**Outbound Data File Delivery**

***Integration Package***

athenahealth, Inc.

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Formerly Outbound Automated Reports or Automated Report Delivery

**Project Overview**

## **Product Description**

With the Outbound Data File Delivery offering, athenahealth can deliver any existing custom report or Report Builder report that already exists in athenaNet, to a third-party FTP server. Please consult your athenahealth project representative or Customer Success Manager for more information about the development of the report. This interface can be used in conjunction with a General Ledger or appointment reminder system, or any other system that requires regular delivery of data. Reports can be delivered as frequently as once per calendar day and connectivity must be FTP hosted by the receiving system.

Should you need more than one report delivered, please fill out an additional Integration Package for each report.

## **Project Information**

Please fill the following to the best of your ability. While not all contacts are required, you should be able to submit at least two contacts at the onset of a new interface project.

|  |  |  |
| --- | --- | --- |
| General Information |  |  |
| athenahealth Practice Context ID |       |
| athenahealth Interface Project Manager Name |       |
| athenahealth Interface Project Manager Contact Information |       |
| Event Number (provided by Interface Project Manager, for internal athenahealth tracking) |       |

|  |  |  |  |
| --- | --- | --- | --- |
| Contact | Role | Details |  |
| Project Business Contact | Responsible for overall success of the project | Name:  |       |
| Phone:  |       |
| Email:  |       |
| Project IT Contact | Networking and security expert, responsible for overall connectivity | Name:  |       |
| Phone:  |       |
| Email:  |       |

# **Delivery Configuration**

## **Connectivity**

athenahealth will need to establish connectivity to a third-party FTP server as a secure transfer method for the report. athenahealth will initiate outbound connections to a third-party SSH2 server. Once the SSH tunnel is established we can exchange files locally using FTP.

Please complete the following table with the connectivity information:

|  |
| --- |
| Locally Hosted FTP Information |
| FTP Type | [ ]   SFTP[ ] FTP over VPN\* |
| IP address or URL of FTP server |       |
| Public Port of FTP Server | 22 |
| FTP Username |       |
| FTP Password (12-20 characters) | Please send separately in an encrypted email |
| File Path to FTP Directory |       |

\* If FTP over VPN is selected, and the receiving system does not have an existing VPN tunnel with athenahealth, then the VPN Connectivity Worksheet must be completed as well. This can increase the project timeline by several weeks. If there is an existing VPN, the athenahealth interface project engineer will require the peer IP of the tunnel.

**NOTE:** Please ensure that you allow traffic from the following athena IPs:
208.78.140.30
198.36.120.4/30 and 198.36.124.4/30

## **Delivery Cycle**

Please complete the following table for all Outbound Automated Report interfaces:

|  |
| --- |
| Preference for Delivery Cycle (check one): |
| [ ]  |  Daily Batches will be sent between 4am and 6am |
| [ ]  | Daily Batches will be sent at other specified time:       |
| [ ]  | Weekly Batches will be sent at specified day of week and time:        |
| [ ]  | Monthly Batches will be sent at specified day of month and time:        |

## **Data File Configuration**

### ***Report Selection***

Please select the report type in the table below that applies to your request (choose a single report type):

|  |  |  |  |
| --- | --- | --- | --- |
|  | Report Type | Direction | Report Information |
| [ ]  | Report Builder Report(including General Ledger Reports) | Outbound | Context ID:      Report Library Tab:      Report ID:      Report Name:       |
| [ ]  | Custom Report | Outbound | Context ID:       Report Library Tab:      Report ID:      Report Name:       |

### ***Delivery Options***

|  |  |
| --- | --- |
| Configuration Item | Options |
| Delivered Report Name | [ ]   ReportName\_YYYYMMDD.txt |
| [ ]  Custom:      If a backfill requires separate name, please specify:       |
| Delivered Report Format | [ ]  Tab Delimited |
| [ ]  Custom: Comma Delimited |
| [ ]  Custom: Record Separator with  [ ]  CR [ ]  LF [ ]  CRLF |
| [ ]  Custom:       |
| Delivered Report Options | [ ]  Suppress Column Headings |
| [ ]  Suppress Report Name |
| [ ]  Show Filter Criteria |

### ***Input Fields and Filters (Binds)***

Depending on the design of the report there may be additional filters that need to be set.

Please navigate to your Report Library and click **Schedule** next to your report, which will display a screen that will include a section like the following (if these additional filters exist):



In the table below, use the second column to list the available filters from that page (example: Post Date Range). In the third column, provide the bind values that the interface script should use to run the report (example: Yesterday). In the 4th column, provide the values that should be used for scheduling the backfill running of this report, if applicable, (example: Show All).

Be sure to check the Enable checkbox for all relevant rows. Recommended date filters are pre-populated for efficiency.

|  |  |  |  |
| --- | --- | --- | --- |
| Enable? | Report Filter (Bind) | Bind Values for Recurring Report Delivery | Notes |
| Date Filters (select one) |
| [ ]  |       | T-1 (Yesterday)  | Recommended for daily report delivery |
| [ ]  |       | Previous Week | Recommended for weekly report delivery |
| [ ]  |       | Previous Month | Recommended for monthly report delivery |
| [ ]  |       | <custom date filtering> |  |
| Other Filters |
| [ ]  |       |       |  |
| [ ]  |       |       |  |
| [ ]  |       |       |  |
| [ ]  |       |       |  |
| [ ]  |       |       |  |

## **Historical Backfill**

An additional option is for athenahealth to generate and send a file (or files) containing historical data. This would be run once, when the ongoing feed is started, covering a period up until that point.

Please note that backfill availability is dependent on the report having a date filter, and therefore may not be available or applicable for all reports.

Does this project require a backfill?

If a historical backfill is required, please complete the following section.

### ***Backfill Report Configuration***

|  |  |
| --- | --- |
| Configuration Item | Options |
| Backfill Report (If different from report selection above) | Report Library Tab:      Report ID:      Report Name:       |
| Delivered Report Name | [ ]   ReportNameYYYYMMDD\_BACKFILL.txt |
| [ ]  Custom:      If a backfill requires separate name, please specify:       |
| Backfill Date Range  | Start Date:       |
| End Date:       |
| Input Fields and Filters (Binds) | Report Filter (Binds) | Bind Values for Backfill Report |
|       |       |
|       |       |
|       |       |
|       |       |
|       |       |
|       |       |

Additional backfill requirements:

## **Additional Comments**

Please enter any additional comments and notes here:

# **Go-Live Authorization Form**

## **Continuing Service and Support**

Within two weeks after go-live your interface will be transitioned into our daily service and support structure.

As a standard practice, athenahealth continuously monitors all client connections and will notify the contacts specified if an error occurs. All jobs are monitored and automatically restarted if idle.

To contact athenahealth for help or support post go-live, the following resources are available:

1 Integration Monitoring: IntegrationMonitoringRequests@athenahealth.com

Additionally, it is **required** to provide support contact information for the client and trading partner for use by athenahealth interface support. When possible, general support hotlines and email address are preferred.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Name | Company | Title | Office Phone | Mobile Phone | Email |
|       |       |       |       |       |       |
|       |       |       |       |       |       |
|       |       |       |       |       |       |
|       |       |       |       |       |       |
|       |       |       |       |       |       |

## **Interface Go-Live Signoff**

Reference is made to the Athenahealth services agreement (the “Agreement”) entered into by and between athenahealth, Inc. (“Athena”) and the client set forth on the signature page below (“Client”, “you” or “your”). In order to move your interface (or interface change requiring testing) (the “Interface”) into your athenaNet production environment, you must sign off on the functionality of the Interface by execution of this Go Live Authorization Form. Client agrees to fully cooperate with Athena and provide all assistance reasonably necessary for Athena to create, implement and maintain the Interfaces. Client acknowledges that Athena’s performance is contingent on Client’s timely and effective performance of its obligations and understands that the operability of the Interfaces depends on Client’s ability to maintain its own equipment and functionality. Client has obtained or will obtain all consents, licenses, and waivers and has fulfilled all legal obligations that are necessary to allow Athena to create, implement and maintain the Interfaces. Additional changes to the scope of the Interface once loaded into athenaNet production will involve additional project work and potentially incur additional costs. In addition, Client acknowledges that moving the Interface to athenaNet production environment may require changes to athenaNet practice settings and in connection with this Go-Live Authorization Form authorizes all required changes in athenaNet.

Upon receipt of this signed form, Athena requires a minimum of 2 business days to move your Interface to go live.

The terms of this Go Live Authorization Form are hereby incorporated into the Agreement and shall become effective upon Client’s signature below. By signing below, Client acknowledges that it is satisfied with the functionality of the Interface set forth below and Client authorizes Athena to enable such Interface to be deployed to athenaNet production.

Client:

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name:

Position:

Date: