

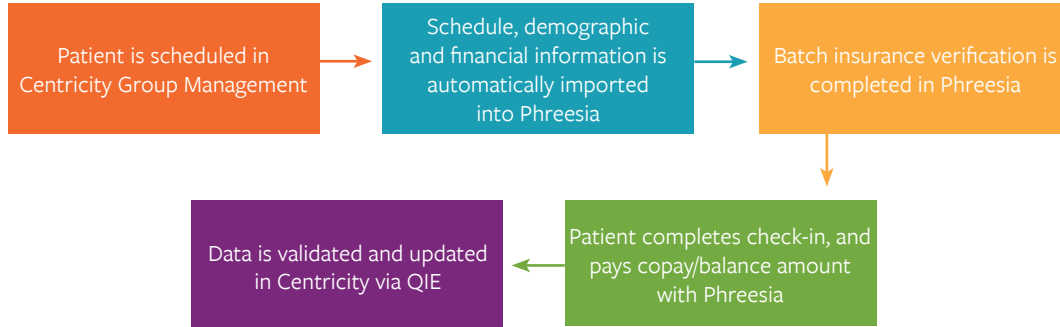
# Centricity Group Management Bidirectional Integration Summary

**Product Name:** Centricity Group Management

**Integration Type:** Bidirectional (Real-time)

## Workflow

Although the workflow is customized for each medical group's unique needs, a typical workflow with the Centricity Group Management integration is as follows:



## Integration Details - Included Fields

### Centricity Group Management → Phreesia

#### Appointment

Provider/Resource  
Time  
Appointment Type  
Appointment Location

#### Demographics

Name  
Home Address Line 1  
Home Address Line 2  
City, State, Zip  
Phone  
Cell Phone  
Email  
Gender  
DOB  
Marital Status  
SSN  
Race  
Language  
Ethnicity  
Preferred Contact Method  
Employer Name  
Employer Address  
Employer City, State, Zip

#### Emergency Contact

Emergency Contact Name  
Emergency Contact Relationship  
Emergency Contact Phone

#### Insurance

Primary Insurance Company  
Primary Insurance Policy ID  
Primary Insurance Group ID  
Primary Policy First Name  
Primary Policy Last Name  
Primary Policy Holder DOB  
Primary Policy Holder Relationship  
Secondary Policy First Name  
Secondary Policy Last Name  
Secondary Insurance Company  
Secondary Insurance Policy ID  
Secondary Insurance Group ID  
Secondary Policy Holder DOB  
Secondary Policy Holder Relationship

#### Guarantor (Account Level)

Guarantor Name  
Guarantor Address Line 1  
Guarantor Address Line 2  
Guarantor City/State/ZIP  
Guarantor Telephone  
Guarantor Email  
Guarantor Cell

#### Financial

Balance (Account-level, patient-level, bad-debt, or collection)  
Itemized Charges

### Phreesia → Centricity Group Management

#### Appointment

Patient arrival in Centricity Group Management

#### Demographics

Address Line 1  
Address Line 2  
City, State, Zip  
Primary/Home Phone  
Cell Phone  
Email  
Marital Status  
Race  
Language  
Ethnicity  
Preferred Contact Method

#### Guarantor (Account Level)

Guarantor Address Line 1  
Guarantor Address Line 2  
Guarantor City/State/ZIP  
Guarantor Telephone  
Guarantor Email  
Guarantor Cell Phone

#### Emergency Contact

Emergency Contact Name  
Emergency Contact Relationship  
Emergency Contact Phone

#### Financial

Payment Posting (available only with the GM Integration Tool Kit [WTK] and the GE Over The Counter [OTC] Payment Posting)