·ractice Fusion (New) Bi-Directional Interface ·ngoing Maintenance

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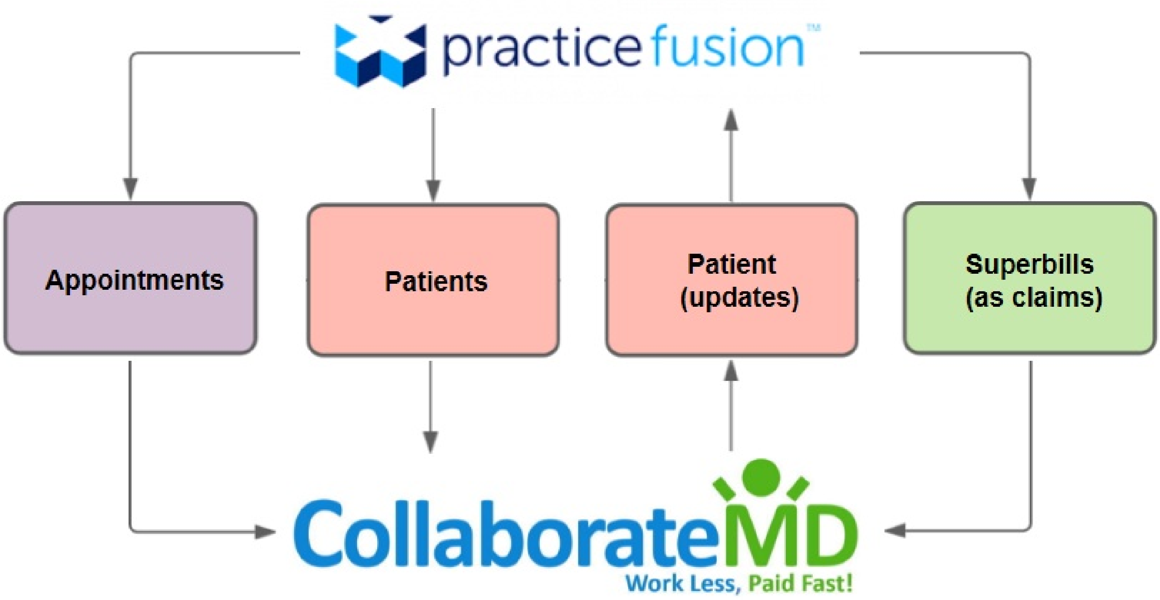
The Practice Fusion Bi-Directional Interface is now available for new activations. All new interface connection requests will be activated on the new bi-directional interface. All existing interfaces will be able to upgrade to a Bi-Directional integration in the future.

·low of Data in the new PF Bi-Directional Interface

·lew Appointments, Patients, and Superbills (Claims) are sent from Practice Fusion to CollaborateMD ·hrough the interface messages and will create (or update) a new record in CMD. Once a patient record ·lready exists in CMD, it can be updated in CMD and the data will flow back to PF.



·lanage Appointments

·lew appointments that are entered in Practice Fusion are automatically created in CollaborateMD. Before ·ny appointment interface messages (SIU) can be sent from PF, the scheduler configuration must be ·ompleted in CMD.

·t a bare minimum, the Resource(s) and Appointment Type(s) need to be added and configured in CMD ·efore appointments can be sent from PF.

he appointment message (SIU) sent from PF to create an appointment will also create a new patient recor
ı CMD if it doesn't yet exist.

Appointment updates cannot be sent from CMD to PF, they will only flow from PF to CMD.

Admins and Auth Reps can use disable Appointment messages for PracticeFusion. This should be used for accounts that **do not** use the Scheduler in CollaborateMD. This prevents errors from appearing in Interface Tracker for these appointment messages. This setting can be turned on/off from **Interface > Settings** then clicking Edit

lanage Facilities

lew Facilities entered into CollaborateMD must be added to Practice Fusion.**The following scenarios neec**
ɔ follow a one-time set-up to map their PF and CMD facilities:

- New Bi-directional Interface customers
- Customers upgrading from the old interface to the bi-directional interface
- Customers that add a new facility (into either system)
- If the Facilities are not coming over on claims created by the Practice Fusion Bi-Directional interface.

ailing to add and sync the new Facilities into Practice Fusion will result in the claim not having a Facility
sted on it or interface message errors.

You can manually update a claim within the**Claim** section of CMD with the correct Facility information.

ollow the steps below to map new Facilities if any of the previous scenarios apply:

o map a facility from Practice Fusion to CMD (so it will come over on claims created by the interface)

1. Log in to Practice Fusion
2. Go to Settings
3. Scroll down and find “Facilities”
4. Click on the facility you want to map

Important: Please note that if a new Facility is added in PracticeFusion, that Facility's GUID (available in the URL bar of your browser) must be added as the reference # on the Facility in CollaborateMD in order for the facility to transfer over.

5. From the URL, copy everything after the **LAST "/"** (e.g. 9430ddcc-987e-4e0a-9b08-e19800bad67d)

6. Log in to **CMD**

7. Go to **Customer Setup -> Facilities**

8. Open the Facility record in CMD to match the Facility record from step 5

9. Paste the value copied in step 5 into the "**Reference #**" field (located underneath Taxonomy Specialty)

10. Save the **Facility** record in CMD

This process must be done for each of the facilities (one-time setup).

xisting Facilities

ny updates that need to be made to an existing Facility (i.e. Name, Address, Id Number, etc) **must be done ithin CollaborateMD**. Please see the Find/Edit Facility Help Page for additional information.

anage Providers

lew Providers entered into CollaborateMD must be added to Practice Fusion. Failing to add the new rovider into Practice Fusion will result in an interface message error.

ollow the steps below to manage new Providers:

1. Add the Provider into CollaborateMD. Please see the Add Provider Help Article.

2. Once the Provider is entered, please see the Sync Providers help page and follow the steps to sync your Providers.

xisting Providers

Ipdates that need to be made to an existing Provider (i.e. Name, Address, Id Number, etc) **must be done ithin CollaborateMD**. Please see the Find/Edit Provider Help Page for additional information.

/lanage Patients

lew Patients

lew patients that are entered in Practice Fusion are automatically created in CollaborateMD at the time ou submit the superbill from Practice Fusion to CollaborateMD. The following fields will be sent from ractice Fusion to CollaborateMD when a new patient is created:

irst Name	Cell Phone Number	Insured ID
ast Name	Guarantor Relationship	Subscriber Relationship
/iddle Name	Guarantor First Name	Subscriber First Name
iender	Guarantor Last Name	Subscriber Last Name
SN	Guarantor Address Line 1	Subscriber Middle Initial
)ate of Birth	Guarantor Address Line 2	Subscriber Address Line 1
:mail	Guarantor City	Subscriber Address Line 2
)ate of Death	Guarantor State	Subscriber City
ddress Line 1	Guarantor Zip Code	Subscriber State
ddress Line 2	Guarantor Home Phone Number	Subscriber Zip Code
:ity	Guarantor Work Phone Number	Subscriber Phone 1
tate	Insurance Information (Up to 3 Insurances)	Subscriber Phone 2
:ip Code		Co-pay / Co-insurance
lome Phone Number		Payer
Vork Phone Number		Insurance Effective Date
Vork Extension		Group ID

xisting Patients

a patient entered in Practice Fusion already exists within CollaborateMD when you submit a superbill , ie superbill will automatically search for the patient's record. The fields used to match Practice Fusion atients to pre-existing CollaborateMD patients are:

- First Name, Last Name, and Date of Birth (All Exact Matches)
- SSN and Last Name (Both Exact Matches)
- SSN and Date of Birth (Both Exact Matches)

ı the event a patient's record needs to be updated you have the following options:

1. Update the patient's record within Practice Fusion. This will automatically update the patient's demographics in CMD. Patient Data is not dependent on the superbill to **update** anymore. It will flow over immediately from PF.
2. Or, update the patient's record in CollaborateMD. This will automatically update the patient's

demographics in PF to ensure both systems are up to date with the most recent patient information.

Patients will not flow from CMD to PF but updates to patients will. Patient updates will only be sent from CMD to PF if the patient has been already sent from PF to CMD at some point (even using the old interface).

⁄lanage Claims & Charges

his information explains how to edit a claim that has already been sent over from the interface, whether ıat means you want to add or remove CPT Codes, ICD Codes, Modifiers, etc.

:harges

lere are some important things to be aware of:

- Users are unable to add codes into Practice Fusion.
- Although not required, it's highly recommended that users configure their Codes within CollaborateMD. Please see the Codes Help Article for additional assistance.
- ICD codes that aren't in your personal code list will automatically be added from the CollaborateMD code list once retrieved from Practice Fusion.
- Claims will be marked as incomplete in the event a code is missing from your personal list and CMD's code list. If the code is missing:
    - You will either have to manually open the claim and save it so the system can save the claim as complete.
    - Or, manually add the code to your personal list.

lease see the Managing Incomplete Claims Help Page for additional assistance.

ı the event you need to add additional procedure codes to a Claim/Superbill once it's been sent over to :ollaborateMD please see the Find/Edit Claim Help Article for additional assistance. You can right click on ıe Claim via Claim Status Control and choose the option to open the Claim. Please reference our Status :ontrol Help Article for more information.

:laims

his information explains how claim and insurance information for patients is managed between :ollaborateMD and Practice Fusion once you've integrated your CollaborateMD account.

lere are some important things to be aware of:

- Practice Fusions insurance companies will be matched to CollaborateMD insurance companies by comparing the Payer Address or Name in both systems.
- If the Payer in Practice Fusion **does not match** a Payer in CollaborateMD, the Superbill will be **rejectec**
- The address and name will have to match exactly. Please review the Synchronizing Payers Help Article for more information.

  If the Payer's Address sent from Practice Fusion matches multiple payers within CMD the system will use the insurance associated with the patient's record and add that payer to the claim.

- In the event a Superbill is rejected for this reason please make sure that the payer record has a match in both systems (name, address) and resubmit the superbill. **This will create a new claim. Please delet the initial claim prior to resubmitting the second one.** Please see the Delete Claim Help Article for additional assistance.
- In the event you do not want to submit another Superbill you can manually update the claim or patients record within CollaborateMD and/or Practice Fusion

/lanage Payments & Copays

The Practice Fusion interface setting that allows the interface to post payments is enabled by default. To manage this setting, visit our Activate The PF Interface Within CMD Help Article.

his information explains how to handle payments that have already been sent over from the interface, anc ow to post them.

'ayments

lere are some important things to be aware of:

- Users are able to add payments into Practice Fusion that will transmit to CMD.
- When entering the payment into the PF superbill, users will select "Payment on account" as the payment type.

- If "Payment on account" is selected, it will be posted as an account credit in CMD when the claim is created.
- The account credit must then be applied to the claim from CMD. Please see the Apply Account Credit to a Claim Help Article for additional assistance.

Please note that only users with the Patient Payment permission can post patient payments within the Claim section.

:opays

his information explains how to handle copays that have already been sent over from the interface, and ow to post them, or enable the setting to automatically post them.

lere are some important things to be aware of:

- Users are able to add copays into Practice Fusion that will transmit to CMD.
- When entering the copay into the PF superbill, users will select "Copay" as the payment type.
- If "Copay" is selected, it will be posted as a copay credit in CMD when the claim is created.
- The unapplied copay credit must then be applied to the claim from CMD. Please see the Apply an Unapplied Copay to a Claim Help Article for additional assistance.
- Alternatively, enable the claim setting "**Automatically apply unapplied copays when claims are entered**" and select "**Through an interface**" from the dropdown to automatically apply the copay upor claim creation. If you prefer to post the copay payment after the ERA is posted, you can also enable th Payment Setting "**Automatically apply unapplied copayment when an ERA is posted?**".