



powered by **MGMA**

DATA COLLECTION

USER GUIDE | 2025



NEW DATADIVE DATA COLLECTION AUTOMATION

Data Collection is now easier than ever! Integrating cumulative feedback over the years, we've redeveloped the data collection process for survey participation to be flexible to your needs. The platform can now accept and process ANY file type, including new MGMA templates, exports pulled directly from practice systems and even home-grown reports. After review of your Practice Demographics, you'll be guided through a simple, four-step process:

1. Upload Files
 - Compensation / Payroll / Census Data
 - CPT / Billing / Claims Data
 - Financial Operations (formerly Cost & Revenue and Operations) / P&L / Income Statement / General Ledger
2. Mapping Crosswalk
3. Data Cleanup
4. Data Review

For in-depth instructions, we created this helpful guide to walk you through the process!

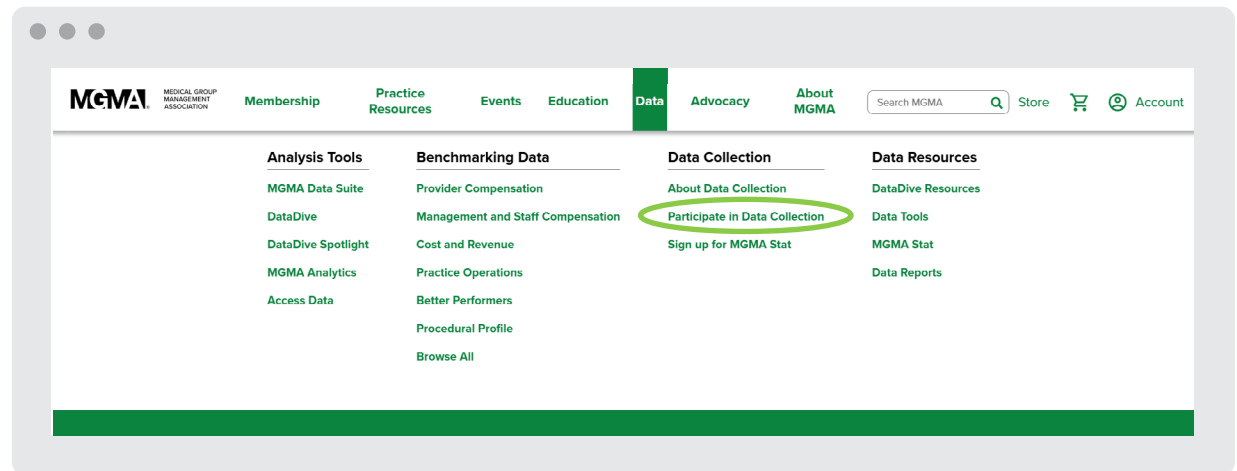
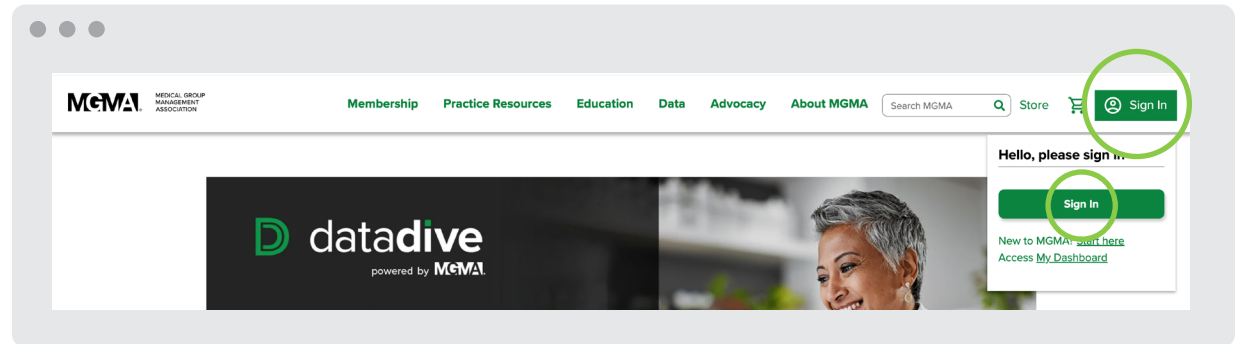
Still have questions? Reach out to our expert team at survey@mgma.com.

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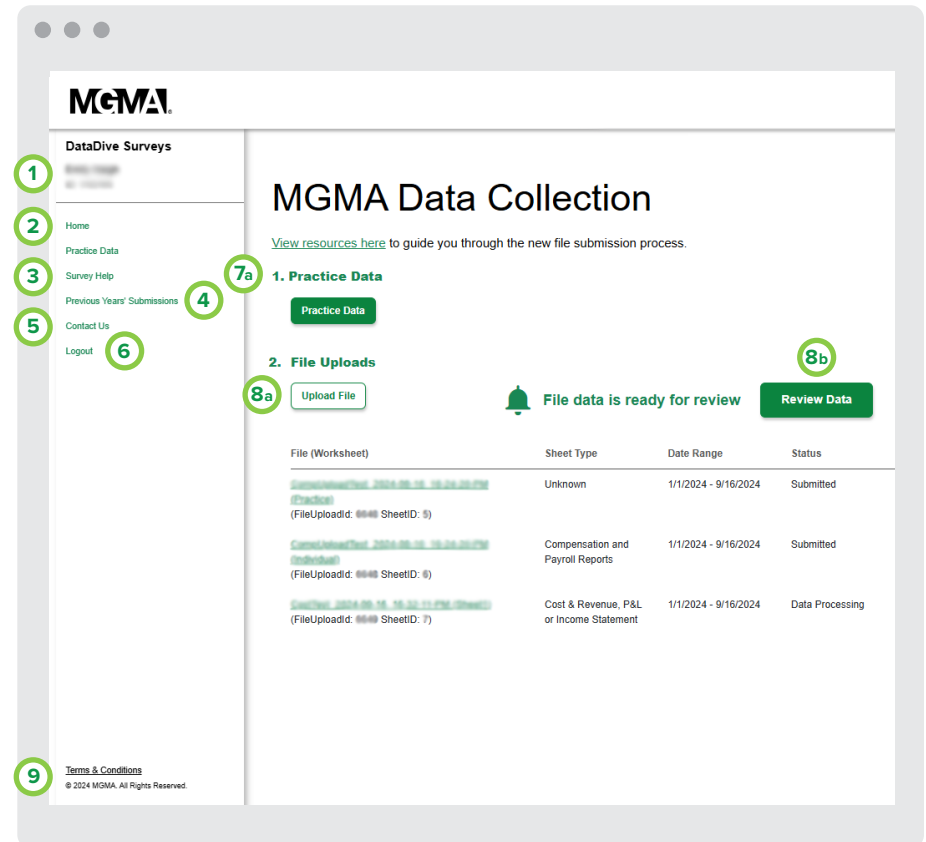
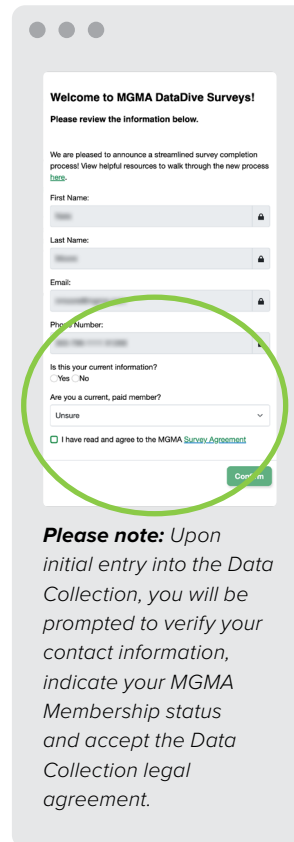
ACCESSING THE DATA COLLECTION PLATFORM

1. Visit mgma.com
2. Sign in with your existing MGMA account credentials by clicking **“SIGN IN”** in the navigation bar.
3. Access Data Collection in one of two ways:
 - a. After signing in, click on the **“DATA”** tab in the navigation bar and select **“PARTICIPATE IN DATA COLLECTION”**
 - b. Type **“survey.mgma.com”** in the URL search bar (bookmarking this page is recommended).
4. Upon initial entry, you will be prompted to confirm your contact information and accept an updated data license agreement.



GETTING AROUND: A VISUAL GUIDE

- 1. Your MGMA ID:** This is the MGMA ID associated with the account. If you submit questions for assistance, please include your MGMA ID with your inquiry.
- 2. Home:** Use the left navigation to return to this home page.
- 3. Data Collection Help:** View helpful resources to guide you through Data Collection completion, including templates and definitions.
- 4. All Years' Submissions:** Access Data Collection submitted in previous years. Please note that Data Collection submitted by someone else within your organization may not be displayed.
- 5. Contact Us:** If your questions can't be answered with resources in the Data Collection Help menu, you can find our contact information here to receive one-on-one support.
- 6. Logout:** Once finished with the submission, or if you need to step away, log out of the Data Collection platform here. Please note that the platform will automatically log out after 20-minutes of inactivity.



7. View All Practice Data:

- If you have participated in the past, the practice demographic information may already be pre-filled. Click Practice Data to download, review, and make any necessary updates.
- If you have not participated in the past, please complete the practice demographic information before uploading files for Data Collection completion.

8. Actions:

- Click the Upload File button next to the file type intended to be uploaded. The specified file type as well as the status associated with each is displayed.
 - By clicking the Review Data button, the files that have already been uploaded can be reviewed.
- 9. Terms and Conditions:** The full Data Collection agreement can be viewed here.

COMPLETE/ REVIEW YOUR PRACTICE DATA

Click through each tab of the Practice Data section (Practice Demogs, Practice Structure, Hours of Operation, Practice Systems) to complete and/or review each section. If these details are not already pre-filled, completing these fields is a one-time investment. This information is saved and will only need to be updated if any of these details change.

- 1. Add Practice:** Click Add Practice to add a new row for inputting additional practice(s).
- 2. Delete Selected:** If a listed practice should be excluded from your data submission, check the box(es) next to the appropriate practice and then click Delete Selected.
- 3. Save:** To save your practice data, click Save.
- 4. Download:** You may view the practice data in Excel format and/or make updates via Excel by using the Download button.
- 5. Upload:** To save any updates made via Excel, click the Upload button and upload your practice data file.

The screenshot shows the MGMA DataDive Surveys interface for managing practice data. The main heading is "Practice Data". Below the heading, there are three buttons: "Add Practice", "Delete Select", and "Save". There are also three numbered callouts (1, 2, 3) pointing to these buttons. Below the buttons, there are four tabs: "Practice Demogs", "Practice Structure", "Hours of Operation", and "Clearinghouse". The "Practice Demogs" tab is selected. Below the tabs is a table with the following columns: Practice Name, Practice NPI, Practice Address, Practice City, Practice State, Practice Zip, Fiscal Month Begin..., and Fiscal Month End. The table contains one row with the following data: Test, 1234567890, 1234 Practice Rd, Denver, Colorado, 12345, January, and December. A green circle highlights the checkbox for the "Test" row. Below the table, there are pagination controls showing "1" of "1" page and "10" items per page. At the bottom right, there are two buttons: "Upload" and "Download". There are also two numbered callouts (4, 5) pointing to these buttons. The footer of the page includes "Terms & Conditions" and "© 2024 MGMA. All Rights Reserved."

DATA FILES AND UPLOADING

Once you have confirmed your Practice Data is up to date, you can go back to Home to upload your files. Upon clicking the Upload File button (see *Step 8 in Getting Around: A Visual Guide*), you will be prompted with the following:

- 1. Select the Timeframe:** Indicate the Start and End dates for which your submission represents.
- 2. Upload your File(s):** Either drag-and-drop, or click **“CHOOSE FROM COMPUTER”** and find your file(s) to upload.
- 3. MGMA Sample Templates:** An example file with required MGMA headers can be downloaded to provide guidance on data for inclusion in your submission.
- 4. Upload:** After you have selected the file(s), click Upload Files. Now you are ready to map and review your files!

The screenshot shows a web browser window titled "Upload Files" with a close button (X) in the top right corner. The window contains the following elements:

- 1:** A progress indicator at the top left of the window.
- 2:** A progress indicator at the top right of the window.
- 3:** A progress indicator at the top right of the window.
- 4:** A progress indicator at the top right of the window.

Please upload your spreadsheet by dragging and dropping the file below or by clicking "Choose from Computer". Uploaded files will be available for review within 5-10 minutes.

Start Date: 01/01/2024 **End Date:** 10/31/2024

Prior to uploading any file, please ensure no personal health information (PHI) or social security numbers (SSN) are included.

This component will only accept .XLSX or .CSV files, up to 12 files at a time. File size limit (600 MB).

*To successfully use 'Choose from Computer' option, select the files from a directory then click the 'Open' button. File(s) will not be attached if you do not do this step.

Drag and drop files here
OR
[Choose from Computer](#)

Having trouble uploading your data?
Try uploading using one of these templates:

- [Download Compensation and Payroll Reports template.](#)
- [Download Cost & Revenue, P&L or Income Statement template.](#)
- [Download CPT and Claims Data template.](#)

Cancel **Upload Files**

COMPLETE YOUR MAPPING CROSSWALK

Once files have been uploaded, you will be prompted to review your file headers to ensure alignment across the MGMA fields. Our system does its best to match your headers, but if any are incorrect, please update as necessary.

- 1. Select a worksheet:** Select a worksheet from your submitted files to complete the mapping crosswalk.
- 2. What Type of File is This:** Indicate the appropriate file type reflected in the worksheet selected.
- 3. Mapping to the MGMA Column Header:** In this section, you will select the MGMA header that corresponds with the header that was provided from your uploaded report.
- 4. Add Practice Name:** If the file you upload does not include your practice name, please select from the dropdown list or type in a new practice name.
- 5a. Select Your Header Row:** In order map your headers, indicate the row your headers start on. After selecting your header row, a dropdown menu will appear.
- 5b. MGMA Header:** This row will appear after you select your header row. Click through each dropdown menu and select the MGMA header that aligns with yours. Headers that are recognized by our system will auto-populated for you and should be reviewed to confirm accuracy.
- 6. Upload Files:** To upload additional files, click Upload Files.
- 7. Save:** To save your progress and complete your mapping crosswalk later, click Save and then exit out using the “X” in the top right hand corner.
- 8. Proceed to Next Step:** To save your progress and move on to the next step, Data Cleanup, click “Proceed to Next Step.”
- 9. Ask MGMA for help:** Need assistance? Press this button to reach out to our Data Solutions team for help.

The screenshot shows the 'Mapping Crosswalk' interface with the following elements and callouts:

- 1:** 'Select a worksheet:' dropdown menu showing 'MGMAPayrollTemplate 7_2024-12-10_20-42-13-PM (Staff)'. A close button 'X' is in the top right.
- 2:** 'What type of file is this? *' section with radio buttons for 'Practice Profile', 'Compensation and Payroll Reports' (selected), 'CPT and Claims Data', 'Cost & Revenue, P&L or Income Statement', and a checkbox for 'This file contains Chart of Accounts (COA)'.
- 3:** 'Instructions' section with a list: 1. Select the row that contains your headers and map them to MGMA headers. 2. Delete all rows and columns that are not part of your data collection. Please check the last page of the data grid for irrelevant data. 3. Submit your data.
- 4:** 'Add Practice Name (GroupName)' section with a dropdown 'Select or type a group name' and an '+ Add Group' button. A 'Show errors only' checkbox is on the right.
- 5a:** 'Your header' row with a 'Select Your Header Row' dropdown set to '1' and a 'Delete Column' button.
- 5b:** 'MGMA header' row with dropdowns for 'Practice Name (GroupName)' and 'Provider or Staff Name (ContextName)', and a 'Delete Column' button.
- 6:** 'Upload Files' button at the bottom left.
- 7:** 'Save' button at the bottom center.
- 8:** 'Proceed to Next Step' button at the bottom right.
- 9:** 'Ask MGMA for help' button at the bottom right.

	Select Your Header Row	Column 1	Column 2	
Your header	1	GroupName	ContextName	Plac
MGMA header		Practice Name (GroupName)	Provider or Staff Name (ContextName)	Emp
		Practice Name	Employee Name/Identifier	Emplo

REVIEW SUBMISSION FORMATTING

The third step of the submission process is to review and update any possible formatting discrepancies.

- 1. Data Filtering:** Within this row you can type within the blank boxes for quick filtering of your data.
- 2. Value:** You will fill in the missing data point in this field or select the appropriate value from the drop-down menu. Please note, each field will also indicate the type value required (ex: decimal, percentage, dollar amount). Make updates to highlighted fields either by updating formatting issues and/or completing missing fields.
- 3. Discrepancies Filter:** To view formatting discrepancies, select the check box Filter by discrepancies only. This will show you the data points that are missing or outside of the expected format.
- 4. View Data Checks:** Once all discrepancies are resolved, you are ready to move onto the last step: Data Checks.

Data Cleanup 1 2 3 4 X

Please review your data formatting and update any discrepancies.

541 Data Discrepancies Found 3 Filter by discrepancies only

1 Group	Provider	File	Metric	Value
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	Years in Specialty	2 Decimal Value
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	Collections for Professional Charges	Dollar Amount
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	Professional Gross Charges	Dollar Amount
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	Does this provider's productivity include any that was not their own?	-- Select an Option --
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	Total Patient Encounters	Decimal Value
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	% Other	Percentage
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	ASA Units	Decimal Value
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	Compensation Included Revenue from Separate Facility Fee	-- Select an Option --
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	% Administrative	Percentage
▲ Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	# of Outpatient E/M Codes	Decimal Value
▲ Test 123	6	MGMMPayrollTemplate-1_2_2024-1... (Providers)	# of Outpatient E/M Codes	Decimal Value
▲ Test 123	9	MGMMPayrollTemplate-1_2_2024-1... (Providers)	# of Outpatient E/M Codes	Decimal Value
▲ Test 123	2	MGMMPayrollTemplate-1_2_2024-1... (Providers)	# of Outpatient E/M Codes	Decimal Value
Test 123	7	MGMMPayrollTemplate-1_2_2024-1... (Providers)	% Administrative	0
Test 123	8	MGMMPayrollTemplate-1_2_2024-1... (Providers)	% Administrative	0
Test 123	3	MGMMPayrollTemplate-1_2_2024-1... (Providers)	% Administrative	0
Test 123	1	MGMMPayrollTemplate-1_2_2024-1... (Providers)	% Administrative	15
Test 123	5	MGMMPayrollTemplate-1_2_2024-1... (Providers)	% Administrative	10

1 of 22 pages (537 items) 4

Cancel View Data Checks

REVIEW YOUR DATA SUBMISSION

The final step of your submission will prompt you to review your data. You may see flags for any of the following:

- **Verify Calculations:** This is data that MGMA calculated on the back end based upon data provided to us in your file(s). Please confirm that the calculated information is correct.
- **Review/Update data flags on provided information:** This data may be flagged due to the data points being out of the anticipated range or specific requirements not being met.
- **Review/Update missing information:** This data was not provided in the file uploads, or we were unable to calculate this datapoint based on your submission.

1. **Select Type of File Data:** Data checks will display by each file. Select a data type for review.
2. **Re-upload Data:** You can upload a file with your data updated in lieu of making individual updates.
3. **Data Checks:** Red highlighted fields indicate data for review either for verifying calculations, making updates and/or adding missing data.
4. **Accept:** Once you have updated or confirmed each data check, click the green accept checkmark.
5. **Submit Data for Review:** Once all data checks have been completed, and you have accepted your changes, you can submit your data to your analyst for review.
6. **Notes/Comments:** If you would like to provide your analyst with notes or comments regarding your submission, you may include those details here.
7. **Accept All:** Once you have reviewed all data checks, you can accept all changes at once by clicking this button. This process will need to be complete for each worksheet/files.

Data Review ① ② ③ ④

Please review your submission formatting for the following errors found and update any discrepancies. You may also accept all changes using the button below, or review each column individually.

① Select Type of File Data
Compensation and Payroll Reports

② Re-upload Data

③ ▲ 1 Data Checks ④ Accept

The billable clinical percent is missing for at least one of your providers. This is required for a provider to be eligible for submission.

Provider	% Billable Clinical	Employment Status	Specialty or Position Title
Group: Test123			
▲ Employee 13	Percentage	Actively employed	Gastroenterology

④ ▲ 1 Data Checks ④ Accepted

Billable clinical activity, administrative, teaching, research and other percent must sum to 100, but do not for at least one of your providers. If you reported decimals, please update and use whole numbers. Please verify your answers are correct.

Provider	% Billable Clinical	% Other	% Administrative	% Teaching	% Research	Employment Status	Specialty or Position Title
Group: Test123							
▲ Employee 13	Percenta...	Percen...	Percentage	Percentage	Percentage	Actively e...	Gastro...

View All 6 Records

⑥ Notes/Comments

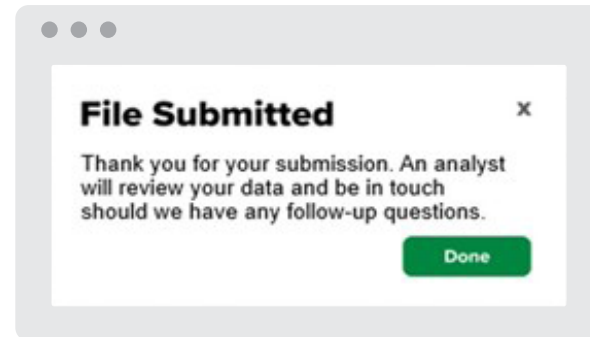
Please input your comment here

⑦ Accept All

⑤ Back Cancel Submit Data for Review

DATA COLLECTION COMPLETION!

After reviewing your submission, a pop-up will appear confirming the file was submitted to the Data Collection team.



SUPPORT

Data Collection participation is as simple as that!
We understand you might still have questions, though.

CONTACT

Data experts are available Monday through Friday, 8:00 a.m. to 5:00 p.m. MT.

Call **877.275.6462**, ext. **1895**, email survey@mgma.com or set up a 1:1 with a data analyst [here](#).

Visit mgma.com/datacollection for additional helpful resources and information.

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