vitalware®

VitalCDM® Classic

User Guide

November 09, 2023

Vitalware's mid-cycle revenue product portfolio is the healthcare industry's best solution for providing visibility and continuity in chargemaster management, documentation, charge capture, and regulatory code references.

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Chapter 1: VitalCDM Overview

Vitalware's VitalCDM provides you with the ability to view, update, and analyze chargemaster and workflow data fluidly. VitalCDM can handle your organization's entire chargemaster, including all related data files, and aggregate everything into a unified system that provides insight to address and fix issues to mitigate compliance risks, increase CDM efficiency, and maximize services reimbursement.

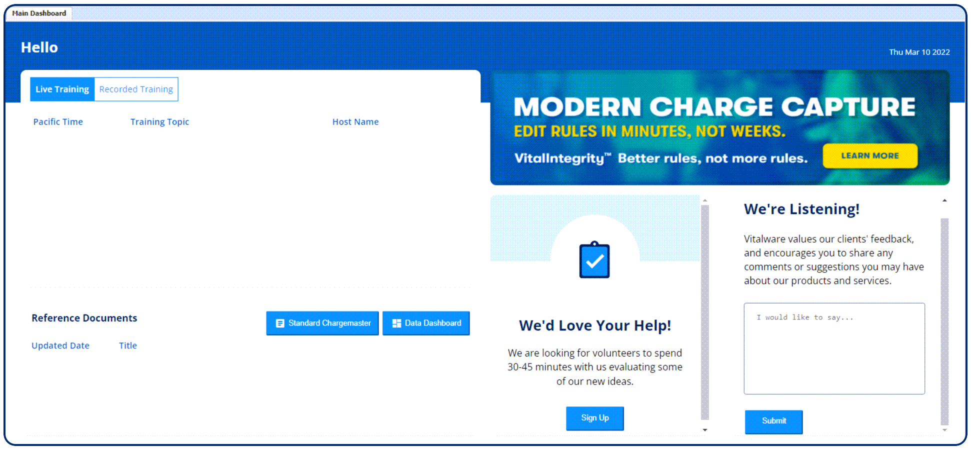
- **Supports all Health Information Systems (HIS)**: Supports all HIS vendor file formats, including McKesson, Cerner, CPSI, Allscripts, and Epic.
- **Automated Import/Analysis**: No manual intervention required for import of CDM, Pharmacy, Supply Item Master, and Utilization files.
- **Coding and Billing Analysis**: Identify coding and billing exceptions including deleted and invalid HCPCS codes, codes not recognized by OPPS, and related modifiers.
- **Request Process/Workflow**: Unique functionality makes workflow and change file management intuitive and efficient.
- **Benchmarking & Peer Group Comparison**: Provides price benchmarking based on the defined peer groups by hospital, department, and line item.
- **Complete Data Consumption**: Full visibility across departmental data by viewing all of your ancillary data files in a single module, including:
  - Pharmacy
  - Radiology
  - Cost Data
  - Pharmacy Formulary
  - Lab Supplies
  - Multiple Fee Schedules

- Preference Lists
- Order Entry Data

Signing In to Vitalware

1. Navigate to https://www.vitalware.com.
2. In the upper right corner, click **Sign in**.
3. Enter your Vitalware **Username** and **Password**, or select **Or login with External Login** if your organization uses Single Sign-On (SSO).
4. Click **Sign in** and the Vitalware main dashboard is displayed.

Vitalware Main Dashboard



From the Vitalware dashboard you can:

- Open your products
- Sign up for future live training classes
- View recorded training classes
- Find Vitalware data reference versions, effective dates, update dates, and scheduled update dates
- Download a standard chargemaster file as a reference
- Send comments or feedback to Vitalware
- Sign up for volunteer product evaluations

System Requirements

Minimum Specifications

- CPU: Intel Pentium 4+ or 1.3 GHz Pentium processor or equivalent
- RAM: 1 GB (more RAM improves review speed)
- Minimum free disk space: 1 GB
- Printing: Printer required to output report data
- Monitor: Resolution of at least 1024 x 768

Recommended Specifications

- The most recent supported version of one of the following browsers:
  - Chrome
  - Firefox
  - Microsoft Edge
- CPU: Intel i5 processor or above
- RAM: 4 | 8 GB ideal
- Monitor: 1280 x 1024 Optimal: 1920 x 1080

Chapter 2: Understanding CDM File Format

VitalCDM can be used to upload and import many types of files. The most common are General CDM and Usage, Pharmacy, Supply, and Professional CDM files. Requirements for each file type varies.

Requirements

Delimited Text: File format must be delimited text file. A delimited text file is a text file used to store data. On each line of data, fields are separated by the delimiter, typically a comma, tab, vertical bar (also referred to as pipe), or colon.

- If you are using Excel to create the delimited text file, do not format column properties such as alignment, number, etc.
- Import of Adobe Acrobat PDF and canned report .rpt file types are not supported

Date: Must be in one of the following formats:

- MM-DD-YYYY
- MM/DD/YYYY
- YYYY-MM-DD
- YYYY/MM/DD
- YYYYMMDD

Time: Must be in the following format:

- HH:MM:SS

Dates with Times: Must be in one of the following formats:

- MM-DD-YYYY HH:MM:SS
- MM/DD/YYYY HH:MM:SS
- YYYY-MM-DD HH:MM:SS
- YYYY/MM/DD HH:MM:SS
- YYYYMMDD HH:MM:SS

File Field Requirements

VitalCDM requires key fields to be present. If the fields listed below are not included within a line, that line will not be imported into VitalCDM and will be logged in the import summary email that is sent to the user importing the file.

- CDM Code (Charge Code).
- CDM Description.
- Department code, Department name, or both. Not required for Professional or Pharmacy files.
- Fields designated as part of the unique line item key.
- Fields that are defined during set up as "required."

CDM Key Fields

A *key* CDM field is a field that uniquely identifies a CDM file line item. Some examples include:

- **CDM Code (Charge Code)**: If this number is unique within a CDM file (including being unique across all facilities that may or may not be included in the CDM file) then it can be used by itself.
- **CDM, Department, or Facility code**
- **CDM Code**: Plus a custom field of any type.

Recommended Fields

VitalCDM will accommodate an unlimited number of HCPCS, revenue code, and modifier fields. Recommended fields are used in specific reports. If the fields listed below are not contained within the file, some reports will not be available.

- **Description**: If the field delimiter is used in the description, use text qualifiers such as single or double quotation marks.
- **Revenue Code**: Must be three or four characters in length.
- **CPT/HCPCS**: Must be five, seven, or nine characters in length.
- **Charge/Price**

Each charge item must contain fields that will provide a unique key code identifier for each line item. Eligible fields include Charge/Service, Department, Facility Codes, and GL Account.

- **Relative Value Units (RVU)** suggested for Professional CDM files.
- **NDC codes** suggested within Pharmacy and General CDM files that contain Pharmacy Items.

Required Usage Fields

Required Usage fields are used as a unique key code identifier.

Quantities desired in relation to specific payer types:

- Current Inpatient Quantity
- Current Outpatient Quantity
- Current Inpatient/Outpatient Quantity
- YTD Inpatient Quantity
- YTD Outpatient Quantity
- YTD Inpatient/Outpatient Quantity

In addition, the following field types are accommodated if you do not have usage broken out by payer type:

- Current Total Inpatient Quantity
- Current Total Outpatient Quantity
- Current Total Inpatient/Outpatient Quantity
- YTD Total Inpatient Quantity
- YTD Total Outpatient Quantity
- YTD Total Inpatient/Outpatient Quantity

Chapter 3: Uploading CDM Files Using FTP

FTP is an acronym for File Transfer Protocol. As the name suggests, FTP is used to upload and transfer files between computers on a network. You can upload and import CDM files into VitalCDM using an FTP client application to connect to Vitalware's secure FTP server.

FTP Client Application

Before you can upload and transfer files using FTP, you must have an FTP client application. If you do not have an FTP client application installed on your computer, contact your IT Administrator. Below are some free FTP client applications available on the web.

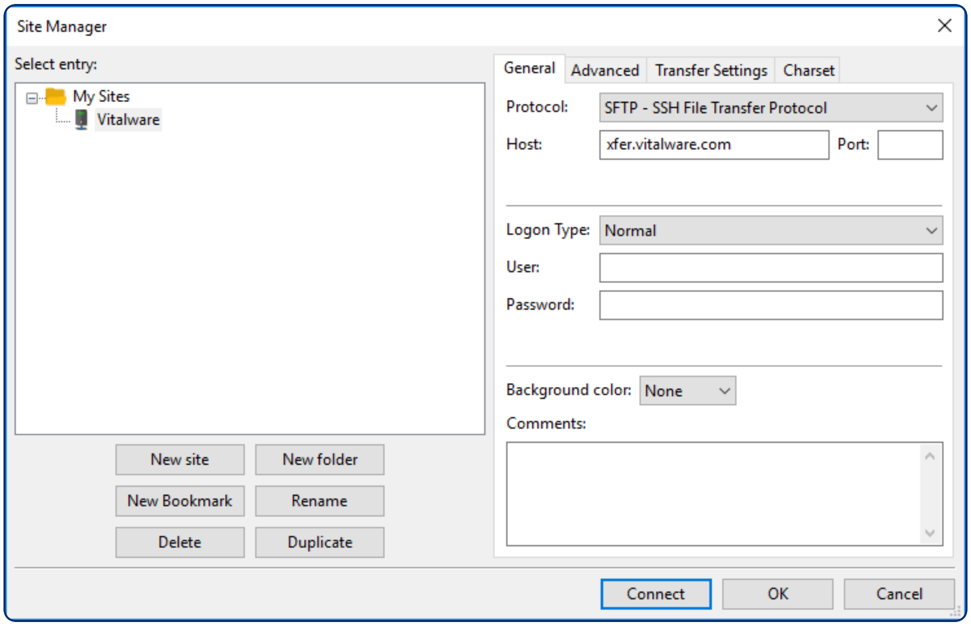
1. **FileZilla**: https://filezilla-project.org/
2. **Cyberduck**: https://cyberduck.io/
3. **FireFTP**: http://fireftp.net/
4. **Classic FTP**: http://www.nchsoftware.com/classic/
5. **WinSCP**: http://winscp.net/eng/index.php

FTP Client Configuration

The FTP client application used for this step-by-step is FileZilla.

1. Open **FileZilla** and select **File** > **Site Manager**.
2. Click **New Site** and enter **Vitalware**.
3. Enter the host name: **xfer.vitalware.com**.
4. Change the **Protocol** to **SFTP-SSH File Transfer Protocol**.
5. Change the **Logon type** to **Normal**.

6. Enter your Vitalware **Username** and **Password**.



7. Upload the file to the folder path: **\auto\CDM\<*CDM folder name*>\in**.

Note: After you have successfully connected to Vitalware's FTP server, the **auto** and **sub** folders are automatically created. If you accidentally delete or rename these folders, the folders will be automatically created again.

Chapter 4: Importing CDM Definition Files

After you have successfully connected to Vitalware's FTP server, the **auto** folder should be visible. If you have CDM enabled and CDM import definitions have been defined, the folder structure under the auto folder will include folders that represent the CDM definitions for an entity.

> **Note**: If definitions are created while you are logged in, you must disconnect and then reconnect before the new folders are visible.

Folder Structure for CDM Definitions

\auto\CDM\<chargeMasterInternalname>\	
Folder	**Purpose**
\In	• Folder location for CDM imports
\InPartial	• Folder location for **partial** CDM imports
\Out	• Folder location listing files that had errors during import as well as a log of what the errors are

> **Note**: For usage data, there is no difference between the **In** and **inPartial** folders.

After importing a file into the definition's In or InPartial folder:

- The CDM file is parsed.
- If a column definition mapping exists, it will be imported.

- If a column definition does not exist, you will receive an email notification that the definitions need to be created.

Uploading and Importing Files

Upon creating a valid definition file, pending imports will run.

Initial Definition File Upload

1. Create the **Chargemaster definition file** using X VitalAdmin.
2. Open your **FTP client** and connect to Vitalware's FTP server.
3. Upload the **CDM definition file** to the **In** folder. After the CDM file import is finished, you will receive a notification by email.

Subsequent Definition File Uploads

1. Open the **FTP client** and connect to the **Vitalware FTP server**.
2. Upload the **CDM definition file** to the respective **In** or **InPartial** folder.
3. After the CDM file import is finished, you will receive a notification by email.

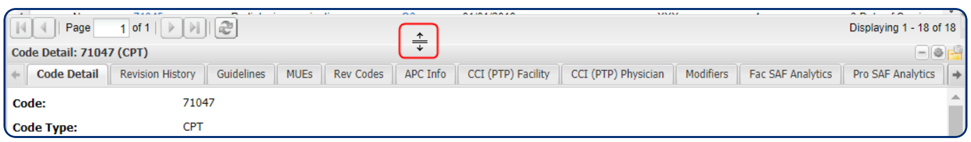
Chapter 5: Code Detail Pane

The **Code Detail** panel contains referential and payment information in separate tabs. The tabs vary depending upon the type of code selected.

Customizing the Code Detail Pane

Extending the height of the **Code Detail** pane:

Hover over the line that separates the **Code Detail** pane from the **Results** table. Click the divider icon and drag it up or down to adjust the height.



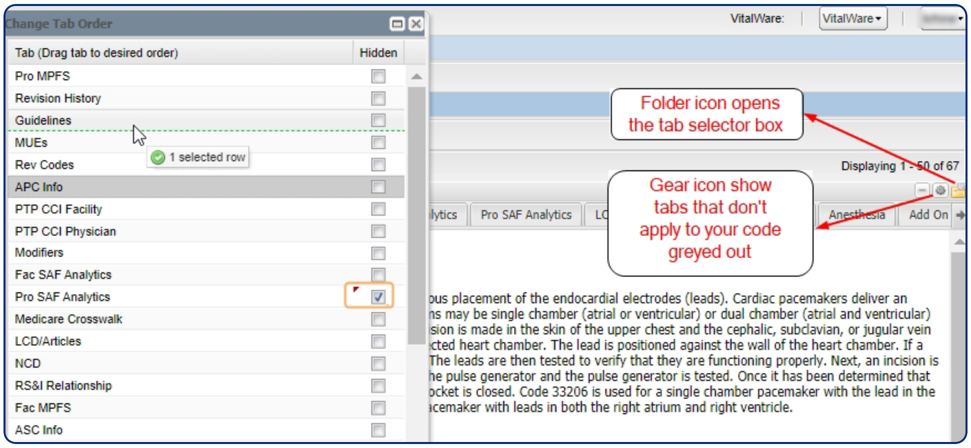
Display only the tabs you want to see and in the order you want them in:

1. Click the **folder** icon at the top of the panel.
2. In the **Change Tab Order** window, select the tabs you want to remove from your view.
3. Drag tabs in the order you want.

> **Note**: The **Change Tab Order** pop-up contains all tabs that apply to every code type. The selections you make won't apply to the codes that don't contain that information.

4. Click **Save**. The selections you make are applied until manually updated again.

View the tabs in your **Code Detail** panel that don't apply to your chosen code by clicking the **gear** icon. The hidden tabs are not available.



Understanding the Tabs in the Code Detail Pane

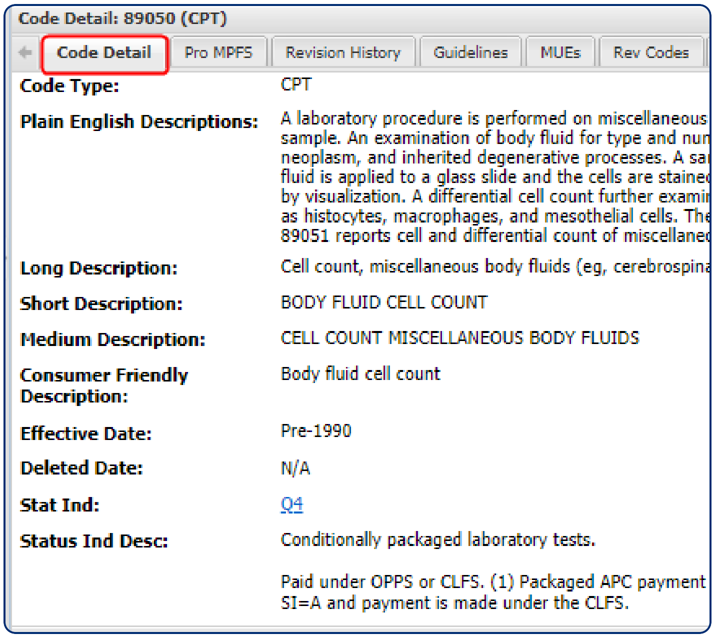
Code Detail Tab

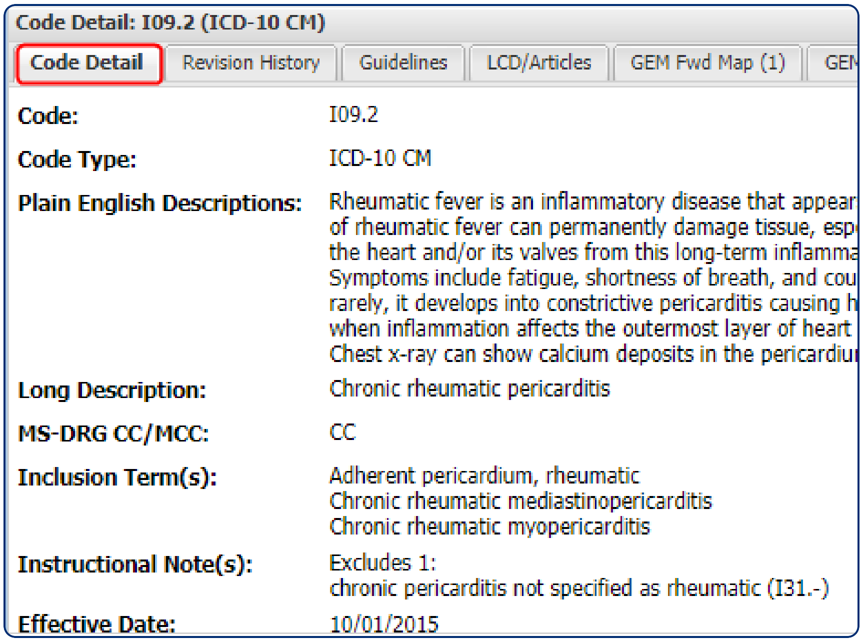
The **Code Detail** tab is visible by default and is the first tab on the left. The information it contains varies by code type.

CPT/HCPCS code details:

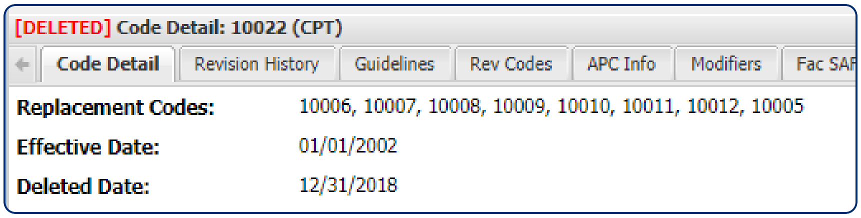
- Code Type
- Plain English Descriptions
- Long Description
- Medium Description
- Consumer Friendly Description
- Effective Date
- Deleted Date

Inclusion Terms and Instructional Notes are included on the ICD-10 CM **Code Details** tab.





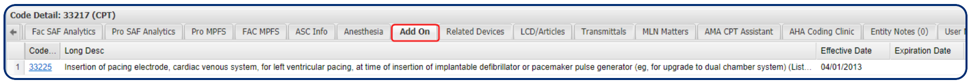
Note: All **Code Detail** tab information applies to the Date Of Service indicated in the **Search** panel. If a code is deleted as of that date, [Deleted] will display in red font and any replacement codes will be listed.



Add On Tab

The **Add On** tab shows related codes for common add on services related to the code.

Codes on this tab can be billed in conjunction with the primary code selected if add on services were provided and documented.

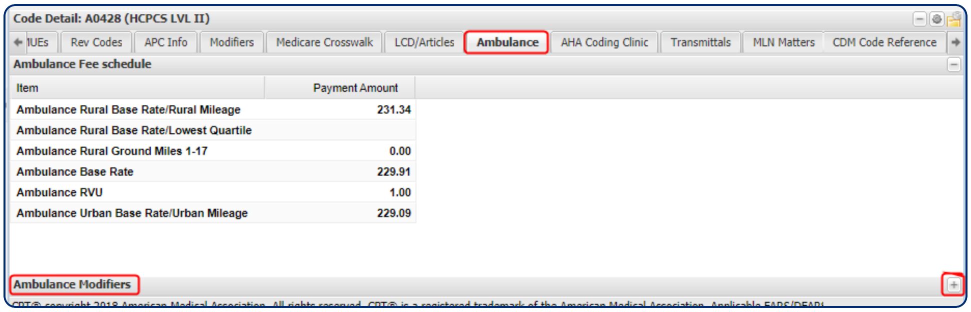


Ambulance Tab

The **Ambulance** tab includes information from the Ambulance Fee Schedule as determined by the ZIP Code of a facility.

- Ambulance Rural Base Rate/Rural Mileage
- Ambulance Rural Base Rate/Lowest Quartile
- Ambulance Rural Ground Miles 1-17
- Ambulance Base Rate
- Ambulance RVU
- Ambulance Urban Base Rate/Urban Mileage

The collapsed bar at the bottom of the tab can be expanded to display a list of all ambulance modifiers.

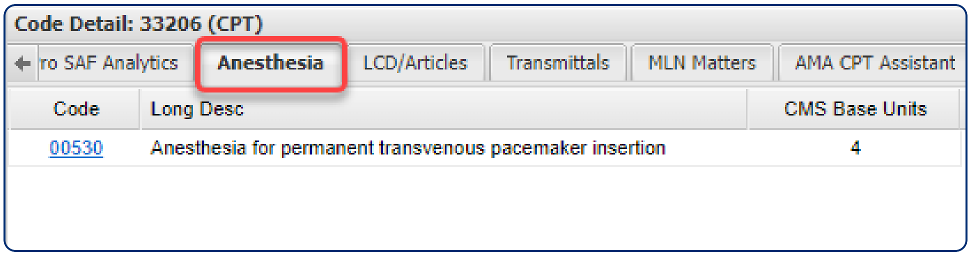


Anesthesia Tab

The **Anesthesia** tab contains anesthesia information from CMS.

Information on the tab for procedures (CPT codes) that typically require anesthesia:

- Anesthesia code appropriate for the procedure
- Primary Code - yes or no
- Long Desc
- CMS Base Units
- Conversion Factor
- Add On
- Comments
- Instructions



Information on the tab for anesthesia codes that are typically assigned to procedures.

CPT code and its description appropriate for the Anesthesia code.

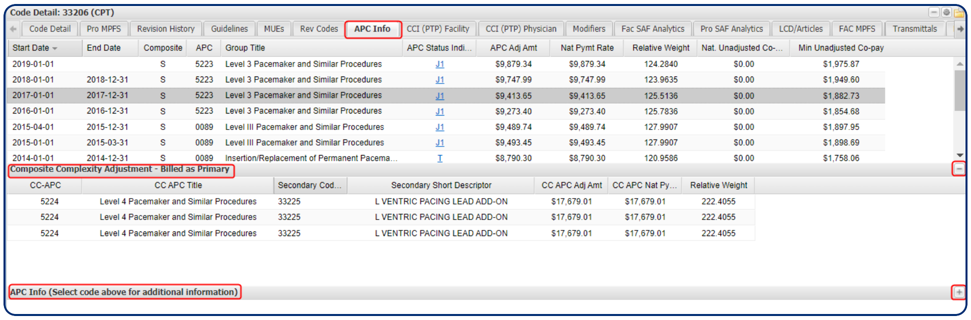
APC Info Tab

The **Medicare Ambulatory Payment Classifications (APC)** tab includes:

- APC Group Status Indicators
- National and Wage Adjusted Payment Rates
- Relative Weights and Co-pay

And two additional grids that include:

- Composite complexity adjustment when the code is billed as primary
- Secondary for codes that have complexity adjustments


Code Detail: 33206 (CPT)

Code Detail | Pro MPFS | Revision History | Guidelines | MUEs | Rev Codes | APC Info | CCI (PTP) Facility | CCI (PTP) Physician | Modifiers | Fac SAF Analytics | Pro SAF Analytics | LCD/Articles | FAC MPFS | Transmittals

Start Date	End Date	Composite	APC	Group Title	APC Status Indi...	APC Adj Amt	Nat Pymt Rate	Relative Weight	Nat. Unadjusted Co-...	Min Unadjusted Co-pay
2019-01-01		S	5223	Level 3 Pacemaker and Similar Procedures	J1	$9,879.34	$9,879.34	124.2840	$0.00	$1,975.87
2018-01-01	2018-12-31	S	5223	Level 3 Pacemaker and Similar Procedures	J1	$9,747.99	$9,747.99	123.9635	$0.00	$1,949.60
2017-01-01	2017-12-31	S	5223	Level 3 Pacemaker and Similar Procedures	J1	$9,413.65	$9,413.65	125.5136	$0.00	$1,882.73
2016-01-01	2016-12-31	S	5223	Level 3 Pacemaker and Similar Procedures	J1	$9,273.40	$9,273.40	125.7836	$0.00	$1,854.68
2015-04-01	2015-12-31	S	0089	Level III Pacemaker and Similar Procedures	J1	$9,489.74	$9,489.74	127.9907	$0.00	$1,897.95
2015-01-01	2015-03-31	S	0089	Level III Pacemaker and Similar Procedures	J1	$9,493.45	$9,493.45	127.9907	$0.00	$1,898.69
2014-01-01	2014-12-31	S	0089	Insertion/Replacement of Permanent Pacema...	T	$8,790.30	$8,790.30	120.9586	$0.00	$1,758.06

Composite Complexity Adjustment - Billed as Primary

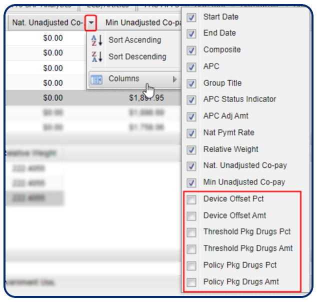
CC-APC	CC APC Title	Secondary Cod...	Secondary Short Descriptor	CC APC Adj Amt	CC APC Nat Py...	Relative Weight
5224	Level 4 Pacemaker and Similar Procedures	33225	L VENTRIC PACING LEAD ADD-ON	$17,679.01	$17,679.01	222.4055
5224	Level 4 Pacemaker and Similar Procedures	33225	L VENTRIC PACING LEAD ADD-ON	$17,679.01	$17,679.01	222.4055
5224	Level 4 Pacemaker and Similar Procedures	33225	L VENTRIC PACING LEAD ADD-ON	$17,679.01	$17,679.01	222.4055

APC Info (Select code above for additional information)

If a code can group to multiple APCs, the **APC Info** tab will display the history for all applicable APCs, with active APCs at the top.

If the CPT/HCPCS code is related to devices or drugs, additional columns can be brought in by clicking on any tab column header and choosing them.

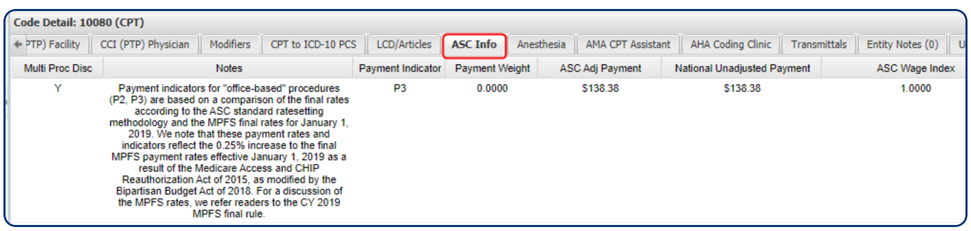
- Device Offset Percent
- Device Offset Amount
- Threshold Pkg Drugs Percent
- Policy Pkg Drugs Amount



ASC Info Tab

The **Ambulatory Surgery Center (ASC)** tab includes:

- Payment indicator
- ASC Notes
- Multi Proc Disc
- Payment weight
- ASC wage index used for the calculation
- National and adjusted payment amounts based on your facility's ASC wage index



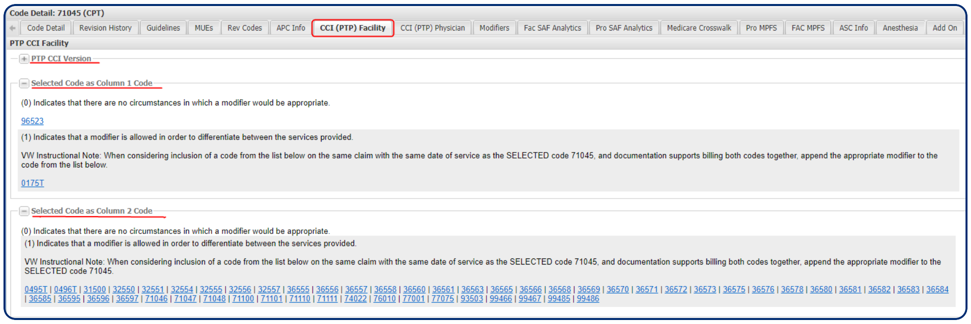
CCI (PTP) Facility Tab

The sections of the **CCI (PTP) Facility** tab contain the Correct Coding Initiative Procedure to Procedure rules related to the CPT/HCPCS code being reviewed for Facility billing.

Click the plus icon to expand the sections.

- **PTP CCI Version**: Shows the version of CCI rules based on the date of service in the Search.

- **Selected Code as Column 1 Code (0)**: Shows a list of codes that indicate there are no circumstances in which a modifier would be appropriate.
- **Selected Code as Column 1 Code (1)**: Shows a list of codes that indicate that a modifier is allowed in order to differentiate between the services provided.
- **Selected Code as Column 2 Code (0)**: Shows a list of codes that indicate there are no circumstances in which a modifier would be appropriate.
- **Selected Code as Column 2 Code (1)**: Shows a list of codes that indicate that a modifier is allowed in order to differentiate between the services provided.



CCI (PTP) Physician Tab

The sections of the **CCI (PTP) Physician** tab contain the Correct Coding Initiative Procedure to Procedure rules related to the CPT/HCPCS code being reviewed for Physician billing.

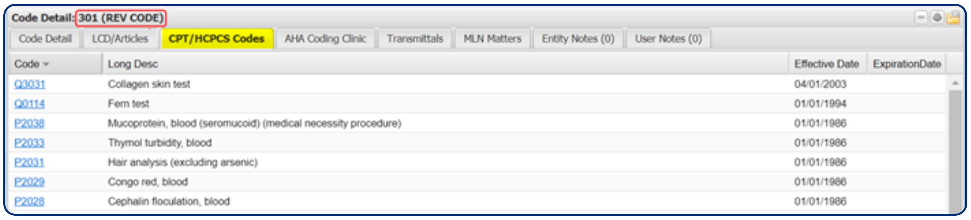
Click the plus icon ⊞ to expand the sections.

- **PTP CCI Version**: Shows the version of CCI rules based on the date of service in the Search.
- **Selected Code as Column 1 Code (0)**: Shows a list of codes that indicate there are no circumstances in which a modifier would be appropriate.

- **Selected Code as Column 1 Code (1)**: Shows a list of codes that indicate that a modifier is allowed in order to differentiate between the services provided.
- **Selected Code as Column 2 Code (0)**: Shows a list of codes that indicate there are no circumstances in which a modifier would be appropriate.
- **Selected Code as Column 2 Code (1)**: Shows a list of codes that indicate that a modifier is allowed in order to differentiate between the services provided.

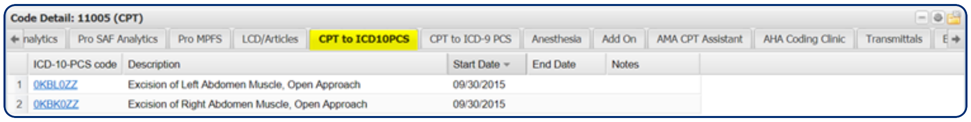
CPT/HCPCS Codes Tab

The **CPT/HCPCS Codes** tab populates only when searching the Revenue Codes data set and lists all CPT/HCPCS codes that may fall into the revenue code selected.



CPT to ICD-10-PCS Tab

The **CPT to ICD-10-PCS** tab provides a crosswalk from CPT code selected to possible ICD-10-PCS Procedure codes.



CPT to ICD-9 Px Tab (Hidden by Default)

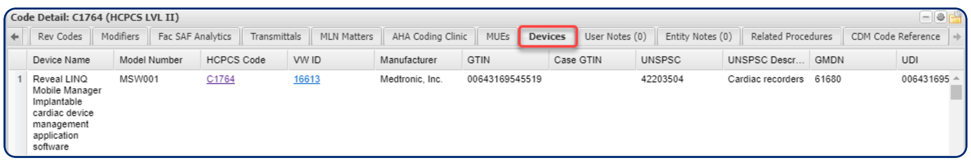
The **CPT to ICD-9-Px** tab has been replaced for most users with the **CPT to ICD-10-PCS** tab. It is hidden by default but can be revealed for a single user or an entire facility.

Contact your dedicated account manager to add this tab to your view.

Devices Tab

The **Devices** tab shows all of the devices that are mapped to the selected CPT/HCPCS code. Information includes:

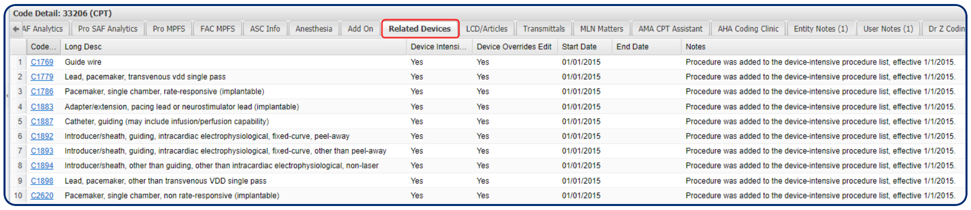
- Model Number
- UPN (if available)
- Device Name
- Manufacturer
- Manufacturer Subdivision
- CPT/HCPCS mapped
- Multiple HCPCS Device - Yes indicates that the product contains two or more devices, each with a separate HCPCS code.



Related Devices Tab

The related devices listed on a procedure **Related Devices** tab are maintained by Vitalware and based on reasonableness (for dates of service after 1/1/2015). This proprietary list does not represent any official payer claim edits in effect on or after 1/1/2015.

- Device Code and long description
- Device Intensive - yes or no
- Device Overrides Edit - yes or no
- Start and End Date of Device Code
- Notes regarding the date of service



Code Detail: 33206 (CPT)

	Code...	Long Desc	Device Intensi...	Device Overrides Edit	Start Date	End Date	Notes
1	C1769	Guide wire	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.
2	C1779	Lead, pacemaker, transvenous vdd single pass	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.
3	C1786	Pacemaker, single chamber, rate-responsive (implantable)	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.
4	C1883	Adapter/extension, pacing lead or neurostimulator lead (implantable)	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.
5	C1887	Catheter, guiding (may include infusion/perfusion capability)	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.
6	C1892	Introducer/sheath, guiding, intracardiac electrophysiological, fixed-curve, peel-away	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.
7	C1893	Introducer/sheath, guiding, intracardiac electrophysiological, fixed-curve, other than peel-away	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.
8	C1894	Introducer/sheath, other than guiding, other than intracardiac electrophysiological, non-laser	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.
9	C1898	Lead, pacemaker, other than transvenous VDD single pass	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.
10	C2620	Pacemaker, single chamber, non rate-responsive (implantable)	Yes	Yes	01/01/2015		Procedure was added to the device-intensive procedure list, effective 1/1/2015.

Dates of Service prior to 01/01/2015 have a **Device Dependent** tab and list codes that reflect the CMS procedure to device edits for the date of service used in the search.

DME Fee Sched Tab

The **Durable Medical Equipment (DME) Fee Sched** tab data includes:

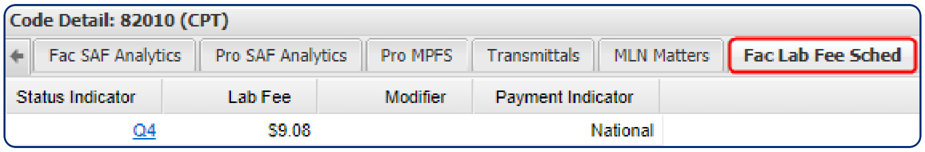
- Jurisdiction
- Category
- Payment amount based upon reported modifiers
- Floor and ceiling amounts

Code Detail: L1810 (HCPCS LVL II)

HCPCS	Mod	Mod2	Juris	Catg	Payment Amt	Ceiling Amt	Floor Amt
L1810			D	PO	$102.21	$121.91	$91.43

FAC Lab Fee Sched Tab

For dates of service on or after 1/1/2018, the FAC Lab Fee Sched tab contains the national payment amount based on the date of service indicated in the search criteria, or a local payment indicator for those codes that are priced individually by each MAC. For dates of service prior to 1/1/2018, the tab contains the locality-specific payment rates based upon the facility and the date of service indicated in the search criteria.

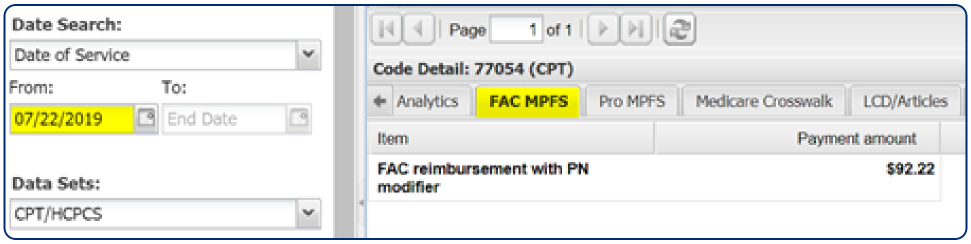


Code Detail: 82010 (CPT)

Status Indicator	Lab Fee	Modifier	Payment Indicator
Q4	$9.08		National

FAC MPFS Tab

The FAC fee schedule tab returns reimbursement information for outpatient hospital procedures that are reimbursed via fee schedule. For example, procedures performed in an off-campus, provider-based department of a hospital and reported with modifier PN are reimbursed under the MPFS.

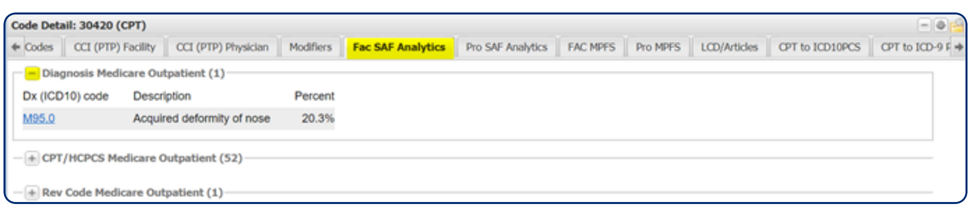


FAC SAF Analytics Tab

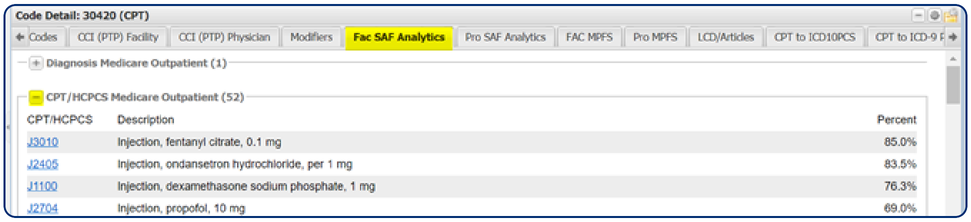
The **FAC SAF Analytics** tab (Facility Standard Analytical File) displays statistics about the code selected in relation to its use in the facility setting. The SAF file contains detailed claims information about health care services rendered to Medicare beneficiaries in the outpatient setting. Information is aggregated from the most recent four quarters of data available for CMS and is updated on a quarterly basis.

The data is separated into three sections whose default view is collapsed by default. Expand the sections by clicking on the plus icon.

1. **Diagnosis Medicare Outpatient**: Contains statistics about the ICD-10-CM codes most frequently billed with the CPT/HCPCS code being reviewed. In the example below, Medicare outpatient bills that include CPT code 30420 also included ICD-10-CM Code M95.0 20.3% of the time in the SAF data.

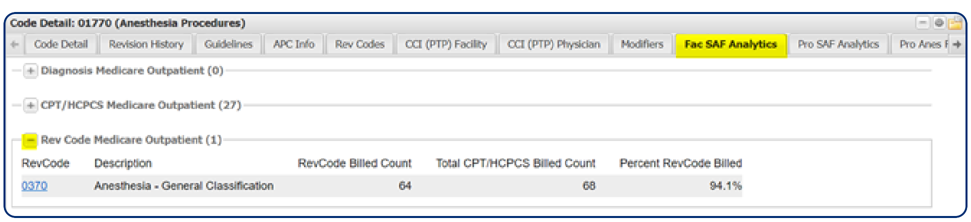


2. **CPT/HCPCS Medicare Outpatient**: Contains statistics about other CPT/HCPCS codes that are most frequently billed with the CPT/HCPCS code being reviewed.



3. **Rev Code Medicare Outpatient**:
   - **RevCode Billed Count**: The number of times the revenue code was billed with the CPT/HCPCS being reviewed based on the SAF data.
   - **Total CPT/HCPCS Billed Count**: The total number of times the CPT/HCPCS code being reviewed was billed.
   - **Percent RevCode Billed**: The percent of times that the revenue code was billed with the CPT/HCPCS being reviewed.

> **Note**: The percentage totals may not add up to 100% for the following reasons:
>
> - Code pairings less than 2% are not displayed.
> - We cannot display claims information in which fewer than 11 claims are found in the data.



GEM Fwd Map Tab

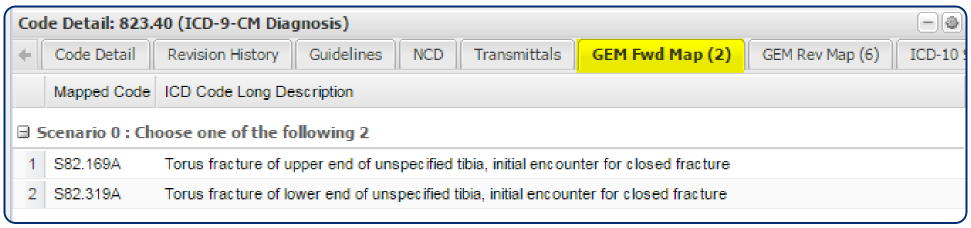
The **GEM Fwd Map** tab is visible only when searching the ICD-9 or ICD-10 data sets.

It contains the codes identified through General Equivalence Mappings (GEM) to map forward to either:

- The ICD-9 code searched on to the resulting ICD-10 codes
- The ICD-10 code searched on to the resulting ICD-9 codes

The **GEM Fwd Map** tab shows a number in parenthesis (2) indicating the number of codes that are mapped.

In the example below, ICD-9 code 823.40 is mapped to two different target ICD-10 codes.



GEM Rev Map Tab

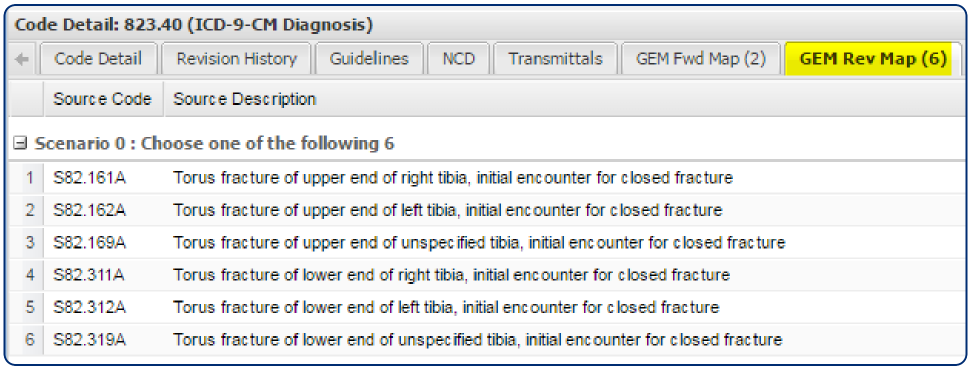
The **GEM Rev Map** tab is visible only when searching the ICD-9 or ICD-10 data sets.

It contains the codes identified through Generally Equivalency Mapping (GEM) to map in reverse to the code searched:

- The ICD-9 code searched on to the resulting ICD-10 codes
- The ICD-10 code searched on to the resulting ICD-9 codes

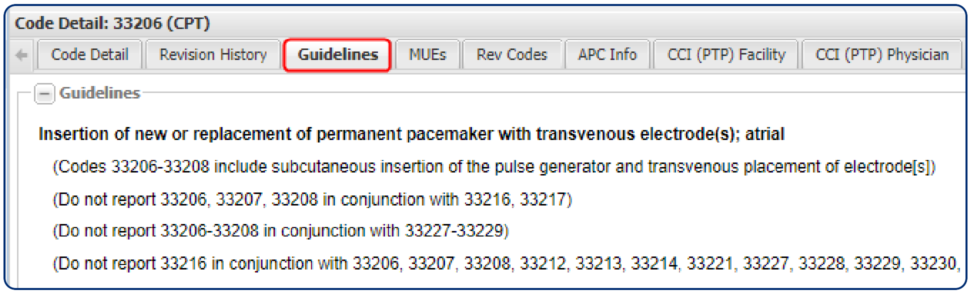
The **GEM Rev Map** tab shows a number in parenthesis (6) indicating the number of codes that are mapped.

In the example below, there are six ICD-10 codes that map to the single ICD-9 code 823.40.



Guidelines Tab

The **Guidelines** tab contains the official CPT guidelines as published by the AMA. The sections include Tabular Notes, Coding Tips, and Citations.

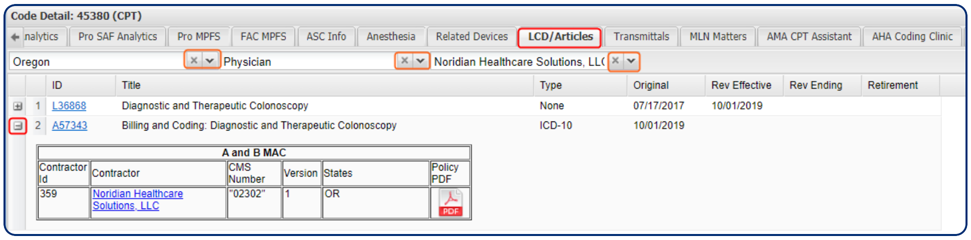


LCD/Articles Tab

- The **LCD/Articles** tab contains all Local Coverage Determinations and Articles for a particular Contractor related to the code selected.
- The tab defaults to the state and contractor set up for your facility.
- Change the state, provider type, and contractor in the drop-down fields to research LCDs and Articles related to the code from other Medicare Contractors.
- Click the **LCD** or **Article** hyperlink to open the document in a new tab.

OR

- Click the **plus** icon to access the document PDF print file option.
- The Contractor name hyperlinks direct you to the contractor's website.

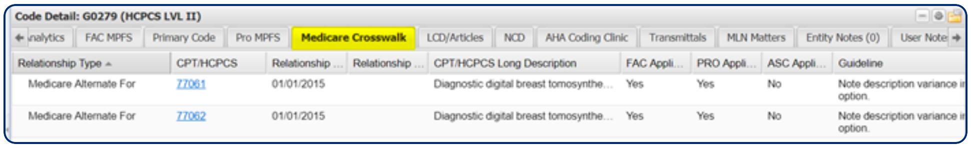


Medicare Crosswalk Tab

The **Medicare Crosswalk** tab shows CPT/HCPCS to CPT/HCPCS relationships, including Medicare Alternate, suggested replacements for deleted codes, Radiological S&I relationships, and See Also recommendations to ensure complete and accurate billing for procedures that require additional codes. It contains:

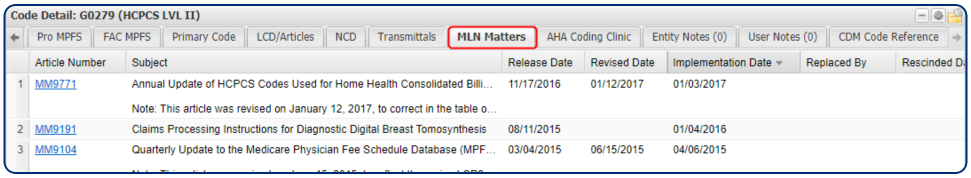
- The type of code-to-code relationships and effective dates.
- Which type of provider applies to this relationship in the fields FAC, PRO and ASC Applicable, along with guidelines.

In the example below, **G0279** is a Medicare alternate for **77061** and **77062**:

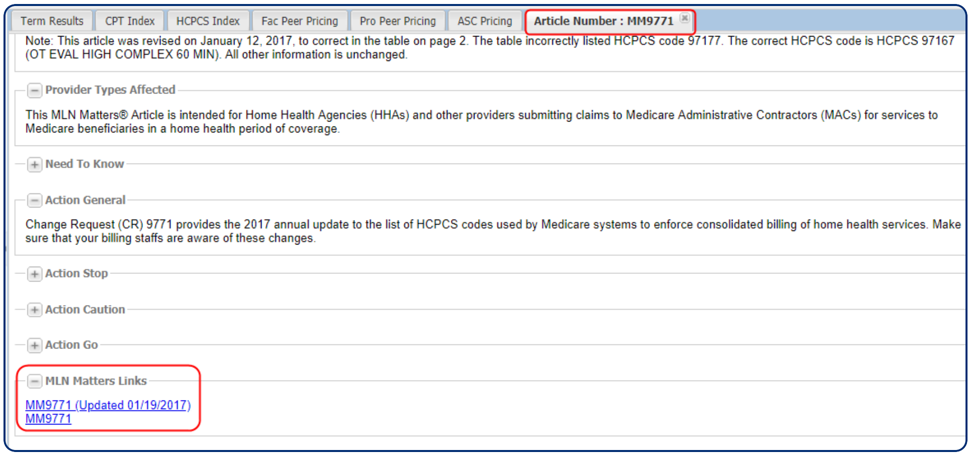


MLN Matters Tab

The **MLN Matters** tab contains links to all MedLearn Matters articles that relate to the code selected.



Click the **MLN article number** hyperlink to open it in a new tab. The new tab contains a hyperlink at the bottom to open a PDF version of the article in a new browser tab.

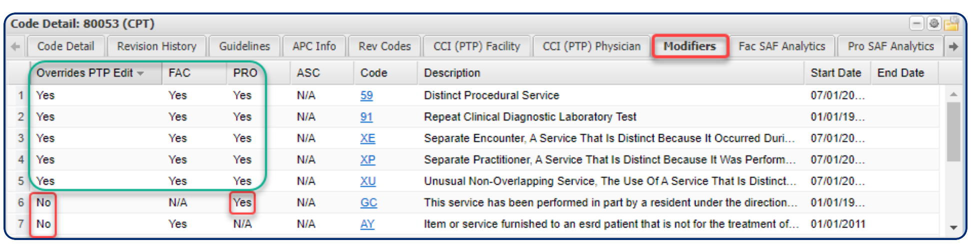


Modifiers Tab

The **Modifiers** tab includes Information on which modifiers are applicable to the selected code for the billing type; facility, professional, or ASC.

Detailed in the image below:

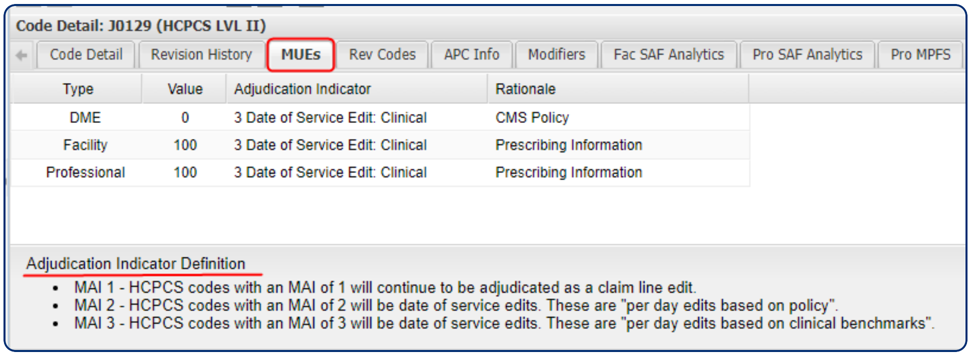
- The **Overrides PTP Edit** column that contains **Yes** means that modifiers 59, 91, XE, XP, and XU will override the NCCI edit for code 80053 for facility and professional claims. CPT code 80053 is not on the list of approved ASC procedures; therefore all modifiers are marked as N/A for the ASC setting.
- The **No** in the **Overrides PTP Edit** column indicates that the selected modifier will not override NCCI edits.
- For Modifier GC, the **Yes** under the **FAC** column means the modifier may be appropriate for some other use with CPT code 80053, but not to alleviate NCCI issues.



MUE Tab

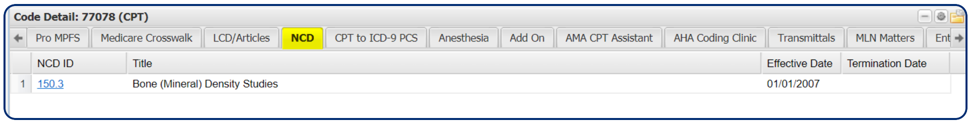
The **MUE** tab contains the Medically Unlikely Edit information for the code you selected. It includes:

- Type of MUE - DME, Facility or Professional
- MUE Value
- Adjudication Indicator
- Rationale
- Adjudication Indicator Definition

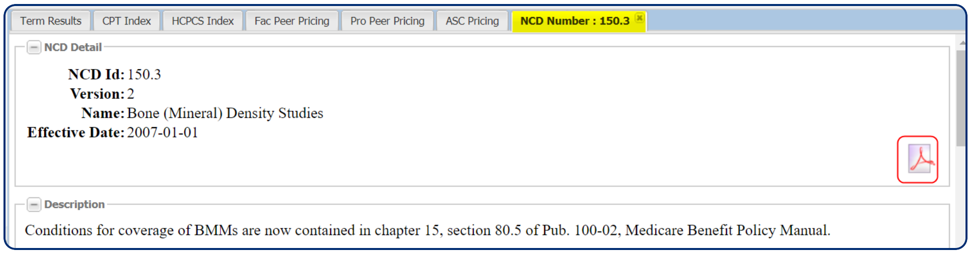


NCD Tab

The **NCD** tab contains a list of all National Coverage Determination documents that contain the code you selected.



Click the **NCD ID** hyperlink to open the document in a new tab. The new document tab contains a link to open a printable PDF version of the NCD.



NDC Tab

The **NDC** tab shows a list of **National Drug Codes** mapped to the CPT/HCPCS code selected and are generally for injectable drugs. The list is not all inclusive as many over-the-counter (OTC) drugs are not listed. The NDC number is a hyperlink that opens in a new tab at the top of the page and contains a crosswalk to the drugs assigned to it.

The default tab columns are:

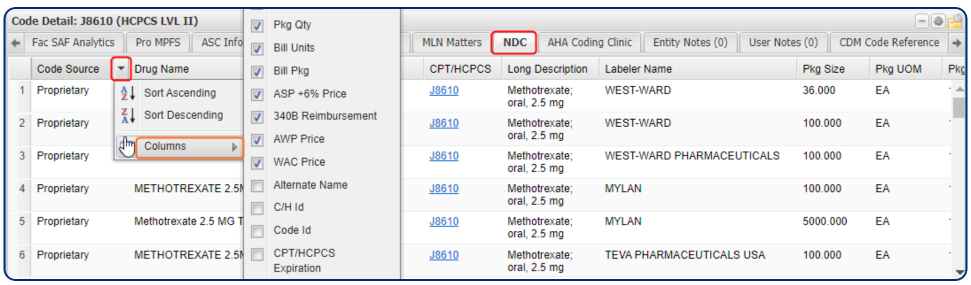
- Code Source
- Drug Name
- NDC
- CPT/HCPCS
- CPT/HCPCS Description
- Labeler Name
- Pkg Size
- Pkg UOM
- Pkg Qty
- Bill Units
- ASP +6% Price
- 340B Reimbursement
- AWP Price
- WAC Price

Click on any tab column header to pull in other applicable columns:

- Alternate Name
- C/H ID
- CPT/HCPCS Code Expiration and Description

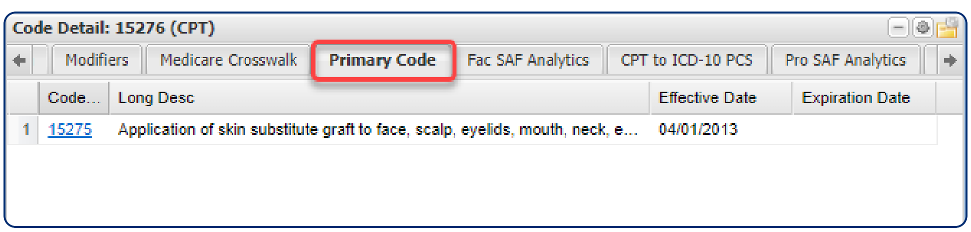
- Facility MUE
- Mfg End Date
- NDC Code Expiration
- Pharm Class
- Pro MUE
- Product Type
- ROA
- SD/MD (Single Dose/MultiDose) Per Each and per Pkg

Use the scroll bar at the bottom lower panel to view additional columns.



Primary Code Tab

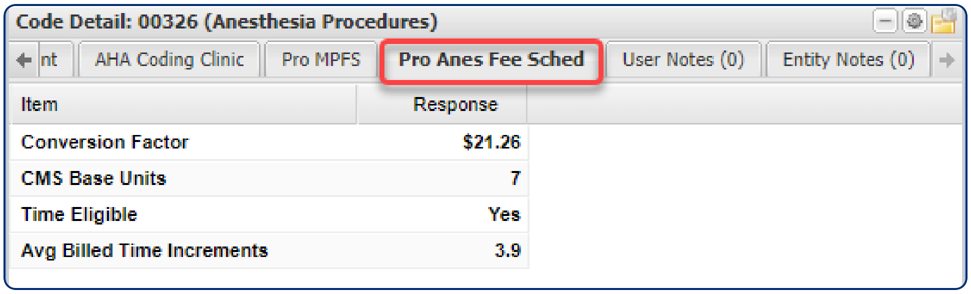
The **Primary Code** tab is visible when the code selected is considered add-on code that must be billed in conjunction with a primary code. The codes listed on the tab are eligible primary codes for the CPT code selected.



Pro Anesthesia Fee Schedule Tab

The **Pro Anesthesia Fee Schedule** tab provides helpful information for anesthesia billing.

The anesthesia conversion factor is published by CMS, and is used to compute allowable amounts for anesthesia services under CPT codes 00100 through 01999. CMS base units is the anesthesia base unit published by CMS to compute allowable amounts for anesthesia services for CPT codes 00100 through 01999. Average billed time increments represents the average billed units per CPT code calculated from the most recent four quarters of data published in the Carrier LDS Standard Analytical file.



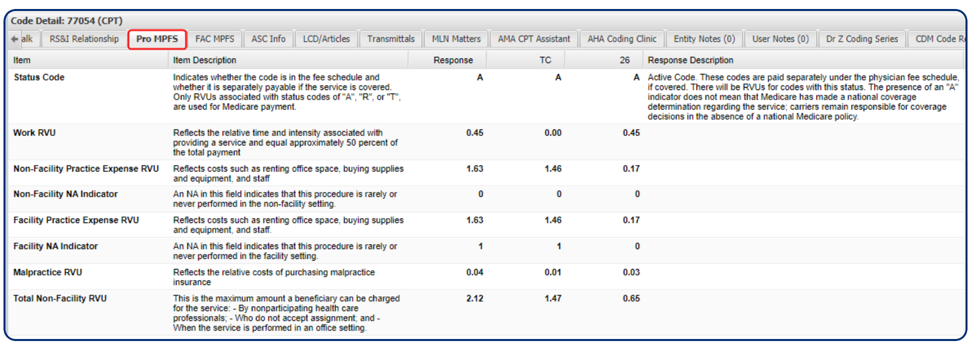
Pro MPFS Tab

The **Pro MPFS** tab includes locality-specific payment information from the Medicare Physician Fee Schedule in relation to the selected code based upon the DOS indicated that include:

- Status Code
- Work RVU (Relative Vaule Units)
- Non-Facility Practice Expense RVU
- Non-Facility NA Indicator
- Facility Practice Expense RVU
- Facility NA Indicator
- Malpractice RVU
- Total Non-Facility RVU
- Total Facility RVU
- PRO Facility Price
- PRO Office Price

- Professional-Technical Component Indicator
- Global Surgery
- Preoperative Percentage (Modifier 56, 54 and 55)
- Multiple Procedure Indicator
- Bilateral Surgery Indicator
- Assistant Surgery Indicator
- Co-Surgeon Indicator (Modifier 62 and 66)
- Endoscopic Base Codes
- Team Surgeons Indicator (Modifier 66)
- Conversion Factor
- Physician Supervision of Diagnostic Procedures
- Facility Practice Expense RVU Used for OPPS
- Non-Facility Practice Expense RVU Used for OPPS
- Malpractice RVU Used for OPPS

The **Item Description** column is hidden by default and can be added by clicking on any column header in the tab to open the column selector.

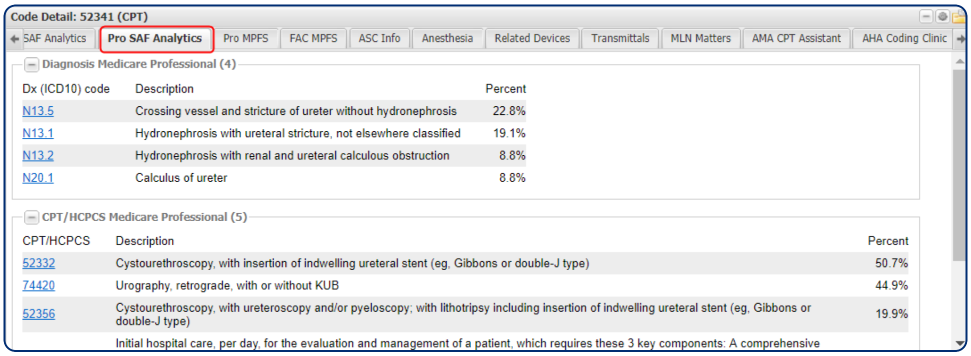


Item	Item Description	Response	TC	26	Response Description
Status Code	Indicates whether the code is in the fee schedule and whether it is separately payable if the service is covered. Only RVUs associated with status codes of "A", "R", or "T", are used for Medicare payment.	A	A	A	Active Code. These codes are paid separately under the physician fee schedule, if covered. There will be RVUs for codes with this status. The presence of an "A" indicator does not mean that Medicare has made a national coverage determination regarding the service; carriers remain responsible for coverage decisions in the absence of a national Medicare policy.
Work RVU	Reflects the relative time and intensity associated with providing a service and equal approximately 50 percent of the total payment	0.45	0.00	0.45	
Non-Facility Practice Expense RVU	Reflects costs such as renting office space, buying supplies and equipment, and staff	1.63	1.46	0.17	
Non-Facility NA Indicator	An NA in this field indicates that this procedure is rarely or never performed in the non-facility setting.	0	0	0	
Facility Practice Expense RVU	Reflects costs such as renting office space, buying supplies and equipment, and staff.	1.63	1.46	0.17	
Facility NA Indicator	An NA in this field indicates that this procedure is rarely or never performed in the facility setting.	1	1	0	
Malpractice RVU	Reflects the relative costs of purchasing malpractice insurance	0.04	0.01	0.03	
Total Non-Facility RVU	This is the maximum amount a beneficiary can be charged for the service: - By nonparticipating health care professionals; - Who do not accept assignment; and - When the service is performed in an office setting.	2.12	1.47	0.65	

Pro SAF Analytics Tab

The **Pro SAF Analytics** tab (Professional Standard Analytical File) displays statistics about the code selected in relation to its use in the professional setting. The SAF file contains detailed claims information about health care services rendered to Medicare beneficiaries. Each file contains one year of claims information and the SAF is released bi-yearly. The data is separated into two sections. Expand the sections by clicking on the plus ⊞ icon.

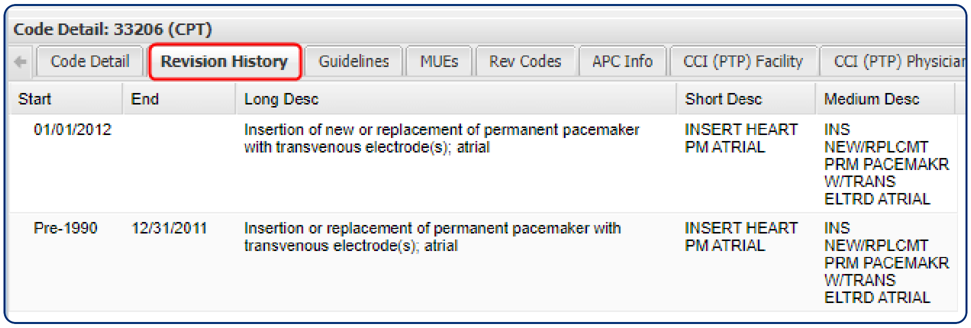
- **Diagnosis Medicare Outpatient**: contains statistics about the ICD-10-Dx codes most frequently billed with the CPT/HCPCS code being reviewed.
- **CPT/HCPCS Medicare Professional**: contains statistics about other CPT/HCPCS codes that are most frequently billed with the CPT/HCPCS code being reviewed.



Tip: The percentage totals may not add up to 100%, because code pairings less than 2% are not displayed.

Revision History Tab

The code **Revision History** is listed from newest to oldest in a stacked view.

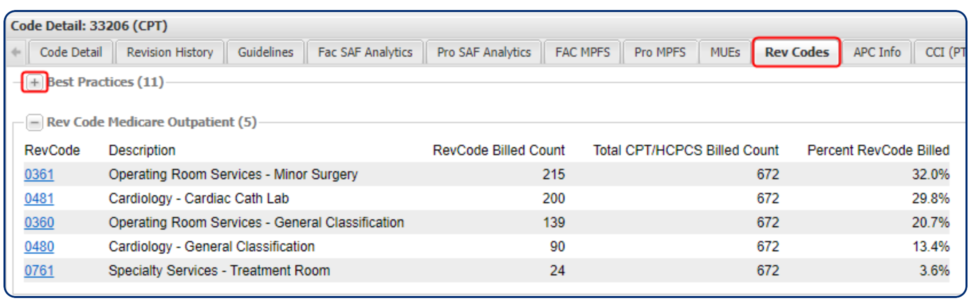


Rev Codes Tab

The **Rev Codes** tab includes two lists of revenue codes that might be appropriate for the CPT/HCPCS code being reviewed.

- **Best Practices**: Provides a list of the revenue codes that Vitalware has determined are most suitable for the code selected. In most standard-use cases, the appropriate revenue code will be listed here. There are some unusual cases in which facilities may find that their specific use calls for a revenue code that is not listed here.
- **Rev Code Medicare Outpatient**: Provides the following:
  - **RevCode Billed Count** represents the number of times the revenue code was billed with the CPT/HCPCScode based on the SAF data.
  - **Total CPT/HCPCS Billed Count** represents the total number of times the CPT/HCPCS code being reviewed was billed.
  - **Percent Rev Code Billed** is the percent of times that the revenue code was billed with the CPT/HCPCS being reviewed. The percentage totals may not all add to 100% as code pairings less than 2% are not displayed.

Both of the revenue code lists can be expanded by clicking the **plus** icon.


Code Detail: 33206 (CPT)

Code Detail | Revision History | Guidelines | Fac SAF Analytics | Pro SAF Analytics | FAC MPFS | Pro MPFS | MUEs | Rev Codes | APC Info | CCI (PT

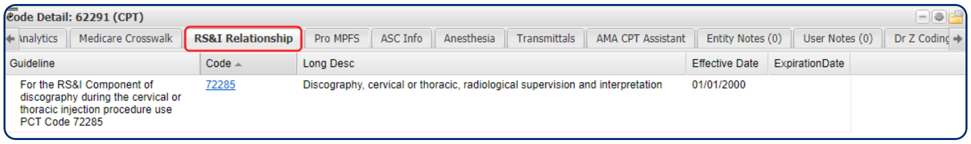
Best Practices (11)

Rev Code Medicare Outpatient (5)

RevCode	Description	RevCode Billed Count	Total CPT/HCPCS Billed Count	Percent RevCode Billed
0361	Operating Room Services - Minor Surgery	215	672	32.0%
0481	Cardiology - Cardiac Cath Lab	200	672	29.8%
0360	Operating Room Services - General Classification	139	672	20.7%
0480	Cardiology - General Classification	90	672	13.4%
0761	Specialty Services - Treatment Room	24	672	3.6%

RS & I Relationship Tab

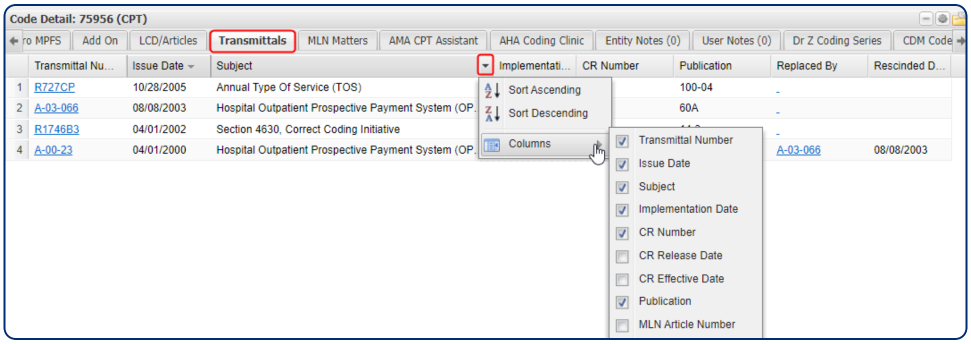
The **RS&I Relationship** tab (Radiological Supervision and Interpretation Relationship) contains related RS&I codes when the code selected is a procedure which typically utilizes separately reportable radiological guidance or requires a separately reportable radiological supervision and interpretation code for complete reporting.



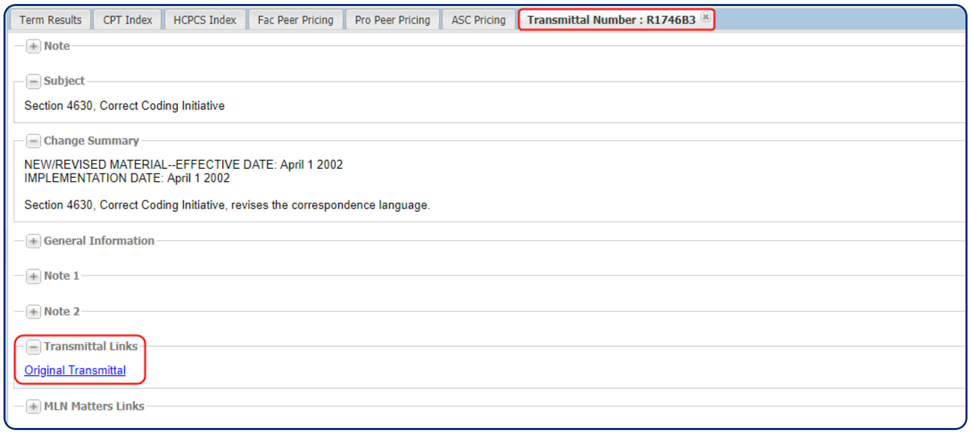
Transmittals Tab

The **Transmittals** tab contains all transmittals that are related to the code selected.

Click on any column header to add the related MLN Matters Number, CR Release, or Effective Date.



Click the **Transmittal** hyperlink to open the document in a new tab. The new tab contains a hyperlink at the bottom to open a PDF version of the article in a new browser tab.



Chapter 6: Using Coding and Billing Analysis

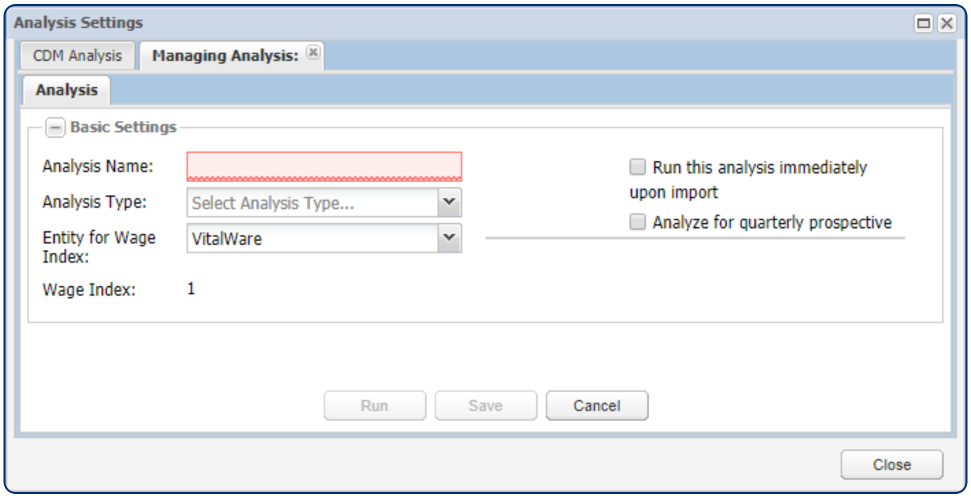
VitalCDM's Coding and Billing Analysis helps you to identify exceptions such as deleted and invalid HCPCS codes, modifiers, or codes not recognized by the OPPS (Outpatient Prospective Payment System). You can also compare coding and billing data with peer hospitals using the Standard Analytical File (SAF) Peer Data Analysis.

Analysis Definition File

An analysis definition file must be created to designate which fields to use in the analysis process. Organizations have access to run, view, and manage analyses.

Creating a New Analysis

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Analysis Details**. A new window **Analysis Settings** displays.
3. Select the appropriate entity and CDM file from the menus in the upper right corner.
4. Select **Action** > **New Analysis Definition**. The **Managing Analysis** tab displays.

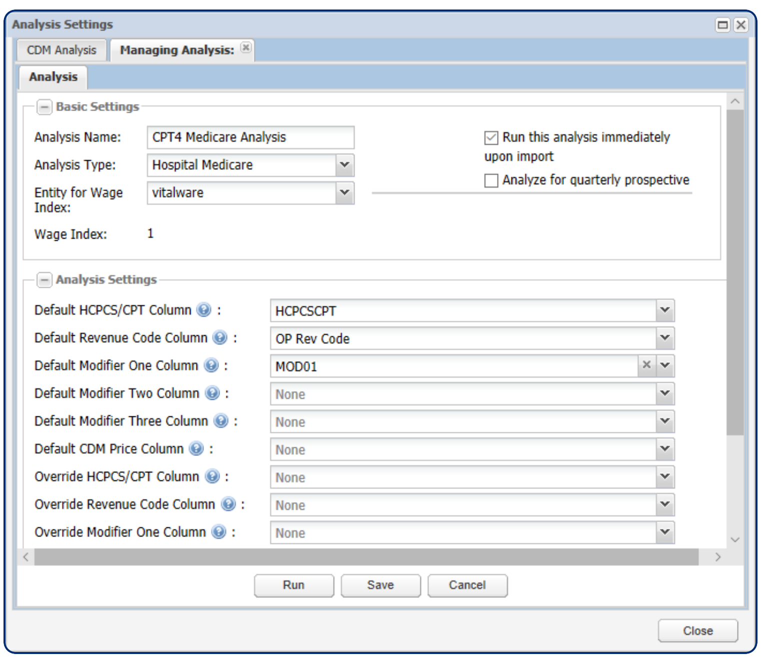


5. Complete the following, as necessary:
    - **Analysis Name**: The name to describe a specific report type. Each analysis is available as a report filter such as CPT/HCPCS, Medicare, All Other Payers, or Prospective Analysis.
    - **Analysis Type**: From the drop down menu, select the **Analysis Type**. When the **Analysis Type** is selected, choose the fields that will be analyzed from the CDM file.
    - **Entity for Wage Index**: Displays facility settings set by your organization's account manager.
    - **Run this analysis immediately upon import**: Automatically triggers the analysis upon import of new CDM file.
    - **Analyze for quarterly prospective**: As information becomes available for future rules, you can analyze the CDM file against information for the future versus the current rules. If an organization has a single CDM file for multiple hospitals, the analysis can be set to refer to a single hospital's settings. This will impact **Wage Index and Locality** reports.

Note: After an analysis date passes, the date will automatically update for the next quarter.

6. In the **Analysis Settings** section, click each drop down menu to make your selections for each default column. Selecting the default fields determines which fields are included in the analysis. Columns are populated based on the fields identified during the CDM file definition process. If an expected field is missing, contact your Vitalware account manager for further assistance.
7. The ability to override column defaults can be configured by providing override fields.

Example: There are two HCPCS columns: a default column, and a Medicare column. Because the Medicare field is not always populated, you can set the Medicare field as the override field. If the Medicare code is blank, this will fall back to the default field.



8. After your make your selections, click **Run** or **Save**.

Analysis Settings Tabs

If you select the **Hospital Medicare** Analysis Type, two additional tabs appear after you click **Save**: **SAF Peer Data Analysis** and **Pricing Analysis**.

SAF Peer Data Analysis

You can analyze the price field in the CDM file against the price published in the Standard Analytical File (SAF) for up to 20 different user-defined hospitals.

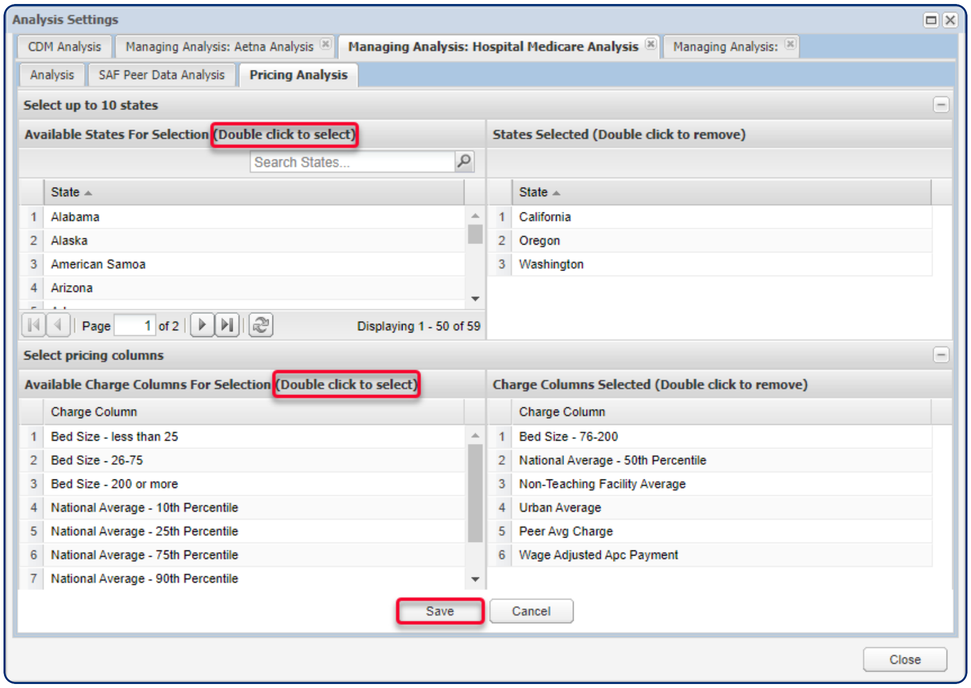
- An inflation multiplier can be added to increase the published prices for each CPT/HCPCS in the SAF data.
- If a specific hospital did not submit a particular code to CMS enough times to meet the minimum threshold, it will display "0" for the price of that CPT/HCPCS.
- If a CPT/HCPCS code has not been submitted to CMS (and paid), no data will be available.

1. Select the **SAF Peer Data Analysis** tab. Click the drop down menu next to the magnifying glass and select the search method for specific hospitals.
2. When the list of hospitals appears in the **Available Hospitals** section, double click on the line item to move it to the **Hospitals Selected** section.
3. To remove a hospital from the **Hospitals Selected** section, double click on the line item and it will move to the **Available Hospitals** section. A value can be added to the **Inflation Multiplier** field to increase the published price by that specific percentage (for example, 3.5).
4. Click **Save** to save your selections for use every time this analysis is performed.

Pricing Analysis

You can include specific information in the **Pricing Analysis** report. The data elements here will display for each specific **CPT/HCPCS** listed in the **CDM** file if they are included in the **SAF** data published by **CMS**. If a **CPT/HCPCS** code has not been submitted to **CMS** (and paid), no data will be available.

1. Select the **Pricing Analysis** tab. You can search for a specific state in the text field next to the magnifying glass.
2. Double click the line item in the **Available States** section, then double click the line item to move it to the **States Selected**. You can also select multiple states.
3. Select the options you want from the **Available Charge Columns** by double clicking on the line item to move it to the **Charge Columns Selected** section.
4. Remove options you no longer need from the **Charge Columns Selected** section by double clicking on the line item to move it to the **Available Charge Columns** section.
5. Click **Save** to save these selections for use each time the **CDM** file is analyzed.



Manually Running an Analysis

Follow the steps below to run an analysis manually without importing a new file.

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Analysis Details**. A new window named **Analysis Settings** displays with the **CDM Analysis** tab visible.
3. Select the appropriate **Facility** and **CDM** file from the drop down list in the upper right corner.
4. To run, right-click on the **Analysis** and click **Run Analysis**.
5. Click **OK** to run the analysis.

Setting an Analysis as Inactive

If you are a CDM Administrator, you can set an analysis as inactive if it is no longer needed.

To set an analysis as inactive, do the following:

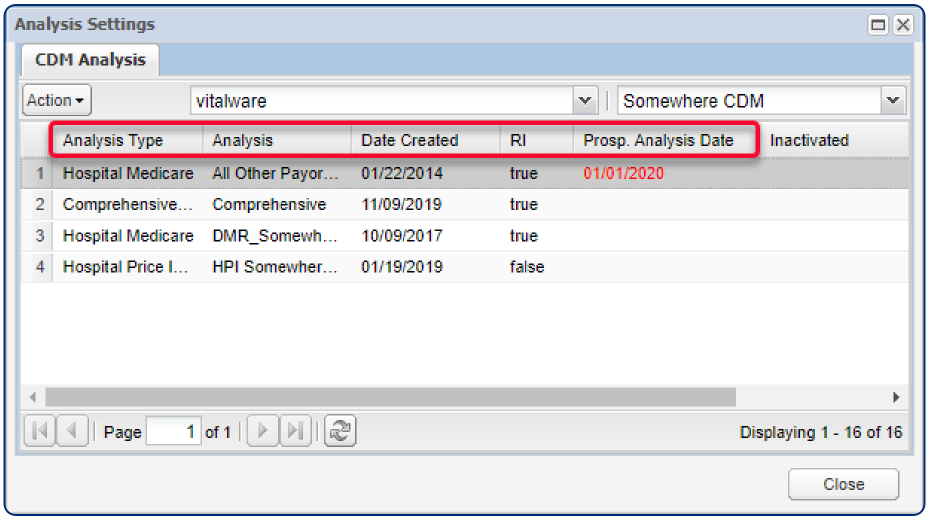
1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Analysis Details**. A new window named **Analysis Settings** displays with the **CDM Analysis** tab visible.
3. Select the appropriate **Facility** and **CDM** file from the list in the upper right corner.
4. Right-click the **Analysis** you want to edit and select **Inactivate Analysis**.

Managing Analysis

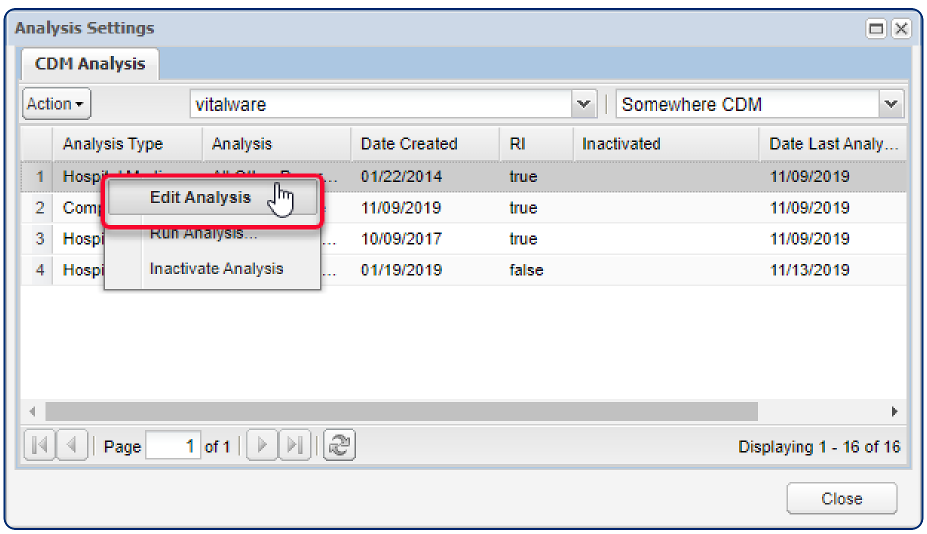
Analyzing and effectively managing your CDM and associated files is critical to generating valid and meaningful report results that are actionable.

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Analysis Details**. A new window named **Analysis Settings** displays with the **CDM Analysis** tab visible.
3. Select the appropriate **Facility** and **CDM file** from the drop down menu in upper right corner.
4. On the screen you can view the **Analysis Settings** that are currently saved for the selected Facility and CDM file. This allows you to review the following:
    - Analysis Name
    - Created By
    - Date Created
    - RI (run on import) will be **true** if **Run this analysis immediately upon import** is selected. It will be **false** if not.
    - Prospective Analysis Date will show the date entered if **Analyze for quarterly prospective** is selected, and will be blank if not. This date

will determine the set of data utilized for the analysis and reports.



5. To edit the analysis settings, right-click the analysis and select **Edit Analysis**.



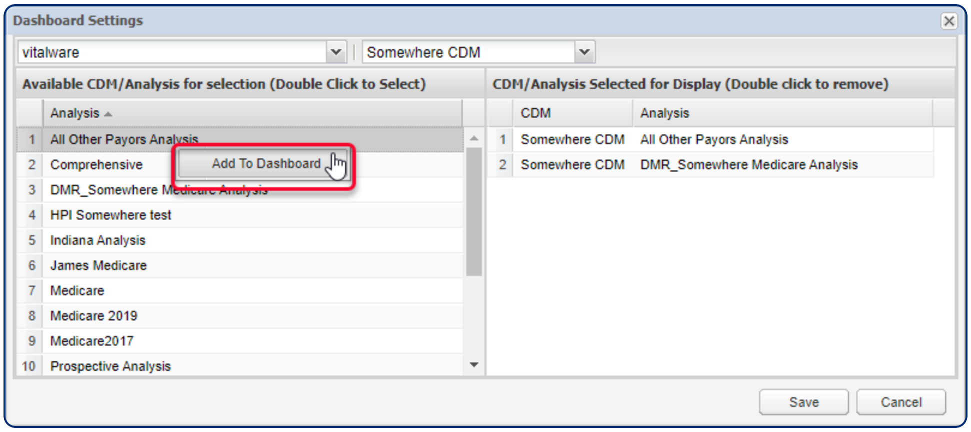
Managing the Analysis Display on Your Dashboard

You can leverage your existing analyses to customize your Dashboard to include creating views of selected charts, graphs and related details. By default, the Dashboard tab is blank until you configure your personal settings.

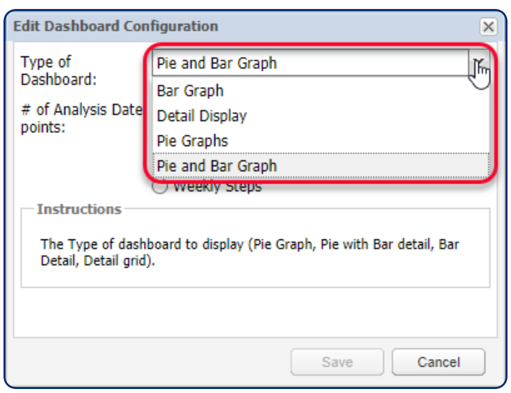
1. Click **Settings** in the **Dashboard** tab. A pop-up window will appear enabling you to search for and select **Entities**, **CDM files**, and relevant

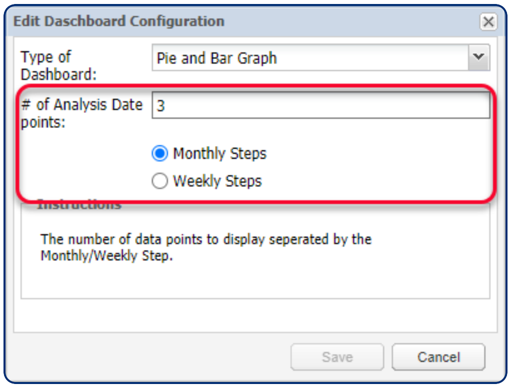
analyses to view.

2. To select the analyses, right-click to move selected items to the right side of the window. You can select multiple combinations and output for each will be visible in separate tabs.

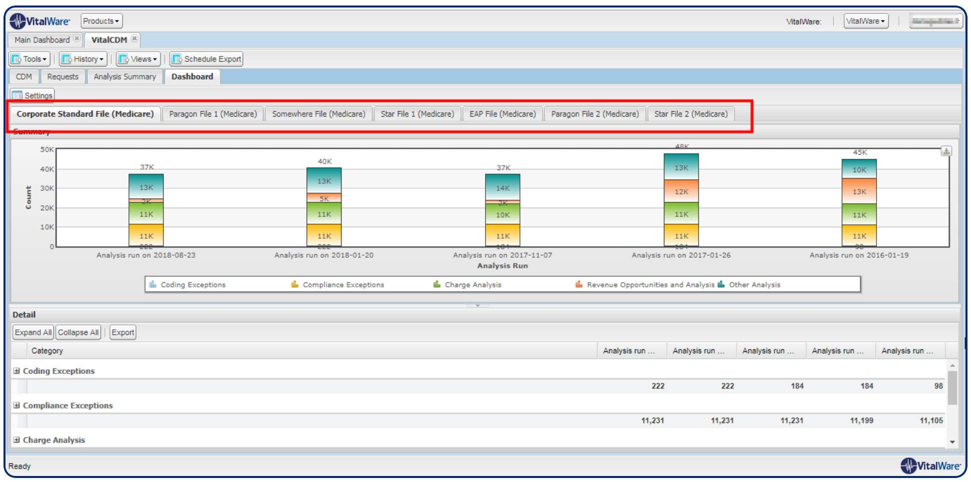


Once analyses are moved to the right side of the screen, right-click to edit the **Dashboard** settings. The default setting is **Pie and Bar Graph** for three monthly analyses. Each month, the latest analysis can be viewed. You can also view pie charts, bar graphs and detail displays. You can select up to three data points to view - either monthly or weekly based analysis points.

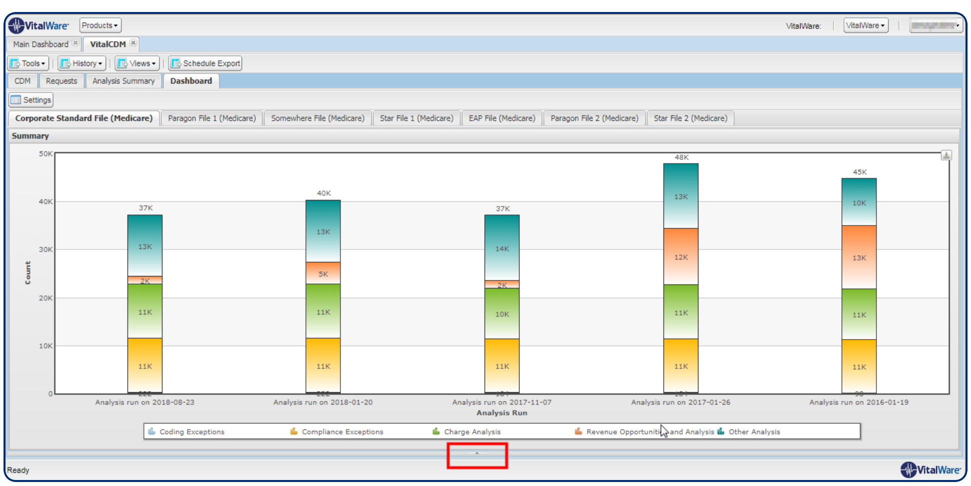




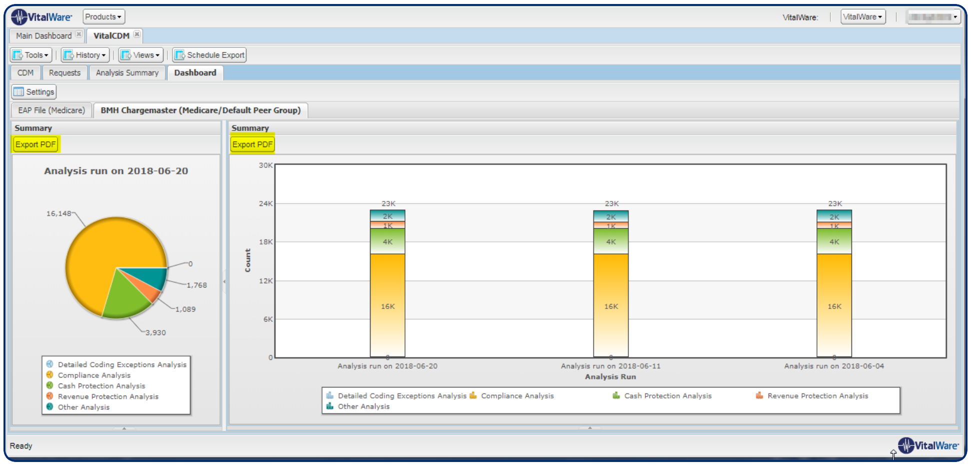
Once dashboard settings have been saved, each separate analysis configuration is viewable in a separate tab for review.



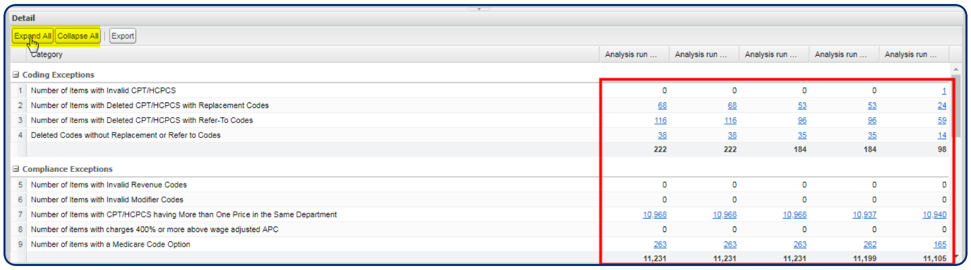
There is a caret at the bottom of the upper chart to collapse the chart view to organize the interface to provide more screen real estate to read and view more details.



You can export charts to Adobe Acrobat PDF file format by clicking **Export PDF**.



- In the **Details** section, you can expand categories to see line item details.
- You can collapse categories if you need more screen area.
- Clicking on the count number of the line item enables you to drill down into linked data.



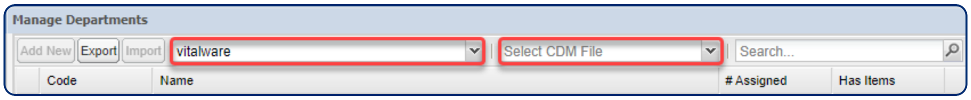
Chapter 7: Managing Departments and Cost

To manage departments and cost centers, you must be a member of the CDM Admin role. You can assign users to specific departments to restrict their views to the specific information they have access rights to view. One or more departments can also be assigned to individual users.

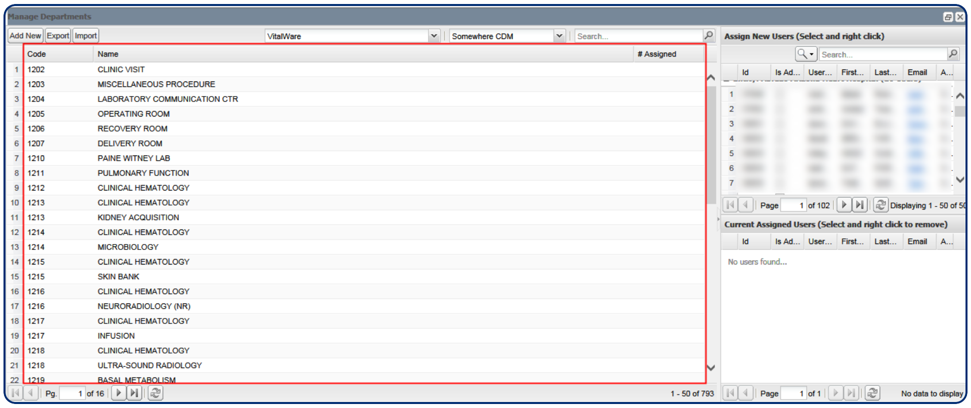
Viewing Departments and Cost Centers

If you have **CDM Admin** rights, you can view department and cost center information in a CDM file.

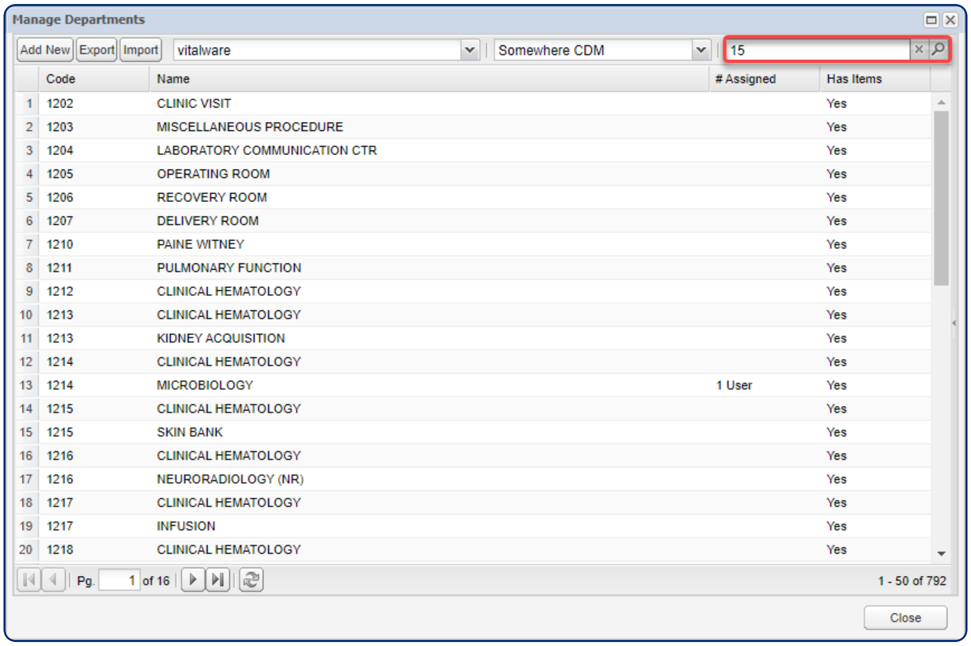
1. Select **Tools** > **Manage Departments**.
2. The **Manage Departments** window is expandable to full screen and each section is expandable by hovering over the table lines and then dragging to the target location.
3. To view department/cost center information included in the CDM file, select **Facility** and the **CDM file** in the upper left drop-down menu.



The department/cost center information is populated in the table.



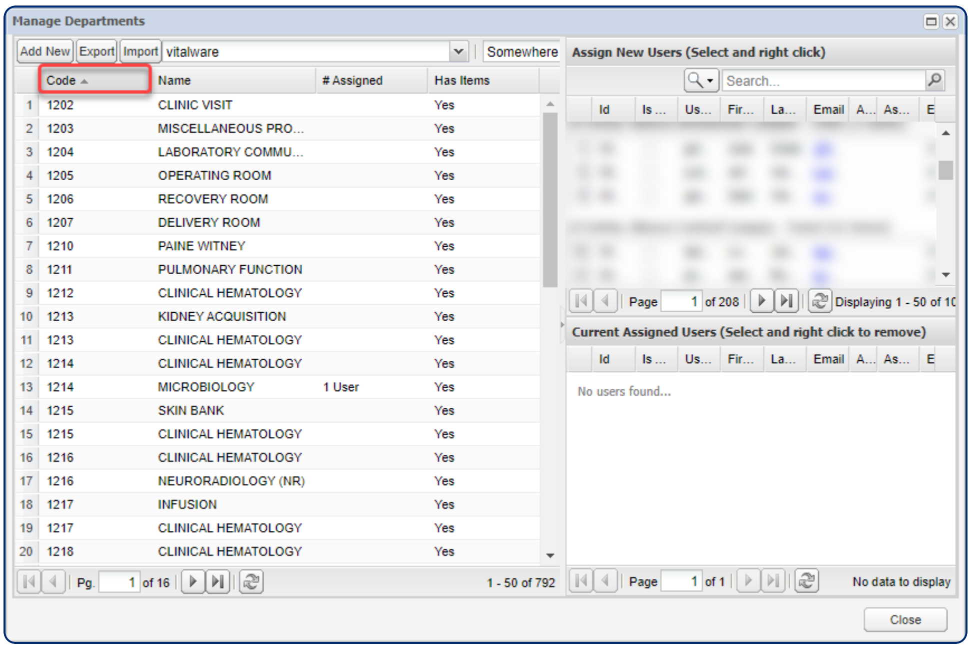
- To search for a specific department/cost center, use **Search** in the top right of the main panel. Full or partial codes and words can be used to build a refined search query to narrow down the list of topics returned.
- Clicking the **X** in the search box will clear the search criteria and revert to the original/entire department/cost center listing.



Adding Departments and Cost Centers

Required: To add or update department or cost center information to an existing department or cost center included in the imported CDM file, you must be a member of the **CDM Admin**role perin order to add department and cost center information to existing department and cost centers included in the imported CDM file.

1. Select **Tools** > **Manage Departments**.
2. At the top left corner of the department/cost center screen, select **Add New**.
3. Enter the new **Department/cost center code** and **Name**. The new department/cost center is visible in the table and sorted in numeric order. To resort the table in alphabetical order, click the column header row and the table is automatically refreshed.



Editing Existing Departments and Cost Centers

Required: Before you can edit a department or cost center in a CDM file, you must have **CDM Admin** role permissions.

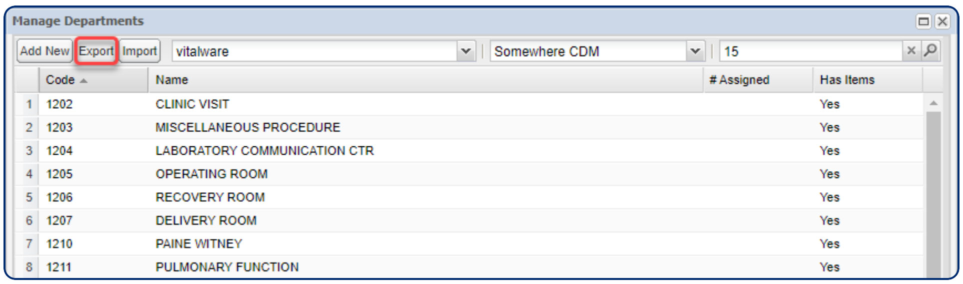
1. Click **Tools** > **Manage Departments**.
2. Right click on the **Department** or **Cost Center** you want to edit.
3. Click **Edit Department**.

4. Change the **Department Code** and **Department Name**.
5. Click **Save**.

Importing Departments and Cost Centers

Required: To import department/cost center names, you must have CDM Admin permissions.

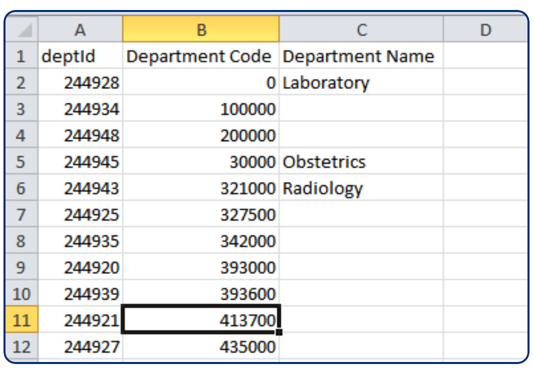
1. Select **Tools** > **Manage Departments.**
2. Click **Export** to export a template you can use for new and updated department/cost center names.



Manage Departments

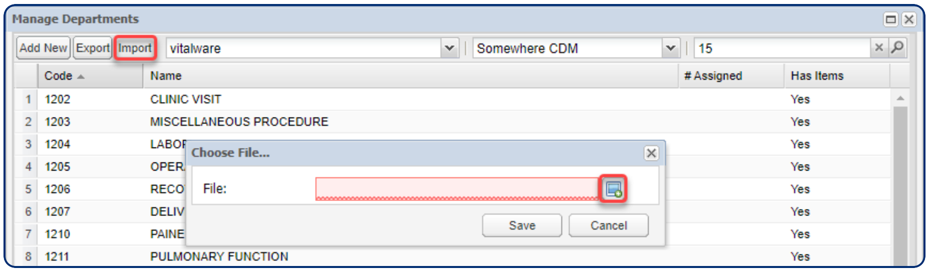
	Code	Name	# Assigned	Has Items
1	1202	CLINIC VISIT		Yes
2	1203	MISCELLANEOUS PROCEDURE		Yes
3	1204	LABORATORY COMMUNICATION CTR		Yes
4	1205	OPERATING ROOM		Yes
5	1206	RECOVERY ROOM		Yes
6	1207	DELIVERY ROOM		Yes
7	1210	PAINE WITNEY		Yes
8	1211	PULMONARY FUNCTION		Yes

- Templates can be exported to a .csv (comma separated value) file format. You can easily edit the .csv file using Microsoft Excel.



	A	B	C	D
1	deptId	Department Code	Department Name	
2	244928	0	Laboratory	
3	244934	100000		
4	244948	200000		
5	244945	30000	Obstetrics	
6	244943	321000	Radiology	
7	244925	327500		
8	244935	342000		
9	244920	393000		
10	244939	393600		
11	244921	413700		
12	244927	435000		

3. The edited file can be imported back into VitalCDM to apply the changes.



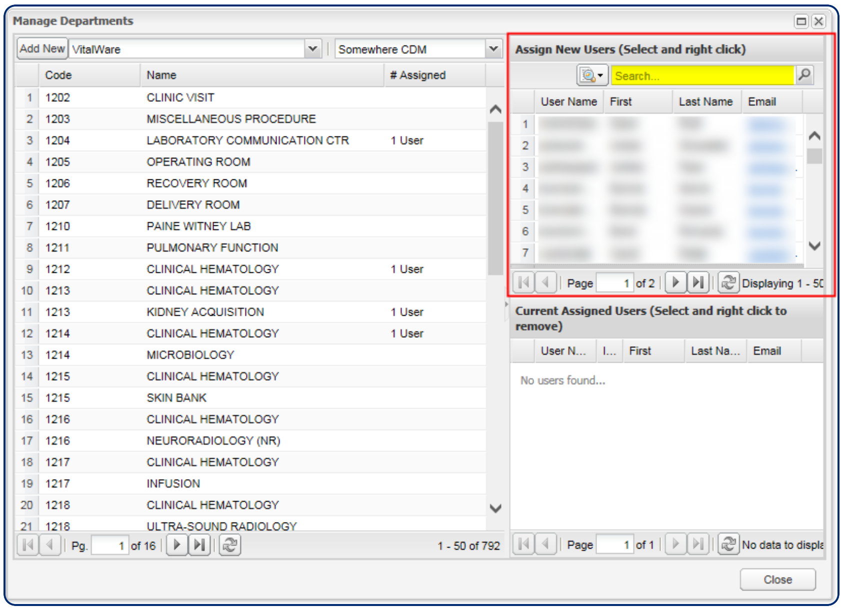
Managing Department Access

Users who are assigned **CDM Admin** permissions have the ability to manage and set department access. To request additional access, contact your assigned Vitalware account manager or your organization's designated Vitalware administrator. VitalCDM users who have been assigned to specific departments will only see those departments when searching. If they have workflow access, they can only view departments that are available within the workflow.

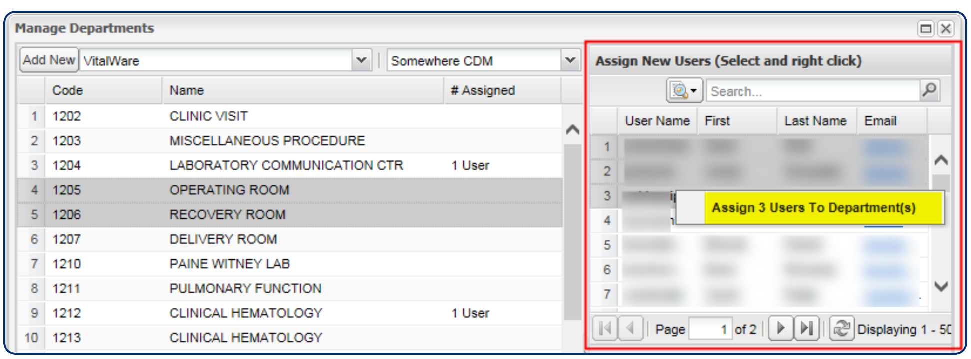
Assigning Department Access

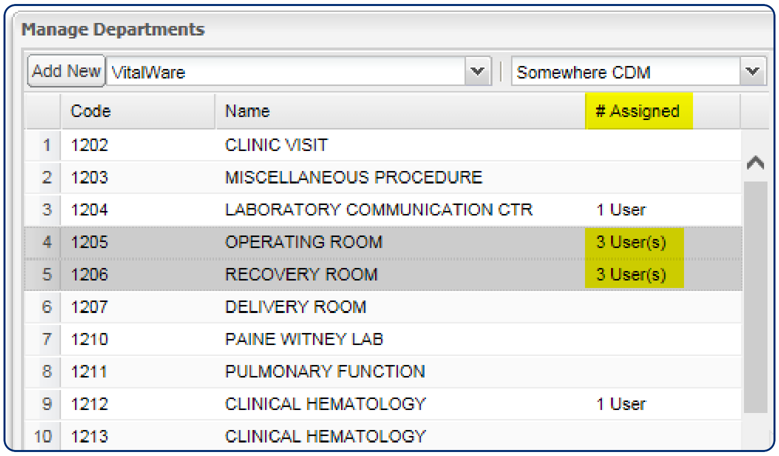
1. Select **Tools** > **Manage Departments**.
2. Select the **Facility** and **CDM file** in the upper left drop-down menu to set and manage department access.
3. Select one or multiple departments using the **CTRL** or **Shift** key. Once selected, the departments are highlighted in gray to indicate the departments identified.
4. In the upper right of the **Manage Departments** window, you can **Assign New Users**. Scroll through the user list to select or search for a user.

> **Note**: Fifty departments will be listed on each page in numeric order. To quickly locate a department, use the page options at the bottom of the **Assign Departments** screen. This allows keying in the page number, moving to the next page of departments or to the last page.



Once you have located users, right-click the users to add them to the departments highlighted. The **# Assigned** column automatically updates as new users are assigned to a department.





Manage Departments

Add New | VitalWare | Somewhere CDM

	Code	Name	# Assigned
1	1202	CLINIC VISIT	
2	1203	MISCELLANEOUS PROCEDURE	
3	1204	LABORATORY COMMUNICATION CTR	1 User
4	1205	OPERATING ROOM	3 User(s)
5	1206	RECOVERY ROOM	3 User(s)
6	1207	DELIVERY ROOM	
7	1210	PAINE WITNEY LAB	
8	1211	PULMONARY FUNCTION	
9	1212	CLINICAL HEMATOLOGY	1 User
10	1213	CLINICAL HEMATOLOGY	

Viewing Assigned Department Access

Organizations have the ability to review and manage users that are assigned to view specific departments.

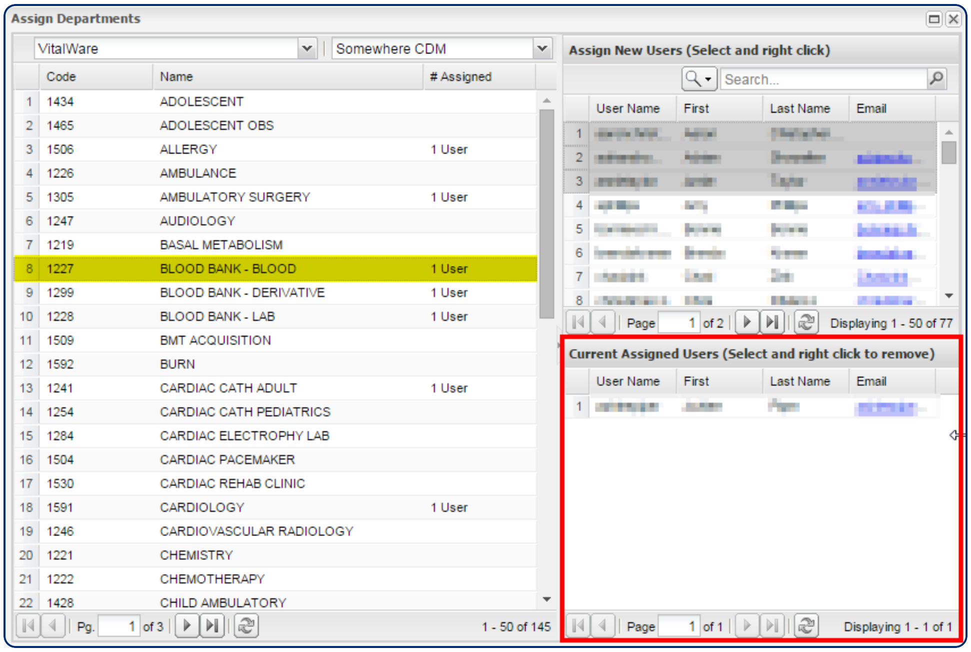
1. Select **Tools** > **Manage Departments**.

   Expand the **Manage Departments** window by hovering over the table lines and dragging to your target location.

2. The left side of the **Manage Departments** window shows a list of departments as well as the number of assigned users. Blank fields within the **# Assigned** column indicate that limited access to department has not been set.

3. To view users who are currently assigned to any department, click the department and the list of assigned users will be visible in the lower right

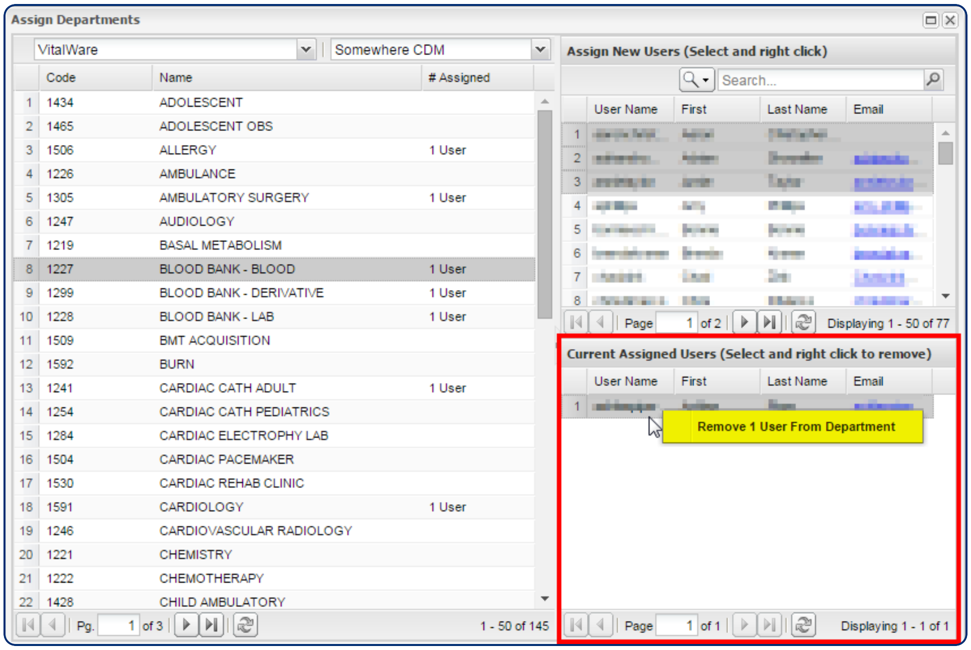
side of the window.



Removing Assigned Department Access

1. Select **Tools** > **Manage Departments**.
2. Expand the **Manage Departments** window to full screen or expand each section by hovering over the table lines and dragging to the target location.
3. The left side of the **Manage Departments** window will lists departments as well as the number of assigned users. Blank fields within the **# Assigned** column indicate that limited access to department has not been set.
4. To remove an assigned user's department, click the department and the list of users are visible in the lower right of the window.
5. In the section titled **Current Assigned Users**, select the users you want to remove.
6. Once the users are located, select and right click to remove users from a

department.

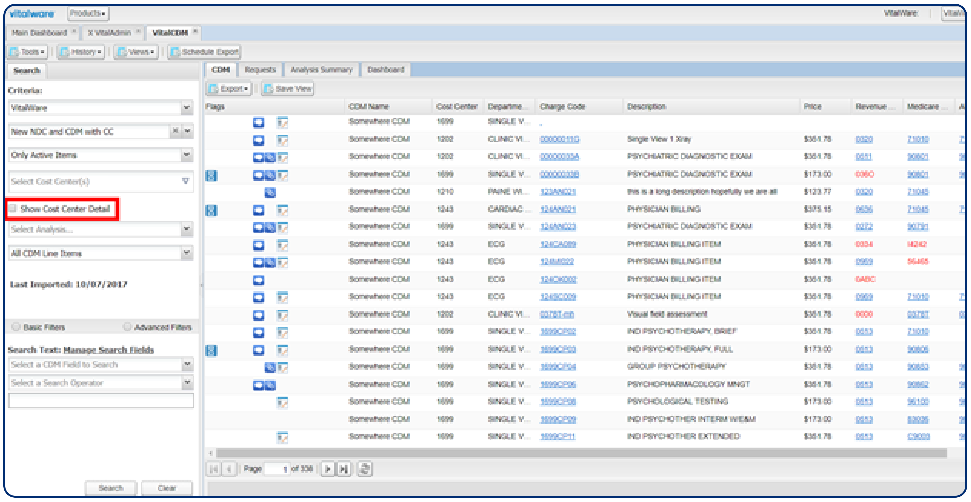


Show Cost Center Detail

Show Cost Center Detail is unchecked by default in the **CDM table** and **Change History (Summary and Detail)**.

- Enables you to view single line items in the table instead of duplicate line items with usage for each cost center when first going to the **CDM table** and **Change History**.

- When you select **Show Cost Center Detail** and click **Search**, the display will refresh to show the cost center details.



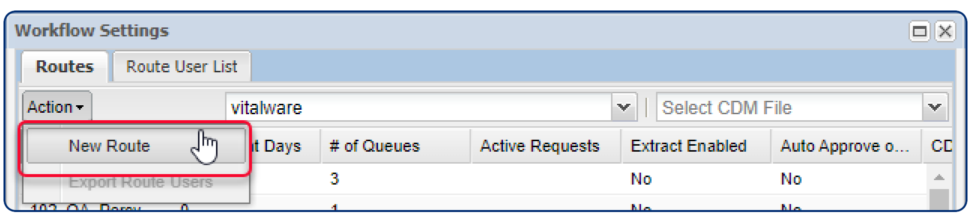
Chapter 8: Workflow Settings

Workflow Settings is where workflow processes are created to define, manage and update within VitalCDM. Workflow Settings ensures additions, modifications, and deactivations on a CDM file are handled efficiently and with accuracy.

Managing Routes

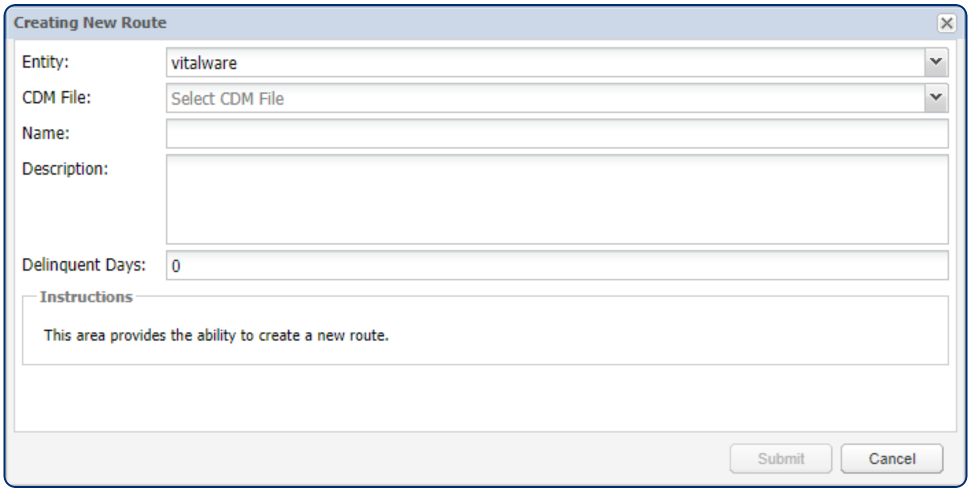
Creating New Routes

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**.
3. Within **Workflow Settings**, select the appropriate **Facility** and **CDM file** from the drop-down list.
4. Click **Action** > **New Route**.



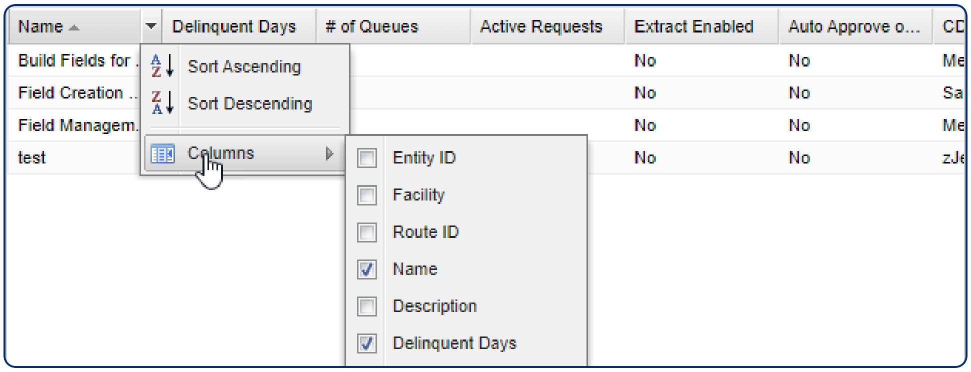
5. Verify that the correct Entity (facility) and CDM file are listed. If necessary, select a new file by using the drop down menu available for each field.
6. Enter a name for the new route in the **Name** field.
7. Enter a description in the **Description** field. This field is optional.
8. Click **Submit** to save new route and return to the **Workflow Settings**

window.



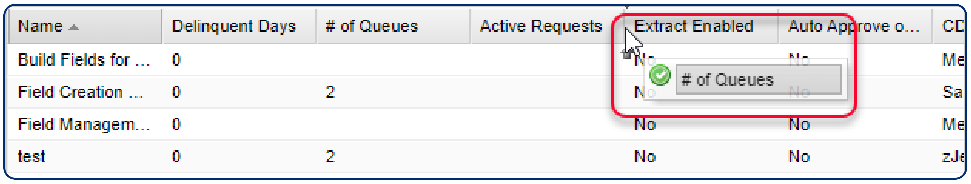
Sorting & View Options in the Route Table

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings.**
3. If not already the default, select the appropriate facility and CDM file using the drop-down selections available in the upper right corner of the **Workflow Settings** window.
4. Columns can be sorted in ascending or descending order. To sort by a column, click the column header once. This will sort the selected column in ascending order. Clicking a second time will sort in descending order. You can also hover over the column header and click on the arrow to display a drop-down selection of additional options.
5. The columns being displayed may also be modified. To utilize these features, hover over any of the column header arrow and select **Columns.**



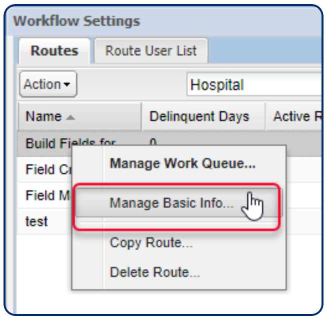
6. Column headers with a checkmark will be included in the **Workflow Settings** window. Columns without a checkmark will not be displayed. To modify the displayed columns, select or deselect as desired.

   Columns can also be reordered. To adjust the location of a column, select a column header and drag to appropriate location on the column header row. Arrows will indiate the new location. Simply release selection to move the column.



Managing Basic Information of Routes

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings.**
3. If not the default, select the appropriate facility and CDM file using the drop-down selections available in the upper right corner of the **Workflow Settings** window.
4. Right click on any route and select **Manage Basic info**.

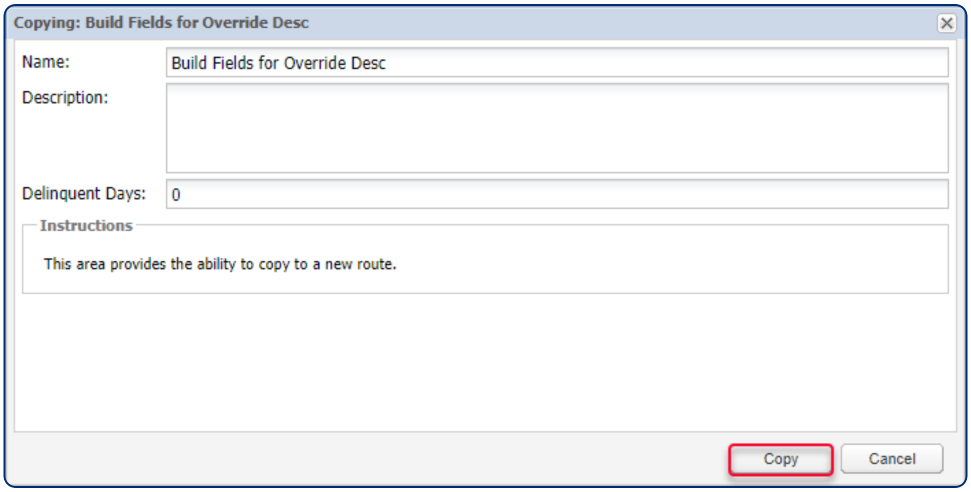


5. A new window titled **Editing: (Route Name)** will be displayed. This window allows you to edit the route name, or add a route description by populating the description field.
6. Click **Submit** to the save the description and return to the previous screen.

Copying a Route

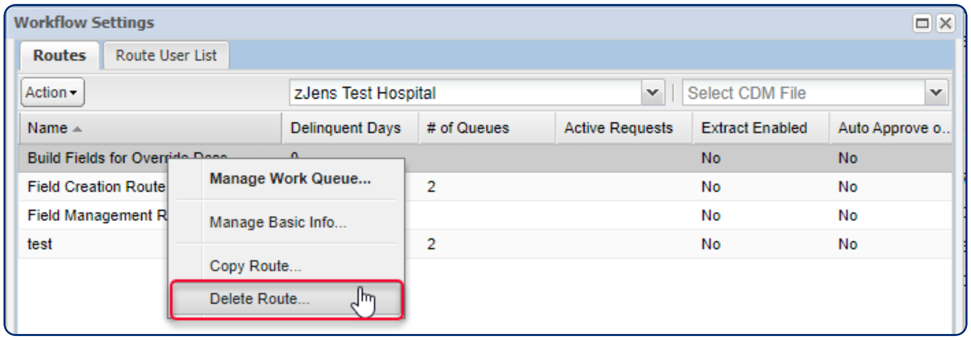
1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**. This will open a new window titled **Workflow Settings.**
3. If not the default, select the appropriate facility and CDM file using the drop-down selections available in the upper right corner of the **Workflow Settings** window.
4. Right click on any route and select **Copy Route**.
5. Enter a name in the **Name** field (50 maximum characters). This is a required field and must be entered before the route can be saved.
6. Descriptions may be added, but are not required (no character limit).

7. Click **Copy** to save and return to the Workflow Settings window.



Deleting a Route

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**. This will open a new window titled **Workflow Settings**.
3. If not the default, select the appropriate facility and CDM file using the drop-down selections available in the upper right corner of the **Workflow Settings** window.
4. Right click on any route and select **Delete Route**.

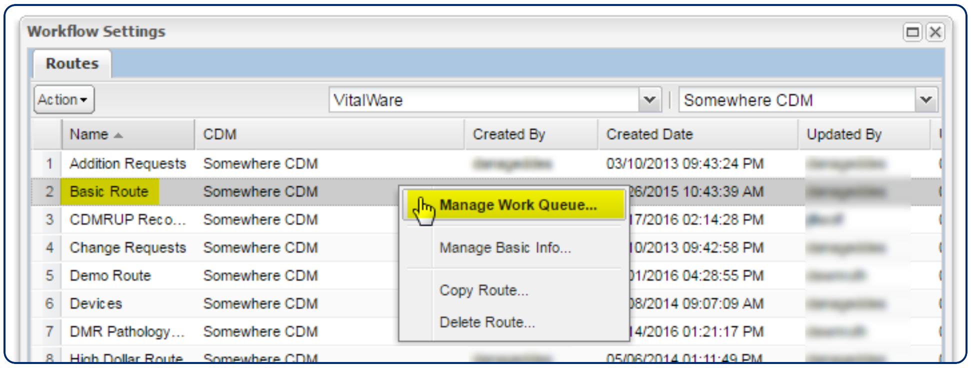


5. Click **OK** to continue with deleting the route and return to the previous screen.

Managing Work Queues

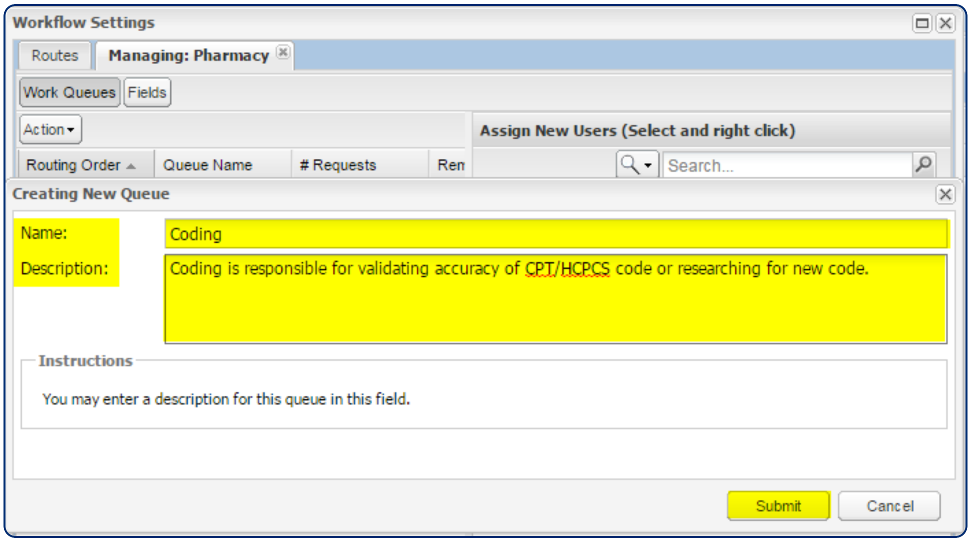
Creating a Work Queue

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**.
3. If not the default, select the appropriate facility and CDM file using the drop-down menu in the upper right corner of the **Workflow Settings** window.
4. Right-click any route and select **Manage Work Queue**.



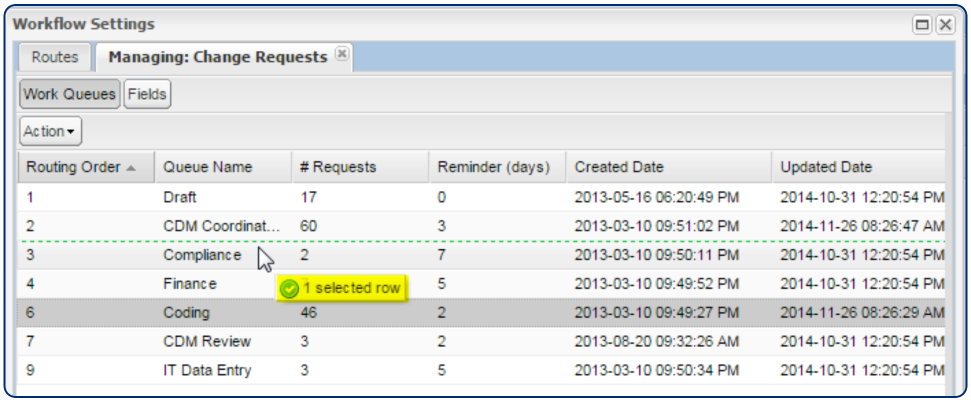
5. Once **Manage Work Queue** has been selected, a new tab will display in the **Workflow Settings** window titled **Managing: (Queue Name)**.
6. **Draft** will be the only Queue name displayed for new routes. Next, you will need to establish a process for the route.
7. To create additional Work Queues (also referred to as stages) select the **Action** button and select **New Work Queue**.
8. Enter a name in the **Name** field (50 max. character limit). This is a required field and must be entered before the queue can be saved.
9. Add a description. The description field is optional.

10. Click **Submit** to save and return to **Managing: (Route Name)**.



Reordering Work Queues

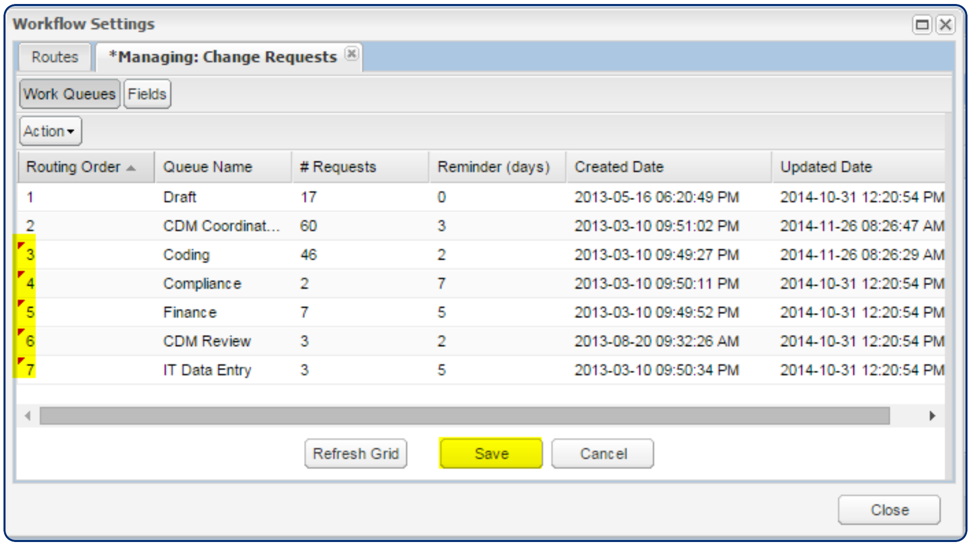
1. To change the order of **Work Queues**, select the row (**queue name**) you want to move and drag to the new location. A green dashed line indicates the new location.



Routing Order	Queue Name	# Requests	Reminder (days)	Created Date	Updated Date
1	Draft	17	0	2013-05-16 06:20:49 PM	2014-10-31 12:20:54 PM
2	CDM Coordinat...	60	3	2013-03-10 09:51:02 PM	2014-11-26 08:26:47 AM
3	Compliance	2	7	2013-03-10 09:50:11 PM	2014-10-31 12:20:54 PM
4	Finance		5	2013-03-10 09:49:52 PM	2014-10-31 12:20:54 PM
6	Coding	46	2	2013-03-10 09:49:27 PM	2014-11-26 08:26:29 AM
7	CDM Review	3	2	2013-08-20 09:32:26 AM	2014-10-31 12:20:54 PM
9	IT Data Entry	3	5	2013-03-10 09:50:34 PM	2014-10-31 12:20:54 PM

2. Any changes made that have not been saved are indicated by a red triangle in the upper left corner of the queue row.

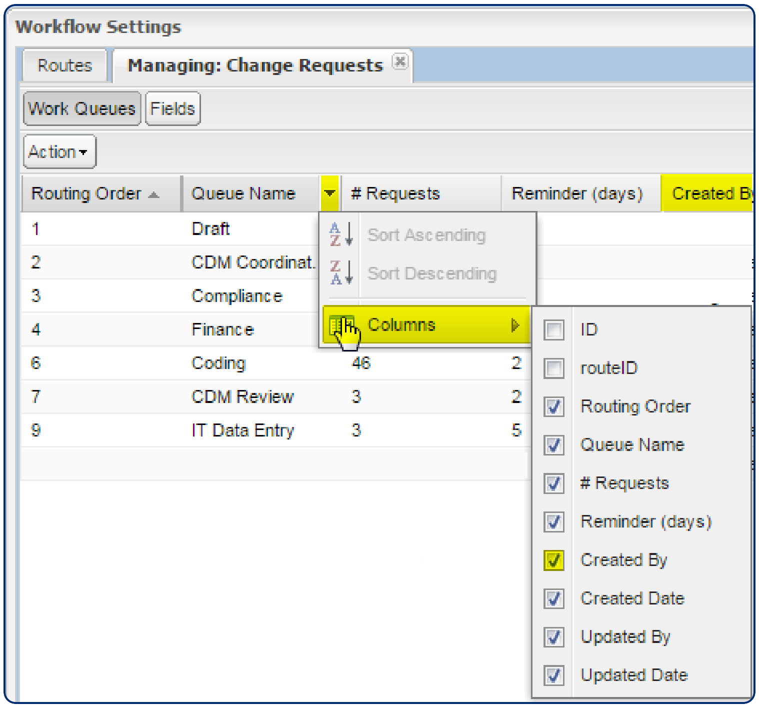
3. Click **Save** to save changes.

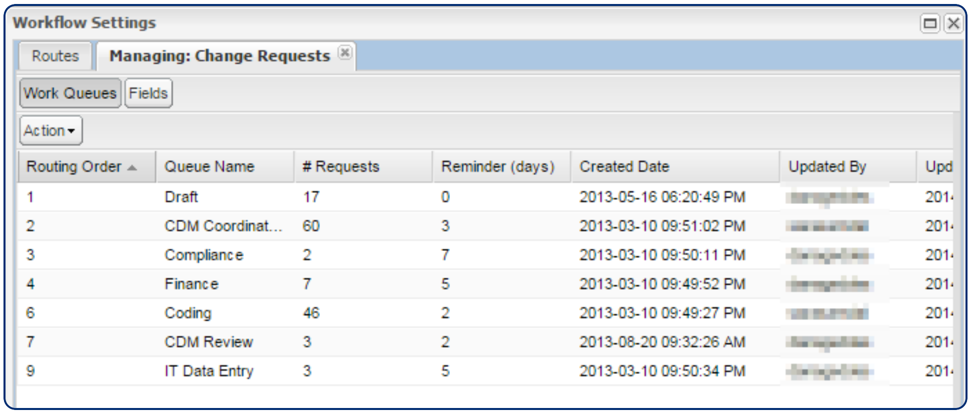


Sorting/View Options of Work Queue Table

Columns can be sorted in ascending or descending order.

- To sort by column, click the column header once. This will sort the selected column in **ascending** order.
- Clicking the column again will sort the column in **descending** order.
- You can hover over the column header, and then click on the arrow to view a drop-down selection of additional options.
- Columns displayed can also be modified. Hover over any of the column headers arrow and select **Columns**.
- Column headers with a check mark will be included in the Workflow Settings/Route window. Columns without a check mark will not be displayed.
- Columns can also be rearranged by dragging the column heading you want to move. Arrows are displayed between columns to indicate where to drop the column.

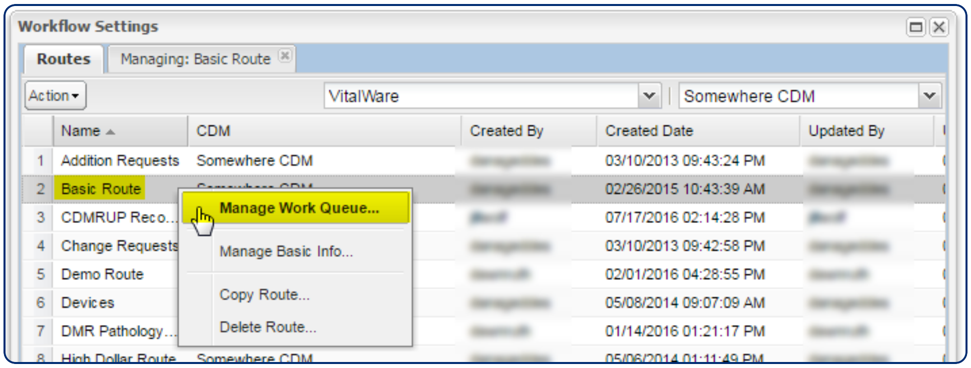




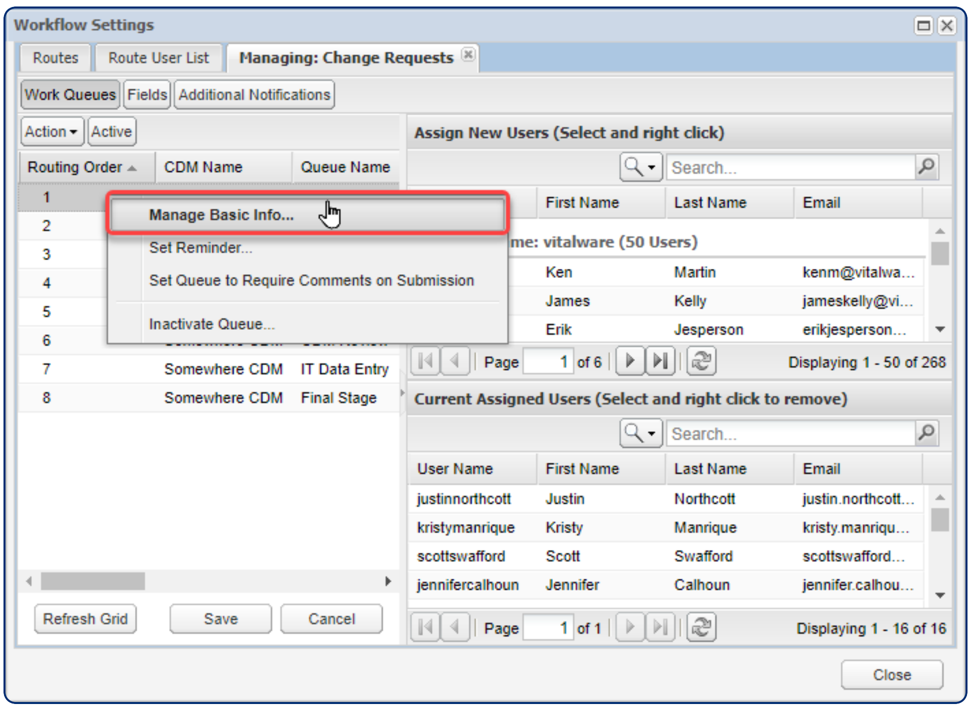
Routing Order	Queue Name	# Requests	Reminder (days)	Created Date	Updated By	Upd
1	Draft	17	0	2013-05-16 06:20:49 PM		201
2	CDM Coordinat...	60	3	2013-03-10 09:51:02 PM		201
3	Compliance	2	7	2013-03-10 09:50:11 PM		201
4	Finance	7	5	2013-03-10 09:49:52 PM		201
6	Coding	46	2	2013-03-10 09:49:27 PM		201
7	CDM Review	3	2	2013-08-20 09:32:26 AM		201
9	IT Data Entry	3	5	2013-03-10 09:50:34 PM		201

Managing Basic Information of Work Queues

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings.**
3. If not the default, select the facility and CDM file using the drop-down list in the upper right corner of the **Workflow Settings** window.
4. Right click on any queue and select **Manage Work Queue**.



5. Select **Manage Work Queue**. A new tab within **Workflow Settings** titled **Managing: (Route Name)** is displayed.
6. Right-click on any queue and select **Manage Basic Info**.



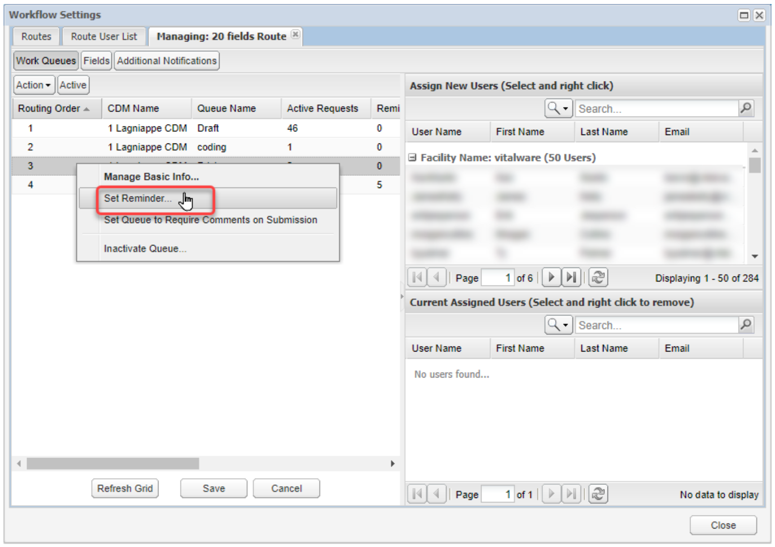
7. You can edit the queue name if necessary. In the description field you can include detailed instructions or notes related to the specified stage and click **Submit** to save.

Setting Reminders

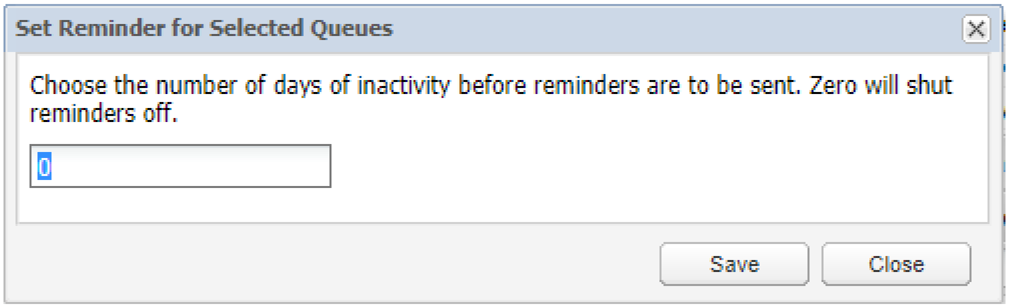
You can set and modify reminders for each work queue. This enables individuals assigned to a queue to receive email notifications that action is required.

To set a reminder, do the following:

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings.**
3. If not the default, select the facility and CDM file using the drop-down list in the upper right corner of the **Workflow Settings** window.
4. Right click on any route and select **Manage Work Queue**.
5. Right-click the work queue, and then select **Set Reminder**.



6. Set the number of days that should pass before a reminder is sent.

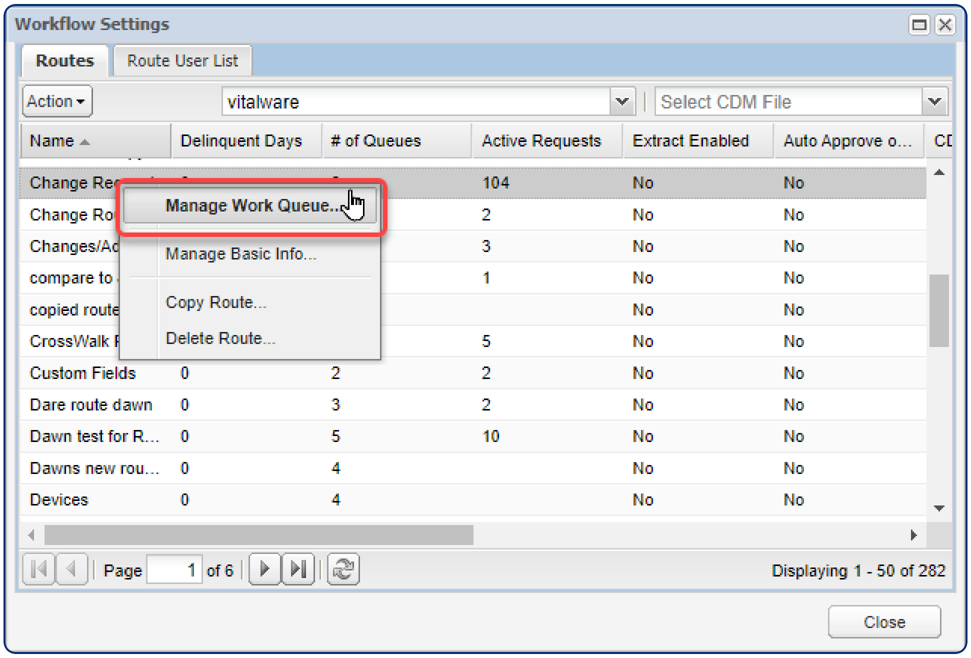


7. Click **Save**.

Deleting a Queue

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**.

3. If not the default, select the appropriate facility and CDM file using the drop-down menu in the upper right corner of the **Workflow Settings** window.
4. Right click on any route and select **Manage Work Queue**.



5. Once **Manage Work Queue** has been selected, a new tab will display in the **Workflow Settings** window titled **Managing: (Route Name)**. Right click on any stage and select **Inactivate Queue**. A message window will appear confirming the queue inactivation.
6. Click **OK** to delete and return to **Manage/Workflow Settings** tab.

> **Note**: If any Requests are in the work queue you have selected to delete, a message will display notifying you that the Requests will need to be moved from the queue before the deletion can occur.

Assigning New Users to a Work Queue

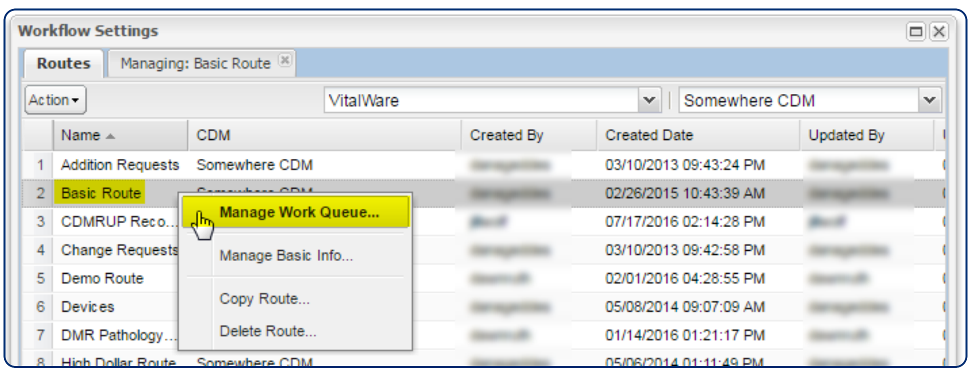
Users assigned to a specific work queue have the ability to provide, update or review CDM line item information within the Request form.

Depending on the level of access, users may also have the ability to do one or more of the following:

- Submit requests to subsequent work queues
- Return requests to previous work queues
- Split, approve, deny or hold requests.

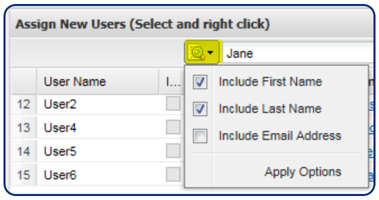
Managing User Work Queue Permissions, Access, and Assignment Updates

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**. This will open a new window titled **Workflow Settings**.
3. If not the default, select the appropriate facility and CDM file using the drop-down menu available in the upper right corner of the **Workflow Settings** window.
4. Right-click any route and select **Manage Work Queue**.

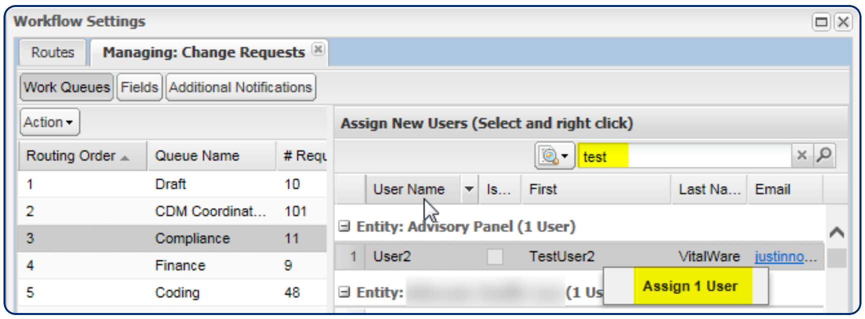


5. Once **Manage Work Queue** has been selected, a new tab will display in the **Workflow Settings** window titled **Managing: (Route Name)**.
6. Click on any queue to display sections on the right titled **Assign New Users** and **Current Assigned Users**.
7. Locate users by either scrolling through the list of available users or using the search field located in the upper right portion of the **Assign New Users**

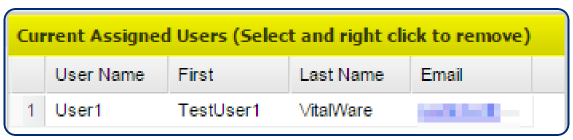
window. To specify the user information used in search, click the button located to the left of the text field.



8. Once the users have been selected, right-click and select **Assign (# selected) User**.



9. Users assigned will appear only in the **Current Assigned Users** section of window and will no longer appear in the **Assign New Users** section.



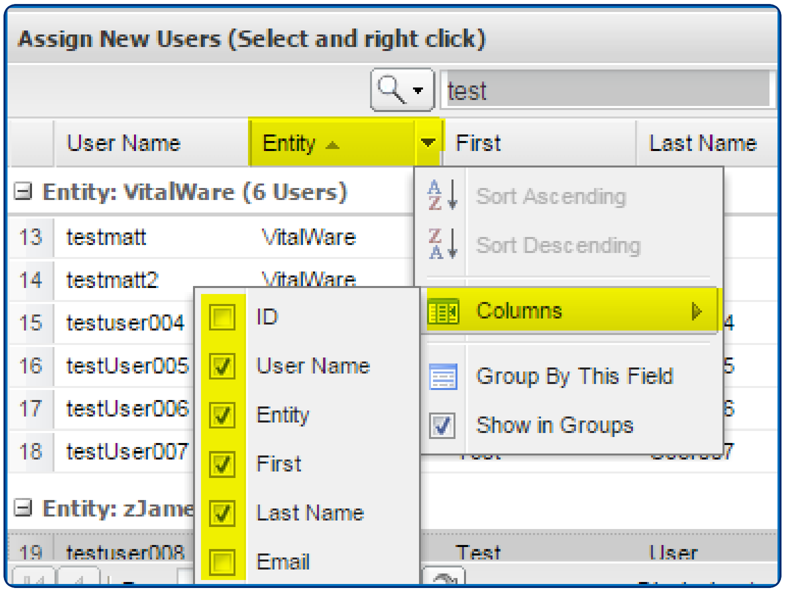
> **Note**: You will only see routes that they have been assigned in at least one queue. At minimum, to access a route, users should be assigned access to the Draft queue.

Features Available within Assign/Currently Assigned Users

- Columns can be sorted in ascending or descending order:
  - To sort by any column, click the column header once. This will sort the selected column in ascending order.

- Clicking a second time will sort in descending order. You can also hover over the column header and click on the arrow to display a drop-down selection of additional options.

- Columns displayed can also be modified. To utilize this feature, hover over any of the column headers arrow and select **Columns**.

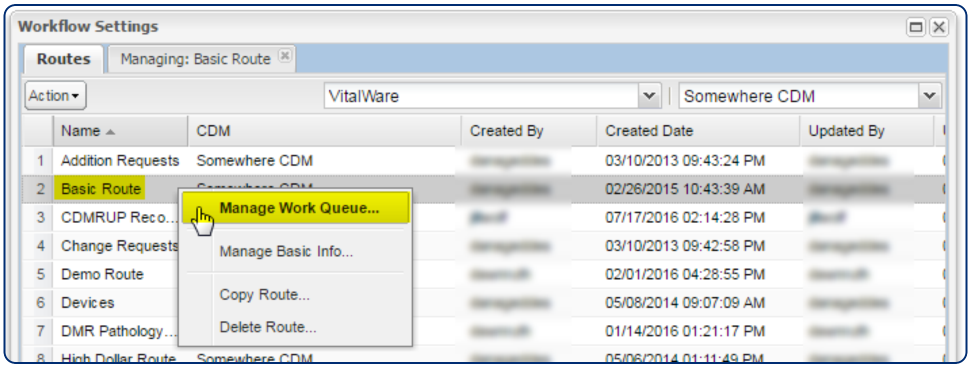


- Columns can also be rearranged by dragging the column header. Arrows displayed between columns indicate where to drop the column.
- Results can also be grouped by any of the column headers by utilizing the **Group By This Field** and **Show in Group** options. By default, users are grouped by Entity. Hovering over any column header will result in a drop down menu with options to group by that column. For example, users can group the display by first name to see all users named Aaron.

Deleting Users from a Work Queue

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**. This will open a new window titled **Workflow Settings**.

3. If not the default, select the appropriate facility and CDM file using the drop-down selections available in the upper right corner of the **Workflow Settings** window.
4. Right-click on any route and select **Manage Work Queue**.



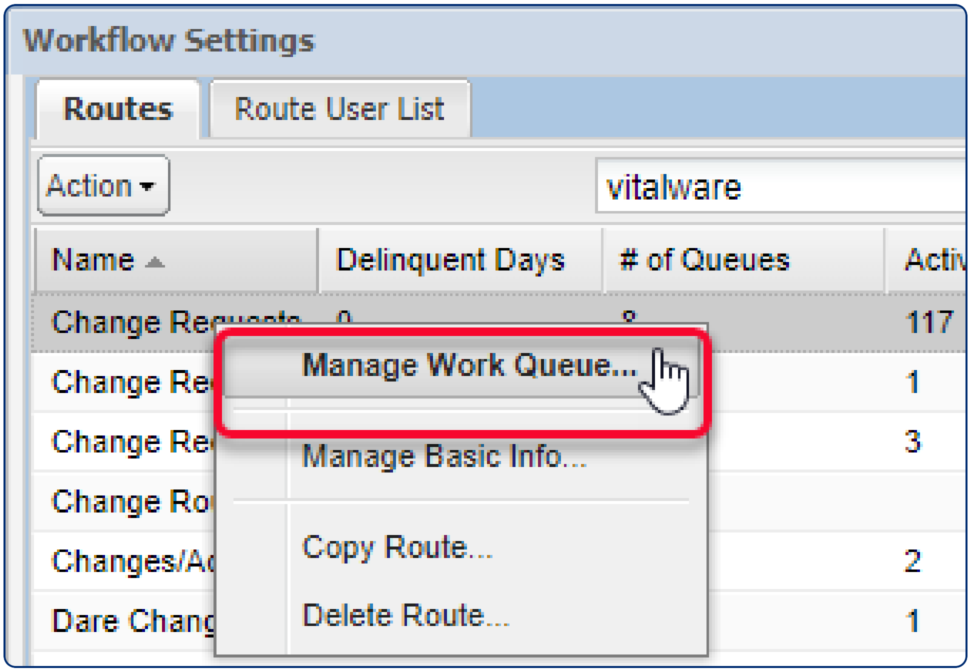
5. Once **Manage Work Queue** has been selected, a new tab will display in the **Workflow Settings** window titled **Managing: (Route Name)**.
6. Click on any stage to open up panels on the right side of the page titled **Assign New User** and **Current Assigned Users**.
7. Select the users within the **Current Assigned Users** window.
8. Right-click and select **Remove 1 User**.

Managing Queue Fields

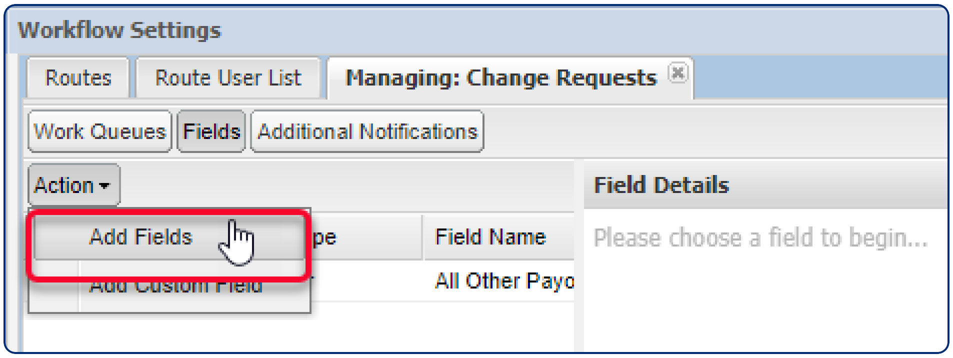
Adding Fields

The **Adding Fields** section enables customized columns (fields) of data to be displayed, edited or hidden from each queue within the route. This section also allows for specific field instructions to be entered and managed.

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**. This will open pop-up window titled **Workflow Settings**.
3. If not the default, select the appropriate facility and CDM file using the drop down menu in the upper right corner of the **Workflow Settings** window.
4. Right-click any route and select **Manage Work Queue**.

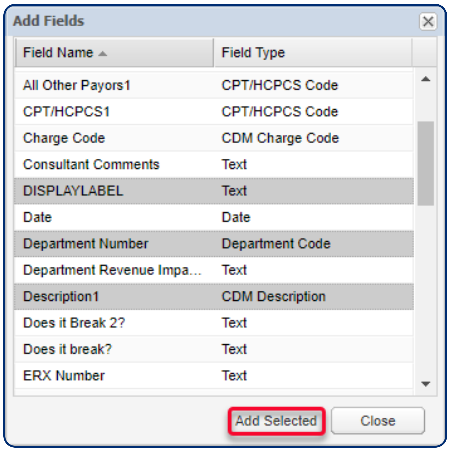


5. Once **Manage Work Queue** has been selected, a new tab will display in the **Workflow Settings** window titled **Managing: (Route Name)**.
6. From the **Manage: (Route Name)** tab, click **Fields**.
7. Select the **Action** drop-down list and click **Add Fields**.

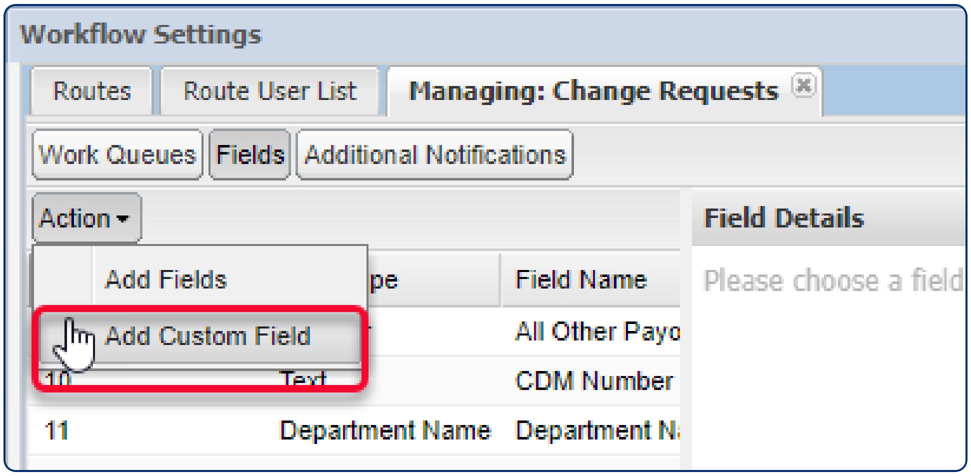


8. A list of available fields will appear. Select one or more fields to be displayed within work queue and click **Add Selected**.

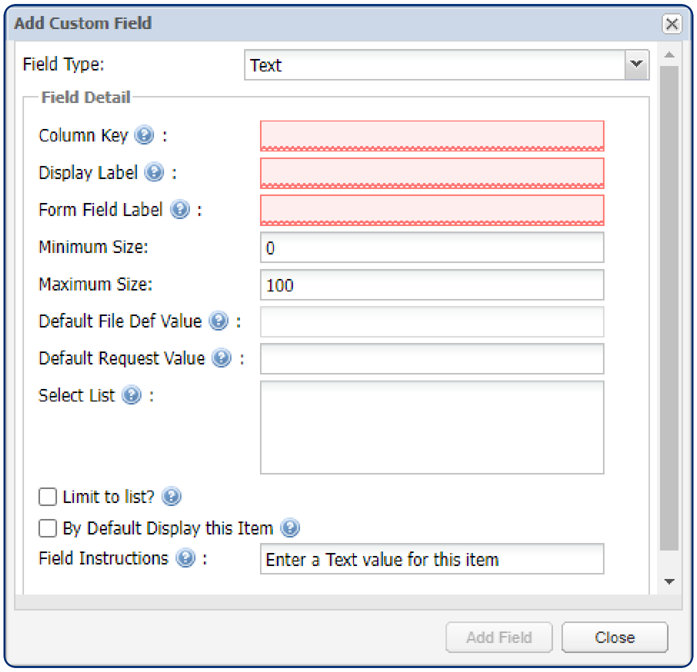
Note: Fields will be displayed in the route in the order they are selected in the add fields window.



9. To add additional fields not in your available list, select the **Action** drop-down menu and select **Add Custom Field**.



10. Select the **Field Type** from the drop down selections and select **Add Field**.
11. Enter the required fields (indicated in red) and any of the optional field data as needed.
12. Select **Add Field** and then **Close** to return to the previous screen.

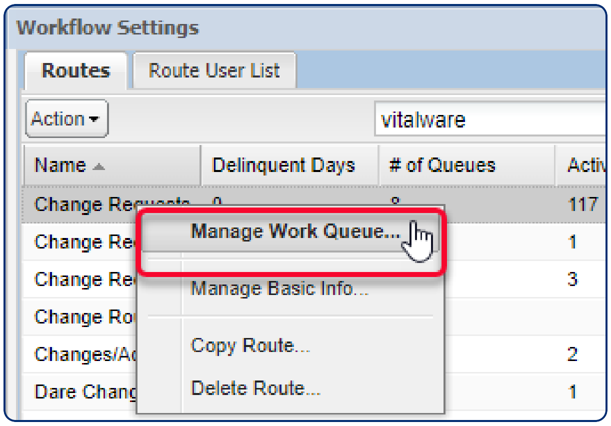


Setting Field Details/Permissions

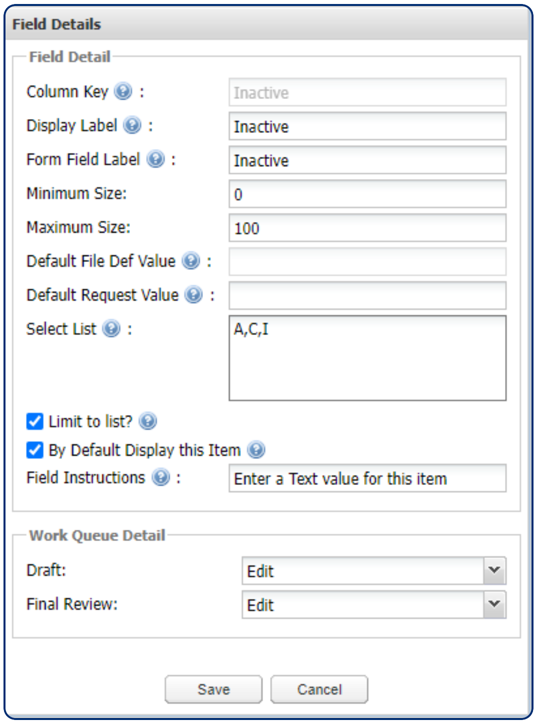
Field permissions can be set specifically for each work queue, allowing workflow access to the information required with the appropriate edit permissions.

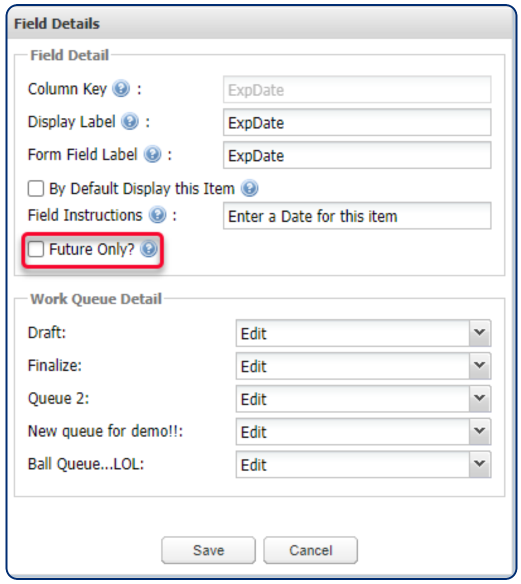
Within the **Work Queue Detail** section of the **Field Details** panel, each stage within the queue can be customized to either Edit, Read-Only, Hide or Required.

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**.
3. If not the default, select the appropriate facility and CDM file using the drop down menu available in the upper right corner of the **Workflow Settings** window.
4. Right-click any route and select **Manage Work Queue**.



5. Once **Manage Work Queue** has been selected, a new tab will be displayed in the **Workflow Settings** window titled **Managing: (Queue Name)**.
6. Click **Fields** in the upper left corner of the window.
7. Click on any available field to open the **Field Details** panel on the right side of screen.
8. Many field details can be modified. The **Display**, **Form Field** and **Field** labels Instructions can all be modified. In addition, a default request value can be entered if the field is auto-populated with a default value. A drop down list can also be created in the **Select List** section. Each entry must be comma separated. The order listed in this field is the order that will be listed in the drop-down list. Once all changes have been made, click **Save**. For date fields, there is an option to set the field to only accept current or future dates.



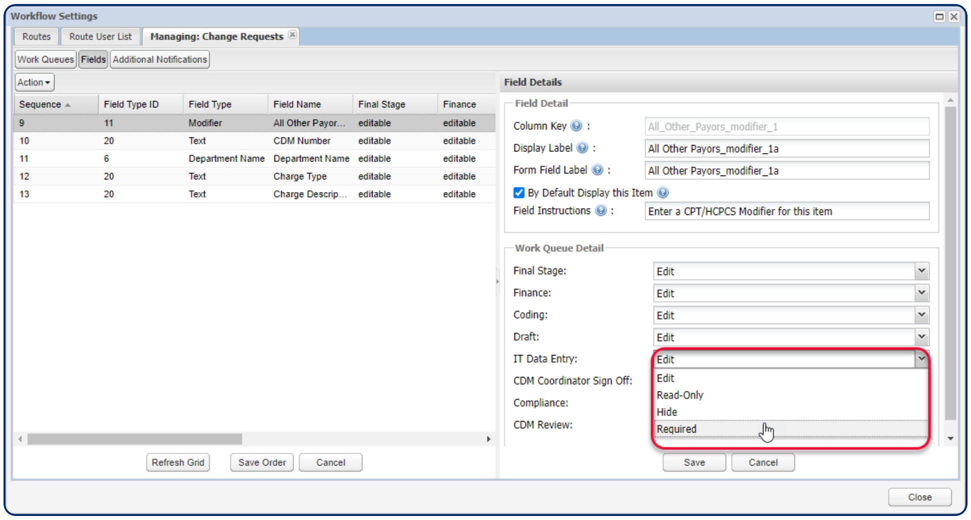


9. The section titled **Work Queue Detail** allows for field permissions to be set for each field at each queue.
10. Each queue within the route will be listed as well as the following options: **Edit**, **Read-Only**, **Hide**, and **Required**.
11. **Edit** will be the default permission for each field in each stage (except the **Charge Code** field will be set to Read-Only). To modify settings, make the appropriate selection in the **Work Queue Detail** section using the drop down menu.

> **Note**: Any field within the work queue you do not want to see processing should be set to **hide**.

- **Edit**: Will allow users with access to work queue route the ability to modify the field
- **Read-Only**: Will display field to users with access to work queue route but will not allow for field to be modified

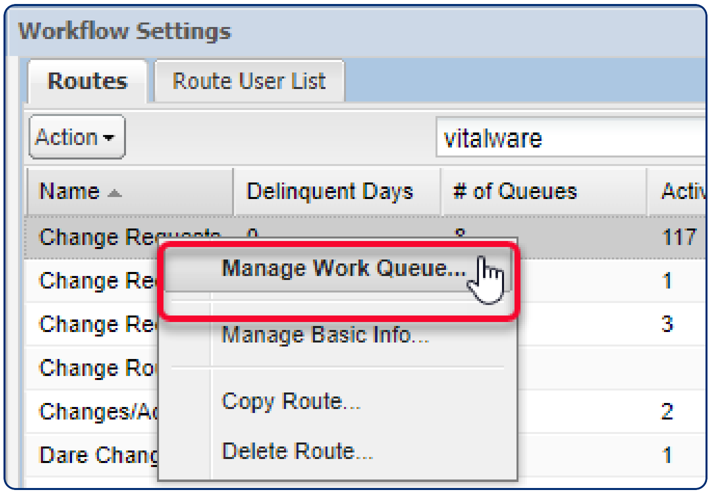
- **Hide**: Field will not be displayed to users within work queue route
- **Required**: Users with access to work queue routes will not be able to move (submit, move or approve) a request unless the field is populated



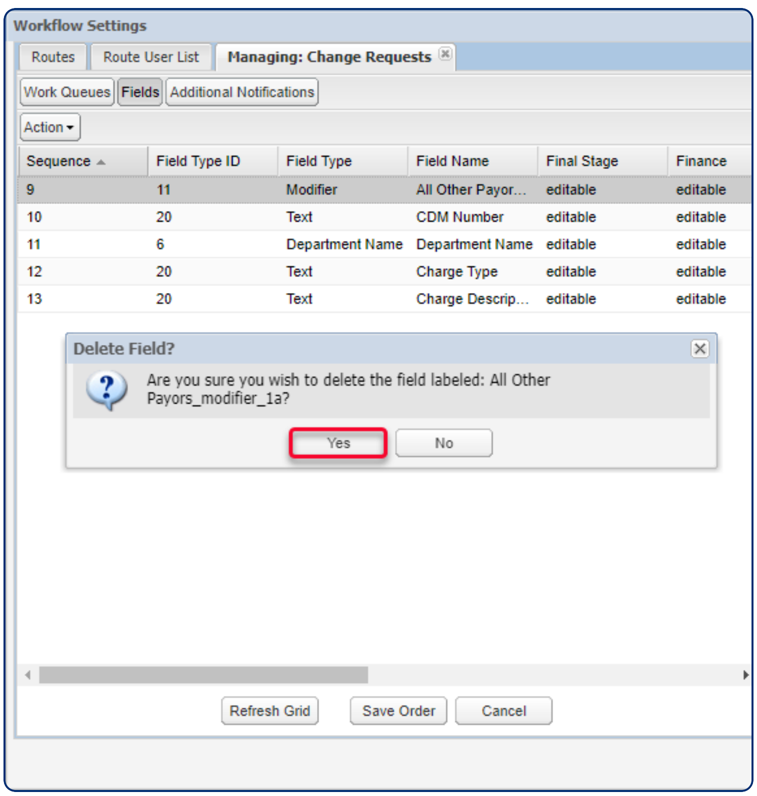
Note: Clicking on another field prior to saving your work will invoke a prompt to confirm a potential loss of unsaved information.

Deleting Fields

1. Select **Products** > **VitalCDM**.
2. Select **Tools** > **Workflow Settings**.
3. If not the default, select the appropriate facility and CDM file using the drop down menu in the upper right corner of the **Workflow Settings** window.
4. Right-click on any route and select **Manage Work Queue**.



5. Once **Manage Work Queue** has been selected, a new tab will display in the **Workflow Settings** window titled **Managing: (Route Name)**.
6. Click **Fields** button in upper left corner of window.
7. Right click on any field and select **Delete Field**. A confirmation window will appear. Click **Yes** to delete field and return to the previous screen.

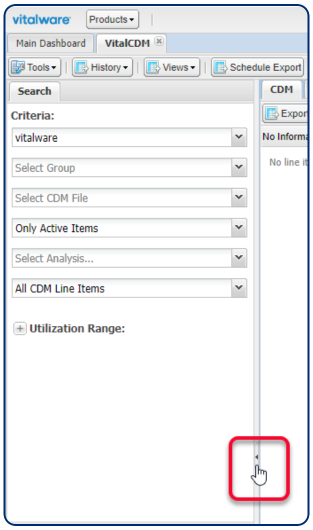


Chapter 9: Analysis Reports

VitalCDM includes predefined analysis reports which can be customized enabling adding specific criteria that may not be included in the predefined analysis reports. Reports are accessed within the **Search** panel.

Report Results Screen

1. Select **Products** > **VitalCDM**.
2. The left panel shows the **Search** tab with filter and search options. Once criteria have been defined, click **Search**. The report interface is located to the right of the search panel.
3. The search panel may be minimized by clicking the arrow located in the center of the dividing line between the search panel and the **Report table**.



Report Filters

Report filters vary depending on the report you select for review. Standard filters that display consistently are:

Organization (Hospital/Facility Name)

CDM File. If only one CDM file exists, this will default automatically. If more than one CDM file has been imported for the specific facility, the drop down menu is available. A default CDM can be set by the organization's dedicated Account Manager or saved using the Save File Selection described below.

- Active/Deactivated Items
- Department
- Analysis

Suggested Scheduled CDM Reports

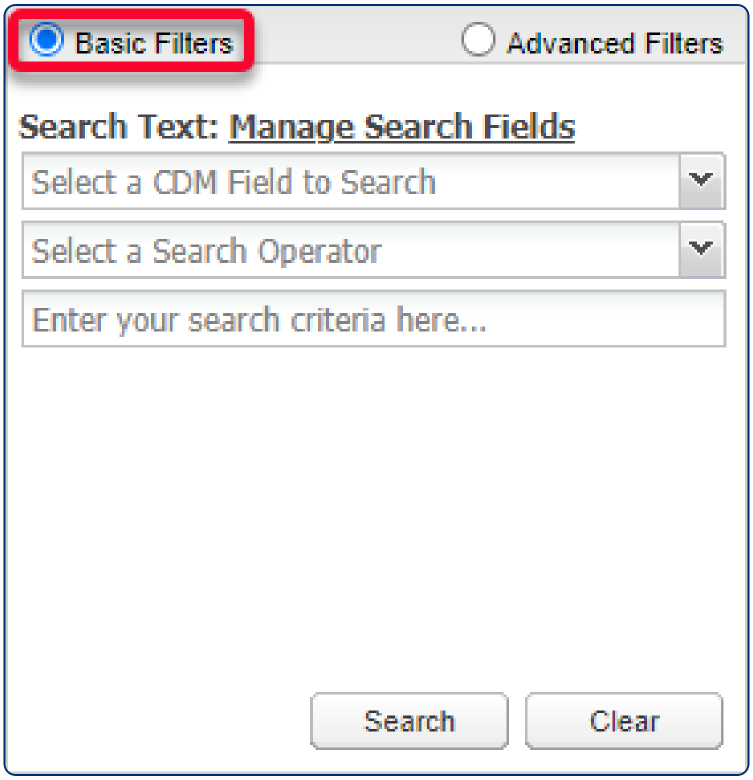
The default view is **All CDM Reports**. If another filter is selected, the list of reports is filtered to show only the reports which are suggested for review on a monthly, quarterly, semi-annual or annual basis.

- **Report**
- **Analysis Dates**: Selecting a specific analysis date reports the CDM file data on that date.
- **Last Import date**: This is informative only; not an interactive filter.
- **Utilization Range**
- **Basic Filters**
- **Advanced Filters**: Includes both Term and Analysis fields options

Basic Filters

If you need to search on a specific field in a CDM file, you can use Basic Filters. Any field imported into VitalCDM will be available via the drop down menu **Select a CDM Field to Search**. The operators listed in **Select a Search**

Operator will update depending on the field type chosen in the first drop down. If you have multiple fields to search, you can use the **Advanced Filters** option.

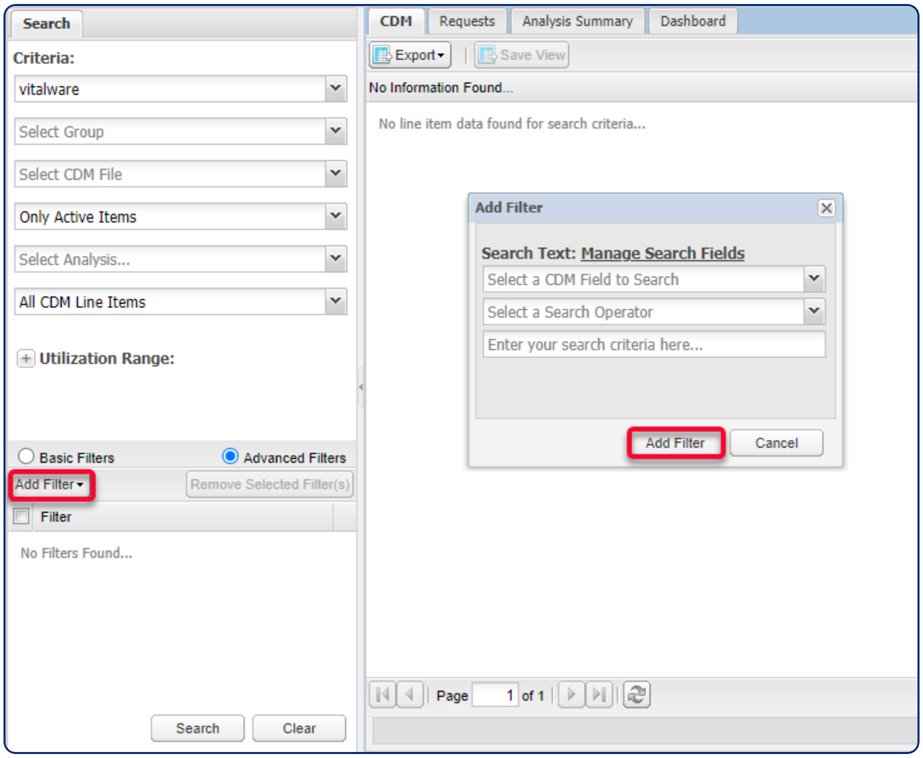


Advanced Filters

Advanced Filters enable search across multiple fields.

1. Select **Advanced Filters**, then click **Add Filter**. There are two options: **Term Field** and **Analysis Field**.
   - **Term Field** filter allows you to search on any existing field in the CDM file you selected.
   - **Analysis Filters** allow search parameters to be entered against fields that have been generated in the analysis process to populate reports (e.g. APC Variance Percent).
2. After entering your search criteria, select **Add Filter**. The search criteria will appear in the left panel in the filters area.
3. Select **Add Filter** and input fields until all of your criteria has been added.

4. Click **Search** at the bottom of the left panel.



You can remove filter criteria by clicking the box next **Filter** to remove ALL criteria or select the box next to a specific criterion you want to remove.

1. Click **Remove Selected Filter(s)** to finalize field removals.
2. Click **Search** at the bottom of the left panel to refresh the results in the table.

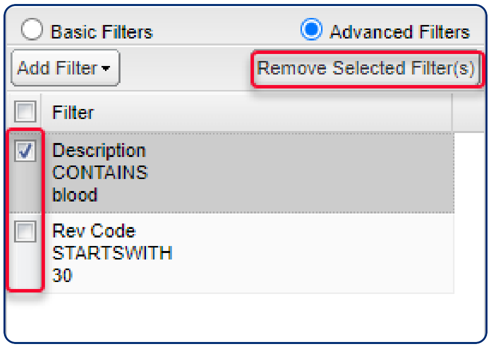


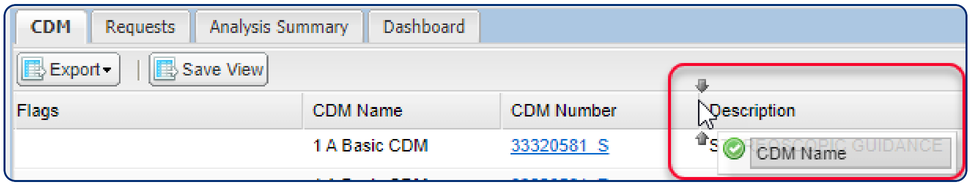
Table Display

- **Default Columns**: Columns visible are the default columns setup by your account manager during the column definition setup process.
- **Viewing Other Columns**: You can add columns to a view by right clicking on any column header and selecting **Columns** or **Columns Not Loaded**.

Sorting Columns

Columns can be sorted in either ascending or descending order.

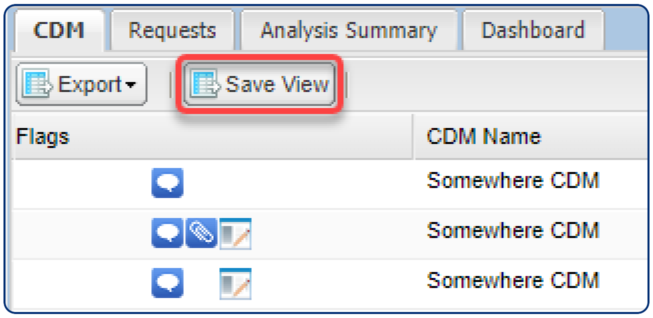
- **Ascending**: Click the column header once.
- **Descending**: Click the column a second time. The column will sort in descending order.
- **Column Display Order**: Columns can be rearranged by dragging the column on the header location you want to move. Arrows between columns indicate where the column can be dropped.



Saving Views

After you have performed a search and organized the columns, you can save the current view. When you open a saved view, the name of the view displays at the top of the results pane. When you select an analysis that has a default column layout in a saved view, the name of that saved view will display above the results table, along with the text **(Saved Column Model)**.

1. Click **Save View**.

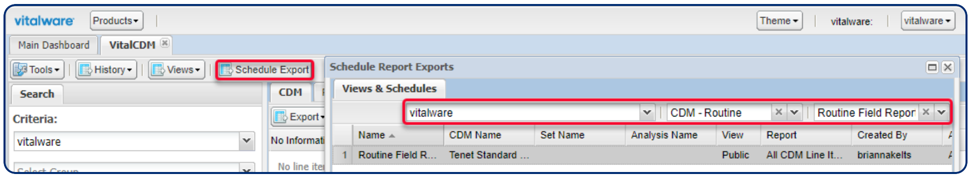


2. Select from the following options:
   - **Save Search Criteria**. Includes the search criteria, including analysis, departments, more filters, etc. in the view.
   - **Save Column Layout**. Applies the column order, as well as any sorting you have applied.
   - **Set as Report Default Column Layout**. Saves the current column layout as the default for the selected analysis.
   - **Set as Search Default**. Saves the search criteria as the default to display when you open VitalCDM.
   - **Make Public**. Makes the view available for other users at your entity.
3. Click **Save New**.

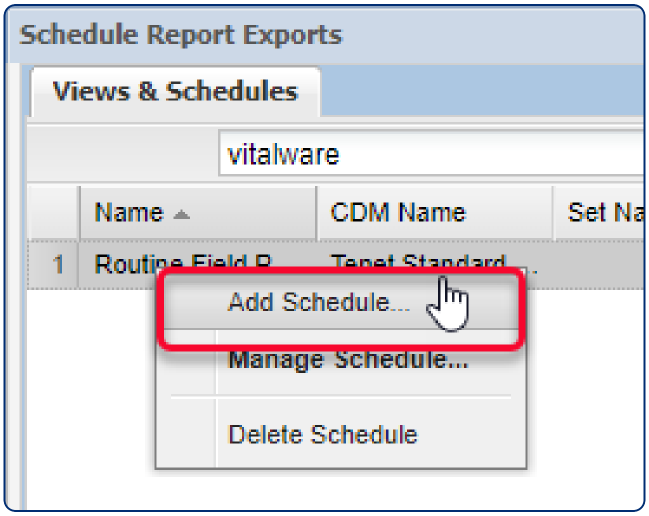
Scheduling Reports

You can schedule reports for delivery on a user-defined time schedule.

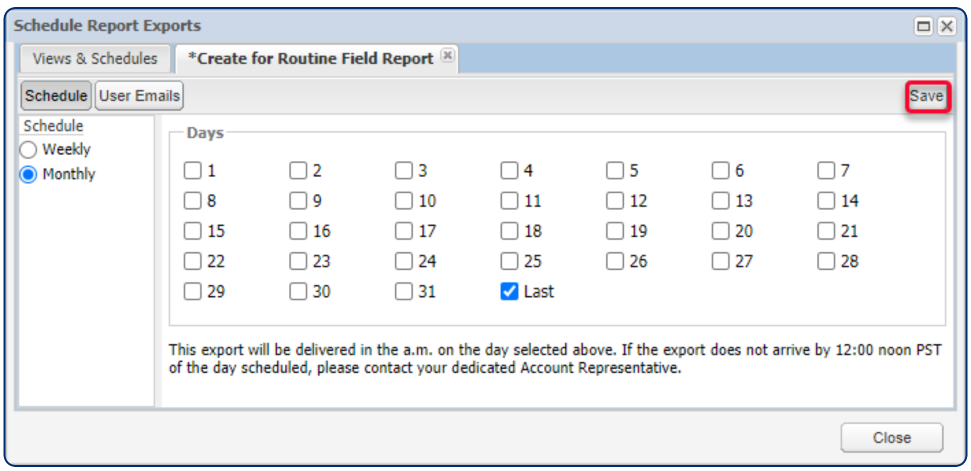
1. Click **Schedule Export** and select the view you would like to receive:



2. Right-click the report and select **Add Schedule**.



3. Select which regularly scheduled weekly or monthly interval you want the report sent, and click **Save**.



Hospital Medicare Analysis Reports

Analysis Summary

This report provides summary counts for three summaries, based on the first analysis selected in the left panel and summary counts for exceptions found in the analysis process of the CDM file. Summary counts do not include inactive and excluded items. From this report, you can click on the blue hyperlink counts and review report detail. Export file name is Summary.

All CDM Line Items (Prior to Analysis)

This report contains all line items that have been imported into VitalCDM. No analysis has been performed on this report. Export file name is All CDM Items.

All CDM Line Items (With Analysis)

This report contains all line items that have been imported into VitalCDM with analysis applied. The counts may be different in this report than in the All CDM Line Items – Prior to analysis report as there are lines that potentially do not fall on any analysis report criteria. When exported, all individual reports displayed in the selection drop down list - except the **Pricing Analysis**, **SAF Peer Data Analysis**, and **All Excluded CDM Line Items** are available on one document with multiple tabs. Listed below each report are the tabs that appear on the export document. Export file name is All CDM items.

All Excluded CDM Line Items

This report contains all line items that have been previously excluded and do not appear in any analysis reports. If an export is needed, the **ALL Excluded CDM Line Items** must run separately, then exported. This report is not included in the **All CDM Line Items** analysis export document. Export file name is All Excluded Items.

Usage for All CDM Items

This report will total all usage columns within a CDM file and populate the **Total Usage** column. The **Total Usage** column can be filtered to show all items with "0" usage or usage less than or over any defined threshold.

APC Payment

This report displays all items that are subject to APC payment. Columns are available to display the **APC**, **APC payment rate**, **APC wage-adjusted payment amount**, and **APC variance** (difference between the CDM line item price and the APC payment). Export file name is APC Payment Exception.

Cost to Charge Analysis

This report calculates the variance amount and percent of variance between the cost and charge/price fields. The report can be filtered and sorted as needed.

Deleted CPT®/HCPCS Codes

This report displays all items that have been deleted according to the date entered into the CDM file analysis process. If a replacement code exists, a column is available for display that will denote one. This column will include a true/false indicator; a response of true indicates a replacement code will be displayed in the **Suggested Codes** tab in the lower portion of the screen when a **CPT/HCPCS** code from the report is selected.

Additionally, if **Refer to Code(s)** exist, a column is available for display that will denote that these codes are available. This column will include a true/false indicator; a response of true indicates that **Refer to Code(s)** are available and will be displayed in the **Suggested Codes** tab, appearing in the lower portion of the screen when a **CPT/HCPCS** code from the report is selected. Information on whether the codes already exist in the CDM file will also be displayed. Export file names are No Replacement CPT-HCPCS, Replaced CPT-HCPCS, and Refer -To CPTHCPCS.

Device Codes

This report provides a listing of all device codes included in the CDM file in the **results** section of the interface. By clicking on a designated CDM charge code, the **Missing Devices** tab will open at the bottom of the screen. The **Missing Devices** tab identifies device codes that are **Missing Devices** tab will also be available along with other tabs providing specific details related to the HCPCS code selected. Export file names are Devices and Missing Devices.

Device Relationships

This report provides you with a listing of all CDM line items that have device to procedure, or procedure to device relationships. Clicking on the **CPT/HCPCS** will open the bottom panel to display the **Suggested Codes** tab and the linked information along with a notation in the last column of any CDM numbers that list the code. Export file names: Device Relationships and Related Codes.

Duplicate CPT/HCPCS

This report displays all line items where more than one line item has the same CPT or HCPCS code. It will also display a flag of price variance if the same CPT/HCPCS is found in the same department with a different price. The price variance flag appears as a true/false statement in the report. The report might be filtered to reflect the true statement results only. Revenue codes of 960-989 are taken into consideration when determining a true/false flag. Export file tab name is Duplicate Code Variance.

FAC Fee Schedule Payment

This report displays all items that are subject to LAB or Medicare Physician Fee Schedule (MPFS) payment. Columns are available to display the Fee Type, FAC Fee Schedule Payment and Fee Schedule Variance (the difference between the CDM line item price and the Fee Schedule payment). Two new columns are available that show the APC Status Indicator and the MPFS Status Code. Export file name is Fee Schedule.

Invalid CPT/HCPCS Codes

This report displays all line items with CPT/HCPCS codes that are found to be invalid and unbillable. Export file name is Invalid CPT-HCPCS.

Invalid Modifiers

This report displays all line items with a modifier that is invalid and unbillable. Export file name is Invalid Modifiers.

Invalid Revenue Codes

This report displays all line items with revenue code that are found to be invalid and unbillable. Export file name is Invalid Revenue Codes.

LCD/NCD

This report displays all CPT/HCPCS that are listed in **Local Coverage Determination (LCD)** or **National Coverage Determination (NCD)**. This report is useful in determining which codes in the CDM need to meet medical necessity and possibly obtain an Advance Beneficiary Notice (ABN). Export file name is Codes with Policy.

Medicare Code Options

This report provides a listing of all codes in a CDM that Medicare requires or suggests a different code to be billed in place of the code in the CDM. Clicking on the **CDM charge code** or **CPT/HCPCS** code will open the bottom panel to **Suggested Codes** tab and the linked information, along with a notation in the last column of any CDM numbers that list the code. In addition, click on the **Medicare Crosswalk** tab in the bottom panel, then click on the CPT/HCPCS alternate code for more detail. A top panel will be appear and display the code. In the bottom panel, the **Add On** tab, will show other CPT/HCPCS codes that may be billed in addition to the primary code, if applicable. Export file names are Has Medicare Crosswalk and Medicare Crosswalk.

Missing Primary/Add-On Relationships

This report lists any line item in the CDM file that contains a missing 'primary' code or a missing add-on code within the same department. Clicking on **CDM charge code** or the **CPT/HCPCS code** will open the Code Detail panel to show the **Suggested Codes** tab and additional tabs (e.g., **Medicare Crosswalk** and **Add On**) for more detail and to view missing primary or add-on codes within the same department. When exported, a separate tab is generated as **Missing Related Detail** that serves as a companion document. Export file names are Missing Related and Missing Related Detail.

Not Billable to Medicare Payer (SI M)

This report displays all items designated to have a status indicator of **M** in the Outpatient Prospective Payment System (OPPS). These line items are not billable to the Medicare Payer or paid under OPPS. Export file tab name is Not Billable to Medicare.

Not Recognized by Medicare (SI E)

This report displays all items designated to have a status indicator of **E** in the OPPS. These items, codes and services are not paid; are considered to be non-covered by any Medicare outpatient benefit category; are statutorily excluded by Medicare; and are considered not reasonable and necessary. These items are not paid under OPPS or any other Medicare payment system. Export file name is Not Recognized by Medicare.

Not Recognized by OPPS (SI B)

This report displays all items designated to have a status indicator of **B** in the OPPS. These codes are not recognized by or paid under OPPS when submitted on an outpatient hospital Part B bill type (12x and 13x). These codes may be paid by intermediaries when submitted on a different bill type. For example, bill type 75x (CORF) would not be paid under OPPS. An alternate code that is recognized by OPPS when submitted on an outpatient hospital Part B bill type (12x and 13x) may be available. Clicking on the **CDM charge code** or **CPT/HCPCS** code will open the bottom panel to display the **Suggested Codes** tab and the linked information along with a notation in the last column of any CDM numbers that list the code. The **Medicare Crosswalk** tab also displays a list of alternate codes if available. When exported, a separate tab is generated as **OPPS Medicare Alternate** that serves as a companion document. Export file names are Not Recognized by OPPS and OPPS Medicare Alternate.

Pricing Analysis

This report shows pricing information obtained from the Standard Analytical File (SAF) data file published by CMS. Under the **Tools** menu, select **Analysis Details**. You can select up to 10 states, hospital bed size (four options), National Percentiles (five options), Teaching/NonTeaching, and Urban/Rural as additional options to add to the Peer Avg Charge and Wage-Adjusted APC in the analysis process. You select any or all of the available options. This report displays the average charge by CPT/HCPCS in the report (if there are more than 5 occurrences in the data file provided by CMS) for each data element selected. If an export is needed, the Pricing Analysis must run separately, then exported. This report is not included in the All CDM Line Items analysis export document. Export file name is Pricing Analysis.

PRO Fee Schedule Payment

This report displays all items that are subject to the Medicare Physician Fee Schedule (MPFS) payment. Columns are available to display the **Fee Type**, **PRO Fac Price (Professional Facility Schedule Payment)**, and **Fee Schedule Variance** (the difference between the CDM line item price and the Fee Schedule payment). In addition, columns for **APC Status Indicator** and the **MPFS Status Code** display. Export file name is Profee Schedule.

Questionable Revenue Code

This report includes all line items that have an assigned revenue code that does not match Vitalware's best practice suggestion. Clicking on the **CPT/HCPCS** code will open the bottom panel to show the **Rev Code** tab with suggested replacements. Export file tab name is Questionable Revenue Codes.

Reimbursable Drugs

This report provides a listing of all reimbursable drug codes included in the CDM file in the **Results** section of the screen. Clicking a **CDM charge code** or **CPT/HCPCS** will open the bottom panel of the screen and display the **Missing**

Reimbursable Drugs tab. This tab will display all reimbursable drug codes that are available and NOT included in the CDM file. Upon export of this report, a separate tab is generated as **Missing Reimbursable Drugs** that serves as a companion document. Export file names are Reimbursable Drugs and Missing Reimbursable Drugs.

Reimbursable Items/Services

This report includes a listing of all reimbursable, non-surgical CPT/HCPCS codes included in the CDM file in the **Results** section top panel of the screen. Clicking on a **CDM** charge code or **CPT/HCPCS** will open the bottom panel of the screen and show the **Missing Reimbursable Items/Services** tab. This tab will show all reimbursable, non-surgical CPT/HCPCS code items/services that are available and NOT included in the CDM file. These items/services should be considered for future addition to the CDM. When exported, a separate tab is generated as **Missing Reimbursable Items** that serves as a companion document. Export file names are Reimbursable Items and Missing Reimbursable Items.

Revised Description

This report includes all line items in the CDM that have had a change to the long description from the previous quarter and based on the date of the file analysis. Clicking on the **CPT/HCPCS** code will open the bottom panel to display the **Code Detail**. The **Revision History** tab is available to display long, medium and short description detail for each Start/End period. Export file name is Revised Description.

SAF Peer Data Analysis

This report displays pricing information obtained from the SAF data file published by CMS. Under the **Tools** menu, select **Analysis Details**. You can select up to 20 hospitals to be included in the analysis process. This report will display the average charge by CPT/HCPCS, by hospital (if the SAF data contains at least five billing occurrences for the comparison hospital). The report includes a total average price per CPT/HCPCS, a calculated variance amount, the percent of variance between the price in the CDM file and the total combined weighted average price of all hospitals selected. Professional revenue codes of 960-989 are excluded from this report due to SAF data being specific to facility charges. If an export is needed, the SAF Peer Data Analysis must run separately, then exported. This report is not included in the All CDM Line Items analysis export document. Export file name is SAF Peer Data Analysis.

Status Indicator and/or Payment Change

This report lists all CDM line items where the CPT/HCPCS code status indicator that has either changed payment amount or the status indicator changed (for example, K to N) when comparing the current quarter to the previous quarter. Export file name is Status Indicator Payment Change.

Payer File Analysis Reports

Payer File Analysis reports include all reports in the Hospital Medicare Analysis with the addition of the two reports detailed below.

Payer Fee Schedule Payment

This report lists the payer price, the variance between the payer price, the CDM price designated in the analysis definition and the payer variance percent.

Not Recognized by Payer Analysis File

This report lists any line item in the CDM file containing a CPT/HCPCS code that is NOT listed in the payer fee schedule file. The report provides the ability to research why certain codes were not included in the payer file uploaded into VitalCDM.

Physician Medicare Analysis Reports

Analysis Summary

This report provides summary counts for three summaries, based on the first analysis selected in the left panel and summary counts for exceptions found in the analysis process of the CDM file. Summary counts do not include inactive and excluded items. From this report, you can click the hyperlink counts and review report details. Export file name is Summary.

All CDM Line Items (Prior to Analysis)

This report contains all line items that have been imported into Vitalware. No analysis has been performed on this report. Export file name is All CDM Items.

All CDM Line Items (With Analysis)

This report contains all line items that have been imported into Vitalware with an analysis applied. The counts may be different in this report than in the **All CDM Line Items – Prior to Analysis** report as there are lines that do not fall onto any analysis report criteria. When exported, all individual reports appear in the selection drop down box except the **Pricing Analysis**, **SAF Peer Data Analysis**, and **All Excluded CDM Line Items** are available on one document with multiple tabs. Listed below each report are tabs that appear on the export document. Export file name is All CDM Items.

All Excluded CDM Line Items

This report contains all line items that have been previously excluded and do not appear in any analysis reports. If an export is needed, the **ALL Excluded CDM Line Items** must run separately, then exported. This report is not included in the **All CDM Line Items** analysis export document. Export file name is All Excluded Items.

Deleted CPT/HCPCS Codes

This report displays all items that have been deleted according to the date entered into the CDM file analysis process. If a replacement code exists, a column is available for display that will denote one. This column will include true/false information; a response of true indicates a replacement code will be displayed in the Suggested Codes tab in the lower portion of the screen when a CPT/HCPCS code from the report is selected. Additionally, if **Refer to Code(s)** exist, a column is available for display that will denote that these codes are available. This column will include true/false information; a response of true indicates that Refer to Code(s) are available and will be displayed in the Suggested Codes tab, appearing in the lower portion of the screen when a CPT/HCPCS code from the report is selected. Information on whether the codes already exist in the CDM file will also be displayed. Export file names are No Replacement CPT-HCPCS, Replaced CPT-HCPCS and Refer -To CPTHCPCS.

Excluded from MPFS Payment (SC E)

This report contains all CPT/HCPCS codes that have a MPFS Status Code E. Payment for these items, when covered, continues under reasonable charge procedures. Export file name is Excluded MPFS (SC E).

Invalid CPT/HCPCS Codes

This report shows all line items with CPT/HCPCS codes that are found to be invalid and unbillable. Export file name is Invalid CPT-HCPCS.

Invalid Modifiers

This report displays all line items with a modifier that is invalid and unbillable. Export file name is Invalid Modifiers.

Invalid Revenue Codes

This report displays all line items with revenue codes that are found to be invalid and unbillable. Export file name is Invalid Revenue Codes.

LCD/NCD

This report displays all CPT/HCPCS that are listed in a Local Coverage Determination (LCD) or National Coverage Determination (NCD) based on Medicare Part B rules from the MAC. This report is useful in determining which codes in the CDM file need to meet medical necessity and possibly obtain an Advance Beneficiary Notice (ABN). Export file name is Codes with Policy.

Medicare Code Options

This report provides a listing of all codes in their CDM that Medicare requires or suggests a different code to be billed in place of the code in the CDM. Clicking on the CDM charge code or CPT/HCPCS code will open the bottom panel to display the Suggested Codes tab and the linked information along with a notation in the last column of any CDM numbers that list the code. In addition, click on the Medicare Crosswalk tab in the bottom panel, then click on the CPT/HCPCS alternate code for more detail. Another top panel will appear and display that code. In the bottom panel, the Add On tab will display a list other CPT/HCPCS codes that may be billed in addition to the primary code, if applicable. Export file name is Has Medicare Crosswalk and Medicare Crosswalk.

Missing Primary/Add-On Codes

This report lists any line item in the CDM file that contains a missing primary code or a missing add-on code within the same department. Clicking on the CDM charge code or the CPT/HCPCS code will open the bottom panel and show the Suggested Codes tab and additional tabs (e.g., Medicare Crosswalk and Add On) for more detail and to view missing primary and/or add-on codes within the same department. When exported, a separate tab is generated as Missing Related Detail that serves as a companion document. Export file name Missing Related and Missing Related Detail.

Non-Covered by Medicare (SC-N)

This report contains all CPT/HCPCS codes that have MPFS Status Code N. Export file name Not Covered MPFS (SC-N).

Not Recognized by Medicare (SC I)

This report displays all CPT/HCPCS codes that have a MPFS Status Code I. These codes are not recognized by Medicare for reporting services or payment, but an alternate code may be available. Export file name is Not Recognized MPFS (SC I).

PRO FAC Status Code Change and/or Payment Change

This report lists all CDM line items where the CPT/HCPCS MPFS status code has either changed payment amount and/or the status code changed (e.g., K to N) when comparing the current quarter to the previous quarter. Export file name is Status Code Payment Change.

PRO Office Fee Schedule Payment

This report displays all items that are subject to the Medicare Physician Fee Schedule (MPFS) payment. Columns are available to display the Fee Type, PRO Fac Price (professional facility schedule payment) and Fee Schedule Variance (the difference between the CDM line item price and the Fee Schedule payment). In addition, columns for APC Status Indicator and the MPFS Status Code display. Export file name is Profee Schedule.

Revised Description

This report includes all line items in the CDM that have had a change to the long description from the previous quarter and based on the date of the file analysis. Clicking on the **CPT/HCPCS** code will open the bottom panel to display the Code Detail. The Revision History tab is available to display long description detail for each Start/End period. Export file name is Revised Description.

Statutory Exclusion (SC-X)

This report includes all CPT/HCPCS codes that have a MPFS Status Code X. These codes represent an item or service that is not in the statutory definition of "physician services" for fee schedule payment purposes. Payment may be made under another type of Fee Schedule. Examples include ambulance services, clinical diagnostic laboratory services, DMEPOS, etc. Export file name Statutory Exclusion (SC X).

NDC Analysis Reports

Analysis Summary

This report resides in a separate tab of the center report interface. It provides summary counts for three summaries, based on the first analysis selected in the left panel and summary counts for exceptions found in the analysis process of the CDM file. Summary counts do not include inactive and excluded items. From this report, you can click the blue hyperlink counts and review report details. Export file tab name: Summary

All CDM Line Items

This report contains all formulary line items that have been imported into Vitalware's system. No analysis was done for this report. When an analysis is applied, the counts may be different as there are lines on the **All CDM Line Items** report that potentially do not fall onto any analysis report. Export file tab name is **All CDM Items**.

All Excluded CDM Line Items

This report contains all line items that have been previously excluded and do not appear in any analysis reports. If an export is needed, the ALL Excluded CDM Line Items must run separately, then exported. This report is not included in the All CDM Line Items analysis export document. Export file tab name is **All Excluded Items**.

Bill Unit Variance

This report allows you to compare the bill units from analysis of your NDC/HCPCS during NDC analysis to the bill units in your CDM file. The report identifies if bill units in your CDM file do not match the NDC and CPT/HCPCS combination. The report also identifies if bill units are missing from your CDM file, but are applicable according to the NDC and CPT/HCPCS combination.

Cost to Charge Analysis

This report calculates the variance amount and percent of variance between the cost and charge/price fields. The report can be filtered and sorted as needed.

Description Review

This report displays a list of line items and their descriptions that have a valid NDC code. This report also includes the NDC description as well as the CPT/HCPCS code and description. Clicking the **CPT/HCPCS** or the **NDC code** opens the Code Detail panel. This report can be used to compare the CPT/HCPCS and NDC descriptions to the file description for inconsistencies. Additionally, from the **Columns Available** option, the **NDC data set** information including the Labeler Name, ASP Price, Pkg Size, Bill Units, Bill Pkg, SD/MD per each, SD/MD per pkg and Route of Administration (ROA) is available to display within the table. Export file tab name is **Description Review**.

Invalid NDC Code

This report displays a list of lines items that are not included in Vitalware's VitalKnowledge database. Review NDC format to ensure labeler and other drug specific detail is accurate and includes leading zeroes if required. Export file tab name is **Invalid NDC**.

NDC APC Payment

This report displays a list of line items that have valid NDC and CPT/HCPCS code combinations. Additional NDC specific columns will be available for display when selected. The **ASP Allowable** tab amounts are calculated using the **ASP pricing plus** 6% times the billable units for the specific **NDC** and **CPT/HCPCS code combination**. The variance and the variance percentage are then calculated using the charge amount listed in the file and the **APC payment amount**. The **ASP Price Limit** tab is the payment limit amount based on CMS ASP pricing files and may be the same as the APC payment amount depending on the Status Indicator assigned to the CPT/HCPCS code. CPT/HCPCS codes with a Status Indicator N are not included on this report. Clicking on the CPT/HCPCS code will open the bottom panel to display the **APC Info** tab. Export file tab name is **NDC APC Payment Exception**.

NDC No Longer Manufactured

This report includes all line items with NDC codes that are out of date. It has two additional columns: **NDC Eff Date** (the date the NDC was effective) and **Mfg End Date** (the date the manufacturer ceased manufacturing this NDC). Export file tab name is **NDC No Longer Manufactured**.

NDC Pricing Analysis

This report displays a list of line items in the file that have a valid NDC and CPT/HCPCS code combination in Vitalware's best practice suggestions. This report will also display columns for Average Sales Price (ASP), Average Wholesale Price (AWP), Status Indicator, etc. Additional NDC specific columns will be available for display when selected. Export is not available for this report.

NDC Self Administered Drugs

This reports displays a list of self-administered drugs. It includes three additional columns:

- **ROA**. Includes the Route of Administration data.
- **SAD Description**. Shows the description of the Self Administered Drug indicator for items that have a numeric result in the SAD Indicator column.

- **SAD Indicator**. Shows the numerical Self Administered Drug indicator (None, 0, 1, 2, or 3).

NDC to CPT/HCPCS Mismatch

This report displays a list of line items that have a missing or improper CPT/HCPCS code as related to the NDC code in the CDM file. Clicking on the CDM charge code, CPT/HCPCS (if present) or the NDC in the **Result** panel will open the bottom panel to show **Suggested Codes** and **NDC** tabs. These tabs will display CPT/HCPCS codes that are associated with the NDC. Export file tab name is NDC HCPCS Mismatch.

Suggested Rev Code Assignment

This report displays a list of line items that are missing a CPT/HCPCS code associated with the NDC and/or have a CPT/HCPCS combination that do not match Vitalware's best practice suggestions for revenue code assignment. In the bottom panel, the **Suggested Codes** tab list the revenues codes and CPT/HCPCS that are associated with the NDC. When exported, a separate tab is generated as **Suggested Rev Codes** that serves as a companion document. Export file tab name is Revenue Codes Assigned and Suggested Revenue Codes.

Supplies Analysis Reports

All CDM Line Items

This report contains all line items that have been imported into VitalCDM. No analysis has been performed on this report. Export file name is All CDM Items.

All Excluded CDM Line Items

This report contains all line items that have been previously excluded and do not appear in any analysis reports. If an export is needed, the **ALL Excluded CDM Line Items** must be run separately and then exported. This report is not included in the **All CDM Line Items** analysis export document. Export file name is All Excluded Items.

Cost to Charge Analysis

This report calculates the variance amount and percent of variance between the cost and charge/price fields. The report can be filtered and sorted as needed.

Deleted CPT®/HCPCS Codes

This report displays all items that have been deleted according to the date entered into the CDM file analysis process. If a replacement code exists, a column is available for display that will denote one. This column will include a true/false indicator; a response of true indicates a replacement code will be displayed in the **Suggested Codes** tab in the lower portion of the screen when a **CPT/HCPCS** code from the report is selected.

Additionally, if **Refer to Code(s)** exist, a column is available for display that will denote that these codes are available. This column will include a true/false indicator; a response of true indicates that **Refer to Code(s)** are available and will be displayed in the **Suggested Codes** tab, appearing in the lower portion of the screen when a **CPT/HCPCS** code from the report is selected. Information on whether the codes already exist in the CDM file will also be displayed. Export file names are No Replacement CPT-HCPCS, Replaced CPT-HCPCS, and Refer -To CPTHCPCS.

Invalid CPT/HCPCS Codes

This report displays all line items with CPT/HCPCS codes that are found to be invalid and unbillable. Export file name is Invalid CPT-HCPCS.

Invalid Revenue Codes

This report displays all line items with revenue code that are found to be invalid and unbillable. Export file name is Invalid Revenue Codes.

Suggested HCPCS Code Assignment

This report compares supply items in your file to a referential supply data set, and displays a match certainty to clearly identify items that are confidently matched to referential data. It also displays suggested HCPCS codes for supplies at all levels of matching. Users will benefit from working highest accuracy matches first.

We use the following ranges for determining certainty of a match:

- **Uncertain**: 15-70% match
- **Fairly certain**: 70%-90% match
- **Certain**: 90-99% match
- **Exact match**: 100% match

> **Note**: We use multiple fields and some comparative algorithm to try to match CDM items to the referential data. Matching text in this manner is not an exact science, and as such we expect some variability.

Suggested Rev Code Assignment

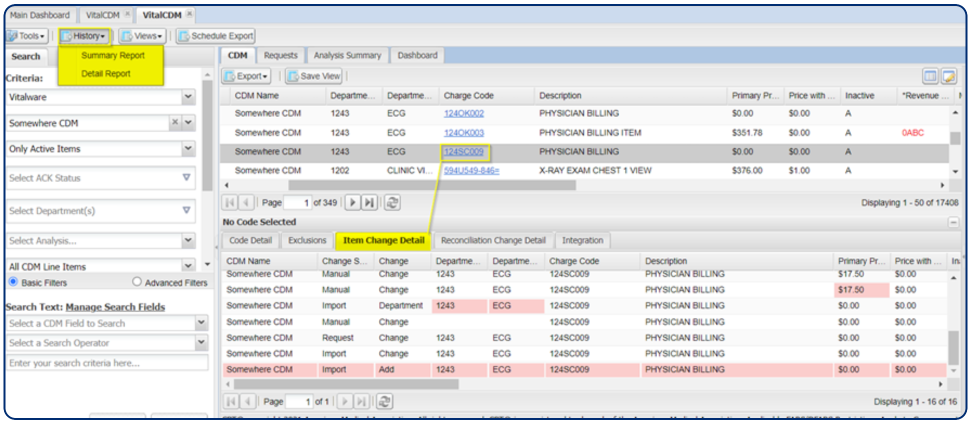
This report shows possible revenue code mismatches in comparison to assigned HCPCS.

History Tracking in VitalCDM

Within VitalCDM, you can view either a **Summary History Report** or a **Detailed History Report**. The Summary History Report displays the current version of the records in comparison to the last known version whereas the Detailed History Report shows each version of the record within the specified time frame.

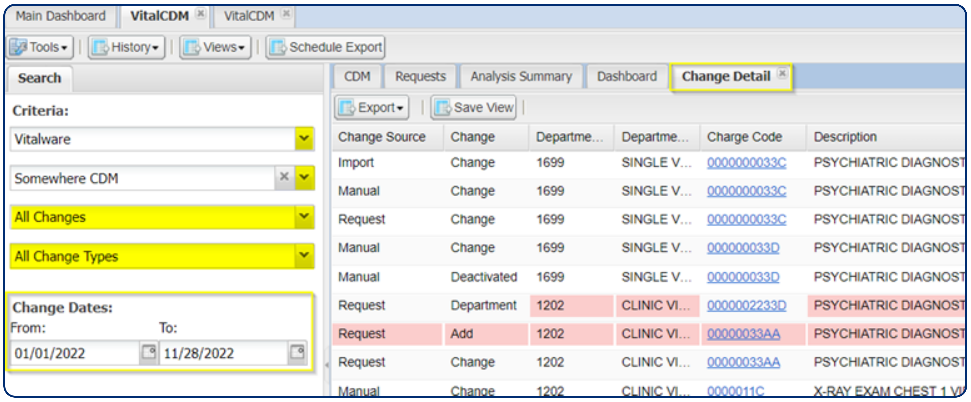
Accessing the History Reports

When in VitalCDM, select the **History** drop-down in the top left corner and open either the **Summary Report** or the **Detail Report**. The Detail History Report for a record is also available in the **Item Change Detail** tab of the lower panel.



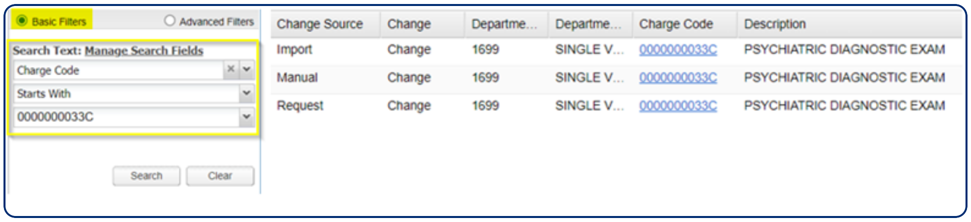
Navigating the History Reports

After selecting the preferred Entity/CDM you can filter from **All Changes** to a particular change method (**Request**, **Manual**, or **Import**) or from **All Change Types** to either **Adds**, **Changes**, or **Deactivations**. Additionally, you can filter to a specified time frame for auditing and reporting purposes.

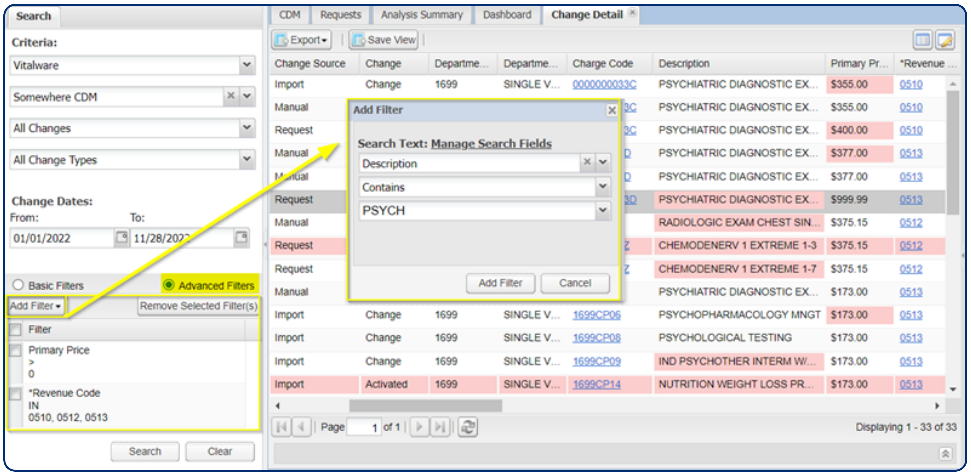


The Basic and Advanced Filters allow you to search the CDM data in the grid. The **Basic Filters** allow for a single search whereas the **Advanced Filters** allow for more than one entry of criteria to be entered.

Basic Filters:

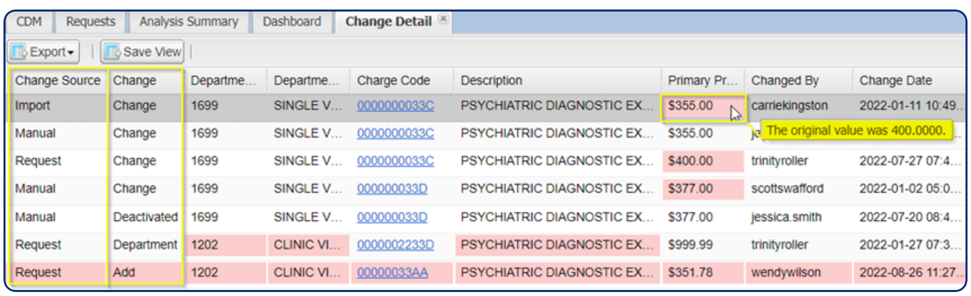


Advanced Filters:



Viewing the History Results

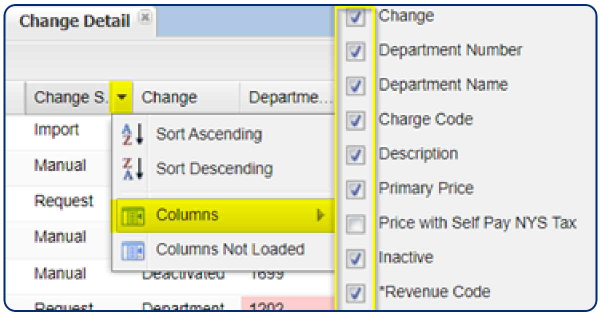
Within the results grid, you can see the source and type of change as well as the specific fields impacted based on the pink shading - new adds would display as a pink row. You can hover over any of the highlighted cells and view what the original value was.

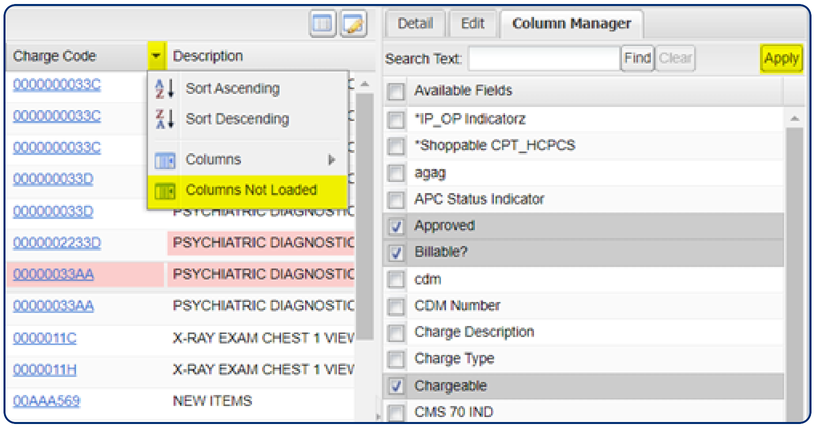


Additional fields used for auditing: Who made the changes and when (Changed By, Change Date) Requestor, Notes, etc are also available in the far right of the grid.

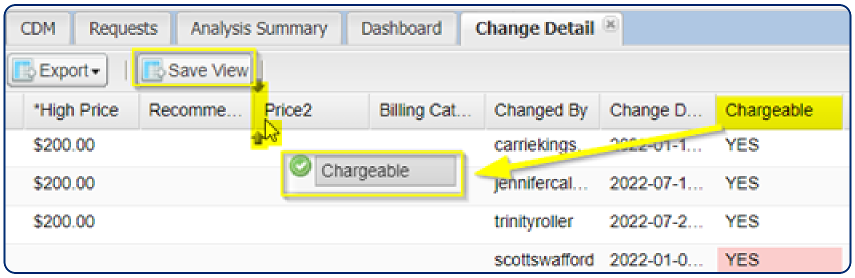
Customize and Save Views

When hovering over any column header a dropdown arrow will appear allowing you to sort by that field, adjust the columns that are currently displaying, or access **Columns Not Loaded**.





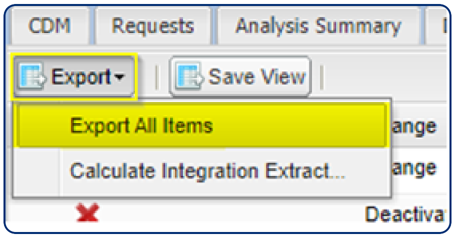
After adding or removing columns you can customize your view by dragging and dropping the columns into your preferred order and saving that view.

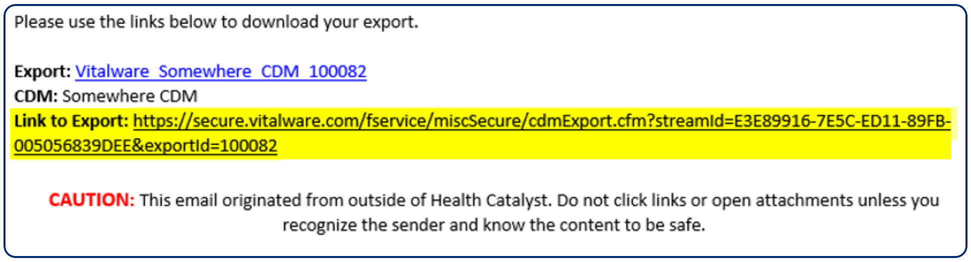


Note: When saving your view, it will also hold the dates in the left panel which may need to be adjusted during your next use or prior to using scheduled exports.

Exporting the History Reports

You have the option to export this report into an Excel Document. Click on Export in the upper left-hand corner of the results panel and select **Export All Items**. You will receive an email from vw-support@healthcatalyst.com when your export is ready for download.




Please use the links below to download your export.

Export: Vitalware_Somewhere_CDM_100082
CDM: Somewhere CDM
Link to Export: https://secure.vitalware.com/fservice/miscSecure/cdmExport.cfm?streamId=E3E89916-7E5C-ED11-89FB-005056839DEE&exportId=100082

CAUTION: This email originated from outside of Health Catalyst. Do not click links or open attachments unless you recognize the sender and know the content to be safe.

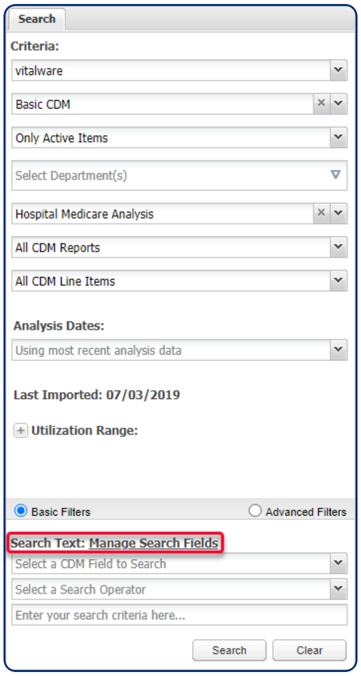
For assistance accessing the History Reports, please contact your Client Success Manager at vw-cs@healthcatalyst.com.

Suggested Report Maintenance Schedule

Yearly	Monthly	Quarterly
• Pricing Analysis • SAF Peer Data Analysis	• Deleted NDC • NDC Analysis • Suggested Rev Code Assignment • Description Review • NDC APC Payment • Invalid NDC • Pricing Analysis • NDC to HCPCS Mismatch • Medicare Code Options • Reimbursable Drugs • APC Payment • FAC Fee Schedule Payment • PRO Fee Schedule Payment • Invalid Modifiers • Duplicate CPT/HCPCS • Invalid CPT/HCPCS Codes	• Deleted Codes • Revised Description • Status Indicator and / or Payment Change • Missing Primary / Add-On Relationships • Device Codes • Device Relationships • Invalid Revenue Codes • Questionable Revenue Codes • Reimbursable Items / Services • Not Billable to Medicare Payer (SI M) • Not Recognized by Medicare (SI E) • Not Recognized by OPPS (SI B)

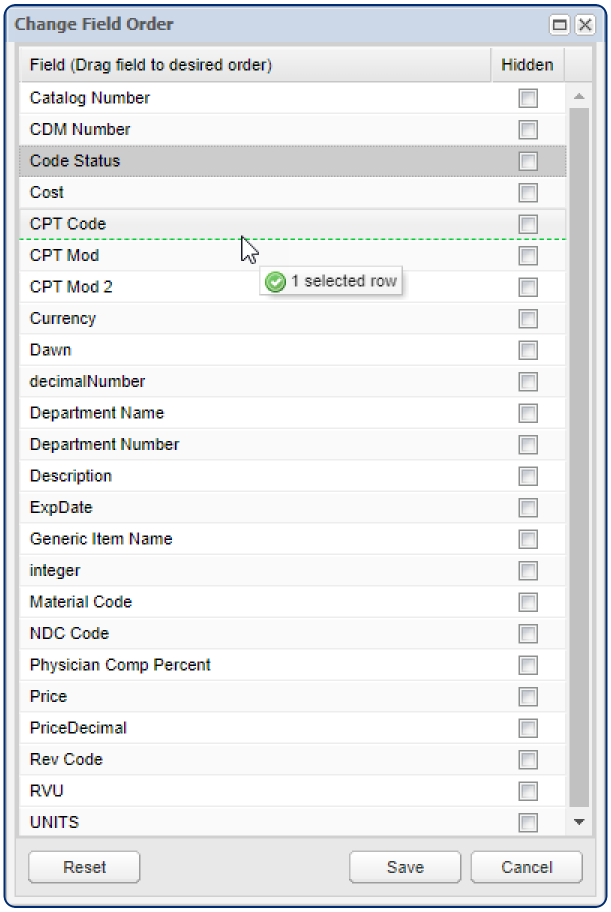
Manage Search Fields

Sometimes a CDM file has a large number of fields to select from via the **Select a CDM Field to Search** drop down menu. To customize the order of this list and move frequently used fields to the top, select **Manage Search Fields**.



A window enables you to hide fields from the filter list on the box under the **Hidden** column.

To rearrange fields, drag and drop the field to the location in the field list. Once your changes are made, click **Save**.



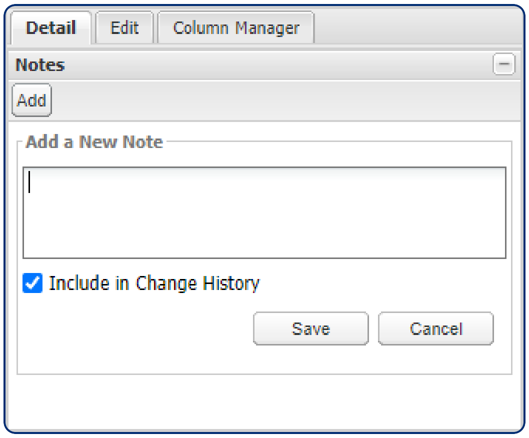
User Interface Icons

In the upper right corner of the report interface, icons are available to allow edits and additional options for each line item. Clicking any of the icons will open a panel on the right side of the report interface.

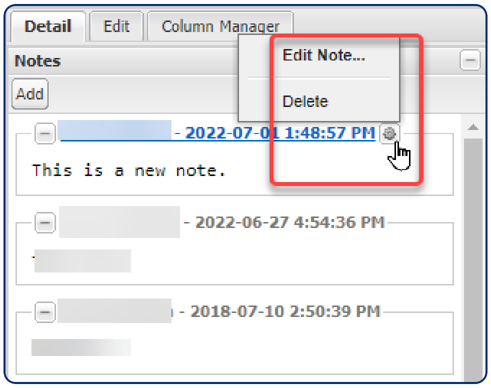
Detail Tab

Click this icon  to open the **Detail** tab. Notes and attachments can also be added here.

Notes: You can add notes for each line item in the CDM file. Selecting a line item from the results table, the right side of the screen includes a section titled **Notes**. Select the add icon to enter a note. All notes are user date/time stamped. Notes can also be included in **Change History** by checking the box next to **Include in Change History**.



You can edit or delete your own notes, but not the notes of other users.



Edit Tab

 Selecting this icon opens the **Edit** tab.

> **Note**: Users assigned to the role of **CDM Editor** will see this icon. Users with **Standard Access** will not see this icon.

The Edit tab is where you view and edit line item details.

If you are a member of the **CDM Editor** role, you can make updates to line items by clicking in the cell in the Edit Panel, making the updates, and clicking **Save**.

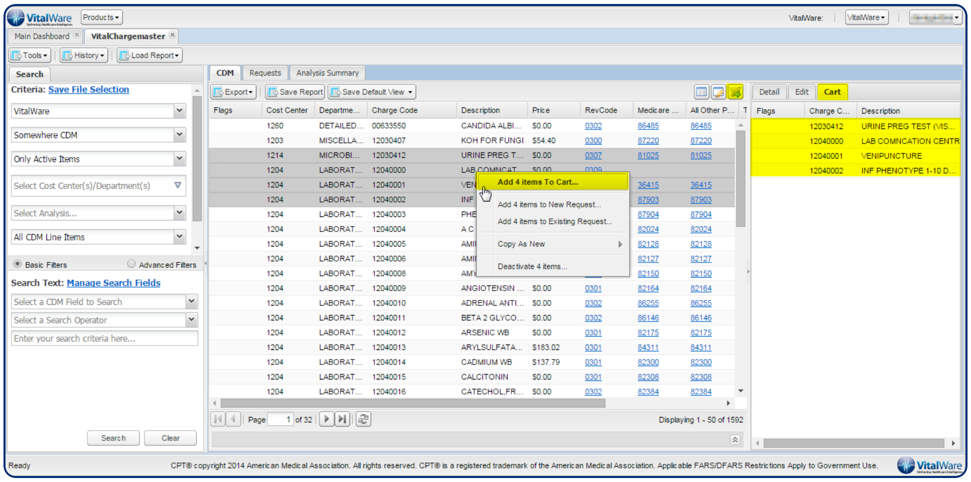
Hovering over a blue question mark will show a **tooltip**.

Cart Tab

 Selecting this icon opens the Cart tab.

The **Cart** tab is where you add items to your **Cart** by selecting items from one or more reports and then right-clicking the item and selecting **Add Items to Cart**.

The **Cart** is essentially a storage area where you can store items for later purchase. See the **Workflow** chapter of this user guide for more details on adding items from the **Cart** to a **Request** form.



Icons/Flags

Depending upon the details saved in relation to individual line items, the icons below may or may not be visible within the **Report** interface in the flags column.

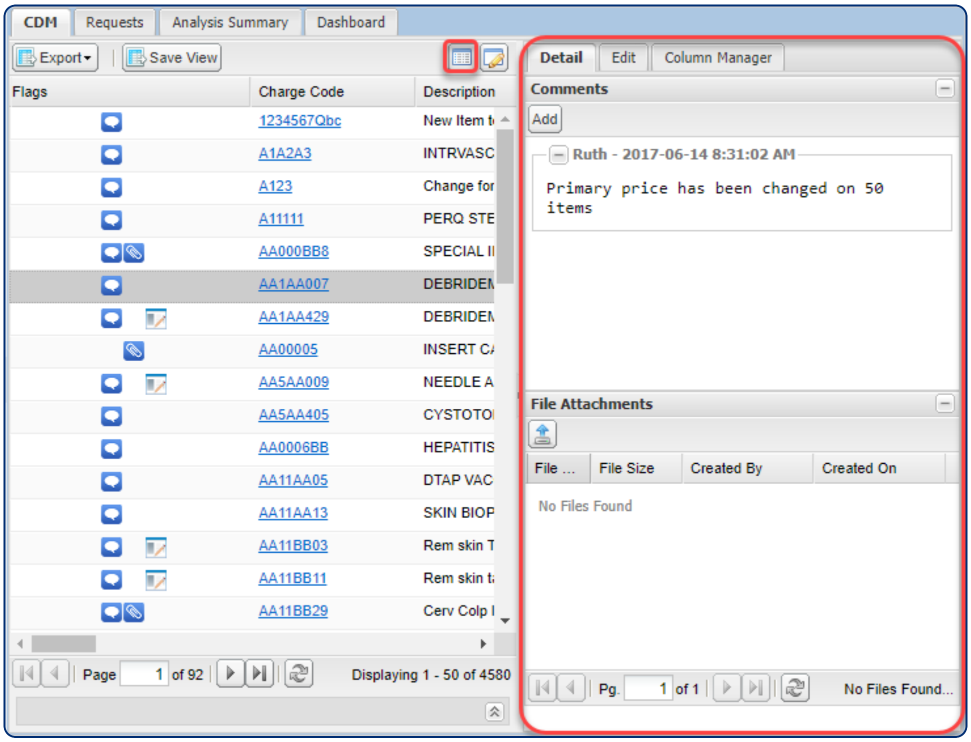
 Integration is pending

 Item has been deactivated

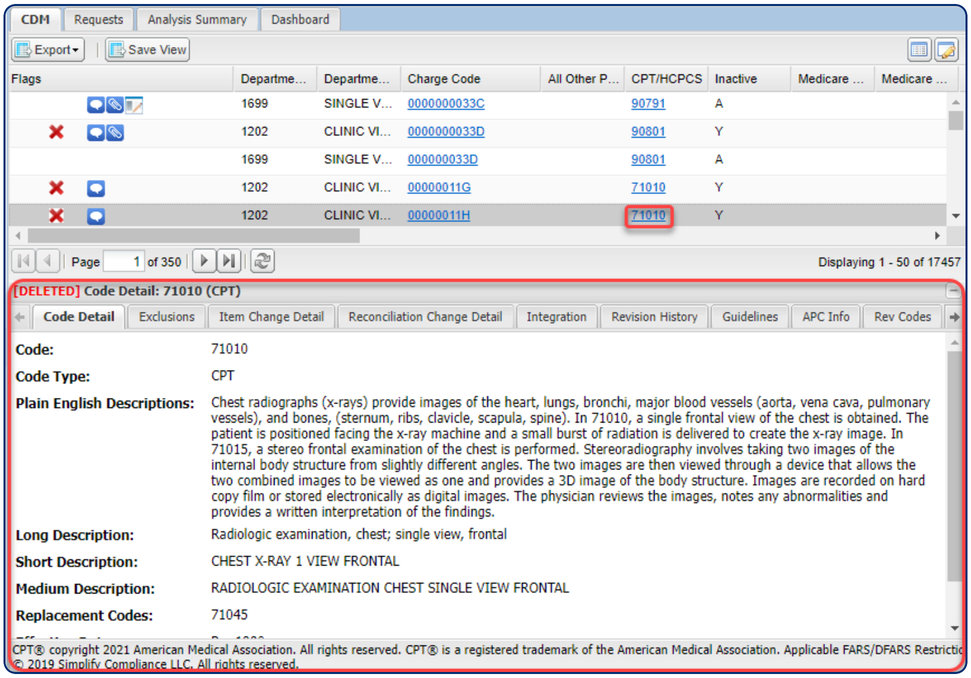
 Item contains one or more notes

- Item contains one or more attachments
- Item has an active request pending
- Item has been excluded from the report that is being viewed
- Reconciliation data is pending

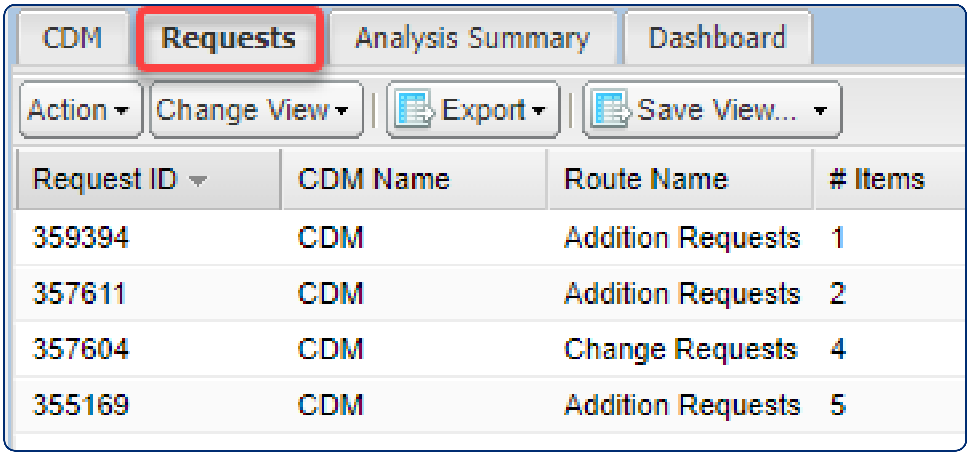
Click the **View Item Detail** button. The **Detail** tab will open to the right of the **report** interface.



Information related to the excluded items can be viewed in the Code Detail pane by clicking on the blue underlined codes.



Information related to requests can be viewed in the **Requests** tab.



Line Items - Additional Functionality

In VitalCDM, you can access additional functionality by right-clicking a line item.

Options for Entities Not Using Workflow include:

- Change Items Manually (Edit Panel)
- Add items Manually (Edit Panel)
- Deactivate Items

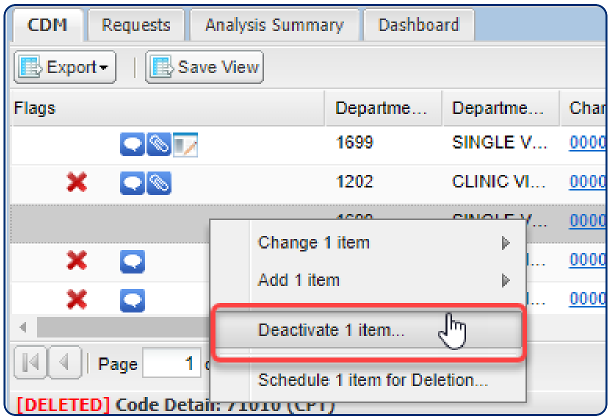
- Schedule Items for Deletion
- Exclude Items from Current Report
- Exclude Items from All Reports

Options for Entities Using Workflow include:

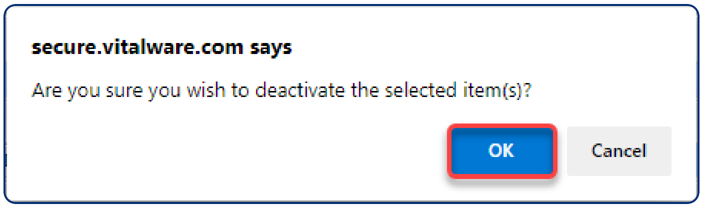
- Change items via New Request
- Change items via Existing Request
- Add items via New Request
- Add items via Existing Request

Deactivating Items

1. Right-click the line item in the **report table** to deactivate.
2. Click **Deactivate Item**.



3. Click **OK** to continue.



Copying an Item as a New Item

You can copy a single line item to the same or different department/cost center of the CDM file.

1. Right-click the line item to be copied within the **report table**.
2. Hover over **Add item** and select **Manually (Edit Panel)**.
3. Enter the number of items to create and if the item key/CDM number should be copied.
4. Click **OK** after you determine the number of items to create.
5. A pop-up window will open allowing you to modify or add information for the new line item. Mandatory fields are in red.
6. Information for each field is available by hovering over the blue question mark icon.
7. A key code field will be required and validated to ensure NO duplicate key code is entered.
8. After your information has been entered, click **Save** to add this new line item to the charge master.

Assigning Items to Cost Centers

For Cost Center based files, you can add items to one or multiple cost centers.

1. Right-click on an item and select **Cost Center Multi (#) Assign Item**. The number will reflect the number of items to assign to the cost center.
2. In the **Managing Cost Centers** window, select one or multiple cost centers where the item should be assigned.
3. Click **Apply Cost Center** to save.

Scheduling Items for Deletion

If you are a member of the of CDM Admin group, you can delete a line item from the CDM. Deleting a line item is a scheduled process that runs at **2:00 AM Pacific Daylight Time (PDT)** the following day.

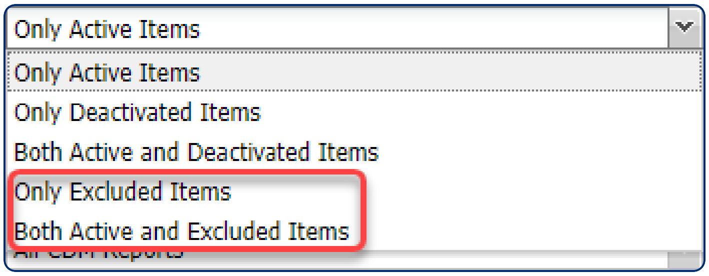
1. Highlight the items you want to delete, right-click and select **Schedule Item for Deletion**.

2. A **Schedule Delete of Item** window appears with a confirmation. Enter the designated word and click **Yes** to confirm. The item will show a icon to indicate the pending deletion.
3. You can undelete the item before the deletion process by right-clicking the item and selecting **Unschedule 1 Item for Deletion**.

Excluding Items from Analysis Reports

If you have permissions to exclude items from analysis reports, right-click each item to exclude from the current report or all reports. This process removes the item from the report but will not impact the **Analysis Summary** until the file has been analyzed again.

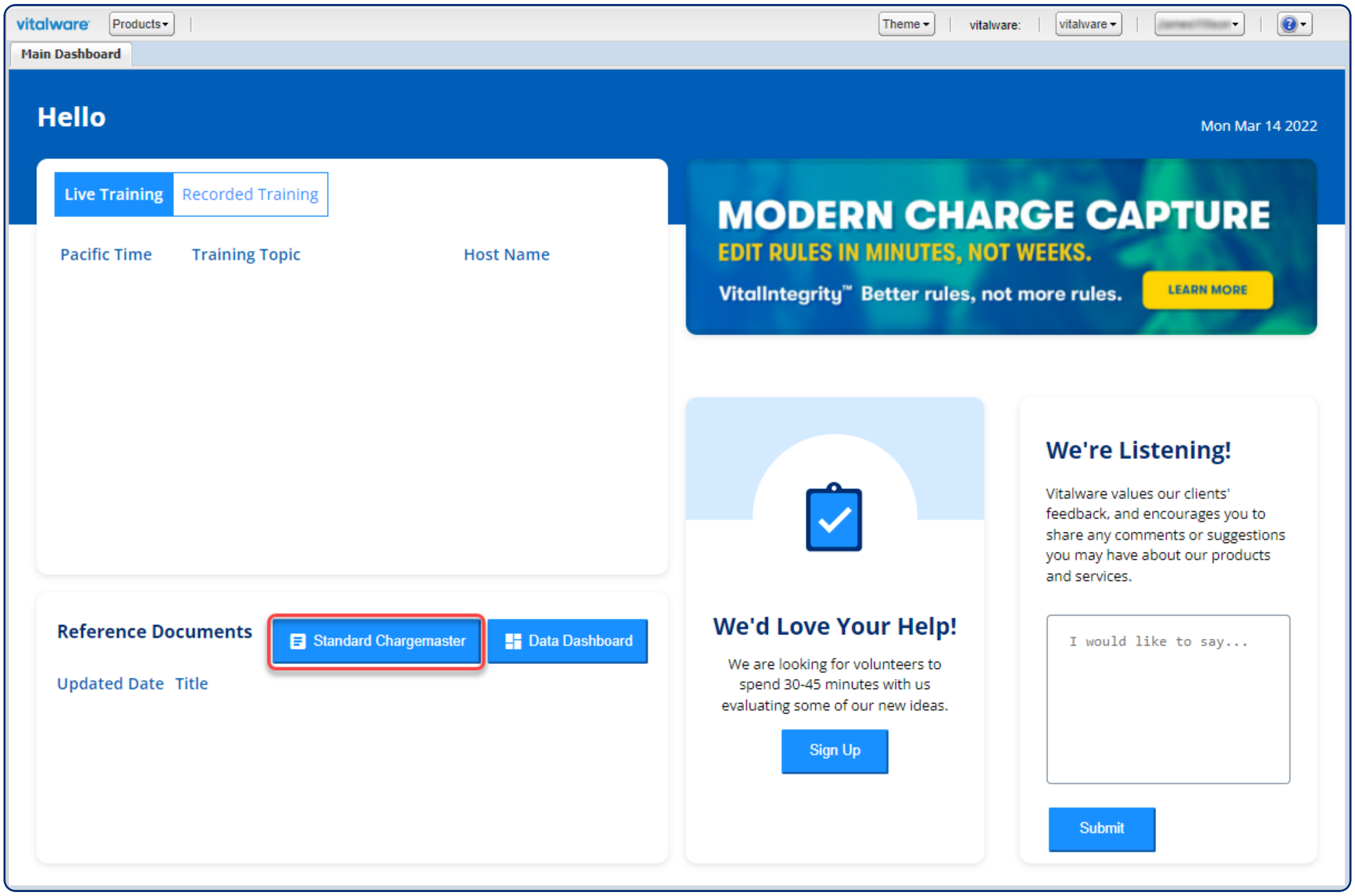
1. Highlight the items for exclusion and select the option to **Exclude Item(s) from Current Report** or **Exclude item(s) from All Reports.**
2. Click **OK**.
   - The item will be removed from the reports. This change will not be reflected in the analysis summary until the file has been analyzed again.
   - You can view excluded items by using the active items filter in the **search panel**.



Chapter 10: Managing Customized Workflow

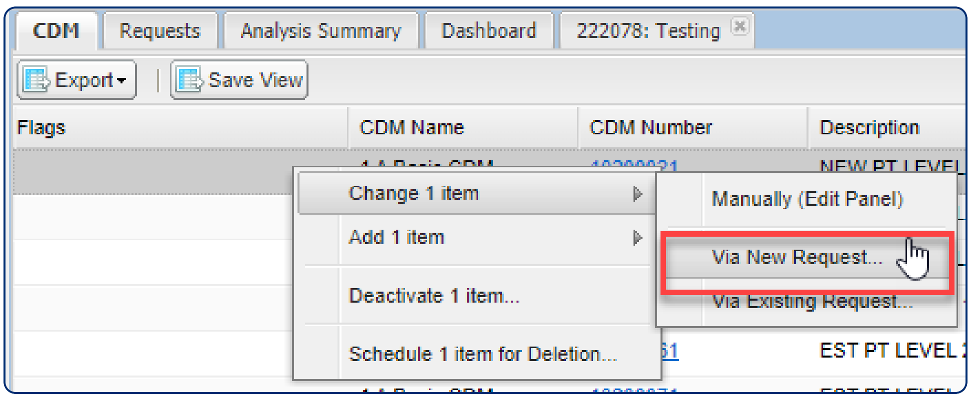
Workflow processes can be created, managed and updated in VitalCDM. Establishing defined workflow processes helps to ensure additions, changes, and deactivations to the CDM file are managed with accuracy.

You can download a standard chargemaster file as a reference when you are adding or changing items in your chargemaster. To download this file, go to the Vitalware Dashboard and click **Standard Chargemaster**.

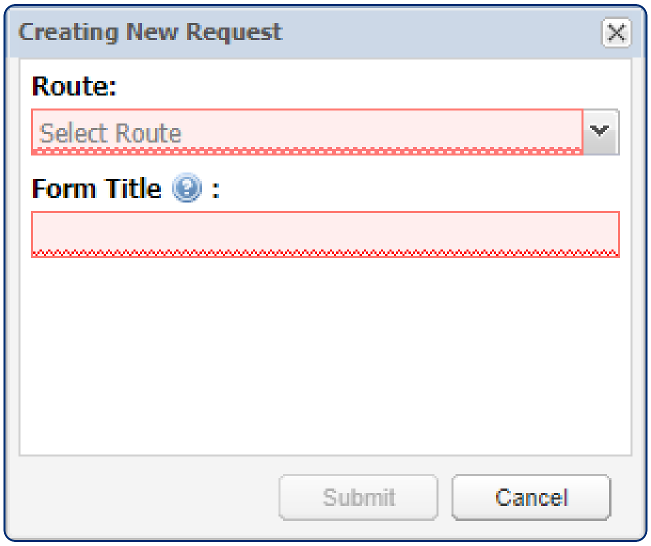


Requesting Modifications to Existing Line Items

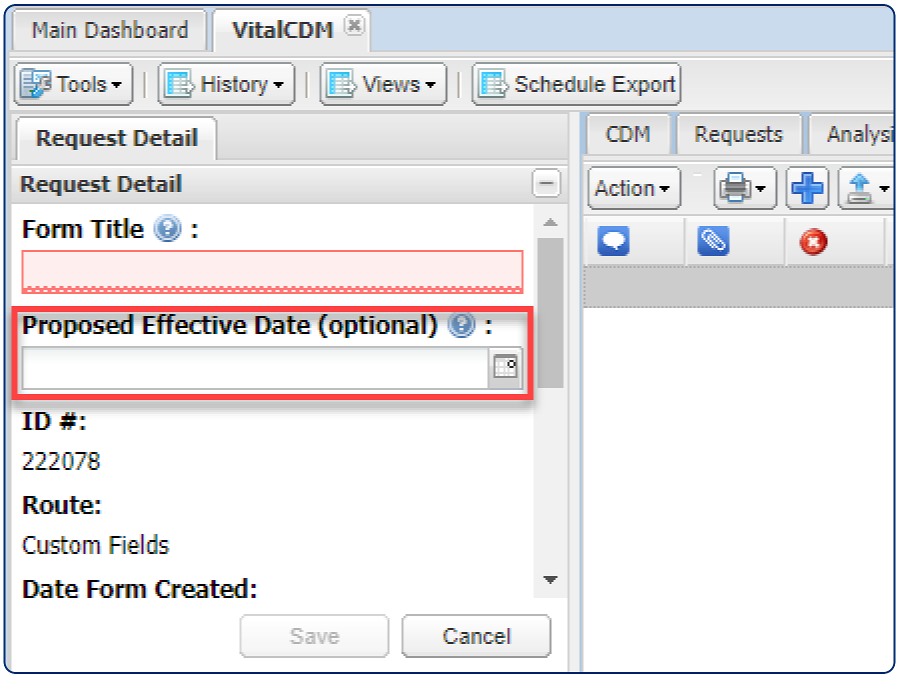
1. Select **Products** > **VitalCDM**.
2. The left panel is the **Search** tab with filter and search options. Once criteria have been defined, click **Search**. The report table is to the right of the **Search** panel.
3. The **Search** panel can be minimized by clicking the arrow located in the center of the dividing line between the Search panel and the report table.
4. Right-click the line item you want to add to a new request.
5. Hover over **Change Item** and click **Via New Request**.



6. Use the **Route** menu to select the appropriate request route. You only have access to the routes that have been assigned to you. This is a required field.
7. **Request Title**: Some organizations have specific naming conventions for request titles. Hovering over the blue question mark will allow you to view more details. This is a required field.



8. A new tab is visible showing the line item. You can continue working on the new request or you can click the **CDM** tab to continue reviewing the report table.
9. Optional: In the Request Detail tab, select a future effective date by using the **Proposed Effective Date** field. If no selection is made, the approved date the request was made is the effective date. Click **Save** to save your changes.



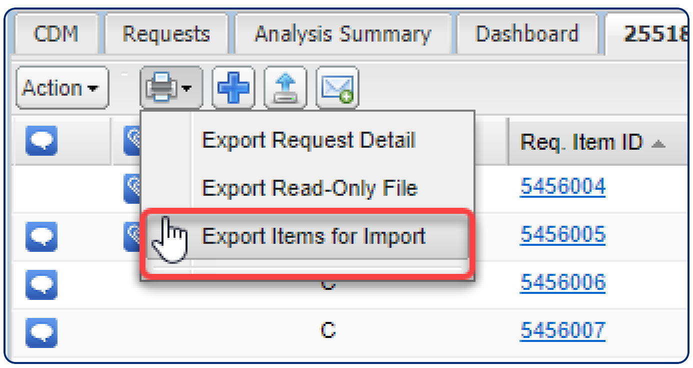
10. To continue processing the request, select the line item within the **Requests** tab. Selecting the line item will open the **Edit/Detail** panel on the right hand side.

Mid-Request Export/Import

You can export a request that is out of the **Draft** state, make edits using Microsoft Excel, and import those edits back into the request.

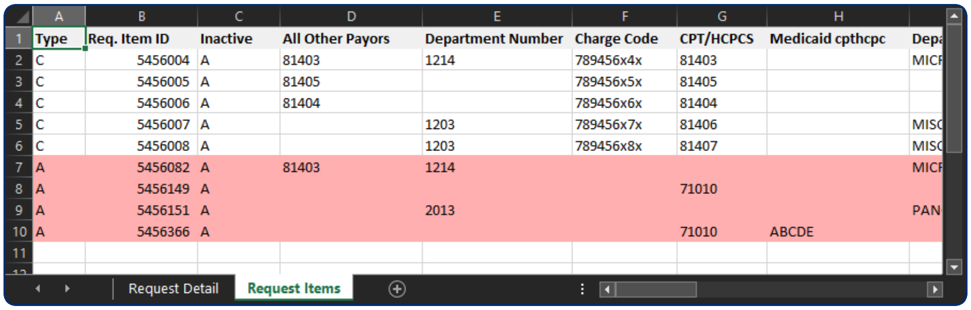
To use the mid-request export/import, do the following:

1. On the Requests tab, double-click the request you want to edit. The request must be out of the **Draft** state.
2. Click the **Printer** icon, and then select **Export Items for Import**.



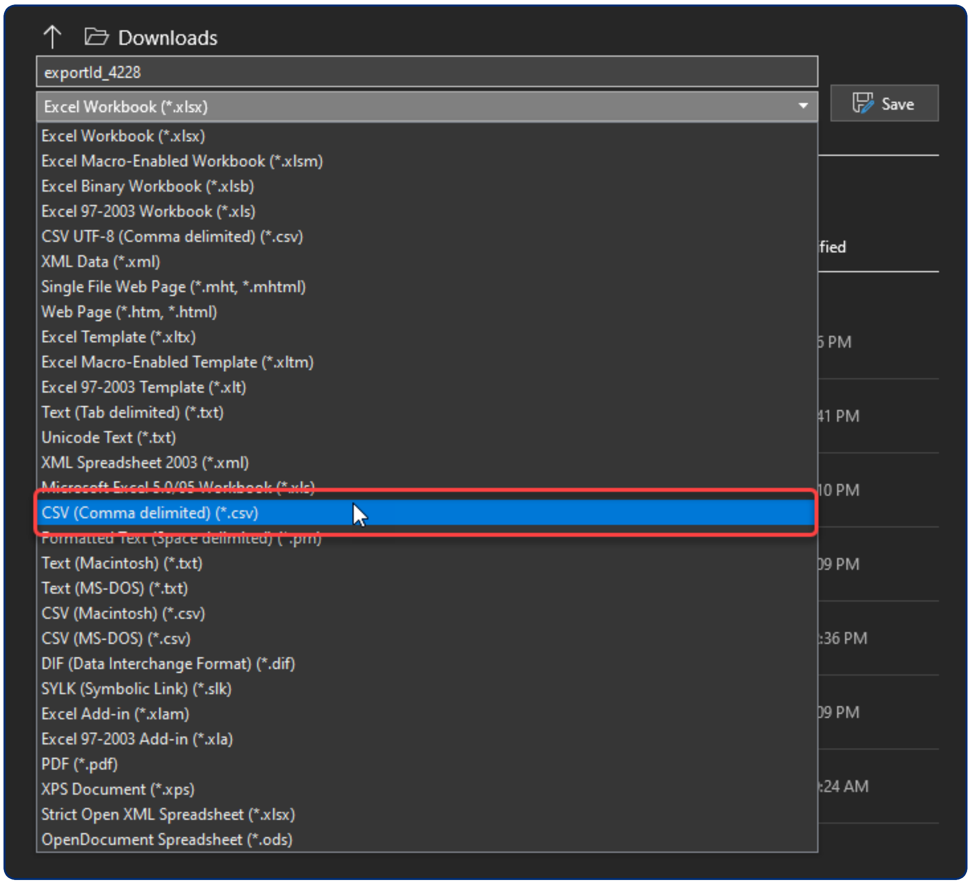
3. You will receive an email with a link to the exported Excel file. Click the link to download the file.
4. Open the file in Microsoft Excel, and edit the items on the **Request Items** sheet.

> **Note**: Do not alter the order of the columns in the spreadsheet.

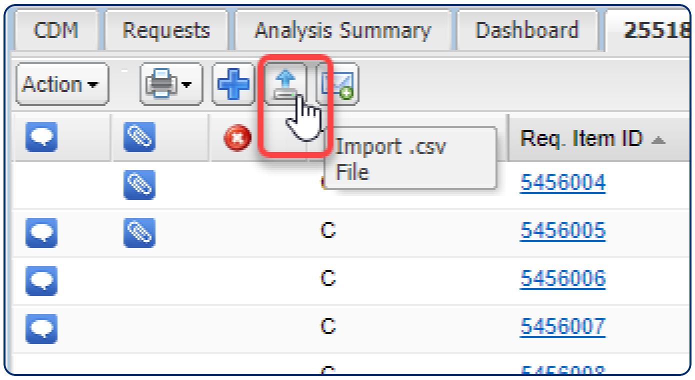


Type	Req. Item ID	Inactive	All Other Payors	Department Number	Charge Code	CPT/HCPCS	Medicaid cpthcpc	Depa
C	5456004	A	81403	1214	789456x4x	81403		MICF
C	5456005	A	81405		789456x5x	81405		
C	5456006	A	81404		789456x6x	81404		
C	5456007	A		1203	789456x7x	81406		MISC
C	5456008	A		1203	789456x8x	81407		MISC
A	5456082	A	81403	1214				MICF
A	5456149	A				71010		
A	5456151	A		2013				PAN
A	5456366	A				71010	ABCDE	

5. After you have edited the items, select **File** > **Save As**.
6. For the file format, select **CSV (Comma delimited) (*.csv)**.



7. In the request, click the **Import .csv File** button.



8. On the **Mid-Request Item Import** window, click the **Browse** button. Select your .csv file and click **Open**.
9. Click **Upload**.

10. Your changes will appear the next time you open the request.

Requesting New Additions to the Chargemaster

Creating a New Item Request

1. Select **Products** > **VitalCDM**.
2. Click **Requests** to open the **request table**.
3. Select **Action** and click **New Request**.
4. In the **Creating New Request** window, click **Route** and select the appropriate route.
5. Enter a title for the request in the **Form Title** field. Organization-specific details are available when hovering over the blue question mark.

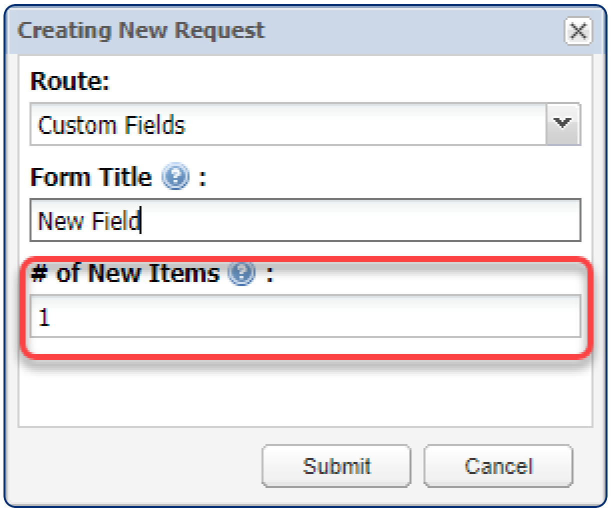
6. Click **Submit**. A new tab opens for the request. Data will not be populated in the table. To add new items to the request, click the **blue plus icon** to manually add new items.
7. All mandatory fields must be populated with data before you click **Save**.

Tip: You can add up to 50 new items to a request form.

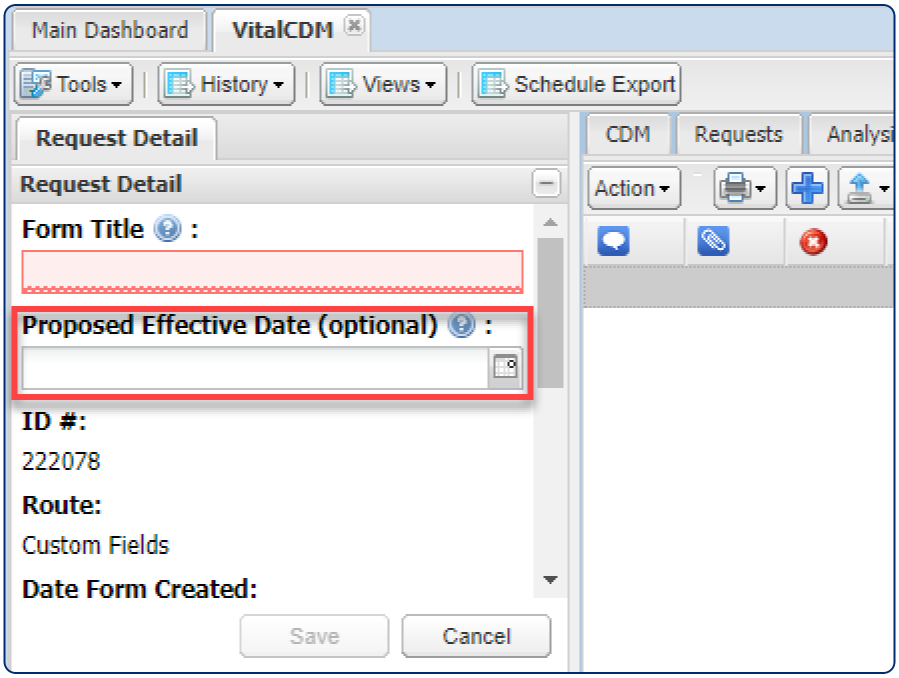
Requesting Additions From Report Results

When you right-click an item in the **CDM** tab, you can create a request for a new item that is a copy of an existing item.

1. The left panel is the **Search** tab with filter and search options. Once your criteria have been defined, click **Search**. The report table is visible to the right of the search panel. The search panel can be minimized by clicking the arrow in the center of the dividing line between the search panel and the report table.
2. Right-click on the line item within the **report table** to be copied.
3. Select **Add 1 item** > **Via New Request**.
4. Select whether you want to copy the item key and CDM number fields.
5. Select the **Route** (required field). You can only view the routes you have permissions to view.
6. Enter the form title.
7. Enter the number of new line items you want to create with this request. You can create multiple request line items with the same values.



8. Click **Submit**.
9. **Optional**: On the *Request Detail* tab, you can select a future proposed effective date by clicking the **Proposed Effective Date** field. If a date selection is not made, the date the request was approved is the effective date.



10. You can continue working on the new request or click the **CDM** tab to continue reviewing the report table.

Requesting Deactivation of Existing Line Items

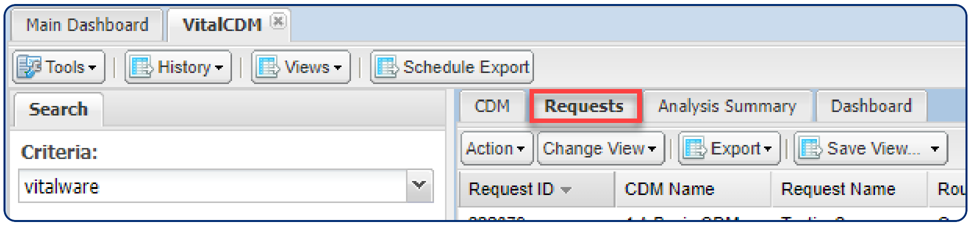
1. Select **Products** > **VitalCDM**.
2. The left panel shows the **Search** tab with filter and search options. Once criteria have been defined, click **Search**. The report table is visible to the right of the search panel. The search panel can be minimized by clicking the arrow in the center of the dividing line between the search panel and the report table.
3. Right-click the line item you want to request deactivation on.
4. Hover over **Change Item** and click **Via New Request**.
5. Click **Route** to select the appropriate request route. You will only have access to view the routes you have permissions to view.
6. Enter the **Request Title**. **Optional**: Select a proposed future effective date using the **Proposed Effective Date** field. If a date selection is made, the date the request is approved is the effective date.
7. To continue processing the request, select the line item within the new **Work Queue** tab. Selecting the line item will open the **Edit/Detail** panel on the right side. Make the necessary edits prior to marking the item for deactivation.
8. Right-click and select **Mark Item for Deactivation**. Comments or attachments can be added to the request.
9. On the **Request** panel, click **Action** and click **Submit Request**.

Request Tab

The **Request** tab is where you can view and access requests to perform workflow steps. This tab includes a **Request Search** panel on the left, a **Request** panel in the center, and an **Edit** panel to the right.

The **Request Search** panel is where you can define search criteria and view the results in the request table.

1. Select **Products** > **VitalCDM**.
2. Click the **Requests** tab to open the **Request table**.

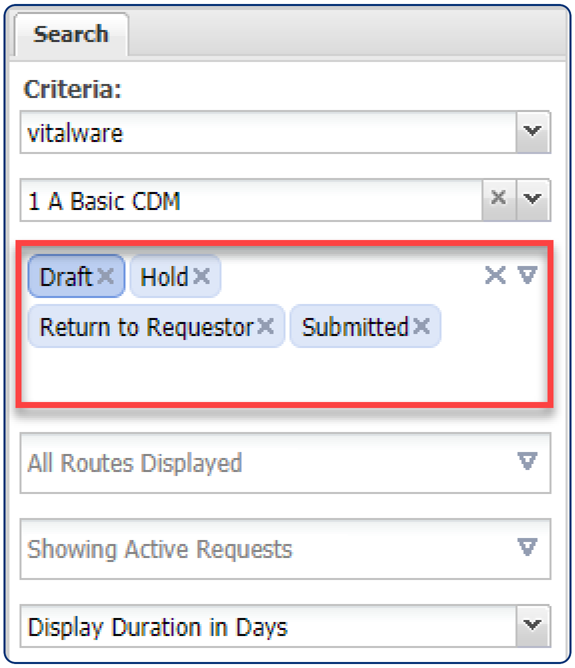


Search Panel

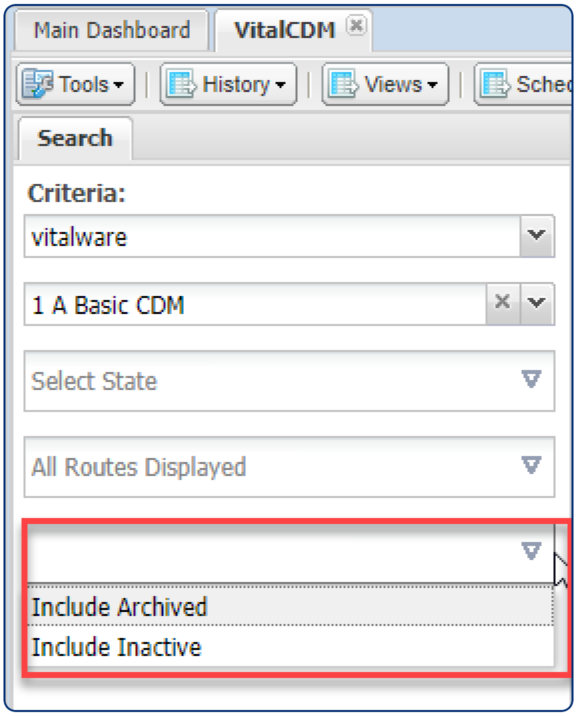
The **Search** panel opens on the left and lists the following three filters:

Criteria

1. Select an **Entity**.
2. Select a **Group** if applicable. If you have multiple CDM files grouped together, you can use this to view requests for all grouped files at once. If grouped view is selected, you will see an option to view all CDM files in the group or you can restrict the CDMs in the group to show only those you want to view.
3. Select the **CDM**. This option is not visible if **Group** is selected.
4. By default, requests in Draft, Hold, Return to Requestor, and Submitted states are displayed. Click the **X** next to a state in the search box to remove it. To add additional states, select the drop down menu in the field and select additional states. Additional selections will be visible in the search field.



5. Select a **Route** if you want to limit search results to specific routes. If the route is left blank, all routes assigned to you will be the default output.
6. By default, active requests are displayed. You can also view archived or inactive requests.



7. The display duration default is **Display Duration in Days**. This default can be modified. Select the drop down arrow to select **days**, **hours**, or **minutes**.

Date Search

To search by date, click the drop-down arrow on the **Created** field and select **Created**, **Approved**, **Denied**, **Effective Date**, or **Finalized (Approved & Denied)**.

To activate this filter, select the **From** and **To** dates using the calendar widget, or you can manually enter the date using the following format: **MM/DD/YYYY**.

Search Text

The **Search Text** feature is how you search requests using either Basic or Advanced filters.

Basic Filters

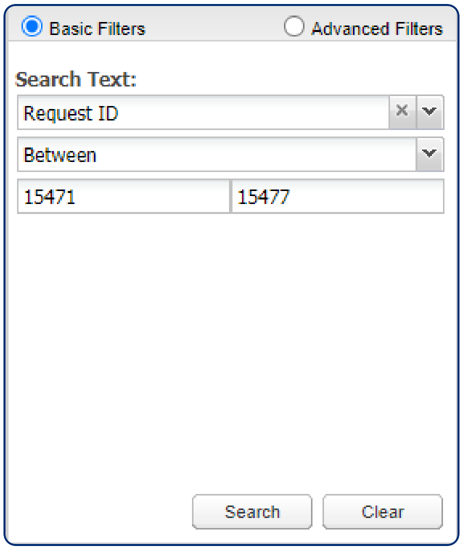
Enables search using any of the Request Manager fields.

1. **Select a Field to Search**: Click the drop-down arrow and select a field filter results.

   Options include:

   - Draft Duration
   - Finalized By
   - Hold Duration
   - Request ID
   - Request Name
   - Requestor
   - Step Duration
   - Total Duration
   - Work Queue

2. **Select Operator**: After you select a field to search, click the drop down arrow within the field and you can select the applicable operators.
3. **Enter Search Criteria**: Enter your search criteria. Once filters are set, click **Search** to populate the results in the Request table.

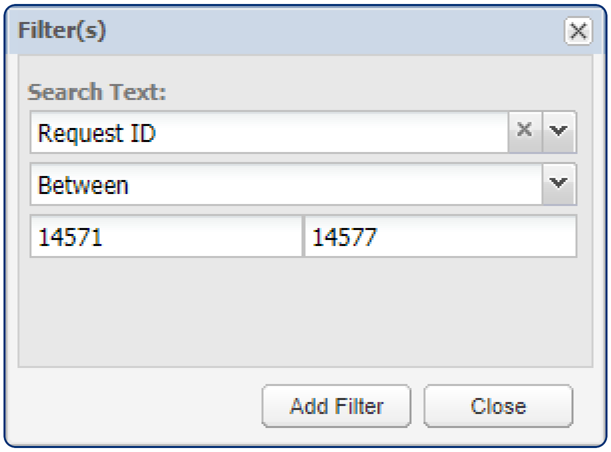


Advanced Filters

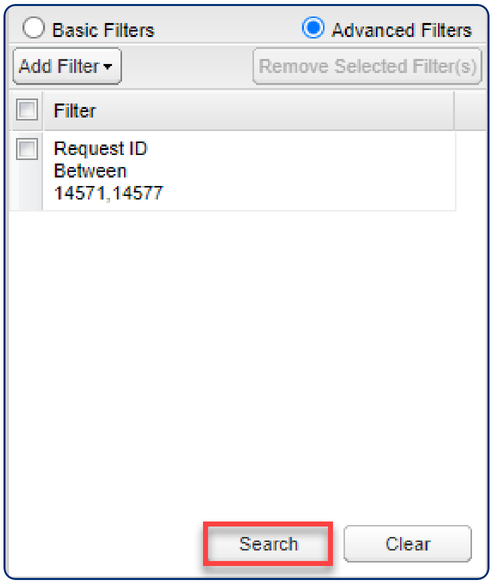
Enables you to apply multiple filters to search in both the **Request**

Manager Fields and **CDM Fields** specific to the request route.

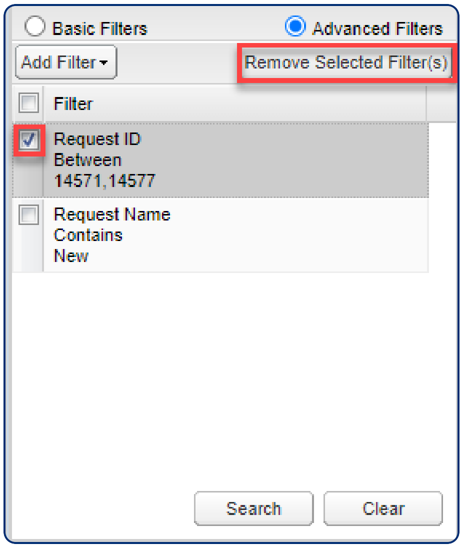
1. Click **Add Filter** and select either **Request Manager Fields** or **CDM Fields** from the menu.
2. Select a **Field** to search from the Filters dialog.
3. Select an **Operator**.
4. Enter your **Search Criteria**.
5. Enter your search criteria and click **Add Filter**.



6. The search criteria results can be viewed in the left panel. Continue to select **Add Filter** and input fields until all criteria are added.
7. Once you have added your criteria, click **Search** at the bottom of the left panel.



You can remove filter criteria by selecting the specific criteria you want to remove, and then clicking **Remove Selected Filter(s)**. Click **Search** again and the results will be updated in the table.



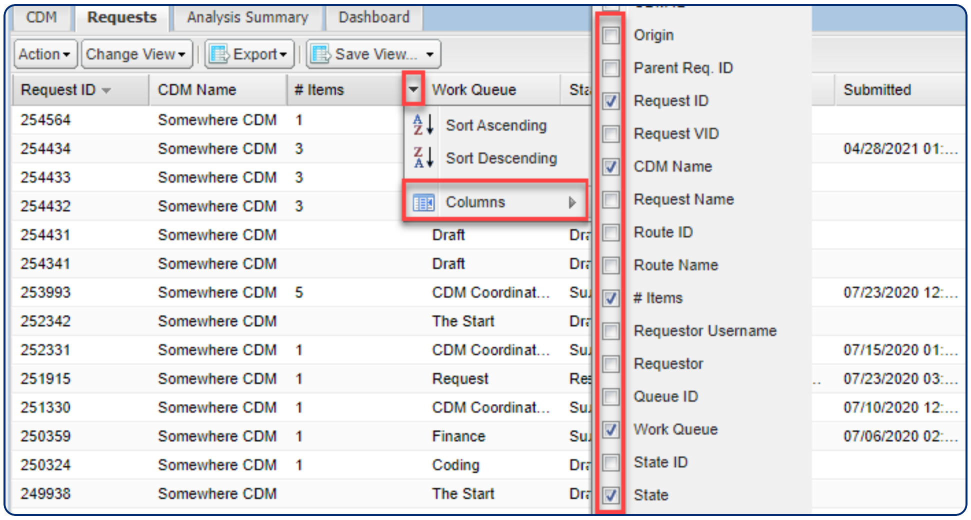
Customizing the Request Table

Sorting Columns in Ascending or Descending Order

- To sort a column in **ascending** order, click the column header **once**.
- To sort a column in **descending** order, click the column a **second time**.

Adding Columns

Hover over a column header arrow and click **Column**, then select the columns you want to add to the view.

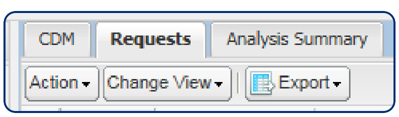


Reordering Columns

You can reposition a column by dragging it to the new location. Arrows between columns indicate where you can drop a column.

Request Table Options

Additional options in the Request interface are located in the upper left corner above the results.



Action

Action options vary and are based on the current state of the request and your specific user settings and permissions. Action options include the following:

- **Submit**: This option will initiate the request and move it to the stage within the work queue.

- **Move to 'X'**: This option is for requests in a submitted state and will move the request forward to the next work queue. If you are a member of the CDM Adminrole, you can move requests to future work queues.
- **Approve Request**: Approve Request is how you approve request updates to be made to the CDM file listed in the request. If any fields are missing, you will be alerted with an error message indicating missing key fields are required. Email notification will be sent to the requestor notifying them the request has been approved.
- **Deny Request**: Selecting this option will end the process for the selected request and the items within it. Requested edits will not be made to the CDM. Email notification is sent to the requestor to notify them the request has been denied.
- **Return to Requestor**: Selecting this option will move the request back to the original requestor. The requestor can then continue to provide edit requests or add comments/attachments and submit the request again.
- **Put Request on Hold**: Selecting this option will remove the request from the active Submitted state to a Hold state. All request history is retained and the request can be resumed at a later time.
- **Resume Request Processing**: Selecting this option will move a request from a Hold state to a Submitted state and will allow for the request to continue through the work queue process.
- **New Request**: Intiates a request to add a new item to the CDM file.

Change View

You can toggle between a **Simple** or **Detailed** view depending on the level of detail needed. **Simple View** is the default.

- **Simple View**: Each request is visible in one row and allows you to view general details about the request, including **request title**, **requestor**, **current work queue and state**, and **duration information**.

- **Detailed View**: This view is essentially the simple view plus details for each line item included within the request.

  The **Total Duration** column displays a running total of the time the request has been in all queues.

Work Queue	State	Returned	Submitted	Total Dur.	Hold Dur.	Queue Dur.	Finalized Date
Draft	Draft		01/24/2020 02:...	0.20	0.00	0.20	01/28/2020 09:...
Facility CFO	Submitted		01/24/2020 02:...	66.47	0.00	66.27	01/28/2020 09:...
SME Approver	Submitted		01/24/2020 02:...	67.92	0.00	1.45	01/28/2020 09:...
CDM Approver	Submitted		01/24/2020 02:...	103.85	0.00	35.93	01/28/2020 09:...
CDM Approver	Approved		01/24/2020 02:...	103.85	0.00	35.93	01/28/2020 09:...
				103.85 hour	0.00 hour		

  The **Queue Duration** column displays how long the request spent in each individual queue. In the example below, the request was in the **Draft** queue for 0.20 days, the **Facility CFO** queue for 66.27 days, the **SME Approver** queue for 1.45 days, and the **CDM Approver** queue for 35.93 days.

Work Queue	State	Returned	Submitted	Total Dur.	Hold Dur.	Queue Dur.	Finalized Date
Draft	Draft		01/24/2020 02:...	0.20	0.00	0.20	01/28/2020 09:...
Facility CFO	Submitted		01/24/2020 02:...	66.47	0.00	66.27	01/28/2020 09:...
SME Approver	Submitted		01/24/2020 02:...	67.92	0.00	1.45	01/28/2020 09:...
CDM Approver	Submitted		01/24/2020 02:...	103.85	0.00	35.93	01/28/2020 09:...
CDM Approver	Approved		01/24/2020 02:...	103.85	0.00	35.93	01/28/2020 09:...
				103.85 hour	0.00 hour		

- In the upper right corner of the request table you can choose to **Expand All** or **Collapse All**.

Export

Export is where you can export request table results.

1. Click **Export**.
2. Choose the file format type you want to export to. ***.csv** (common separated value) is the default file format type. To select a different file format, click the space to the left of the format type.
3. Select **Click to Export** to export. You will receive an email with a link to the exported file shortly after you export. When you receive a request

notification email, you will see the following line just under the request title:

Generate Export: Generate this Email with Request Export Attached

When you click this link, you will receive a second email with the request export attached as an Excel file. This means that if you have added a non-Vitalware user's email address as a notification recipient, that user will be able to access the Excel file as well. Alternatively, you can forward the email with the Excel file to any non-Vitalware user who may need it.

Note: Due to Microsoft Excel limitations, exports with more than one million line items will be truncated. You will receive a warning if your export will exceed this limit, so that you can use filters to reduce the size of your export.

Right-Click Request Options

Right-click on an item to select additional request options. Available options vary, depending on the current state of the selected request and your user account permissions.

- **Submit and Move ...**: Right-clicking on a request currently in the Draft state enables you to submit a request and move it to another queue. If you do not have permission to skip queues, the next queue will be selected automatically. Once selected, a verification pop up window will prompt you to add additional email addresses to send notifications that are sent when the request is submitted. Email notifications are sent to the person(s) assigned to the next work queue.
- **Delete Request**: Available only for a request currently in the Draft state. When you select **Delete Request**: a pop-up window will prompt you to confirm the deletion.

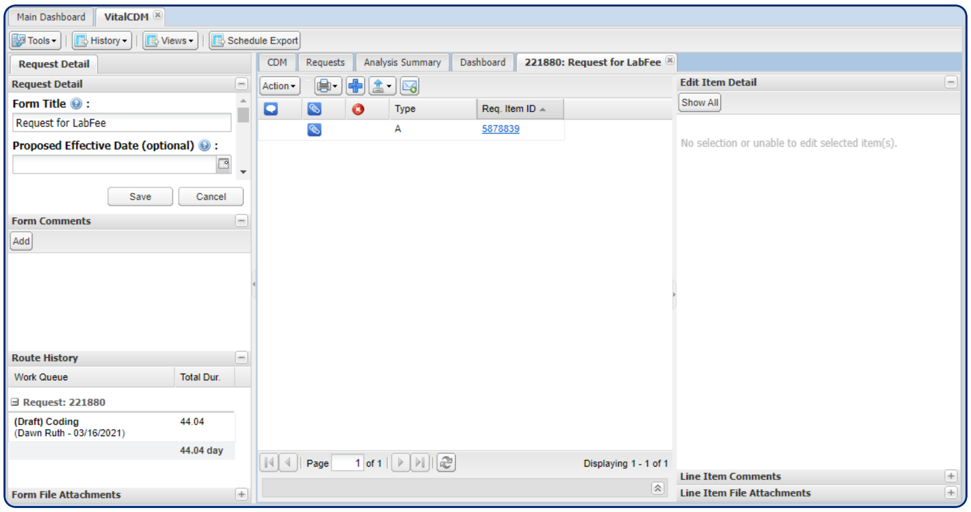
- **Move to ...**: By right-clicking on a request currently in the Submitted stage, you can move the request forward to the next work queue. An email notification will be sent to the people assigned to that work queue.
- **Return To ...**: If the request is beyond the first work queue in the route, you can return the request to any of the previous stages. Hovering over **Return To** will open the available work queues for the request to return to.
- **Return to Requestor**: If the selected request is in a Submitted state, you can return the request to the original requestor and an email notification will be sent.
- **Approve Request:** Selecting **Approve Request** will enable updates to a CDM file as listed in the selected request. If any required key fields are missing, you will get an alert with an error message indicating the missing key fields. An email notification will be sent to the original requestor when this action is completed.
- **Deny Request**: Selecting this option will end the request process for the selected request and items contained within it. Requested edits will not be made to the chargemaster. An email notification will be sent to the original requestor when this action has finished.
- **Put Request on Hold**: Selecting this option will remove the request from the active Submitted state to a Hold state. All request history is saved and the request can be resumed at a later time. An email notification will be sent to the original requestor when this action has finished.
- **Archive Request**: Requests that have been approved or denied can be archived. Use of the Archive state will prevent searching for and discovering the request that has Approved or Denied filter options set within the search panel.
- **Resume Request Processing**: Requests that have been placed on hold must resume request processing before the request can be moved or finalized.

- **Print Request PDF**: Enables you to view, save or print a request in Adobe Acrobat PDF file format. Exported information includes **Request Details**, **Route and change history**.
- **Export Request**: Opens the export request in Excel and includes the **request detail**, **change history** and **field information**.

> **Note**: When you double-click an item, the specified request will open and show the request form.

Request Forms

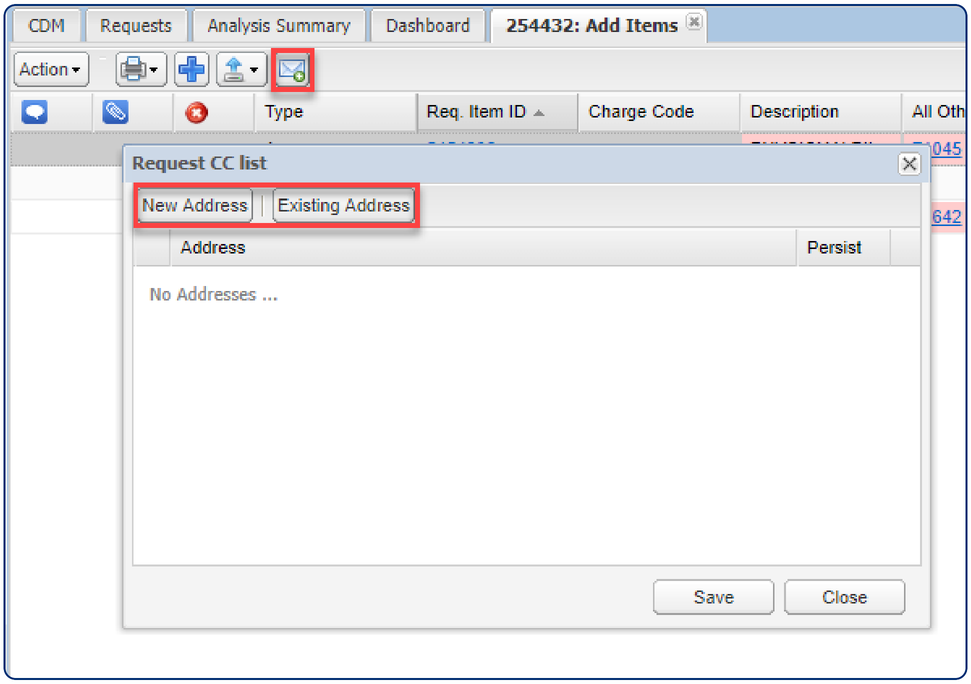
In the request table, double-click a request to open the request form.



Notify Others Option

You can use the **Notify Others** button to select people to receive notifications of an action.

You can either manually enter the email addresses or select the email addresses from a list of existing email addresses. Select the **Persist** option to ensure notifications will be sent to these addresses for all future changes.



Change History

To activate the change history option, you must select an item within the request form. Click **Change History** and a new tab will be visible that highlights the changes and includes the date of change and the user who made the change.

Import Options

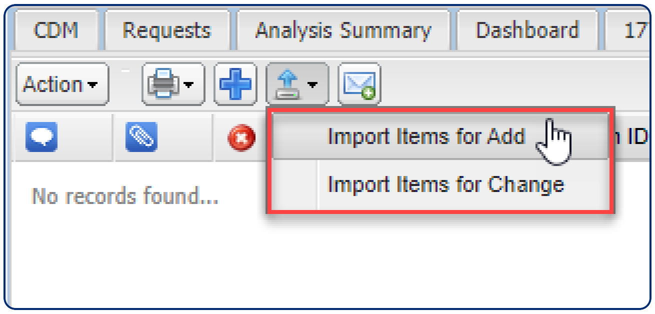
The import options allow you to import additions or changes using a template .csv (comma separated value) file.

- **Adds** are verified to determine if the items do not already exist to prevent duplicates.
- **Changes** on existing items are located and updated.

Note: A maximum of 30,000 items can be imported.

Below are the steps to import adds or changes:

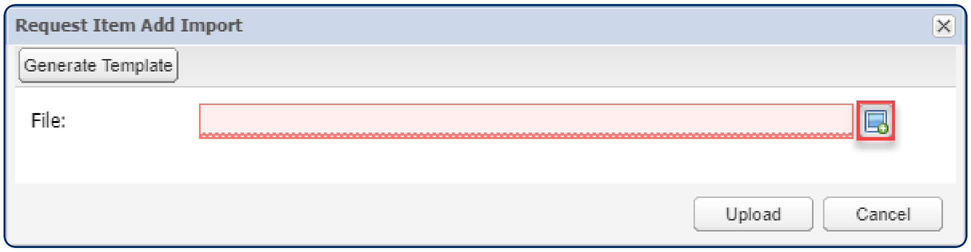
1. Open a new request by selecting the **Requests** tab and selecting **Action > New Request**.
2. Select the option to **Import for Add** or **Import for Change**.



3. On the **Request Item Add/Change Import** dialog, click **Generate Template**. The template .csv file will be downloaded.
4. Click **OK** on the message stating that you must not change or remove the columns in the first row.
5. Enter your information in the downloaded .csv file and save it.

> **Note**: If you need to change a field to be blank, enter **(BLANK)** (with parentheses) for that field on the import file.

6. Click the **Browse** button and select your file.



7. A message will inform you the import process started. You will be notified by email after the process has completed.

Plus Icon

This option is where you can manually add new line items to a request.

- After you make a selection, a pop up window, **New Request Line Item(s)** appears and is where you enter the information.
- You can add up to 50 new items to a request form. If more than 50 additions, an error message will notify you that only 50 items are allowed.
- If any of required fields are empty, when you click **Save** you will see a pop up message indicating you have **Errors/Warnings**. All errors must be resolved before you can save the additional line item.

Printer Icon

Print Request PDF: Allows you to view, save or print the selected request in Adobe Acrobat PDF file format. The information will include request details and route and change history.

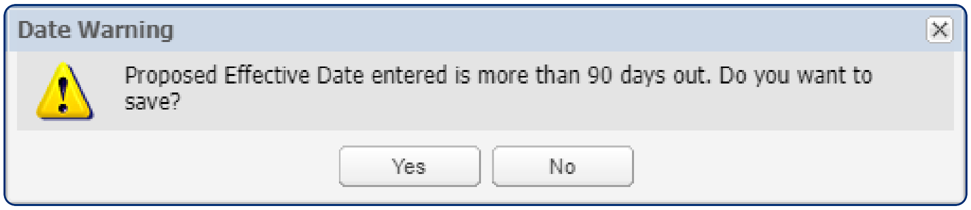
Export Request: Opens the request in the export file format and shows request details, change history, line item comments and request field information.

View Cart

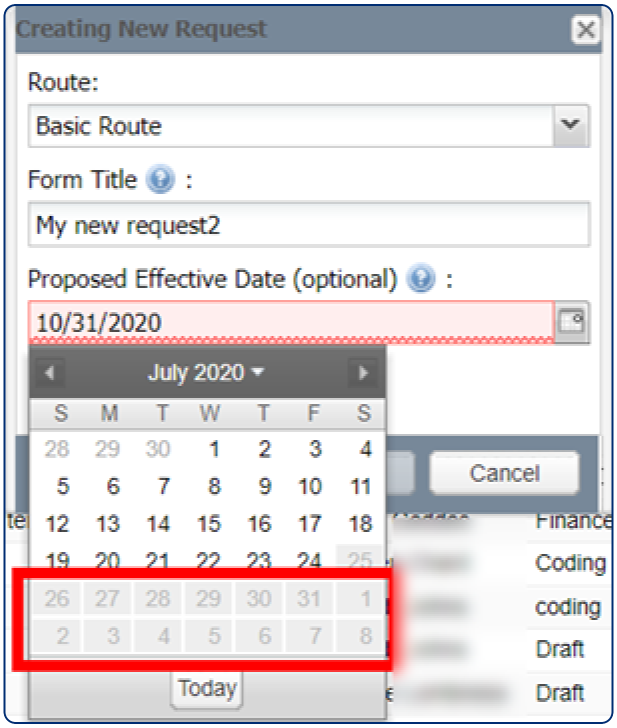
View cart is where you can view items that have been previously added to your cart from Reports.

Proposed Effective Date Greater than One Year

- You will get a warning message if the proposed effective date on a new request is **greater than 90 days** from the current day.



- You cannot select a date greater than a year from the date picker:

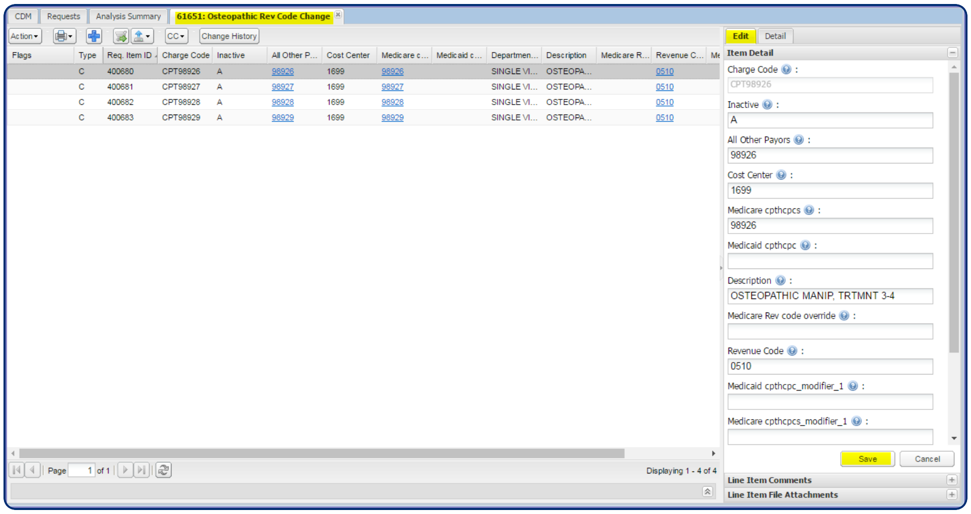


Suggest Edits within Request Form

Suggest Edits are made in the request form for specific fields in the setup process.

1. From the **Request panel**, double-click the **request to be edited**. You can also access a request in **Reports** when adding or creating a request.
2. Select the line item you want to edit by clicking anywhere within the item row.
3. You can update any field open for editing via the right panel of the form within the **Edit** tab.
4. Click **Save** after all line item edits are made. Updated items are visible and highlighted in pink in the modified cell(s).
5. To view the original values, you can add a column to the request form by selecting the down arrow on any column header and selecting the field with **(orig)** next to it.

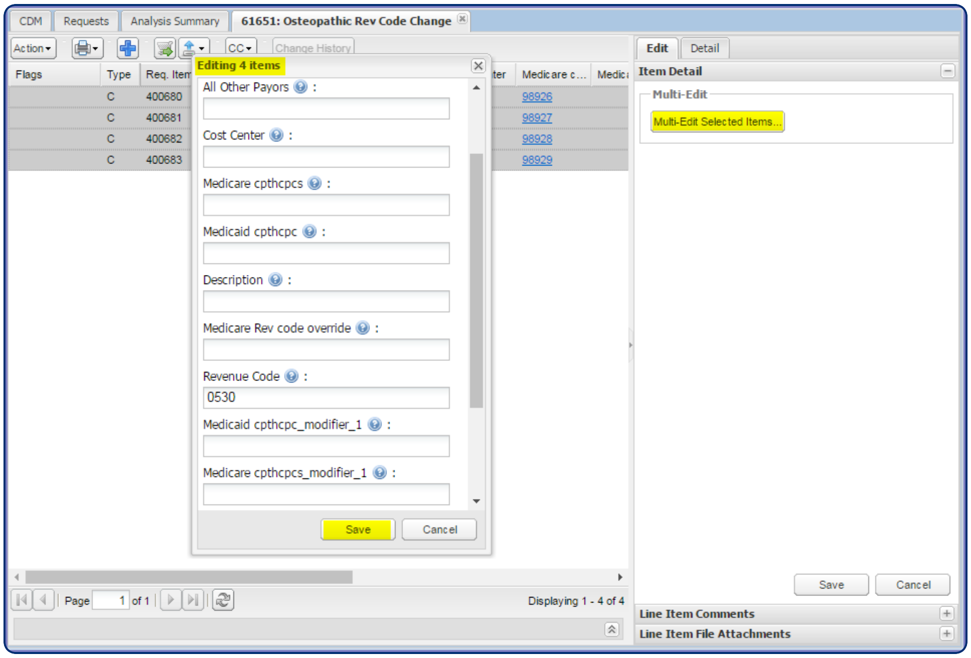
6. Select and edit line items as needed.



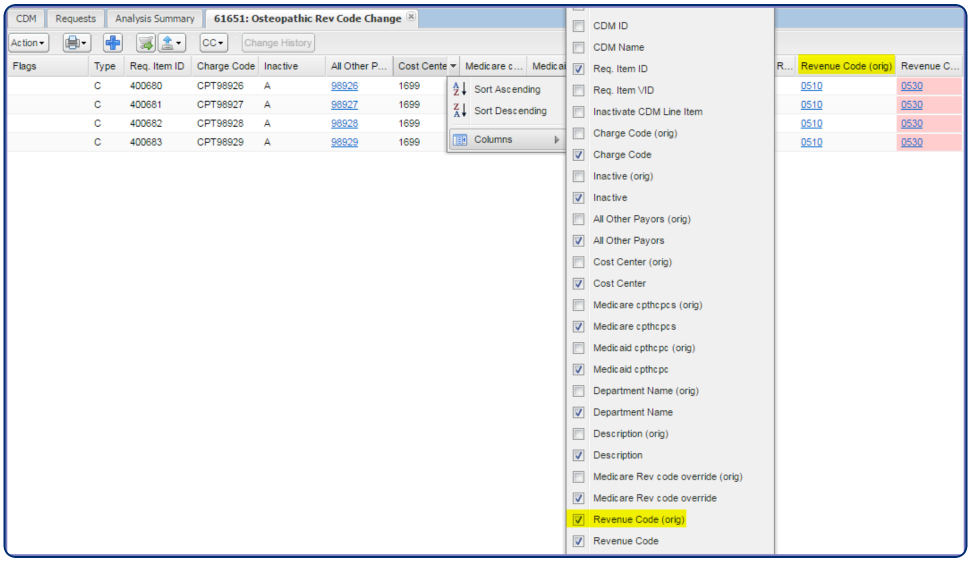
Multi-Edit

Multi-edit enables you to apply the same edits across multiple line items.

1. Select all the line items you want to edit.
2. In the **Edit** tab, select **Multi-Edit Selected Items** and a form appears in the center of the screen.
3. Edit the line items you want to apply to all of the selected line items.
4. Click **Save.**



- Updated items are highlighted in pink within the modified cell(s).
- To view the item's original value, you can add a column to the request form by clicking the down arrow on any column header and select the field with an **(orig)** next to it.



Cost Center Assignment

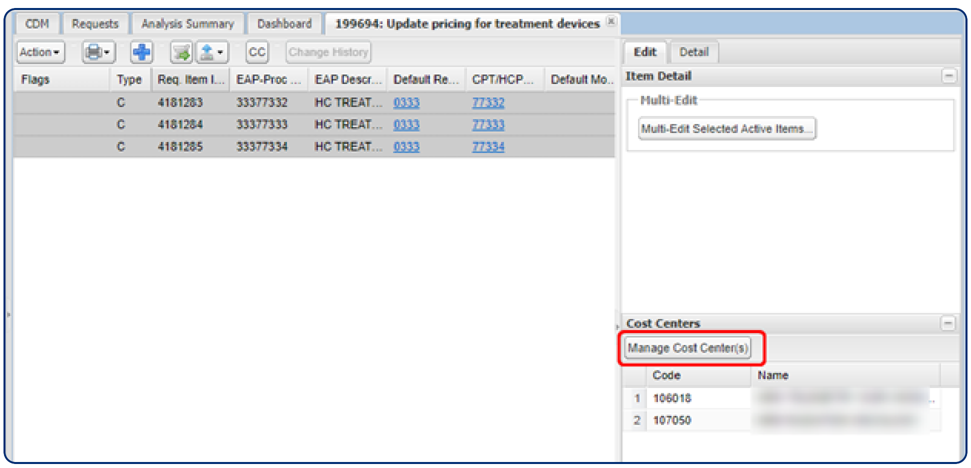
For cost center based files, you can request items are added to additional cost centers.

1. Select the item or items you want to edit.
2. In the **Edit** panel, click **Cost Centers** to open the pane.
3. Click **Manage Cost Center(s)**. You can either double click the cost centers which the item should be assigned to, or right-click to select multiple cost centers and click **Add (#) cost centers to the selected CDM line**.
4. Click **Save** to return to the request form. Items will be available for use in the cost centers once the request has been approved.

Assigning a Cost Center to Multiple Items in a Request

Multiple line items can be selected for cost center assignment additions at once.

1. Click the **Manage Cost Center(s)** button to open a list of available cost centers.
2. Selecting to add a cost center will add it to any of the selected lines where that particular cost center was not previously applied.



Request Form Line Item Options

If you right-click any of the line items you can view additional options for managing requests.

- **Copy item**: Make copies of the line item in a request.
- **Mark Item(s) for Deactivation**: Selecting this option will mark the item in the **Request** form to be deactivated. Upon request approval, the item is

switched from an active line item to an inactive line item within the CDM file.

- **Reactivate item(s)**: Reactivates items that are marked for deactivation or are deactivated. Once the request is approved, the item is set as an active line item in the CDM file.
- **Remove item(s)**: Removes line items in a request with multiple line items. Remaining items will be processed via the work queue.
- **Split item(s) into New Request**: Splitting items into a new request will move the selected items from the current request form to a separate request form submitted via any route you have access to. Requests can be split multiple times.
  - A new request will open a new tab with full functionality to return to a previous queue or move forward in the queue.
  - Items can be approved or denied in a new request.
- **View Change History**: When you click **Change History**, a new tab opens highlighting changes, including the date stamp and the user who made the change.

Request Notes

Request notes can be added to request forms and specific request items.

Double click the item and the **Edit** tab opens so you can add notes to a specific line item.

There are two possible locations to enter a note for a line item:

1. In the **Item Detail** section, scroll to the bottom to view the **note box**. You can enter notes here, and the notes will be added to the line item after you click **Save**.

2. In the **Line Item Notes** section, click the **+** icon. Clicking **Add** opens a note. You can enter notes within this box, and they will be added to the line item when you click **Save** in this section.
    - All saved notes are visible in the Line item Notes section of the Edit tab, and are saved with the date, time and user name.
    - You can edit or delete notes you created; however, you cannot edit notes saved by other users.
    - A note icon is added to the flag column for any line items that have Line Item Notes.
    - When entering notes, you will see a check box next to **Attach Note on Approve**. Selecting this option will attach the note to the line item when the request has been approved and is added or updated in the CDM file.

Adding Notes to the Request Form

1. Click on the **Detail** tab.
2. Click on the **+** icon to expand the **Line Item Notes** section of the panel.
3. Click **Add** and enter a note using the text field. Click **Save** when finished.
4. New notes appear in the **Line Item Notes** section of the **Detail** panel and are saved with the date, time and user name. You can edit or delete any notes that you have created. Changes cannot be made for notes saved by other users.

Note: Form notes cannot be added to requests in a hold, archived, approved, or denied state.

Request Attachments

Upon selecting line items in a request form, the **Edit and Detail** panel is visible on the right side of the screen.

1. To add file attachments to a specific line item, click the **Edit** tab.
2. Click the **+** icon to expand the **Line Item File Attachments** section of the panel.
3. Click the upload icon. Required fields are **Name** and **File** and are in red.
4. You can select an existing file by clicking **Choose Existing File** in the upper left corner of the **Upload** window.
5. Enter the name and description for the attachment.
6. Browse for your file by clicking on the icon to the right of the **File** field.
7. Once the file has been located, click **Upload**. The new comment is visible in the **Line Item File Attachments** section of the **Edit** panel.
8. Right-click the **file attachment** to download, detach or attach the file to the line item upon item request approval. These actions can be completed by any user.

Adding File Attachments to a Request Form

1. Click on the **Detail** tab.
2. Click on the **+** icon to expand the **Line Item File Attachments** section of the panel.
3. Click the **Upload** icon. The upload window will show the required fields, **Name** and **File**, which are in red.
4. You can select an existing file by clicking **Choose Existing File** in the upper left corner of the **Upload** window.
5. Enter the name and description for the attachment.
6. Browse for the file you saved by clicking the screen icon to the right of the

File field.

7. Locate your file, and then click **Upload**.

Note: Form comments cannot be added to requests on hold, archived, approved, or denied state.

Chapter 11: Understanding Additional CDM

Additional file options are available to help assist in setting up your CDM files. Additional file options are not available to all CDM customers. Contact your Vitalware account manager to determine if the additional file options could be of benefit to your organization.

User Restriction by CDM File

Entities with multiple CDM files can limit users to view only specified CDM files. By default, CDM users will have access to view all CDM files at an entity. If you need to restrict user views, please contact your Vitalware account manager to apply the restrictions.

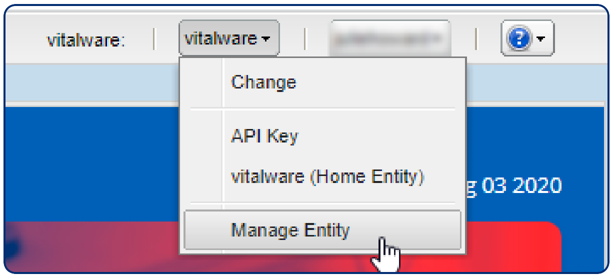
CDM Access

> **Note**: Only Administrator users are able to change a user's access level.

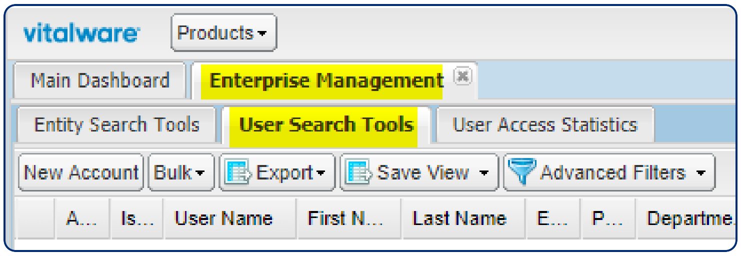
VitalCDM has a role-based functionality that allows you to manage individual users' access within the product.

To change a user's access, do the following:

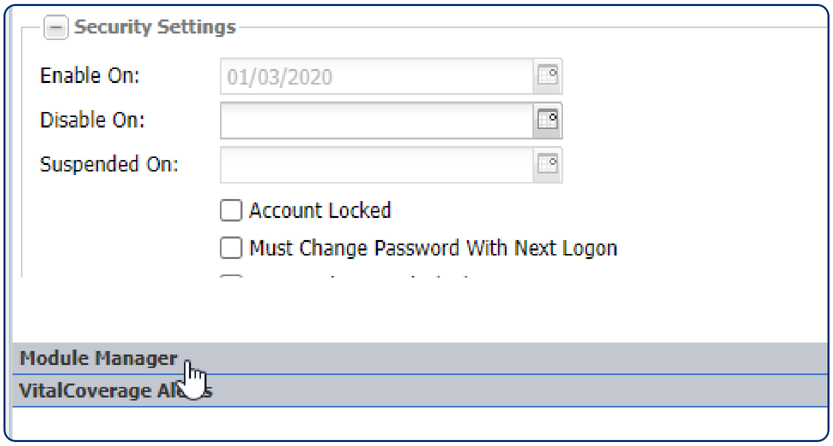
1. Select the drop-down list beside your user name, and then select **Manage Entity**.



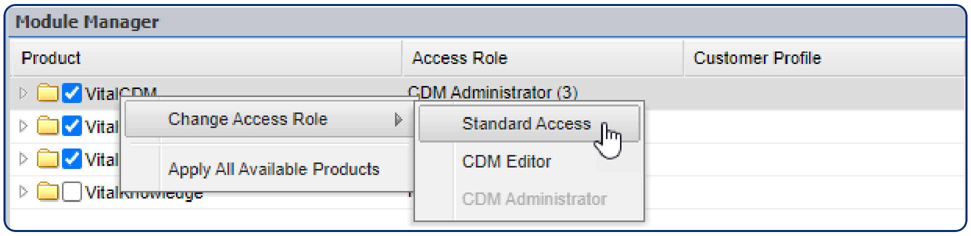
2. Select the **User Search Tools** tab and find the user you want to manage.



3. Click the **Module Manager** option at the bottom of the screen.



4. Right-click **VitalCDM** and hover over **Change Access Role** to select from the available options.

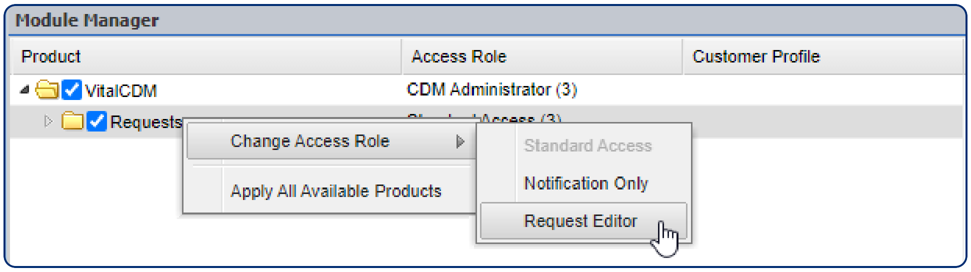


The following access levels are available:

- **Standard Access**. Will be assigned by default when giving the user access to this product. This allows a user to access the VitalCDM tool and to search, run reports, and export from the system, but cannot make any edits. This role, in combination with the request standard access role, can create requests as well.
- **CDM Editor**. Gives the user edit capability to make manual changes directly to the CDM grid via the right panel. An edit icon displays in the upper right corner of the grid to open the edit tab in the right panel. This user can also approve and deny requests at any queue, and view hidden form fields by clicking **Show All**.
- **CDM Administrator**. Allows the user the same permissions as the CDM Editor, and also allows access to the **Tools** menu and any features housed in the Tools menu (Workflow Settings, Analysis Details, Manage Departments, Manage Deletion Queue, Import Log and Exclusion Rules). Also allows the user to edit Read Only fields and save an item without populating a required field (unless the field is part of the record identifier).

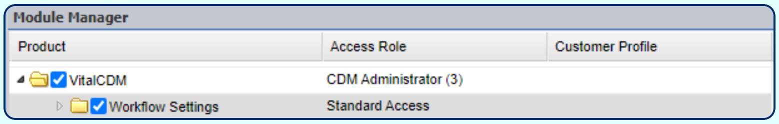
Request Access

Housed under the VitalCDM product is another role-based function labeled **Requests**. The different roles will define how you are able to view and manage requests within the CDM product.



- **Standard Access**. This access role allows the user to create requests in VitalCDM Workflow based on existing items or to start brand new item requests. They only see their own requests in the Requests tab by default.
- **Notification Only**. Can be assigned for a user within the facility that may need to be notified of requests being submitted to their assigned queues; however, they will not be able to participate in the request itself in VitalCDM. This user will be notified via email any time a request is sent to their queue.
- **Request Editor**. A Request Editor can create, approve, or deny requests at any queue, and edit a Read Only field in a request form.

Note: Enabling the **Workflow Settings** module allows the user to modify Workflow routes and assign users to Workflow queues.



Grouped CDM Files

CDM files can be grouped together so that you can view multiple CDM files in one screen. This is helpful for health systems who want to view CDM files from multiple entities in a single view. Grouping requires the identification and mapping of like fields. If you are interested in this feature please contact your Vitalware account manager for assistance.

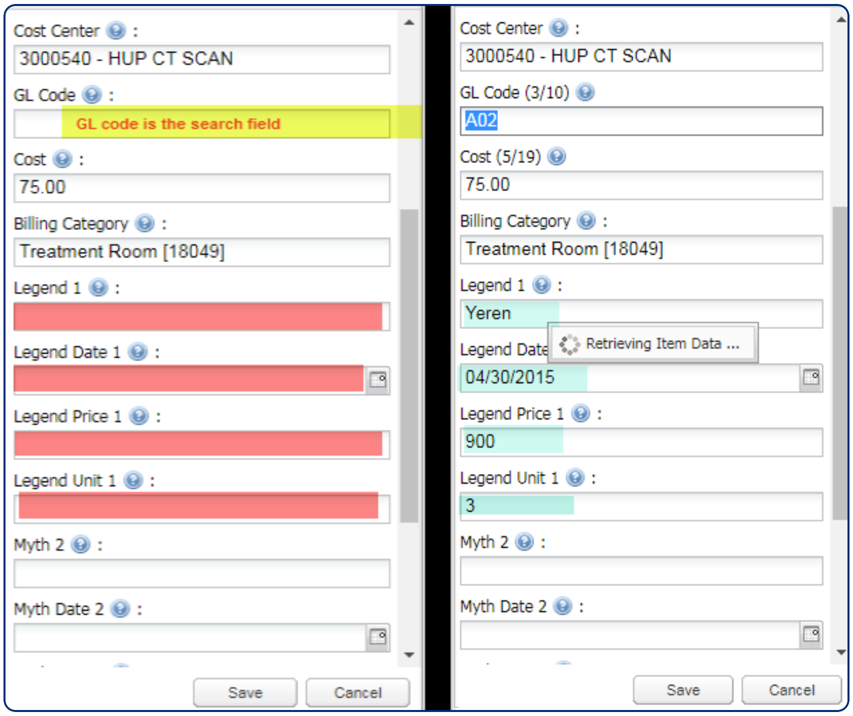
Parse Link Fields

Some CDM files have fields that are used to list related CDM line items. As an example, some CDM files include a column listing all related "explosion" codes that are related to the CDM item. These fields can be identified as a Parse Link field and will allow you to view the "explosion" CDM items in the lower panel when you click the related item. This view allows for simplified identification of linked/related CDM items. If you are interested in this feature please contact your Vitalware account manager.

Crosswalks

Crosswalk functionality allows you to designate a source file to pull data from and merge specific data into CDM line items. This enables adding data from disparate systems that were normally inaccessible.

In the example below, entering the GL Code automatically populates the legend data from the crosswalk.


Cost Center :
3000540 - HUP CT SCAN
GL Code :
GL code is the search field
Cost :
75.00
Billing Category :
Treatment Room [18049]
Legend 1 :
Legend Date 1 :
Legend Price 1 :
Legend Unit 1 :
Myth 2 :
Myth Date 2 :
Save
Cancel
Cost Center :
3000540 - HUP CT SCAN
GL Code (3/10)
A02
Cost (5/19)
75.00
Billing Category :
Treatment Room [18049]
Legend 1 :
Yeren
Legend Date
Retrieving Item Data ...
04/30/2015
Legend Price 1 :
900
Legend Unit 1 :
3
Myth 2 :
Myth Date 2 :
Save
Cancel

Appendix A: Data Set Explanation

Name	Setting	Content Detail	Availability
MedPAR Used to set DRG grouping and pricing	-Rate Setting -Medicare Inpatient	**Contains :** • ICD-9 Diagnosis codes • ICD-9 Procedure codes • DRG codes • Hospital MPN **Does not have:** • Revenue Code Line Item Detail • Physician Detail • Hospital NPI	**Based on fiscal year** October -September **Published each August for previous fiscal year**
Outpatient Prospective Payment System (OPPS) Used to set APC pricing	-Rate Setting Medicare Outpatient	**Contains :** • Select Hospital Data • Diagnosis codes • Revenue code line item detail • Line item cost data • APC codes and Payment Info • Hospital MPN **Does not have:** • Physician Detail • Hospital NPI	**Based on calendar year** **Published twice a year**: February and August

Inpatient Standard Analytical File (SAF)	100% of Medicare inpatient claims Research	• Diagnosis (ICD-9 Diagnosis) • ICD-9 Procedure Code • MS-DRG • Dates of Service • Reimbursement Amount • Hospital Provider Number • Beneficiary Demographic Information • Revenue Center Line Item Detail • Condition Codes • Occurrence Codes • Value Codes • Hospital MPN • Hospital NPI • Some Physician Data	**Published each November for previous fiscal year**

Outpatient Standard Analytical File (SAF)	Research 100% of Medicare outpatient claims	• Diagnosis (ICD-9 Diagnosis) • CPT/HCPCS Codes • Dates of Service • Reimbursement Amount • Outpatient Provider Number, • Revenue center Line Item Detail • Beneficiary Demographic Information • Condition Codes • Occurrence Codes • Value Codes • Hospital MPN • Hospital NPI • Some Physician Data	**Published each November for previous calendar year** (e.g. November 2013 data set to include January 2012 - December 2012)
Physician/Supplier Part B Standard Analytical File (also called **Carrier Standard Analytical File**)	Research 5% of Medicare Professional claims	• Diagnosis and Procedure • ICD-9 Diagnosis, CPT/HCPCS Codes • Dates of Service • Reimbursement Amounts • Beneficiary Demographic Information • Service Level Detail • Some Physician Data • State • Does not have Clinic Info	**Published each November for previous calendar year** e.g. November 2013 data set to include January 2012 - December 2012

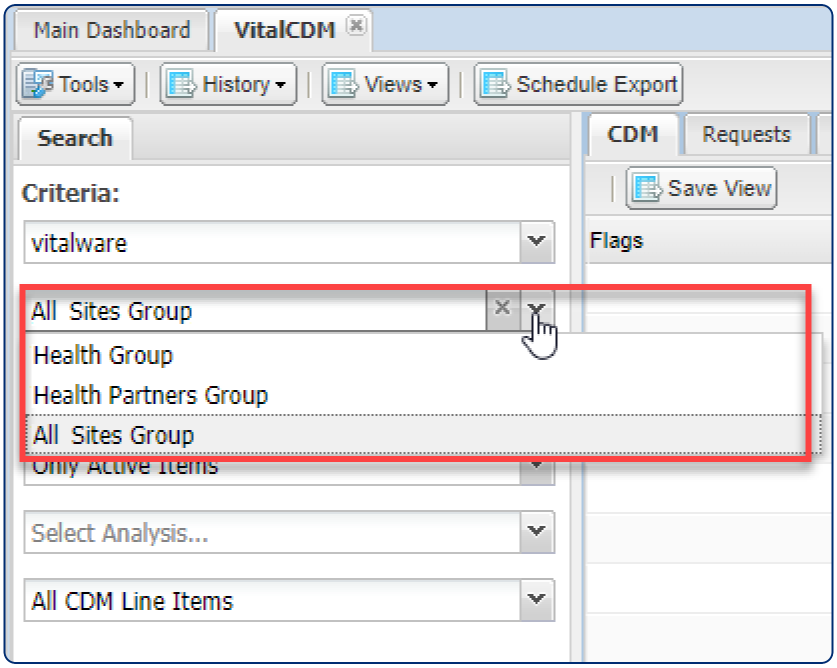
Appendix B: Corporate Standard Auto Push

If your organization uses the Corporate Standard Auto Push function, changes made to items in the corporate standard file can be pushed to all other CDM files in the organization.

Corporate Standard Reports

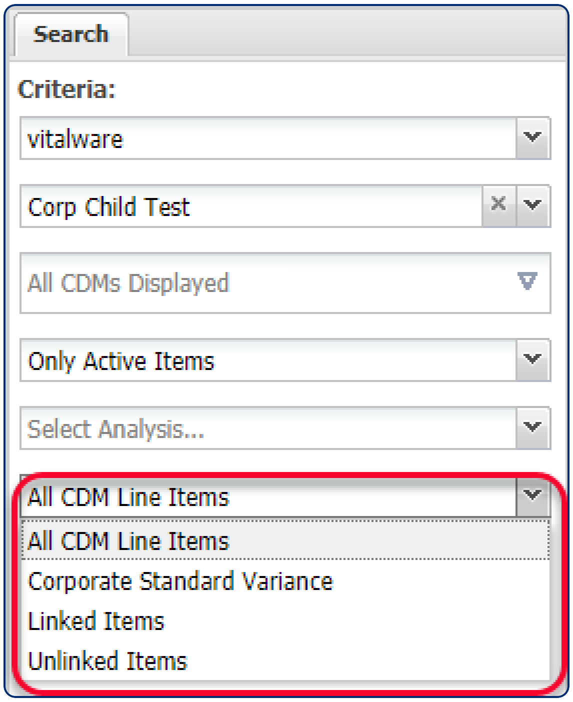
To access reports regarding corporate standard items, do the following:

1. Select the group that includes the Corporate Standard file and the hospitals associated with it.



2. Leave the default selection of **All CDMs Displayed** if the entire group is to be included in the report. Select specific CDM files to display a subset of the group.

3. Select the report you want to view:



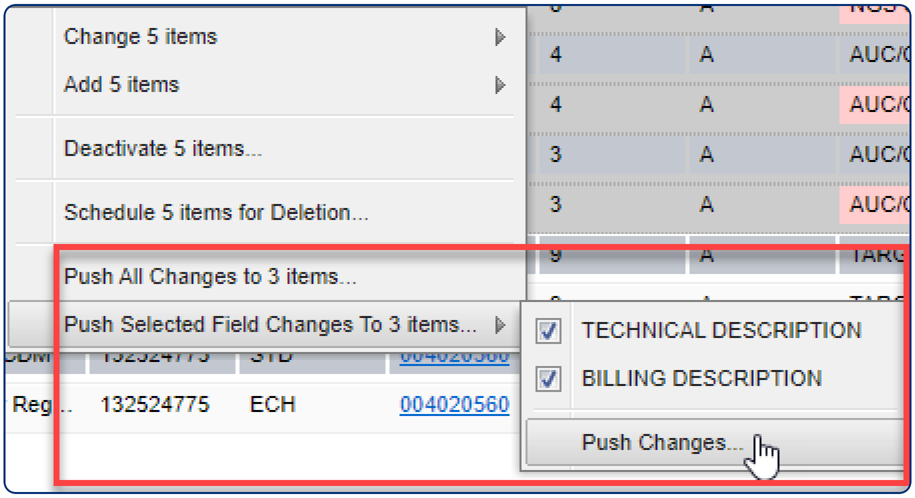
- **All CDM Line Items**: This report will display all CDM items for all facilities included in the group. A value in the **Parent Link ID** column will signify the line item is linked to another file. This column can be sorted to put all linked items at top by clicking on the column header. To access the linked items, click on the link included in the Charge Code field (it will be blue with an underline).
- **Corporate Standard Variance Report**: This report will display any line item in a child file that has a managed field when that field does not match the Corporate Standard information.
- **Linked Items Report**: This report will display any line item that has been linked to at least one other line item within the group. To access the linked items, click on the link included in the Charge Code field (it will be blue with an underline).
- **Unlinked Items Report**: This report will display any line item for the files included in the group that have NOT been linked to at least one

line item in another file. Once a link has been created using the designated field, the line item will be removed from this report and move onto the **Linked Items** report.

Pushing Changes From the Corporate Standard Variance Report

You can use the Corporate Standard Variance report to push changes to items that do not match the Corporate Standard file.

1. From the Corporate Standard Variance report, select the items you want to push changes to.
2. Right-click and do one of the following:
   a. Click **Push All Changes to (x) items**.
   b. Select **Push Selected Field Changes to (x) items**, select the changes you want to push, and click **Push Changes**.

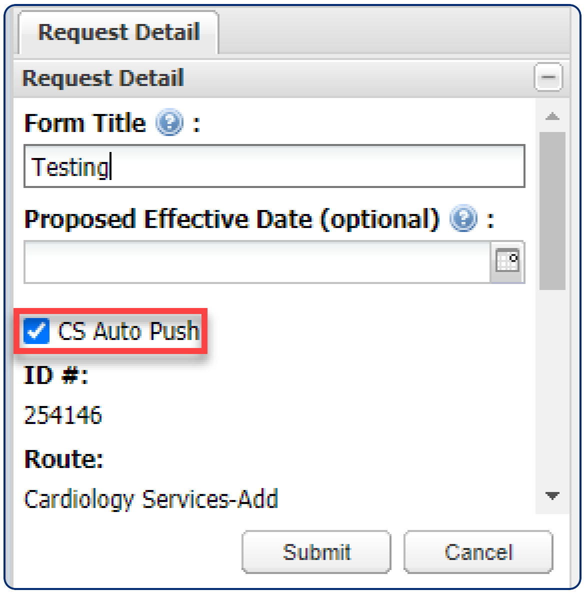


3. Click **OK** on the confirmation message.

Pushing Changes Using Change Requests

To push changes using a change request, submit a change request as usual for an item in the Corporate Standard file, and select **CS Auto Push** in the **Request**

Detail tab. Once the request has been approved, the changes will be pushed to the other CDM files.



Appendix C: Hospital Price Index (HPI)

Note: This appendix applies only to HPI Admin users.

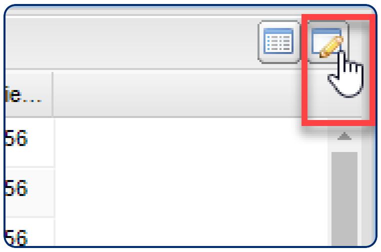
Hospital Price Index (HPI) is a tool that can assist with hospital price transparency compliance by analyzing your CDM, creating service packages and determining your shoppable items, and posting the required information to the **Chargemaster**, **All Service Items**, and **Shoppable Services** tabs of your hospital's HPI website.

Adding Items

To add items, in VitalCDM you will have access to an Admin file that populates the **All Service Items** and **Shoppable Items** tabs, and a CDM file that populates the **Chargemaster** tab for your HPI site.

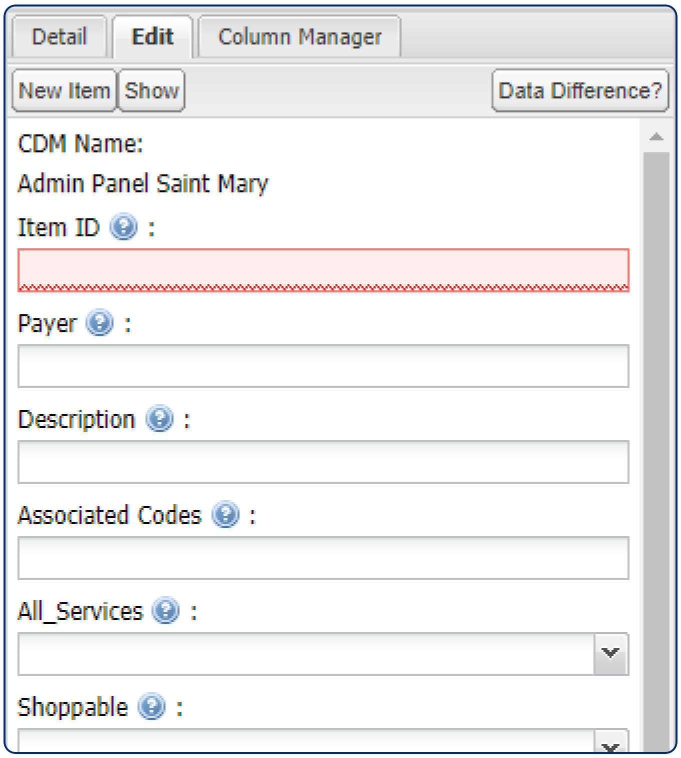
To add items for the **All Service Items** or **Shoppable Items** tabs, do the following:

1. Open your Administrator CDM file.
2. Click the **View Item Editing Tab** button in the upper right corner.

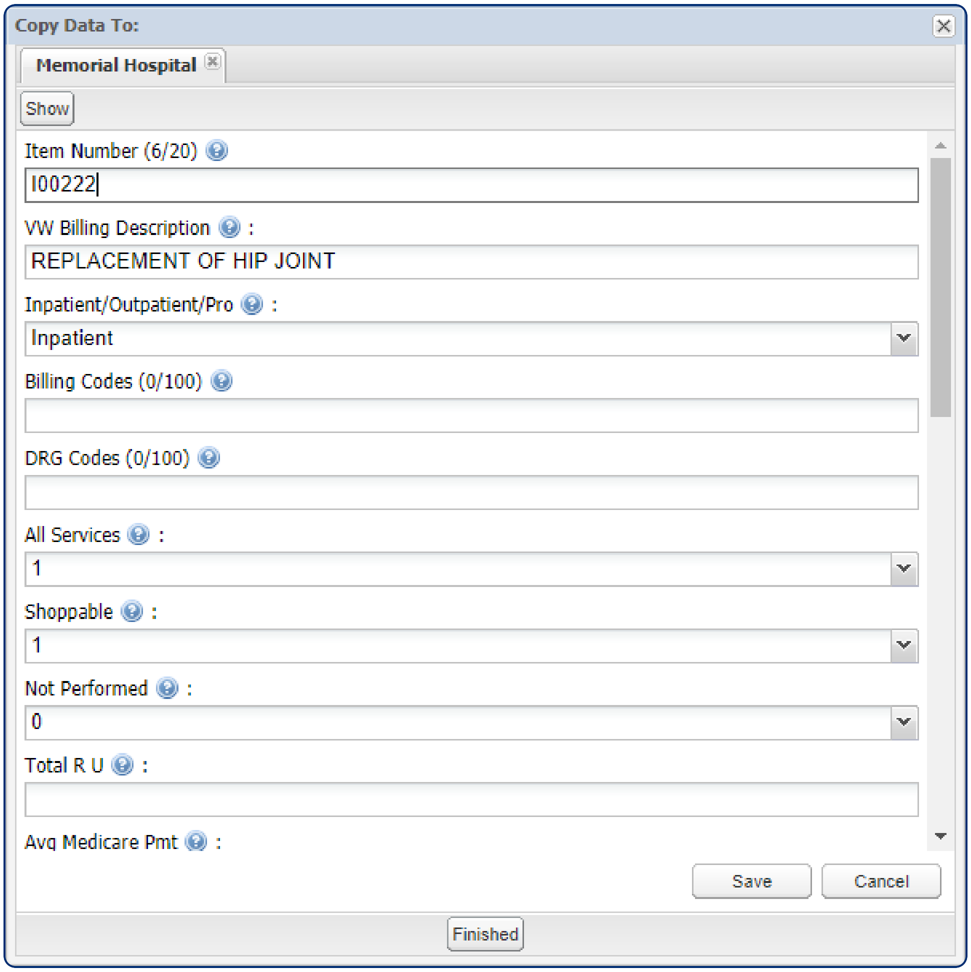


Note: If there is an existing item similar to the one you are creating, you can right-click the existing item and select **Add item > Manually (Edit Panel)**. This will copy the existing item's information into a new item, which you can then edit and save.

3. If an item is selected in the table, its information appears in the editing tab. Click **New Item** to enter information in the blank item. If no item is selected, a blank new item displays in the editing tab.



4. Enter information in the fields as necessary. For the **All_Services** and **Shoppable** fields, select **1** to include the item or **0** if the item should not be included.



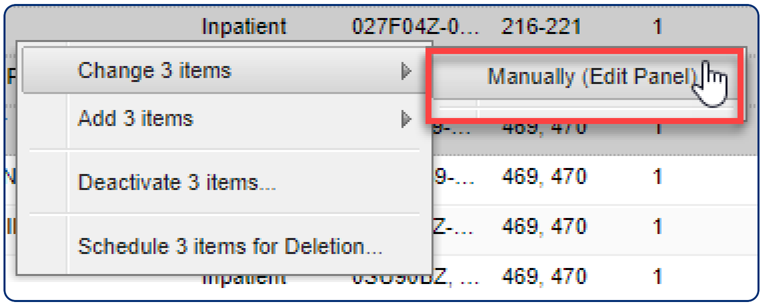
5. Set an item as **Not Performed** in order to override the item's price when it is published to the HPI site. If you set the **Not Performed** field to **1** and the item is included in your **Shoppable Items** tab, then **N/A** will display as the price for that item.
6. Click **Save**.

Editing Items

In VitalCDM, you will have access to an Admin file that populates the **All Service Items** and **Shoppable Items** tabs, and a CDM file that populates the **Chargemaster** tab for your HPI site.

To update items for the **All Service Items** or **Shoppable Items** tabs, do the following:

1. Open your Administrator CDM file.
2. Right-click the items you want to edit and select **Change (x) Items > Manually (Edit Panel)**.



3. Edit the fields as necessary. For the **All Service Items** and **Shoppable** fields, select **1** to include the item or **0** if the item should not be included.

> **Note**: The **Shoppable Items** tab can display primary items and the ancillary items associated with each. Reach out to your Client Success representative for more information about implementing this feature.

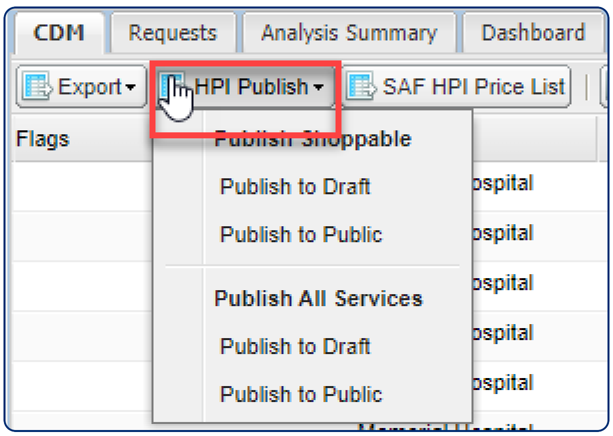
4. Set an item as **Not Performed** in order to override the item's price when it is published to the HPI site. If you set the **Not Performed** field to **1** and the item is included in your **Shoppable Items** tab, then **N/A** will display as the price for that item.
5. Click **Save**.

Publishing Items to the HPI Site

> **Note**: After you click one of the **Publish** buttons, your data will start publishing at the top of the next hour. The process runs every hour, seven days a week, between 4:00 am and 8:00 pm Pacific time, and it takes approximately 15 minutes.

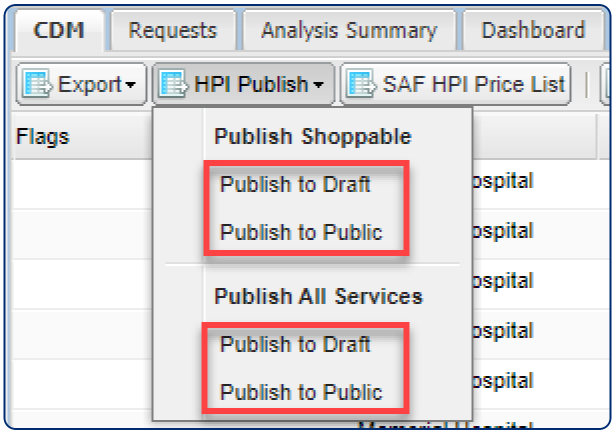
To push items to the **All Service Items** or **Shoppable Items** tabs, do the following:

1. Open your Administrator CDM file.
2. Click **HPI Publish**.



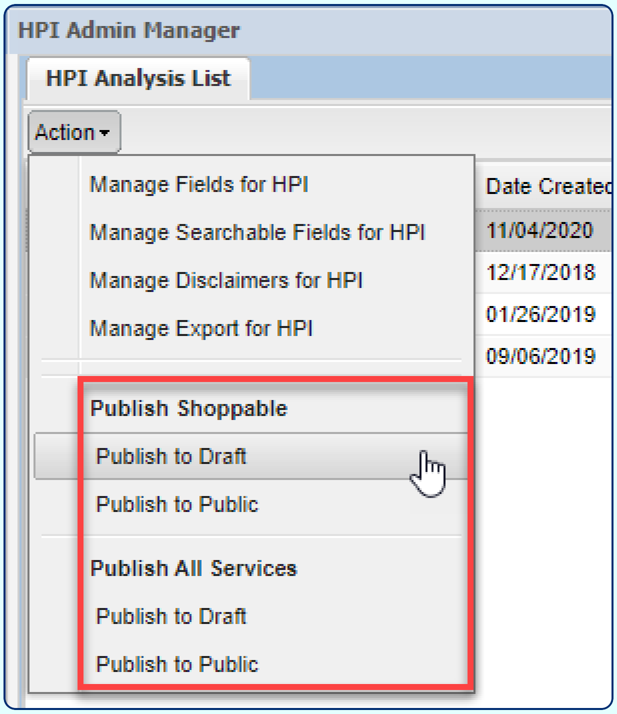
3. Click one of the following:
   - Under **Publish Shoppable**:
     - **Publish to Draft**. Publishes your **Shoppable** tab items to the draft website so that you can preview it. You will need to log in to this site with your Vitalware credentials; this site is not viewable by the public. The draft URL is similar to your public URL, except "hpi2" is replaced by "hpidraft."
     - **Publish to Public**. Publishes your **Shoppable** tab items to the public website, where anyone with the URL can view them.

- Under **Publish All Services**:
  - **Publish to Draft**. Publishes your **Service** tab items to the draft website so that you can preview it. You will need to log in to this site with your Vitalware credentials; this site is not viewable by the public.
  - **Publish to Public**. Publishes your **Service** tab items to the public website, where anyone with the URL can view them.



4. You will receive a message that your request has been received. Click **OK**.

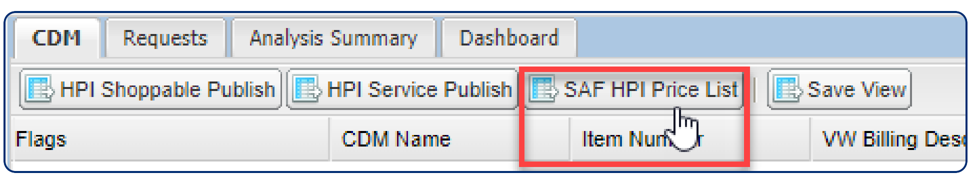
Note: You can also publish your **Shoppable** items and your **All Services** items from the **HPI Admin Manager**.



Viewing Items On the Standard Analytical Files (SAF) Price List

To view items that are included on Medicare's SAF price list, do the following:

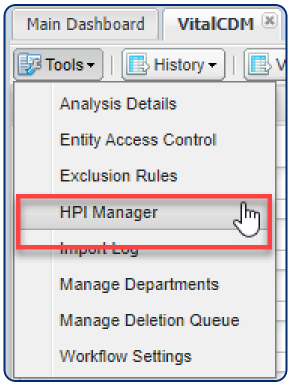
1. Open your Administrator CDM file.
2. Click **SAF HPI Price List**.



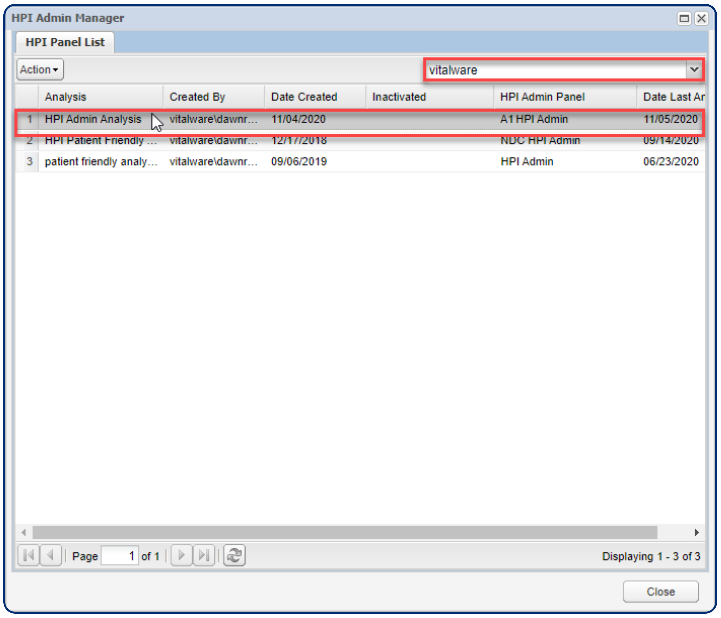
Changing the HPI Site Disclaimers

To change the text that appears in the disclaimers on your HPI site, do the following:

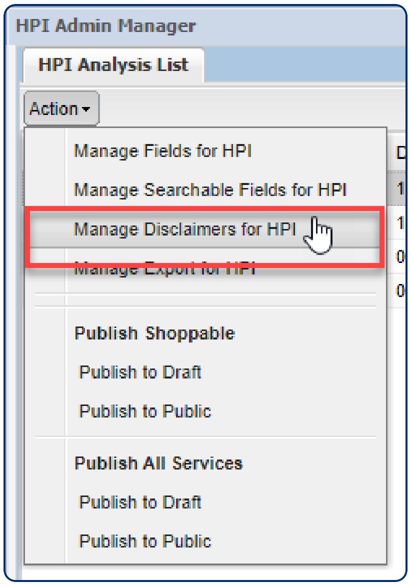
1. Open your Administrator CDM file.
2. Select **Tools > HPI Manager**.



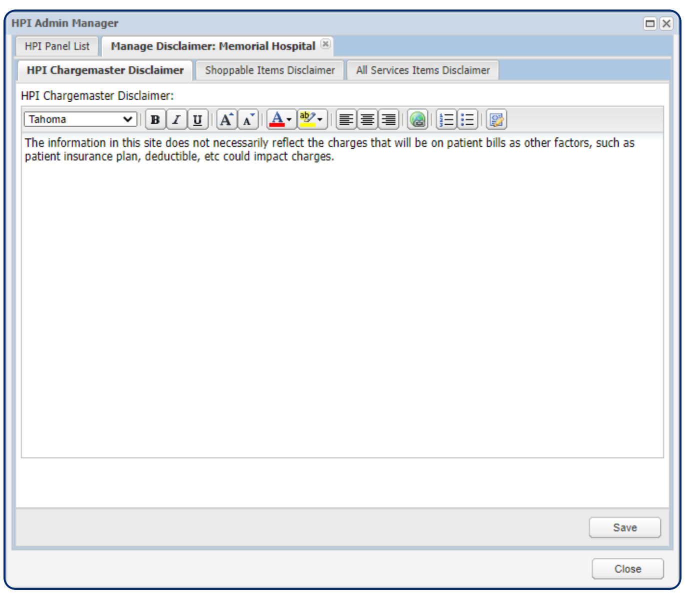
3. Select your Entity and your HPI admin file.



4. Select **Actions > Manage Disclaimers for HPI**.



5. Enter your separate disclaimers for the three tabs: **HPI Chargemaster Disclaimer**, **Shoppable Items Disclaimer**, and **All Service Items Disclaimer**. You can format text, apply list styles, and add links using the toolbar.

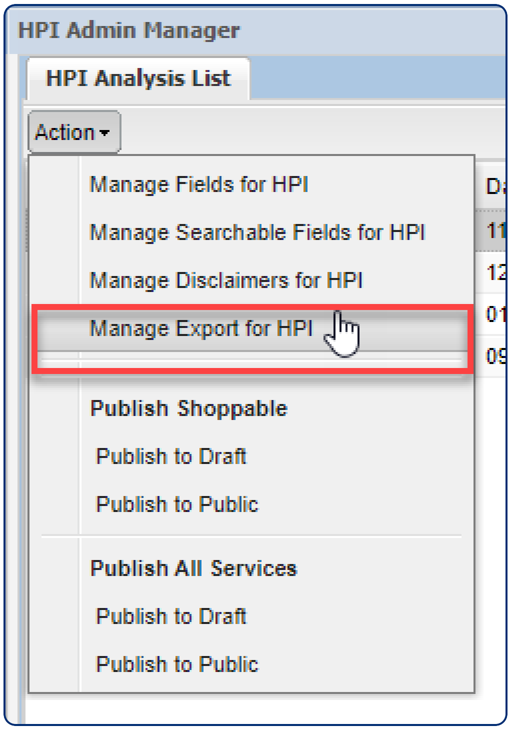


6. Click **Save**.

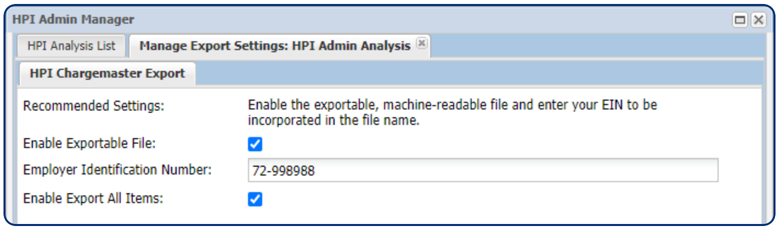
Managing Export Options

You can allow visitors to your HPI site to download the search results on your **All Service Items** tab. To set this up, do the following:

1. Go to **Tools > HPI Admin Manager**, select your HPI admin file, and select **Action** > **Manage Export for HPI**.

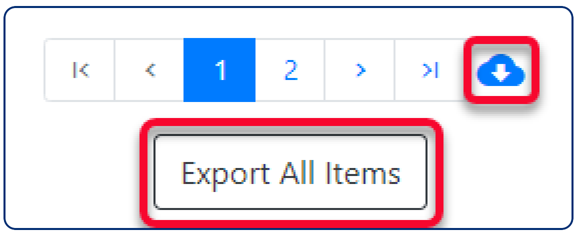


2. You have two options for export:
   - **Enable Exportable File**. Allows site visitors to export the results after searching the **All Service Items** tab.
   - **Enable Export All Items**. Allows site visitors to export **all** items included in your **All Service Items** tab, even if they haven't searched. This export will include both primary and ancillary items.



Note: The **Enable Export All Items** option allows site visitors to export all items on your **All Service Items** tab. The **Enable Exportable File** option allows site visitors to export only their search results on the **All Service Items** tab. Previously, to export all items a site visitor had to enter two asterisks (******) as a search term to display all items, and then click the blue cloud icon to export results. This new option gives site visitors a more straightforward **Export All Items** button to export all items without searching.

3. When both export options are enabled, an **Export All Items** button displays on the **All Service Items** tab. After a site visitor performs a search, the **Export Results** blue cloud button displays at the bottom of the results table for exporting results. Clicking either button downloads a .json file with the results.



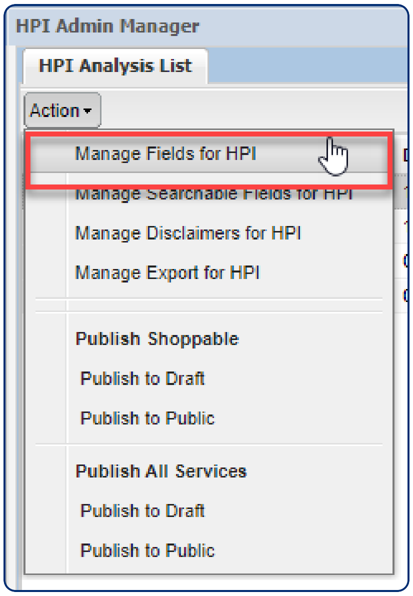
4. If you are viewing the non-public draft URL, you also have an option to export a CSV of your draft data.

Note: The CSV export is **only** for the draft URL.

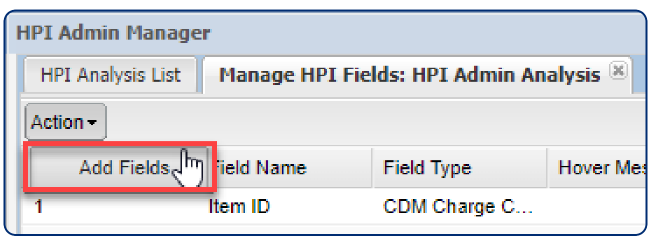
Managing HPI Fields

You can control which fields are available on your HPI site. To manage fields, do the following:

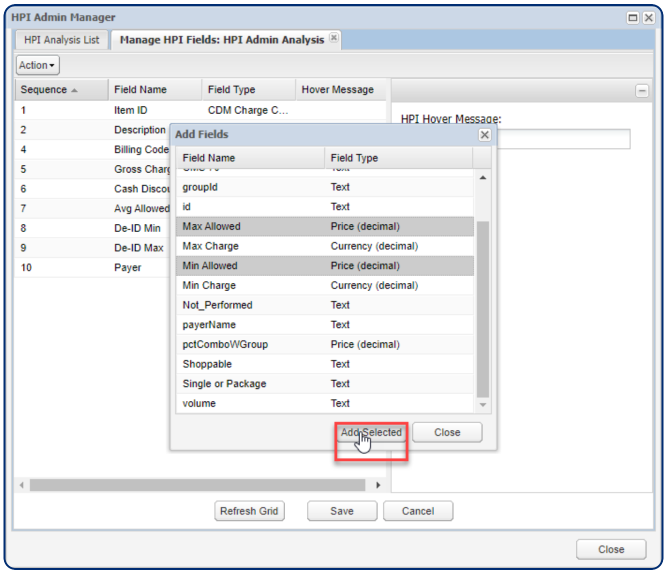
1. Click **Tools > HPI Manager**.
2. Select the HPI admin file and then select **Action > Manage Fields for HPI**.



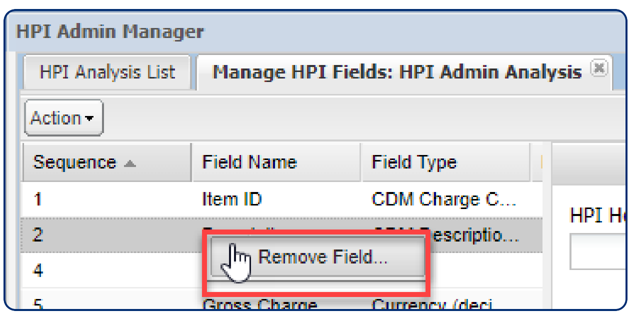
3. The **Manage Fields** tab displays. To add fields, select **Action > Add Fields**.



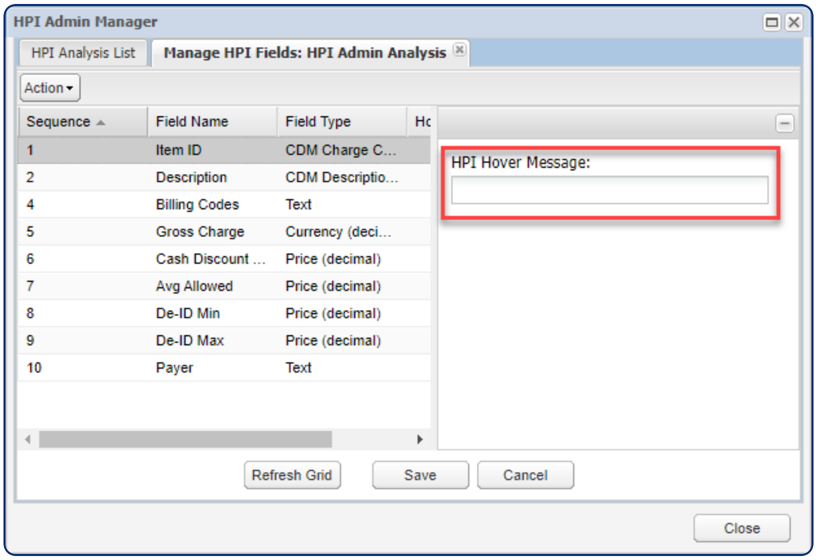
4. On the **Add Fields** window, select the fields you want to add, and then click **Add Selected**.



5. To remove a field, right-click the field and select **Remove Field...**. Then click **OK** on the confirmation message.



6. To change the text that will display when visitors to your HPI site hover over each field, select the field and then enter text in the **HPI Hover Message** field.

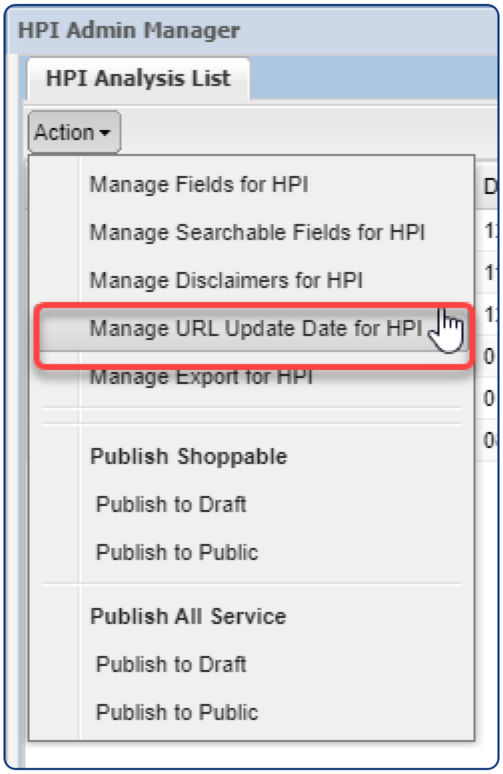


7. Click **Save** to save your changes.

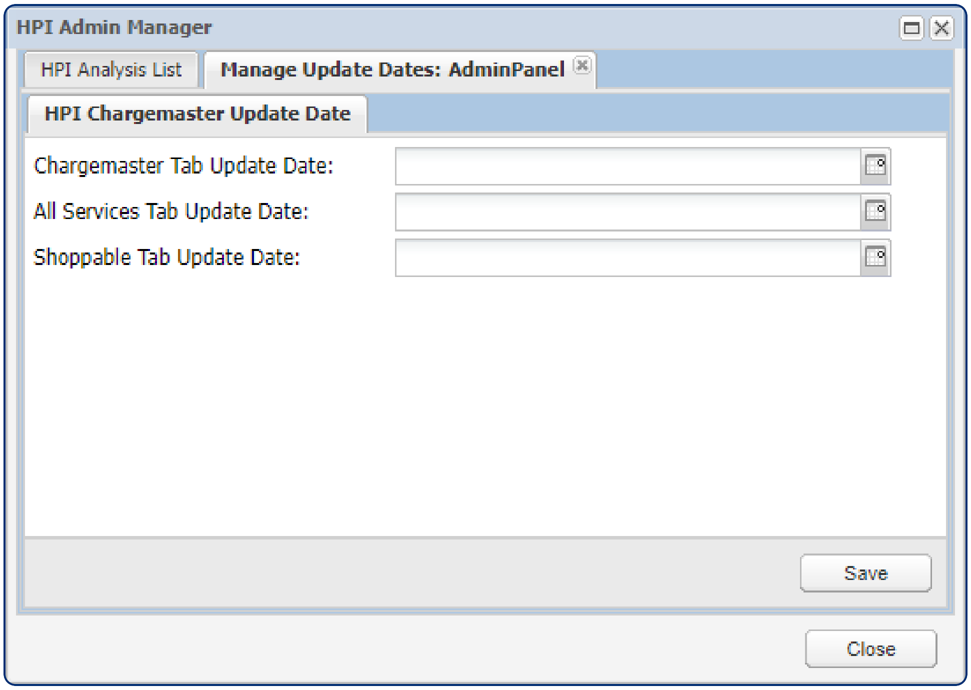
Managing the URL Update Date

You can adjust the **Last Updated** date that displays on each tab of your HPI site.

1. Click **Tools > HPI Manager**.
2. Select the HPI admin file and then select **Action** > **Manage URL Update Date for HPI**.



3. On the **Manage Update Dates** tab, set the date you want to display on each of your HPI site tabs.



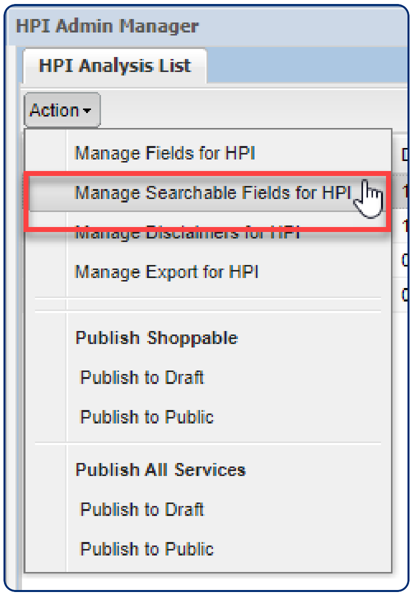
4. Click **Save**.

Managing HPI Filters

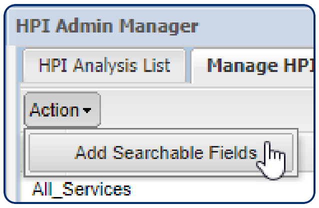
You can add searchable fields to your HPI site to include information that is not viewable by people visiting your HPI site.

> **Example**: Someone visiting your site is looking for **cisplatin**, a common chemotherapy drug. Your HPI site has **chemotherapy drug** as a generic term, but not **cisplatin** specifically. You can add a secondary description field to your HPI searchable field for specific examples, and on your **chemotherapy drug** item add **cisplatin** (as well as others as necessary) in this field. The secondary description field, containing **Cisplatin**, will not appear on your HPI site unless you have included it in your managed fields to display, but a search for **cisplatin** will return your **chemotherapy drug** item.

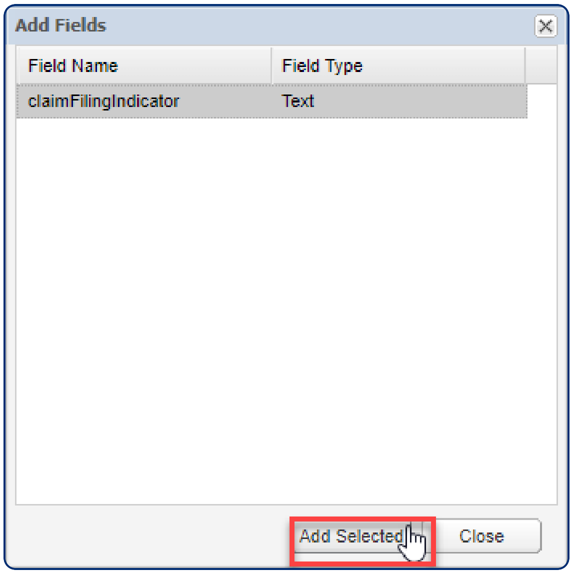
1. Click **Tools > HPI Manager**.
2. Select the HPI admin file and then click **Action > Manage Searchable Fields for HPI**.



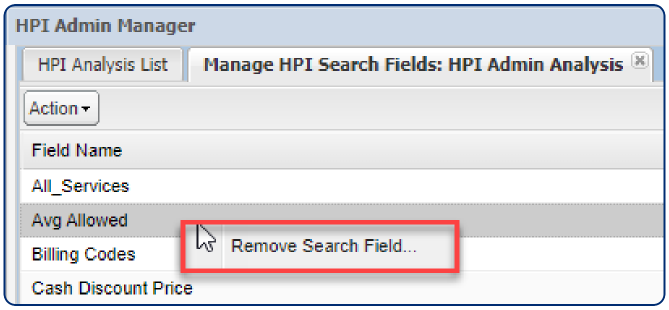
3. The **Managing Filters** tab displays. To add filters, select **Action > Add Searchable Fields**.



4. On the **Add Fields** window, select the fields you want to add, and then click **Add Selected**.



5. To remove a field, right-click the field and select **Remove Filter Field...**. Then click **OK** on the confirmation message.



6. Click **Save Filters** to save your changes.

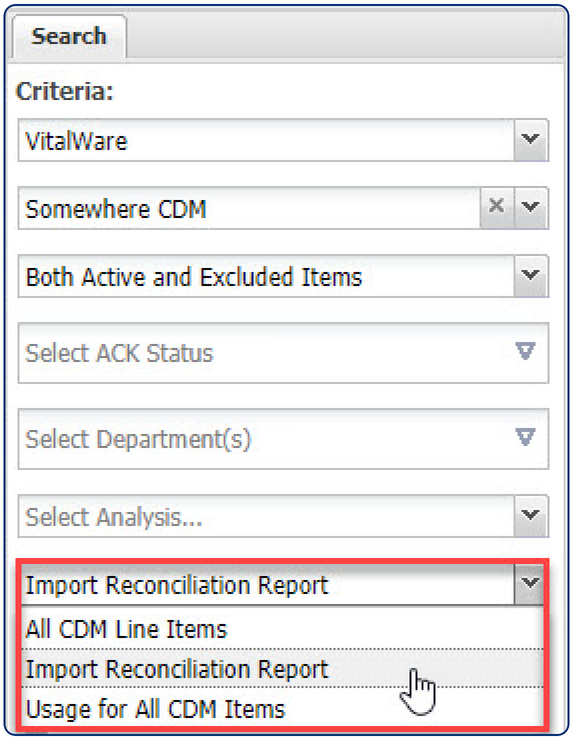
Appendix D: Reconciliation Reports

The Reconciliation Feature within VitalCDM is role-based and allows persons who have been granted the reconcile module the opportunity to review transactions coming in to VitalCDM from an import of their CDM file. Any differences from the items within VitalCDM will be flagged and placed in a hold process until the transaction is either applied or ignored or another Import file is received.

The following items fall into Reconciliation:

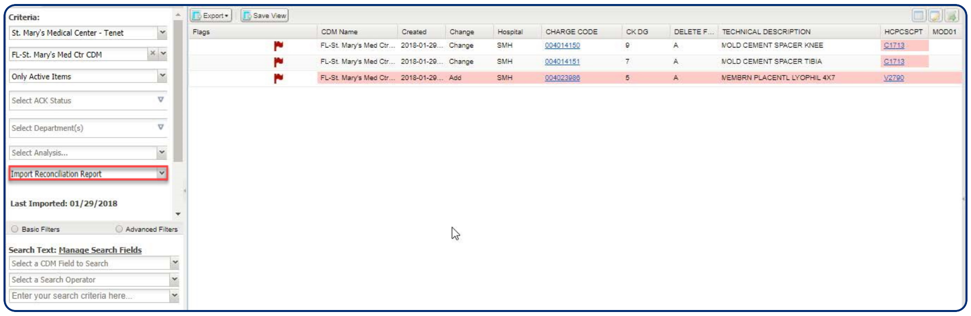
- Additions (from CDM, not housed in VitalCDM)
- Changes (any field in the CDM file that differs from the value in VitalCDM)
- Reactivations (if inactive in VitalCDM, and the CDM is trying to send the item as active)
- Inactivations (if active in VitalCDM, and the CDM is trying to send the item as inactive)

Any item that falls within the above criteria will be marked with a red flag icon and will display in the **CDM** tab under **All CDM Line Items** (exposed to all users). This red flag is an indicator to warn users that the item has changes pending. If the item is updated via manual change or a request prior to application of reconcile, the changes that would have been applied upon reconcile are nullified. A specific report labeled **Import Reconciliation Report** also displays under the CDM tab, but limits the results to only those items in a state of pending reconciliation.



The report displays as seen below and can be filtered just like any other VitalCDM report. There is also a field labeled **Change** that displays a value of **Change**, **Add**, **Activated**, or **Inactivated**.

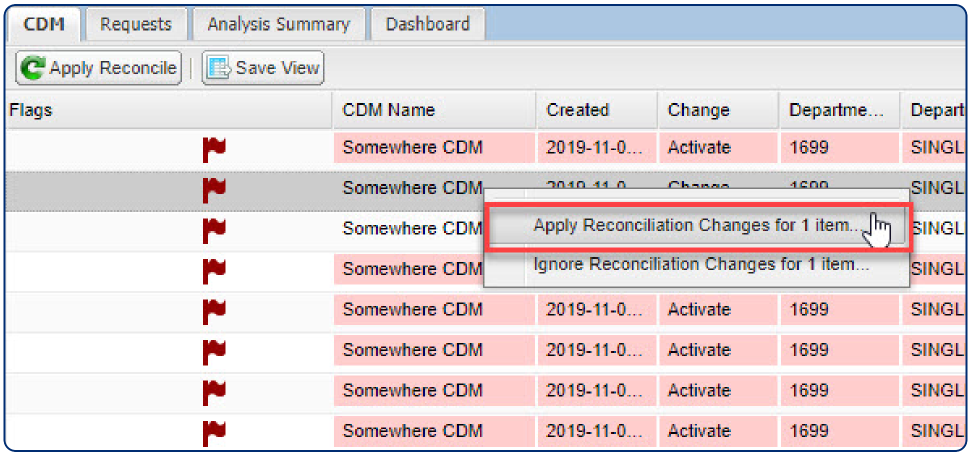
> **Note**: If multiple primary file imports come in prior to reconcile being completed, the newest file is applied and previous changes are ignored. Merge files will compile with the primary file for reconciliation purposes.



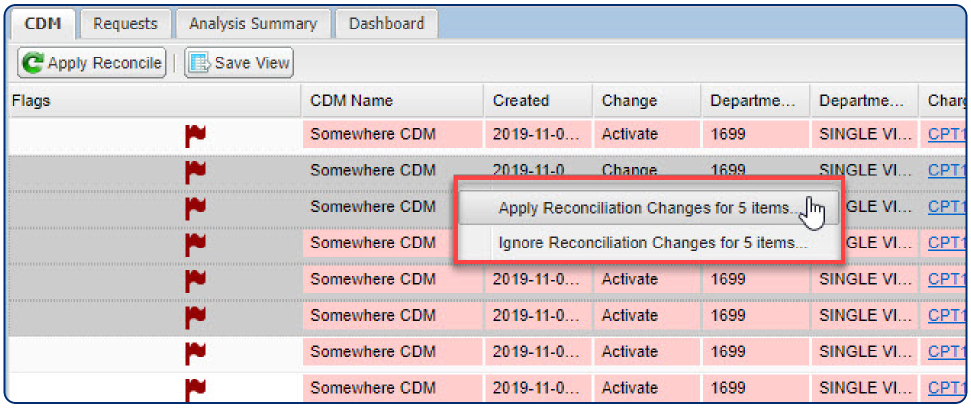
Applying Reconciliation

To accept and apply the updates for an item currently in reconciliation, right-click the item in the **CDM** tab table and select **Apply Reconciliation Changes**

for 1 item....

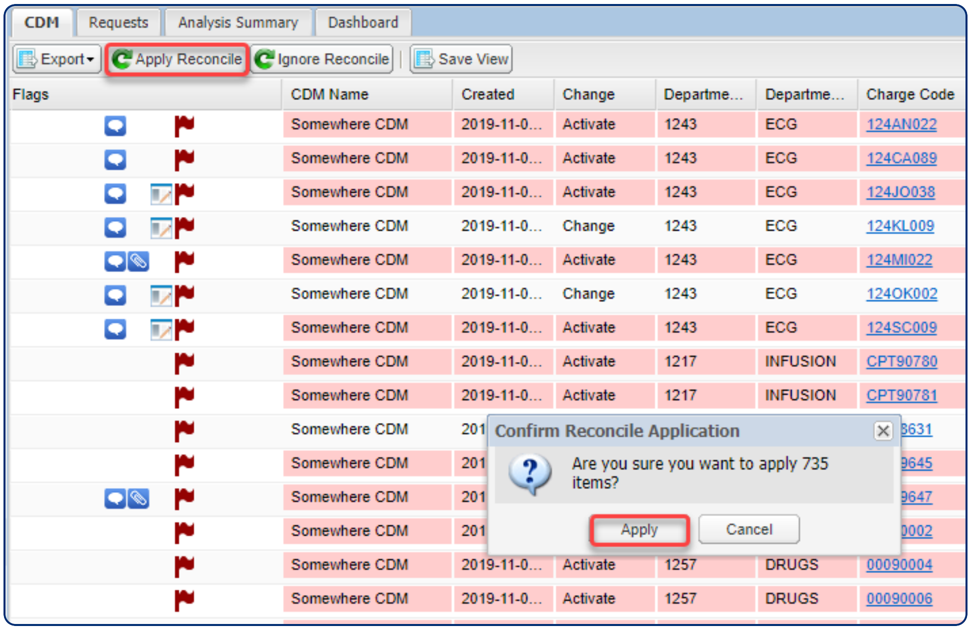


You can apply multiple line items at once by highlighting multiple lines. The number of items impacted will be reflected in the right-click menu.



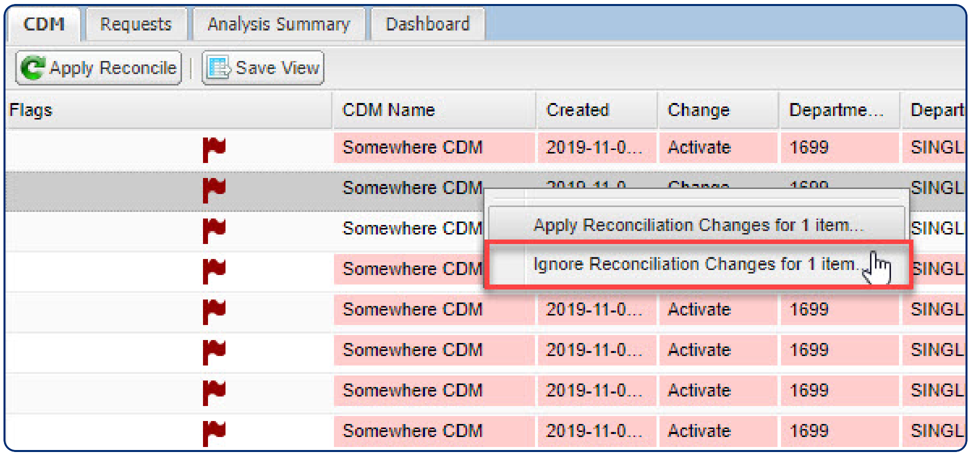
You can also approve the entire list of CDM line items in the Reconciliation report at once. This will work for all items (unfiltered) or a filtered subset of items, and it will display a count of items to reconcile for user validation.

Note: The Apply Reconcile feature may take some time to complete. Once the process is complete, you will receive an email confirming the number of items that were reconciled.

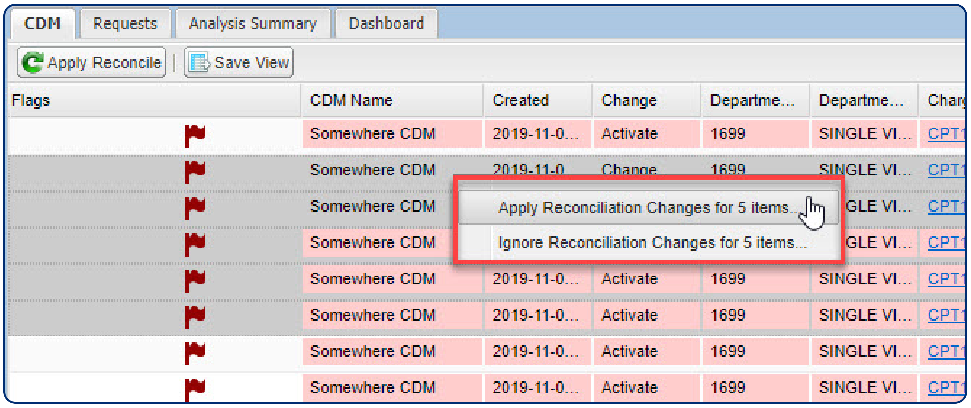


Ignoring Reconciliation

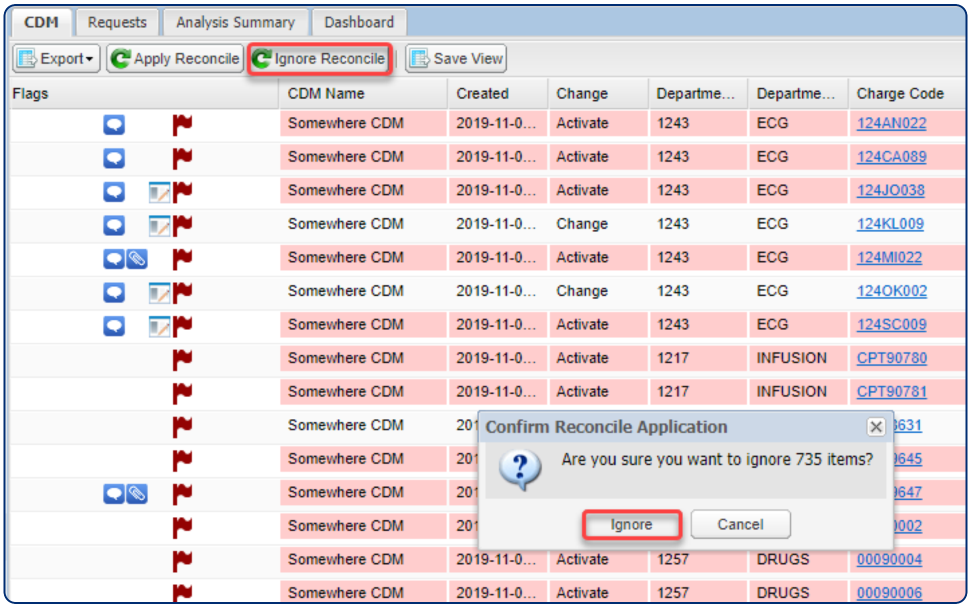
To ignore an item currently in reconciliation, right click the item in the CDM tab grid and select **Ignore Reconciliation Changes for 1 item...**.



You can ignore multiple line items at once by highlighting multiple lines. The number of items impacted will be reflected in the right-click menu.



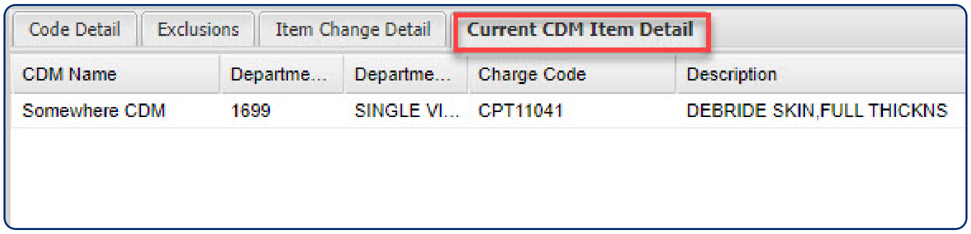
You can also ignore the entire list of CDM line items in the Reconciliation report at once. This will work for all items (unfiltered) or a filtered subset of items, and it will display a count of items to reconcile for user validation.



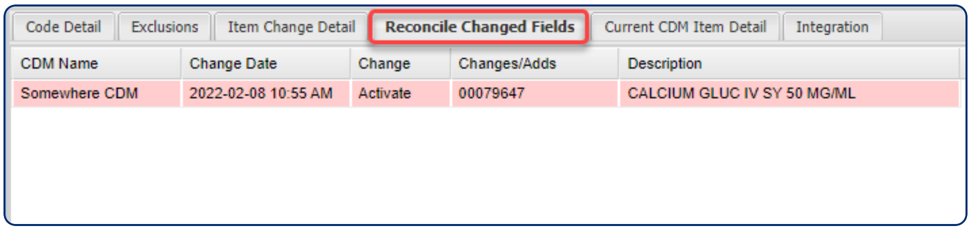
Viewing the State of Reconciliation

In order to view the current state of an item in the reconciliation report, you can access the lower panel by clicking on the Charge Code of any item in the grid. There are two tabs you can review:

- **Current CDM Item Detail**. This tab displays the line item's current state in VitalCDM.

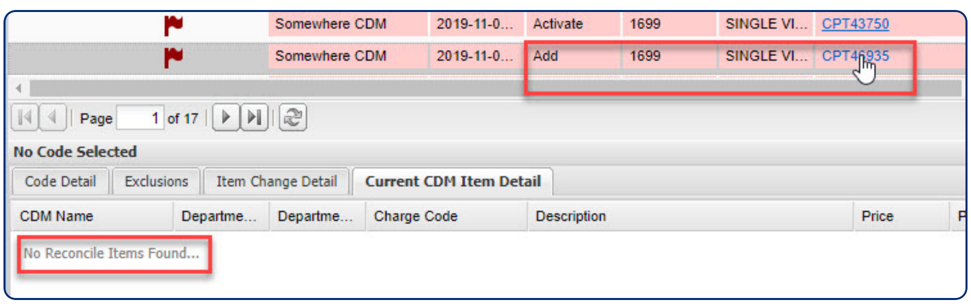


- **Reconcile Changed Fields**. This tab shows the ID fields, the CDM description, and all fields that have changed. The changed fields will show the new, imported data.



Additions

If an item in the results grid is labeled as an **Add**, and the item is entirely highlighted in pink, then the item is new to VitalCDM and will not display a value in the **Current CDM Item Detail** tab because there is nothing to reference.



- If applied, the grid will refresh and remove the item from the report. The red flag will be removed and the item will also be now reflected in VitalCDM when searching in that CDM file.
- If ignored, the grid will refresh and remove the item from the report. The item will not be in the **CDM** tab under any report.

Changes

If an item in the results grid is labeled as a **Change**, and the item has random fields highlighted in pink representing the fields that will have changed a value based on the incoming CDM file, the item is referencing an existing item in VitalCDM. To review, click the charge code and the **Current CDM Item Detail** tab will display VitalCDM's current values.

- If applied, the grid will refresh and remove the item from the report. The red flag will be removed and the item will also be refreshed in VitalCDM when searching in that CDM file to display the new values.
- If ignored, the grid will refresh and remove the item from the report. The item will continue to display the values that were already present in VitalCDM.

Reactivations

If an item in the results grid is labeled as an **Activate**, and the item is entirely highlighted in pink, then the item is currently inactive in VitalCDM.

- If applied, the grid will refresh and remove the item from the report. The red flag will be removed and the item will also update in VitalCDM to be Active when searching in that CDM file.
- If ignored, the grid will refresh and remove the item from the report. The item will remain inactive in the CDM tab under any report.

Inactivations

If an item in the results grid is labeled as **Inactivate**, and the item has the **Delete Flag** field highlighted in pink (representing the fields wanting to change the status of the item from **Active** to **Inactive**), then the item is referencing an existing item in VitalCDM that is currently **Active**, and the imported file would update the item status to **Inactive**. To review, click the charge code and the **Current CDM Item Detail** tab will display VitalCDM's current values.

- If applied, the grid will refresh and remove the item from the report. The red flag will be removed and the item will also update in VitalCDM to be inactive when searching in that CDM file.
- If ignored, the grid will refresh and remove the item from the report. The item will remain active in the CDM tab under any report.

> **Note**: Any edit (or request approval) of an item in reconciliation will remove the red flag and ignore ANY fields identified as pending change via the imported file.

Rolling Back an Import with Reconcile Data

If you roll back a reconciliation import, the following will occur:

- If an item is not in the reconcile import and you make a change to it, then the rollback will not affect that item's change. Changes applied after reconcile will remain in place after the rollback for this item.
- If an item is in the reconcile file and the following occurs:
  1. The reconcile is applied.
  2. The item is further changed manually or via a request.
  3. Rollback is initiated.

  Then **all** changes to that item are removed. Any changes to a reconciled item after you apply the reconcile are lost to the rollback.

- If an item is in the reconcile import and the following occurs:
  1. The item is changed manually or via a request.
  2. **Then** you attempt to apply the reconcile.
  3. **Then** rollback is initiated.

  Then the reconcile data is removed from the item during the manual change/request. This means the connection to the reconcile import is removed, and the rollback will have no effect on the item that was changed.

If you need any assistance with user management, please reach out to your Vitalware Account Manager or to the team at vw-cs@healthcatalyst.com.

Appendix E: Troubleshooting/Did You Know?

Product Release Schedule

Product enhancements, new features, and bug fixes are released to the live software environment every other Thursday afternoon.

> **Note**: Due to the upcoming holidays, some releases for the next three months will be adjusted. Dates in bold font below do not follow the regular two-week release schedule.

The next two **Release Dates** are:

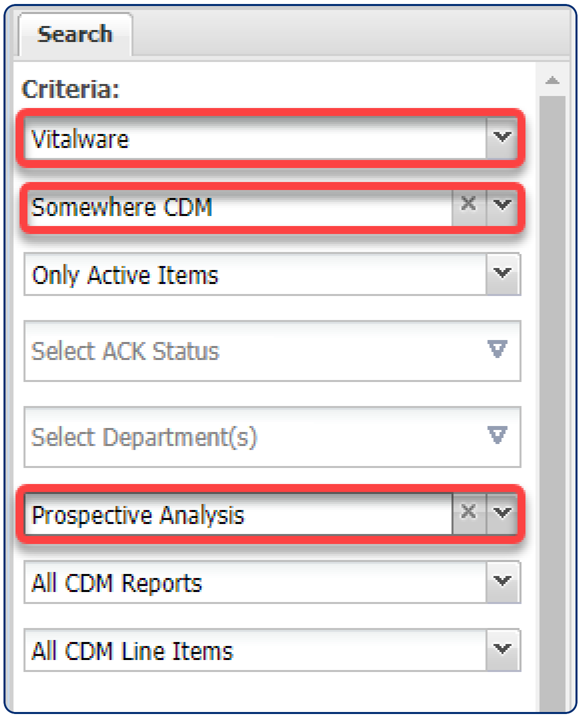
- **November 30, 2023** (no release on November 23, 2023)
- December 14, 2024

Adding Analysis Fields

As a VitalCDM end-user, you have the capability to add analysis-type fields without limiting line items by a specific report. Additionally, you can create a saved view with any fields you may have added.

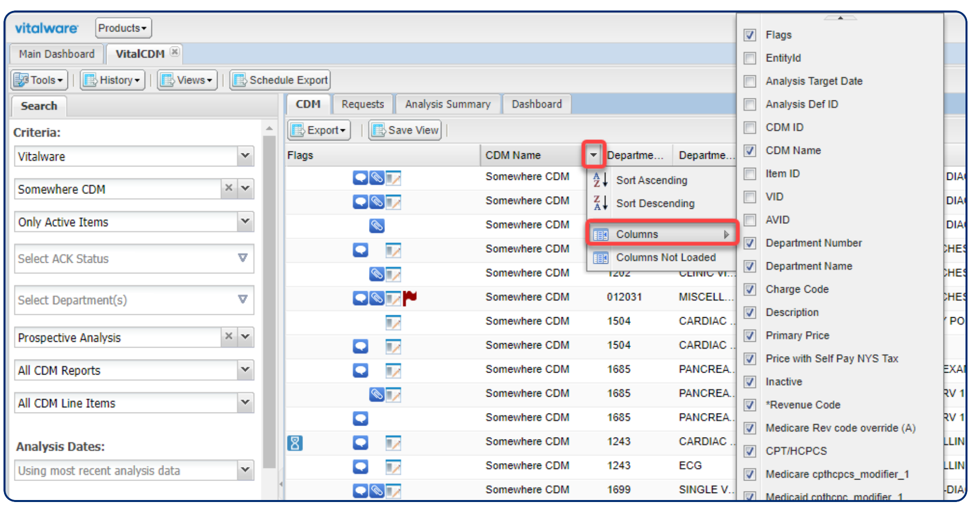
Adding Fields

When in VitalCDM, select the appropriate entity, the appropriate CDM, and an analysis.



Click **Search** to return the specific analysis data.

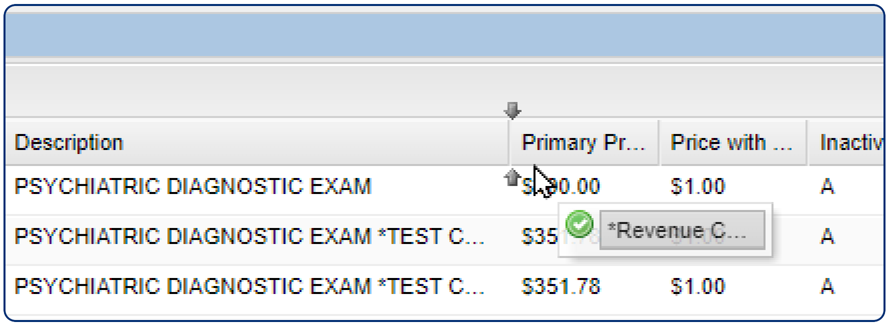
Hover over a column header within the grid on the right-hand side of the screen and click the Black down arrow. You will then hover over Columns. A list of columns will pop up and you have the option to remove or add any columns by checking the box next to the column name. The columns selected will be brought in at the end of grid.



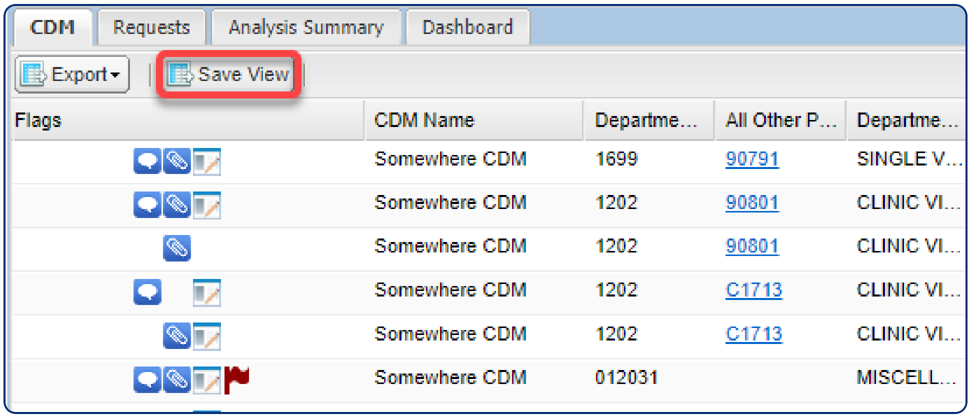
Creating a Saved View

You have the capability to save custom views that include columns added or removed from the grid as well as any sorting or filtering criteria applied.

To adjust the column order, select the column header and then drag and drop the column into your preferred position. The green arrow indicates a successful drop location.



Now that you have your column headers in the order of your liking, click **Save View** in the upper left-hand corner of the grid.

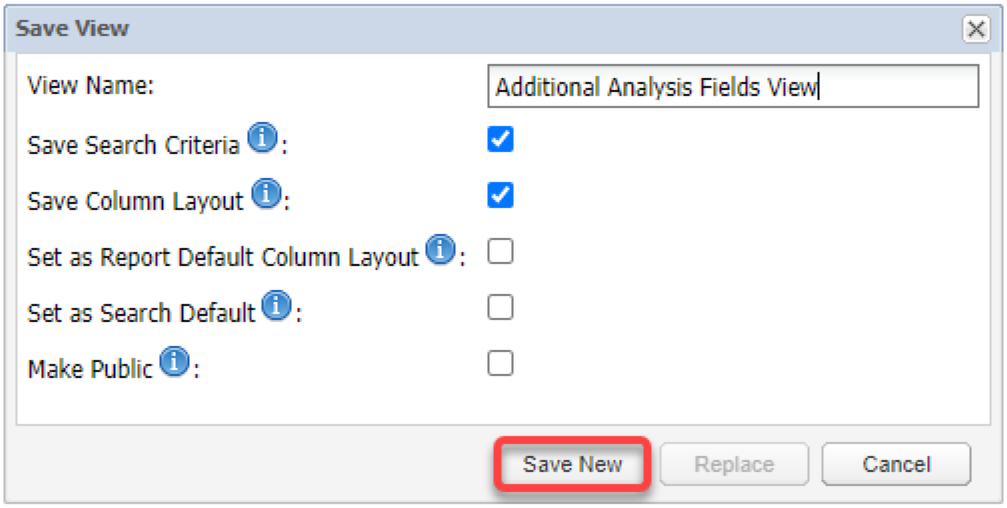


A window will pop up where you will enter a name for this specific view, which is required. You can select from the following options:

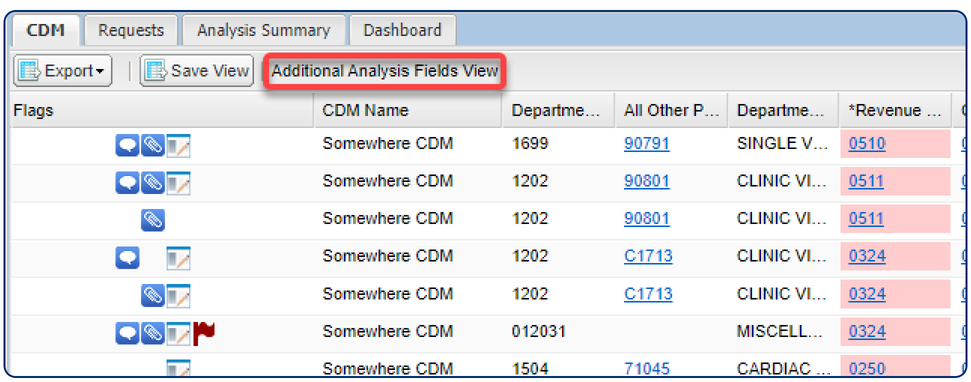
- **Save Search Criteria**: Selections in the left panel
- **Save Column Layout**: Column order and sort criteria
- **Set as Report Default Column Layout**: If a report was being used, checking this box will make the grid the default when selecting that report

- **Set as Search Default**: Will default the grid as your view when entering VitalCDM
- **Make Public**: Limited to Admin users. Makes the view accessible to all CDM users at the organization.

Next, select **Save New**.



Once you save your view, the name will appear next to the **Save View** button to let you know what view you are seeing in the grid with the specific column layout.



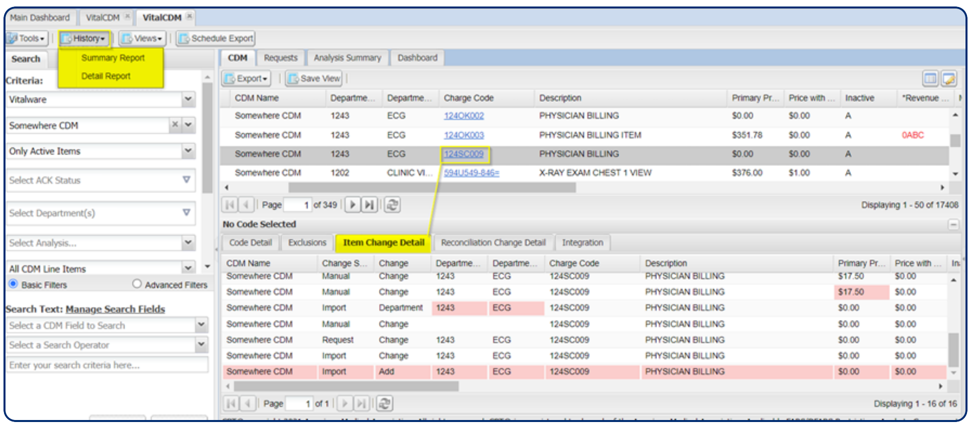
For assistance to add Analysis Fields without limiting line items by selecting a specific report, or to create a saved view, please contact your Product Implementation Consultant or Client Success Manager directly, or email vw-cs@healthcatlayst.com.

History Tracking in VitalCDM

Within VitalCDM, you can view either a **Summary History Report** or a **Detailed History Report**. The Summary History Report displays the current version of the records in comparison to the last known version whereas the Detailed History Report shows each version of the record within the specified time frame.

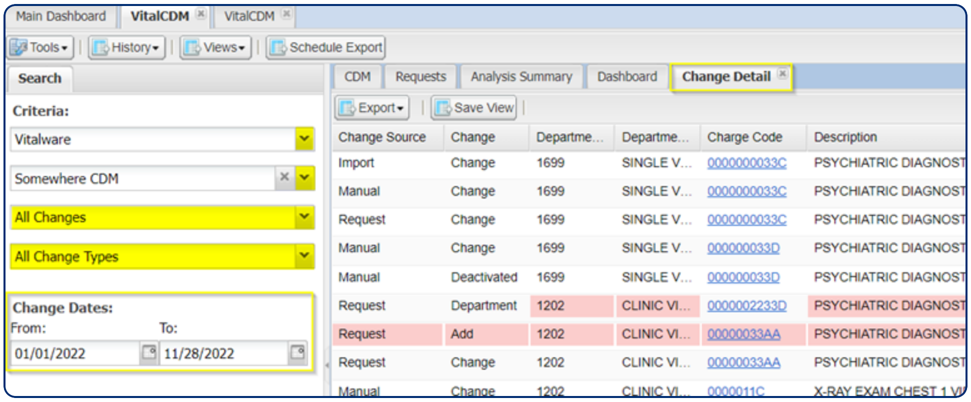
Accessing the History Reports

When in VitalCDM, select the **History** drop-down in the top left corner and open either the **Summary Report** or the **Detail Report**. The Detail History Report for a record is also available in the **Item Change Detail** tab of the lower panel.



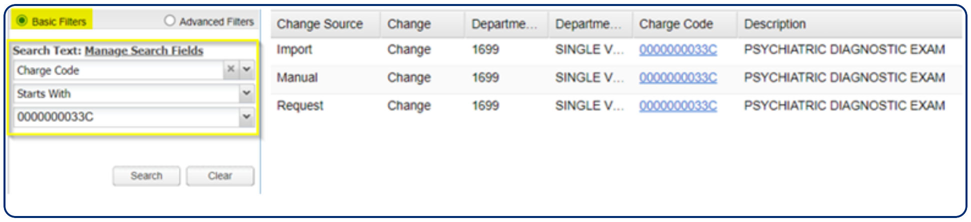
Navigating the History Reports

After selecting the preferred Entity/CDM you can filter from **All Changes** to a particular change method (**Request**, **Manual**, or **Import**) or from **All Change Types** to either **Adds**, **Changes**, or **Deactivations**. Additionally, you can filter to a specified time frame for auditing and reporting purposes.

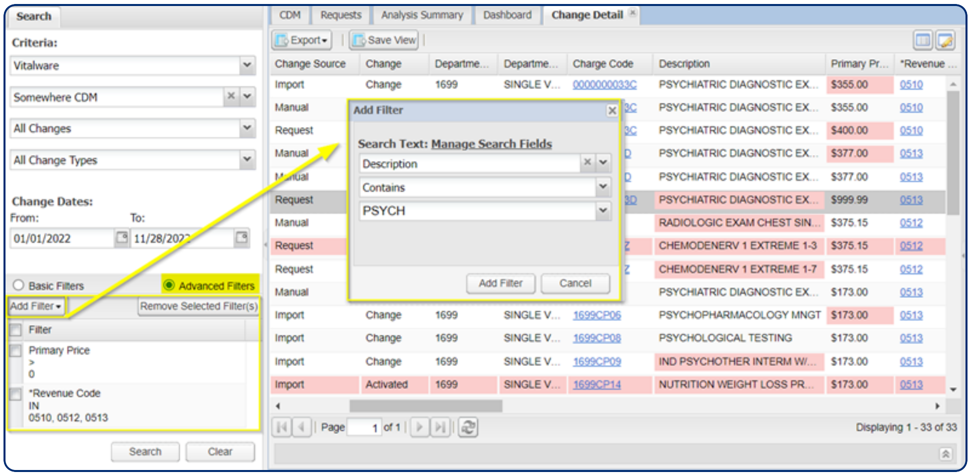


The Basic and Advanced Filters allow you to search the CDM data in the grid. The **Basic Filters** allow for a single search whereas the **Advanced Filters** allow for more than one entry of criteria to be entered.

Basic Filters:

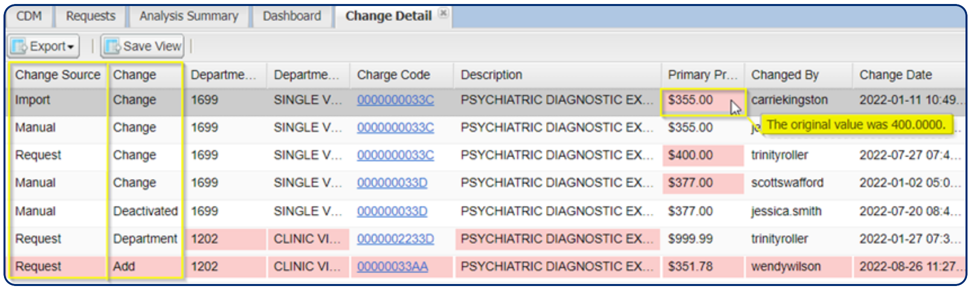


Advanced Filters:



Viewing the History Results

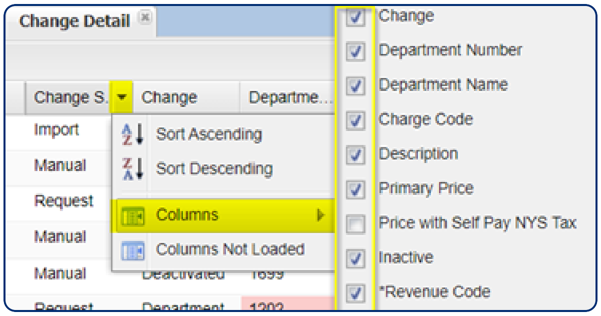
Within the results grid, you can see the source and type of change as well as the specific fields impacted based on the pink shading - new adds would display as a pink row. You can hover over any of the highlighted cells and view what the original value was.

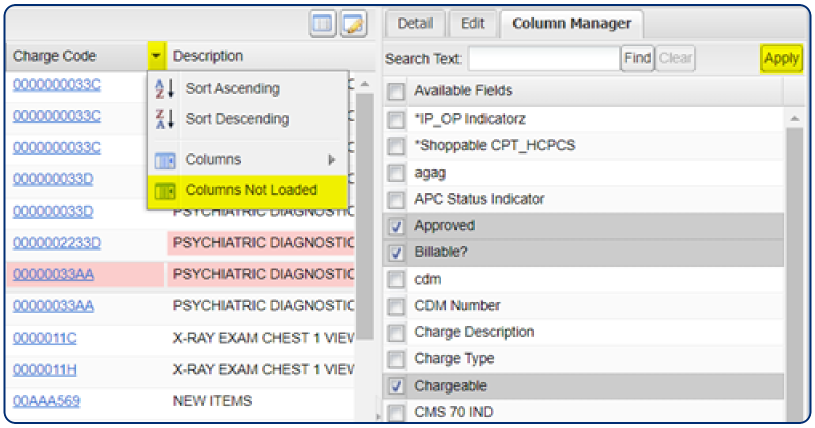


Additional fields used for auditing: Who made the changes and when (Changed By, Change Date) Requestor, Notes, etc are also available in the far right of the grid.

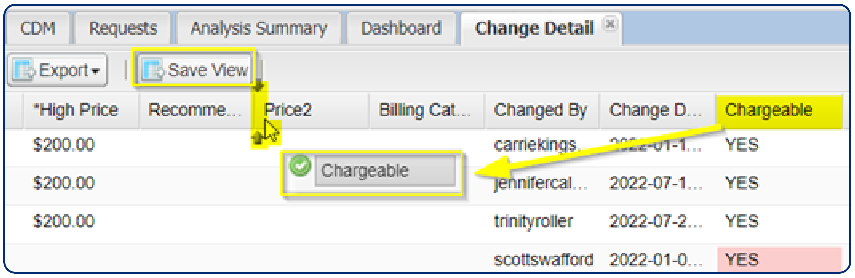
Customize and Save Views

When hovering over any column header a dropdown arrow will appear allowing you to sort by that field, adjust the columns that are currently displaying, or access **Columns Not Loaded**.





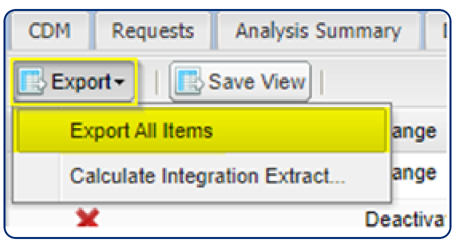
After adding or removing columns you can customize your view by dragging and dropping the columns into your preferred order and saving that view.

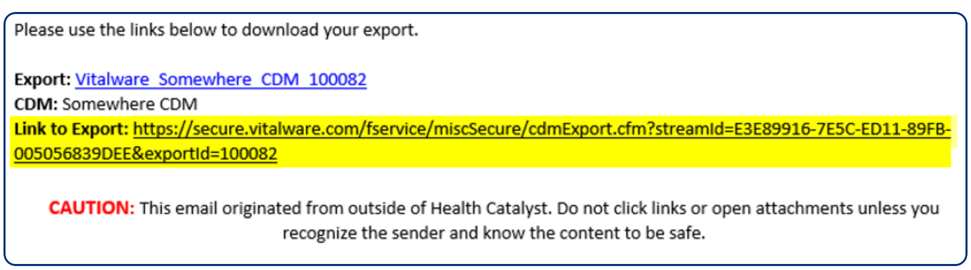


> **Note**: When saving your view, it will also hold the dates in the left panel which may need to be adjusted during your next use or prior to using scheduled exports.

Exporting the History Reports

You have the option to export this report into an Excel Document. Click on Export in the upper left-hand corner of the results panel and select **Export All Items**. You will receive an email from vw-support@healthcatalyst.com when your export is ready for download.




Please use the links below to download your export.

Export: Vitalware_Somewhere_CDM_100082
CDM: Somewhere CDM
Link to Export: https://secure.vitalware.com/fservice/miscSecure/cdmExport.cfm?streamId=E3E89916-7E5C-ED11-89FB-005056839DEE&exportId=100082

CAUTION: This email originated from outside of Health Catalyst. Do not click links or open attachments unless you recognize the sender and know the content to be safe.

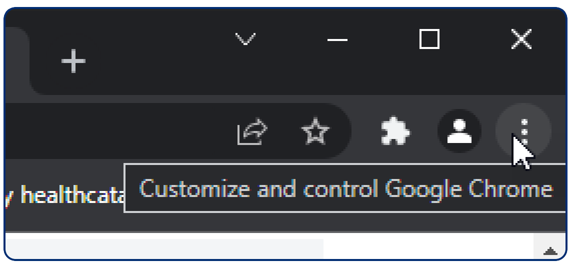
Troubleshooting a Blank Dashboard

If the Vitalware dashboard appears blank, there are several steps you can take to resolve the issue. In addition to the following, you may also restart your computer if you have not done so recently.

Chrome: Clearing Your Browser Cache

If you are using Chrome, clearing your cache and cookies may resolve this issue. To clear your cache and cookies in Chrome, do the following:

1. Click the **vertical ellipsis ⋮** in the top right corner of Chrome.

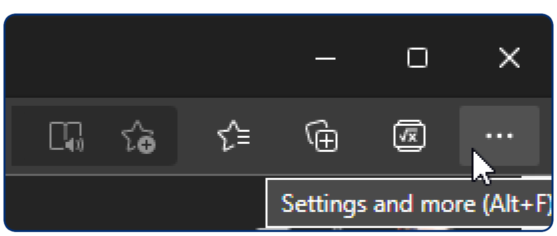


2. Select **More tools** > **Clear browsing data**.
3. Select a **Time range**. To delete all data, choose **All time**.
4. Select both **Cookies and other site data** and **Cached images and files**.
5. Click **Clear data**.

Microsoft Edge: Restore Settings to Default

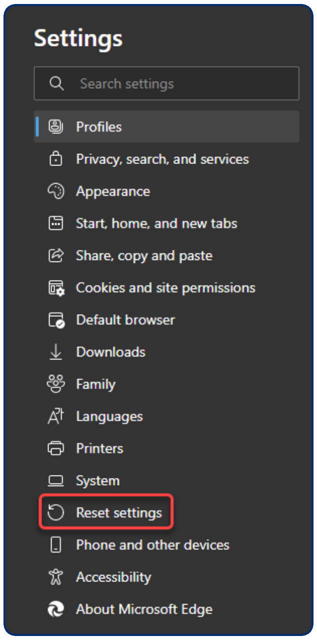
If you are using Microsoft Edge, you can try restoring your settings to the defaults.

1. Click the **ellipsis ...** in the top right corner of Microsoft Edge.



2. Click **Settings**.

3. Click **Reset Settings**.



4. Click **Restore settings to their default values**.
5. Relaunch Edge.

Hard Refresh May Solve Several Issues

A hard refresh is a way of clearing your browser's cache and forcing it to load the newest version of a product screen (webpage).

If you still have a blank dashboard, you receive an error such as "Http failure response..." when attempting to open your product, or you don't see release updates in your product, you should do a hard reload to clear your browser cache.

Use the following command for your operating system to perform a hard reload:

- **Windows** (Chrome, IE, Edge, Firefox)
  - **Ctrl** + **Shift** + **R**
- **Mac** (Chrome, IE, Edge, Firefox)
  - **Command** + **Shift** + **R**

Tip: Commands with plus signs (**+**) indicate you should hold down each key as you press the additional keys.

Checking VPN

If clearing your cache/cookies and performing a hard refresh do not resolve your issue, see if you are logged in to the company VPN. If you are, then log out, or try logging in to the Vitalware site on a device that is not logged in to the company VPN. If you can log in from an alternate device and the dashboard appears normal, you may need to reach out to your IT department.