



## Quick Start Guide - Payment Input Options

From the menu bar: **Data Management**

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This document is organized into the following sections:

EZADD

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ADD ROW

DELETING PAYMENTS

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## EZADD

### **Data Management** / ezAdd

SunshineSpend's ezAdd feature is primarily a way for your sales reps to regularly login and record Physician or Practitioner payment information. It is recommended to set up unique user logins (**Setup** / User Maintenance) with only the 'ezAdd' permission enabled for each of your sales reps.

To record a payment, sales reps login and choose **Data Management** / ezAdd.

## ezAdd

Use **ezAdd** to record a **single payment** that satisfies the following criteria:

- Payment was made to a Physician/HCP, Physician's assistant, Nurse practitioner, Clinical nurse specialist, Certified registered nurse or Certified nurse-midwife and
- Payment was not made to a third-party entity (e.g. physician's group practice) or an individual at the request of or on behalf of the Recipient.

Payments recorded during this session:

Payment Date	Recipient	Payment Amount	Form of Payment	Payment Category
No payments have been submitted (during this login session).				

Add a Payment »

Click 'Add a Payment'.

Next, look up the Recipient (Physician, Practitioner) by providing a subset of the input parameters:

### Step 1 of 2 - Recipient Lookup

#### FOR BEST SEARCH RESULTS:

- A partial entry is better than a full (but inaccurate) entry (Ex: enter "Albu" if you're not certain of the correct spelling of "Albuquerque")
- Enter **ONLY** the info which you know with certainty (Ex: enter "Mat" if you're not certain that it's "Mathew" or "Matthew")

**NPI** - Try first searching with only the NPI if you have it - otherwise, enter the first few numbers you know with certainty (if you have them)

National Provider Identifier (NPI)

**LAST NAME** - Enter the last name, OR, the first few characters (which you know with certainty)

Recipient's Last Name

**FIRST NAME** - Enter the first name, OR, the first initial, OR, the first few characters (which you know with certainty)

Recipient's First Name - NOTE: first names may not be the same as registered names.

**CITY** - Enter the city, OR, the first few characters (which you know with certainty):

Recipient's City

**STATE** - Select the State (if you know with certainty):

Recipient's State

No match? Try using fewer characters and/or less fields - OR - the recipient is not registered.

« Cancel

Clear Values

Search »

## Step 1 of 2 - Recipient Lookup

Located the recipient record you're searching for? **Select** it then click **Review & Confirm**; otherwise, click **Modify Search**. ☐ Yellow = Search Term Match

Search:

	NPI	Create Date	Last Updated	First Name	Last Name	Other First Name	Other Last Name	Provider Credential Text	Gender	I
<input type="radio"/>	1346289469	06/05/2006	05/19/2010	DANIEL	FRANCO			MD	M	

Show  records

First Previous **1** Next Last

Showing 1 to 1 of 1 records

« Cancel

« Modify Search

Enter Payment Information »

Select the recipient by clicking the radio button on the left side of the matching record, then click 'Enter Payment Information'.

## Step 2 of 2 - Enter Payment Information

**Recipient:** DANIEL FRANCO, MD

**Recipient Primary Type:**

**Payment Date:**  ⓘ

**Payment Amount:**  ⓘ

**Form of Payment:**  ⓘ

**Payment Category:**  ⓘ

« Cancel

« Modify Selection

Submit Payment Information »

Specify the details of the Payment - Date, Payment Amount, Payment Category and click 'Submit Payment Information'. Rollover help text is available by putting your mouse over the 'i' icon to the right of each field.

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# IMPORT A FILE

## Data Management / Upload / File to Import

SunshineSpend's 'File to Import' (bulk payment import) feature is primarily a way for your users to login and upload/record Physician or Practitioner payment information from a period of time - monthly, quarterly, bi-annually, yearly. It is recommended to set up unique user logins (**Setup** / User Maintenance) with the 'Upload / HCP Scrub & Import Payment Records' permission enabled for users that will be importing this type of payment information.

Choose **Data Management** / Upload / File to Import from the menu a drag & drop an Excel file containing your payment data. Upon successful upload, you will be asked to select the Excel Worksheet tab that contains the payment information.

### Import File

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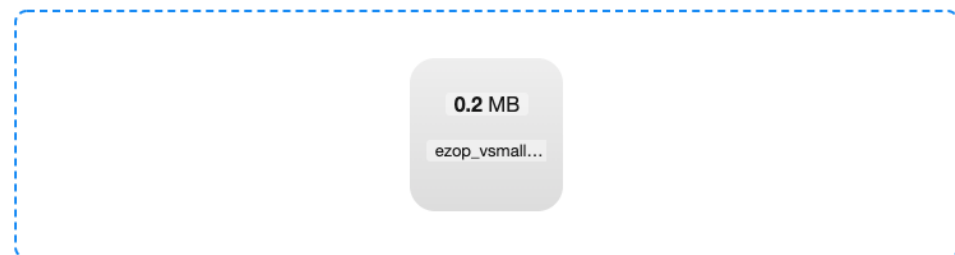
Upload your payment records file.

Have **HIGH CONFIDENCE** that **MOST** of your payment records are **REPORTABLE**? Import now.

**LOW CONFIDENCE?** — [click here to scrub your payment records first.](#)

#### IMPORTANT — BEFORE YOU START:

- We recommend you upload a file with only **one sheet/tab**,
- Check to confirm your file contains **column headers on the first (and only first) row**



Select the **sheet/tab** containing payment records and click 'Continue':

**ezop\_vsmall.xlsx**

☒ 'Activity Spreadsheet' (9 rows)

☐ 'State' (591 rows)

☐ 'Empty Sheet' (no rows)

Cancel

Continue »

Hit 'Continue'.

Next, you will be asked to specify some more information about the nature of the payment data:

Tell Us About This Tab/Sheet's Contents

The form is titled "Tell Us About This Tab/Sheet's Contents". It contains four dropdown menus and two buttons. The first dropdown is labeled "Reporting Entity:" and has "CMS Open Payments" selected. The second dropdown is labeled "Reporting Year:" and has "2021" selected. The third dropdown is labeled "Payment Type (optional):" and is empty. The fourth dropdown is labeled "Payment Source:" and is empty. At the bottom right of the form are two buttons: a red "Cancel" button and a green "Continue »" button.

You will want to specify the Reporting Year (the year the associated payment took place), the Payment Type (General, Research, Ownership) - for the majority of the payments (this selection is optional, but will make it easier to remediate the payments later), and the Payment Source. The Payment Source is the 'system' from which the payment data was pulled. Possible examples include - Concur, your corporation Enterprise Resource & Planning (ERP system), Excel, etc. Knowing the 'Payment Source' (when there are multiple sources) will provide you with filtering options during payment remediation (helps you stay organized) and are not included in the reports sent to CMS.

Click 'Continue'.

Next, you will be taken to a screen where you are asked to map the column names from the Excel Worksheet with a handful of

## Import File - Match Column Titles

Drag and drop **Your Column Titles** to best match **SunshineSpend's Column Titles**:  
(It's not mandatory to match now, but doing so will save you time later.)

### SunshineSpend's Column Titles [\[SHOW ALL\]](#):

(scroll down to view all)

Teaching Hospital Name:   
Teaching Hospital Tax ID:   
Recipient First Name:   
Recipient Last Name:   
Recipient City:   
Recipient State:   
Recipient NPI:   
Product-1:   
Payment Amount:   
Date of Payment:   
Payment Category:

### Your Column Titles:

(scroll down to view all)

External Activity ID (Optional)  
Activity Type  
Activity Name  
Date of Payment (MM/DD/YYYY)  
Product  
Department  
Project (Optional)  
Activity Venue (Optional)  
Activity Country  
Activity State  
Activity City (required if Travel exp...  
Veeva Network ID (Optional)  
Recipient First Name  
Recipient Middle Initial (Optional)  
Recipient Last Name

☒ Save this column mapping for future imports from payment source 'ERP'

« Back

Cancel

Save »

If most of the payments in the Excel Worksheet are type 'General' - you'll want to map, ideally, the Recipient's National Provider Identifier (NPI) or the Recipient's Last Name and City information from your Excel Worksheet's data (right column) to the associated column on the left. If there exists NPI data in your Excel Worksheet, all the associated recipient information (name, address, primary type, specialty, license information, etc.) will be automatically populated. If you don't have the recipient's NPI, your best alternative is to map the recipient's last name and city (or state) information - in which case, a search is automatically performed and, whenever the search results reach an acceptable degree of confidence, the associated recipient information (name, address, primary type, specialty, license information, NPI) will be automatically populated.

Likewise, if most of the payments in the Excel Worksheet are type 'Research' - you'll want to map, ideally, the Teaching Hospital Tax ID or, less ideally because of potential spelling errors, the Teaching Hospital Name information from your Excel Worksheet's data (right column) to the associated column on the left. In either case, a search is automatically performed and, whenever the search results reach an acceptable degree of confidence, the associated recipient (teaching hospital) information (name, address, Tax ID) will be automatically populated.

Map the columns data, and hit 'Save'.

## ADD ROW

When you are remediating payments (see SunshineSpend's Remediation quick start guide), you can click 'Add Row' - in which case a new, blank row is added with the 'Payment Source' set to 'Manual'. Once you specify the associate 'Payment Type' the remediation rules and any specified Automation Options (**Setup** / Automation Options) - will guide you through the rest of the process.

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## DELETING PAYMENTS

Finally, a note regarding how to delete payments:

From the SunshineSpend menu, select **Data Management** / Workbench click the '+' icon to the left of the Reporting Year:

### Workbench





An expanded view of the payments, organized by 'Payment Source' and date - are displayed. Payments entered using 'ezAdd' or 'Add Row' (during remediation) are considered 'Manual' entries. Payments entered using the **Data Management** / Upload / File to Import feature will display the 'Payment Source' (e.g. Concur, your corporation Enterprise Resource & Planning (ERP system), Excel, etc.) - specified as part of the upload process and a time stamp.


# Workbench

## AGENCY & REPORTING YEAR

### CMS 2021

> 2022-01-01 18:27:59 Import - noname / General (9 records)  

> Manual entries (9 records)  

If the logged in user has 'Delete' permissions set (**Setup** / User Maintenance) - they will be able to click the  (garbage pail) icon and delete all the associated payments. Deleting payments can be a useful feature in the scenario where payments are uploaded improperly (e.g. column data is mismatched or not matched). Otherwise, individual payments cannot be deleted from the remediation screen - instead, they should not be tagged as 'Reportable'.