CentralReach

Advanced Business Intelligence Field Mapping

Below are tables explaining the attributes in each Advanced Business Intelligence dashboard and their location in CentralReach. Please note, more fields will be added and are subject to change.

Table of Contents

Scheduling

ABI Fields	UI Mapping	Description
Scheduling Course ID	Scheduling > View My Calendar > export scheduling appointments > Course	Internal scheduling transaction identifier at the course level. A course describes a grouping of appointments (events).
Scheduling Segment ID	Scheduling > View My Calendar > export scheduling appointments > Segment	Internal transaction identifier at the segment level. A segment is at the lowest level of a scheduling hierarchy and describes the work that is done during an appointment (event).
Scheduling Event ID	Scheduling > View My Calendar > export scheduling appointments > Event	An internal scheduling transaction identifier at the event level of a scheduling hierarchy, describing the day of the appointment (event).
Scheduling Date	Scheduling > View My Calendar > select an appointment > Date & Time	The date of the appointment.
Scheduling Change Date	Scheduling > View My Calendar > select appointment > Created/Last Change On	The new date of the appointment.
Scheduling Change Note	Scheduling > View My Calendar > export scheduling appointments > ChangeNote	Allows employees to state the reason for changing an established appointment.
Scheduling Segment Start Date Time	Scheduling > View My Calendar > export scheduling appointments > StartDateTime	The time a particular event started.
Scheduling Segment End Date Time	Scheduling > View My Calendar > export scheduling appointments > EndDateTime	The time a particular event ended.
Scheduling Segment Mins	Scheduling > View My Calendar > export scheduling appointments > SegmentMins	How many minutes the appointment is scheduled for.
Scheduling Segment Hours	Scheduling > View My Calendar > export scheduling	How many hours the appointment is scheduled for.

	appointments > SegmentHours	
Scheduling Event Start Date Time	Scheduling > View My Calendar > export scheduling appointments > EventStartDateTime	The time the appointment is scheduled to start.
Scheduling Event End Date Time	Scheduling > View My Calendar > export scheduling appointments > EventEndDateTime	The time the appointment is scheduled to end.
Scheduling Event Mins	Scheduling > View My Calendar > export scheduling appointments > EventMins	The appointment length in minutes.
Scheduling Event Hours	Scheduling > View My Calendar > export scheduling appointments > EventHours	The appointment length in hours.
Scheduling Course Start Date	Scheduling > View My Calendar > export scheduling appointments > CourseStartDate	The date the appointment series starts.
Scheduling Course End Date	Scheduling > View My Calendar > export scheduling appointments > CourseEndDate	The date the appointment series ends.
Scheduling Repeats	Scheduling > View My Calendar > export scheduling appointments > Repeats	If the appointment repeats.
Scheduling Is Active	Scheduling > View My Calendar > export scheduling appointments > IsActive	Indicates the status of the scheduled event.
Scheduling Segment Is Active	Scheduling > View My Calendar > export scheduling appointments > IsActive	Describes if the segment is active.
Scheduling Provider ID	Scheduling > View My Calendar > select an appointment > Primary Provider	The provider's CR ID number.
Scheduling Provider Name	Scheduling > View My Calendar > select an appointment > Primary Provider	The name of the provider in the appointment.
Scheduling Client ID	Scheduling > View My Calendar > select an appointment > Appointment with	The CR ID number of the client the appointment is scheduled for.

Scheduling Client Name	Scheduling > View My Calendar > select an appointment > Appointment with	The name of the client the appointment is scheduled for.
Scheduling Is Convertible	Scheduling > View My Calendar > export scheduling appointments > IsConvertable	Describes if the appointment is convertible.
Scheduling Converted To Timesheet	Scheduling > View My Calendar > export scheduling appointments > ConvertedToTimesheet	If the appointment was completed and converted to a timesheet.
Scheduling Billing Entry	Scheduling > View My Calendar > export scheduling appointments > BillingEntry	The billing entry that is created after the appointment has been converted.
Scheduling Auth	Scheduling > View My Calendar > export scheduling appointments > Auth	References the authorization number.
Scheduling Reason	Scheduling > View My Calendar > export scheduling appointments > Reason	The reason for changing the appointment.
Scheduling Deleted	Scheduling > View My Calendar > export scheduling appointments > Deleted	A deleted appointment.
Scheduling Deleted On	Scheduling > View My Calendar > export scheduling appointments > DeletedOn	The date the appointment was deleted.
Scheduling Deleted By	Scheduling > View My Calendar > export scheduling appointments > DeletedBy	The user that deleted the appointment.
Scheduling Cancelled	Scheduling > View My Calendar > export scheduling appointments > Cancelled	Describes if the appointment was cancelled.
Scheduling Cancelled On	Scheduling > View My Calendar > export scheduling appointments > CancelledOn	The date the appointment was cancelled.
Scheduling Cancelled By	Scheduling > View My Calendar > export scheduling appointments > CancelledBy	The user that cancelled the appointment.

Scheduling Name	Scheduling > View My Calendar > export scheduling appointments > Name	The appointment's name.
Scheduling Description	Scheduling > View My Calendar > export scheduling appointments > Description	The appointment's description.
Scheduling Location	Scheduling > View My Calendar > export scheduling appointments > Location	The appointment's address.
Scheduling Place Of Service Code	Scheduling > View My Calendar > export scheduling appointments > PlaceOfService	The number associated with the place of service.
Scheduling Place Of Service Name	Scheduling > View My Calendar > export scheduling appointments > PlaceOfServiceName	The name in CentralReach for the Place of Service.
Scheduling Drive Time	Scheduling > View My Calendar > export scheduling appointments > DriveTime	The provider's travel time to perform a service.
Scheduling Mileage	Scheduling > View My Calendar > select an appointment > Drive Info (optional) MIs	The amount of miles the provider has to drive.
Scheduling Type	Scheduling > View My Calendar > select an appointment > Appointment Type	The type of appointment, such as Direct Therapy or PTO.
Scheduling Type Name	Scheduling > View My Calendar > select an appointment > Appointment Name	The type of appointment.
Scheduling Attendance	Scheduling > Attendance	Tracks clients' attendance in group or classroom settings.
Scheduling Excused	Scheduling > View My Calendar > export scheduling appointments > Excused	Describes if the client's absence is excused.
Scheduling Present	Scheduling > View My Calendar > export scheduling appointments > Present	Describes if the client attended the appointment.

Scheduling Other	Scheduling > View My Calendar > export scheduling appointments > Other	A reason code that is unrelated to Present, Excused, or Unexcused absences.
Scheduling Reason Code	Scheduling > View My Calendar > export scheduling appointments > ReasonCode	Reason codes associated with client attendance, which are used to track excused or unexcused absences.
Scheduling Reason Name	Scheduling > View My Calendar > export scheduling appointments > ReasonName	The name of the reason code.
Scheduling Reason Comment	Scheduling > View My Calendar > export scheduling appointments > ReasonComment	Additional comments added to the reason code, pertaining to attendance type.
Scheduling Cancellation Type	Scheduling > Settings > Cancellation Reasons > Cancellation Type	The following values, Provider, Client, Other.
Scheduling Cancelled Reason	Scheduling > Settings > Cancellation Reasons > Cancellation Reason	The reason the appointment was cancelled.
Billing Code	Scheduling > View My Calendar > select an appointment > Authorization & Billing section > + Add > Codes > Use This (next to the code)	The service code for the scheduled appointment.
Scheduling Location Name	Scheduling > View My Calendar > select an appointment > Location/Address	The name in CR of the service location.
Scheduling Location Address Line 1	Scheduling > View My Calendar > select an appointment > Location Details > Location/Address > Add > Address line 1	The first line of the service location's address.
Scheduling Location Address Line 2	Scheduling > View My Calendar > select an appointment > Location Details > Location/Address > Add > Address line 2	The second line of the service location's address.
Scheduling Location City	Scheduling > View My Calendar > select an appointment >	The city of the service location.

	Location Details > Location/Address > Add > City	
Scheduling Location State	Scheduling > View My Calendar > select an appointment > Location Details > Location/Address > Add > US address? > State	The state of the service location.
Scheduling Location Zip Postal Code	Scheduling > View My Calendar > select an appointment > Location Details > Location/Address > Add > Zip-postal code	The zip code of the service location.
Scheduling Series Creator	N/A	N/A
Scheduling Event Participant	Scheduling > View My Calendar > select an appointment > Additional Participants	The other user participating in the appointment. Additional participants do not convert the appointment to a timesheet.
Scheduling Course Create Date	N/A	N/A

Claims

ABI Fields	UI Mapping	Description
Procedure Code	Claims > Actions > Edit > Services > Service Lines > Procedures, Service, Modifiers	The service code associated with the appointment.
Place Of Service Id	Billing > filter for the billing entry > Options > Edit Timesheet > Place of Service	The Place of Service's CR ID number.
Claim Archived Date	Claims > Archived > Archived	The date the claim was archived.
Billing Entry Service Date	Claims > Actions > Edit > Services > Service Lines > Service Date	The date the service was performed.
Claim Entry Date	Claims > Created	The date the claim was created in CR.
Billing Entry Service Start Time	Billing > filter for the billing entry > Options > Edit Timesheet > Time Worked	The time the appointment started.

Claim Archived Time	Claims > Actions > Archived > History > Claim History	The time the claim was archived.
Claim Id	Claims > Id	The claim's CR ID number.
Billing Entry Charges	Claims > Actions > Edit > Services > Service Lines > Charges	The cost of services.
Units	Claims > Actions > Edit > Services > Service Lines > Units	The number of times the service was provided.
Billing Entry Id	Claims > Actions > Edit > Services > Service Lines > Billing Entry	The billing entry's CR ID number.

ClaimLabel

ABI Fields	UI Mapping	Description
Claim Label Name	Claims > Labels	The name of a label assigned to a claim.

ClaimAttribute

ABI Field	UI Mapping	Description
Submission Type	Claims > Actions drop-down > Edit > Claim tab > Details > Submission Reason	The reason the claim was submitted (E.g. A new claim or a correction).
Unit Qualifier	Claims > Action drop-down > Edit > Providers > Billing tab > Secondary Qualifiers section > Secondary ID Qualifier	The unit of work that is in a claim.
Unit Qualifier Code		The unit of work that is in a claim.
Payor Responsibility	Claims > Action drop-down > Edit > Patient > Insurance tab > Payor Responsibility	The responsibility type on a claim, such as primary, secondary, or tertiary.

Contact Label

ABI Fields	UI Mapping	Description

Contact Label Name	Contacts > Label	The label(s) associated with each contact.

Contact Meta Data

ABI Fields	UI Mapping	Description
Meta Data Field Name	Contacts > Utilities & Tools > Meta-data Settings > Field Title	The name of the meta data.
Meta Data Field Value	Contacts > Clients > select a client > Profile > Meta Data > the answer fields on the right-hand side	The meta data field answers.

Payor

ABI Fields	UI Mapping	Description
Payor Plan Name	Billing > Options drop-down > Edit Timesheet > Choose a Payor (left-hand side)	The name of the insurance plan.
Payor Name	Billing > Options drop-down > Edit Timesheet > Choose a Payor (left-hand side)	The name of the insurance company.

Place of Service

ABI Fields	UI Mapping	Description
POS Code	Billing > Location	The number associated with the Place of Service.
POS Name	Billing > Location	The Place of Service's name.

TimeBilling

ABI Fields	UI Mapping	Description
Time Billing Client ID	Billing > Billing > Edit Timesheet > Client ID	A client's identification number.

TimeBilling Payor Plan ID	Billing > Billing > Payor	The payor's CR ID number in the billing entry.
TimeBilling Provider ID	Billing > Billing > Providers	The provider's CR ID number in the billing entry.
TimeBilling Service Code ID	Billing > Billing > Service/ Auth	The service code's CR ID number in the billing entry.
TimeBilling Service Facility ID	Billing > Billing > Edit Timesheet > service facility	The service facility's CR ID number in the billing entry.
TimeBilling Created On	Billing > Billing > Options > Preview Entry > History	The date the billing entry was created.
TimeBilling Entry Date	Billing > Billing > Options > Preview Entry > Overview tab > date	The date the billing entry was created in CR.
TimeBilling Service Date	Billing > Billing > Options > Edit Timesheet > Date of service	The service date of the appointment.
TimeBilling Void Date	Billing > Billing > Void > Options > Voided on	The date the billing transaction was voided.
TimeBilling Deleted Date	Billing > Billing > Filters > Status > Entry Status > Deleted only > Date	The date the billing entry was deleted.
TimeBilling Creation Time	Billing > Billing > Options > Preview Entry > History	The time a billing entry was created in CR.
TimeBilling Service Start Time	Billing > Billing > Options > Edit Timesheet > Time Worked	The time the service started.
TimeBilling Service End Time	Billing > Billing > Options > Edit Timesheet > Time Worked	The time the service ended.
TimeBilling Void Time	Billing > Billing > Options > Preview Entry > History	The time the billing entry was voided.
TimeBilling ID	Billing > Billing > Options > Entry ID	The billing entry's CR ID number.
TimeBilling Service Units	Billing > Billing > Options > Edit Timesheet > Units of	The units of service.

	Service	
TimeBilling Drive Time	Billing > Billing > Drive	The drive time in minutes.
TimeBilling Miles Driven	Billing > Billing > Drive > MIs	The miles a provider has driven.
TimeBilling Client Mileage Rate	Billing > Billing > Drive > Rate	The rate a client will be charged for the provider's driven mileage.
TimeBilling Client Service Rate	Billing > Billing > Options > Edit Timesheet > Client Rate > $ Rate	The rate a client will be charged for the service.
TimeBilling Client Agreed Service Rate	Billing > Billing > Options > Edit Timesheet > Agreed Rate > $ Rate	The service rate negotiated with the client.
TimeBilling Client Drive Rate	Billing > Billing > Options > Edit Timesheet > Client Rate > $ Drive	The rate a client will be charged for the provider's drive time.
TimeBilling Provider Mileage Rate	Billing > Billing > Options > Edit Timesheet > Provider Pay > $ Miles	The rate a provider will be paid for work miles.
TimeBilling Provider Drive Rate	Billing > Billing > Options > Edit Timesheet > Provider Pay > $ Drive	The rate a provider will be paid for drive time.
TimeBilling Provider Service Rate	Billing > Billing > Options > Edit Timesheet > Provider Pay > $ Rate	The rate a provider will be paid for service work.
TimeBilling Patient Responsibility Amount	Billing > Billing > Options > Edit Timesheet > Patient Responsibility	The patient's copay for a billing transaction.
Client Charges Total	Billing > Billing > Charges > Billed	The total standard billable charges.
Client Charges Agreed Total	Billing > Billing > Charges > Charges > Agreed	The total contracted billable charges.
TimeBilling First Billed Date	Billing > Billing > export the billing grid > FirstBillDate	The date the services were billed for.
TimeBilling Authorization ID	Billing > Billing > Options > Edit Timesheet > Authorization	The authorization's CR ID number.

TimeBilling Modifier Code 1	Billing > Billing > Options > Edit Timesheet > Modifier #1	The first modifier code field.
TimeBilling Modifier Code 2	Billing > Billing > Options > Edit Timesheet > Modifier #2	The second modifier code field.
TimeBilling Modifier Code 3	Billing > Billing > Options > Edit Timesheet > Modifier #3	The third modifier code field.
TimeBilling Modifier Code 4	Billing > Billing > Options > Edit Timesheet > Modifier #4	The fourth modifier code field.
TimeBilling Modifier Description 1	Billing > Billing > Options > Edit Timesheet > Modifier #1	The modifier's description.
TimeBilling Modifier Description 2	Billing > Billing > Options > Edit Timesheet > Modifier #2	The modifier's description.
TimeBilling Modifier Description 3	Billing > Billing > Options > Edit Timesheet > Modifier #3	The modifier's description.
TimeBilling Modifier Description 4	Billing > Billing > Options > Edit Timesheet > Modifier #4	The modifier's description.
TimeBilling Create Date	Billing > Billing > Options > Preview Entry > History	The date the billing entry was created.
TimeBilling Modify Date	Billing > billing > Options > Edit Timesheet	Modifications made to the billing entry.
TimeBilling AR Age	Billing > Receivables Report	The aging of accounts receivable based on the time an invoice has been unpaid.
TimeBilling AR Buckets	Billing > Receivables Report	The time periods users can review debt items that are past due.

TimeBilling Label

ABI Fields	UI Mapping	Description
TimeBilling Label ID	Billing > Billing > Labels	The label(s) associated with the billing entry.
TimeBilling Label Name	Billing > Billing > Labels	The name of the label(s) associated with the billing entry.

Client

ABI Fields	UI Mapping	Description
Client Full Name	Contacts > Clients > Name	The client's full name.
Client Last Name	Contacts > Clients > select a client > Profile > Basics > Last Name	The client's last name.
Client First Name	Contacts > Clients > select a client > Profile > Basics > First Name	The client's first name.
Client Middle Initial	Contacts > Clients > select a client > Profile > Basics > MI	The client's middle initial.
Client Guardian Last Name	Contacts > Clients > select a client > Profile > Basics > Parent/Guardian Last Name	The guardian's last name.
Client Guardian First Name	Contacts > Clients > select a client > Profile > Basics > Parent/Guardian First Name	The guardian's first name.
Client Gender	Contacts > Clients > select a client > Profile > Basics > Gender	The client's gender.
Client Marital Status	Contacts > Clients > select a client > Profile > Basics > Marital Status	The client's marital status.
Client Active Status	Contacts > Clients > select a client > Profile > Basics > Status	Describes if the client is an active contact in CentralReach.
Client Birth Date	Contacts > Clients > select a client > Profile > Basics > DOB	The client's birth date.
Client Email	Contacts > Clients > select a client > Profile > Basics > E-mail	The client's email address.
Client Mailing Address Line 1	Contacts > Clients > select a client > Profile > Basics > Address > Address	The first line of the client's address.
Client Mailing Address Line 2	Contacts > Clients > select a client > Profile > Basics >	The second line of the client's address.

	Address > Address #2	
Client Mailing Postal Code	Contacts > Clients > select a client > Profile > Basics > Address > Zip/Postal Code	The client's zip code.
Client Mailing City	Contacts > Clients > select a client > Profile > Basics > Address > City	The city the client resides in.
Client Mailing County	Contacts > Clients > select a client > Profile > Basics > Address > Region	The county the client resides in.
Client Mailing State Province	Contacts > Clients > select a client > Profile > Basics > Address > State	The state the client resides in.
Client Mailing Country	Contacts > Clients > select a client > Profile > Basics > Address > Outside the US? > Country	The country the client resides in.
Client Office Address 1	In the org account > My Profile > EXT. Profile > Office Locations > select an address > Address	The service location's address line1.
Client Office Address 2	In the org account > My Profile > EXT. Profile > Office Locations > select an address > Address 2	The service location's address line2.
Client Office Postal Code	In the org account > My Profile > EXT. Profile > Office Locations > select an address > Zip/Postal Code	The service location's postal code.
Client Office City	In the org account > My Profile > EXT. Profile > Office Locations > select an address > City	The city the service location is in.
Client Office County	In the org account > My Profile > Basics > Address > State > Outside of US? > Region	The county the service location is in.
Client Office State Province	In the org account > My Profile > Basics > Address > State	The state the service location is in.

Client Office Country	In the org account > My Profile > Basics > Address > State > Outside of US? > Country	The country the service location is in.
Client Office Location Name	In the org account > My Profile > EXT. Profile > Office Locations > select an address > Office Name	The name of the service location.
Client Home Phone Number	Contacts > Clients > select a client > Profile > Basics > Address > Home	The client's home phone number.
Client Cell Phone Number	Contacts > Clients > select a client > Profile > Basics > Address > Cell	The client's cell phone number.
Client Payor Plan	Contacts > Clients > select a client > Profile > Payors > Insurance tab	The client's insurance plan.
Client Creation Date	Contacts > Clients > Added	The date the client was created in CentralReach.
Client Last Deactivated On	Contacts > Clients > Profile > History	The date the client was deactivated on.
Client Last Deactivated By	Contacts > Clients > Profile > History	The contact that deactivated the client.
Client Last Reactivated On	Contacts > Clients > Profile > History	The date the client was reactivated on.
Client Last Reactivated By	Contacts > Clients > Profile > History	The contact that reactivated the client.

Client Label

ABI Fields	UI Mapping	Description
Client Label Name	Contacts > Clients > Label	The label(s) associated with the client.

Provider

ABI Fields	UI Mapping	Description

Provider Full Name	Contacts > Employees & Co-Workers > Name	The provider's full name.
Provider Last Name	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Last Name	The provider's last name.
Provider First Name	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > First Name	The provider's first name.
Provider Middle Initial	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > MI	The provider's middle initial.
Provider Credentials	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Credentials	The provider's credentials, such as MBA, PhD, BCBA.
Provider Gender	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Gender	The provider's gender.
Provider Marital Status	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Marital Status	The provider's marital status.
Provider NPI Number	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > NPI Number	The provider's National Provider Identifier (NPI).
Provider Active Status	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Status	Describes if the provider is active or inactive.
Provider Birth Date	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > DOB fields	The provider's birth date.
Provider Employee Type	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Type	Explains the type of user, such as Employee, Client, Generic.
Provider Termination Date	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Termination Date	The date the provider was terminated.
Provider Company Name	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Company	The organization the provider works for.
Provider Email	Contacts > Employees &	The provider's email.

	Co-Workers > select a provider > Profile > Basics > E-mail	
Provider Mailing Address 1	Contacts > Employees & Co-Workers > select a provider > Profile > Address > Address	The first line of the provider's address.
Provider Mailing Address 2	Contacts > Employees & Co-Workers > select a provider > Profile > Address > Address #2	The second line of the provider's address.
Provider Mailing Postal Code	Contacts > Employees & Co-Workers > select a provider > Profile > Address > Zip/Postal Code	The provider's zip code.
Provider Mailing City	Contacts > Employees & Co-Workers > select a provider > Profile > Address > City	The city the provider resides in.
Provider Mailing County	Contacts > Employees & Co-Workers > select a provider > Profile > Address	The county the provider resides in.
Provider Mailing State Province	Contacts > Employees & Co-Workers > select a provider > Profile > Address > State	The state the office is in.
Provider Mailing Country	Contacts > Employees & Co-Workers > select a provider > Profile > Address > Outside of the US? > Country	The country the provider resides in.
Provider Office Address 1	Contacts > Employees & Co-Workers > select a provider > Profile > EXT. Profile > Office Locations > select a location > Address	The first line of the office address.
Provider Office Address 2	Contacts > Employees & Co-Workers > select a provider > Profile > EXT. Profile > Office Locations > select a location > Address 2	The second line of the office address.
Provider Office Postal Code	Contacts > Employees & Co-Workers > select a provider > Profile > EXT. Profile > Office Locations > select a location > Zip/Postal Code	The office's zip code.
Provider Office City	Contacts > Employees & Co-Workers > select a provider >	The city the office is in.

	Profile > EXT. Profile > Office Locations > select a location > City	
Provider Office County	Contacts > Employees & Co-Workers > select a provider > Profile > EXT. Profile > Office Locations > select a location	The county the office is in.
Provider Office State Province	Contacts > Employees & Co-Workers > select a provider > Profile > EXT. Profile > Office Locations > select a location > State	The state the office is in.
Provider Office Country	Contacts > Employees & Co-Workers > select a provider > Profile > EXT. Profile > Office Locations > select a location > Outside of the US? > Country	The country the office is in.
Provider Home Phone Number	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Home	The provider's home phone number.
Provider Cell Phone Number	Contacts > Employees & Co-Workers > select a provider > Profile > Basics > Cell	The provider's cell phone number.
Provider Office Location	Contacts > Employees & Co-Workers > select a provider > Profile > EXT. Profile > Office Locations	The provider's office location.
Provider Last Deactivated On	Contacts > Employees & Co-Workers > select a provider > Profile > History	The date the provider was deactivated on.
Provider Last Deactivated By	Contacts > Employees & Co-Workers > select a provider > Profile > History	The contact that deactivated the provider.
Provider Last Reactivated On	Contacts > Employees & Co-Workers > select a provider > Profile > History	The date the provider was reactivated on.
Provider Last Reactivated By	Contacts > Employees & Co-Workers > select a provider > Profile > History	The contact that reactivated the provider.

Provider Label

ABI Fields	UI Mapping	Description
Provider Label Name	Contacts > Employees & Co-Workers > Labels	The label(s) associated with the provider.

TaskLabel

ABI Fields	UI Mapping	Description
TaskLabelId	Tasks > Label	The task label's CR ID number.
TaskLabelName	Tasks > select label > label name	The name of the label(s) attached to the task.

Created By Employee Label

ABI Fields	UI Mapping	Description
Id		The employee's CR identifier.
Created By Employee Label Name	Contacts > Employees & Co-Workers > select an employee > Profile > Basics > First Name	The employee's first name.

Tasks- Not completed.
TaskAttribute- Not completed.
TaskToLabelBridge - Not completed.
Tasks_Template - Not completed.

EXT_Task

ABI Fields	UI Mapping	Description
TaskId	Tasks > Id	The task's CR ID number.
Task Name	Tasks > Task	The name of the task.

CreatedByEmployee - Not completed.
ClaimLine - Not completed.

AssignedToEmployee - Not completed.

Employee

This is referring to employees' payroll settings.

ABI Fields	UI Mapping	Description
Employee First Name	Contacts > Employees & Co-Workers > select an employee > Profile > Basics > First Name	The employee's first name.
Employee Last Name	Contacts > Employees & Co-Workers > select an employee > Profile > Basics > Last Name	The employee's last name.
Employee Full Name	Contacts > Employees & Co-Workers > select an employee > name located on facesheet	The employee's full name.
Employee Work Phone Number	Contacts > Employees & Co-Workers > select an employee > Profile > Basics > Address > Work	The employee's work phone number.
Employee Cell Phone Number	Contacts > Employees & Co-Workers > select an employee > Profile > Basics > Address > Cell	The employee's cell phone number.
Employee Payroll Company	Human Resources > Employees > Payroll company	The payroll company the employee is associated with.
Employee Workers Comp Number	Human Resources > Employees > Workers Comp #	The employee's workers compensation number.
Employment Type	Human Resources > Employees > Type	The type of employment, such as full time, part time, or temporary.
Employment Position	Human Resources > Employees > Position	The employee's position.
Employee Hire Date	Human Resources > Employees > Hire Date	The date the employee was hired.

Employee Department	Human Resources > Payroll > Actions > Standard Payroll Export > Department	The department the employee works in.
Employee Pay Code	Human Resources > Employees > Pay Codes	The employee's pay codes.
Employee Has Benefits	Human Resources > Employees > Pay Codes > Payroll Setup > Has Benefits	Describes if the employee has benefits.
Employee Payroll Reference	Contacts > Employees & Co-Workers > Payroll company	The employee's CR ID number.
Employee Active Status	Contacts > Employees & Co-Workers > select an employee > Profile > Basics > Status	Describes if the employee is active.

Employee Label

ABI Fields	UI Mapping	Description
Employee Label Name	Contacts > Employees & Co-Workers > select an employee > labels included on facesheet	The label(s) attached to the employee.

Payroll

ABI Fields	UI Mapping	Description
Payroll Attribute ID	N/A	N/A
Payroll Employee ID	Human Resources > Payroll > Actions > Standard Payroll Export > Payee ID	The employee's CR identifier.
Payroll Client ID	Human Resources > Payroll > Actions > Standard Payroll Export > Service - Client Id	The client's CR identifier.
Payroll Provider ID	Human Resources > Payroll > Actions > Standard Payroll Export > Service - Provider Id	The provider's CR identifier.
Payroll Start Date	Human Resources > Payroll > date drop-down > the first date	The pay period's start date.

Payroll End Date	Human Resources > Payroll > date drop-down > the second date	The pay period's end date.
Payroll Entry Date	Human Resources > Payroll > Run Date	The date payroll was run.
Payroll Service Date	Human Resources > Payroll > Actions > Standard Payroll Export > Date	The date of the appointment.
Payroll Service Start Time	Billing > Billing > Options > Edit Timesheet > Time Worked	The time the service started.
Payroll Service End Time	Billing > Billing > Options > Edit Timesheet > Time Worked	The time the service ended.
Payroll Service Code ID	Human Resources > Payroll > Actions > Standard Payroll Export > Service - Code	The service code's CR ID number.
Payroll Item ID	N/A	N/A
Payroll ID	N/A	N/A
Payroll Service Units	Human Resources > Payroll > Actions > Standard Payroll Export > Service - Units	
Payroll Service Rate	Human Resources > Payroll > Actions > Standard Payroll Export > Service - Hourly Rate	The rate an employee is paid for the service.
Payroll Blended Rate	Human Resources > Payroll > Actions > Standard Payroll Export > Overtime - Blended Rate (Total Hourly Pay / Hours Worked)	The total hourly pay divided by hours worked.
Payroll Paid Amount	Human Resources > Payroll > Actions > Standard Payroll Export > Paid	The amount the employee is paid.
Payroll Salary Per Period	Human Resources > Payroll > Actions > Standard Payroll Export > Salary columns	The employee's salary each pay period.
Payroll Salary Per Hour	Human Resources > Payroll > Actions > Standard Payroll Export > Salary - Hourly Rate This Period	The employee's salary per hour.

Payroll Salary Hours Worked	Human Resources > Payroll > Actions > Standard Payroll Export > Salary - Hours Worked This Period	The employee's salary for a certain amount of hours worked.
Payroll Salary Annual Amount	Human Resources > Payroll > Actions > Standard Payroll Export > Salary - Annual	The employee's annual salary.
Payroll Time Off Hours	Human Resources > Payroll > Actions > Standard Payroll Export > Time Off (Hours)	The amount of hours the employee took off in a pay period.
Payroll Drive Time	Human Resources > Payroll > Actions > Standard Payroll Export > Drive Time columns	The amount of hours the employee drove per pay period.
Payroll Rate Per Mile	Human Resources > Payroll > Actions > Standard Payroll Export > Drive Mileage - Rate per mile	The amount the employee is reimbursed per mile driven.
Payroll Drive Miles	Human Resources > Payroll > Actions > Standard Payroll Export > Drive Mileage - Miles Driven	The amount of miles the employee drove per pay period.
Payroll Overtime Multiplier	Human Resources > Payroll > Actions > Standard Payroll Export > Overtime - Multiplier	The hourly rate x the overtime multiplier determines the employee's overtime amount.
Payroll Overtime Rate	Human Resources > Payroll > Actions > Standard Payroll Export > Overtime - Rate Paid	The amount the employee is paid for working overtime.
Payroll Billing Entry ID	Billing > Billing > Options column > Preview Entry > Entry ID	The billing entry's CR ID number.

Payroll Attribute

ABI Fields	UI Mapping	Description
Payroll Pay Type	Human Resources > Payroll > Actions > Standard Payroll Export > Pay Types	Describes the type of pay for the employee, such as hourly or salary.
Payroll Paid As Overtime	Human Resources > Payroll > Actions > Standard Payroll Export > Overtime columns	Describes if the employee was paid overtime.

ServiceCode

ABI Fields	UI Mapping	Description
ServiceCodeProviderId	In the upper right-hand corner, select the organization's name > ID	The organization's CR identifier.
ServiceCode	Billing > Service Codes > select a service code > Code	Billable and non-billable codes to track hours worked, scheduled, and any remaining in an authorization.
ServiceCodeDescription	Billing > Service Codes > Description	The organization's service codes.
ServiceCodeBillableStatus	Billing > Service Codes > Code Type	Describes whether a service code is billable or non-billable.
ServiceCodeBillBy	Billing > Service Codes > Options > Edit Code Properties > Calculation Type	The service code is billed by time or units.
ServiceCodePayBy	Billing > Service Codes > Options > Edit Code Properties > Calculation Type	The service code is paid in time or units.
ServiceCodeEnforceLevel	Billing > Service Codes > select a service code > Enforce rate	The enforce rate set in the service code is to limit user access. The different levels consist of Default rate can be used, Enforce custom provider, Enforce custom client rate, and Enforce custom provider and client rate.
ServiceCodeMinutesPerUnit	Billing > Service Codes > select a service code > Minutes per Unit	The number of minutes in a unit.
ServicCodeModifier1	Billing > Service Codes > select a service code > Modifiers	The first modifier in the service code.
ServiceCodeModifier2	Billing > Service Codes > select a service code > Modifiers	The second modifier in the service code.
ServiceCodeModifier3	Billing > Service Codes > select a service code > Modifiers	The third modifier in the service code.
ServiceCodeModifier4	Billing > Service Codes > select	The fourth modifier in the

	a service code > Modifiers	service code.
ServiceCodeServiceAddressRequirement	Billing > Service Codes > select a code > Validation section > Service Address	Describes if the service address is optional or required.
ServiceCodeServiceLocationRequirement	Billing > Service Codes > select a code > Validation section > Service Location	Describes if the service location is optional or required.
ServiceCodeActiveStatus	Billing > Service Codes > Options > Edit Code Properties > Delete	Describes if the service code is active.

ServiceCodeLabel

ABI Fields	UI Mapping	Description
ServiceCodeLabelName	Billing > Service Codes > Labels	The name of the label associated with the service code.

SvcCodeToLabelBridge

ABI Fields	Description
ServiceCodeId	The service code's CR ID number.
ServiceCodeLabelID	The service code label's CR ID number.

Facility

ABI Fields	UI Mapping	Description
Facility Name	Scheduling > View my Calendar > select appointment > Full Details > Place of Service	The appointment location's Place of Service.

Payment

ABI Fields	UI Mapping	Description
Payment ID	Billing > Payments > export the Payments grid > Id	The CR ID number for the payment.
Payment Record Date	Billing > Payments > export the	The date the payment was made.

	Payments grid > RecordDate	
Payment Creation Date	Billing > Payments > export the Payments grid > CreationDate	The date of the payment made in CR.
Payment Department	Billing > Payments > export the Payments grid > Department	A group of payments from a single bank account.
Payment Payor Name	Billing > Payments > export the Payments grid > PayorName	The name of the insurance payor that paid for the service.
Payment Type Name	Billing > Payments > export the Payments grid > PaymentType	The type of payment, such as cash, check, or credit card.
Payment Reference	Billing > Payments > Reference	The reference number of a payment.
Payment Notes	Billing > Payments > + > Notes	The payment notes.
Payment Amount	Billing > Payments > export the Payments grid > Amount	The amount owed and paid for the service.
Payment Is Copay	Billing > Payments > export the Payments grid > IsCopay	Describes if the payment was for a copay.
Payment Applied By Contact ID	Billing > Payments > export the Payments grid > AppliedByContactId	The user's CR identifier that made the payment.
Payment Applied By Full Name	Billing > Payments > export the Payments grid > AppliedByFullName	The user that applied the payment's full name.
Payment Voided By	Billing > Payments > export the Payments grid > VoidedBy	The user that voided the payment.
Payment Voided Date	Billing > Payments > export the Payments grid > VoidedDate	The date the payment was voided.
Payment Voided Reason	Billing > Payments > export the Payments grid > VoidedReason	Describes why the payment was voided.
Payment Primary Location	Billing > Payments > export the Payments grid > PrimaryLocation	The primary location where the service was performed.
Payment Invoice ID	Billing > Payments > export the Payments grid > Invoice#	The invoice's CR ID number.
Payment First Billed	Billing > Payments > export the Payments grid > FirstBilled	Describes when the payment was first billed.
Payment Procedure Code String	Billing > Payments > export the	The CPT/HCPCS code.

	Payments grid > ProcedureCodeString	
Payment Claim Adjustments	Billing > Payments > export the Payments grid > ClaimAdjustments	The settling or denying of a claim.
Payment Payor Nickname	Billing > Payments > export the Payments grid > PayorNickname	The name of the payor in CR.
Payment Batch ID	Billing > Payments > export the Payments grid > Id	The CR ID number for the group of payments.
Payment Batch Deposit Date	Billing > Payments > Batches > Transactions > Deposit Date	The date the group of payments was made.
Payment Batch Name	Billing > Payments > Batches > Name	The name for the group of payments.
Payment Batch Creation Date	Billing > Payments > + > Created	The date the group of payments was created.
Payment Batch Start Date	Billing > Payments > Batches > Start Date	The start date when the batch of payments were made.
Payment Batch End Date	Billing > Payments > Batches > End Date	The date the batch of payments were processed.
Payment Account Name	Billing > Payments > Batches > Account	The name of the account the payment came from.
Payments AR Age	Billing > Receivables Report	Contains aging by payor.
Payments AR Buckets	Billing > Receivables Report	Contains aging by payor for 365+ days.

Payment Summary

ABI Fields	UI Mapping	Description
Insurance Agreed Charges	Billing > RCM Report > payor > Charges > Insurance	The total charges negotiated with the insurance carrier.
Patient Agreed Charges	Billing > RCM Report > client > Charges > Patient	The service rate negotiated with the client.
Insurance Payments	Billing > RCM Report > payor > Payments > Insurance	The payments received from the insurance payor for services provided.
Patient Payments	Billing > RCM Report > payor >	The payments clients have made

	Payments > Patient	for services provided.
Insurance Sales Adjustments	Billing > RCM Report > payor > Sales Adjustments > Insurance	A payment posted as a sales adjustment toward insurance charges.
Patient Sales Adjustments	Billing > RCM Report > client > Sales Adjustments > Patient	A payment posted as a sales adjustment toward insurance charges.
Insurance Bad Debt	Billing > RCM Report > payor > Bad Debt > Insurance	The uncollectible amount owed for services provided.
Insurance Receivables	Billing > Receivables Report > sort by payor	The amount owed from insurance payors.
Patient Receivables	Billing > Receivables Report > sort by client	The amount owed from clients.
Insurance Over Payments	Billing > Receivables Report > over payments	The amount the insurance payor has overpaid for services provided.
Patient Over Payments	Billing > Receivables Report > sort by client > over payments	The amount the client has overpaid for services provided.

Payor Authorization

ABI Fields	UI Mapping	Description
Auth Start Date	Billing > Authorizations > Valid from	The authorization's start date.
Auth End Date	Billing > Authorizations > Until	The authorization's end date.
Auth Entry Date	Billing > Authorizations > select an authorization > File Details > Created	The date the authorization was entered in CR.
Auth Number	Billing > Authorizations > select an authorization > General tab > Authorization #	The authorization number.
Auth Frequency	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Frequency & Amounts	The amount of services a client can have.
Auth Hours	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Hours	The amount of hours each appointment should be scheduled for.

Auth Amount	Billing > Authorizations > select an authorization > Frequency & Amounts tab > $ Amount	The total amount approved for services.
Auth Units	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Units	The total number of units approved.
Auth Visits	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Visits	The total number of visits approved.
Auth Group ID	Billing > Authorizations > select an authorization > Service Code Breakdown section	The authorization group's CR ID number.
Auth Group Start Date	Billing > Authorizations > select an authorization > Service Code Breakdown section > Date	The date the authorization is approved to start.
Auth Group End Date	Billing > Authorizations > select an authorization > Service Code Breakdown section > Date	The date the authorization is approved until.
Auth Group Deleted On	Billing > Authorizations > select an authorization > Delete (in the pop-up)	The date the authorization was deleted.
Auth Group Total Units	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Total Units	The total amount of units approved in the authorization.
Auth Group Total Hours	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Total Hours	The total amount of hours approved for services.
Auth Group Total Visits	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Total Visits	The total number of visits approved for services.
Auth Group Total Amount	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Total $ Amount	The total amount approved for services.
Auth Deleted Date	Billing > Authorizations > select an authorization > Delete (in the pop-up)	The date when the authorization was deleted.
Allow Over Bill Amount	Billing > Authorizations > select an authorization > Frequency & Amounts tab > $ Amount > Allow Overbilling	Allows users to continue submitting a timesheet after a message displays warning users that the authorized amounts have been exceeded.

Allow Over Bill Amount Total	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Total $ Amount > Allow Overbilling	Allows users to continue submitting a timesheet after a message displays warning users that the authorized amounts have been exceeded.
Allow Over Bill Hours	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Hours > Allow Overbilling	The amount of hours allowed to over bill for services.
Allow Over Bill Hours Total	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Total Hours > Allow Overbilling	Total amount allowed to over bill for services.
Allow Over Bill Units	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Units > Allow Overbilling	The amount of units allowed to over bill for services.
Allow Over Bill Units Total	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Total Units > Allow Overbilling	Total amount of units allowed to over bill for services.
Allow Over Bill Visits	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Visits > Allow Overbilling	The amount of visits allowed to over bill for services.
Allow Over Bill Visits Total	Billing > Authorizations > select an authorization > Frequency & Amounts tab > Total Visits > Allow Overbilling	The total amount of visits allowed to over bill for services.

Payor Plan

ABI Fields	UI Mapping	Description
Payor Plan Name	Billing > Payor	The insurance plan’s name.
Payor Name	Billing > Payor	The name of the insurance.