



SURVEY PARTICIPATION

USER GUIDE | 2024



NEW DATADIVE SURVEY AUTOMATION

MGMA survey participation is now automated! In previous years, reports were pulled and formatted to fit templates, then the Analyst team followed up for discrepancies or missing data. With this new, automated process there will be no more time-consuming templates, or badgering from MGMA. With the one-time investment of mapping the files, submissions will now be a drag and drop process moving forward. Here's how to get started:

- Export your reports from your system to Excel sheet(s)
- Insert a row above your report headers and map them to our list of required headers
- Drag-and-drop or upload your files into the new survey platform

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

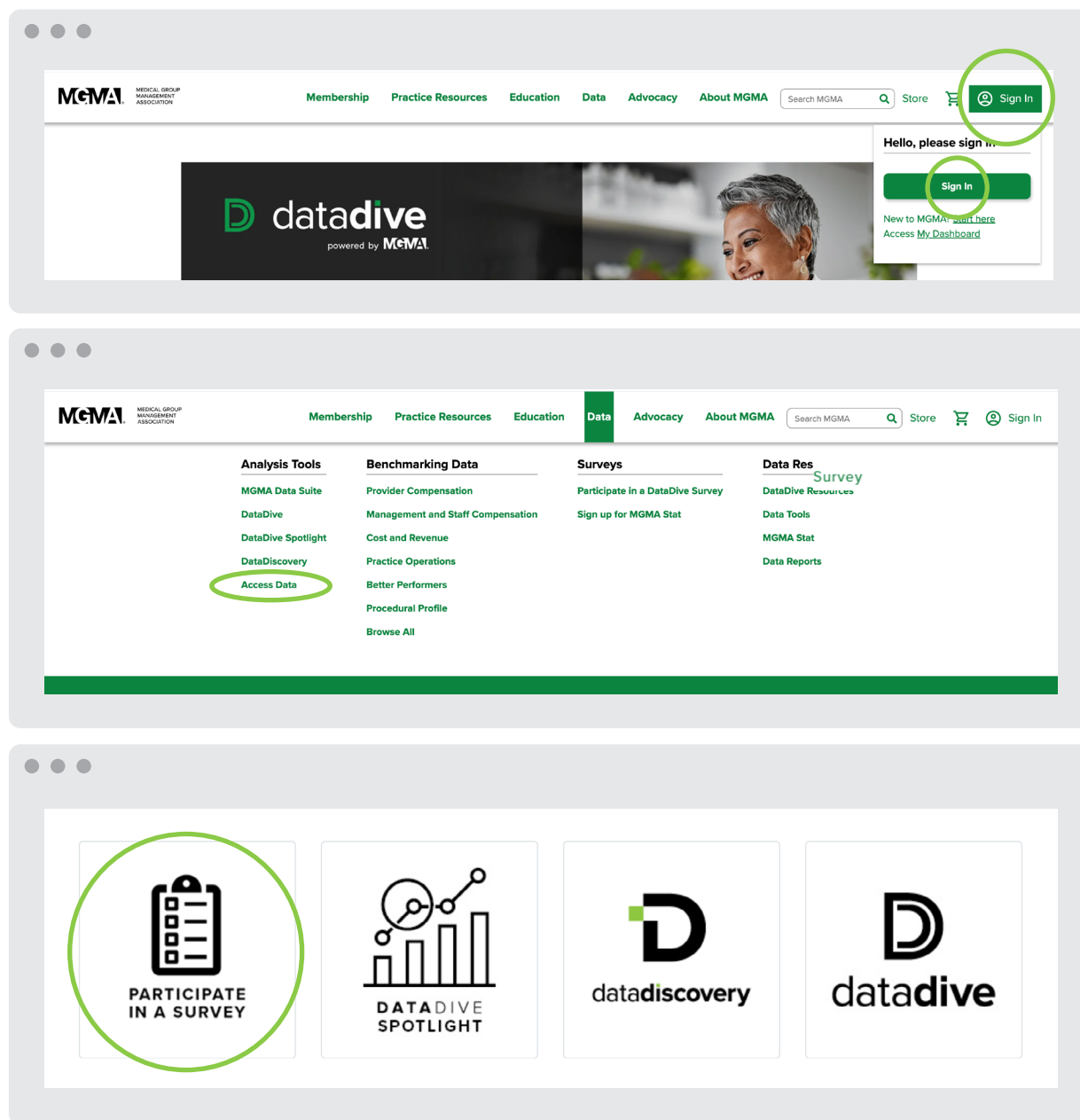
Still have questions? Reach out to our expert team at survey@mgma.com.

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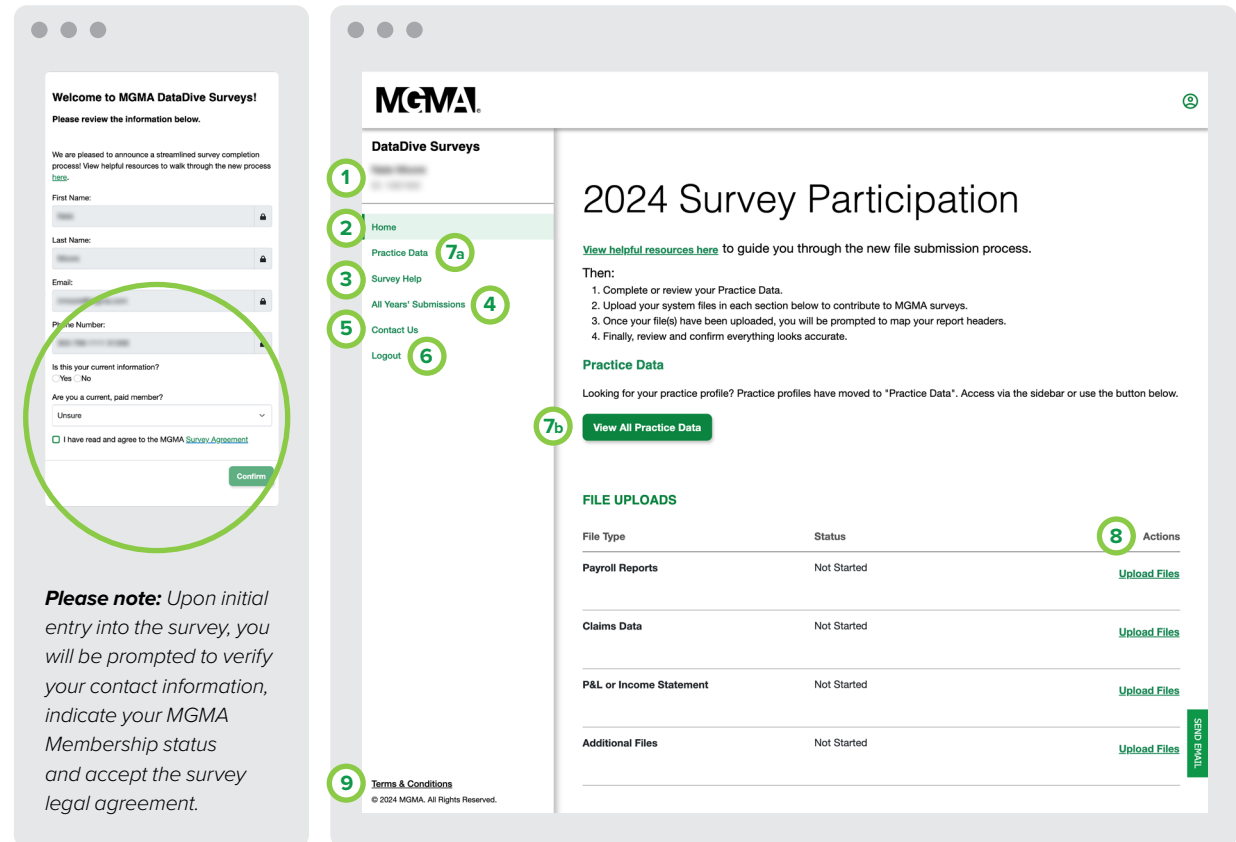
ACCESSING MGMA DATADIVE SURVEYS

1. Visit mgma.com
2. Sign in with your existing MGMA account credentials by clicking **"SIGN IN"** in the navigation bar.
3. Access the surveys in one of two ways:
 - a. After signing in, click on the **"DATA"** tab in the navigation bar and select **"ACCEESS DATA"** under the Analysis Tool menu header.
 - b. Type ["data.mgma.com"](https://data.mgma.com) in the URL search bar (bookmarking this page is recommended).
4. You may be asked to accept an updated data license agreement.
5. On the next page, select **"PARTICIPATE IN A SURVEY."**



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. **Survey Help:** View helpful resources to guide you through survey completion, including file header lists and definitions.
4. **All Years' Submissions:** Access surveys submitted in previous years. Please note that surveys 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 Survey 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 survey platform here. Please note that the platform will automatically log out after 20-minutes of inactivity.



7. View All Practice Data:

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

8. Actions:

- a. 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.
- b. By clicking the View Files button, the files that have already been uploaded can be reviewed.
9. **Terms and Conditions:** The full survey agreement can be viewed here.

COMPLETE/ REVIEW YOUR PRACTICE DATA

Click through each tab of the Practice Data section (Practice Demos, 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.

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

Upload - Payroll Reports

Please upload your Payroll Reports spreadsheet by dragging and dropping the file below or by clicking "Choose from Computer". Once you have uploaded the file it will be available for review within 5-10 minutes. You may wait for it to process or return later to finish.

1 A sample file with required MGMA headers can be downloaded [here](#).

If you submitted a survey last year, you may [download](#), make updates and reupload.

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

Select the timeframe for which your data submission represents:

2 Start Date: 01/01/2023 End Date: 12/31/2023

This component will only accept .XLSX or .CSV files, up to 12 files at a time. File size limit (100 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
3 [Choose from Computer](#)

My file headers are on row: 1

☐ I verify that the above is correct, that my file(s) do not contain any personal health information (PHI) and my submission is final to the best of my knowledge.

No File selected for upload.

4 [Close](#) [Upload](#)

MAPPING YOUR REPORT TO MGMA HEADERS

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

- 1. Previously Saved Mapping:** You can utilize this button to show the headers that have been previously mapped and make updates as needed.
- 2. Download Previously Mapped Column Headers:** By clicking on this button, an Excel file will download to show you your file headers and the corresponding MGMA headers that have already been mapped.
- 3. Participant File Name:** This is the file name that was uploaded for your submission.
- 4. Participant File Column Header:** The column headers that were provided within the uploaded report.

Review Column Headers

Use the dropdowns to map your file headers to the appropriate MGMA field. This is a one-time process, and as long as your file headers remain the same, you will not have to complete this step in future participation.

[Click here to show all previously saved mappings.](#)

[Download any previously mapped column headers here.](#)

File Name:	Column Header:	Maps To:
2023 Data Report	Employee Name	Provider or Staff Name
2023 Data Report	Practice Name	Practice Name
2023 Data Report	Hourly Wage	--Not Yet Mapped--
2023 Data Report	Date of Hire	--Not Yet Mapped--

[Save & Close](#) [Next](#)

- 5. 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.
- 6. Drop-Down:** By clicking on the drop-down arrow, a list will appear with column headers to select from.
- 7. Not Mapped Yet:** For any headers that have not been mapped, the dropdown will be labeled as “--Not Yet Mapped--” this indicates that you will need to click on the dropdown and select the corresponding MGMA header.
- 8. Save & Close:** To save your progress and complete mapping later, click on Save & Close.
- 9. Next:** Once you have completed mapping, press Next to proceed with Review Data.

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.

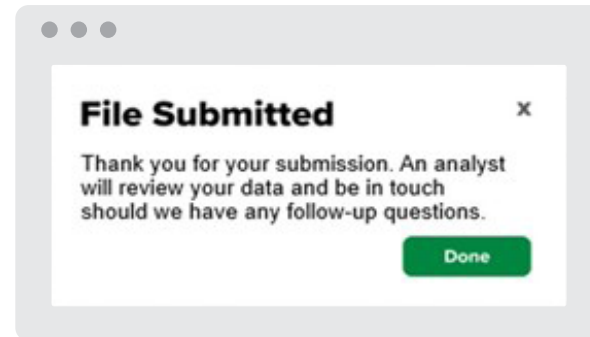
1. **MGMA Sample Templates:** Expand Arro: To expand section you are reviewing, click on the arrow on the left-hand side.
2. **Confirm the Data Point(s):** To confirm a datapoint is correct, click the green check mark. If a datapoint is incorrect, you can make the correction directly in the provided box or column, and then click green check mark.
3. **Reject the Data Point(s):** If the datapoint cannot be confirmed, click on the red X to reject the data point(s).*
4. **The (i) icon:** By clicking on the (i) icon, a definition will appear.
5. **Accept All:** You can accept all data checks at once by clicking the Accept All button.*
6. **Ignore All:** You can ignore all data checks at once by clicking on the Ignore All button.*
7. **Re-upload Data:** If there are too many data checks to review individually, you can update and/or re-upload file(s) using the Re-upload Data button.
8. **Notes/Comments:** If you would like to provide your analyst with notes or comments regarding your submission, you may include those details here.

9. **Save & Quit:** If you do not have enough time to complete your data review, you can save your progress by clicking on the Save & Quit button.
10. **Submit:** Once all the data review has been completed, click the Submit button to complete the submission.

***PLEASE NOTE:** If there is missing data, an analyst may be in contact with you to gather any additional required information.

SURVEY COMPLETION!

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



SUPPORT

Survey 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 send us a chat
from within the survey platform

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