Customer Exit

Overview

This document outlines the data that can be exported in the event of a customer exit.

Encounters, Orders, **Invoices, and Documents & Images** are exported in PDF format (1 encounter/PDF/patient; 1 order/PDF/patient; 1 invoice/PDF/patient; 1 Document or Image/PDF/patient).

The **Patient Data, Administrative Data and Product & Services Catalog Data** below is exported to Excel spreadsheets (1 spreadsheet/category).

Patient Data

Patient Demographics
Salutation
First Name
Middle Name
Last Name
Suffix
Nickname
DOB
Gender
Email
SSN
Marital Status
Address 1
Address 2
City
State
Zip
Home phone
Work phone
Cell phone
Other phone
Pager
Fax
General Note
Primary Provider
Primary Location
Patient ID

Appointments (past and future)
Type
Provider
Location
Note/Comment
Appointment ID
Patient ID
Start Date (and time)
End Date (and time)
Appointment status
Employee
Role
Summary
Create date
Created by
Updated date
Updated by
Confirmation status
Confirmation date
Insurance validity
Insurance comment
Insurance Verification date
Insurance Verified by

Accounting[3]
Patient Balance
Patient Credit
Insurance Balance

Spec Rx
Sphere
Cylinder
Axis
Add
Vertical Prism
Vertical Prism Orientation
Horizontal Prism
Horizontal Prism Orientation
Rx Date
Patient ID
Balanced
Near Add
Intermediate Add
Distance PD
Near PD
Exp Date

Patient Demographics (cont)

External patient ID
Person ID
Create date
Patient Status (act/inact/dec)
Patient Type (new/established)
Start Date
Professional Credentials
Date of death
Preferred phone
Race
Ethnicity
Primary language
Religion
Employer
Position
Employment status
Employer Address 1
Employer Address 2
Employer City
Employer State
Employer Zip
Guarantor

Recalls

Date
Type
Comment
Patient ID
Recall status
Last Communication Date
Number of Communications
Related appointment ID
Created date
Updated date

Diagnoses

ICD9
Dx Date

CL Rx

All fields

Notes

Insurance

Company name
Policy #
Group #
Plan Name
Policy Holder Relationship
Policy Holder Person ID
Policy Holder First Name
Policy Holder Last Name
Policy Holder DOB
Policy Holder Address
Policy Holder Home Phone
Policy Holder Gender

Administrative Data

Employees

Employee ID
First Name
Last Name
User Name

External Providers

Provider ID
First Name
Last Name
NPI

Product & Services Catalog Data

Services

Location
Service ID
Service Type
Code
Modifier
Name
Short Description
Long Description
Invoice Description
Common Description

Products

Location
Product ID
Category
Manufacturer
Brand
Collection
Model
Product Code
Invoice Description
Actual Cost

Physical Inventory

Item ID
Location
Product ID
Category
Manufacturer
Brand
Collection
Model
Product Code
Invoice Description

Services (continued)	**Products (continued)**	**Physical Inventory (cont.)**
Tax	Wholesale Price	Actual Cost
Price	Multiplier	Wholesale Price
	Additional Amount	Multiplier
	Retail Price	Additional Amount
	Tax	Retail Price
		Tax
		UPC
		SKU
		Default Supply Cost
		Unit Price
		Packaging
		CL is Trial
		CL Parameters
		Eyeglass Lens Parameters
		Frame Size Measurements
		Item Quantity
		Stock Status

[3] For patient balances, this is the balance only and does not include any details for the charges represented by the balance.