



# Get to Know OrthoFi's New Data Extract API for OSOs & DSOs

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OrthoFi's new Data Extract API allows OSO & DSO clients to easily pull information from our database to recreate essential reporting without manually pulling spreadsheets out of OrthoFi.

Our data endpoints are refreshed nightly and can be used to recreate all of the following reports within the OrthoFi Application:

- Starts
- Kept New Patient Exams (NPE)
- Conversions
- Outcomes
- Referrals
- Production Adjustments
- Discounts
- Miscellaneous Charges
- Interest Accrual Details
- Collections Details
- Insurance Accounts Receivables
- Patient Accounts Receivables
- Charges - Service Fees, Interest, Late Fees

## Additional Reporting Endpoints

- Practice Scorecard Summary - This is similar to the "Business Health Dashboard" in OrthoFi. Includes aggregate Key Performance Indicators (KPIs) by location by month.
- Practice Scorecard Benchmarks - We've created aggregate level reporting by state for specific KPIs that a practice can use to see how their own practices are performing against OrthoFi averages.

## Technical:

This is a standard REST API that delivers responses in JSON format and our production environment is refreshed nightly. We currently use a [client credentials authentication flow](#).

You will be given a **client\_id** and **client\_secret** to get an **access\_token** to request data.

To get an **access\_token**, please hit our [auth\\_endpoint](#) with an **x-www-form-urlencoded HTTP POST** method with your **client\_id** and **client\_secret** and **grant\_type: client\_credentials**.

## Swagger Description:

To see information about the endpoints you have access to, we have released an [open API document](#) that gives you the endpoints as well as the type definitions.

That endpoint response is an open API specification that can be copied and pasted into the left side of <https://editor.swagger.io/>

Here you will find a list of all of our endpoints. If you click on an endpoint, you will see how to match it to our UI reporting and definitions of the columns. Using these parameters and filters, you can match up the data to the OrthoFi reports in the application.

**GET** /v1/practice-locations/insurance-accounts-receivable Retrieves insurance accounts receivable for practice locations

To match the insurance accounts receivable report match the practice locations in the report to the practice locations in the API and the date range of the report (Month in Report is the LAST day of the month) to the "as-of-date" query parameter in the API AND FILTER WHERE "outstandingBalance" >= 0 AND "submissionStatus" NOT IN ('Complete', 'No Benefits', 'Unverified', 'Unverified - Future Appliance', 'Ignore').

**Parameters** Try it out

Name	Description
practice-location-ids	Comma separated list of practice location ids
string (query)	<input type="text" value="practice-location-ids"/>
as-of-date	As of Date
string(\$date-time) (query)	<input type="text" value="as-of-date"/>
contract-ids	Comma separated list of contract ids
string (query)	<input type="text" value="contract-ids"/>
submission-status	Submission Status of account
string (query)	<input type="text" value="submission-status"/>
outstanding-balance	Comparison operator (>, >=, =, !=, <=, <) followed by colon (:) and amount of outstanding balance [>:0]
string (query)	<input type="text" value="outstanding-balance"/>

## Communication & Releases:

We will be sending any updates to the API from the email [orthofi.api@orthofi.com](mailto:orthofi.api@orthofi.com). Please whitelist this email address and keep an eye out for any communications.

## Next Steps:

Email [orthofi.api@orthofi.com](mailto:orthofi.api@orthofi.com) to get your `client_secret` and `client_id` to get started!

We are happy to walk through any questions you may have. Please reach out with any feedback or questions.

## FAQs:

### What is the size limit of the API calls?

- The current limit for a single response for the normal endpoints is 4.5MB. If requesting bulk data or larger datasets please use the `/v1/history` endpoints. They will return a pre-signed url to the data in json format and there are no limits.

### How do I match up endpoints to the reports in OrthoFi?

- We have created descriptions in the swagger document for each endpoint that will tell you exactly what fields to use in order to match up to the reports in OrthoFi. Our endpoints give the users much more information than our application reporting, so we have built in instructions of what filters to use to reconcile.

### How do I get month-end snapshots?

- Our API is a nightly refresh of our transactional database. This means that things can change historically. If you are needing to see a true snapshot of a specific time period, you will need to make sure that you have a job set up to pull the data into your own data warehouse each night. Then you can look historically to see what it was at that time, versus what has changed if you pull that endpoint for a specific month.

### How do I get all the historical data?

- We have built out historical endpoints that will send over an all time dump of the historical data for that endpoint. This was built to be used as a one time or occasional pull to get the database started.

### What does the “-1” PatientIds mean in the `/Collections-Detail` endpoint?

- These are non-OrthoFi Patients

### Does the access to the API cost an additional fee?

- No, we are providing our customers data free of charge.

### Timing of Nightly refresh?

- Data available for previous day by 4:00am EST



**CUSTOMER SUPPORT**  
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