SunshineSpend
GLOBAL TRANSPARENCY AND AGGREGATE SPEND REPORTING

Quick Start Guide - Payment Remediation

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

This document is organized into the following sections:

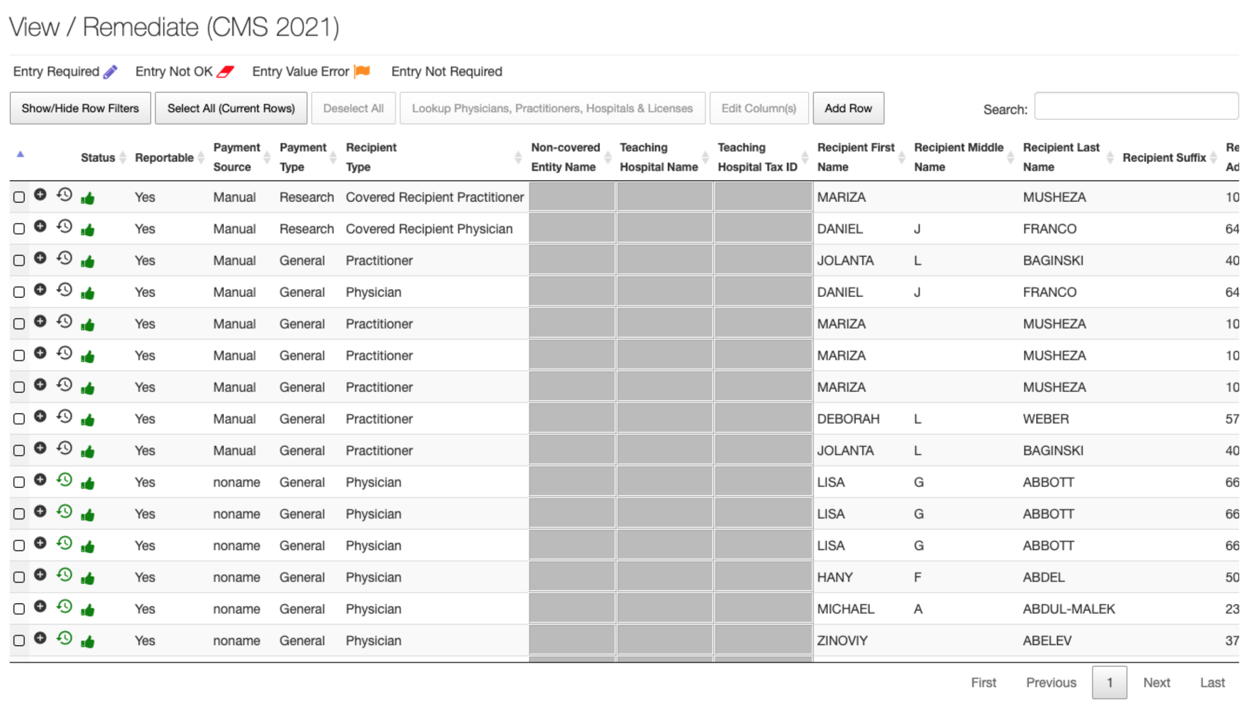
Start the remediation process by logging into a SunshineSpend account that has Remediate (and/or View) functionality enabled (see **Setup**/User Maintenance) and click **Data Management** / Workbench / Remediate from the menu bar.

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 Ad
		Yes	Manual	Research	Covered Recipient Practitioner				MARIZA		MUSHEZA		10
		Yes	Manual	Research	Covered Recipient Physician				DANIEL	J	FRANCO		64
		Yes	Manual	General	Practitioner				JOLANTA	L	BAGINSKI		40
		Yes	Manual	General	Physician				DANIEL	J	FRANCO		64
		Yes	Manual	General	Practitioner				MARIZA		MUSHEZA		10
		Yes	Manual	General	Practitioner				MARIZA		MUSHEZA		10
		Yes	Manual	General	Practitioner				MARIZA		MUSHEZA		10
		Yes	Manual	General	Practitioner				DEBORAH	L	WEBER		57
		Yes	Manual	General	Practitioner				JOLANTA	L	BAGINSKI		40
		Yes	noname	General	Physician				LISA	G	ABBOTT		66
		Yes	noname	General	Physician				LISA	G	ABBOTT		66
		Yes	noname	General	Physician				LISA	G	ABBOTT		66
		Yes	noname	General	Physician				HANY	F	ABDEL		50
		Yes	noname	General	Physician				MICHAEL	A	ABDUL-MALEK		23
		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

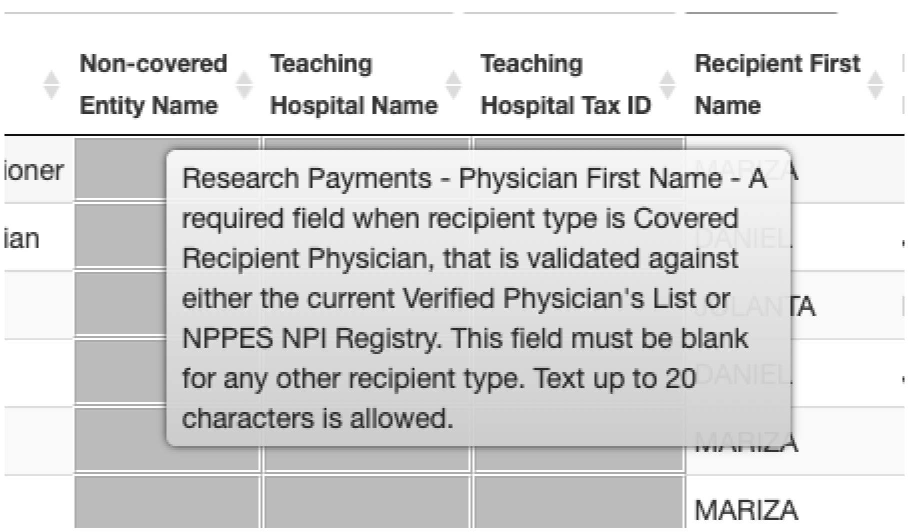
As stated above, the goal of the remediation process is to have all your **Reportable** payments to have the green “thumbs up” icon as their **Status**.

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:

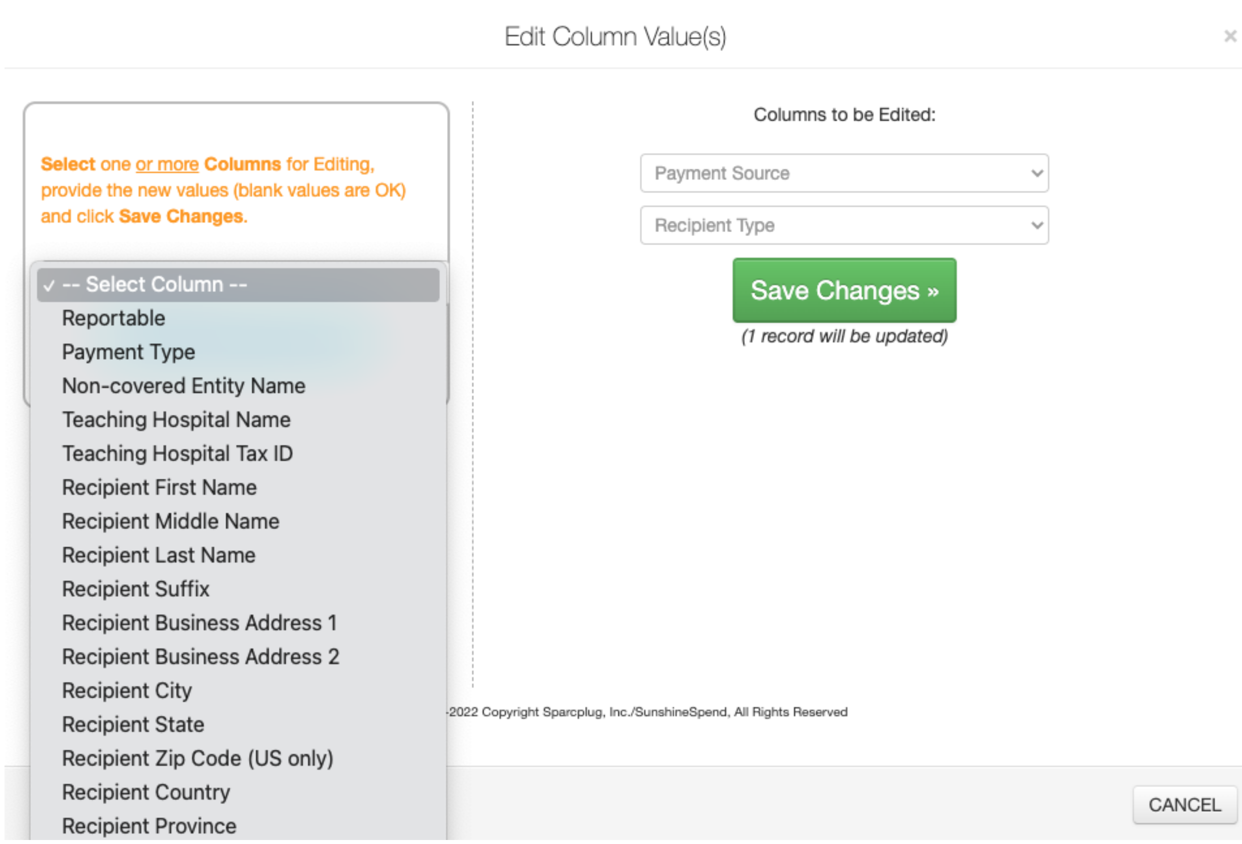


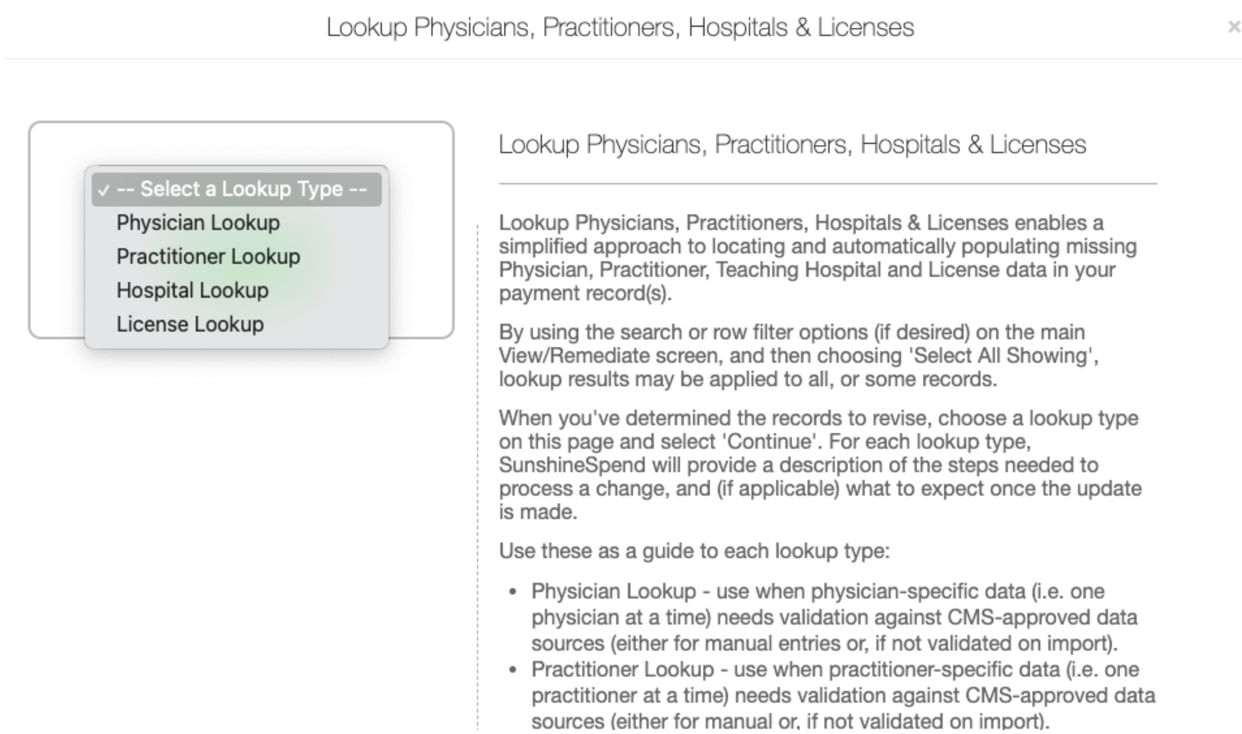
EDITING INDIVIDUAL CELLS

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. <u>All rows that are selected will have the changes applied.</u> This is a powerful way to populate or change many or all payment records at the same time. Selected rows will be highlighted.





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.

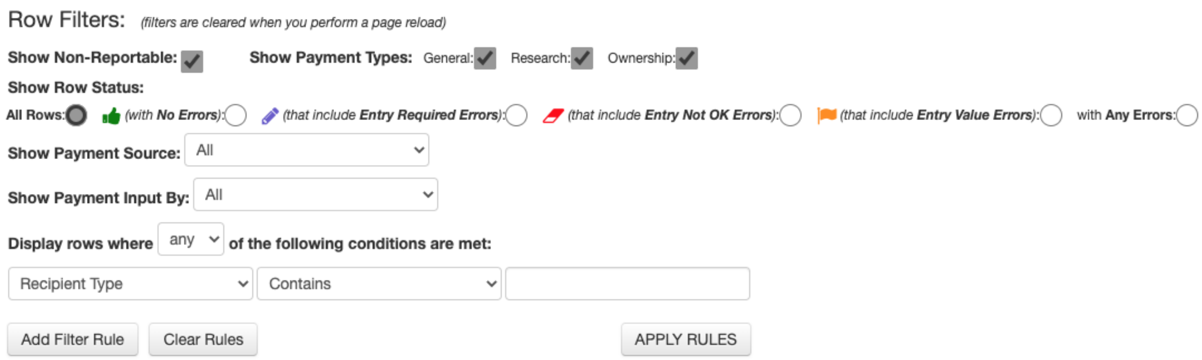
AUTOMATED POPULATION OF RECORD DATA

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’.



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

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).