



Integrating Kareo with Third-Party
Applications Using the Kareo Web Services
API 2.1
May 2013

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1. Overview

Welcome to the Kareo guide to integrating Kareo with third-party applications using the Kareo Web Services API! This guide shows you how you to build software applications that access the Kareo Web Services API and provides a technical reference guide to the operations you can perform.

The Kareo Web Services API is an application programming interface that enables computer programs to access Kareo data and functionality by communicating with Kareo servers over the Internet. The Kareo Web Services API is built on the latest standards-based technologies used for web-based software integration including Simple Object Access Protocol (SOAP), Extensible Markup Language (XML) and Web Services Description Language (WSDL). This collection of technologies is commonly referred to as a “web services” interface.

With the Kareo Web Services API, you can perform the following operations:

- Retrieve data from five different types of records in Kareo, including appointments, charges, patients, providers, and transactions
- Insert new records for two different types of records in Kareo, including patients and encounters

The Kareo Web Services API can be used to:

- Integrate patient and charge data from an electronic medical records (EMR) system with Kareo
- Interface financial data to be exported into an accounting system, such as QuickBooks
- Interface with a third-party appointment reminder system
- Create your own computer programs to import data into Kareo
- And much more...

Important Note: This guide is written for a technical audience. The information in this guide is intended to be used by IT staff or consultants affiliated with Kareo customers or software developers affiliated with third-party software companies seeking to integrate their products with Kareo.

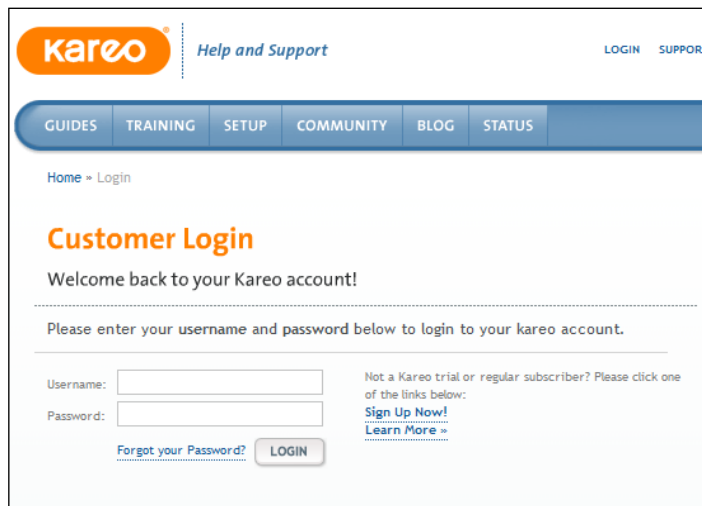
2. Configuring Security and Access

In order to integrate Kareo with third-party applications using the Kareo API, you must use valid security credentials and you must enable special security permissions associated with your Kareo account that are disabled by default. The topics in this chapter explain how to get your customer key and how to grant the security permissions required by the Kareo API.

2.1 Getting Your Customer Key

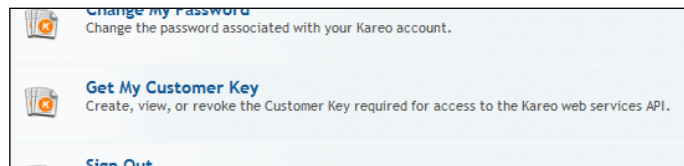
Kareo requires that a special Customer Key be used as an added security precaution when you access your data outside the Kareo application. You must supply your Customer Key in addition to your Login and Password when accessing your Kareo data through the API. If you do not have a Customer Key, or you do not know what your Customer Key is, follow the steps below:

1. Login to <http://help.kareo.com/login/>.



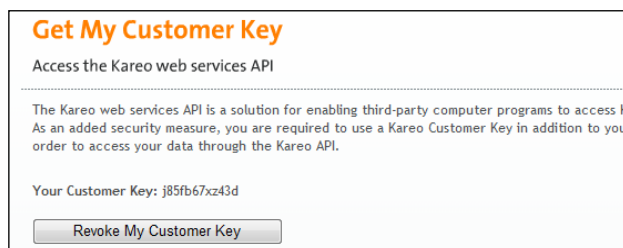
The screenshot shows the Kareo Customer Login page. At the top, there is a navigation bar with the Kareo logo, "Help and Support", and links for "LOGIN" and "SUPPORT". Below this is a menu with tabs for "GUIDES", "TRAINING", "SETUP", "COMMUNITY", "BLOG", and "STATUS". The main content area has a breadcrumb "Home » Login" and a heading "Customer Login". A welcome message says "Welcome back to your Kareo account!". Below that, it asks the user to enter their username and password. There are input fields for "Username:" and "Password:". To the right of the password field, there are links for "Sign Up Now!" and "Learn More >>". At the bottom left, there is a link for "Forgot your Password?" and a "LOGIN" button.

2. Select the **Get My Customer Key** option.



The screenshot shows a list of account management options. The first option is "Change my Password" with a description: "Change the password associated with your Kareo account." The second option is "Get My Customer Key" with a description: "Create, view, or revoke the Customer Key required for access to the Kareo web services API." There is also a "Sign Out" link at the bottom.

3. If your Customer Key has not yet been provisioned, click the **Create My Customer Key** option.
4. Otherwise, print or take note of your **Customer Key**.



The screenshot shows the "Get My Customer Key" page. It has a heading "Get My Customer Key" and a sub-heading "Access the Kareo web services API". Below this, there is a paragraph explaining that the Kareo web services API is a solution for enabling third-party computer programs to access Kareo data, and that as an added security measure, a Customer Key is required. The page displays the user's Customer Key: "Your Customer Key: j85fb67xz43d". At the bottom, there is a button labeled "Revoke My Customer Key".

2.2 Granting Security Permissions

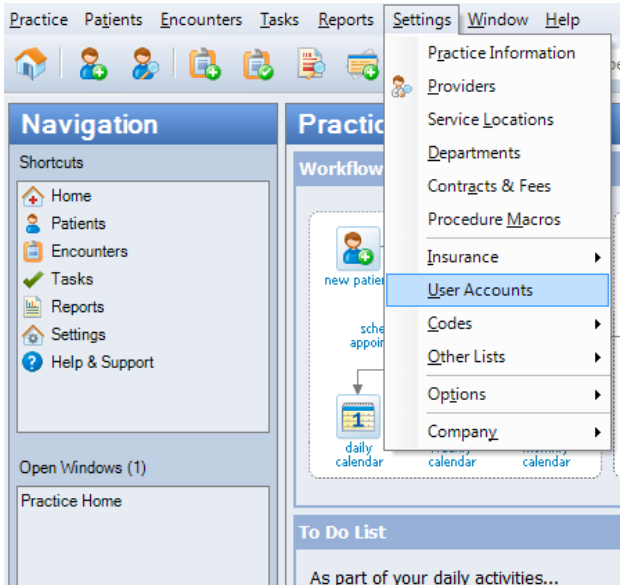
In order to keep your data secure, your system administrator must configure the security settings in Kareo to grant you permission to use the Kareo Web Services API before you can perform any operations using the API.

To grant a user the security permissions required to access your Kareo data through the API, follow the steps below:

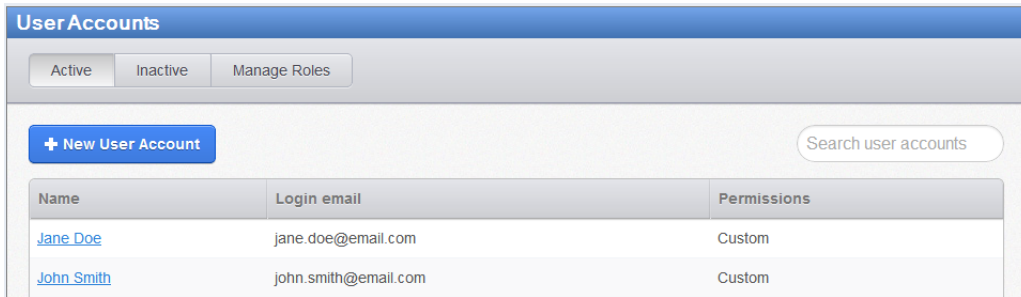
1. Login to the main **Kareo** application.



2. Select the menu item Settings > User Accounts.



3. Click on the User Account to grant API access.



4. Within the **Permissions** configuration, select the **EHRs & API** permission and click the **Full Control** checkbox.

User Accounts

General Permissions Practices

What permissions should this user have?

Account Administrator *(user has access to everything)*

Custom *(you customize their permissions)*

Predefined roles: Administrator Biller Billing Manager Office Manager Provider Scheduler

	Full Control
Accounting	<input type="checkbox"/>
Appointments	<input type="checkbox"/>
Audit log	<input type="checkbox"/>
Claims	<input type="checkbox"/>
Clearinghouse Report	<input type="checkbox"/>
Codes	<input type="checkbox"/>
Contracts & Fees	<input type="checkbox"/>
EHRs & API	<input checked="" type="checkbox"/>
Encounters	<input type="checkbox"/>

5. Click the **Save** button to save your changes to this **User Account**.

3. Using the Kareo Web Services API

The topics in this chapter explain how to use the Kareo Web Services API. You'll learn how to connect to the Kareo web service, how to create the RequestHeader object used in all service calls, how to parse the ErrorResponse and SecurityResponse objects returned by all service calls, and finally, you'll create test applications that access the API using popular software development tools including Microsoft Visual Studio 2008 and Microsoft Visual Studio 2005.

3.1 Introducing the Kareo Web Services API

The Kareo Web Services API provides object schemas that can be downloaded into popular development tools and enables developers to use structured objects for the request and response data used by each operation.

3.2 Connecting to the Kareo Web Services API

Kareo Web Services API is exposed as a web service that is located at the URL below.

```
https://webservice.kareo.com/services/soap/2.1/
```

3.3 The RequestHeader object

The RequestHeader object is required in every call to our services. This object contains the following fields:

- ClientVersion – This is an optional field that identifies the name and version of your application.
- CustomerKey – This is the customer key associated with your Kareo account (see Section 2.1 Getting Your Customer Key for more info).
- User - This is the login for an authorized user account in Kareo.
- Password – This is the password for an authorized user account in Kareo.

Here is an example of creating the request object in Microsoft C# after you have made a service reference to the API (described later in this chapter):

```
RequestHeader requestHeader = new RequestHeader();  
requestHeader.ClientVersion = "**Your Client Version Here**";  
requestHeader.CustomerKey = "**Customer Key Here**";  
requestHeader.User = "**User Name here**";  
requestHeader.Password = "**Password Here**";
```

3.4 The ErrorResponse object

The ErrorResponse object is returned in the response to every call to our services. This object contains the following fields:

- IsError – This indicates whether or not there was an error with the call to the Kareo service.
- ErrorMessage – This contains an error message when IsError is true.
- StackTrace – This occasionally contains additional information when IsError is true.

3.5 The SecurityResponse object

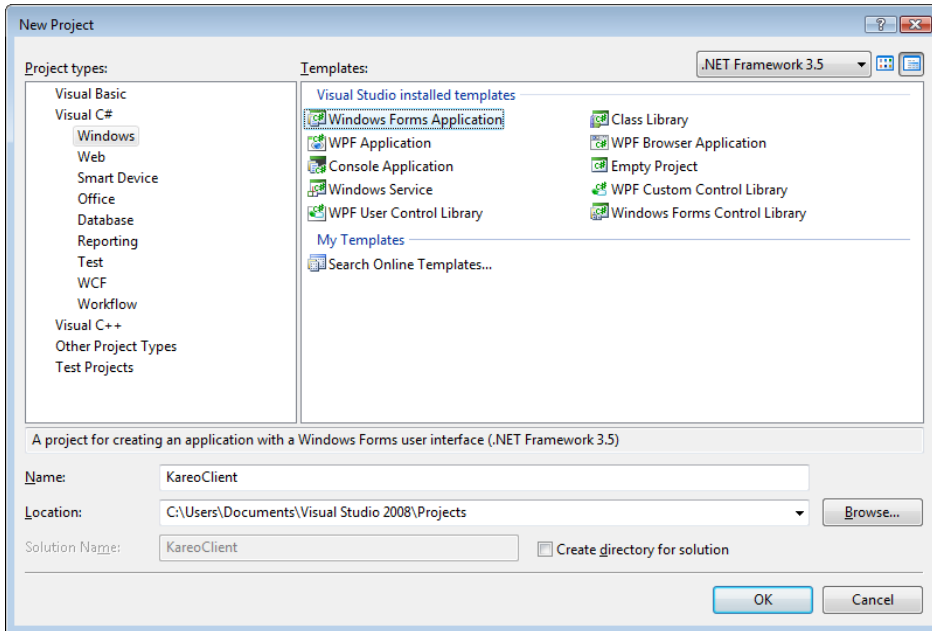
The SecurityResponse object is returned in the response to every call to our services (except in some cases when there is an error). This object contains the following fields:

- SecurityResultSuccess – This indicates whether or not the security check was a success. False would indicate that there was an issue with security.
- SecurityResult – This contains a message that has more detail on the results of the security check.
- Authenticated – Returns true if the login and password was valid.
- Authorized – Returns true if the user is authorized to perform the operation.
- CustomerId – Returns the unique identifier of the customer's account.
- PracticesAuthorized – Returns an array of practices the user has access to.
- PermissionsMissing – Returns an array of the permissions missing to execute the request.

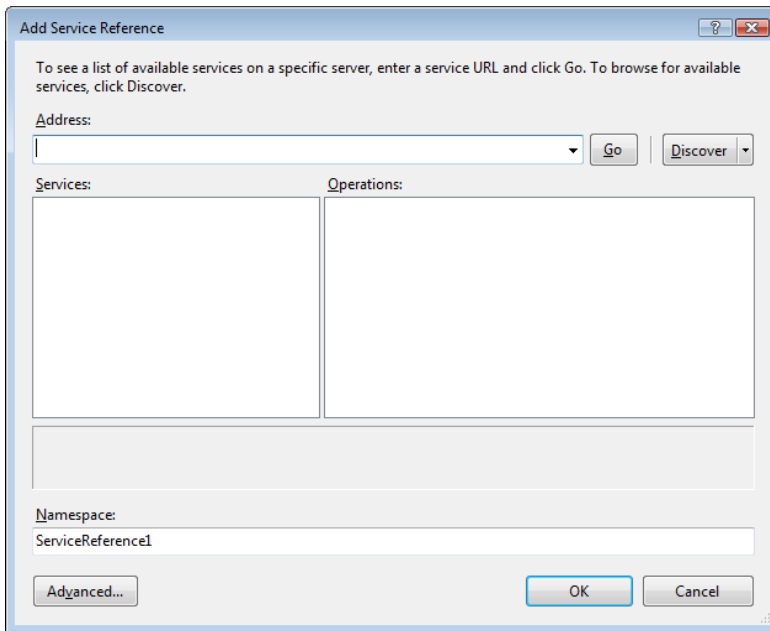
3.6 Creating a C# Application Using the Kareo Web Services API with Visual Studio 2008

This topic shows how to create C# Windows application using Microsoft Visual Studio 2008 to access the API.

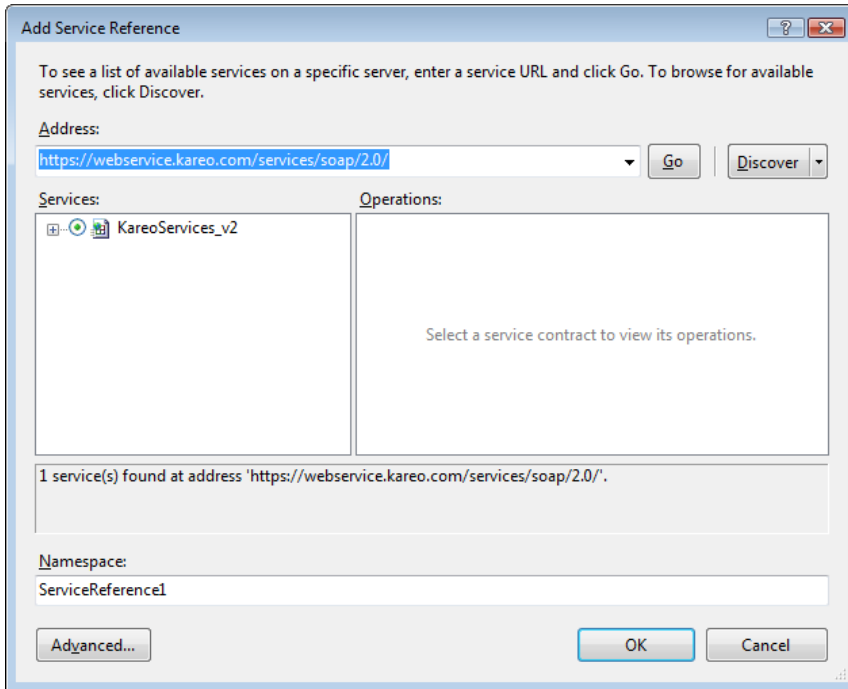
1. Start **Microsoft Visual Studio 2008** and create a new C# Windows application project named **“KareoClient”**.



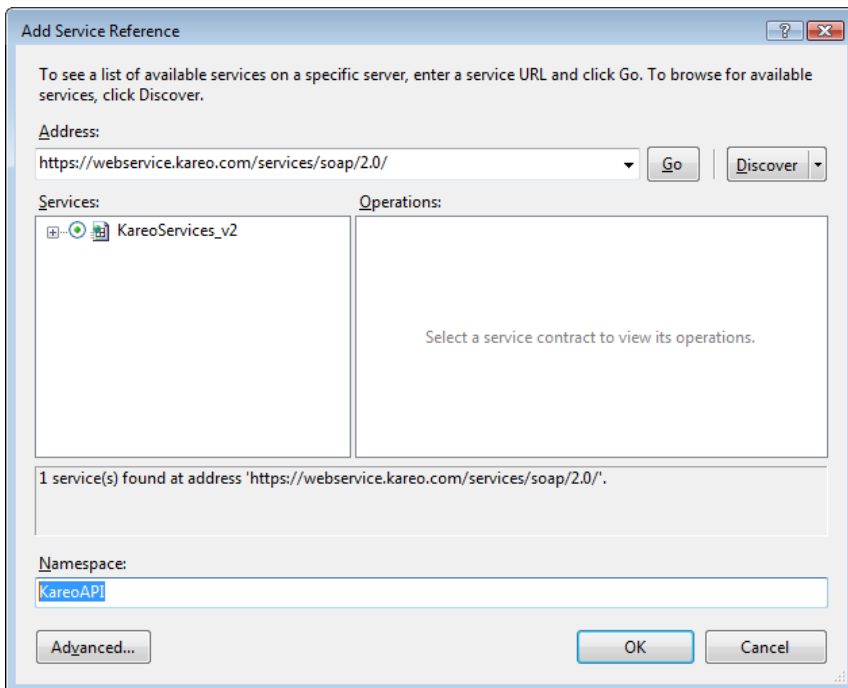
2. From the Project menu select **Add Service Reference**



3. Type into the Address box <https://webservice.kareo.com/services/soap/2.1/> and click **Go**.



4. Type in **KareoAPI** in the Namespace field and click **OK**.



Visual Studio 2008 has now generated a class that will allow you to make calls to the Kareo Web Service using the Kareo Web Services API.

5. Double-click on the form in the design view to display Form1.cs and paste the following code:

```

using System;
using System.Windows.Forms;

using KareoClient.KareoAPI;

namespace KareoClient
{
    public partial class Form1 : Form
    {
        const string CLIENTVERSION = "***Your Client Version Here**";
        const string CUSTOMERKEY = "***Customer Key Here**";
        const string USER = "***User Name here**";
        const string PASSWORD = "***Password Here**";

        public Form1()
        {
            InitializeComponent();
        }

        private void Form1_Load(object sender, EventArgs e)
        {
            CallKareoService();
        }

        private void CallKareoService()
        {
            KareoServicesClient service = new KareoServicesClient();

            // Create the request header that is required for every call to the Kareo Service
            RequestHeader requestHeader = new RequestHeader();
            requestHeader.CustomerKey = CUSTOMERKEY;
            requestHeader.User = USER;
            requestHeader.Password = PASSWORD;

            // Create the filter for the GetPatients call
            PatientFilter filter = new PatientFilter();
            filter.PracticeName = "test practice";
            filter.FullName = "frank jones";

            // Set the fields you want populated in the return by marking them as true
            PatientFieldsToReturn fields = new PatientFieldsToReturn();
            fields.ID = true;
            fields.PracticeName = true;
            fields.PatientFullName = true;

            // Create the GetPatientsRequest object with the request information
            GetPatientsRequest request = new GetPatientsRequest();
            request.RequestHeader = requestHeader;
            request.Filter = filter;
            request.Fields = fields;

            // This actually calls the Kareo Service passing in the parameters for the request
            GetPatientsResponse response = service.GetPatients(request);

            // Check the response for an error
            if (response.ErrorResponse.IsError)
                System.Diagnostics.Trace.WriteLine(response.ErrorResponse.ErrorMessage);
            else if (!response.SecurityResponse.SecurityResultSuccess)
                System.Diagnostics.Trace.WriteLine(response.SecurityResponse.SecurityResult);
            else
            {
                // There was no error print out the data
                foreach (PatientData p in response.Patients)
                {
                    System.Diagnostics.Trace.WriteLine(p.PatientFullName);
                }
            }
        }
    }
}

```

6. Run the client, click on the button. The response will be displayed in the output window.

3.7 Create Patient with Patient Case and Insurance Policy Example with Visual Studio 2008

```
private void CreatePatientExample()
{
    KareoServicesClient service = new KareoServicesClient();

    // Create the request header that is required for every call to the Kareo Service
    RequestHeader requestHeader = new RequestHeader();
    requestHeader.ClientVersion = CLIENTVERSION;
    requestHeader.CustomerKey = CUSTOMERKEY;
    requestHeader.User = USER;
    requestHeader.Password = PASSWORD;

    // You can find the objects to use by looking at the Object column in the section
    // "Understanding the Operations" for the appropriate operation.

    // Create the patient to insert.
    PatientCreate newPatient = new PatientCreate();
    newPatient.FirstName = "Frank";
    newPatient.LastName = "Jones";

    // Set the practice we want to add this patient to
    PracticeIdentifierReq practice = new PracticeIdentifierReq();
    practice.PracticeName = "American Medicine Associates";

    // Create the employer for the patient
    PatientEmployerReq employer = new PatientEmployerReq();
    employer.EmployerName = "Kareo Inc";

    // Create the case details for the patient
    PatientCaseCreateReq patientCase = new PatientCaseCreateReq();
    patientCase.CaseName = "Primary Case";
    patientCase.ReferringProviderFullName = "Jamie Richmond";

    // Create the insurance policies for the patient case
    InsurancePolicyCreateReq primaryPolicy = new InsurancePolicyCreateReq();
    primaryPolicy.PlanName = "BC/BS of California";
    primaryPolicy.PolicyNumber = "BCCA2938";
    primaryPolicy.PolicyGroupNumber = "38827211";
    primaryPolicy.Copay = "15";

    InsurancePolicyCreateReq secondaryPolicy = new InsurancePolicyCreateReq();
    secondaryPolicy.PlanName = "Railroad Insurance";
    secondaryPolicy.PolicyNumber = "RR2333";
    secondaryPolicy.PolicyGroupNumber = "449889";

    patientCase.Policies = new InsurancePolicyCreateReq[] { primaryPolicy, secondaryPolicy };

    // Make sure you set the patient's practice and employer (and any other objects you
    // create relating to the patient)
    newPatient.Practice = practice;
    newPatient.Employer = employer;
    newPatient.Cases = new PatientCaseCreateReq[] { patientCase };

    // Create the create patient request object
    CreatePatientRequest request = new CreatePatientRequest();
    request.RequestHeader = requestHeader;
    request.Patient = newPatient;

    // Call the Create Patient method
    ModifyPatientResponse response = service.CreatePatient(request);

    // Check the response for an error
    if (response.ErrorResponse.IsError)
        System.Diagnostics.Trace.WriteLine(response.ErrorResponse.ErrorMessage);
    else if (!response.SecurityResponse.SecurityResultSuccess)
        System.Diagnostics.Trace.WriteLine(response.SecurityResponse.SecurityResult);
}
```

3.8 Update Existing Patient and Insurance Policy Example with Visual Studio 2008

```
private void UpdatePatientExample()
```

```

{
    KareoServicesClient service = new KareoServicesClient();

    // Create the request header that is required for every call to the Kareo Service
    RequestHeader requestHeader = new RequestHeader();
    requestHeader.ClientVersion = CLIENTVERSION;
    requestHeader.CustomerKey = CUSTOMERKEY;
    requestHeader.User = USER;
    requestHeader.Password = PASSWORD;

    // You can find the objects to use by looking at the Object column in the section
    // "Understanding the Operations" for the appropriate operation.

    // Create the patient to update.
    PatientUpdate existingPatient = new PatientUpdate();
    existingPatient.FirstName = "Frank";
    existingPatient.LastName = "Jones";

    // Add the date of birth
    existingPatient.DateOfBirth = new DateTime(1956, 3, 8); // Adding a date of birth

    // Add the primary care physician
    PhysicianIdentifierReq pcp = new PhysicianIdentifierReq();
    pcp.FullName = "Sara Trivison";

    // Set the practice this patient belongs to
    PracticeIdentifierReq practice = new PracticeIdentifierReq();
    practice.PracticeName = "American Medicine Associates";

    // Deactivate the existing Patient Case named Primary Case
    PatientCaseUpdateReq existingCase = new PatientCaseUpdateReq();
    existingCase.CaseName = "Primary Case";
    existingCase.Active = false;

    // Create a Patient Case named Secondary Case
    PatientCaseUpdateReq newCase = new PatientCaseUpdateReq();
    newCase.CaseName = "Secondary Case";

    InsurancePolicyUpdateReq primaryPolicyNewCase = new InsurancePolicyUpdateReq();
    primaryPolicyNewCase.PlanName = "BC/BS of California";
    primaryPolicyNewCase.PolicyNumber = "BCCA4875";
    primaryPolicyNewCase.Copay = "25";

    newCase.Policies = new InsurancePolicyUpdateReq[] { primaryPolicyNewCase };

    // Make sure you set the patient's practice (and any other objects you
    // create relating to the patient)
    existingPatient.Practice = practice;
    existingPatient.PrimaryCarePhysician = pcp;
    existingPatient.Cases = new PatientCaseUpdateReq[] { existingCase, newCase };

    // Create the create patient request object
    UpdatePatientRequest request = new UpdatePatientRequest();
    request.RequestHeader = requestHeader;
    request.Patient = existingPatient;

    // Call the Create Patient method
    ModifyPatientResponse response = service.UpdatePatient(request);

    // Check the response for an error
    if (response.ErrorResponse.IsError)
        System.Diagnostics.Trace.WriteLine(response.ErrorResponse.ErrorMessage);
    else if (!response.SecurityResponse.SecurityResultSuccess)
        System.Diagnostics.Trace.WriteLine(response.SecurityResponse.SecurityResult);
}

```

3.9 Create Encounter Example with Visual Studio 2008

```

private void CreateEncounterExample()
{
    KareoServicesClient service = new KareoServicesClient();

```

```

// Create the request header that is required for every call to the Kareo Service
RequestHeader requestHeader = new RequestHeader();
requestHeader.ClientVersion = CLIENTVERSION;
requestHeader.CustomerKey = CUSTOMERKEY;
requestHeader.User = USER;
requestHeader.Password = PASSWORD;

// You can find the objects to use by looking at the Object column in the section
// "Understanding the Operations" for the appropriate operation.

// Create the encounter to insert.
EncounterCreate newEncounter = new EncounterCreate();
newEncounter.ServiceStartDate = DateTime.Today.AddDays(-1);
newEncounter.PostDate = DateTime.Today;

// Set the practice we want to add this encounter to
PracticeIdentifierReq practice = new PracticeIdentifierReq();
practice.PracticeName = "American Medicine Associates";

// Set the service location
EncounterServiceLocation location = new EncounterServiceLocation();
location.LocationName = "Irvine Office";

// Create the patient for the encounter
PatientIdentifierReq patient = new PatientIdentifierReq();
patient.FirstName = "Frank";
patient.LastName = "Jones";

// Create the patient case for the encounter
PatientCaseIdentifierReq encounterCase = new PatientCaseIdentifierReq();
encounterCase.CaseName = "Secondary Case";

// Create the rendering provider for the encounter
ProviderIdentifierDetailedReq provider = new ProviderIdentifierDetailedReq();
provider.FirstName = "Paige";
provider.LastName = "McAndrews";

// Create the service lines for this encounter
ServiceLineReq serviceLine1 = new ServiceLineReq();
serviceLine1.ServiceStartDate = DateTime.Today.AddDays(-1);
serviceLine1.ProcedureCode = "99201";
serviceLine1.DiagnosisCode1 = "600.00";
serviceLine1.Units = 1;
serviceLine1.UnitCharge = 3.4;

ServiceLineReq serviceLine2 = new ServiceLineReq();
serviceLine2.ServiceStartDate = DateTime.Today.AddDays(-1);
serviceLine2.ProcedureCode = "62311";
serviceLine2.DiagnosisCode1 = "495.4";
serviceLine2.Units = 2;
serviceLine2.UnitCharge = 6.5;

// Make sure you set the encounter's practice, service location, patient, case, and
// provider (and any other objects you create relating to the encounter)
newEncounter.Practice = practice;
newEncounter.ServiceLocation = location;
newEncounter.Patient = patient;
newEncounter.Case = encounterCase;
newEncounter.RenderingProvider = provider;
newEncounter.ServiceLines = new ServiceLineReq[] { serviceLine1, serviceLine2 };

// Create the create encounter request object
CreateEncounterRequest request = new CreateEncounterRequest();
request.RequestHeader = requestHeader;
request.Encounter = newEncounter;

// Call the Create Encounter method
CreateEncounterResponse response = service.CreateEncounter(request);

// Check the response for an error
if (response.ErrorResponse.IsError)
    System.Diagnostics.Trace.WriteLine(response.ErrorResponse.ErrorMessage);
else if (!response.SecurityResponse.SecurityResultSuccess)

```

```

        System.Diagnostics.Trace.WriteLine(response.SecurityResponse.SecurityResult);
    }
}

```

3.10 Notes when using the Kareo Web Services API with Visual Studio 2008

You might need to modify your app.config (or web.config) file when accessing large amounts of data from the API

- Modify the **maxBufferSize** and **maxReceivedMessageSize** attributes in the //configuration/system.serviceModel/bindings/basicHttpBinding/binding element to a number larger than the default of 65336 (which is 64 kilobytes). To set this to accept data up to 10 megabytes change the attributes to 10485760
- Modify the **maxStringContentLength** and **maxNameTableCharCount** attributes in the //configuration/system.serviceModel/bindings/basicHttpBinding/binding/readerQuotas element to a number larger than the default of 8192 (which is 8 kilobytes) and 16384 respectively. To set this to accept values in the response up to 10 megabytes change the attribute to 10485760
- You may need to add a new behavior to your config file copy and paste the xml snippet below this after the bindings element (right after </bindings>):

```

<behaviors>
  <endpointBehaviors>
    <behavior name="KareoServicesBehavior">
      <dataContractSerializer maxItemsInObjectGraph="2147483647" />
    </behavior>
  </endpointBehaviors>
</behaviors>

```

You will also need to add a reference to this new binding behavior in your endpoint configuration (see the highlighted section below):

```

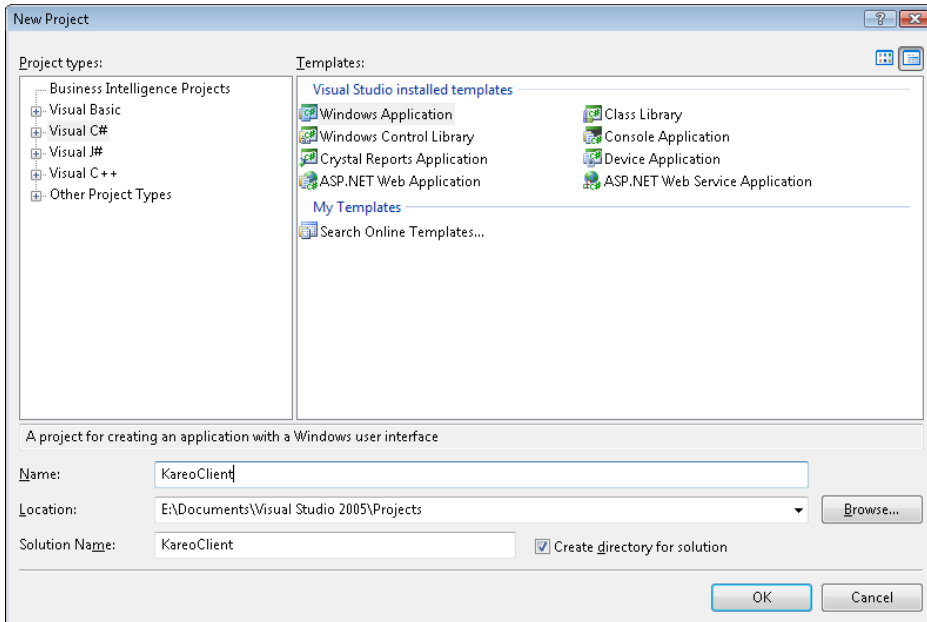
<client>
  <endpoint address="https://webservice.kareo.com/services/soap/2.1/KareoServices.svc"
    behaviorConfiguration="KareoServicesBehavior"
    binding="basicHttpBinding" bindingConfiguration="BasicHttpBinding_KareoServices"
    contract="ServiceReference1.KareoServices" name="BasicHttpBinding_KareoServices" />
</client>

```

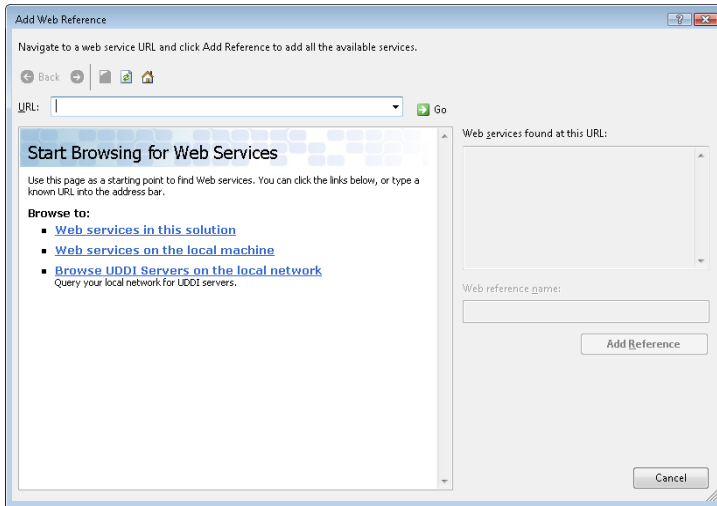
3.11 Creating a C# Application Using the Kareo Web Services API with Visual Studio 2005

This topic shows how to create C# Windows application using Microsoft Visual Studio 2005 to access the API.

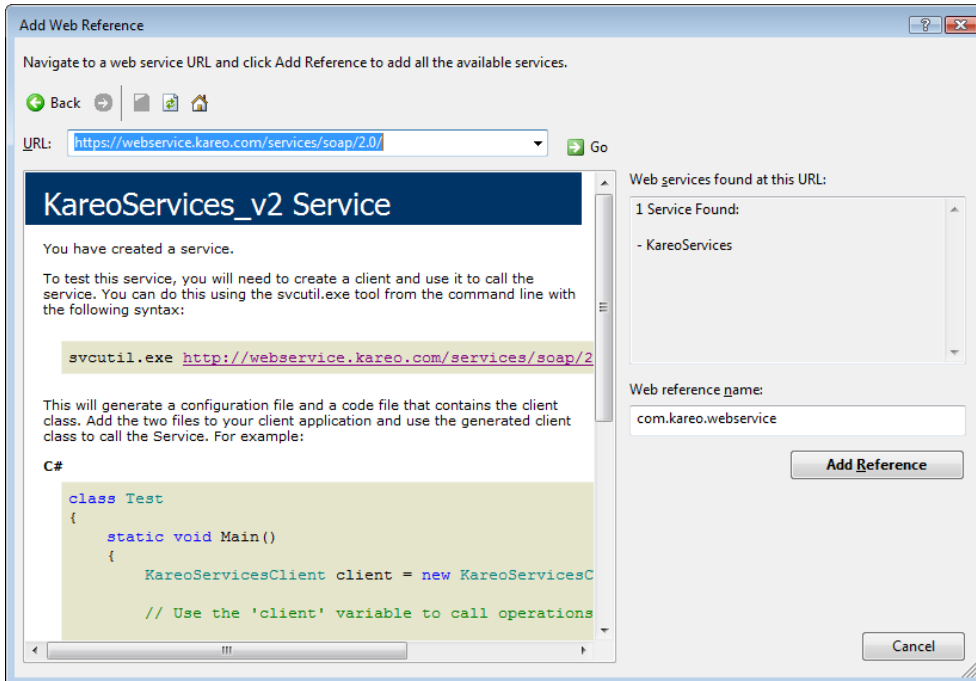
1. Start **Microsoft Visual Studio 2005** and create a new C# Windows application project named **"KareoClient"**.



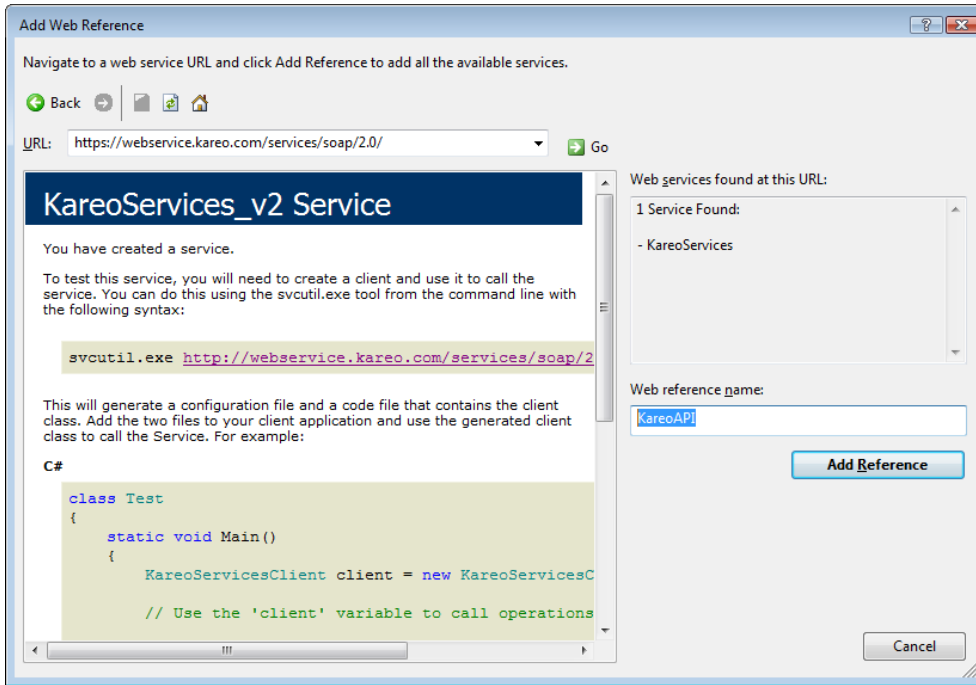
2. From the Project menu select **Add Web Reference**



3. Type into the URL box <https://webservice.kareo.com/services/soap/2.1/> and click **Go**



4. Type in **KareoAPI** in the Web reference name field and click **Add Reference**.



Visual Studio 2005 has now generated a class that will allow you to make calls to the Kareo Web Service using the Kareo Web Services API.

6. Double-click on the form in the design view to display Form1.cs and paste the following code:


```

using System;
using System.Windows.Forms;

using KareoClient.KareoAPI;

namespace KareoClient
{
    public partial class Form1 : Form
    {
        const string CLIENTVERSION = "***Your Client Version Here**";
        const string CUSTOMERKEY = "***Customer Key Here**";
        const string USER = "***User Name here**";
        const string PASSWORD = "***Password Here**";

        public Form1()
        {
            InitializeComponent();
        }

        private void Form1_Load(object sender, EventArgs e)
        {
            CallKareoService();
        }

        private void CallKareoService()
        {
            KareoServices v2 service = new KareoServices v2();

            // Create the request header that is required for every call to the Kareo Service
            RequestHeader requestHeader = new RequestHeader();
            requestHeader.ClientVersion = CLIENTVERSION;
            requestHeader.CustomerKey = CUSTOMERKEY;
            requestHeader.User = USER;
            requestHeader.Password = PASSWORD;

            // Create the filter for the GetPatients call
            PatientFilter filter = new PatientFilter();
            filter.PracticeName = "test practice";
            filter.FullName = "frank jones";

            // Set the fields you want populated in the return by marking them as true
            PatientFieldsToReturn fields = new PatientFieldsToReturn();
            fields.ID = true;
            fields.IDSpecified = true; // When using VS 2005 you need to set this
            fields.PracticeName = true;
            fields.PracticeNameSpecified = true; // When using VS 2005 you need to set this
            fields.PatientFullName = true;
            fields.PatientFullNameSpecified = true; // When using VS 2005 you need to set this

            // Create the GetPatientsRequest object with the request information
            GetPatientsRequest request = new GetPatientsRequest();
            request.RequestHeader = requestHeader;
            request.Filter = filter;
            request.Fields = fields;

            // This actually calls the Kareo Service passing in the parameters for the request
            GetPatientsResponse response = service.GetPatients(request);

            // Check the response for an error
            if (response.ErrorResponse.IsError)
                System.Diagnostics.Trace.WriteLine(response.ErrorResponse.ErrorMessage);
            else if (!response.SecurityResponse.SecurityResultSuccess)
                System.Diagnostics.Trace.WriteLine(response.SecurityResponse.SecurityResult);
            else
            {
                // There was no error print out the data
                foreach (PatientData p in response.Patients)
                {
                    System.Diagnostics.Trace.WriteLine(p.PatientFullName);
                }
            }
        }
    }
}

```

3.12 Create Patient with Patient Case and Insurance Policy Example with Visual Studio 2005

```
private void CreatePatientExample()
{
    KareoServices_v2 service = new KareoServices_v2();

    // Create the request header that is required for every call to the Kareo Service
    RequestHeader requestHeader = new RequestHeader();
    requestHeader.ClientVersion = CLIENTVERSION;
    requestHeader.CustomerKey = CUSTOMERKEY;
    requestHeader.User = USER;
    requestHeader.Password = PASSWORD;

    // You can find the objects to use by looking at the Object column in the section
    // "Understanding the Operations" for the appropriate operation.

    // Create the patient to insert.
    PatientCreate newPatient = new PatientCreate();
    newPatient.FirstName = "Frank";
    newPatient.LastName = "Jones";

    // Set the practice we want to add this patient to
    PracticeIdentifierReq practice = new PracticeIdentifierReq();
    practice.PracticeName = "American Medicine Associates";

    // Create the employer for the patient
    PatientEmployerReq employer = new PatientEmployerReq();
    employer.EmployerName = "Kareo Inc";

    // Create the case details for the patient
    PatientCaseCreateReq patientCase = new PatientCaseCreateReq();
    patientCase.CaseName = "Primary Case";
    patientCase.ReferringProviderFullName = "Jamie Richmond";

    // Create the insurance policies for the patient case
    InsurancePolicyCreateReq primaryPolicy = new InsurancePolicyCreateReq();
    primaryPolicy.PlanName = "BC/BS of California";
    primaryPolicy.PolicyNumber = "BCCA2938";
    primaryPolicy.PolicyGroupNumber = "38827211";
    primaryPolicy.Copay = "15";

    InsurancePolicyCreateReq secondaryPolicy = new InsurancePolicyCreateReq();
    secondaryPolicy.PlanName = "Railroad Insurance";
    secondaryPolicy.PolicyNumber = "RR2333";
    secondaryPolicy.PolicyGroupNumber = "449889";

    patientCase.Policies = new InsurancePolicyCreateReq[] { primaryPolicy, secondaryPolicy };

    // Make sure you set the patient's practice and employer (and any other objects you
    // create relating to the patient)
    newPatient.Practice = practice;
    newPatient.Employer = employer;
    newPatient.Cases = new PatientCaseCreateReq[] { patientCase };

    // Create the create patient request object
    CreatePatientRequest request = new CreatePatientRequest();
    request.RequestHeader = requestHeader;
    request.Patient = newPatient;

    // Call the Create Patient method
    ModifyPatientResponse response = service.CreatePatient(request);

    // Check the response for an error
    if (response.ErrorResponse.IsError)
        System.Diagnostics.Trace.WriteLine(response.ErrorResponse.ErrorMessage);
    else if (!response.SecurityResponse.SecurityResultSuccess)
        System.Diagnostics.Trace.WriteLine(response.SecurityResponse.SecurityResult);
}
}
```

3.13 Update Existing Patient and Insurance Policy Example with Visual Studio 2005

```
private void UpdatePatientExample()
```

```

{
    KareoServices_v2 service = new KareoServices_v2();

    // Create the request header that is required for every call to the Kareo Service
    RequestHeader requestHeader = new RequestHeader();
    requestHeader.ClientVersion = CLIENTVERSION;
    requestHeader.CustomerKey = CUSTOMERKEY;
    requestHeader.User = USER;
    requestHeader.Password = PASSWORD;

    // You can find the objects to use by looking at the Object column in the section
    // "Understanding the Operations" for the appropriate operation.

    // Create the patient to update.
    PatientUpdate existingPatient = new PatientUpdate();
    existingPatient.FirstName = "Frank";
    existingPatient.LastName = "Jones";

    // Add the date of birth

    // **NOTE** the Specified fields need to be set for some fields! Visual Studio 2008
    // does not have this quirk!
    existingPatient.DateOfBirth = new DateTime(1956, 3, 8); // Adding a date of birth
    existingPatient.DateOfBirthSpecified = true;

    // Add the primary care physician
    PhysicianIdentifierReq pcp = new PhysicianIdentifierReq();
    pcp.FullName = "Sara Trivison";

    // Set the practice this patient belongs to
    PracticeIdentifierReq practice = new PracticeIdentifierReq();
    practice.PracticeName = "American Medicine Associates";

    // Deactivate the existing Patient Case named Primary Case
    PatientCaseUpdateReq existingCase = new PatientCaseUpdateReq();
    existingCase.CaseName = "Primary Case";

    // **NOTE** the Specified fields need to be set for some fields! Visual Studio 2008
    // does not have this quirk!
    existingCase.Active = false;
    existingCase.ActiveSpecified = true;

    // Create a Patient Case named Secondary Case
    PatientCaseUpdateReq newCase = new PatientCaseUpdateReq();
    newCase.CaseName = "Secondary Case";

    InsurancePolicyUpdateReq primaryPolicyNewCase = new InsurancePolicyUpdateReq();
    primaryPolicyNewCase.PlanName = "BC/BS of California";
    primaryPolicyNewCase.PolicyNumber = "BCCA4875";
    primaryPolicyNewCase.Copay = "25";

    newCase.Policies = new InsurancePolicyUpdateReq[] { primaryPolicyNewCase };

    // Make sure you set the patient's practice (and any other objects you
    // create relating to the patient)
    existingPatient.Practice = practice;
    existingPatient.PrimaryCarePhysician = pcp;
    existingPatient.Cases = new PatientCaseUpdateReq[] { existingCase, newCase };

    // Create the create patient request object
    UpdatePatientRequest request = new UpdatePatientRequest();
    request.RequestHeader = requestHeader;
    request.Patient = existingPatient;

    // Call the Create Patient method
    ModifyPatientResponse response = service.UpdatePatient(request);

    // Check the response for an error
    if (response.ErrorResponse.IsError)
        System.Diagnostics.Trace.WriteLine(response.ErrorResponse.ErrorMessage);
    else if (!response.SecurityResponse.SecurityResultSuccess)
        System.Diagnostics.Trace.WriteLine(response.SecurityResponse.SecurityResult);
}

```

3.14 Create Encounter Example with Visual Studio 2005

```
private void CreateEncounterExample()
{
    KareoServices_v2 service = new KareoServices_v2();

    // Create the request header that is required for every call to the Kareo Service
    RequestHeader requestHeader = new RequestHeader();
    requestHeader.ClientVersion = CLIENTVERSION;
    requestHeader.CustomerKey = CUSTOMERKEY;
    requestHeader.User = USER;
    requestHeader.Password = PASSWORD;

    // You can find the objects to use by looking at the Object column in the section
    // "Understanding the Operations" for the appropriate operation.

    // Create the encounter to insert.
    EncounterCreate newEncounter = new EncounterCreate();
    newEncounter.ServiceStartDate = DateTime.Today.AddDays(-1);
    newEncounter.PostDate = DateTime.Today;

    // **NOTE** the Specified fields need to be set for some fields! Visual Studio 2008
    // does not have this quirk!
    newEncounter.ServiceEndDateSpecified = true;
    newEncounter.PostDateSpecified = true;

    // Set the practice we want to add this encounter to
    PracticeIdentifierReq practice = new PracticeIdentifierReq();
    practice.PracticeName = "American Medicine Associates";

    // Set the service location
    EncounterServiceLocation location = new EncounterServiceLocation();
    location.LocationName = "Irvine Office";

    // Create the patient for the encounter
    PatientIdentifierReq patient = new PatientIdentifierReq();
    patient.FirstName = "Frank";
    patient.LastName = "Jones";

    // Create the patient case for the encounter
    PatientCaseIdentifierReq encounterCase = new PatientCaseIdentifierReq();
    encounterCase.CaseName = "Secondary Case";

    // Create the rendering provider for the encounter
    ProviderIdentifierDetailedReq provider = new ProviderIdentifierDetailedReq();
    provider.FirstName = "Paige";
    provider.LastName = "McAndrews";

    // Create the service lines for this encounter
    ServiceLineReq serviceLine1 = new ServiceLineReq();
    serviceLine1.ServiceStartDate = DateTime.Today.AddDays(-1);
    serviceLine1.ProcedureCode = "99201";
    serviceLine1.DiagnosisCode1 = "600.00";
    serviceLine1.Units = 1;
    serviceLine1.UnitCharge = 3.4;

    // **NOTE** the Specified fields need to be set for some fields! Visual Studio 2008
    // does not have this quirk!
    serviceLine1.UnitsSpecified = true;
    serviceLine1.UnitChargeSpecified = true;

    ServiceLineReq serviceLine2 = new ServiceLineReq();
    serviceLine2.ServiceStartDate = DateTime.Today.AddDays(-1);
    serviceLine2.ProcedureCode = "62311";
    serviceLine2.DiagnosisCode1 = "495.4";
    serviceLine2.Units = 2;
    serviceLine2.UnitCharge = 6.5;

    // **NOTE** the Specified fields need to be set for some fields! Visual Studio 2008
    // does not have this quirk!
```

```

serviceLine2.UnitsSpecified = true;
serviceLine2.UnitChargeSpecified = true;

// Make sure you set the encounter's practice, service location, patient, case, and
// provider (and any other objects you create relating to the encounter)
newEncounter.Practice = practice;
newEncounter.ServiceLocation = location;
newEncounter.Patient = patient;
newEncounter.Case = encounterCase;
newEncounter.RenderingProvider = provider;
newEncounter.ServiceLines = new ServiceLineReq[] { serviceLine1, serviceLine2 };

// Create the create encounter request object
CreateEncounterRequest request = new CreateEncounterRequest();
request.RequestHeader = requestHeader;
request.Encounter = newEncounter;

// Call the Create Encounter method
CreateEncounterResponse response = service.CreateEncounter(request);

// Check the response for an error
if (response.ErrorResponse.IsError)
    System.Diagnostics.Trace.WriteLine(response.ErrorResponse.ErrorMessage);
else if (!response.SecurityResponse.SecurityResultSuccess)
    System.Diagnostics.Trace.WriteLine(response.SecurityResponse.SecurityResult);
}

```

3.15 Notes when using the Kareo Web Services API with Visual Studio 2005

Setting properties in request objects may require an extra step of setting the xxxSpecified property to true

- Setting the value of value types (int and bool for example) may require setting an additional field to indicate that the value was specified. For example in the sample code the PatientFieldsToReturn object has some bool properties set (ID, PracticeName, PatientFullName). In order to get these to go through the additional field that ends with Specified also needs to be set to true.
- When setting a property check to see if there is an additional property of the same name with a suffix of Specified and set it to true.
- This extra step does not have to be done when developing against the Kareo Web Services API using Visual Studio 2008

4. General Guidelines on consuming the Kareo API

This topic provides general guidelines on best practices when consuming the Kareo web services API.

4.1 Only return fields you intend to use in the Get operations

Most of the request objects for our Get operations accept a parameter named Fields that will take in a FieldsToReturn object specific to that call. An example would be the GetAppointmentsReq object has a field named Fields that takes the AppointmentFieldsToReturn object.

The FieldsToReturn object allows you to indicate which fields you are interested in from the call. The more precise you are with this the smaller the response will be from our API reducing the bandwidth required to complete the call.

Here is a code snippet of setting a FieldsToReturn object:

```
GetAppointmentsReq Request = new GetAppointmentsReq();
Request.Fields = new AppointmentFieldsToReturn()
{
    ID = true,
    StartDate = true,
    EndDate = true,
    PracticeID = true,
    PatientFullName = true
};
```

4.2 Filter as much as possible in the Get operations

Most of the request objects for our Get operations accept a parameter named Filter that will take in a Filter object specific to that call. An example would be the GetPatientsReq object has a field named Filter that takes the PatientFilter object.

The Filter object allows you to limit the number of rows returned from the call. The more precise you are with this the smaller the response will be from our API reducing the bandwidth and processing time required to complete the call.

Here is a code snippet of setting a Filter object:

```
GetPatientsReq Request = new GetPatientsReq();
Request.Filter = new PatientFilter()
{
    FirstName = "John",
    LastName = "Smith",
    SSN = "111110004"
};
```

4.3 Try to avoid polling if possible and when polling try not to poll too frequently

This is a general guideline to try and poll as infrequently as possible (ie every 2 hours instead of every 5 minutes) to reduce overall load on our systems especially in scenarios where most calls return nothing new to process. In general please fine tune your calls using the two suggestions above to have your call return in an acceptable amount of time. Please note that if we do notice polling occurring too often and taking up resources we may begin to reject or throttle your requests.

4.4 Query our API during the off hours when possible

If it is not critical to run your integration with the Kareo web services API during office hours consider scheduling it during the off hours. The performance of our API will generally be better during the off hours.

5. Understanding the Operations

This topic provides a detailed definition of the operations that can be performed with Kareo web services API.

5.1 Get Appointments

This operation returns a list of appointments that match the criteria included within the request.

5.1.1 The Request

The following information may be provided as parameters to the request for this operation.

Parameter	Description	Required
CustomerKey	The customer key associated with your customer account with Kareo.	Yes
User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
FieldsToReturn	The list of fields to return for each appointment record.	No
PracticeName	The date the appointment was created.	Yes
FromCreatedDate	The starting date the appointment was created.	No
ToCreatedDate	The ending date the appointment was created.	No
FromLastModifiedDate	The starting date the appointment was last modified.	No
ToLastModifiedDate	The ending date the appointment was last modified.	No
Type	The type of appointment.	No
ConfirmationStatus	The status of the appointment. Use one of these as a status to filter: Confirmed Check-in No-show Check-out Rescheduled Scheduled Cancelled	No
ServiceLocationName	The location of the appointment.	No
PatientID	The unique identifier for the patient related to this appointment.	No
PatientFullName	The full name of the patient related to this appointment.	No
PatientCasePayerScenario	The payer scenario for the case related to this appointment.	No
StartDate	The start date and time of this appointment. Note if StartDate is not provided the default will be 7 days prior to today's date, if StartDate and EndDate is not provided the default will be 3 days prior to today's date, if FromCreatedDate and ToCreatedDate or FromLastModifiedDate and ToLastModifiedDate is specified the StartDate is not overridden.	No
EndDate	The end date and time for this appointment. Note if EndDate is not provided the default will be 7 days from the start date, if FromCreatedDate and ToCreatedDate or FromLastModifiedDate and ToLastModifiedDate is specified the EndDate is not overridden.	No
AppointmentReason	The reason entered for this appointment.	No
TimeZoneOffsetFromGMT	The time zone offset from GMT of the client computer accessing the API.	No

5.1.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
ID	The unique identifier of the appointment.	Appointment details

CreatedDate	The date the appointment was created.	n/a
LastModifiedDate	The date the appointment was last modified.	n/a
PracticeName	The name of the practice related to this appointment.	Settings > Find Practice > Edit Practice
Type	The type of appointment; either "Patient" or "Other".	Appointment
ConfirmationStatus	The status of the appointment.	Appointment
ServiceLocationName	The location of the appointment.	Appointment
PatientID	The unique identifier for the patient related to this appointment.	Patient
PatientFullName	The full name of the patient related to this appointment.	Appointment
PatientCaseID	The unique identifier for the case related to this appointment.	n/a
PatientCaseName	The name of the case related to this appointment.	Appointment
PatientCasePayerScenario	The payer scenario for the case related to this appointment.	Patient > Case
AuthorizationID	The unique identifier for the authorization related to this appointment.	n/a
AuthorizationNumber	The authorization number related to this appointment.	Patient > Case > Insurance Policy > Authorizations
AuthorizationStartDate	The authorization start date related to this appointment.	Patient > Case > Insurance Policy > Authorizations
AuthorizationEndDate	The authorization end date related to this appointment.	Patient > Case > Insurance Policy > Authorizations
AuthorizationInsurancePlan	The insurance plan related to the authorization related to this appointment.	Patient > Case > Insurance Policy > Authorizations
StartDate	The start date and time of this appointment.	Appointment
EndDate	The end date and time for this appointment.	Appointment
AllDay	If this is an all day appointment, then true. Otherwise, false.	Appointment
Recurring	If this is a recurring appointment, then true. Otherwise, false.	Appointment
AppointmentReason 1	The first reason entered for this appointment.	Appointment
ResourceName1	The first provider or scheduling resource related to this appointment.	Appointment
Notes	The notes or comments related to this appointment.	Appointment
PracticeID	The unique identifier of the practice related to this appointment.	Settings > Find Practice > Edit Practice
AppointmentReason2	The second reason entered for this appointment.	Appointment
AppointmentReason3	The third reason entered for this appointment.	Appointment
AppointmentReason4	The fourth reason entered for this appointment.	Appointment
AppointmentReason5	The fifth reason entered for this appointment.	Appointment
AppointmentReason6	The sixth reason entered for this appointment.	Appointment
AppointmentReason7	The seventh reason entered for this appointment.	Appointment
AppointmentReason8	The eighth reason entered for this appointment.	Appointment
AppointmentReason9	The ninth reason entered for this appointment.	Appointment
AppointmentReason10	The tenth reason entered for this appointment.	Appointment
ResourceName2	The second provider or scheduling resource related to this appointment.	Appointment
ResourceName3	The third provider or scheduling resource related to this appointment.	Appointment
ResourceName4	The fourth provider or scheduling resource related to this appointment.	Appointment
ResourceName5	The fifth provider or scheduling resource related to this appointment.	Appointment
ResourceName6	The sixth provider or scheduling resource related to this appointment.	Appointment
ResourceName7	The seventh provider or scheduling resource related to this appointment.	Appointment
ResourceName8	The eighth provider or scheduling resource related to this appointment.	Appointment
ResourceName9	The ninth provider or scheduling resource related to this appointment.	Appointment

ResourceName10	The tenth provider or scheduling resource related to this appointment.	Appointment
----------------	--	-------------

5.2 Get Charges

This operation returns a list of charges that match the criteria included within the request.

5.2.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Required
CustomerKey	The customer key associated with your customer account with Kareo.	Yes
User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
FieldsToReturn	The list of fields to return for each appointment record.	No
PracticeName	The name of the practice related to this charge.	Yes
FromCreatedDate	The date the claim was created. Note if FromCreatedDate is not provided the default will be 7 days prior to ToCreatedDate.	No
ToCreatedDate	The date the claim was created. Note if ToCreatedDate is not provided the default will be 7 days from FromCreatedDate.	No
FromLastModifiedDate	The date the claim was last modified. Note if FromLastModifiedDate is not provided the default will be 7 days prior to ToLastModifiedDate.	No
ToLastModifiedDate	The date the claim was last modified. Note if ToLastModifiedDate is not provided the default will be 7 days from FromLastModifiedDate.	No
PatientName	The name of the patient related to this charge.	No
CasePayerScenario	The payer scenario of the case related to this charge.	No
FromServiceDate	The starting service date for charges. Note if FromServiceDate is not provided the default will be 7 days prior to ToServiceDate.	No
ToServiceDate	The ending service date for charges. Note if ToServiceDate is not provided the default will be 7 days from FromServiceDate.	No
FromPostingDate	The posting date of the encounter related to this charge. Note if FromPostingDate is not provided the default will be 7 days prior to ToPostingDate.	No
ToPostingDate	The posting date of the encounter related to this charge. Note if ToPostingDate is not provided the default will be 7 days from FromPostingDate.	No
BatchNumber	The batch number associated with the encounter related to this charge.	No
SchedulingProviderName	The name of the scheduling provider related to this charge.	No
RenderingProviderName	The name of the rendering provider related to this charge.	No
ReferringProviderName	The name of the referring physician related to this charge.	No
ServiceLocationName	The name of the service location related to this charge.	No
ProcedureCode	The procedure code related to this charge.	No
DiagnosisCode	The first diagnosis code related to this charge.	No
Status	The status of this charge.	No
BilledTo	The insurer or patient the charge to which the charge is currently assigned.	No
IncludeUnapprovedCharges	"T" to return charges associated with unapproved encounters.	No
EncounterStatus	The status of the encounter.	No

5.2.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
ID	The unique identifier of the claim.	Claim details
CreatedDate	The date the claim was created.	n/a
LastModifiedDate	The date the claim was last modified.	n/a
PracticeName	The name of the practice related to this charge.	Encounter
EncounterID	The unique identifier of the encounter related to this charge.	Encounter
PatientID	The unique identifier of the patient related to this charge.	Encounter
PatientName	The name of the patient related to this charge.	Encounter
PatientDateOfBirth	The date of birth of the patient related to this charge.	Encounter
CaseName	The name of the case related to this charge.	Encounter
CasePayerScenario	The payer scenario of the case related to this charge.	Patient > Case
ServiceStartDate	The service start date of this charge.	Encounter
ServiceEndDate	The service end date of this charge.	Encounter
PostingDate	The posting date of the encounter related to this charge.	Encounter
BatchNumber	The batch number associated with the encounter related to this charge.	Encounter
SchedulingProviderName	The name of the scheduling provider related to this charge.	Encounter
RenderingProviderName	The name of the rendering provider related to this charge.	Encounter
SupervisingProviderName	The name of the supervising provider related to this charge.	Encounter
ReferringProviderName	The name of the referring physician related to this charge.	Encounter
ServiceLocationName	The name of the service location related to this charge.	Encounter
ProcedureCode	The procedure code related to this charge.	Encounter
ProcedureName	The name of the procedure related to this charge.	Encounter
ProcedureCodeCategory	The category of the procedure related to this charge.	Encounter
ProcedureModifier1	The first modifier of the procedure related to this charge.	Encounter
ProcedureModifier2	The second modifier of the procedure related to this charge.	Encounter
ProcedureModifier3	The third modifier of the procedure related to this charge.	Encounter
ProcedureModifier4	The fourth modifier of the procedure related to this charge.	Encounter
DiagnosisCode1	The first diagnosis code related to this charge.	Encounter
DiagnosisCode2	The second diagnosis code related to this charge.	Encounter
DiagnosisCode3	The third diagnosis code related to this charge.	Encounter
DiagnosisCode4	The fourth diagnosis code related to this charge.	Encounter
Units	The number of units of the procedure related to this charge.	Encounter
UnitCharge	The unit charge of the procedure related to this charge.	Encounter
TotalCharges	The total charges related to this charge.	Encounter
AdjustedCharges	The total charges minus all adjustments related to this charge.	Claim
Receipts	The total payments applied to this charge.	Claim
PatientBalance	The patient balance related to this charge.	Claim
InsuranceBalance	The insurance balanced related to this charge.	Claim
TotalBalance	The total balance related to this charge.	Claim
PrimaryInsuranceBilledCompanyName	If primary payment posted by user, then this field is associated with the primary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the primary insurance policy on the case associated with the encounter.	Encounter
PrimaryInsuranceBilledPlanName	If primary payment posted by user, then this field is associated with the primary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the primary insurance policy on the case associated with the encounter.	Encounter

SecondaryInsuranceBilledCompanyName	If secondary payment posted by user, then this field is associated with the secondary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the secondary insurance policy on the case associated with the encounter.	Encounter
SecondaryInsuranceBilledPlanName	If secondary payment posted by user, then this field is associated with the secondary insurance policy as identified by user when posting the insurance payment. Otherwise, this field is associated with the secondary insurance policy on the case associated with the encounter.	Encounter
BilledTo	The party that was last billed for this charge.	Claim
Status	The status of this charge. (Completed, Pending, Ready, Error-Rejection, Error – Denial, Error – No Response, *** Undefined)	Claim
PracticeID	The unique identifier associated with the practice related to this charge.	Settings > Company > Find Practice
AppointmentID	The unique identifier associated with the appointment related to this charge.	Encounter
SchedulingProviderID	The unique identifier associated with the scheduling provider related to this charge.	Settings > Providers
RenderingProviderID	The unique identifier associated with the rendering provider related to this charge.	Settings > Providers
SupervisingProviderID	The unique identifier associated with the supervising provider related to this charge.	Settings > Providers
ReferringProviderID	The unique identifier associated with the referring provider related to this charge.	Settings > Referring Physicians
CopayAmount	The amount of the copay related to this charge.	Encounter
CopayMethod	The copay payment method related to this charge.	Encounter
CopayCategory	The copay payment category related to this charge.	Encounter
CopayReference	The copay reference number related to this charge.	Encounter
Minutes	The minutes related to this charge.	Encounter
LineNote	The line note related to this charge.	Encounter
RefCode	The reference code related to this charge.	Encounter
TypeOfService	The type of service insurance code related to this charge.	Encounter
HospitalizationStartDate	The hospitalization start date related to this charge.	Encounter
HospitalizationEndDate	The hospitalization end date related to this charge.	Encounter
LocalUseBox10d	The local use box 10d custom insurance field related to this charge.	Encounter
LocalUseBox19	The local use box 19 custom insurance field related to this charge.	Encounter
DoNotSendClaimElectronically	True if the claim should not be sent electronically. False otherwise.	Encounter
DoNotSendElectronicallyToSecondary	True if the claim should not be sent electronically to the secondary insurance. False otherwise.	Encounter
E-ClaimNoteType	The line note related to this charge.	Encounter
E-ClaimNote	The line note related to this charge.	Encounter
ServiceLocationID	The unique identifier of the service location related to this charge.	Settings > Service Locations
ServiceLocationBillingName	The billing name of the service location related to this charge.	Settings > Service Locations
ServiceLocationPlaceofServiceCode	The place of service insurance code related to this charge.	Settings > Service Locations
ServiceLocationPlaceOfServiceName	The name of the place of service insurance code related to this charge.	Settings > Service Locations
ServiceLocationAddressLine1	The first address line of the service location related to this charge.	Settings > Service Locations
ServiceLocationAddressLine2	The second address line of the service location related to this charge.	Settings > Service Locations
ServiceLocationCity	The city of the service location related to this charge.	Settings > Service Locations

ServiceLocationState	The state of the service location related to this charge.	Settings > Service Locations
ServiceLocationCountry	The country of the service location related to this charge.	Settings > Service Locations
ServiceLocationZipCode	The zip code of the service location related to this charge.	Settings > Service Locations
ServiceLocationPhone	The phone number of the service location related to this charge.	Settings > Service Locations
ServiceLocationPhoneExt	The phone number extension of the service location related to this charge.	Settings > Service Locations
ServiceLocationFax	The fax number of the service location related to this charge.	Settings > Service Locations
ServiceLocationFaxExt	The fax number extension of the service location related to this charge.	Settings > Service Locations
ServiceLocationNPI	The national provider identifier of the service location related to this charge.	Settings > Service Locations
ServiceLocationFacilityIDType	The facility ID type of the service location related to this charge.	Settings > Service Locations
ServiceLocationFacilityID	The facility ID of the service location related to this charge.	Settings > Service Locations
ServiceLocationCLIANumber	The CLIA number of the service location related to this charge.	Settings > Service Locations
AllowedAmount	The allowed amount expected for this charge, based upon the insurance contract settings.	Settings > Contracts
ExpectedAmount	The expected reimbursement amount expected for this charge, based upon the insurance contract settings.	Settings > Contracts
PrimaryInsuranceAddressLine1	The first address line of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
PrimaryInsuranceAddressLine2	The second address line of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
PrimaryInsuranceCity	The city of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
PrimaryInsuranceState	The state of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
PrimaryInsuranceCountry	The country of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
PrimaryInsuranceZipCode	The zip code of the insurance plan associated with the primary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
PrimaryInsuranceBatchID	The unique identifier of the billing batch associated with the primary insurance policy on the case related to this charge.	n/a
PrimaryInsuranceFirstBillDate	The date the charge was first billed to the primary insurance policy on the case related to this charge.	Case
PrimaryInsuranceLastBillDate	The date the charge was last billed to the primary insurance policy on the case related to this charge.	Case
PrimaryInsurancePaymentID	The unique identifier of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsurancePaymentPostingDate	The posting date of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsuranceAdjudicationDate	The adjudication date of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsurancePaymentRef	The reference number of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsurancePaymentMethodDesc	The payment method of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsurancePaymentCategoryDesc	The category of the payment posted from the primary insurance policy on the case related to this charge.	Payment

PrimaryInsuranceAllowed	The allowed amount of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsuranceContractAdjustment	The amount of the contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsuranceContractAdjustmentReason	The reason of the contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsuranceSecondaryAdjustment	The amount of the secondary contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsuranceSecondaryAdjustmentReason	The reason of the secondary contract adjustment of the payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsurancePayment	The payment posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsuranceDeductible	The deductible posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsuranceCoinsurance	The coinsurance posted from the primary insurance policy on the case related to this charge.	Payment
PrimaryInsuranceCopay	The copay posted from the primary insurance policy on the case related to this charge.	Payment
SecondaryInsuranceAddressLine1	The first address line of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
SecondaryInsuranceAddressLine2	The second address line of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
SecondaryInsuranceCity	The city of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
SecondaryInsuranceState	The state of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
SecondaryInsuranceCountry	The country of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
SecondaryInsuranceZipCode	The zip code of the insurance plan associated with the secondary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
SecondaryInsuranceBatchID	The unique identifier of the billing batch associated with the secondary insurance policy on the case related to this charge.	n/a
SecondaryInsuranceFirstBillDate	The date the charge was first billed to the secondary insurance policy on the case related to this charge.	Case
SecondaryInsuranceLastBillDate	The date the charge was last billed to the secondary insurance policy on the case related to this charge.	Case
SecondaryInsurancePaymentID	The unique identifier of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsurancePaymentPostingDate	The posting date of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsuranceAdjudicationDate	The adjudication date of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsurancePaymentRef	The reference number of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsurancePaymentMethodDesc	The payment method of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsurancePaymentCategoryDesc	The category of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsuranceAllowed	The allowed amount of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsuranceContractAdjustment	The amount of the contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsuranceContractAdjustmentReason	The reason of the contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsuranceSecondaryAdjustment	The amount of the secondary contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment

SecondaryInsuranceSecondaryAdjustmentReason	The reason of the secondary contract adjustment of the payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsurancePayment	The payment posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsuranceDeductible	The deductible posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsuranceCoinsurance	The coinsurance posted from the secondary insurance policy on the case related to this charge.	Payment
SecondaryInsuranceCopoly	The copay posted from the secondary insurance policy on the case related to this charge.	Payment
TertiaryInsuranceCompanyName	The first address line of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
TertiaryInsurancePlanName	The second address line of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
TertiaryInsuranceAddressLine1	The city of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
TertiaryInsuranceAddressLine2	The state of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
TertiaryInsuranceCity	The country of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
TertiaryInsuranceState	The zip code of the insurance plan associated with the tertiary insurance policy on the case related to this charge.	Patient > Case > Insurance Policy
TertiaryInsuranceCountry	The unique identifier of the billing batch associated with the tertiary insurance policy on the case related to this charge.	n/a
TertiaryInsuranceZipCode	The date the charge was first billed to the tertiary insurance policy on the case related to this charge.	Case
TertiaryInsuranceBatchID	The date the charge was last billed to the tertiary insurance policy on the case related to this charge.	Case
TertiaryInsurancePaymentID	The unique identifier of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsurancePaymentPostingDate	The posting date of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsuranceAdjudicationDate	The adjudication date of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsurancePaymentRef	The reference number of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsurancePaymentMethodDesc	The payment method of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsurancePaymentCategoryDesc	The category of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsuranceAllowed	The allowed amount of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsuranceContractAdjustment	The amount of the contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsuranceContractAdjustmentReason	The reason of the contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsuranceSecondaryAdjustment	The amount of the secondary contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsuranceSecondaryAdjustmentReason	The reason of the secondary contract adjustment of the payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsurancePayment	The payment posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsuranceDeductible	The deductible posted from the tertiary insurance policy on the case related to this charge.	Payment
TertiaryInsuranceCoinsurance	The coinsurance posted from the tertiary insurance policy on the case related to this charge.	Payment

TertiaryInsuranceCopay	The copay posted from the tertiary insurance policy on the case related to this charge.	Payment
PatientBatchID	The batch number associated with the patient payment related to this charge.	Payment
PatientFirstBillDate	The date the patient was first billed for this charge.	Claim
PatientLastBillDate	The date the patient was last billed for this charge.	Claim
PatientPaymentRef	The reference code related to the patient payment posted for this charge.	Payment
PatientPaymentID	The unique identifier of the patient payment posted for this charge.	Payment
PatientPaymentPostingDate	The posting date of the patient payment posted for this charge.	Payment
PatientPaymentMethodDesc	The payment method of the patient payment posted for this charge.	Payment
PatientPaymentCategoryDesc	The category of the patient payment posted for this charge.	Payment
PatientPaymentAmount	The amount of the patient payment posted for this charge.	Payment
OtherAdjustment	The type of other adjustment associated with the patient payment posted for this charge.	Payment

5.3 Get Patient

This operation returns a specific patient that matches the criteria included within the request. This will return all patient cases, insurance policies, and authorizations for the patient. Note this is only available with the 2.0 interface and above.

5.3.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Required
CustomerKey	The customer key associated with your customer account.	Yes
User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
PatientID	The unique ID of the patient.	Yes
PatientExternalID	The unique identifier of the patient in a third-party software system (used for integration purposes).	No

5.3.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
ID	The unique identifier of the patient.	Patient details
CreatedDate	The date the patient was created.	n/a
LastModifiedDate	The date the patient was last modified.	n/a
PracticeName	The name of the practice related to this patient.	Patient
FullName	The full name of the patient.	Patient
Prefix	The prefix of the patient.	Patient
FirstName	The first name of the patient.	Patient
MiddleName	The middle name of the patient.	Patient
LastName	The last name of the patient.	Patient
Suffix	The suffix of the patient.	Patient
SocialSecurityNumber	The social security number of the patient.	Patient
DateOfBirth	The date of birth of the patient.	Patient
Age	The age of the patient.	Patient

Gender	The gender of the patient.	Patient
MedicalRecordNumber	The medical record number for the patient.	Patient
MaritalStatus	The marital status of the patient. A = Annulled D = Divorced I = Interlocutory L = Legally Separated M = Married P = Polygamous S = Single/Never Married T = Domestic Partner W = Widowed	Patient
EmploymentStatus	The employment status of the patient.	Patient
EmployerName	The name of the employer related to this patient.	Patient
ReferralSource	The referral source of the patient.	Patient
AddressLine1	The first address line of the patient.	Patient
AddressLine2	The second address line of the patient.	Patient
City	The city of the patient.	Patient
State	The state of the patient.	Patient
Country	The country of the patient (if different than the U.S.).	Patient
ZipCode	The zip code of the patient.	Patient
HomePhone	The home phone number of the patient.	Patient
HomePhoneExt	The home phone number extension of the patient.	Patient
WorkPhone	The work phone number of the patient.	Patient
WorkPhoneExt	The work phone number extension of the patient.	Patient
MobilePhone	The mobile phone number of the patient.	Patient
MobilePhoneExt	The mobile phone number extension of the patient.	Patient
EmailAddress	The email address of the patient.	Patient
PracticeID	The unique identifier for the practice related to this patient.	Patient
DefaultRenderingProviderFullName	The name of the default rendering provider related to this patient.	Patient
DefaultRenderingProviderID	The unique identifier of the default rendering provider related to this patient.	Settings > Providers
PrimaryCarePhysicianFullName	The name of the primary care physician related to this patient.	Patient
PrimaryCarePhysicianID	The unique identifier of the primary care physician related to this patient.	Settings > Referring Physicians
ReferringProviderFullName	The name of the referring provider related to this patient.	Patient
ReferringProviderID	The unique identifier of the referring provider related to this patient.	Settings > Referring Physicians
DefaultServiceLocationID	The unique identifier of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationName	The name of the default service location related to this patient.	Patient
DefaultServiceLocationNameAddressLine1	The first address line of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameAddressLine2	The second address line of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameCity	The city of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameState	The state of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameCountry	The country of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameZipCode	The zip code of the default service location related to this patient.	Settings > Service Locations

DefaultServiceLocationBillingName	The billing name of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationPhone	The phone number of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationPhoneExt	The phone number extension of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationFaxPhone	The fax number of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationFaxPhoneExt	The fax number extension of the default service location related to this patient.	Settings > Service Locations
GuarantorDifferentThanPatient	The type of guarantor if different than the patient.	Patient
GuarantorPrefix	The prefix of the guarantor if different than the patient.	Patient
GuarantorFirstName	The first name of the guarantor if different than the patient.	Patient
GuarantorMiddleName	The middle name of the guarantor if different than the patient.	Patient
GuarantorLastName	The last name of the guarantor if different than the patient.	Patient
GuarantorSuffix	The suffix of the guarantor if different than the patient.	Patient
MostRecentNote1User	The user associated with the first most recent note related to this patient.	Patient
MostRecentNote1Date	The date associated with the first most recent note related to this patient.	Patient
MostRecentNote1Message	The message associated with the first most recent note related to this patient.	Patient
MostRecentNote2User	The user associated with the second most recent note related to this patient.	Patient
MostRecentNote2Date	The date associated with the second most recent note related to this patient.	Patient
MostRecentNote2Message	The message associated with the second most recent note related to this patient.	Patient
MostRecentNote3User	The user associated with the third most recent note related to this patient.	Patient
MostRecentNote3Date	The date associated with the third most recent note related to this patient.	Patient
MostRecentNote3Message	The message associated with the third most recent note related to this patient.	Patient
MostRecentNote4User	The user associated with the fourth most recent note related to this patient.	Patient
MostRecentNote4Date	The date associated with the fourth most recent note related to this patient.	Patient
MostRecentNote4Message	The message associated with the fourth most recent note related to this patient.	Patient
Cases	Collection of patient cases for this patient	
PatientCaseID	The unique identifier of the default case related to this patient.	Patient > Case
Name	The name of the default case related to this patient.	Patient > Case
Description	The description of the default case related to this patient.	Patient > Case
ReferringProviderID	The unique identifier of the referring provider associated with the default case related to this patient.	Settings > Referring Physicians
ReferringProviderFullName	The name of the referring provider associated with the default case related to this patient.	Patient > Case
SendPatientStatements	If patient statements should be sent for charges under the default case related to this patient, then true. Otherwise, false.	Patient > Case
PayerScenario	The payer scenario of the default case related to this patient.	Patient > Case
ConditionRelatedToAutoAccident	If the default case for this patient is related to an auto-accident, then true. Otherwise, false.	Patient > Case

ConditionRelatedToAutoAccidentState	The state of the auto accident for the default case related to this patient.	Patient > Case
ConditionRelatedToEmployment	If the default case for this patient is related to employment, then true. Otherwise, false.	Patient > Case
ConditionRelatedToPregnancy	If the default case for this patient is related to pregnancy, then true. Otherwise, false.	Patient > Case
ConditionRelatedToAbuse	If the default case for this patient is related to abuse then true. Otherwise, false.	Patient > Case
ConditionRelatedToOther	If the default case for this patient is related to other, then true. Otherwise, false.	Patient > Case
ConditionRelatedToEPSDT	If the default case for this patient is related to EPSDT, then true. Otherwise, false.	Patient > Case
ConditionRelatedToFamilyPlanning	If the default case for this patient is related to family planning, then true. Otherwise, false.	Patient > Case
ConditionRelatedToEmergency	If the default case for this patient is related to an emergency, then true. Otherwise, false.	Patient > Case
DatesInjuryStartDate	The start date of the injury of the default case related to this patient.	Patient > Case
DatesInjuryEndDate	The end date of the injury of the default case related to this patient.	Patient > Case
DatesSameorSimilarIllnessStartDate	The start date of the same or similar illness of the default case related to this patient.	Patient > Case
DatesSameorSimilarIllnessEndDate	The end date of the same or similar illness of the default case related to this patient.	Patient > Case
DatesUnabletoWorkStartDate	The start date the patient was unable to work for the default case related to this patient.	Patient > Case
DatesUnabletoWorkEndDate	The end date the patient was unable to work for the default case related to this patient.	Patient > Case
DatesRelatedDisabilityStartDate	The start date of a disability for the default case related to this patient.	Patient > Case
DatesRelatedDisabilityEndDate	The end date of a disability for the default case related to this patient.	Patient > Case
DatesRelatedHospitalizationStartDate	The start date of a hospitalization for the default case related to this patient.	Patient > Case
DatesRelatedHospitalizationEndDate	The end date of a hospitalization for the default case related to this patient.	Patient > Case
DatesLastMenstrualPeriodDate	The last menstrual period of the default case related to this patient.	Patient > Case
DatesLastSeenDate	The date the patient was last seen for the default case related to this patient.	Patient > Case
DatesReferralDate	The referral date for the default case related to this patient.	Patient > Case
DatesAcuteManifestationDate	The acute manifestation date of the default case related to this patient.	Patient > Case
DatesLastX-RayDate	The last x-ray date of the default case related to this patient.	Patient > Case
DatesAccidentDate	The accident date of the default case related to this patient.	Patient > Case
InsurancePolicies	Collection of insurance policies for this patient case	Patient > Case > Insurance Policy
PatientCaseID	The unique identifier of the patient case associated with this insurance policy.	Patient > Case > Insurance Policy
InsurancePolicyID	The unique identifier of the insurance policy.	Patient > Case > Insurance Policy
CompanyID	The unique identifier of the insurance company associated with this insurance policy.	Patient > Case > Insurance Policy
CompanyName	The name of the insurance company associated with this insurance policy.	Patient > Case > Insurance Policy
PlanID	The unique identifier of the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy

PlanName	The name of the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
PlanAddressLine1	The first address line of the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
PlanAddressLine2	The second address line of the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
PlanCity	The city of the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
PlanState	The state of the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
PlanCountry	The country of the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
PlanZipCode	The zip code of the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
AdjusterFullName	The adjuster name with the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
AdjusterPhoneNumber	The adjuster phone number with the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
AdjusterPhoneNumberExt	The adjuster phone number extension with the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
AdjusterFaxNumber	The adjuster fax number with the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
AdjusterFaxNumberExt	The adjuster fax number extension with the insurance plan associated with this insurance policy.	Patient > Case > Insurance Policy
Number	The policy number associated with this insurance policy.	Patient > Case > Insurance Policy
GroupNumber	The group number associated with this insurance policy.	Patient > Case > Insurance Policy
Copay	The copay associated with this insurance policy.	Patient > Case > Insurance Policy
Deductible	The deductible associated with this insurance policy.	Patient > Case > Insurance Policy
EffectiveStartDate	The effective start date associated with this insurance policy.	Patient > Case > Insurance Policy
EffectiveEndDate	The effective end date associated with this insurance policy.	Patient > Case > Insurance Policy
PatientRelationshipToInsured	The patient relationship to the insured associated with this insurance policy. C = Child O = Other S = Self U = Spouse	Patient > Case > Insurance Policy
InsuredFullName	The full name of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
InsuredAddressLine1	The first address line of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
InsuredAddressLine2	The second address line of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
InsuredCity	The city of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
InsuredState	The state of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
InsuredCountry	The country of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
InsuredZipCode	The zip code of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
InsuredIDNumber	The ID number of the insured associated with this insurance policy.	Patient > Case > Insurance Policy

InsuredSocialSecurityNumber	The social security number of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
InsuredDateofBirth	The date of birth of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
InsuredGender	The gender of the insured associated with this insurance policy.	Patient > Case > Insurance Policy
Notes	The notes on the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
Authorizations	Collection of insurance policy authorizations associated with this insurance policy	Patient > Case > Authorizations
AuthorizationNumber	The authorization number associated with this policy.	Patient > Case > Authorizations
AuthorizedNumberOfVisits	The number of visits authorized with the first authorization entered for this patient.	Patient > Case > Authorizations
AuthorizedNumberOfVisitsUsed	The number of visits used for the first authorization entered for this patient.	Patient > Case > Authorizations
ContactFullName	The insurance contact name associated with this policy.	Patient > Case > Authorizations
ContactPhone	The insurance contact phone number associated with this policy.	Patient > Case > Authorizations
ContactPhoneExt	The insurance contact phone number extension associated with this policy.	Patient > Case > Authorizations
Notes	The authorization notes associated with this policy.	Patient > Case > Authorizations
StartDate	The start date associated with this policy.	Patient > Case > Authorizations
EndDate	The end date associated with this policy.	Patient > Case > Authorizations
AlertMessage	The alert message related to this patient.	Patient > Alerts
AlertShowWhenDisplayingPatientDetails	True if the alert message related to this patient should show when displaying patient details. False otherwise.	Patient > Alerts
AlertShowWhenSchedulingAppointments	True if the alert message related to this patient should show when scheduling appointments. False otherwise.	Patient > Alerts
AlertShowWhenEnteringEncounters	True if the alert message related to this patient should show when entering encounters. False otherwise.	Patient > Alerts
AlertShowWhenViewingClaimDetails	True if the alert message related to this patient should show when viewing claim details. False otherwise.	Patient > Alerts
AlertShowWhenPostingPayments	True if the alert message related to this patient should show when posting payments. False otherwise.	Patient > Alerts
AlertShowWhenPreparingPatientStatements	True if the alert message related to this patient should show when preparing patient statements. False otherwise.	Patient > Alerts
CollectionCategoryName	The name of the collection category related to this patient.	Patient > Account
StatementNote	The last statement note posted to this patient's account.	Patient > Account
LastDiagnosis	The last diagnosis entered for this patient.	Patient > Account
LastAppointmentDate	The last appointment scheduled for this patient.	Patient > Account
LastEncounterDate	The service date of the last encounter entered for this patient.	Patient > Account
LastStatementDate	The date of the last patient statement sent to this patient.	Patient > Account
LastPaymentDate	The posting date of the last payment received from this patient.	Patient > Account
Charges	The total charges entered for this patient.	Patient > Account
Adjustments	The total adjustments entered for this patient.	Patient > Account
InsurancePayments	The total insurance payments posted for this patient.	Patient > Account
PatientPayments	The total patient payments posted for this patient.	Patient > Account
InsuranceBalance	The insurance balance pending on charges associated with this patient.	Patient > Account

PatientBalance	The patient balance on charges assigned to this patient.	Patient > Account
TotalBalance	The total balance related to this patient.	Patient > Account

5.4 Get Patients

This operation returns a list of patients that match the criteria included within the request.

5.4.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Required
CustomerKey	The customer key associated with your customer account.	Yes
User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
FieldsToReturn	The list of fields to return for each appointment record.	No
PracticeName	The name of the practice related to this patient.	Yes
FromCreatedDate	The starting date the patient record was created.	No
ToCreatedDate	The ending date the patient record was created.	No
FromLastModifiedDate	The starting date the patient was last modified.	No
ToLastModifiedDate	The ending date the patient was last modified.	No
FirstName	The first name of the patient to search for.	No
MiddleName	The middle name of the patient to search for.	No
LastName	The last name of the patient to search for.	No
SSN	The SSN of the patient to search for.	
FullName	The full name of the patient to search for (usually when not using FirstName, MiddleName, LastName).	No
FromDateOfBirth	The starting date for date of birth of the patient.	No
ToDateOfBirth	The ending date for date of birth of the patient.	No
ReferralSource	The referral source of the patient.	No
DefaultRenderingProviderFullName	The name of the default rendering provider related to this patient.	No
PrimaryCarePhysicianFullName	The name of the primary care physician related to this patient.	No
ReferringProviderFullName	The name of the referring provider related to this patient.	No
DefaultServiceLocationName	The name of the default service location related to this patient.	No
DefaultCasePayerScenario	The payer scenario of the default case related to this patient.	No
DefaultCaseDatesAccidentDate	The accident date of the default case related to this patient.	No
PrimaryInsurancePolicyCompanyName	The name of the insurance company associated with the primary insurance policy on the default case for this patient.	No
PrimaryInsurancePolicyPlanName	The name of the insurance plan associated with the primary insurance policy on the default case for this patient.	No
SecondaryInsurancePolicyCompanyName	The name of the insurance company associated with the secondary insurance policy on the default case for this patient.	No
SecondaryInsurancePolicyPlanName	The name of the insurance plan associated with the secondary insurance policy on the default case for this patient.	No
CollectionCategoryName	The name of the collection category related to this patient.	No
FromLastEncounterDate	The starting service date of the last encounter for the patient.	No
ToLastEncounterDate	The ending service date of the last encounter for the patient.	No

5.4.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
ID	The unique identifier of the patient.	Patient details
CreatedDate	The date the patient was created.	n/a
LastModifiedDate	The date the patient was last modified.	n/a
PracticeName	The name of the practice related to this patient.	Patient
FullName	The full name of the patient.	Patient
Prefix	The prefix of the patient.	Patient
FirstName	The first name of the patient.	Patient
MiddleName	The middle name of the patient.	Patient
LastName	The last name of the patient.	Patient
Suffix	The suffix of the patient.	Patient
SocialSecurityNumber	The social security number of the patient.	Patient
DateOfBirth	The date of birth of the patient.	Patient
Age	The age of the patient.	Patient
Gender	The gender of the patient.	Patient
MedicalRecordNumber	The medical record number for the patient.	Patient
MaritalStatus	The marital status of the patient. A = Annulled D = Divorced I = Interlocutory L = Legally Separated M = Married P = Polygamous S = Single/Never Married T = Domestic Partner W = Widowed	Patient
EmploymentStatus	The employment status of the patient.	Patient
EmployerName	The name of the employer related to this patient.	Patient
ReferralSource	The referral source of the patient.	Patient
AddressLine1	The first address line of the patient.	Patient
AddressLine2	The second address line of the patient.	Patient
City	The city of the patient.	Patient
State	The state of the patient.	Patient
Country	The country of the patient (if different than the U.S.).	Patient
ZipCode	The zip code of the patient.	Patient
HomePhone	The home phone number of the patient.	Patient
HomePhoneExt	The home phone number extension of the patient.	Patient
WorkPhone	The work phone number of the patient.	Patient
WorkPhoneExt	The work phone number extension of the patient.	Patient
MobilePhone	The mobile phone number of the patient.	Patient
MobilePhoneExt	The mobile phone number extension of the patient.	Patient
EmailAddress	The email address of the patient.	Patient
PracticeID	The unique identifier for the practice related to this patient.	Patient
DefaultRenderingProviderFullName	The name of the default rendering provider related to this patient.	Patient
DefaultRenderingProviderID	The unique identifier of the default rendering provider related to this patient.	Settings > Providers
PrimaryCarePhysicianFullName	The name of the primary care physician related to this patient.	Patient

PrimaryCarePhysicianID	The unique identifier of the primary care physician related to this patient.	Settings > Referring Physicians
ReferringProviderFullName	The name of the referring provider related to this patient.	Patient
ReferringProviderID	The unique identifier of the referring provider related to this patient.	Settings > Referring Physicians
DefaultServiceLocationID	The unique identifier of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationName	The name of the default service location related to this patient.	Patient
DefaultServiceLocationNameAddressLine1	The first address line of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameAddressLine2	The second address line of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameCity	The city of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameState	The state of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameCountry	The country of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationNameZipCode	The zip code of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationBillingName	The billing name of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationPhone	The phone number of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationPhoneExt	The phone number extension of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationFaxPhone	The fax number of the default service location related to this patient.	Settings > Service Locations
DefaultServiceLocationFaxPhoneExt	The fax number extension of the default service location related to this patient.	Settings > Service Locations
GuarantorDifferentThanPatient	The type of guarantor if different than the patient.	Patient
GuarantorPrefix	The prefix of the guarantor if different than the patient.	Patient
GuarantorFirstName	The first name of the guarantor if different than the patient.	Patient
GuarantorMiddleName	The middle name of the guarantor if different than the patient.	Patient
GuarantorLastName	The last name of the guarantor if different than the patient.	Patient
GuarantorSuffix	The suffix of the guarantor if different than the patient.	Patient
MostRecentNote1User	The user associated with the first most recent note related to this patient.	Patient
MostRecentNote1Date	The date associated with the first most recent note related to this patient.	Patient
MostRecentNote1Message	The message associated with the first most recent note related to this patient.	Patient
MostRecentNote2User	The user associated with the second most recent note related to this patient.	Patient
MostRecentNote2Date	The date associated with the second most recent note related to this patient.	Patient
MostRecentNote2Message	The message associated with the second most recent note related to this patient.	Patient
MostRecentNote3User	The user associated with the third most recent note related to this patient.	Patient
MostRecentNote3Date	The date associated with the third most recent note related to this patient.	Patient
MostRecentNote3Message	The message associated with the third most recent note related to this patient.	Patient

MostRecentNote4User	The user associated with the fourth most recent note related to this patient.	Patient
MostRecentNote4Date	The date associated with the fourth most recent note related to this patient.	Patient
MostRecentNote4Message	The message associated with the fourth most recent note related to this patient.	Patient
DefaultCaseID	The unique identifier of the default case related to this patient.	n/a
DefaultCaseName	The name of the default case related to this patient.	Patient
DefaultCaseDescription	The description of the default case related to this patient.	Patient > Case
DefaultCaseReferringProviderID	The unique identifier of the referring provider associated with the default case related to this patient.	Settings > Referring Physicians
DefaultCaseReferringProviderFullName	The name of the referring provider associated with the default case related to this patient.	Patient > Case
DefaultCaseSendPatientStatements	If patient statements should be sent for charges under the default case related to this patient, then true. Otherwise, false.	Patient > Case
DefaultCasePayerScenario	The payer scenario of the default case related to this patient.	Patient > Case
DefaultCaseConditionRelatedToAutoAccident	If the default case for this patient is related to an auto-accident, then true. Otherwise, false.	Patient > Case
DefaultCaseConditionRelatedToAutoAccidentState	The state of the auto accident for the default case related to this patient.	Patient > Case
DefaultCaseConditionRelatedToEmployment	If the default case for this patient is related to employment, then true. Otherwise, false.	Patient > Case
DefaultCaseConditionRelatedToPregnancy	If the default case for this patient is related to pregnancy, then true. Otherwise, false.	Patient > Case
DefaultCaseConditionRelatedToAbuse	If the default case for this patient is related to abuse then true. Otherwise, false.	Patient > Case
DefaultCaseConditionRelatedToOther	If the default case for this patient is related to other, then true. Otherwise, false.	Patient > Case
DefaultCaseConditionRelatedToEPSDT	If the default case for this patient is related to EPSDT, then true. Otherwise, false.	Patient > Case
DefaultCaseConditionRelatedToFamilyPlanning	If the default case for this patient is related to family planning, then true. Otherwise, false.	Patient > Case
DefaultCaseConditionRelatedToEmergency	If the default case for this patient is related to an emergency, then true. Otherwise, false.	Patient > Case
DefaultCaseDatesInjuryStartDate	The start date of the injury of the default case related to this patient.	Patient > Case
DefaultCaseDatesInjuryEndDate	The end date of the injury of the default case related to this patient.	Patient > Case
DefaultCaseDatesSameorSimilarIllnessStartDate	The start date of the same or similar illness of the default case related to this patient.	Patient > Case
DefaultCaseDatesSameorSimilarIllnessEndDate	The end date of the same or similar illness of the default case related to this patient.	Patient > Case
DefaultCaseDatesUnabletoWorkStartDate	The start date the patient was unable to work for the default case related to this patient.	Patient > Case
DefaultCaseDatesUnabletoWorkEndDate	The end date the patient was unable to work for the default case related to this patient.	Patient > Case
DefaultCaseDatesRelatedDisabilityStartDate	The start date of a disability for the default case related to this patient.	Patient > Case
DefaultCaseDatesRelatedDisabilityEndDate	The end date of a disability for the default case related to this patient.	Patient > Case
DefaultCaseDatesRelatedHospitalizationStartDate	The start date of a hospitalization for the default case related to this patient.	Patient > Case
DefaultCaseDatesRelatedHospitalizationEndDate	The end date of a hospitalization for the default case related to this patient.	Patient > Case
DefaultCaseDatesLastMenstrualPeriodDate	The last menstrual period of the default case related to this patient.	Patient > Case
DefaultCaseDatesLastSeenDate	The date the patient was last seen for the default case related to this patient.	Patient > Case

DefaultCaseDatesReferralDate	The referral date for the default case related to this patient.	Patient > Case
DefaultCaseDatesAcuteManifestationDate	The acute manifestation date of the default case related to this patient.	Patient > Case
DefaultCaseDatesLastX-RayDate	The last x-ray date of the default case related to this patient.	Patient > Case
DefaultCaseDatesAccidentDate	The accident date of the default case related to this patient.	Patient > Case
PrimaryInsurancePolicyCompanyID	The unique identifier of the insurance company associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyCompanyName	The name of the insurance company associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyPlanID	The unique identifier of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyPlanName	The name of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyPlanAddressLine1	The first address line of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyPlanAddressLine2	The second address line of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyPlanCity	The city of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyPlanState	The state of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyPlanCountry	The country of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyPlanZipCode	The zip code of the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyAdjusterFullName	The adjuster name with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyAdjusterPhoneNumber	The adjuster phone number with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyAdjusterPhoneNumberExt	The adjuster phone number extension with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyAdjusterFaxNumber	The adjuster fax number with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyAdjusterFaxNumberExt	The adjuster fax number extension with the insurance plan associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyNumber	The policy number associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyGroupNumber	The group number associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyCopay	The copay associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyDeductible	The deductible associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyEffectiveStartDate	The effective start date associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyEffectiveEndDate	The effective end date associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyPatientRelationshipToInsured	The patient relationship to the insured associated with the primary insurance policy on the default case for this patient. C = Child O = Other S = Self U = Spouse	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredFullName	The full name of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy

PrimaryInsurancePolicyInsuredAddressLine1	The first address line of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredAddressLine2	The second address line of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredCity	The city of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredState	The state of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredCountry	The country of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredZipCode	The zip code of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredIDNumber	The ID number of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredSocialSecurityNumber	The social security number of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredDateOfBirth	The date of birth of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyInsuredGender	The gender of the insured associated with the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
PrimaryInsurancePolicyNotes	The notes on the primary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyCompanyID	The unique identifier of the insurance company associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyCompanyName	The name of the insurance company associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyPlanID	The unique identifier of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyPlanName	The name of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyPlanAddressLine1	The first address line of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyPlanAddressLine2	The second address line of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyPlanCity	The city of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyPlanState	The state of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyPlanCountry	The country of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyPlanZipCode	The zip code of the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyAdjusterFullName	The adjuster name with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyAdjusterPhoneNumber	The adjuster phone number with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyAdjusterPhoneNumberExt	The adjuster phone number extension with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyAdjusterFaxNumber	The adjuster fax number with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyAdjusterFaxNumberExt	The adjuster fax number extension with the insurance plan associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyNumber	The policy number associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyGroupNumber	The group number associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy

SecondaryInsurancePolicyCopay	The copay associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyDeductible	The deductible associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyEffectiveStartDate	The effective start date associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyEffectiveEndDate	The effective end date associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyPatientRelationshipToInsured	The patient relationship to the insured associated with the secondary insurance policy on the default case for this patient. C = Child O = Other S = Self U = Spouse	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredFullName	The full name of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredAddressLine1	The first address line of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredAddressLine2	The second address line of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredCity	The city of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredState	The state of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredCountry	The country of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredZipCode	The zip code of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredIDNumber	The ID number of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredSocialSecurityNumber	The social security number of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredDateOfBirth	The date of birth of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyInsuredGender	The gender of the insured associated with the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
SecondaryInsurancePolicyNotes	The notes on the secondary insurance policy on the default case for this patient.	Patient > Case > Insurance Policy
Authorization1Number	The authorization number associated with the first authorization entered for this patient.	Patient > Case > Authorizations
Authorization1InsurancePlanName	The insurance plan name associated with the first authorization entered for this patient.	Patient > Case > Authorizations
Authorization1NumberOfVisits	The number of visits authorized with the first authorization entered for this patient.	Patient > Case > Authorizations
Authorization1NumberOfVisitsUsed	The number of visits used for the first authorization entered for this patient.	Patient > Case > Authorizations
Authorization1ContactFullName	The insurance contact name associated with the first authorization entered for this patient.	Patient > Case > Authorizations
Authorization1ContactPhone	The insurance contact phone number associated with the first authorization entered for this patient.	Patient > Case > Authorizations
Authorization1ContactPhoneExt	The insurance contact phone number extension associated with the first authorization entered for this patient.	Patient > Case > Authorizations
Authorization1Notes	The authorization notes associated with the first authorization entered for this patient.	Patient > Case > Authorizations
Authorization1StartDate	The start date associated with the first authorization entered for this patient.	Patient > Case > Authorizations
Authorization1EndDate	The end date associated with the first authorization entered for this patient.	Patient > Case > Authorizations

Authorization2Number	The authorization number associated with the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization2InsPlanName	The insurance plan name associated with the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization2NumberOfVisits	The number of visits authorized with the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization2NumberOfVisitsUsed	The number of visits used for the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization2ContactFullName	The insurance contact name associated with the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization2ContactPhone	The insurance contact phone number associated with the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization2ContactPhoneExt	The insurance contact phone number extension associated with the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization2Notes	The authorization notes associated with the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization2StartDate	The start date associated with the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization2EndDate	The end date associated with the second authorization entered for this patient.	Patient > Case > Authorizations
Authorization3Number	The authorization number associated with the third authorization entered for this patient.	Patient > Case > Authorizations
Authorization3InsPlanName	The insurance plan name associated with the third authorization entered for this patient.	Patient > Case > Authorizations
Authorization3NumberOfVisits	The number of visits authorized with the third authorization entered for this patient.	Patient > Case > Authorizations
Authorization3NumberOfVisitsUsed	The number of visits used for the third authorization entered for this patient.	Patient > Case > Authorizations
Authorization3ContactFullName	The insurance contact name associated with the third authorization entered for this patient.	Patient > Case > Authorizations
Authorization3ContactPhone	The insurance contact phone number associated with the third authorization entered for this patient.	Patient > Case > Authorizations
Authorization3ContactPhoneExt	The insurance contact phone number extension associated with the third authorization entered for this patient.	Patient > Case > Authorizations
Authorization3Notes	The authorization notes associated with the third authorization entered for this patient.	Patient > Case > Authorizations
Authorization3StartDate	The start date associated with the third authorization entered for this patient.	Patient > Case > Authorizations
Authorization3EndDate	The end date associated with the third authorization entered for this patient.	Patient > Case > Authorizations
AlertMessage	The alert message related to this patient.	Patient > Alerts
AlertShowWhenDisplayingPatientDetails	True if the alert message related to this patient should show when displaying patient details. False otherwise.	Patient > Alerts
AlertShowWhenSchedulingAppointments	True if the alert message related to this patient should show when scheduling appointments. False otherwise.	Patient > Alerts
AlertShowWhenEnteringEncounters	True if the alert message related to this patient should show when entering encounters. False otherwise.	Patient > Alerts
AlertShowWhenViewingClaimDetails	True if the alert message related to this patient should show when viewing claim details. False otherwise.	Patient > Alerts
AlertShowWhenPostingPayments	True if the alert message related to this patient should show when posting payments. False otherwise.	Patient > Alerts
AlertShowWhenPreparingPatientStatements	True if the alert message related to this patient should show when preparing patient statements. False otherwise.	Patient > Alerts
CollectionCategoryName	The name of the collection category related to this patient.	Patient > Account
StatementNote	The last statement note posted to this patient's account.	Patient > Account
LastDiagnosis	The last diagnosis entered for this patient.	Patient > Account

LastAppointmentDate	The last appointment scheduled for this patient.	Patient > Account
LastEncounterDate	The service date of the last encounter entered for this patient.	Patient > Account
LastStatementDate	The date of the last patient statement sent to this patient.	Patient > Account
LastPaymentDate	The posting date of the last payment received from this patient.	Patient > Account
Charges	The total charges entered for this patient.	Patient > Account
Adjustments	The total adjustments entered for this patient.	Patient > Account
InsurancePayments	The total insurance payments posted for this patient.	Patient > Account
PatientPayments	The total patient payments posted for this patient.	Patient > Account
InsuranceBalance	The insurance balance pending on charges associated with this patient.	Patient > Account
PatientBalance	The patient balance on charges assigned to this patient.	Patient > Account
TotalBalance	The total balance related to this patient.	Patient > Account

5.5 Get Payments

This operation returns a list of payments that match the criteria included within the request.

5.5.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Required
CustomerKey	The customer key associated with your customer account.	Yes
User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
FieldsToReturn	The list of fields to return for each payment record.	No
ID	The ID of the payment to filter.	No
PracticeID	The ID of the practice related to the payment.	No
FromCreatedDate	The starting date the payment record was created.	No
ToCreatedDate	The ending date the payment record was created.	No
FromLastModifiedDate	The starting date the payment was last modified.	No
ToLastModifiedDate	The ending date the payment was last modified.	No
PracticeName	The name of the practice related to this payment.	No
BatchNumber	The batch number to filter.	No
FromPostDate	The starting date for the payment record's posting date.	No
ToPostDate	The ending date for the payment record's posting date.	No
PayerType	The payer type to filter (Insurance, Other, or Patient).	No
PayerName	The payer name to filter.	No
AppointmentID	The appointment ID to filter.	No
ReferenceNumber	The reference number to filter.	No
Amount	The payment amount to filter.	No

5.5.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
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PracticeId	The unique identifier associated with the practice related to this payment.	Settings > Company > Find Practice
ID	The unique identifier of the payment.	Payment
CreatedDate	The date the payment was created.	n/a
LastModifiedDate	The date the payment was last modified.	n/a
BatchNumber	The batch number for the payment.	Payment
PostDate	The post date for the payment.	Payment
AdjudicationDate	The adjudication date for the payment.	Payment
PayerType	The payer type for the payment.	Payment
PayerName	The payer name for the payment.	Payment
AppointmentID	The appointment id related to the payment.	Payment
ReferenceNumber	The reference number for the payment.	Payment
PaymentMethod	The payment method for the payment.	Payment
Category	The category for the payment.	Payment
Amount	The payment amount.	Payment
Applied	The payment applied amount.	Payment
Adjustments	The payment adjustments amount.	Payment
Refunds	The payment refunds amount.	Payment
Unapplied	The payment unapplied amount.	Payment

5.6 Get Practices

This operation returns a list of practices that match the criteria included within the request.

5.6.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Required
CustomerKey	The customer key associated with your customer account.	Yes
User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
FieldsToReturn	The list of fields to return for each practice record.	No
PracticeName	The name of the practice related to the provider.	Yes
FromCreatedDate	The starting date within which the practice was created.	No
ToCreatedDate	The ending date within which the practice was created.	No
FromLastModifiedDate	The starting date within which the practice was last modified.	No
ToLastModifiedDate	The ending date within which the practice was last modified.	No
TaxID	The tax ID of the practice.	No
NPI	The NPI of the practice.	No
Active	True if the practice is active, false otherwise.	No

5.6.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
ID	The unique identifier of the provider.	Provider details

CreatedDate	The date the provider was created.	n/a
LastModifiedDate	The date the provider was last modified.	n/a
PracticeName	The name of the practice related to this provider.	Settings > Providers or Referring Physicians
Type	Either "Normal Provider" or "Referring Provider".	Settings > Providers or Referring Physicians
FullName	The full name of the provider.	Settings > Providers or Referring Physicians
Prefix	The prefix of the provider.	Settings > Providers or Referring Physicians
FirstName	The first name of the provider.	Settings > Providers or Referring Physicians
MiddleName	The middle name of the provider.	Settings > Providers or Referring Physicians
LastName	The last name of the provider.	Settings > Providers or Referring Physicians
Suffix	The suffix of the provider.	Settings > Providers or Referring Physicians
Degree	The degree of the provider.	Settings > Providers or Referring Physicians
SocialSecurityNumber	The social security number of the provider.	Settings > Providers or Referring Physicians
NationalProviderIdentifier	The national provider identifier (NPI) of the provider.	Settings > Providers or Referring Physicians
SpecialtyName	The specialty name associated with the provider.	Settings > Providers or Referring Physicians
BillingType	The type of provider for Kareo billing purposes.	Settings > Providers or Referring Physicians
Active	True if the provider is active. False otherwise.	Settings > Providers or Referring Physicians
DepartmentName	The department name related to this provider.	Settings > Providers or Referring Physicians
EncounterFormName	The name of the encounter form related to this provider.	Settings > Providers or Referring Physicians
AddressLine1	The first address line of the provider.	Settings > Providers or Referring Physicians
AddressLine2	The second address line of the provider.	Settings > Providers or Referring Physicians
City	The city of the provider.	Settings > Providers or Referring Physicians
State	The state of the provider.	Settings > Providers or Referring Physicians
Country	The country of the provider (if different than the U.S.).	Settings > Providers or Referring Physicians
ZipCode	The zip code of the provider.	Settings > Providers or Referring Physicians

5.7 Get Procedure Codes

This operation returns a list of procedure codes that match the criteria included within the request.

5.7.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Required
CustomerKey	The customer key associated with your customer account.	Yes

User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
FieldsToReturn	The list of fields to return for each procedure code record.	No
ID	The ID of the procedure code to look up.	No
ProcedureCode	The procedure code to look up.	No
Active	Used to filter out only active procedure codes.	No
CustomerSpecific	Used to filter out only customer created procedure codes.	No
FromCreatedDate	The starting date the procedure code was created.	No
ToCreatedDate	The starting date the procedure code was created.	No
FromLastModifiedDate	The starting date the procedure code was last modified.	No
ToLastModifiedDate	The ending date the procedure code was last modified.	No

5.7.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
ID	The unique identifier of the procedure code.	n/a
CustomerSpecific	True if the code was created by the customer. Otherwise, false.	Procedure Code details
ProcedureCode	Procedure or speed code.	Procedure Code details
TypeOfServiceCode	The type of service of the procedure code.	Procedure Code details
Active	True if the procedure code is active. Otherwise, false.	Procedure Code details
OfficialName	The official name of the procedure code.	Procedure Code details
LocalName	The local name of the procedure code.	Procedure Code details
OfficialDescription	The official description code of the procedure code.	Procedure Code details
BillableCode	The billable procedure code of the procedure code.	Procedure Code details
DefaultUnits	The default units of the procedure code.	Procedure Code details
NDC	The NDC number of the procedure code	Procedure Code details
DrugName	The drug name of the procedure code	Procedure Code details
ProcedureCodeCategoryID	The procedure code category of the procedure code	Procedure Code details
CreatedDate	The date the provider was created.	n/a
ModifiedDate	The date the provider was last modified.	n/a

5.8 Get Providers

This operation returns a list of providers that match the criteria included within the request.

5.8.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Required
CustomerKey	The customer key associated with your customer account.	Yes
User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
FieldsToReturn	The list of fields to return for each appointment record.	No

PracticeName	The name of the practice related to the provider.	Yes
FromCreatedDate	The starting date the provider record was created.	No
ToCreatedDate	The starting date the provider record was created.	No
FromLastModifiedDate	The starting date the provider was last modified.	No
ToLastModifiedDate	The ending date the provider was last modified.	No
Type	Either "Normal Provider" or "Referring Provider".	No
FullName	The full name of the provider.	No
DepartmentName	The department name related to this provider.	No

5.8.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
ID	The unique identifier of the practice.	Practice details
PracticeName	The name of the practice.	Practice details
CreatedDate	The date the practice was created.	n/a
LastModifiedDate	The date the practice was last modified.	n/a
TaxID	The tax if the practice.	Practice details
NPI	The NPI of the practice.	Practice details
Active	True if the practice is active. Otherwise, false.	Practice details
SubscriptionEdition	The subscription edition of the practice.	Practice details
PracticeAddressLine1	The first address line of the practice.	Practice details
PracticeAddressLine2	The second address line of the practice.	Practice details
PracticeCity	The city of the practice.	Practice details
PracticeState	The state of the practice.	Practice details
PracticeCountry	The country of the practice (if different than the U.S.).	Practice details
PracticeZipCode	The zip code of the practice.	Practice details
WebSite	The web site of the practice.	Practice details
Phone	The phone number of the practice.	Practice details
PhoneExt	The phone number extension of the practice.	Practice details
Fax	The fax number of the provider.	Practice details
FaxExt	The fax number extension of the provider.	Practice details
kFaxNumber	The Kareo assigned fax number of the practice.	Practice details
Email	The email address of the practice.	Practice Details
AdministratorAddressLine1	The first address line of the practice administrator.	Practice details
AdministratorAddressLine2	The second address line of the practice administrator.	Practice details
AdministratorCity	The city of the practice administrator.	Practice details
AdministratorState	The state of the practice administrator.	Practice details
AdministratorCountry	The country of the practice administrator (if different than the U.S.).	Practice details
AdministratorZipCode	The zip code of the practice administrator.	Practice details
AdministratorPhone	The phone number of the practice administrator.	Practice details
AdministratorPhoneExt	The phone number extension of the practice administrator.	Practice details
AdministratorFax	The fax number of the practice administrator.	Practice details
AdministratorFaxExt	The fax number extension of the practice administrator.	Practice details
AdministratorEmail	The email address of the practice administrator.	Practice Details

BillingContactAddressLine1	The first address line of the billing contact.	Practice details
BillingContactAddressLine2	The second address line of the billing contact.	Practice details
BillingContactCity	The city of the billing contact.	Practice details
BillingContactState	The state of the billing contact.	Practice details
BillingContactCountry	The country of the billing contact (if different than the U.S.).	Practice details
BillingContactZipCode	The zip code of the billing contact.	Practice details
BillingContactPhone	The phone number of the billing contact.	Practice details
BillingContactPhoneExt	The phone number extension of the billing contact.	Practice details
BillingContactFax	The fax number of the billing contact.	Practice details
BillingContactFaxExt	The fax number extension of the billing contact.	Practice details
BillingContactEmail	The email address of the billing contact.	Practice Details
Notes	The notes related to this provider.	Practice details

5.9 Get Service Locations

This operation returns a list of providers that match the criteria included within the request.

5.9.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Required
CustomerKey	The customer key associated with your customer account.	Yes
User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
FieldsToReturn	The list of fields to return for each service location record.	No
ID	The ID of the service location to look up.	No
PracticeName	The name of the practice related to the service location.	Yes (or PracticeID)
PracticeID	The ID of the practice related to the service location.	Yes (or PracticeName)
FromCreatedDate	The starting date the service location was created.	No
ToCreatedDate	The starting date the service location was created.	No
FromLastModifiedDate	The starting date the service location was last modified.	No
ToLastModifiedDate	The ending date the service location was last modified.	No

5.9.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
ID	The unique identifier of the service location.	n/a
PracticeID	The ID of the practice	Practice details
PracticeName	The name of the practice.	Practice details
Name	The name of the service location.	Service Location details
AddressLine1	The first address line of the service location.	Service Location details
AddressLine2	The second address line of the service location.	Service Location details
City	The city of the service location.	Service Location details
State	The state of the service location.	Service Location details
Country	The country of the service location (if different than the U.S.).	Service Location details

ZipCode	The zip code of the service location.	Service Location details
CreatedDate	The date the provider was created.	n/a
ModifiedDate	The date the provider was last modified.	n/a
PlaceOfService	The place of service type id for the service location.	Service Location details
BillingName	The billing name for the service location.	Service Location details
Phone	The phone number for the service location.	Service Location details
PhoneExt	The phone extension for the service location.	Service Location details
FaxPhone	The fax number for the service location.	Service Location details
FaxPhoneExt	The fax number extension for the service location.	Service Location details
HCFABox32FacilityID	The facility ID for the service location.	Service Location details
CLIANumber	The CLIA number for the service location.	Service Location details
NPI	The NPI for the service location.	Service Location details
FacilityIDType	The Facility ID Type for the service location.	Service Location details

5.10 Get Transactions

This operation returns a list of transactions that match the criteria included within the request.

5.10.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Required
CustomerKey	The customer key associated with your customer account.	Yes
User	The username associated with the user account with authorized security permissions to the API.	Yes
Password	The password associated with the user account with authorized security permissions to the API.	Yes
FieldsToReturn	The list of fields to return for each appointment record.	No
PracticeName	The name of the practice related to the provider.	Yes
FromLastModifiedDate	The starting date the transaction was last modified.	No
LastModifiedDate	The ending date the transaction was last modified.	No
FromTransactionDate	The starting date the transaction was entered by the user.	No
ToTransactionDate	The ending date the transaction was entered by the user.	No
FromPostingDate	The starting posting date of the transaction as specified by the user.	No
ToPostingDate	The ending posting date of the transaction as specified by the user.	No
FromServiceDate	The starting service date of the transaction, if applicable.	No
ToServiceDate	The ending service date of the transaction, if applicable.	No
Type	The type of transaction.	No
PayerType	The payer type related to this transaction, if applicable.	No
InsuranceOrder	The order of the insurance related to this transaction, if applicable.	No
ProcedureCode	The procedure code related to this transaction, if applicable.	No

5.10.2 The Response

The following information will returned with the response for this operation.

Field Name	Description	Where to Find in Kareo
ID	The unique identifier of the transaction.	n/a
Last Modified Date	The date the transaction was last modified.	Varies by transaction
Practice Name	The name of the practice related to this transaction.	Varies by transaction

Transaction Date	The date the transaction was entered by the user.	Varies by transaction
Posting Date	The posting date of the transaction as specified by the user.	Varies by transaction
Service Date	The service date of the transaction, if applicable.	Varies by transaction
Type	The type of transaction.	Varies by transaction
Patient ID	The unique identifier of the patient related to this transaction, if applicable.	Varies by transaction
Patient Full Name	The full name of the patient related to this transaction, if applicable.	Varies by transaction
Payer Type	The payer type related to this transaction, if applicable.	Varies by transaction
Insurance Order	The order of the insurance related to this transaction, if applicable.	Varies by transaction
Insurance ID	The unique identifier of the insurance related to this transaction, if applicable.	Varies by transaction
Insurance Company Name	The name of the insurance company related to this transaction, if applicable.	Varies by transaction
Insurance Plan Name	The name of the insurance plan related to this transaction, if applicable.	Varies by transaction
Procedure Code	The procedure code related to this transaction, if applicable.	Varies by transaction
Description	The description of this transaction.	Varies by transaction
Amount	The amount of this transaction, if applicable.	Varies by transaction
Practice ID	The unique identifier of the practice related to this transaction.	Varies by transaction

5.11 Create Patient

This operation creates a new patient with the information included within the request.

5.11.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Strongly-Typed Object	Required
CustomerKey	The customer key associated with your customer account.	RequestHeader	Yes
User	The username associated with the user account with authorized security permissions to the API.	RequestHeader	Yes
Password	The password associated with the user account with authorized security permissions to the API.	RequestHeader	Yes
Practice	To select a specific practice, caller would provide one of the sub-fields below.	PracticeIdentifierReq	Yes, if more than one practice
PracticeID	The unique identifier associated with the practice related to this patient.	PracticeIdentifierReq	
PracticeName	The name of the practice related to this patient.	PracticeIdentifierReq	
PracticeExternalID	The unique identifier of the practice in a third-party software system (used for integration purposes).	PracticeIdentifierReq	No
PatientExternalID	The unique identifier of the patient in a third-party software system (used for integration purposes).	PatientCreate	No
Prefix	The prefix of the patient.	PatientCreate	No
FirstName	The first name of the patient.	PatientCreate	Yes
MiddleName	The middle name of the patient.	PatientCreate	No
LastName	The last name of the patient.	PatientCreate	Yes
Suffix	The suffix of the patient.	PatientCreate	No
SocialSecurityNumber	The social security number of the patient.	PatientCreate	No
DateOfBirth	The date of birth of the patient.	PatientCreate	No

Gender	The gender of the patient.	PatientCreate	No
MedicalRecordNumber	The medical record number for the patient.	PatientCreate	No
MaritalStatus	The marital status of the patient. A = Annulled D = Divorced I = Interlocutory L = Legally Separated M = Married P = Polygamous S = Single/Never Married T = Domestic Partner W = Widowed	PatientCreate	No
ReferralSource	The referral source of the patient.	PatientCreate	No
AddressLine1	The first address line of the patient.	PatientCreate	No
AddressLine2	The second address line of the patient.	PatientCreate	No
City	The city of the patient.	PatientCreate	No
State	The state of the patient.	PatientCreate	No
Country	The country of the patient (if different than the U.S.).	PatientCreate	No
ZipCode	The zip code of the patient.	PatientCreate	No
HomePhone	The home phone number of the patient.	PatientCreate	No
HomePhoneExt	The home phone number extension of the patient.	PatientCreate	No
WorkPhone	The work phone number of the patient.	PatientCreate	No
WorkPhoneExt	The work phone number extension of the patient.	PatientCreate	No
MobilePhone	The mobile phone number of the patient.	PatientCreate	No
MobilePhoneExt	The mobile phone number extension of the patient.	PatientCreate	No
EmailAddress	The email address of the patient.	PatientCreate	No
Note	An initial note on the patient record in the notes area.	PatientCreate	No
CollectionCategoryName	The name of the collection category related to this patient.	PatientCreate	No
Guarantor		PatientGuarantorReq	
DifferentThanPatient	True if guarantor is different than the patient.	PatientGuarantorReq	No
RelationshipToGuarantor	The patient relationship to the guarantor.	PatientGuarantorReq	No
GuarantorPrefix	The prefix of the guarantor if different than the patient.	PatientGuarantorReq	No
GuarantorFirstName	The first name of the guarantor if different than the patient.	PatientGuarantorReq	No
GuarantorMiddleName	The middle name of the guarantor if different than the patient.	PatientGuarantorReq	No
GuarantorLastName	The last name of the guarantor if different than the patient.	PatientGuarantorReq	No
GuarantorSuffix	The suffix of the guarantor if different than the patient.	PatientGuarantorReq	No
AddressLine1	The first address line of the guarantor.	PatientGuarantorReq	No
AddressLine2	The second address line of the guarantor.	PatientGuarantorReq	No
City	The city of the guarantor.	PatientGuarantorReq	No
State	The state of the guarantor.	PatientGuarantorReq	No
Country	The country of the guarantor (if different than the U.S.).	PatientGuarantorReq	No

ZipCode	The zip code of the guarantor.	PatientGuarantorReq	No
Employer	If employer ID matches an existing employer, then update the information. Otherwise, add a new employer.	PatientEmployerReq	
EmploymentStatus	The employment status of the patient.	PatientEmployerReq	No
EmployerID	The unique identifier of the employer related to this patient.	PatientEmployerReq	
EmployerName	The name of the employer related to this patient.	PatientEmployerReq	
AddressLine1	The first address line of the employer.	PatientEmployerReq	No
AddressLine2	The second address line of the employer.	PatientEmployerReq	No
City	The city of the employer.	PatientEmployerReq	No
State	The state of the employer.	PatientEmployerReq	No
Country	The country of the employer (if different than the U.S.).	PatientEmployerReq	No
ZipCode	The zip code of the employer.	PatientEmployerReq	No
DefaultRenderingProvider	To select a specific provider, caller would provide one of the sub-fields below.	ProviderIdentifierDetailedReq	No
ProviderID	The unique identifier of the default rendering provider related to this patient.	ProviderIdentifierDetailedReq	No
ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	ProviderIdentifierDetailedReq	No
FullName	The name of the default rendering provider related to this patient.	ProviderIdentifierDetailedReq	No
PrimaryCarePhysician	To select a specific provider, caller would provide one of the sub-fields below.	PhysicianIdentifierReq	No
ProviderID	The unique identifier of the primary care physician related to this patient.	PhysicianIdentifierReq	No
ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	PhysicianIdentifierReq	No
FullName	The name of the primary care physician related to this patient.	PhysicianIdentifierReq	No
ReferringProvider	To select a specific provider, caller would provide one of the sub-fields below.	ProviderIdentifierReq	No
ProviderID	The unique identifier of the referring provider related to this patient.	ProviderIdentifierReq	No
ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	ProviderIdentifierReq	No
FullName	The name of the referring provider related to this patient.	ProviderIdentifierReq	No
DefaultServiceLocation	To select an existing default service location, caller would provide either the ID of name. Otherwise, a new service location is created with the information in the sub-fields below.	ServiceLocationReq	No
LocationID	The unique identifier of the default service location related to this patient.	ServiceLocationReq	No
LocationName	The name of the default service location related to this patient.	ServiceLocationReq	No
AddressLine1	The first address line of the default service location related to this patient.	ServiceLocationReq	No
AddressLine2	The second address line of the default service location related to this patient.	ServiceLocationReq	No

City	The city of the default service location related to this patient.	ServiceLocationReq	No
State	The state of the default service location related to this patient.	ServiceLocationReq	No
Country	The country of the default service location related to this patient.	ServiceLocationReq	No
ZipCode	The zip code of the default service location related to this patient.	ServiceLocationReq	No
BillingName	The billing name of the default service location related to this patient.	ServiceLocationReq	No
Phone	The phone number of the default service location related to this patient.	ServiceLocationReq	No
PhoneExt	The phone number extension of the default service location related to this patient.	ServiceLocationReq	No
FaxPhone	The fax number of the default service location related to this patient.	ServiceLocationReq	No
FaxPhoneExt	The fax number extension of the default service location related to this patient.	ServiceLocationReq	No
NPI	The national provider identifier for the service location.	ServiceLocationReq	No
FacilityIDType	The type of the facility.	ServiceLocationReq	No
FacilityID	The ID of the facility.	ServiceLocationReq	No
CLIANumber	The CLIA number of the facility.	ServiceLocationReq	No
POS	The place of service (POS) code of the facility.	ServiceLocationReq	No
Cases	Multiple cases may be specified.	PatientCaseCreateReq[]	No
Case	To add a case to a new patient, the caller would provide one or more of the sub-fields below and/or one or more of the sub-fields in each of the insurance policy section. Otherwise, no case is created.	PatientCaseCreateReq	No
ExternalID	The unique identifier of the case in a third-party software system (used for integration purposes).	PatientCaseCreateReq	No
Name	The name of the case related to this patient.	PatientCaseCreateReq	No
Description	The description of the case related to this patient.	PatientCaseCreateReq	No
ReferringProviderID	The unique identifier of the referring provider associated with the case related to this patient.	PatientCaseCreateReq	No
ReferringProviderFullName	The name of the referring provider associated with the case related to this patient.	PatientCaseCreateReq	No
SendPatientStatements	If patient statements should be sent for charges under the case related to this patient, then true. Otherwise, false.	PatientCaseCreateReq	No
PayerScenario	The payer scenario of the case related to this patient.	PatientCaseCreateReq	No
Condition		PatientCaseConditionReq	No
RelatedToAutoAccident	If the case for this patient is related to an auto-accident, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToAutoAccidentState	The state of the auto accident for the case related to this patient.	PatientCaseConditionReq	No
RelatedToEmployment	If the case for this patient is related to employment, then true. Otherwise, false.	PatientCaseConditionReq	No

RelatedToPregnancy	If the case for this patient is related to pregnancy, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToAbuse	If the case for this patient is related to abuse then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToOther	If the case for this patient is related to other, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToEPSDT	If the case for this patient is related to EPSDT, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToFamilyPlanning	If the case for this patient is related to family planning, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToEmergency	If the case for this patient is related to an emergency, then true. Otherwise, false.	PatientCaseConditionReq	No
Dates		PatientCaseDatesReq	No
InjuryStartDate	The start date of the injury of the case related to this patient.	PatientCaseDatesReq	No
InjuryEndDate	The end date of the injury of the case related to this patient.	PatientCaseDatesReq	No
SameorSimilarIllnessStartDate	The start date of the same or similar illness of the case related to this patient.	PatientCaseDatesReq	No
SameorSimilarIllnessEndDate	The end date of the same or similar illness of the case related to this patient.	PatientCaseDatesReq	No
DatesUnabletoWorkStartDate	The start date the patient was unable to work for the case related to this patient.	PatientCaseDatesReq	No
DatesUnabletoWorkEndDate	The end date the patient was unable to work for the case related to this patient.	PatientCaseDatesReq	No
DatesRelatedDisabilityStartDate	The start date of a disability for the case related to this patient.	PatientCaseDatesReq	No
DatesRelatedDisabilityEndDate	The end date of a disability for the case related to this patient.	PatientCaseDatesReq	No
RelatedHospitalizationStartDate	The start date of a hospitalization for the case related to this patient.	PatientCaseDatesReq	No
RelatedHospitalizationEndDate	The end date of a hospitalization for the case related to this patient.	PatientCaseDatesReq	No
LastMenstrualPeriodDate	The last menstrual period of the case related to this patient.	PatientCaseDatesReq	No
LastSeenDate	The date the patient was last seen for the case related to this patient.	PatientCaseDatesReq	No
ReferralDate	The referral date for the case related to this patient.	PatientCaseDatesReq	No
AcuteManifestationDate	The acute manifestation date of the case related to this patient.	PatientCaseDatesReq	No
LastX-RayDate	The last x-ray date of the case related to this patient.	PatientCaseDatesReq	No
AccidentDate	The accident date of the case related to this patient.	PatientCaseDatesReq	No
Insurance Policies	Multiple insurance policies may be added to a case.	InsurancePolicyCreateReq[]	No
Insurance Policy	To select an existing insurance company or insurance plan, caller would provide either the ID or the name. Otherwise, a new insurance company and/or insurance plan is created with the information in the sub-fields below. If none of the fields are provided, no primary insurance policy is created.	InsurancePolicyCreateReq	No
CompanyID	The unique identifier of the insurance company associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No

CompanyName	The name of the insurance company associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
PlanID	The unique identifier of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
PlanName	The name of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
ExternalID	The unique identifier of the insurance policy in a third-party software system (used for integration purposes).	InsurancePolicyCreateReq	No
AddressLine1	The first address line of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
AddressLine2	The second address line of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
City	The city of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
State	The state of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
Country	The country of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
ZipCode	The zip code of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
Adjuster		InsurancePolicyAdjusterReq	No
Prefix	The prefix of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
FirstName	The first name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
MiddleName	The middle name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
LastName	The last name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
Suffix	The suffix of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
PhoneNumber	The adjuster phone number with the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
PhoneNumberExt	The adjuster phone number extension with the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No

FaxNumber	The adjuster fax number with the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
FaxNumberExt	The adjuster fax number extension with the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
PolicyNumber	The policy number associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
PolicyGroupNumber	The group number associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
Copay	The copay associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
Deductible	The deductible associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
EffectiveStartDate	The effective start date associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
EffectiveEndDate	The effective end date associated with the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
Insured		InsurancePolicyInsuredReq	No
PatientRelationshipToInsured	The patient relationship to the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
Prefix	The prefix of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
FirstName	The first name of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
MiddleName	The middle name of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
LastName	The last name of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
Suffix	The suffix of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
AddressLine1	The first address line of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
AddressLine2	The second address line of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
City	The city of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
State	The state of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
Country	The country of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
ZipCode	The zip code of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No

IDNumber	The ID number of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
SocialSecurityNumber	The social security number of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
DateOfBirth	The date of birth of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
Gender	The gender of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
PolicyThroughEmployer	True if the insurance policy is through the patient's employer.	InsurancePolicyInsuredReq	No
Employer	The name of the employer related to the insurance policy.	InsurancePolicyInsuredReq	No
Active	True is insurance policy is active, otherwise false.	InsurancePolicyInsuredReq	No
Precedence	An integer value to set the precedence (e.g. primary=1, secondary=2, etc).	InsurancePolicyInsuredReq	No
PolicyNotes	The notes on the primary insurance policy on the case for this patient.	InsurancePolicyCreateReq	No
Authorizations	Multiple authorizations may be specified.	InsurancePolicyAuthorizationCreateReq[]	No
Authorization	The authorization number associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
InsurancePlanID	The insurance plan ID associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
InsurancePlanName	The insurance plan name associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
Number	The authorization number associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
NumberOfVisits	The number of visits authorized with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
NumberOfVisitsUsed	The number of visits used for the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
ContactFullName	The insurance contact name associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
ContactPhone	The insurance contact phone number associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
ContactPhoneExt	The insurance contact phone number extension associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
Notes	The authorization notes associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
StartDate	The start date associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
EndDate	The end date associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationCreateReq	No
Alert		PatientAlertReq	No
Message	The alert message related to this patient.	PatientAlertReq	No
ShowWhenDisplayingPatientDetails	True if the alert message related to this patient should show when displaying patient details. False otherwise.	PatientAlertReq	No

ShowWhenSchedulingAppointments	True if the alert message related to this patient should show when scheduling appointments. False otherwise.	PatientAlertReq	No
ShowWhenEnteringEncounters	True if the alert message related to this patient should show when entering encounters. False otherwise.	PatientAlertReq	No
ShowWhenViewingClaimDetails	True if the alert message related to this patient should show when viewing claim details. False otherwise.	PatientAlertReq	No
ShowWhenPostingPayments	True if the alert message related to this patient should show when posting payments. False otherwise.	PatientAlertReq	No
ShowWhenPreparingPatientStatements	True if the alert message related to this patient should show when preparing patient statements. False otherwise.	PatientAlertReq	No

5.11.2 The Response

The following information will returned with the response for this operation.

Field Name	Description
PatientID	The unique identifier of the new patient that was created.
PatientExternalID	The unique identifier of the patient in a third-party software system (used for integration purposes).
PracticeID	The unique identifier of the practice associated with this new patient.
PracticeExternalID	The unique identifier of the practice in a third-party software system (used for integration purposes).
PracticeName	The name of the practice associated with this new patient.
EmployerID	The unique identifier of the employer.
DefaultServiceLocationID	The unique identifier of the default service location.
Cases	Section includes information about cases created.
Case	Section may repeat if multiple cases were created.
CaseID	The unique identifier of the case is returned.
CaseExternalID	The unique identifier of the case in a third-party software system (used for integration purposes).
Insurance Policies	Section includes information about insurance policies created.
InsurancePolicyCompanyID	The unique identifier of the insurance company related to the primary insurance policy.
InsurancePolicyPlanID	The unique identifier of the insurance plan related to the primary insurance policy.
InsurancePolicyID	The unique identifier of the primary insurance policy.
InsurancePolicyExternalID	The unique identifier of the insurance policy in a third-party software system (used for integration purposes).
Authorizations	Section includes information about authorizations created.
Authorization	Section may repeat if multiple authorizations were created.
AuthorizationID	The unique identifier of the authozation created.
InsurancePolicyID	The unique identifier of the insurance policy related to the authorization.

5.12 Create Encounter

This operation creates a new encounter with the information included within the request.

5.12.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Strongly-Typed Object	Required
Practice	To select a practice, caller would provide one of the sub-fields below.	PracticeIdentifierReq	Yes

PracticeID	The unique identifier associated with the practice related to this encounter.	PracticeIdentifierReq	
PracticeExternalID	The unique identifier of the practice in a third-party software system (used for integration purposes).	PracticeIdentifierReq	
PracticeName	The name of the practice related to this encounter.	PracticeIdentifierReq	
Appointment	To select an appointment, caller would provide one of the sub-fields below.	AppointmentIdentifierReq	No
AppointmentID	The unique identifier of the appointment (i.e. the “ticket number”)	AppointmentIdentifierReq	
AppointmentExternalID	The unique identifier of the appointment in a third-party software system (used for integration purposes).	AppointmentIdentifierReq	
Patient	To select a patient, caller would provide one or more of the sub-fields below.	PatientIdentifierReq	Yes
PatientID	The unique identifier of the patient related to this encounter.	PatientIdentifierReq	
PatientExternalID	The unique identifier of the patient in a third-party software system (used for integration purposes).	PatientIdentifierReq	
Prefix	The prefix of the patient related to this encounter.	PatientIdentifierReq	
FirstName	The first name of the patient related to this encounter.	PatientIdentifierReq	
MiddleName	The middle name of the patient related to this encounter.	PatientIdentifierReq	
LastName	The last name of the patient related to this encounter.	PatientIdentifierReq	
Suffix	The suffix of the patient related to this encounter.	PatientIdentifierReq	
Case	To select a case, caller would provide one of the sub-fields below.	PatientCaseIdentifierReq	Yes
CaseID	The unique identifier of the case related to this encounter.	PatientCaseIdentifierReq	
CaseExternalID	The unique identifier of the case in a third-party software system (used for integration purposes).	PatientCaseIdentifierReq	
CaseName	The name of the case related to this encounter.	PatientCaseIdentifierReq	
CasePayerScenario	The payer scenario of the case related to this encounter.	PatientCaseIdentifierReq	
ServiceStartDate	The service start date of this encounter.	EncounterCreate	Yes
ServiceEndDate	The service end date of this encounter.	EncounterCreate	No
PostDate	The post date of this encounter	EncounterCreate	Yes
BatchNumber	The batch number associated with this encounter.	EncounterCreate	No
SchedulingProvider	To select a provider, caller would provide one or more of the sub-fields below.	ProviderIdentifierDetailedReq	No
ProviderID	The unique identifier of the scheduling provider related to this encounter.	ProviderIdentifierDetailedReq	
ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	ProviderIdentifierDetailedReq	
Prefix	The prefix of the scheduling provider related to this encounter.	ProviderIdentifierDetailedReq	
FirstName	The first name of the scheduling provider related to this encounter.	ProviderIdentifierDetailedReq	
MiddleName	The middle name of the scheduling provider related to this encounter.	ProviderIdentifierDetailedReq	
LastName	The last name of the scheduling provider related to this encounter.	ProviderIdentifierDetailedReq	
Suffix	The suffix of the scheduling provider related to this encounter.	ProviderIdentifierDetailedReq	
RenderingProvider	To select a provider, caller would provide one or more of the sub-fields below.	ProviderIdentifierDetailedReq	No
ProviderID	The unique identifier of the rendering provider related to this encounter.	ProviderIdentifierDetailedReq	

ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	ProviderIdentifierDetailedReq	
Prefix	The prefix of the rendering provider related to this encounter.	ProviderIdentifierDetailedReq	
FirstName	The first name of the rendering provider related to this encounter.	ProviderIdentifierDetailedReq	
MiddleName	The middle name of the rendering provider related to this encounter.	ProviderIdentifierDetailedReq	
LastName	The last name of the rendering provider related to this encounter.	ProviderIdentifierDetailedReq	
Suffix	The suffix of the rendering provider related to this encounter.	ProviderIdentifierDetailedReq	
SupervisingProvider	To select a provider, caller would provide one or more of the sub-fields below.	ProviderIdentifierDetailedReq	No
ProviderID	The unique identifier of the supervising provider related to this encounter.	ProviderIdentifierDetailedReq	
ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	ProviderIdentifierDetailedReq	
Prefix	The prefix of the supervising provider related to this encounter.	ProviderIdentifierDetailedReq	
FirstName	The first name of the supervising provider related to this encounter.	ProviderIdentifierDetailedReq	
MiddleName	The middle name of the supervising provider related to this encounter.	ProviderIdentifierDetailedReq	
LastName	The last name of the supervising provider related to this encounter.	ProviderIdentifierDetailedReq	
Suffix	The suffix of the supervising provider related to this encounter.	ProviderIdentifierDetailedReq	
ReferringProvider	To select a provider, caller would provide one or more of the sub-fields below.	ProviderIdentifierDetailedReq	No
ProviderID	The unique identifier of the referring provider related to this encounter.	ProviderIdentifierDetailedReq	
ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	ProviderIdentifierDetailedReq	
Prefix	The prefix of the referring provider related to this encounter.	ProviderIdentifierDetailedReq	
FirstName	The first name of the referring provider related to this encounter.	ProviderIdentifierDetailedReq	
MiddleName	The middle name of the referring provider related to this encounter.	ProviderIdentifierDetailedReq	
LastName	The last name of the referring provider related to this encounter.	ProviderIdentifierDetailedReq	
Suffix	The suffix of the referring provider related to this encounter.	ProviderIdentifierDetailedReq	
ServiceLocation	To select a service location, caller would provide one of the sub-fields below.	ServiceLineReq	Yes
LocationID	The unique identifier of the service location related to this encounter.	ServiceLineReq	
LocationName	The name of the service location related to this encounter.	ServiceLineReq	
PlaceOfService	To select place of service, caller would provide one of the sub-fields below.	EncounterPlaceOfService	No
PlaceOfServiceCode	The place of service code related to this encounter.	EncounterPlaceOfService	No
PlaceOfServiceName	The place of service name related to this encounter.	EncounterPlaceOfService	No
Payment	Used when a payment is collected with the encounter (copay for example).	EncounterPayment	No
AmountPaid	The amount paid.	Encounter Payment	No

PaymentMethod	The method used for payment (Cash, ElectronicFundsTransfer, Check, Other, CreditCard, Unknown).	EncounterPayment	No
ReferenceNumber	The reference number for this payment.	EncounterPayment	No
Description	The description for this payment.	EncounterPayment	No
Category	The text matching an existing category in Kareo.	EncounterPayment	No
Hospitalization	The hospitalization dates related to the encounter.	EncounterHospitalization	No
StartDate	The hospitalization start date related to this encounter.	EncounterHospitalization	No
EndDate	The hospitalization end date related to this encounter.	EncounterHospitalization	No
Miscellaneous		EncounterMiscellaneous	
LocalUseBox10d	The local use box 10d custom insurance field related to this encounter.	EncounterMiscellaneous	No
LocalUseBox19	The local use box 19 custom insurance field related to this encounter.	EncounterMiscellaneous	No
DoNotSendClaimElectronically	True if the claim should not be sent electronically. False otherwise.	EncounterMiscellaneous	No
DoNotSendElectronicallyToSecondary	True if the claim should not be sent electronically to the secondary insurance. False otherwise.	EncounterMiscellaneous	No
E-ClaimNoteType	The line note related to this encounter.	EncounterMiscellaneous	No
E-ClaimNote	The line note related to this encounter.	EncounterMiscellaneous	No
MedicalOfficeNotes	The notes entered into the medical office notes field.	EncounterCreate	No
BusinessOfficeNotes	The notes entered into the medical office notes field.	EncounterCreate	No
Service Lines		ServiceLineReq[]	
ServiceLine	This section shall be repeated for each charge.	ServiceLineReq	
EncounterProcedureExternalID	The unique identifier of the service line in a third-party software system (used for integration purposes).	ServiceLineReq	
ServiceStartDate	The service start date of this charge.	ServiceLineReq	Yes
ServiceEndDate	The service end date of this charge.	ServiceLineReq	No
ProcedureCode	The procedure code related to this charge.	ServiceLineReq	Yes
ProcedureModifier1	The first modifier of the procedure related to this charge.	ServiceLineReq	No
ProcedureModifier2	The second modifier of the procedure related to this charge.	ServiceLineReq	No
ProcedureModifier3	The third modifier of the procedure related to this charge.	ServiceLineReq	No
ProcedureModifier4	The fourth modifier of the procedure related to this charge.	ServiceLineReq	No
DiagnosisCode1	The first diagnosis code related to this charge.	ServiceLineReq	Yes
DiagnosisCode2	The second diagnosis code related to this charge.	ServiceLineReq	No
DiagnosisCode3	The third diagnosis code related to this charge.	ServiceLineReq	No
DiagnosisCode4	The fourth diagnosis code related to this charge.	ServiceLineReq	No
Units	The number of units of the procedure related to this charge.	ServiceLineReq	Yes
UnitCharge	The unit charge of the procedure related to this charge.	ServiceLineReq	No
Minutes	The minutes of the procedure related to this charge.	ServiceLineReq	No
LineNote	The line note of the procedure related to this charge.	ServiceLineReq	No
RefCode	The ref code of the procedure related to this charge.	ServiceLineReq	No
TypeofService	The type of service code of the procedure related to this charge.	ServiceLineReq	No
EncounterStatus	The status for this encounter (Draft, Submitted, Approved, Rejected, Unpayable)	EncounterCreate	No
ExternalID	The unique identifier of the encounter in a third-party software system (used for integration purposes).	EncounterCreate	No

5.12.2 The Response

The following information will returned with the response for this operation.

Field Name	Description
EncounterID	The unique identifier of the new encounter that was created.
EncounterExternalID	The unique identifier of the encounter in a third-party software system (used for integration purposes).
PracticeID	The unique identifier of the practice associated with this new encounter.
PracticeExternalID	The unique identifier of the practice in a third-party software system (used for integration purposes).
PracticeName	The name of the practice associated with this new encounter.
PatientID	The unique identifier of the patient related to this encounter.
PatientExternalID	The unique identifier of the patient in a third-party software system (used for integration purposes).
PatientCaseID	The unique identifier of the patient case.
PatientCaseExternalID	The unique identifier of the case in a third-party software system (used for integration purposes).
SchedulingProviderID	The unique identifier of the scheduling provider.
SchedulingProviderExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).
RenderingProviderID	The unique identifier of the rendering provider.
RenderingProviderExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).
SupervisingProviderID	The unique identifier of the supervising provider.
SupervisingProviderExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).
ReferringProviderID	The unique identifier of the referring provider.
ReferringProviderExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).
ServiceLocationID	The unique identifier of the service location.
ServiceLines	The items in this section may be repeated for each service line.
ServiceLineID	The unique identifier of the service line.
EncounterProcedureExternalID	The unique identifier of the service line in a third-party software system (used for integration purposes).

5.13 Update Patient

This operation updates an existing patient with the information included within the request. Note this is only available with the 2.0 interface and above.

5.13.1 The Request

The following information may be provided as parameters to the request for this operation.

Field Name	Description	Strongly-Typed Object	Required
CustomerKey	The customer key associated with your customer account.	RequestHeader	Yes
User	The username associated with the user account with authorized security permissions to the API.	RequestHeader	Yes
Password	The password associated with the user account with authorized security permissions to the API.	RequestHeader	Yes
Practice	To select a specific practice, caller would provide one of the sub-fields below.	PracticeIdentifierReq	Yes, if more than one practice
PracticeID	The unique identifier associated with the practice related to this patient.	PracticeIdentifierReq	
PracticeName	The name of the practice related to this patient.	PracticeIdentifierReq	

PracticeExternalID	The unique identifier of the practice in a third-party software system (used for integration purposes).	PracticeIdentifierReq	No
PatientID	The unique identifier of the patient	PatientUpdate	No
PatientExternalID	The unique identifier of the patient in a third-party software system (used for integration purposes).	PatientUpdate	No
Prefix	The prefix of the patient.	PatientUpdate	No
FirstName	The first name of the patient.	PatientUpdate	Yes
MiddleName	The middle name of the patient.	PatientUpdate	No
LastName	The last name of the patient.	PatientUpdate	Yes
Suffix	The suffix of the patient.	PatientUpdate	No
SocialSecurityNumber	The social security number of the patient.	PatientUpdate	No
DateOfBirth	The date of birth of the patient.	PatientUpdate	No
Gender	The gender of the patient.	PatientUpdate	No
MedicalRecordNumber	The medical record number for the patient.	PatientUpdate	No
MaritalStatus	The marital status of the patient. A = Annulled D = Divorced I = Interlocutory L = Legally Separated M = Married P = Polygamous S = Single/Never Married T = Domestic Partner W = Widowed	PatientUpdate	No
ReferralSource	The referral source of the patient.	PatientUpdate	No
AddressLine1	The first address line of the patient.	PatientUpdate	No
AddressLine2	The second address line of the patient.	PatientUpdate	No
City	The city of the patient.	PatientUpdate	No
State	The state of the patient.	PatientUpdate	No
Country	The country of the patient (if different than the U.S.).	PatientUpdate	No
ZipCode	The zip code of the patient.	PatientUpdate	No
HomePhone	The home phone number of the patient.	PatientUpdate	No
HomePhoneExt	The home phone number extension of the patient.	PatientUpdate	No
WorkPhone	The work phone number of the patient.	PatientUpdate	No
WorkPhoneExt	The work phone number extension of the patient.	PatientUpdate	No
MobilePhone	The mobile phone number of the patient.	PatientUpdate	No
MobilePhoneExt	The mobile phone number extension of the patient.	PatientUpdate	No
EmailAddress	The email address of the patient.	PatientUpdate	No
Note	An initial note on the patient record in the notes area.	PatientUpdate	No
CollectionCategoryName	The name of the collection category related to this patient.	PatientUpdate	No
Guarantor		PatientGuarantorReq	
DifferentThanPatient	True if guarantor is different than the patient.	PatientGuarantorReq	No
RelationshipToGuarantor	The patient relationship to the guarantor.	PatientGuarantorReq	No

GuarantorPrefix	The prefix of the guarantor if different than the patient.	PatientGuarantorReq	No
GuarantorFirstName	The first name of the guarantor if different than the patient.	PatientGuarantorReq	No
GuarantorMiddleName	The middle name of the guarantor if different than the patient.	PatientGuarantorReq	No
GuarantorLastName	The last name of the guarantor if different than the patient.	PatientGuarantorReq	No
GuarantorSuffix	The suffix of the guarantor if different than the patient.	PatientGuarantorReq	No
AddressLine1	The first address line of the guarantor.	PatientGuarantorReq	No
AddressLine2	The second address line of the guarantor.	PatientGuarantorReq	No
City	The city of the guarantor.	PatientGuarantorReq	No
State	The state of the guarantor.	PatientGuarantorReq	No
Country	The country of the guarantor (if different than the U.S.).	PatientGuarantorReq	No
ZipCode	The zip code of the guarantor.	PatientGuarantorReq	No
Employer	If employer ID matches an existing employer, then update the information. Otherwise, add a new employer.	PatientEmployerReq	
EmploymentStatus	The employment status of the patient.	PatientEmployerReq	No
EmployerID	The unique identifier of the employer related to this patient.	PatientEmployerReq	
EmployerName	The name of the employer related to this patient.	PatientEmployerReq	
AddressLine1	The first address line of the employer.	PatientEmployerReq	No
AddressLine2	The second address line of the employer.	PatientEmployerReq	No
City	The city of the employer.	PatientEmployerReq	No
State	The state of the employer.	PatientEmployerReq	No
Country	The country of the employer (if different than the U.S.).	PatientEmployerReq	No
ZipCode	The zip code of the employer.	PatientEmployerReq	No
DefaultRenderingProvider	To select a specific provider, caller would provide one of the sub-fields below.	ProviderIdentifierDetailedReq	No
ProviderID	The unique identifier of the default rendering provider related to this patient.	ProviderIdentifierDetailedReq	No
ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	ProviderIdentifierDetailedReq	No
FullName	The name of the default rendering provider related to this patient.	ProviderIdentifierDetailedReq	No
PrimaryCarePhysician	To select a specific provider, caller would provide one of the sub-fields below.	PhysicianIdentifierReq	No
ProviderID	The unique identifier of the primary care physician related to this patient.	PhysicianIdentifierReq	No
ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	PhysicianIdentifierReq	No
FullName	The name of the primary care physician related to this patient.	PhysicianIdentifierReq	No
ReferringProvider	To select a specific provider, caller would provide one of the sub-fields below.	ProviderIdentifierReq	No
ProviderID	The unique identifier of the referring provider related to this patient.	ProviderIdentifierReq	No

ExternalID	The unique identifier of the provider in a third-party software system (used for integration purposes).	ProviderIdentifierReq	No
FullName	The name of the referring provider related to this patient.	ProviderIdentifierReq	No
DefaultServiceLocation	To select an existing default service location, caller would provide either the ID of name. Otherwise, a new service location is created with the information in the sub-fields below.	ServiceLocationReq	No
LocationID	The unique identifier of the default service location related to this patient.	ServiceLocationReq	No
LocationName	The name of the default service location related to this patient.	ServiceLocationReq	No
AddressLine1	The first address line of the default service location related to this patient.	ServiceLocationReq	No
AddressLine2	The second address line of the default service location related to this patient.	ServiceLocationReq	No
City	The city of the default service location related to this patient.	ServiceLocationReq	No
State	The state of the default service location related to this patient.	ServiceLocationReq	No
Country	The country of the default service location related to this patient.	ServiceLocationReq	No
ZipCode	The zip code of the default service location related to this patient.	ServiceLocationReq	No
BillingName	The billing name of the default service location related to this patient.	ServiceLocationReq	No
Phone	The phone number of the default service location related to this patient.	ServiceLocationReq	No
PhoneExt	The phone number extension of the default service location related to this patient.	ServiceLocationReq	No
FaxPhone	The fax number of the default service location related to this patient.	ServiceLocationReq	No
FaxPhoneExt	The fax number extension of the default service location related to this patient.	ServiceLocationReq	No
NPI	The national provider identifier for the service location.	ServiceLocationReq	No
FacilityIDType	The type of the facility.	ServiceLocationReq	No
FacilityID	The ID of the facility.	ServiceLocationReq	No
CLIANumber	The CLIA number of the facility.	ServiceLocationReq	No
POS	The place of service (POS) code of the facility.	ServiceLocationReq	No
Cases	Multiple cases may be specified.	PatientCaseUpdateReq[]	No
Case	To add a case to a new patient, the caller would provide one or more of the sub-fields below and/or one or more of the sub-fields in each of the insurance policy section. Otherwise, no case is created.	PatientCaseUpdateReq	No
ExternalID	The unique identifier of the case in a third-party software system (used for integration purposes).	PatientCaseUpdateReq	No
Name	The name of the case related to this patient.	PatientCaseUpdateReq	No
Description	The description of the case related to this patient.	PatientCaseUpdateReq	No

ReferringProviderID	The unique identifier of the referring provider associated with the case related to this patient.	PatientCaseUpdateReq	No
ReferringProviderFullName	The name of the referring provider associated with the case related to this patient.	PatientCaseUpdateReq	No
SendPatientStatements	If patient statements should be sent for charges under the case related to this patient, then true. Otherwise, false.	PatientCaseUpdateReq	No
PayerScenario	The payer scenario of the case related to this patient.	PatientCaseUpdateReq	No
CaseCondition		PatientCaseConditionReq	No
RelatedToAutoAccident	If the case for this patient is related to an auto-accident, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToAutoAccidentState	The state of the auto accident for the case related to this patient.	PatientCaseConditionReq	No
RelatedToEmployment	If the case for this patient is related to employment, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToPregnancy	If the case for this patient is related to pregnancy, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToAbuse	If the case for this patient is related to abuse then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToOther	If the case for this patient is related to other, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToEPSDT	If the case for this patient is related to EPSDT, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToFamilyPlanning	If the case for this patient is related to family planning, then true. Otherwise, false.	PatientCaseConditionReq	No
RelatedToEmergency	If the case for this patient is related to an emergency, then true. Otherwise, false.	PatientCaseConditionReq	No
CaseDates		PatientCaseDatesReq	No
InjuryStartDate	The start date of the injury of the case related to this patient.	PatientCaseDatesReq	No
InjuryEndDate	The end date of the injury of the case related to this patient.	PatientCaseDatesReq	No
SameorSimilarIllnessStartDate	The start date of the same or similar illness of the case related to this patient.	PatientCaseDatesReq	No
SameorSimilarIllnessEndDate	The end date of the same or similar illness of the case related to this patient.	PatientCaseDatesReq	No
DatesUnabletoWorkStartDate	The start date the patient was unable to work for the case related to this patient.	PatientCaseDatesReq	No
DatesUnabletoWorkEndDate	The end date the patient was unable to work for the case related to this patient.	PatientCaseDatesReq	No
DatesRelatedDisabilityStartDate	The start date of a disability for the case related to this patient.	PatientCaseDatesReq	No
DatesRelatedDisabilityEndDate	The end date of a disability for the case related to this patient.	PatientCaseDatesReq	No
RelatedHospitalizationStartDate	The start date of a hospitalization for the case related to this patient.	PatientCaseDatesReq	No
RelatedHospitalizationEndDate	The end date of a hospitalization for the case related to this patient.	PatientCaseDatesReq	No
LastMenstrualPeriodDate	The last menstrual period of the case related to this patient.	PatientCaseDatesReq	No
LastSeenDate	The date the patient was last seen for the case related to this patient.	PatientCaseDatesReq	No
ReferralDate	The referral date for the case related to this patient.	PatientCaseDatesReq	No

AcuteManifestationDate	The acute manifestation date of the case related to this patient.	PatientCaseDatesReq	No
LastX-RayDate	The last x-ray date of the case related to this patient.	PatientCaseDatesReq	No
AccidentDate	The accident date of the case related to this patient.	PatientCaseDatesReq	No
Insurance Policies	Multiple insurance policies may be added to a case.	InsurancePolicyUpdateReq[]	No
Insurance Policy	To select an existing insurance company or insurance plan, caller would provide either the ID or the name. Otherwise, a new insurance company and/or insurance plan is created with the information in the sub-fields below. If none of the fields are provided, no primary insurance policy is created.	InsurancePolicyUpdateReq	No
CompanyID	The unique identifier of the insurance company associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
CompanyName	The name of the insurance company associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
PlanID	The unique identifier of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
PlanName	The name of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
ExternalID	The unique identifier of the insurance policy in a third-party software system (used for integration purposes).	InsurancePolicyUpdateReq	No
AddressLine1	The first address line of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
AddressLine2	The second address line of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
City	The city of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
State	The state of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
Country	The country of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
ZipCode	The zip code of the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
Adjuster		InsurancePolicyAdjusterReq	No
Prefix	The prefix of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
FirstName	The first name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
MiddleName	The middle name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No

LastName	The last name of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
Suffix	The suffix of the adjuster for the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
PhoneNumber	The adjuster phone number with the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
PhoneNumberExt	The adjuster phone number extension with the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
FaxNumber	The adjuster fax number with the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
FaxNumberExt	The adjuster fax number extension with the insurance plan associated with the primary insurance policy on the case for this patient.	InsurancePolicyAdjusterReq	No
PolicyNumber	The policy number associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
PolicyGroupNumber	The group number associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
Copay	The copay associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
Deductible	The deductible associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
EffectiveStartDate	The effective start date associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
EffectiveEndDate	The effective end date associated with the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
Insured		InsurancePolicyInsuredReq	No
PatientRelationshipToInsured	The patient relationship to the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
Prefix	The prefix of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
FirstName	The first name of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
MiddleName	The middle name of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
LastName	The last name of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
Suffix	The suffix of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
AddressLine1	The first address line of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No

AddressLine2	The second address line of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
City	The city of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
State	The state of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
Country	The country of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
ZipCode	The zip code of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
IDNumber	The ID number of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
SocialSecurityNumber	The social security number of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
DateofBirth	The date of birth of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
Gender	The gender of the insured associated with the primary insurance policy on the case for this patient.	InsurancePolicyInsuredReq	No
PolicyThroughEmployer	True if the insurance policy is through the patient's employer.	InsurancePolicyInsuredReq	No
Employer	The name of the employer related to the insurance policy.	InsurancePolicyInsuredReq	No
Active	True is insurance policy is active, otherwise false.	InsurancePolicyInsuredReq	No
Precedence	An integer value to set the precedence (e.g. primary=1, secondary=2, etc).	InsurancePolicyInsuredReq	No
PolicyNotes	The notes on the primary insurance policy on the case for this patient.	InsurancePolicyUpdateReq	No
Authorizations	Multiple authorizations may be specified.	InsurancePolicyAuthorizationUpdateReq[]	No
Authorization	The authorization number associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
InsurancePlanID	The insurance plan ID associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
InsurancePlanName	The insurance plan name associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
Number	The authorization number associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
NumberOfVisits	The number of visits authorized with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
NumberOfVisitsUsed	The number of visits used for the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
ContactFullName	The insurance contact name associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
ContactPhone	The insurance contact phone number associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No

ContactPhoneExt	The insurance contact phone number extension associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
Notes	The authorization notes associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
StartDate	The start date associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
EndDate	The end date associated with the first authorization entered for this patient.	InsurancePolicyAuthorizationUpdateReq	No
Alert		PatientAlertReq	No
Message	The alert message related to this patient.	PatientAlertReq	No
ShowWhenDisplayingPatientDetails	True if the alert message related to this patient should show when displaying patient details. False otherwise.	PatientAlertReq	No
ShowWhenSchedulingAppointments	True if the alert message related to this patient should show when scheduling appointments. False otherwise.	PatientAlertReq	No
ShowWhenEnteringEncounters	True if the alert message related to this patient should show when entering encounters. False otherwise.	PatientAlertReq	No
ShowWhenViewingClaimDetails	True if the alert message related to this patient should show when viewing claim details. False otherwise.	PatientAlertReq	No
ShowWhenPostingPayments	True if the alert message related to this patient should show when posting payments. False otherwise.	PatientAlertReq	No
ShowWhenPreparingPatientStatements	True if the alert message related to this patient should show when preparing patient statements. False otherwise.	PatientAlertReq	No

5.13.2 The Response

The following information will returned with the response for this operation.

Field Name	Description
PatientID	The unique identifier of the new patient that was updated.
PatientExternalID	The unique identifier of the patient in a third-party software system (used for integration purposes).
PracticeID	The unique identifier of the practice associated with this new patient.
PracticeExternalID	The unique identifier of the practice in a third-party software system (used for integration purposes).
PracticeName	The name of the practice associated with this new patient.
EmployerID	The unique identifier of the employer.
DefaultServiceLocationID	The unique identifier of the default service location.
Cases	Section includes information about cases updated.
Case	Section may repeat if multiple cases were updated.
CaseID	The unique identifier of the case is returned.
CaseExternalID	The unique identifier of the case in a third-party software system (used for integration purposes).
Insurance Policies	Section includes information about insurance policies updated.
InsurancePolicyCompanyID	The unique identifier of the insurance company related to the primary insurance policy.
InsurancePolicyPlanID	The unique identifier of the insurance plan related to the primary insurance policy.
InsurancePolicyID	The unique identifier of the primary insurance policy.
InsurancePolicyExternalID	The unique identifier of the insurance policy in a third-party software system (used for integration purposes).
Authorizations	Section includes information about authorizations updated.
Authorization	Section may repeat if multiple authorizations were updated.

AuthorizationID	The unique identifier of the authozation updated.
InsurancePolicyID	The unique identifier of the insurance policy related to the authorization.

6. API Support

If you have any technical questions about the Kareo web services API, or would like to request a test account, please [submit a webform inquiry](#).

7. Change History

This topic provides descriptions of the changes made throughout the various versions of the Kareo Web Services API.

7.1 Changes from Version 1.0 to 2.0

- Added UpdatePatient and GetPatient operations
- Renamed InsertPatient to CreatePatient and allowed multiple child record types to be saved
- Renamed InsertEncounter to CreateEncounter and allowed multiple child record types to be saved

7.2 Changes from Version 2.0 to 2.1

- Modified Get Patients operation's PatientFilter to allow filtering by FirstName, MiddleName, LastName, and SSN
- Modified Get Patient return type to allow include all cases, insurance policies, and insurance policy authorizations
- The following fields and types have been renamed:
 - All types ending with Request to Req (example: UpdatePatientRequest to UpdatePatientReq)
 - All types ending with Response to Resp (example: ModifyPatientResponse to ModifyPatientResp)
 - InsurancePolicyCreateReq type
 - PlanAddressLine1 to AddressLine1
 - PlanAddressLine2 to AddressLine2
 - PlanCity to City
 - PlanState to State
 - PlanCountry to Country
 - PlanZipCode to ZipCode
 - EncounterStatusCode type to EncounterStatuscode
- Removed Version from the RequestHeader type
- Renamed the main target namespace for the service from <http://tempuri.org/> to <http://www.kareo.com/api/schemas/>
- Renamed main service name from KareoServices_v2 to KareoServices as the version will be implied by the endpoint