![SunshineSpend - GLOBAL TRANSPARENCY AND AGGREGATE SPEND REPORTING]
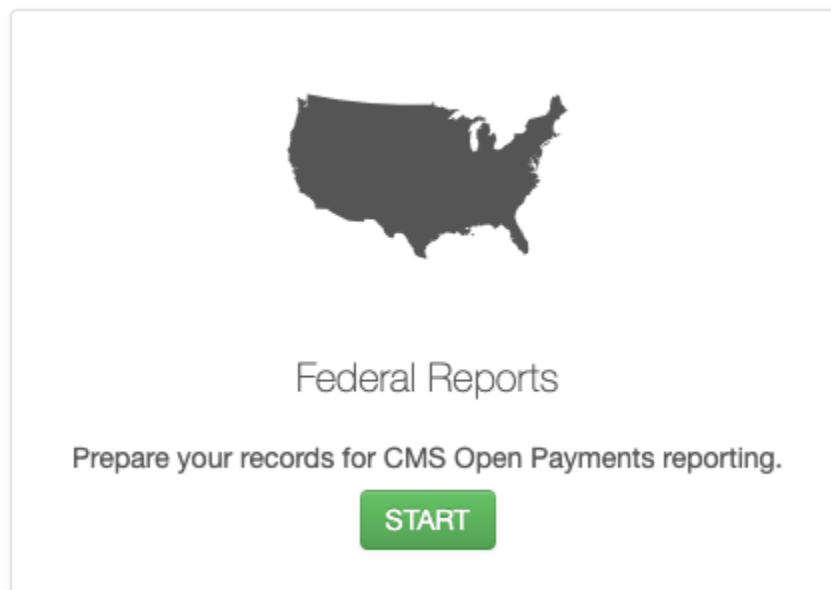
Quick Start Guide - Report Generation

From the menu bar: **Reporting** / Generate Reports

This document is organized into the following sections:

GENERATING FEDERAL REPORTS FOR CMS OPEN PAYMENTS

GENERATING FEDERAL REPORTS FOR CMS OPEN PAYMENTS

Click 'Start' under 'Federal Reports'

Federal Reports

Prepare your records for CMS Open Payments reporting.

START

Before you get started…

Federal Report

Before you get started, here's what you need to know:

- You should have completed an **Error Check** and fixed all system-identified errors
- SunshineSpend will automatically determine whether or not this is a **Consolidated Report** submission
- Your report output will be **CMS Upload and Archive** files — upload for submission to CMS and archive for your records
- When finished, you can select the **CMS Open Payment Login/Upload** link to submit your report

In order to generate your CMS Upload and Archive files, you'll want to have the following information ready:

- The **Payment Category** for this submission (General Payments, Research Payments, or Ownership or Investment Interest)
- The **Program Year** being submitted, and
- Whether the **Resubmission File Indicator** is New Submission, Resubmission, Renew Delay in Publication, or Delete.

Get Started »

Assuming all criteria are met, click 'Get Started' -- otherwise, return to **Data Management** / Workbench and perform any outstanding tasks.

Next, you will be prompted to choose 1 of 3 CMS Open Payment types. CMS reporting requires your organization to submit a single report for each Payment Category.

Federal Report

Select the **Payment Category** for this submission, then click **Continue**:

✓ General Payments
Research Payments
Ownership or Investment Interest

Continue »

Next, select the Program Year. During the CMS Open Payment reporting submission window, this will be for the prior year's payments.

Federal Report

Choose the **Program Year** for this General Payments submission, then Click **Continue**:

(Current Year option is displayed after April 1)

```
2021                    ⌄
```

« Go Back   **Continue »**

Indicate the submission type - in most circumstances, you will want to specify 'New Submission'

Federal Report

Choose the **Resubmission File Indicator** for this General Payments submission, then click **Continue**:

✓ New Submission
Resubmission
Renew Delay in Publication
Delete
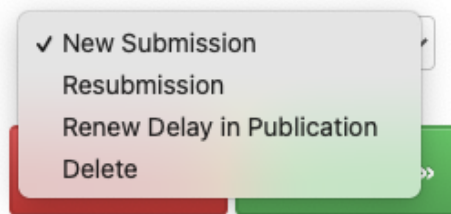
Last step - download your report. You are given 2 options:
- Generate a CMS UPLOAD VERSION
- Generate an ARCHIVE VERSION

Both generate a Comma Separate Value (.csv) type file - although the CMS Upload Version actually uses vertical bars, '|' as column delimiters.

*** What's VERY IMPORTANT with the CMS UPLOAD VERSION is you not open it with an application like Excel. Excel will not understand the vertical bar delimiter and even if it does, it will modify and reformat column data. CMS expects a very specific document format and column data format. Simply upload the file to CMS using the link specified. If you want to open a file, open the ARCHIVE VERSION - as it's much more human and Excel friendly. ***

Federal Report

Download your **General Payments New Submission** report for **PY 2021**:

○ CMS Upload Version (DON'T OPEN, JUST UPLOAD)

○ CMS Archive Version (YOUR COPY)

« Go Back   Download »

CMS Open Payments Login/Upload ☒

Click the 'Download' button.