

## Client Implementation Overview

A stage-gate process that allows clients/developers to build API integrations at their own pace in a self-service model. athenahealth will continue to provide technical solution consulting to developers as they advance through the self-service stages.

### Stage Gate Process



#### Ready - Solution Design

##### Overview

- athena PM/CSM submits Salesforce IR
- Integration Design consultant meets with client to review integration goals and confirm general viability
- Draft of the API Technical Specification is created

##### Deliverables/Resources

- Developer Portal Username
- Drafted Client API Technical Specification
- API Proposal
- Preview Access is Granted
- API-ops technical request form

#### Set - Self Service

##### Overview

- Developer reviews specs and develops code on their own time
- API questions submitted via technical request form
- Developer indicates readiness by submitting technical request form

##### Deliverables/Resources

- Developer Portal Documentation
- API-ops technical request form

#### Go Live - Validation

##### Overview

- 1 Hour readiness and status call
- Full end to end demonstration
- Production Key Generation/GoLive
- 2 weeks post go-live support

##### Deliverables/Resources

- Finalized API Technical Specification
- Go-Live Authorization Form

## Step 1) Explore the dev portal

### Description:

Are you interested in leveraging the athenahealth APIs for an integration solution? Please review our documentation at <https://www.athenahealth.com/developer-portal/api> and create your dev portal account. Check out the [Quickstart](#) section in I/O Docs to get a feel for things. We do have some sample code to get you started. In short, our API is RESTful and uses JSON.

If you decide to move forward with building an integration, please initiate a project request through your athenahealth primary contact (CSM or PM) to create an API project in our queue.

### Deliverables:

- Create your dev portal account
- Request a project

### General tips:

- Get to know your CSM or PS-PM
- If you're unsure who to contact you can always call our Client Service Center (CSC)
- Confirm your project is on file (you should have an Integration Request number or case number)

Athena Responsibilities	Client/Partner Responsibilities
<ul style="list-style-type: none"> <li>- CSM/RM submits an Integration Request</li> <li>- When available, an athenahealth API consultant will reach out to initiate the Solution Design Stage.</li> </ul>	<ul style="list-style-type: none"> <li>- Create a developer portal account</li> <li>- Familiarize yourself with the developer portal</li> <li>- Request a project task</li> </ul>

## Solution Design Stage

### Description:

During this stage, the client, partner, and athenahealth Integration Design Consultant will work together to review client's integration goals, confirm technical viability, and agree on an overall timeline. The vendor and athenahealth API consultant will work to develop an **API Technical Specification**. This document defines the scope of the integration by outlining the Use Cases and API Endpoints. Administrative requirements are also reviewed with the project team during this time, which includes the **API Proposal**.

### Deliverables:

- Sign and return the **API Proposal**
- Supporting diagrams (optional)
- **API Technical Specification**

### Duration:

- Generally ~30 days

### General tips:

- Feel free to share questions prior to attending conference calls
- Review documentation in the athenahealth developer portal
- Please note that the **API Proposal** and **API Technical Specification** are required in order to advance to the next stage (development and testing)

Athena Responsibilities	Client/Partner Responsibilities
<ul style="list-style-type: none"> <li>- Initiate Solution Design kick-off</li> <li>- Review integration goals, confirm technical viability, and agree on overall timeline</li> <li>- Work with partner to develop <b>API Technical Specification</b></li> <li>- Generate Preview Environment for testing</li> <li>- athena presents <b>API Proposal</b> to sign</li> <li>- Upon receipt, athena grants <b>back-end access</b> to the client's Preview tablespace only</li> </ul>	<ul style="list-style-type: none"> <li>- Explicitly outline business requirements and integration goals</li> <li>- Client &amp; Vendor be present on calls</li> <li>- Vendor simultaneously work with athenahealth to develop an <b>API Technical Specification</b></li> <li>- Vendor test API endpoints in sandbox environment (PREV 195900)</li> <li>- Client returns signed <b>API Proposal</b></li> <li>- Partner begins coding and testing in client's Preview tablespace</li> </ul>

## Development & Testing Stage

### Description:

You are now ready to begin coding. As a general reminder clients and/or partners own the engineering effort and are responsible for all development and testing. Initial questions should be researched on the developer portal first. If you get stuck and need assistance from athena you may submit an API Technical Request, [https://developer.athenahealth.com/docs/read/reference/athena\\_net/Client\\_Integration\\_Technical\\_Request\\_Form](https://developer.athenahealth.com/docs/read/reference/athena_net/Client_Integration_Technical_Request_Form).

With the request form you can:

- Request a preview environment
- Request a refresh of the preview environment
- Ask for developer access to a preview environment
- Request Solution Validation
- Ask general questions about Calls / Responses you are seeing with the API

When you are ready to deploy to production please submit a request for solution validation.

### Deliverables:

- Development and testing
- Submit request for solution validation

### Duration:

- One of the benefits of API self-service is you can code at your own desired pace.
- However, after 180 days athenahealth recommends going back to Solution Design Stage for a second consultation. A lot can change in six months (new functionality, new project timelines) and this is a great opportunity to pause and re-assess business requirements.

Athena Responsibilities	Client/Partner Responsibilities
<ul style="list-style-type: none"> <li>- Provide responses to questions submitted via the API technical request form</li> </ul>	<ul style="list-style-type: none"> <li>- Code leveraging athenahealth APIs</li> <li>- Vendor performs Unit Testing in Preview</li> <li>- Client &amp; Vendor perform End Unit Testing in Preview</li> <li>- When ready to enter solution validation wave, submit an SV request</li> </ul>

## Solution Validation and Go-Live Stage:

### Description:

Production access to APIs may only be granted by an API Solution Consultant following a successful Solution Validation call, and receipt of the signed **Go-Live Authorization** form.

The athenahealth Integration Design consultant will contact you to schedule a 1 hour technical readiness and status call. Please ensure the appropriate technical resources are in attendance for the meeting. Following this, the consultant will schedule a solution validation call. Please be prepared to demonstrate a full working integration, and be prepared for any questions concerning the integration.

Following validation, your athenahealth API consultant will generate a production key and remain involved for 10 business days for any post go-live support questions. After the 10 days all questions and support issues must be routed through the athenahealth Client Service Center (CSC).

### Deliverables:

- Fully developed integration
- Solution Validation call
- Most up to date version of **API Technical Specification**
- **Go-Live Authorization**

### Duration:

- It is important for clients/partners to test the integration thoroughly prior to requesting and entering the validation stage.
- The athenahealth API consultant is available to you for a **maximum** of six weeks.

athena Responsibilities	Client/Vendor Responsibilities
<ul style="list-style-type: none"> <li>- athenahealth API consultant dedicates up to 10 hours to the following:                             <ul style="list-style-type: none"> <li>- Initiate initial reach out &amp; schedule meetings. Meeting consist of:                                     <ul style="list-style-type: none"> <li>- Kick-Off Call</li> <li>- End-to-end testing call</li> <li>- Solution Validation</li> </ul> </li> <li>- Generate Production Key &amp; add tablespace permission(s)</li> <li>- 10 business days Post Go-Live Support</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>- Present the most up to date <b>API Technical Specification</b></li> <li>- Have a demo ready addressing use case(s)</li> <li>- Client sign <b>Go-Live Authorization</b> (after approved Solution Validation)</li> <li>- Vendor moves code to production after production key generation</li> </ul>

## FAQs

### What happens if I am not able to validate in the six week time period?

If you are unable to pass validation, you are able to return to the self-coding stage to adjust your solution. When you are ready to validate the solution again, please leverage the Technical Request Form: [https://developer.athenahealth.com/docs/reference/athena\\_net/Client\\_Integration\\_Technical\\_Request\\_Form](https://developer.athenahealth.com/docs/reference/athena_net/Client_Integration_Technical_Request_Form)

### Why does athena need to validate my solution?

athenahealth requires a validation call to ensure the end-state solution functions as intended, is in accordance with athenaNet workflows, and complies with all industry regulations.

### Where can I download project documents like the technical spec and API Proposal?

API Technical Specification

[https://developer.athenahealth.com/files/API\\_Technical\\_Specification.docx](https://developer.athenahealth.com/files/API_Technical_Specification.docx)

API Proposal

[https://developer.athenahealth.com/files/API\\_Proposal.docx](https://developer.athenahealth.com/files/API_Proposal.docx)

Go-Live Authorization

[https://developer.athenahealth.com/files/API\\_Go\\_Live\\_Authorization.docx](https://developer.athenahealth.com/files/API_Go_Live_Authorization.docx)

Prep for validation call

[https://developer.athenahealth.com/files/CI\\_API\\_Validation.pdf](https://developer.athenahealth.com/files/CI_API_Validation.pdf)

### How do I request new features and functionality?

All requests are routed through athena's Customer Intelligence team. Please submit your request here: <https://success.athenahealth.com/s/ideas>