CMS Web Interface Excel Instructions

Last updated: 11/16/2018

QualityPayment
PROGRAM

Smarter reporting. Smarter care.
CMS Web Interface file upload.

Using the Excel template helps reduce the possibility of upload errors in your reporting, creating a smoother reporting experience.

Here we'll cover:

- Downloading your beneficiary sample spreadsheet from the CMS Web Interface
- Understanding Excel spreadsheet template basics
- Simple reporting with built-in prompts and tips
- Drag-and-drop Excel uploading into the CMS Web Interface

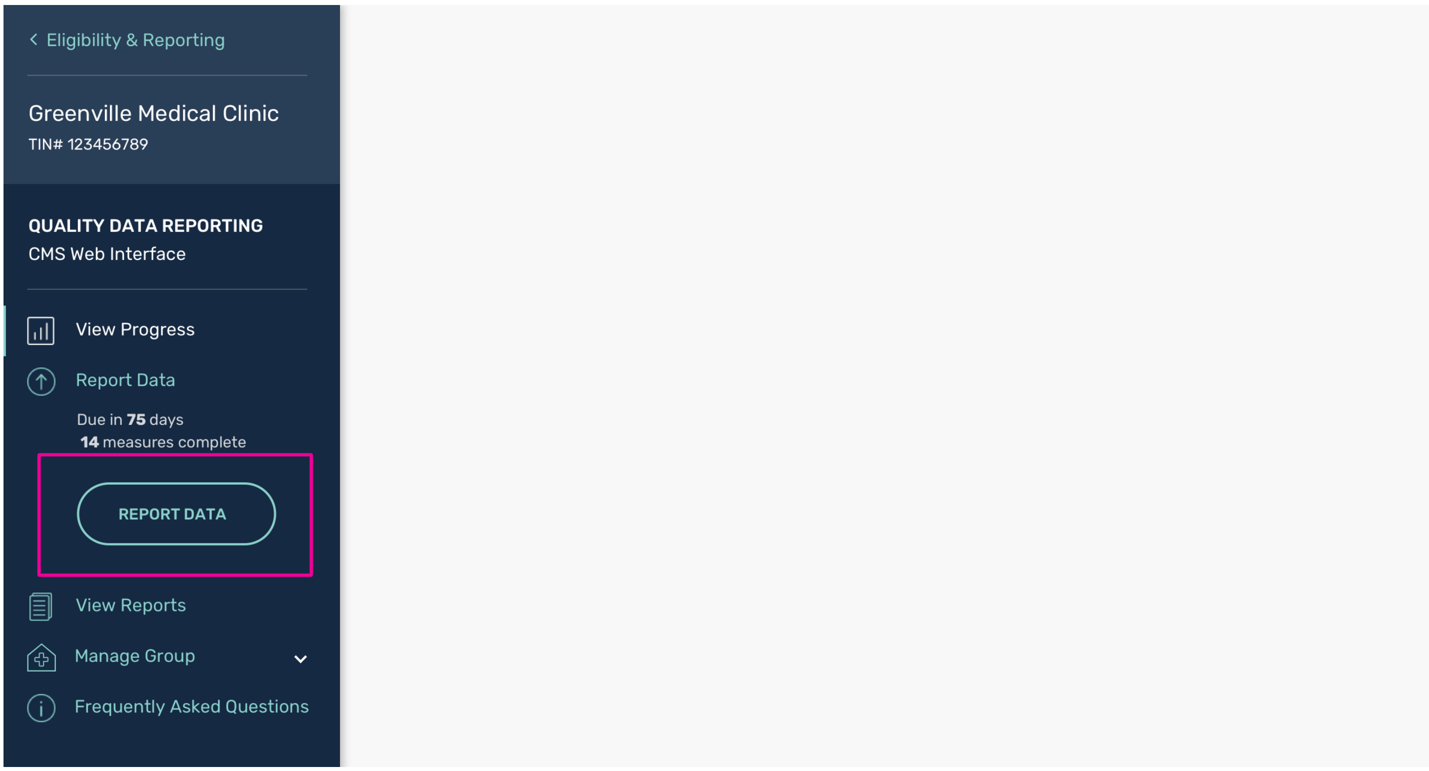
Let's get going!

Contents

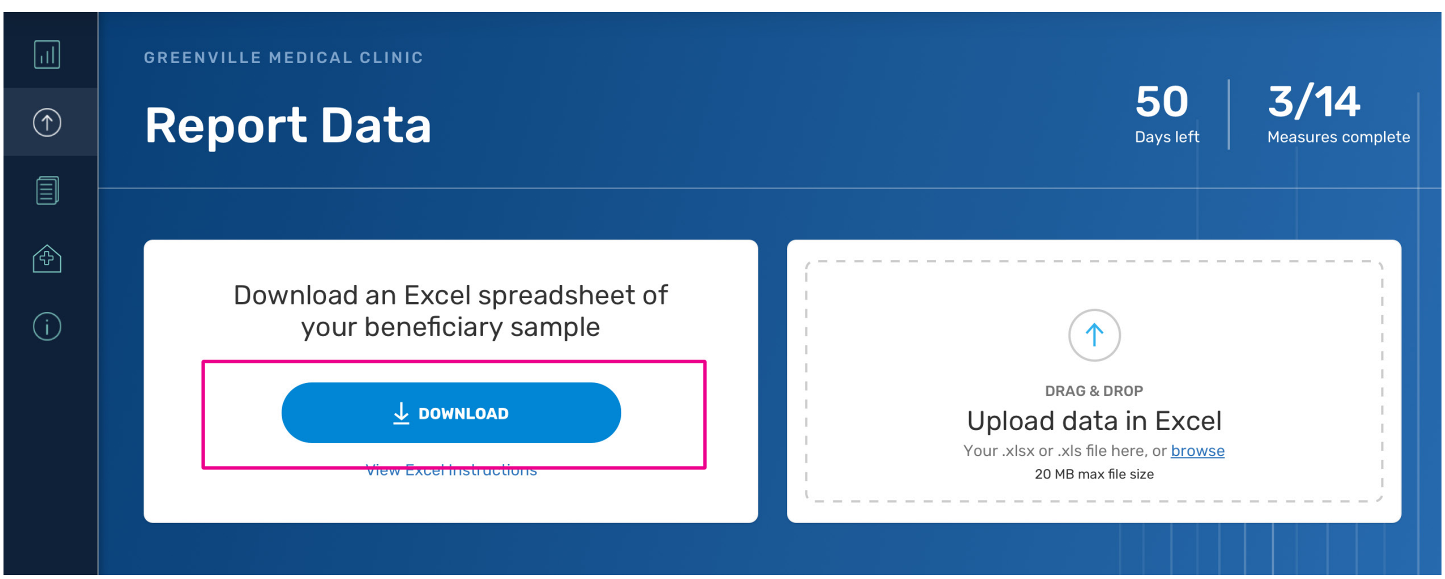
Downloading Your Beneficiary Sample Spreadsheet

To download your sample using the Excel template:

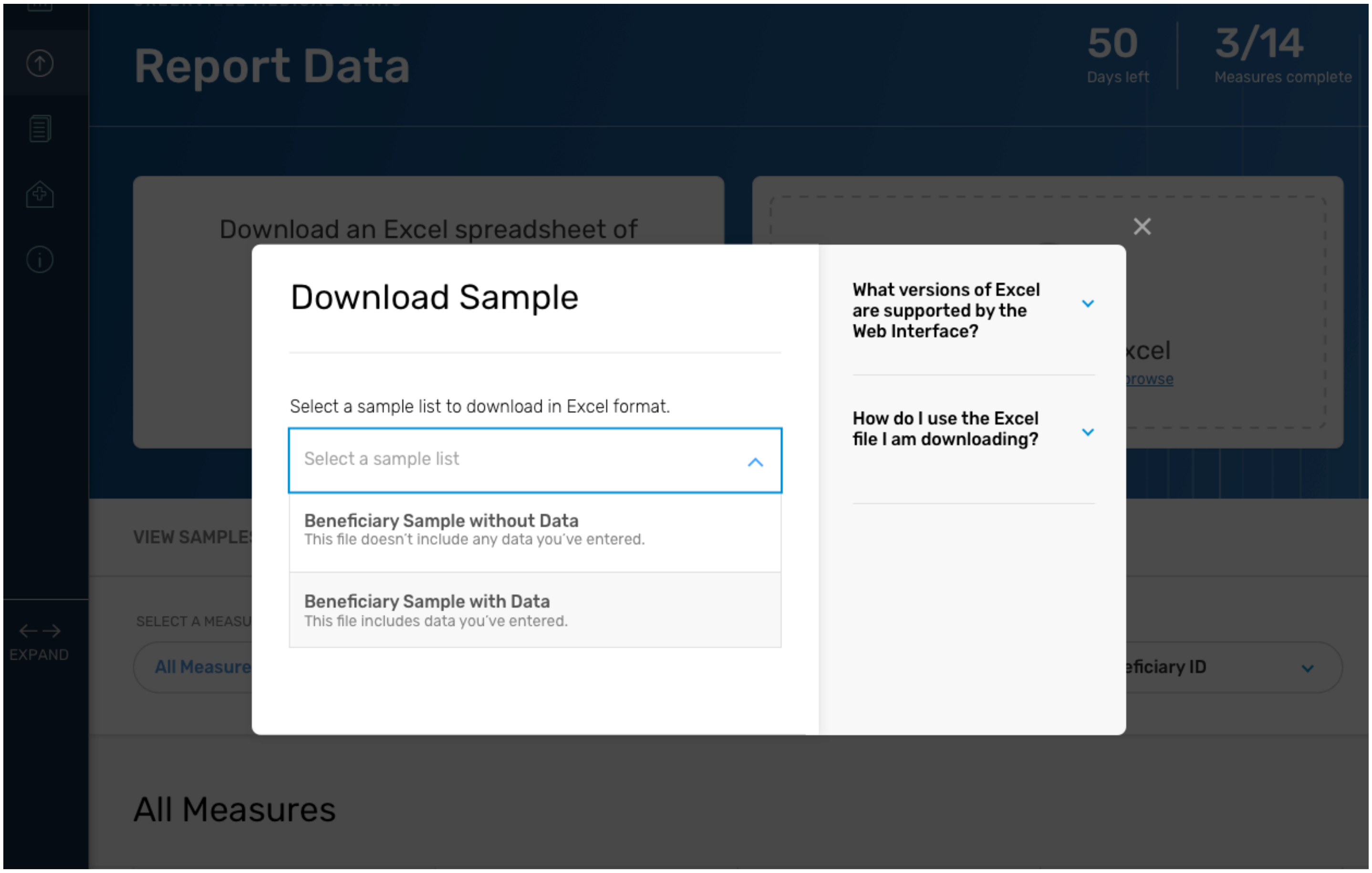
1. Navigate to the Report Data page



2. Click The Download button at the top of the page



3. Select your download preference:



- **Sample without Data** - Your template will only contain CMS pre-filled data. It will be your original sample before your team input any data into the CMS Web Interface.
- **Sample with Data** - Your template will be populated with any data you've already entered into the CMS Web Interface—either manually, via a previous Excel upload, or via API.

If you haven't begun the reporting process, start with the Sample without Data.

Now, let's go through the template itself.

Understanding the Excel Sample Template

Rows & Columns

Each row represents a beneficiary in your sample.

Beneficiary Demographics	Beneficiary Demographics								
Beneficiary ID	Beneficiary ID Type	First Name	Last Name	Gender	Date of Birth (MM/DD/YYYY)	Medical Record Number	Clinic ID	Provider 1 NPI	Provider 2

The blue top-most column headers delineate beneficiary demographic input fields, as well as each of the CMS Web Interface measures.

Beneficiary Demographics	Beneficiary Demographics					
Beneficiary ID	Beneficiary ID Type	First Name	Last Name	Gender	Date of Birth (MM/DD/YYYY)	Medical Rec
638820538A	HICN	Anthony	Kulas	MALE	07/29/1988	
181897483E	HICN	Alexandro	Hane	FEMALE	06/10/1946	
137716098C	HICN	Imelda	Johnston	MALE	03/13/1996	
690504841C	HICN	Wilton	Boehm	FEMALE	02/05/1988	
234495903E	HICN	Althea	Krajcik	FEMALE	11/04/1945	

Pre-Filled Data

Light gray cells represent information that is pre-filled by CMS, and is not editable by you. The following fields are not editable:

Beneficiary Demographics	Beneficiary Demographics					
Beneficiary ID	Beneficiary ID Type	First Name	Last Name	Gender	Date of Birth (MM/DD/YYYY)	Medical Record Number
638820538A	HICN	Anthony	Kulas	MALE	07/29/1988	
181897483E	HICN	Alexandro	Hane	FEMALE	06/10/1946	
137716098C	HICN	Imelda	Johnston	MALE	03/13/1996	
690504841C	HICN	Wilton	Boehm	FEMALE	02/05/1988	
234495903E	HICN	Althea	Krajcik	FEMALE	11/04/1945	
182594727C	HICN	Eulah	Roob	FEMALE	02/16/1965	
823621503E	HICN	Mariah	McLaughlin	FEMALE	10/24/1964	

- Beneficiary ID
- Beneficiary ID Type
- First Name
- Last Name
- Gender
- Date of Birth
- Beneficiary rank in each measure
- Discharge Dates for CARE-1

Measure Questions

Each measure header contains the following information underneath it:

- **Beneficiary rank** - This field is pre-filled by CMS, and not editable by you. If a beneficiary in your sample is ranked in a specific measure, they will have a number in the Rank column. Beneficiaries in your sample may not be ranked in all of the CMS Web Interface measures.
- **Measure questions** - If a beneficiary is ranked in the measure, the question input fields will be white or light blue. You can edit these fields. This is where you will input data. If a beneficiary is NOT ranked in that measure, the fields will be dark gray, and you do not need to enter data. You do not need to answer questions for beneficiaries who are not ranked in the measure.

Beneficiary Demographics	CARE-2: Screening for Future Fall Risk			
Beneficiary ID	CARE-2 Rank	Is the patient qualified for this measure? Learn More	QPP Service Center Case Number	Was the patient screened for future fall risk at least once during the measurement period (January 1 - December 31, 2018)? Learn More
805243332C	14	Yes		Yes
187163002C	70	Yes		No
873168232E	180	No - Other CMS Approved Reason	1234567	
436146351A	483	Denominator Exclusion		
740511546A				

Measure Question Help

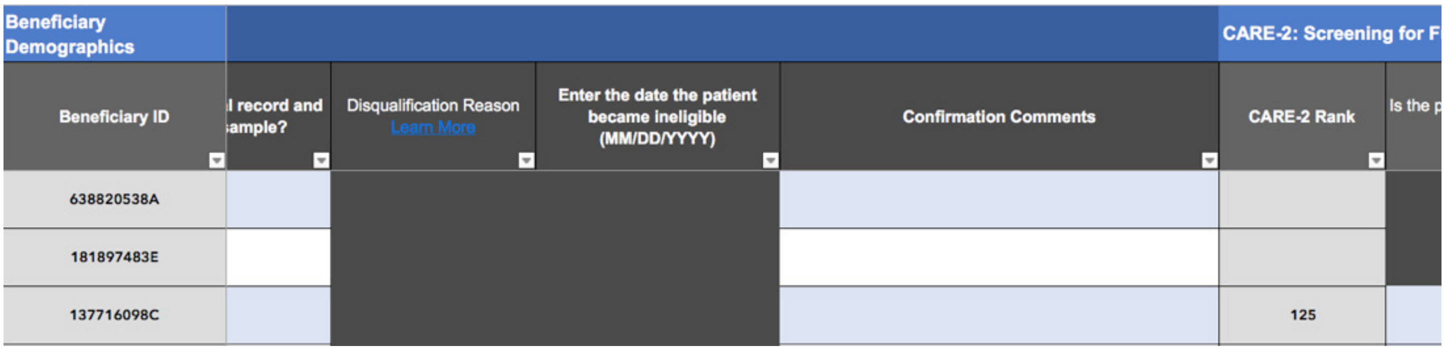
Click on the "Learn More" link in the measure questions column header to see additional instructions on how to answer the measure questions.

Beneficiary Demographics	PREV-5: Breast Cancer Screening			
Beneficiary ID	PREV-5 Rank	Is the patient qualified for this measure? Learn More	QPP Service Center Case Number	Was screening f between October 1,
309735511B	67			
416038802D	131			
650467482A	213			

Measure Name	Question	Help
PREV-5	Is the patient qualified for this measure?	Denominator Exclusions: 1) Women who had a bilateral mastectomy or who have a history of a bilateral mastectomy or for whom there is evidence of a right and a left unilateral mastectomy. OR 2) Patients age 65 and older in Institutional Special Needs Plans (SNP) or Residing in Long-Term Care with a POS code 32, 33, 34, 54 or 56 any time during the measurement period.
	Was screening for breast cancer performed between October 1, 2016 and December 31, 2018?	• Total lookback period for a mammogram includes the measurement year, the year prior to the measurement year, and a 3 month grace period for a total of 27 months. • Documentation in the medical record must include both of the following: a note indicating the date the breast cancer screening was performed AND the result or findings. • Documentation of 'normal' or 'abnormal' is acceptable. • Patient Reported Requirement: date and type of test AND result/finding. • Screening includes: screening, diagnostic, film, digital or digital breast tomosynthesis (3D) mammography. • MRI, Ultrasound and Biopsies are not considered breast cancer screening for this measure. • Documentation of screening for breast cancer may be completed during a telehealth encounter.

Locked Titles

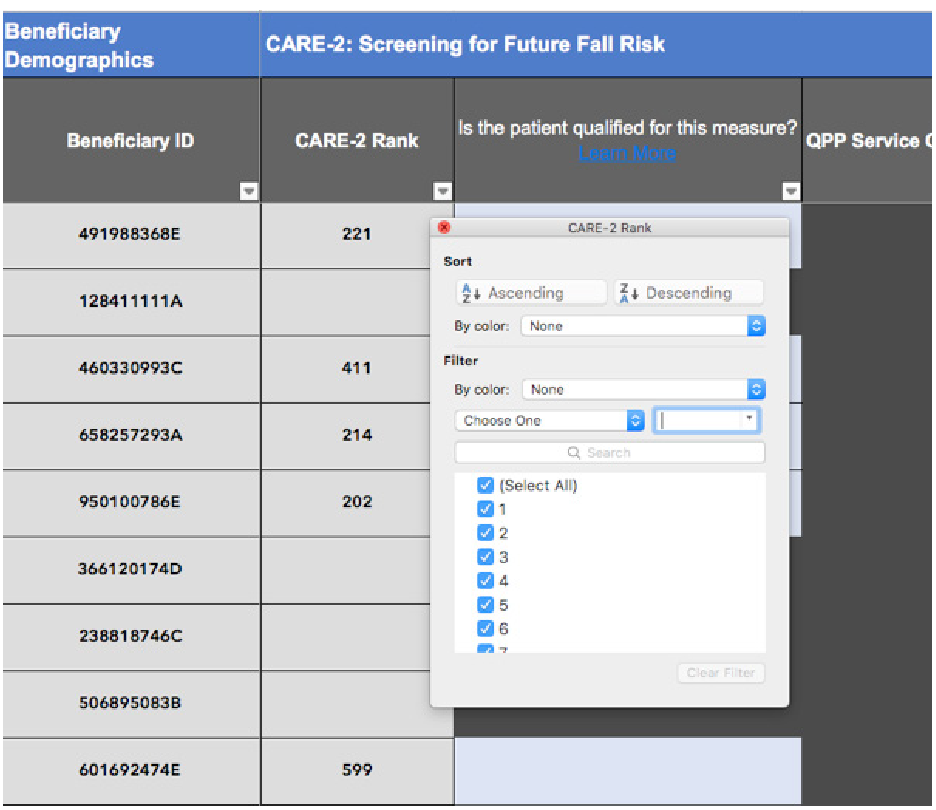
For your easy input across large samples, the measure titles, question column headers, and Beneficiary ID column are locked, so you can scroll through the template without losing context of what you're seeing and entering.



Sort & Filter

For your convenience, we have also included sort and filter functionality on each column header. By clicking on the sort functionality, you can sort beneficiaries based on their rankings.

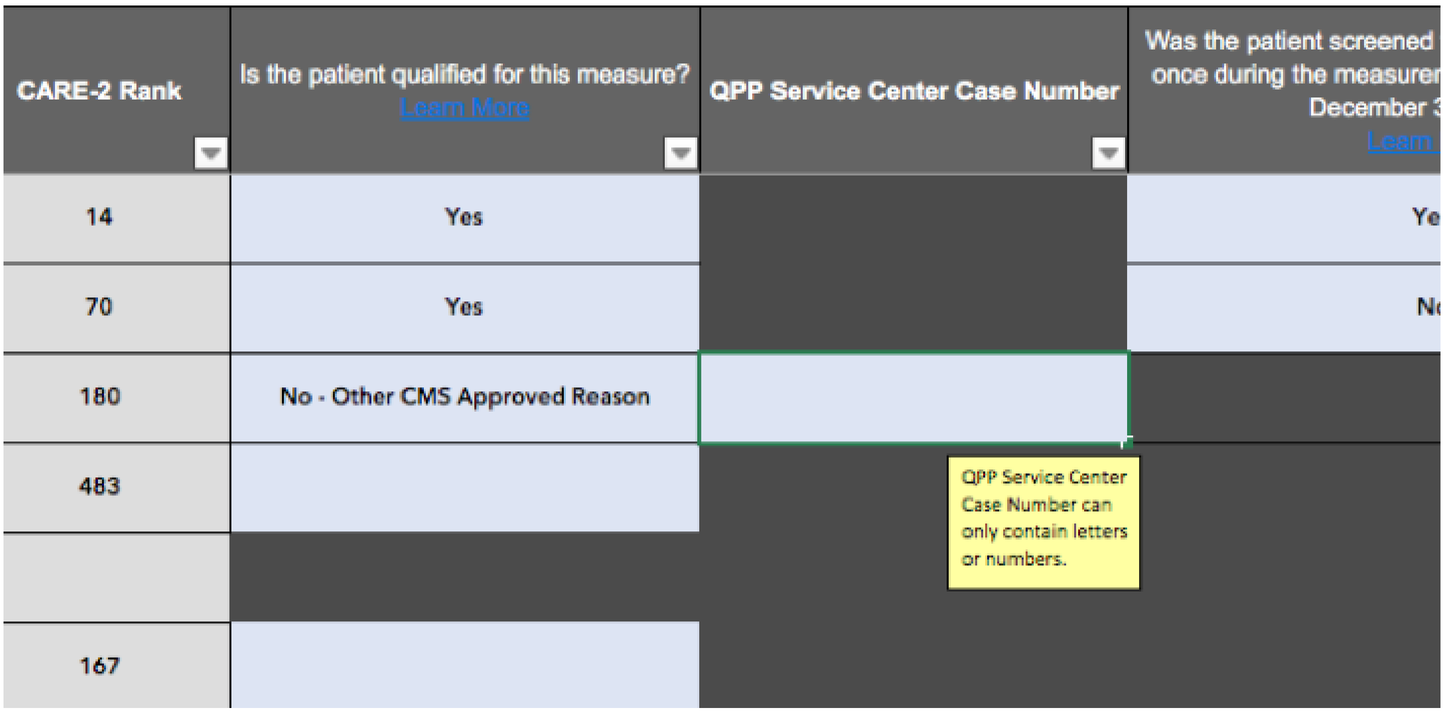
For example: If one team member is responsible for providing data for a single measure, they may want to sort the sample from lowest to highest rank for that particular measure. You can use the arrows at the top of each column header to filter or sort by a certain criteria within that column. You can always click "**Clear**" under the "**Data**" tab to go back to the original sample order.



Entering Beneficiary Data

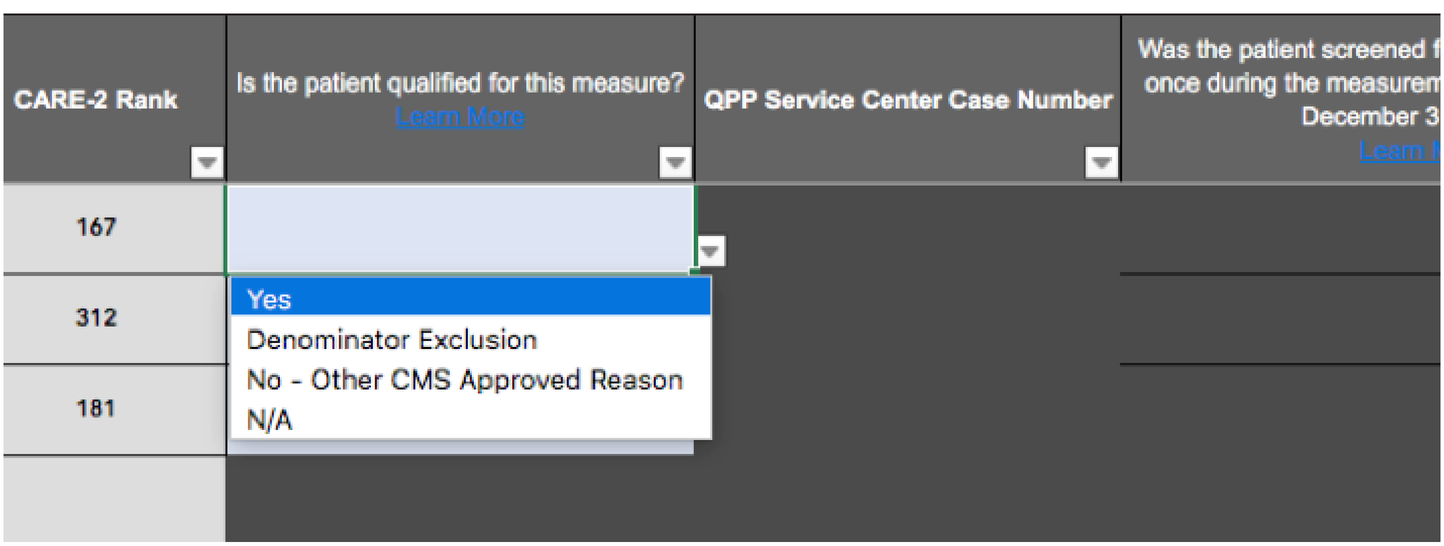
Built-In Tips

Some cells contain tips that explain and clarify how to answer each question. Simply mouse over the cell, and a pop-up tip will appear.

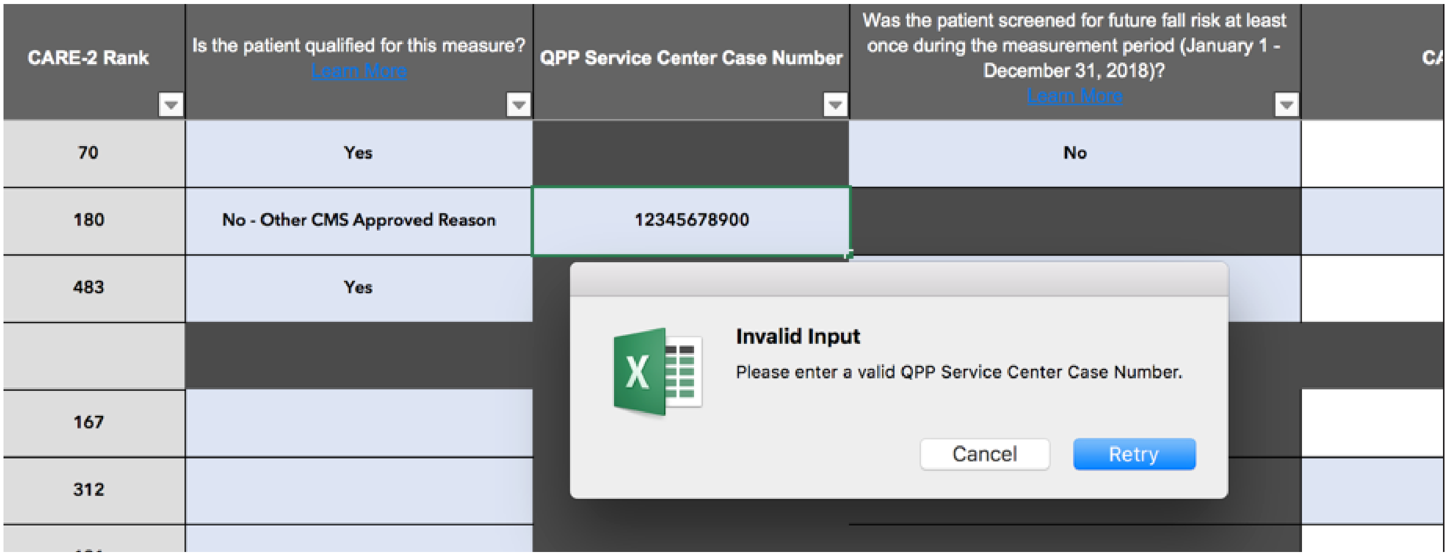


Drop-Down Answers

To limit the possibility for human error, we've created drop-down selections for users for each question. The drop-down shows all of the possible appropriate answers to a question. Simply select one of the answers provided. No answers outside of those listed in the drop-down will be accepted.



Text-Input Answers



CARE-2 Rank	Is the patient qualified for this measure? Learn More	QPP Service Center Case Number	Was the patient screened for future fall risk at least once during the measurement period (January 1 - December 31, 2018)? Learn More	CA
70	Yes		No	
180	No - Other CMS Approved Reason	12345678900		
483	Yes			
167				
312				

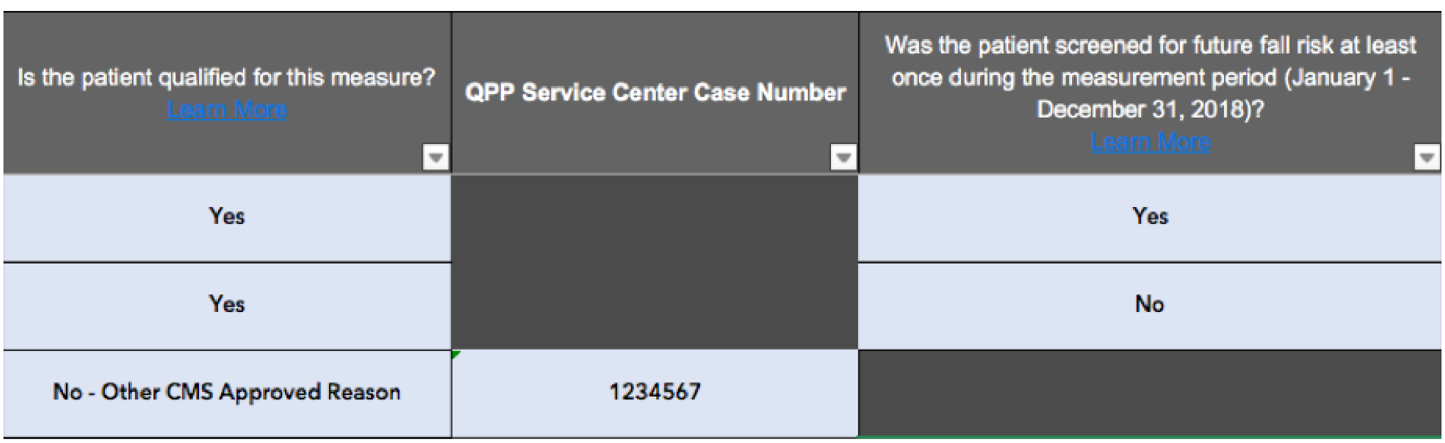
Some fields require you to type text into the input field. In these cases, the field will be limited to the appropriate number of characters required for the input field.

For example: QPP Service Center ticket numbers cannot be longer than 10 characters. If you input more than 10 characters, the Excel template will show an error message.

Conditional Inputs

Some input fields are not required until an answer to a previous question is chosen that requires that data.

For example: If you choose "**No - Other CMS approved reason**" for a patient confirmation question, you will be required to input a QPP Service Center ticket number (otherwise the ticket number is not required.) In these cases, the conditional input fields are not activated and show in dark gray until they become required at which point they become active and white or light blue.



Is the patient qualified for this measure? Learn More	QPP Service Center Case Number	Was the patient screened for future fall risk at least once during the measurement period (January 1 - December 31, 2018)? Learn More
Yes		Yes
Yes		No
No - Other CMS Approved Reason	1234567	

Date Formats

You can input any date format you'd like, and the Excel template will automatically standardize the date into the correct **MM/DD/YYYY** format. This feature will help eliminate the format upload errors.

Can you locate the patient's medical record and is the patient qualified for the sample?	Disqualification Reason [Learn more]	Enter the date the patient became ineligible (MM/DD/YYYY)
Not Qualified for Sample	Deceased	12/18/2018
Not Qualified for Sample	Moved out of Country	August 23

Enter Intentionally Blank Data

Any fields that you leave blank will not be saved into the system--and any data you've previously entered in the system will not be overwritten.

For questions where you want to intentionally enter a blank to be saved into the system, select "**N/A**" for that field from the drop-down. Choosing "N/A" will intentionally delete any data that was previously put into the system for that field.

CARE-2 Rank	Is the patient qualified for this measure? [Learn More]	QPP Service Center Case Number	Was the pa… once durin…
14	Yes		
70	Yes		
180	[illegible]	1234567	
483	[illegible]		

Yes
Denominator Exclusion
No - Other CMS Approved Reason
N/A

Update Demographic Beneficiary Data

You can edit the following beneficiary demographic data using the Excel template:

- **Medical Record Number** – You can record a number associated with your internal systems here, for easy medical record location. This field is not required.
- **Top Providers 1, 2 & 3** – You can record the top 3 NPIs that the beneficiary visited most often, to more quickly locate the beneficiary's medical records internally. These fields are also not required.
- **Clinic ID** – You can associate beneficiaries with clinics in your organization, to more quickly track down their medical records internally. This field is not required.
- **General Comment** – You can use this field to track any additional notes on where the beneficiary's medical record can be found internally. This field is not required.

There are some beneficiary demographic data that you cannot edit through the Excel template:

- First Name
- Last Name
- Gender
- Date of Birth

You can edit this beneficiary demographic data ONLY using the CMS Web Interface manually. This process limits the difficulty of locating patients in the case of an incorrect entry.

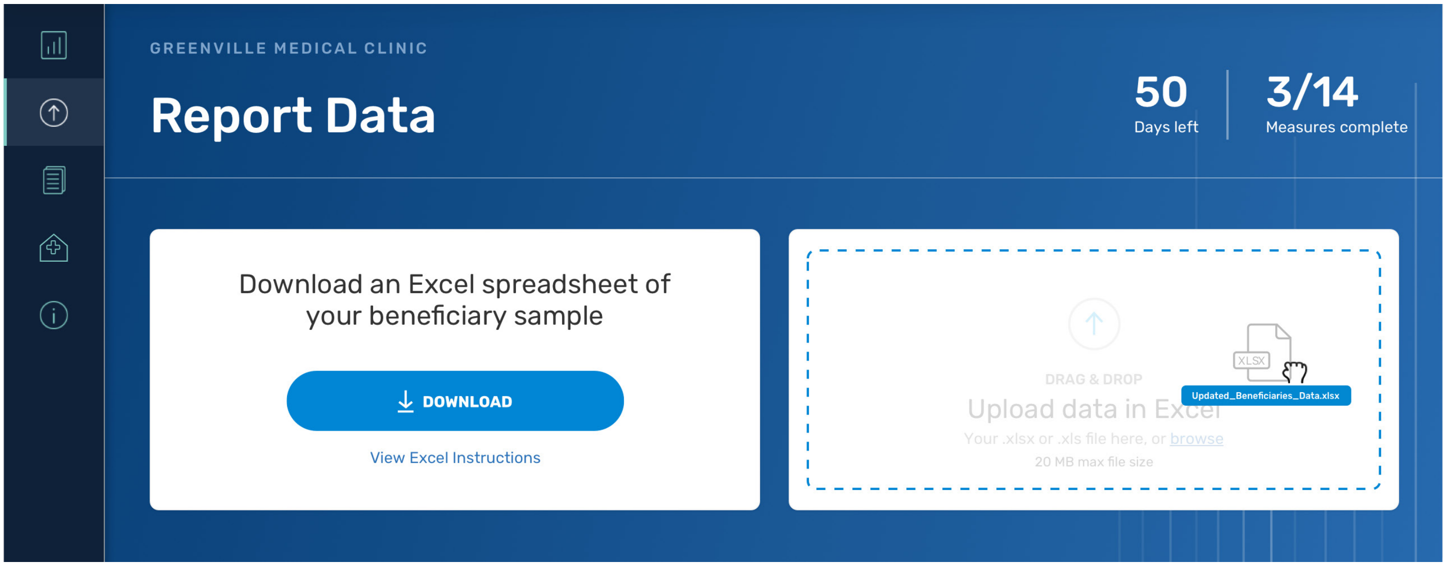
Uploading Your Beneficiary Data

To upload data to the CMS Web Interface, you can either:

- Simply drag and drop your completed Excel template into the Upload field in the CMS Web Interface

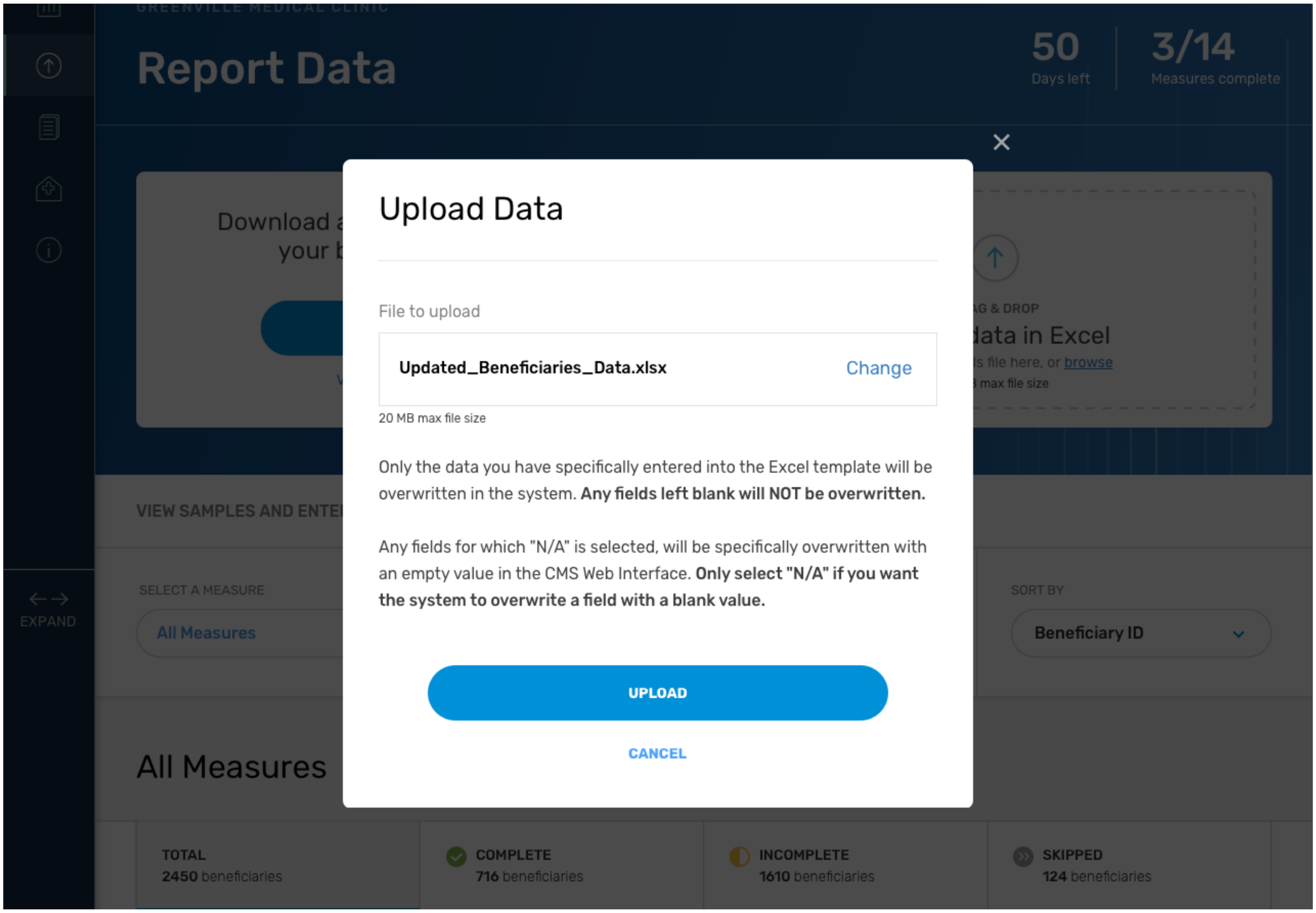
  OR

- Use the "Browse" functionality within the Upload field in the CMS Web Interface to locate the appropriate Excel file to upload from your computer's file system.



When the file is uploaded, you'll be notified that your data will be overwritten in the system.

When you are ready to proceed, click "Upload."



You can upload Excel files as many times, and as frequently, as you'd like. You can upload partially complete Excel files, one measure at a time—or one beneficiary at a time if you'd like.

You can also add a new column or delete any existing columns in the Excel template at your convenience. As long as you don't edit existing column headers, your upload will not be effected. A column added by you will not be saved into the system, and a deleted column will not impact any data already in the system for that measure.

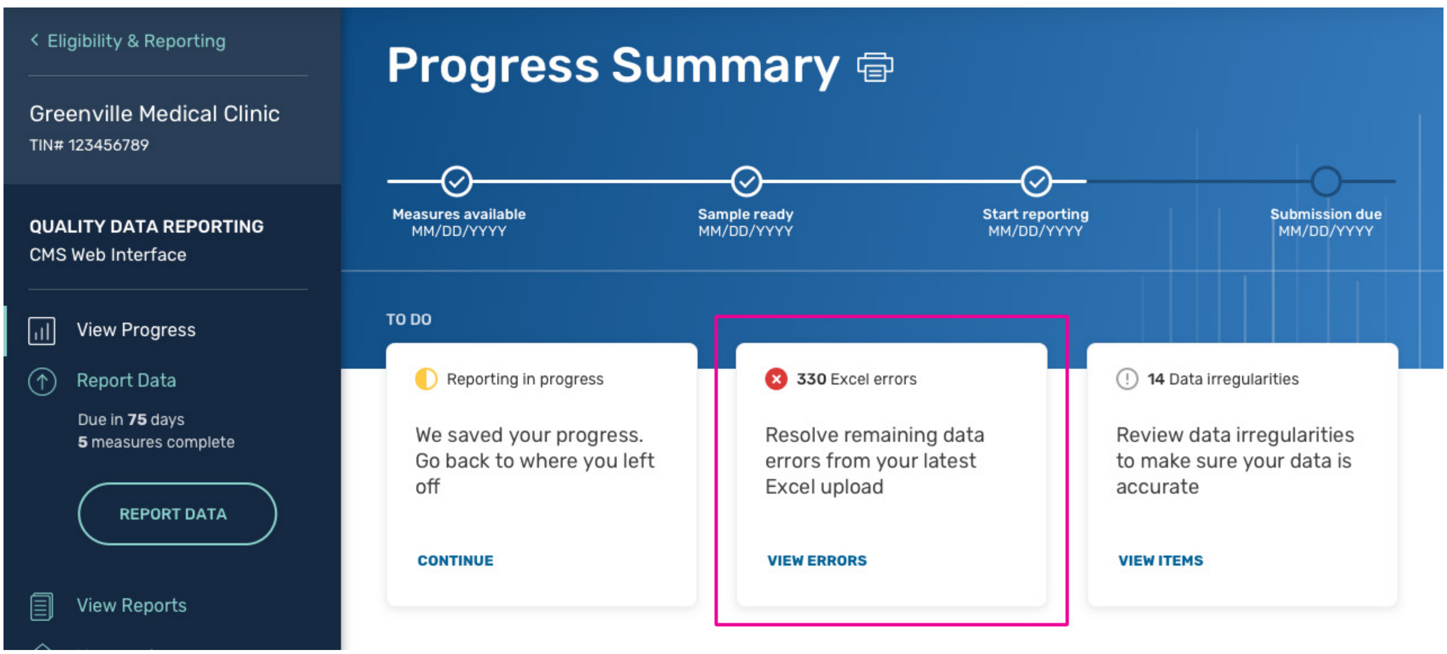
Only the data that you have specifically entered into the Excel template will be overwritten in the system. Any fields that are left blank will NOT be overwritten. Any fields for which "N/A" is selected will be specifically overwritten with an empty value in the CMS Web Interface.

Resolving Excel Upload Errors

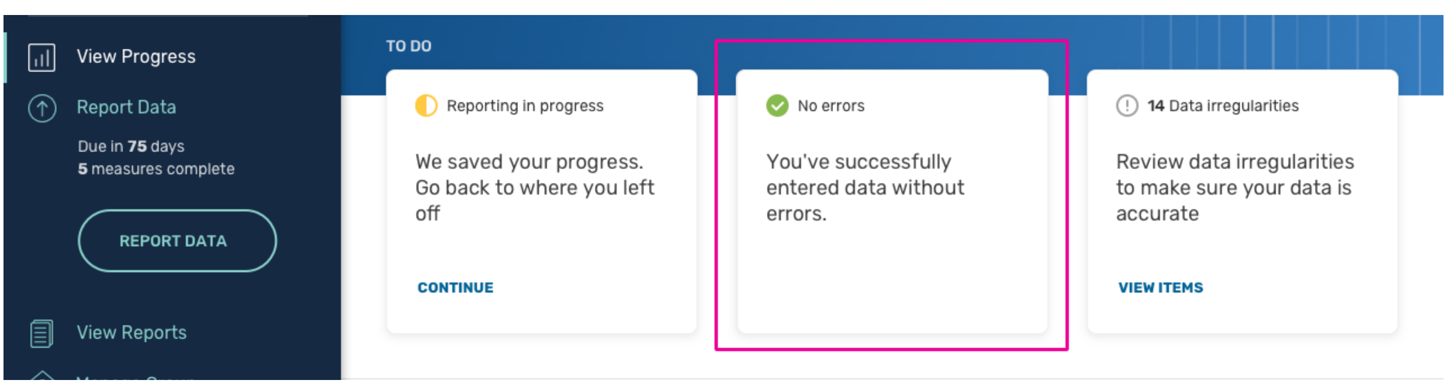
Finding Excel Errors

Once your Excel file is uploaded into the system, you may find errors in some of your beneficiary data. The system will not update the measure data for which errors are found—you'll need to re-upload or manually enter the data to fix the error.

If you have any errors to resolve, the View Progress page will also display a "To Do" item at the top of the page titled "Excel errors" and will show the number of Excel errors your team has remaining from the latest Excel upload. Clicking on the "View Errors" link will take you to the Report Data page where you can see the list of Excel errors and resolve them manually, via another upload, or via the API.

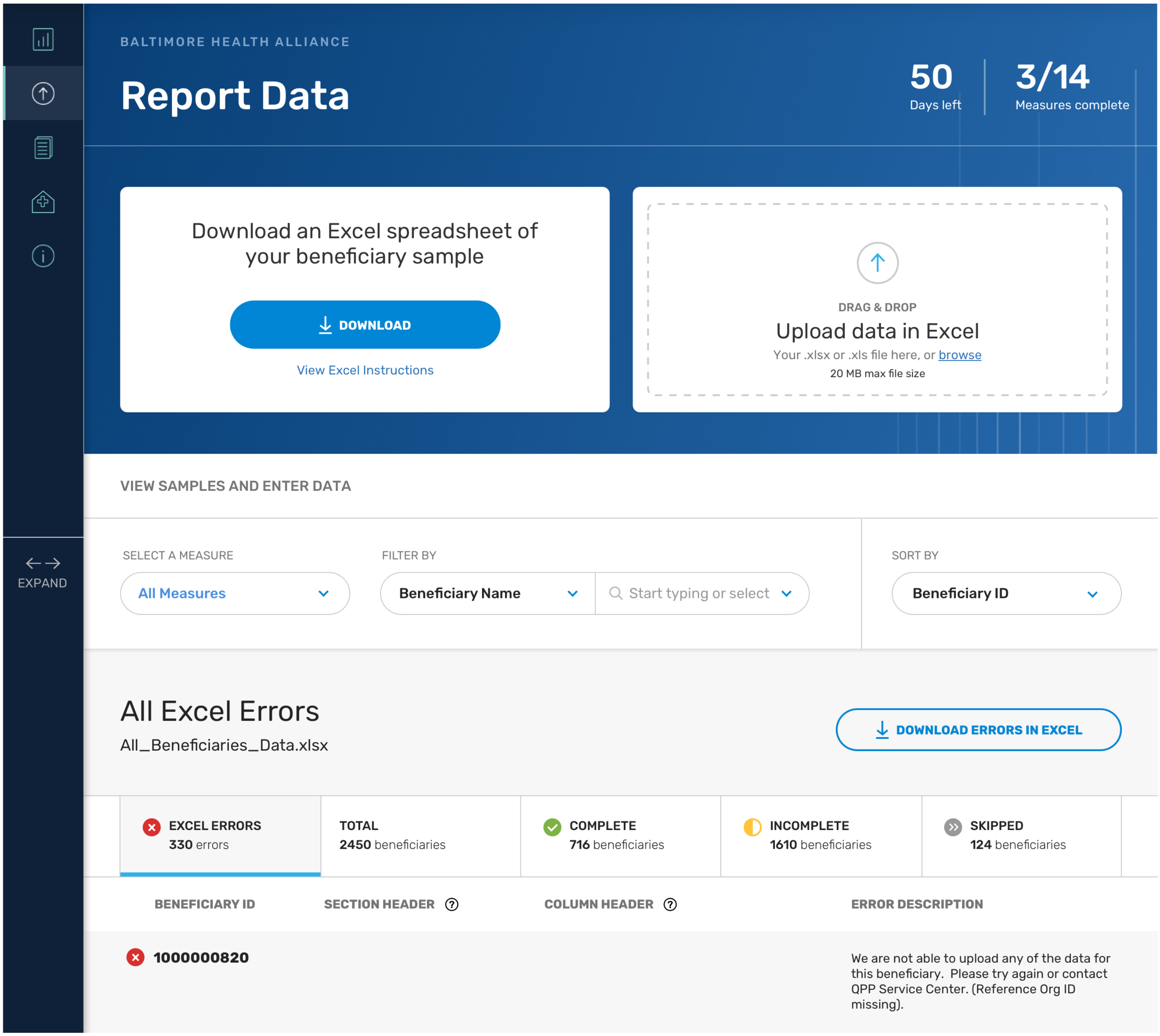


If your team currently has no Excel errors, the box will have a green checkmark and there will not be a link to the errors tab.



Another way to find the list of errors is to do the following:

1. In the CMS Web Interface, navigate to the Report Data page.
2. Click on the “Excel Errors” tab at the top of the sample list (if you don’t have any Excel errors, there won’t be an error tab).

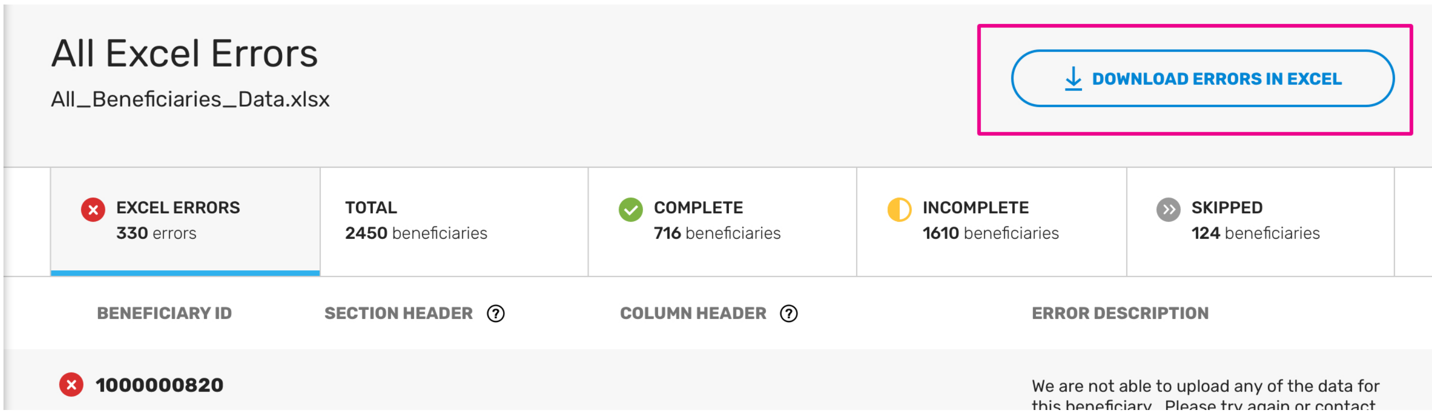


Excel errors will always show the errors from the latest Excel upload. Any errors from previous uploads will always be erased when a new file is uploaded.

Resolving Errors

Once you have located the errors in your submitted data, you can resolve them manually through the CMS Web Interface (no matter which method you originally used), through another Excel upload, or through an API call.

From the “Excel Errors” tab on the Report Data page, you can download your Excel beneficiary sample template with the errors highlighted in the cell that error occurred.



If you’ve downloaded your Excel beneficiary sample template with the errors highlighted from the Report Data page, Column A of this file will identify in red text the number of errors in each row. Also, each cell that has an error will be colored red for ease of locating and correcting data. You can then edit data in the Excel template and re-upload it to the CMS Web Interface.

	Beneficiary Demographics								
Number of Errors Found	Beneficiary ID	Last Name	Gender	Date of Birth (MM/DD/YYYY)	Medical Record Number	Clinic ID	Provider 1 NPI	Provider 2 NPI	Provider 3 NPI
1	1AG4TE5MK73	Langworth	FEMALE	01/01/1947	2341415	669384	Macy Turcotte	Gaetano Smitham	
1	1EE4PM5MG12	Satterfield	MALE	01/01/1951	3452413	205443	Claude Osinski	Gaetano Smitham	
1	1XU4MA1VT87	Runolfsson	FEMALE	01/01/1947	8566354	983092	Burnice Rath	Jake Smitham	
3	211111111A	Kilback	FEMALE	01/01/1964	3452414		Easton Fritsch		
2	211111112A	Smitham	FEMALE	01/01/1948	8254353		Meaghan Bernhard		
1	311111113A	Ziemann	MALE	01/01/1961	5642434	225173	Kyleigh Kertzmann	Eveline Gutkowski	Kelly Upton
1	3XA1AA5XM87	Beahan	MALE	01/01/1945	8254352	708006			

Errors & the API

When a developer user sends data to the CMS Web Interface API for which the syntax is correct but the semantics are problematic, the system will reject the data and respond with a response code that details the error. The response body will include additional detail, providing the user with context around what needs to be corrected. As data must be corrected before the API can recognize and accept it into the system, the user will never see errors from the API in the CMS Web Interface but only in the responses to the users’ API calls.