0+	Log	E+	Execution	Error#	Wam#	^
in Bulk in HI7	1	12056		Health Information Exp	SCC	Completed	10/25/2023 5:20:35	HI_export	_1025					HI_export_1025	0	0	+
i Informer	2	12057		Health Information Exp	scc	Completed	10/25/2023 5:28:57	HI_export	_1025					HI_export_1025	0	0	
Interfaces	3	12061		Health Information Exp	SCC	Completed	10/25/2023 5:59:08	HI_export	_1025					HI_export_1025	0	0	
Invoicing Month Close	4	12085		Health Information Exp	scc	Completed	10/27/2023 5:49:04	HI_export	_1027					HI_export_1027	0	0	
Reports Health Information Export Gript Script Shellscript									View Print Expo Expo Expo Print								
Save File As									Save	e File As	5					NUM	

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Save As	otions Help						×
	> This PC > Documents			~	0 گ	Search Documents	
Organize 🔻 Ne	w folder						?
 Quick access Desktop Downloads Documents Pictures This PC Network 	Name # #	^	Date modified No items match ye	Type	Size	6	
File name: Save as type:	HI_export_1027174904						~

.0	Data	Eleme	nts						
	Elemer	Element		ent		Туре	Card	Output	Notes
atier	nt Informa	tion							
atient	Level								
	sccMrn			String	11	Patient MRN	The Medical Record Number.		
	patientNa	me		Ŭ	11				
	ľ	lastName		String	01	Patient Last Name	Patient Last Name		
		firstName	•	String	01	Patient First Name	Patient First Name		
		middleNa	me	String	01	Patient Middle Name	Patient Middle Name		
		prefix		String	01	Patient Name Prefix	Patient Name Title/Prefix		
		suffix		String	01	Patient Name Suffix	Patient Name Suffix		
					1		Patient Date of Birth:		
	dateOfBi	th		Date	01	Patient Date of Birth	YYYY-MM-DD format		
							Patient Sex:		
							M = Male		
							F = Female		
	sex			String	01	Patient Sex	U = Undefined		
	patientAc	dress			01				
		addressL	ine1	String	01	Patient Address, line 1	Patient Street Address		
		addressL	ine2	String	01	Patient Address, line 2	Patient Street Address - Additional		
		city		String	01	Patient Address, city	Patient's City of residence		
		state		String	01	Patient Address, state	Patient Address, State		
		zip		String	01	Patient Address, zip code	Patient Address, Zip Code		
	financial	Level		Record	0*		Financial level resources		
voic	e Data								
	alLevel								
	encounte	r			1*				
		sccld		String	11	Invoice Number	Patient Invoice Number		
				5			Date of Service for the Invoice:		
		date		Date	11	Date of Service	YYYY-MM-DD format		
		orderingF	rovider		01				
		o. dog.	lastName	String	01	Requesting Doctor Last Name	Ordering / Requesting Doctor Last Name		
			firstName	String	01	Requesting Doctor First Name	Ordering / Requesting Doctor First Name		
			npild	String	01	Requesting Doctor NPI	Ordering / Requesting Doctor NPI		
		rendering		Cg	01				
		. shacing	lastName	String	01	Performing Doctor Last Name	Performing Doctor Last Name		
			firstName	String	01	Performing Doctor First Name	Performing Doctor First Name		
			npild	String	01	Performing Doctor NPI	Performing Doctor NPI		
	chargeL	vel		Record	0*		Charge level resources		
	transLev			Record	0*		Transaction level resources		

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	Elemen	t				Туре	Card	Output	Notes
Item Info)								
chargeLev	vel								
			1						idx: Invoice extension
	invoice						1*		status: Active / Canceled / Posted
		item name	e			Text	01	Item Description	Item Name > CPT Code Description
			cpt			String	01	CPT Code	CPT Code
			cdm			String	01	CDM Code	CDM Code
			mod i="1"			String	01	Modifier #1	Billing service code modifier
			mod i="2"			String	01	Modifier #2	Billing service code modifier
			mod i="3"			String	01	Modifier #3	Billing service code modifier
			mod i="4"			String	01	Modifier #4	Billing service code modifier
			dx i="1"			String	01	Diagnosis Code #1	Test level ICD10 diagnosis code
			dx i="2"			String	01	Diagnosis Code #2	Test level ICD10 diagnosis code
			dx i="3"			String	01	Diagnosis Code #3	Test level ICD10 diagnosis code
			dx i="4"			String	01	Diagnosis Code #4	Test level ICD10 diagnosis code
			quantity			Numeric	01	Quantity	Number of units
			charge			Numeric	01	Charge	Unit Charge amount
			paid			Numeric	01	Paid Amount	Item amount paid at time of export
			balance			Numeric	01	Balance	Item balance of invoice at time of export
			performing	Lab			01		Item Performing Laboratory details
			ľ.	npild		String	01	Item Facility NPI	Item Performing Laboratory NPI (National Provider Identifier) number
						Ŭ			Item Performing Laboratory CLIA (Clinical Laboratory Improvement Amendments)
				cliald		String	01	Item Facility CLIA	number
Transac	tion Dat	a							
									Transaction ID / Transaction Code representing the type of transaction
transLeve	I								(e.g. INV/Invoicing, VOID/Invoicing recalculation, BILL/Billing, etc)
									uid: Transaction counter
									idx: Transaction extension
	transactio	n					1*	Transaction ID / Transaction Code	scc/d: User defined, such as INV=Invoicing / VOID=Invoicing recalculation / BILL=Billing
	anoaono		1		1				The financial classification of the Transaction code. The options are:
									CHARGE – This transaction generates revenue for the lab.
									PAYMENT – This transaction is used to register received payments.
									ADJUST – This transaction includes a financial operation that is neither a charge nor a
									payment transaction.
		kind				String	01	Kind	ACTION – This transaction is a non-financial operation (for example, a bill).
		descr	1			Text	01	Transaction Description	The description of the transaction code.
		amount	1			Numeric	01	Amount	The Transaction Amount
		amount	+			amono	01		Transaction Date:
		date				Date	01	Date	YYYY-MM-DD format
		payor	+			String	01	Payor Description	Transaction Payor Description
		Payor	-			Sang			

Rev: 170.315(b)(10) XML EHI Export of Patient Billing History, rel 4.0 1.0 Example output message

<?xml version="1.0" encoding="UTF-8" standalone="yes"?> <Message> <Date>2023-10-30</Date> <Time>08:12:29</Time> <Data> <patientLevel> <sccMrn>000000000000000002</sccMrn> <patientName> <lastName>BPATIENT</lastName> <firstName>BRADLEY</firstName> <middleName></middleName> <suffix></suffix> <prefix></prefix> </patientName> <dateOfBirth>1951-02-07</dateOfBirth> <sex>M</sex> <patientAddress> <addressLine1>1234 MAIN STREET</addressLine1> <addressLine2>APT 3456</addressLine2> <city>NEW PORT RICHEY</city> <state>FL</state> <zip>34652</zip> </patientAddress> <financialLevel> <encounter> <sccld>LG62500001</sccld> <date>2023-10-25</date> <orderingProvider> <lastName>AARONSON</lastName> <firstName>HADASSAH</firstName> <npild>1225169238</npild> </orderingProvider> <renderingProvider> <lastName>BARTHOLOMEW</lastName> <firstName>ANN</firstName> <npild>1356471767</npild> </renderingProvider> <chargeLevel> <invoice status="Active" idx="1"> <item name="Assay of phosphorus">

SCC EHI export Billing History rel4.0.xlsx Example

Example

<cpt>84100</cpt> <cdm>11242922</cdm> <mod i="1"></mod> <mod i="2"></mod> <mod i="3"></mod> <mod i="4"></mod> <dx i="1">A00.9</dx> <dx i="2">A03.8</dx> <dx i="3">B00.7</dx> <dx i="4">B00.50</dx> <quantity>1</quantity> <charge>39.00</charge> <paid>0.00</paid> <balance>32.00</balance> <performingLab> <npild></npild> <cliald>12D4567890</cliald> </performingLab> </item> <item name="Assay of creatinine"> <cpt>82565</cpt> <cdm>11242732</cdm> <mod i="1"></mod> <mod i="2"></mod> <mod i="3"></mod> <mod i="4"></mod> <dx i="1">A00.9</dx> <dx i="2">A03.8</dx> <dx i="3">B00.7</dx> <dx i="4">B00.50</dx> <quantity>1</quantity> <charge>51.00</charge> <paid>0.00</paid> <balance>42.50</balance> <performingLab> <npild></npild> <cliald>12D4567890</cliald> </performingLab> </item> </invoice> </chargeLevel> <transLevel> <transaction sccld="INV" idx="1" uid="71"> <kind>CHARGE</kind> <descr>Invoicing</descr> SCC EHI export Billing History rel4.0.xlsx

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<amount>90.00</amount> <date>2023-10-25</date> <payor sccId="00201">MEDICARE</payor> </transaction> <transaction sccId="BILL" idx="1" uid="72"> <kind>ACTION</kind> <descr>Billed to 00201</descr> <amount>90.00</amount> <date>2023-10-25</date> <payor sccId="00201">MEDICARE</payor> </transaction> <transaction sccId="CK" idx="1" uid="73"> <kind>PAYMENT</kind> <descr>CHECK PAYMENT</descr> <amount>-15.50</amount> <date>2023-10-25</date> <payor sccId="00201">MEDICARE</payor> </transaction> </transLevel> </encounter> </financialLevel> </patientLevel> </Data> </Message>