



Quick Start Guide - Payment Remediation

From the menu bar: **Data Management** / Workbench / Remediate (or View)

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MODIFICATION TRACKING

Start the remediation process by logging into a SunshineSpend account that has Remediate (and/or View) functionality enabled (see **Setup**/User Maintenance) and click **Data Management** / Workbench / Remediate from the menu bar.

Locate the Reporting Year payments you wish to remediate (or view) -- recalling that the **Reporting Year** may be the prior year depending on the date. You may also select the '+' icon next to the **Reporting Year** to Remediate/View a subset of payments organized by an individual upload or Manual entries.

OVERALL GOAL OF THE REMEDIATION PROCESS

The overall goal of SunshineSpend's Remediation process is to get all of your organization's

Reportable payments a **Status** indicating the green "thumbs up" icon: 👍 There exist lots of information lookup tools (physician, practitioner, teaching hospital, license), record filtering capability, individual and mass editing functionality, and, perhaps most importantly - rules that will automatically guide you through the remediation process. Once the individual payments records have reached the 👍 **Status**, your likelihood of uploading the associated reports to CMS and achieving a successful outcome - are very high.

PAYMENT RECORD STATUS INDICATORS

View / Remediate (CMS 2021)

Entry Required

Entry Not OK

Entry Value Error

Entry Not Required

Show/Hide Row Filters

Select All (Current Rows)

Deselect All

Lookup Physicians, Practitioners, Hospitals & Licenses

Edit Column(s)

Add Row

Search:

	Status	Reportable	Payment Source	Payment Type	Recipient Type	Non-covered Entity Name	Teaching Hospital Name	Teaching Hospital Tax ID	Recipient First Name	Recipient Middle Name	Recipient Last Name	Recipient Suffix	Re Ac
<input type="checkbox"/>				Yes	Manual	Research	Covered Recipient Practitioner		MARIZA		MUSHEZA		10
<input type="checkbox"/>				Yes	Manual	Research	Covered Recipient Physician		DANIEL	J	FRANCO		64
<input type="checkbox"/>				Yes	Manual	General	Practitioner		JOLANTA	L	BAGINSKI		40
<input type="checkbox"/>				Yes	Manual	General	Physician		DANIEL	J	FRANCO		64
<input type="checkbox"/>				Yes	Manual	General	Practitioner		MARIZA		MUSHEZA		10
<input type="checkbox"/>				Yes	Manual	General	Practitioner		MARIZA		MUSHEZA		10
<input type="checkbox"/>				Yes	Manual	General	Practitioner		MARIZA		MUSHEZA		10
<input type="checkbox"/>				Yes	Manual	General	Practitioner		DEBORAH	L	WEBER		57
<input type="checkbox"/>				Yes	Manual	General	Practitioner		JOLANTA	L	BAGINSKI		40
<input type="checkbox"/>				Yes	noname	General	Physician		LISA	G	ABBOTT		66
<input type="checkbox"/>				Yes	noname	General	Physician		LISA	G	ABBOTT		66
<input type="checkbox"/>				Yes	noname	General	Physician		LISA	G	ABBOTT		66
<input type="checkbox"/>				Yes	noname	General	Physician		HANY	F	ABDEL		50
<input type="checkbox"/>				Yes	noname	General	Physician		MICHAEL	A	ABDUL-MALEK		23
<input type="checkbox"/>				Yes	noname	General	Physician		ZINOVIY		ABELEV		37

First

Previous

1

Next

Last

SunshineSpend allows you to track the various CMS Open Payments Payment Types (General, Research, Ownership) and your organization's payments from various sources (Concur, ERP, Excel, Manual, etc.) all in one place.

Each **Reportable** payment record will have one or more of the following **Status** indicators:

- Entry Required
- Entry Not OK
- Entry Value Error
- No Errors

As stated above, the goal of the remediation process is to have all your **Reportable** payments to have the green “thumbs up” icon as their **Status**.

Payment record cells will have borders color coded to the above entry error icons. That is, if an entry is required, the cell will have a purple border. If an entry should not have a value, its border will be red. If an entry has a value error - format, out of valid range, etc., its border will be orange. If an entry is not required for the Payment Type or based on another cell’s current value/selection - it will show as grayed out. Finally, if a cell has none of the above, a value is not required but providing a value may or may not change the record’s status.

CMS Open Payment rules are dynamically applied as a cell record’s values change. This allows you to use SunshineSpend as a “learning tool”.

ROLLOVER HELP TEXT

Most cells have rollover help text. If you place and keep mouse over and still for a few seconds any associated help text will appear. For example:

	Non-covered Entity Name	Teaching Hospital Name	Teaching Hospital Tax ID	Recipient First Name
Donor				
Physician				
				MARIZA
				MARIZA

Research Payments - Physician First Name - A required field when recipient type is Covered Recipient Physician, that is validated against either the current Verified Physician's List or NPPES NPI Registry. This field must be blank for any other recipient type. Text up to 20 characters is allowed.

EDITING INDIVIDUAL CELLS

Click on a cell to manually change its value. A popup will appear that will allow you to enter/modify text or select an option from a drop down list.

MASS EDITING OF CELLS

Select (check) rows you wish to edit - and click 'Edit Columns' or 'Lookup Physicians, Practitioners, Hospitals and Licenses'. All rows that are selected will have the changes applied. This is a powerful way to populate or change many or all payment records at the same time. Selected rows will be highlighted.

Edit Column Value(s)

Select one or more Columns for Editing, provide the new values (blank values are OK) and click Save Changes.

✓ -- Select Column --

Reportable

Payment Type

Non-covered Entity Name

Teaching Hospital Name

Teaching Hospital Tax ID

Recipient First Name

Recipient Middle Name

Recipient Last Name

Recipient Suffix

Recipient Business Address 1

Recipient Business Address 2

Recipient City

Recipient State

Recipient Zip Code (US only)

Recipient Country

Recipient Province

Columns to be Edited:

Payment Source

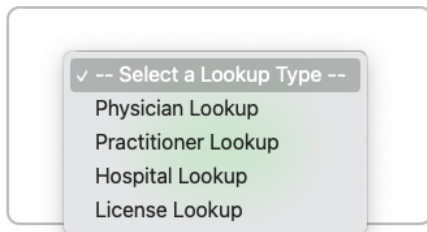
Recipient Type

Save Changes »

(1 record will be updated)

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CANCEL



Lookup Physicians, Practitioners, Hospitals & Licenses

Lookup Physicians, Practitioners, Hospitals & Licenses enables a simplified approach to locating and automatically populating missing Physician, Practitioner, Teaching Hospital and License data in your payment record(s).


By using the search or row filter options (if desired) on the main View/Remediate screen, and then choosing 'Select All Showing', lookup results may be applied to all, or some records.

When you've determined the records to revise, choose a lookup type on this page and select 'Continue'. For each lookup type, SunshineSpend will provide a description of the steps needed to process a change, and (if applicable) what to expect once the update is made.


Use these as a guide to each lookup type:

- Physician Lookup - use when physician-specific data (i.e. one physician at a time) needs validation against CMS-approved data sources (either for manual entries or, if not validated on import).
- Practitioner Lookup - use when practitioner-specific data (i.e. one practitioner at a time) needs validation against CMS-approved data sources (either for manual or, if not validated on import).

VIEW ORIGINAL RECORD DATA

Click on the  to see original values (e.g. from the upload). This feature can be useful as a back reference to all the payment data that was originally uploaded.

AUTOMATED POPULATION OF RECORD DATA

Values that were auto-populated by the SunshineSpend system (changes, correction, additions) made to the payment data and their associated Confidence Level can be viewed by clicking the  icon associated with the payment record.

RECORD FILTERING OPTIONS

Apply Row Filters - this is a way to reduce the number of records shown. For example, if you're logging in to fix any General Payment entry errors, you can select Payment Type

General and Row Status ‘with Any Errors’.

Row Filters: (filters are cleared when you perform a page reload)

Show Non-Reportable: ☒ Show Payment Types: General: ☒ Research: ☒ Ownership: ☒

Show Row Status:

All Rows: ☒ (with No Errors): ☐ (that include Entry Required Errors): ☐ (that include Entry Not OK Errors): ☐ (that include Entry Value Errors): ☐ with Any Errors: ☐

Show Payment Source:

Show Payment Input By:

Display rows where of the following conditions are met:

Search - another way to filter rows by content. To unapply this filter, simply delete any text in the Search input field. Hitting ‘Enter’ applies any Search filter changes

Search:

ADD ROW

Click ‘Add Row’ will create a Manual type, blank entry. Once you specify a value for Payment Type - associated data entry rules will automatically be applied. One efficient way of entering a new record would be to:

- Click ‘Add Row’
- Select the ‘Payment Type’
- Click the checkbox to the left of that row
- Click ‘Lookup Physicians, Practitioners, Hospitals & Licenses’
- Use the associate “lookup wizard” to local the physician, practitioner or teaching hospital
- Confirm and Save the changes.

MODIFICATION TRACKING

Each payment record has two timestamps - Input Time and Last Update Time. The user account that inputted the record is also shown (Payment Input By). These columns are included as part of the Record Filtering Options (Row Filters and Search).