SunshineSpend
GLOBAL TRANSPARENCY AND AGGREGATE SPEND REPORTING

Quick Start Guide - Payment Input Options

From the menu bar: **Data Management**

This document is organized into the following sections:

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):

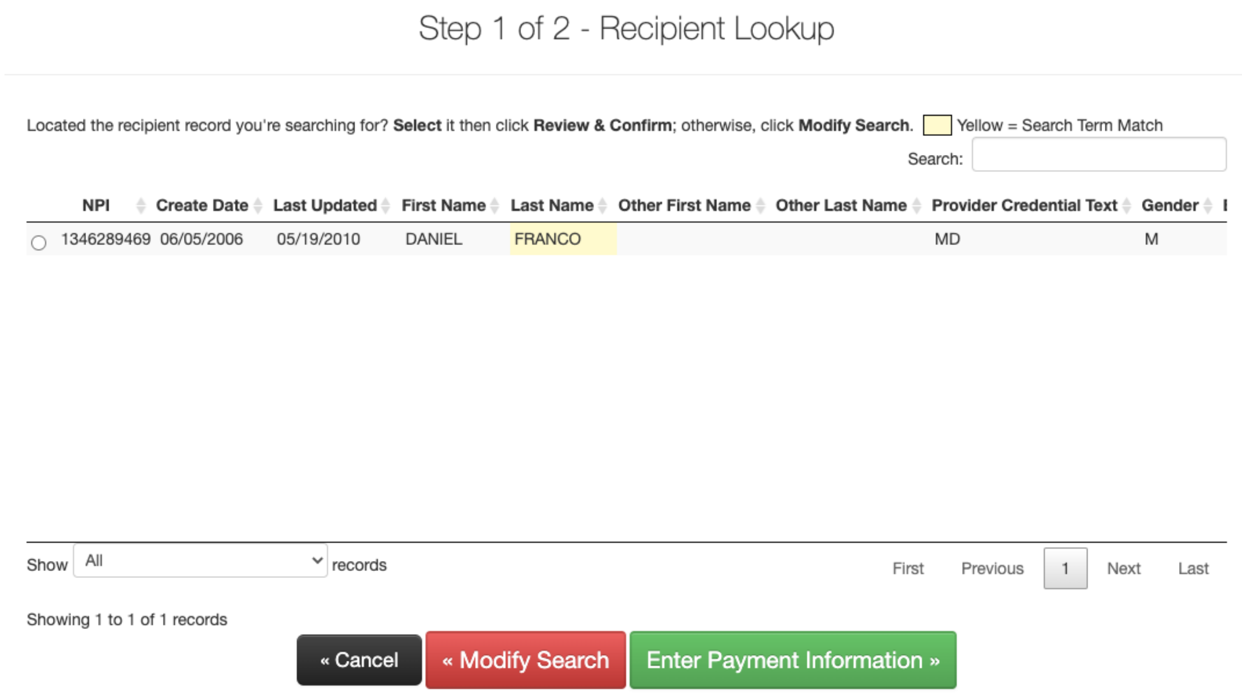
Recipient's City

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

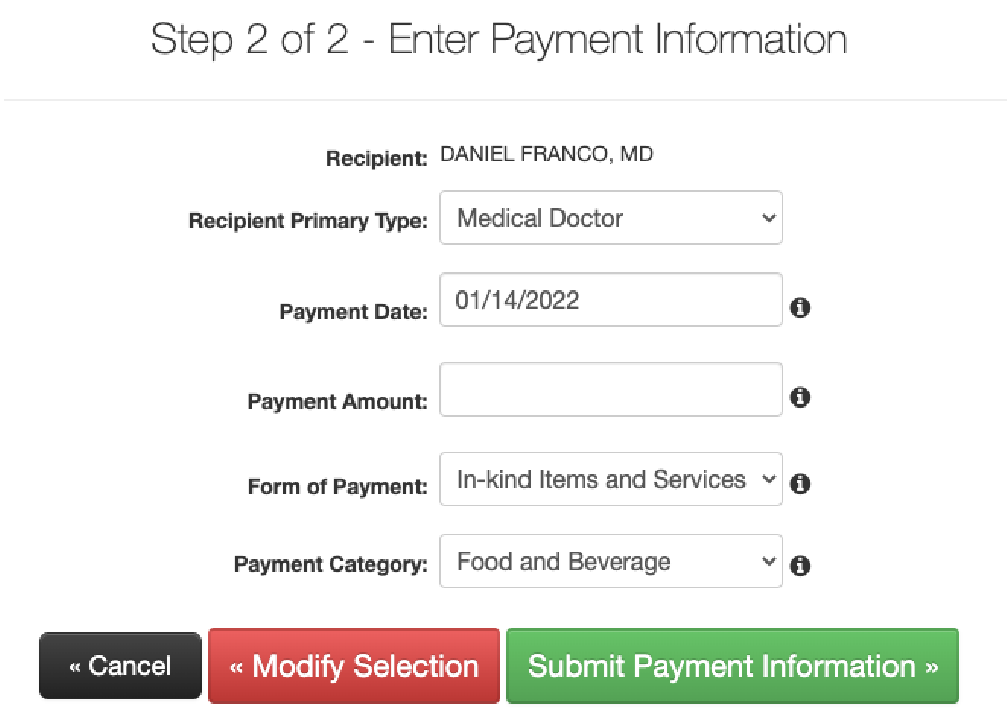
Recipient's State

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

« Cancel | Clear Values | Search »



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



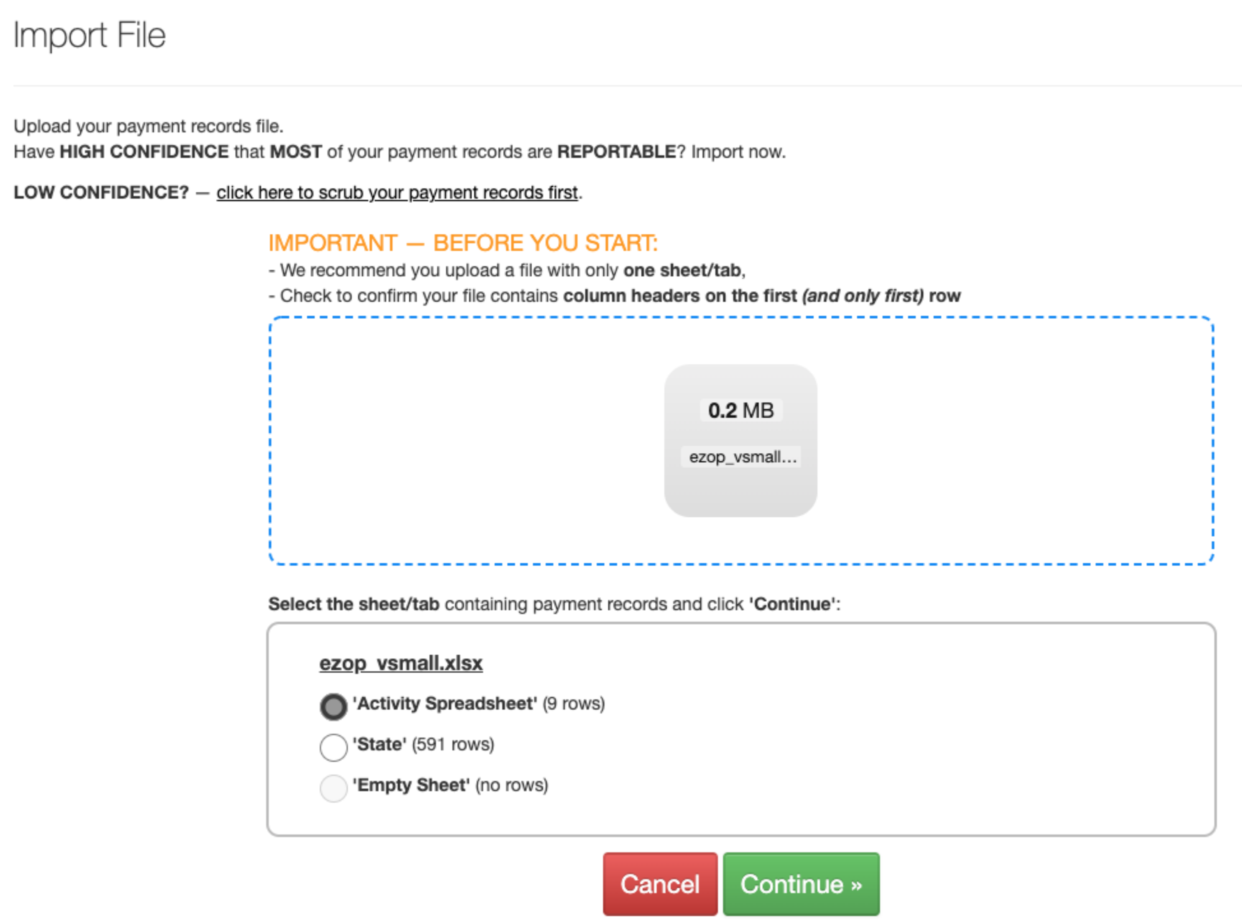
Specify the details of the Payment - Date, Payment Amount, Payment Category and click ‘Submit Payment Information’. Rollover help text is available by putting your mouse over the ‘i’ icon to the right of each field.

IMPORT A FILE

Data Management / Upload / File to Import

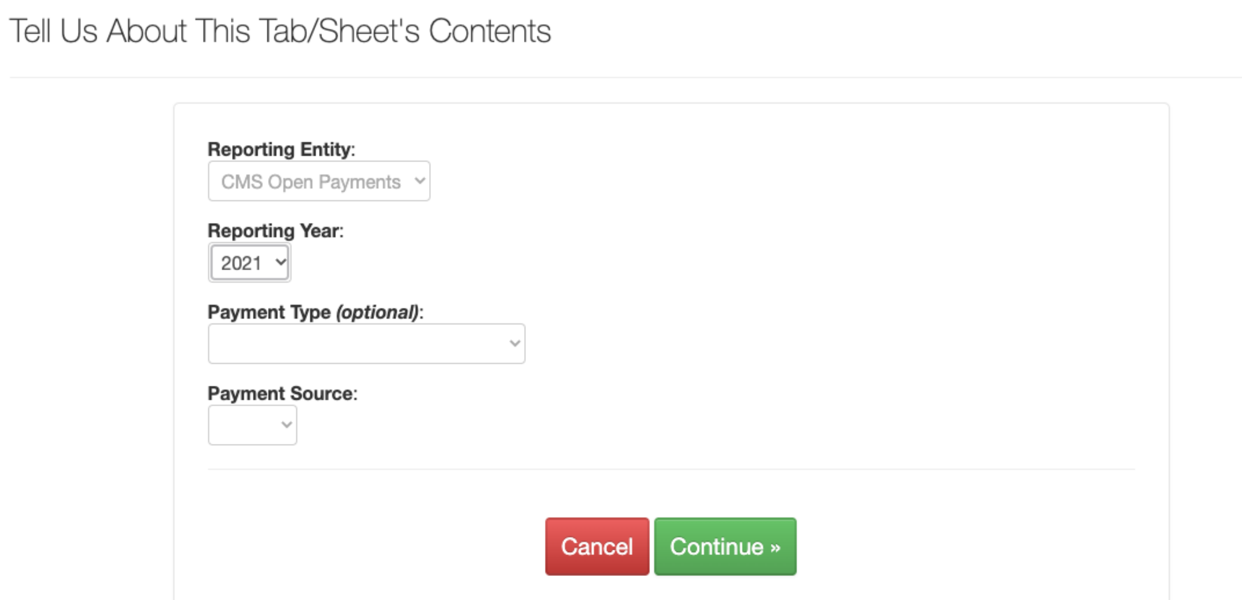
SunshineSpend's 'File to Import' (bulk payment import) feature is primarily a way for your users to login and upload/record Physician or Practitioner payment information from a period of time - monthly, quarterly, bi-annually, yearly. It is recommended to set up unique user logins (**Setup** / User Maintenance) 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.



Hit ‘Continue’.

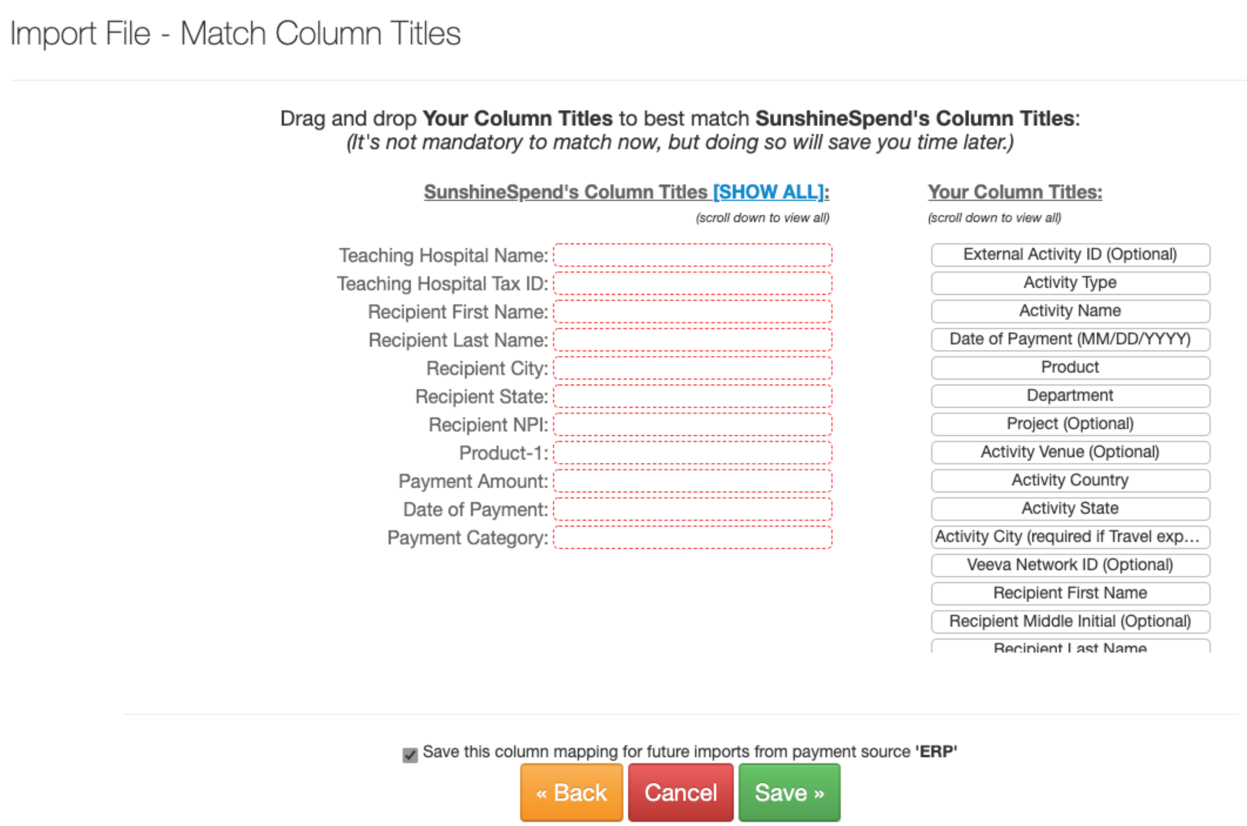
Next, you will be asked to specify some more information about the nature of the payment data:



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



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'.

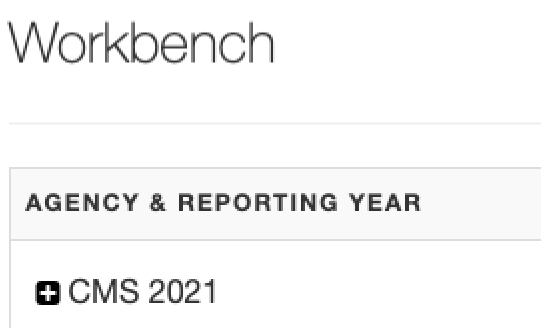
ADD ROW

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.

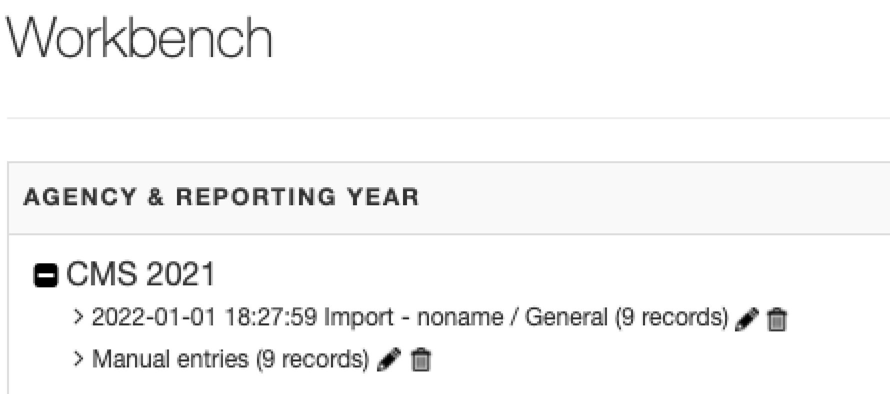
DELETING PAYMENTS

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:



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.



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’.