

Volume

1

CREATIVE DATA TECHNOLOGIES, INC.

DATAVAULT™ DWC Medical Data Module

DataVault User's Manual

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Chapter 1 – Introduction

1.1 DataVault™ Medical Data Submission to DWC

The DataVault™ Website is a subscription-based service that is geared toward helping companies accomplish their regulatory reporting to various State and Federal entities. You are reading the User's Manual for the Module of the DataVault™ System that allows Insurance Companies or Third Party Administrators to submit their Medical Forms to the Florida Division of Workers' Compensation (DWC), per Florida Statutes 440.13 & 440.185.

The DWC operates an automated system called the Medical Data System (MDS) that automatically receives properly formatted data files and processes them. Upon processing each form submitted, the MDS will either accept or reject the submitted form. If it is rejected, the MDS will return a list of the validation errors that it found for each form, and the Insurance Company or Third Party Administrator is responsible for correcting the rejected forms and resubmitting the forms to the MDS for acceptance. A form is not considered properly filed until it has been processed and accepted by the MDS. There are late filing penalties assessed for forms that are not properly filed (reported) to DWC.

The DWC mandates electronic submission of the following 4 different medical forms:

- DWC-09 – Doctor's Office Bills
- DWC-10 – Pharmacy (Drugs & Supplies) Bills
- DWC-11 – Dental Bills
- DWC-90 – Hospital and Ambulatory Surgery Center Bills

1.2 How the DataVault works

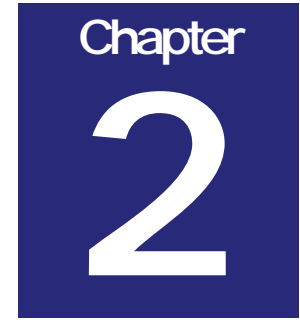
The Users can either input the medical forms manually into the DataVault™ Website, or they can import the forms from their bill payment system into the DataVault™. Once the forms are entered or imported into the DataVault™ system, they must be submitted to DWC for processing. Once you mark one or more form(s) as "SUBMITTED", there is an automated job that runs behind the scenes once at the top of every hour to gather up all the Submitted forms and transmit them to DWC. Once a form has been transmitted to DWC for processing, the status of the form(s) are changed to "TRANSMITTED". The DWC Medical Data System is very fast at processing the files and providing the results back to us. We have another job that runs every 10 minutes looking for processing results that need to be downloaded from the MDS. As soon as these results are downloaded and incorporated into the DataVault™ System, each form is marked as "PROCESSED". Each form is marked as either ACCEPTED or REJECTED. There is an easy to use search facility within the

DataVault™ website that allows you to focus (filter) on the REJECTED forms, and when you pull up a rejected form, it highlights each failing field with a red background, and if you hover your mouse over the red (failing) field, it displays a long error message that states exactly what the problem is. Using this information, it is very easy to correct the form and simply resubmit it for reconsideration by the MDS.

As you can see from the workflow described above, rather than trying to duplicate all of the hundreds of validation edits per form on our system, it simply sends the forms to DWC for a quick turnaround and displays the actual errors returned by the MDS on our website. This way, there are no issues with our validation rules getting out of sync with the MDS. Forms are submitted frequently (once per hour), so there is very little delay in getting the processing results for all your forms.

All you have to do is the following simple steps:

1. Enter or import your forms into the DataVault™ Website.
2. Submit your forms to DWC when you are ready.
3. Once they have been PROCESSED, review the forms for any REJECTED forms.
4. Correct the rejected forms and resubmit them to DWC.
5. Go to step 3 until all forms have been ACCEPTED by DWC.



Chapter 2 - DataVault Website Overview

2.1 Screen & Menu Organization

This chapter's purpose is to introduce you to the various menus in the DataVault™ website and what each one of the navigation buttons are used for. Starting in Chapter 3, you will be given a more detailed walk-thru of the usage of all the screens of the website.

From a very high level, all of the following functionality is available in the DataVault™ System:

- Enter Forms by hand (all 4 Form Types)
- Import Forms
- Export Forms
- Search for Forms
- Edit Forms (all 4 Form Types)
- Submit Forms to DWC
- Review Errors returned by DWC, and resubmit forms to DWC
- Review History of User Actions taken on the System
- Quick access to Forms recently worked on
- Run Reports
- View List of Authorized Insurance Companies & TPA's
- Backup your Medical Forms Data (not the same as Export)
- Restore your Medical Forms Data (not the same as Import)

2.2 Login Window

This system is secured by 128-bit SSL Encryption

Authentic Comodo Site Seal
point to verify™

Creative Data Technologies, Inc.

DataVault (tm)

UserID

Password

For technical support or account password issues, please call (850) 264-9065

Your UserID & Password will be provided to you at the time your account is activated. Notice the phone number posted at the bottom for technical support if you ever have trouble getting logged in.

2.3 Top Toolbar

Good Afternoon, Steven.

DATAVAULT (tm)

TEST

At the top of the website on every screen (except the login screen), you will see the Toolbar above displayed. It offers the following buttons:

Main Menu:

Always returns you to the main DWC Medical Data Submission Menu

Customer Profile:

For administrative use only.

Activity Log:

Displays the Activity Log (a history of what you have been doing on the system).

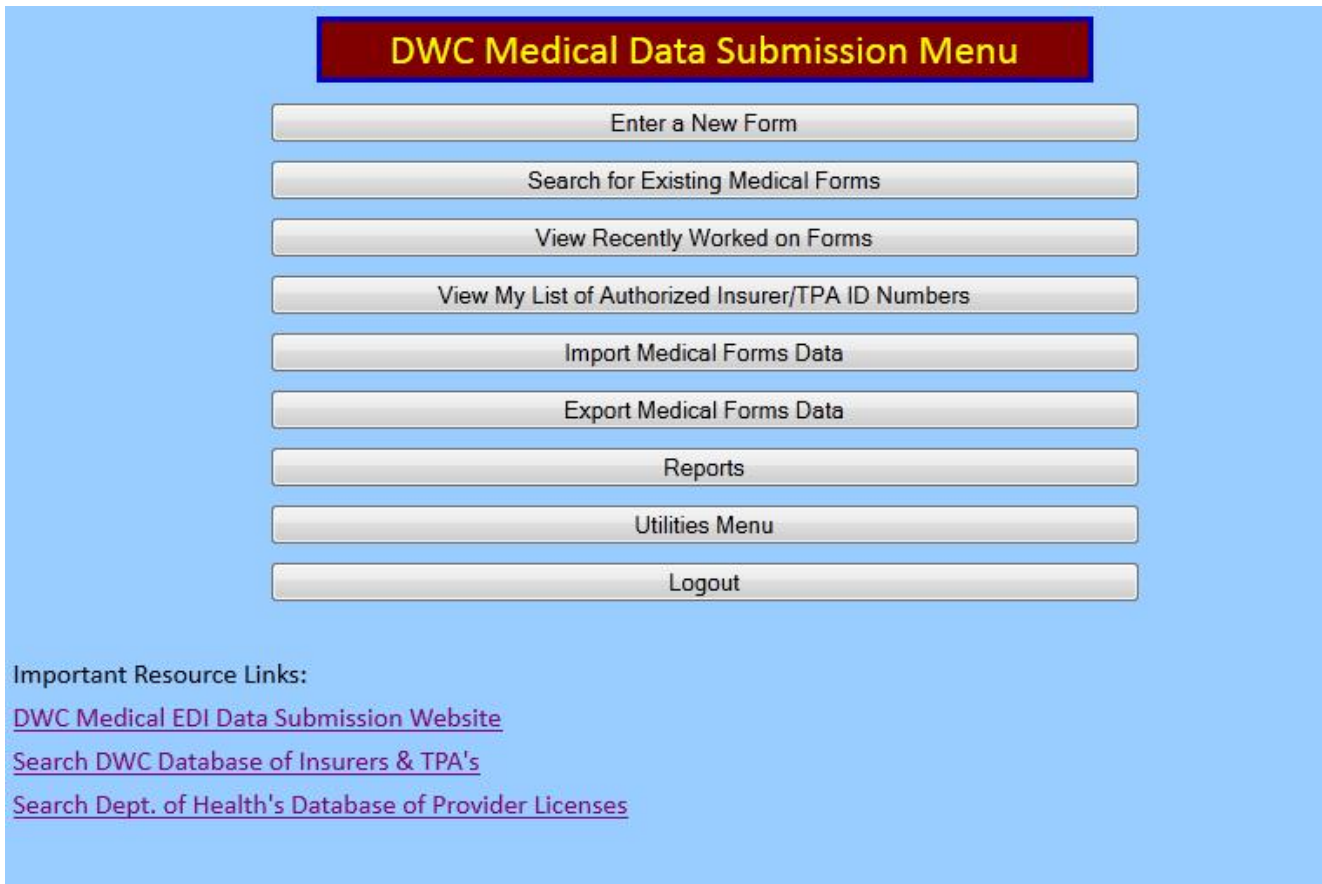
Billing & Payments:

For administrative use only.

Logout:

Fast way to log out of the system regardless of what screen you are currently on.

2.4 DWC Medical Data Submission Menu



This is the main menu that you will work from when using the DWC Medical Data Submission Module of the DataVault™ Website. The following functions (buttons) are available on this screen:

Enter a New Form:

Allows you to manually input a new form into the system.

Search for Existing Medical Forms:

Displays a search window so you can locate forms based on flexible search criteria.

View Recently Worked on Forms:

Displays a list of the forms that you have most recently worked on.

View My List of Authorized Insurer/TPA ID Numbers:

Displays a list of all of the Insurer/TPA Companies that you are currently authorized to submit for.

Import Medical Forms:

Displays the Import Window that allows you to import medical forms into the system.

Export Medical Forms:

Displays the Export Window that allows you to export your forms' data for offline analysis in Microsoft Excel.

Reports:

Displays a menu of available reports that you can run.

Utilities Menu:

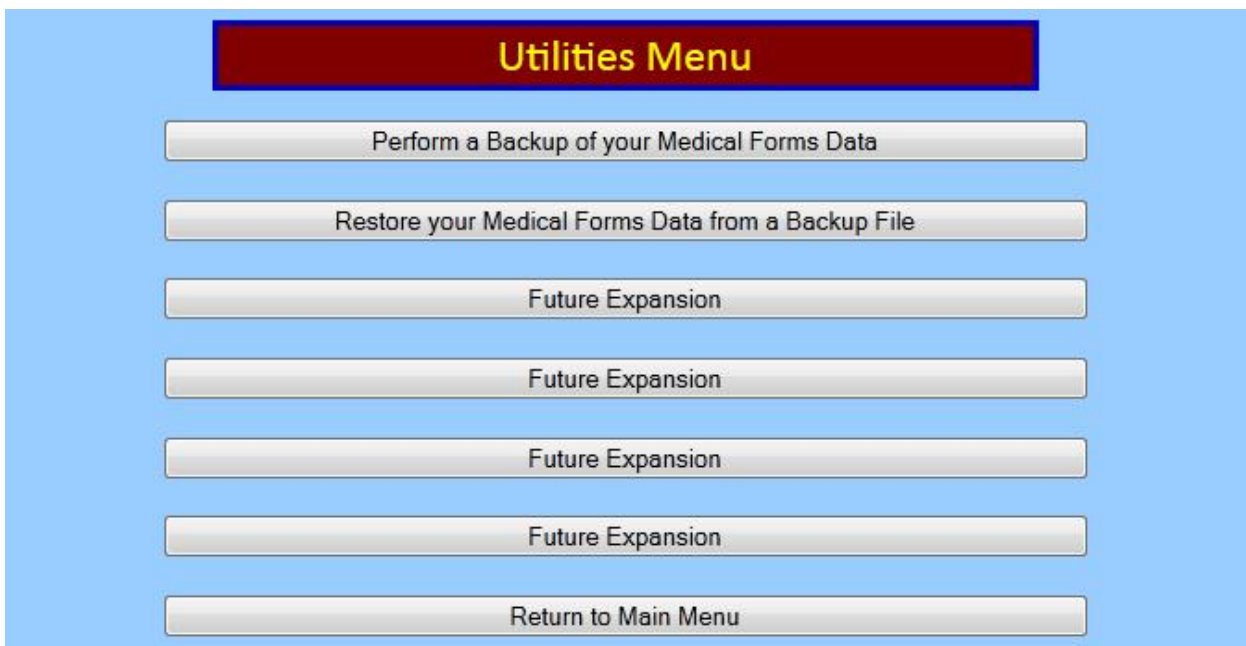
Displays a menu of utility functions of the system (see below for further info on this screen).

Logout:

Logs out of the system.

Notice also on this screen that there are some hyperlinks at the bottom to Important Resources for DWC Medical Data Reporting.

2.5 Utilities Menu



This screen displays a list of utilities that are not needed very often, so they were kept off the main menu on purpose. The features (buttons) on this screen are as follows:

Perform a Backup of your Medical Forms Data:

Use this button to make regular backups of your medical forms data for disaster recovery purposes.

Restore your Medical Forms Data from a Backup File:

Use this button to restore accidentally deleted or destroyed forms from a backup file that you previously created using the backup button above.



Chapter 3 - Detailed Usage Guide

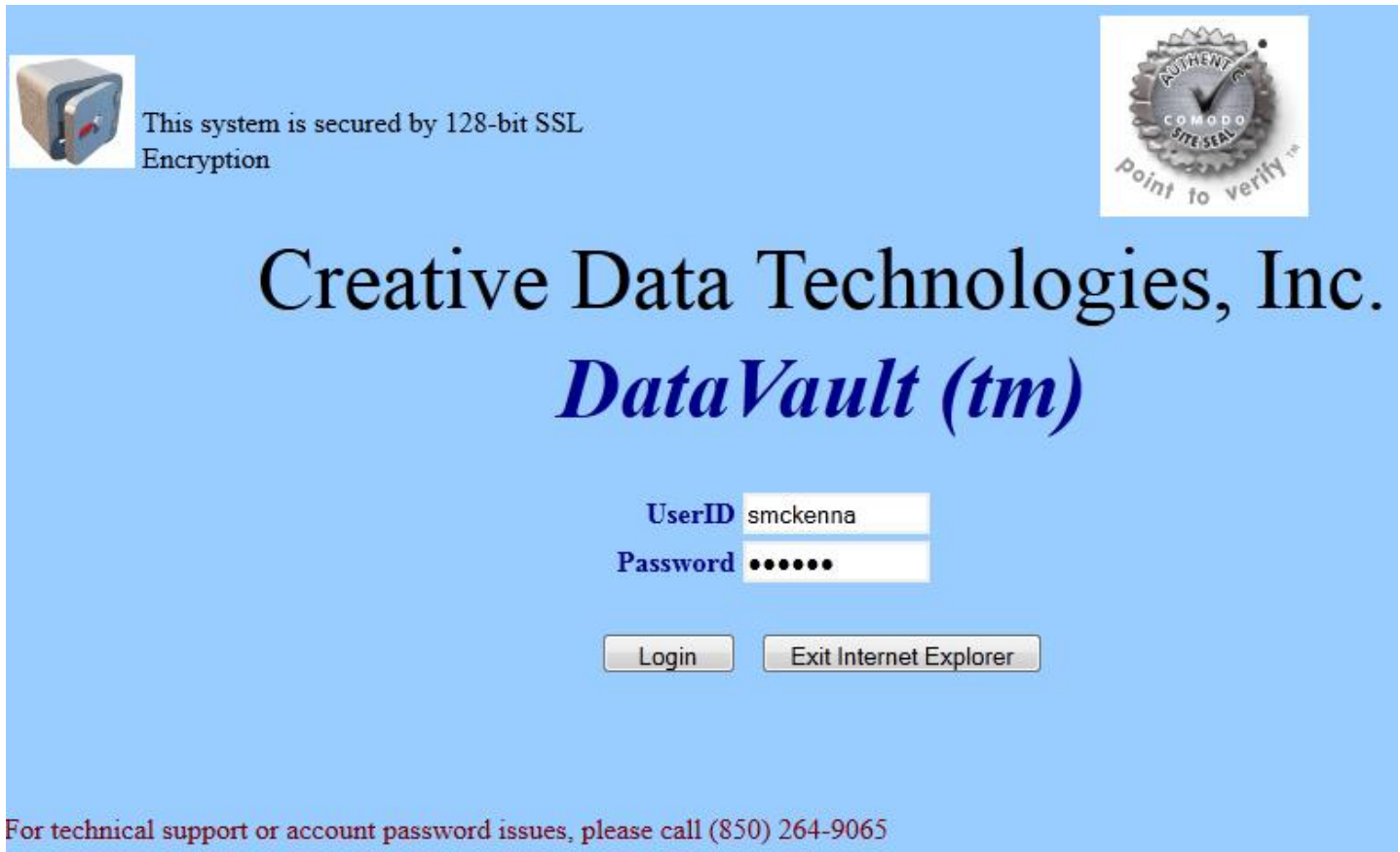
3.1 Logging into the DataVault™ Website

Navigate to the following URL to get logged into the Production System:

<https://www.creativedatatech.com/datavault>

If you are conducting testing, you can use the following Test System:

<https://www.creativedatatech.com/datavaulttest>



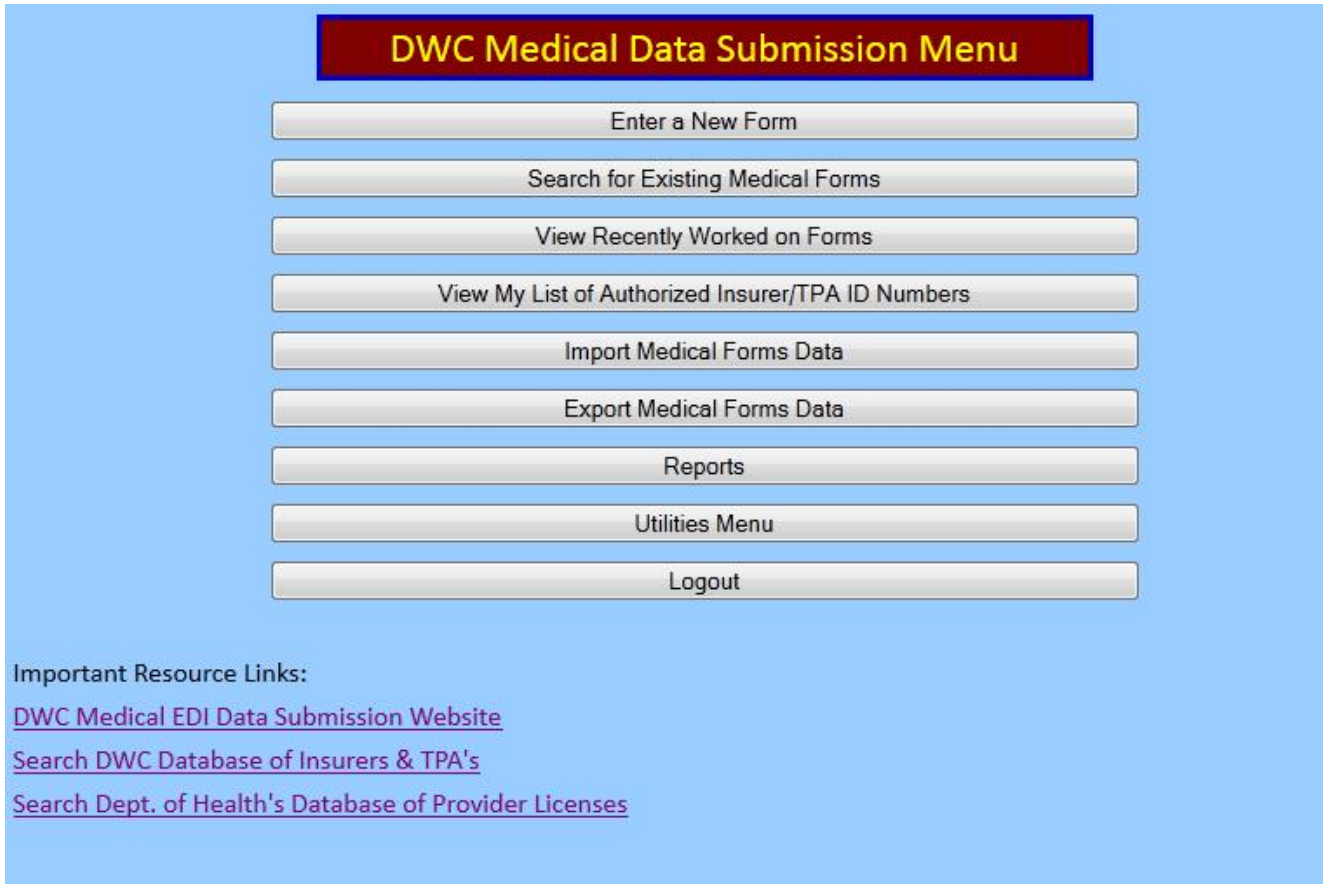
The screenshot shows a light blue login page for Creative Data Technologies, Inc. DataVault (tm). In the top left, there is an icon of a vault and the text "This system is secured by 128-bit SSL Encryption". In the top right, there is a circular seal with the text "AUTHENTIC COMODO SITESEAL point to verify". The main heading reads "Creative Data Technologies, Inc. DataVault (tm)". Below this, there are two input fields: "UserID" with the value "smckenna" and "Password" with seven dots. At the bottom, there are two buttons: "Login" and "Exit Internet Explorer". A footer line at the bottom of the page reads "For technical support or account password issues, please call (850) 264-9065".

Unless you specifically request access to the Test System, you will only be given User Accounts in the Production System. Usually, access to the Test System is not needed unless you are

developing an automated Import process and need to test the import process out without impacting your Production data.

3.2 The Main Menu

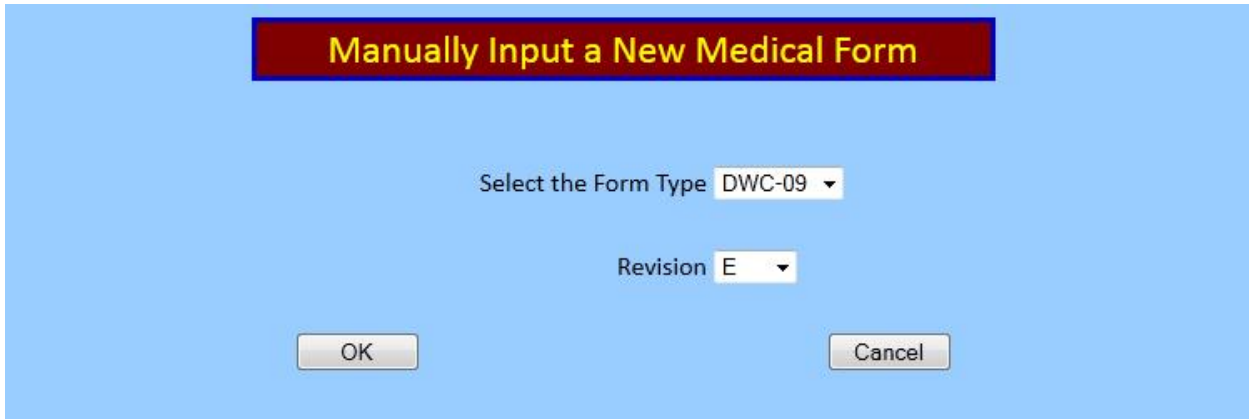
Once you get logged in, you should see the following Main Menu:



The available features (menu items) on this page have already been covered in Chapter 2. In the next section below, we will cover how to manually input a new form into the system.

3.3 Entering a new Form into the System

There are two ways of getting forms into the DataVault™ System. The first way is to manually enter the forms using the website. The other way is to Import the forms using exported data from your Claim Payment System. We will be covering the Import process in detail later on in this document. In order to manually input a new Form using the website, click on the Main Menu button “Enter a New Form”. You will be taken to the following screen:



The screenshot shows a dialog box with a light blue background. At the top, there is a dark red banner with the text "Manually Input a New Medical Form" in yellow. Below the banner, the text "Select the Form Type" is followed by a dropdown menu showing "DWC-09". Below that, the text "Revision" is followed by a dropdown menu showing "E". At the bottom of the dialog, there are two buttons: "OK" on the left and "Cancel" on the right.

Next, you will need to select the Form Type that you want to enter (DWC-09, DWC-10, DWC-11, or DWC-90). Leave the Revision drop-down as the default choice (Revision E as of this writing). As DWC comes up with new Revisions to the Forms, we will be programming the new Revisions into our system. We will always program this window to automatically select the “current” Revision that is required by DWC, so you don’t have to worry about this drop-down box. For the purposes of this manual, let’s cover the DWC-09 Doctor’s Office Billing Form first.

3.4 DWC-09 Form Edit Window

When you choose to either create a new DWC-09 Form, or when you view or edit an existing DWC-09 Form, you will see the following window that is used to view or enter the DWC-09 Form information:

Customer ID: 10092
Creative Data Technologies, Inc.

DWC-09 Edit Window (Revision E)

Form Key: 82
Control #: (not yet generated)

FORM PROCESSING INFORMATION (Fields not on the Paper Form):

Insurer ID Zip Code (no dashes) FEIN (no dashes)

TPA ID Zip Code (no dashes) FEIN (no dashes)

Claim ID # Office Location Code (put any custom information in this field that you want; it is not validated)

Payment Type ([See MEIG Appendix D for Valid Codes](#)) PrePayment Code (P=Prepayment, E=Injured Employee Reimbursement)

Duplicate Override Flag (Enter Y in this field if it was rejected for being a duplicate form, but you have verified that it is NOT a duplicate)

DWC-09 HCFA-1500 HEALTH INSURANCE CLAIM FORM (Fields on the Paper Form):

1a. Insured's ID Number (SSN)

2. Patient's First Name M.I. Last 3. Patient's Birth Date 3a. Sex

14. Date of Current Illness or Injury Date Received Date Paid (enter all dates as YYYYMMDD)

21. Diagnosis or Nature of Illness/Injury:

1. 3.

2. 4.

25. Federal Tax ID Number (Provider) (no dashes) 29. Total Amount Paid (Decimal implied at 2 places, do not input decimal)

32. Service Facility Location (Zip Code) (no dashes) 33b. Billing Provider License #

LINE ITEMS: NOTE: Enter all dates as YYYYMMDD

Seq	From Date	To Date	Place	Billed CPT	Mod1	Mod2	Mod3	Mod4	Diag Ptr.	Amt. Charges	Qty. Units	Amt. Paid	Paid CPT	Mod1
001	20100210	20100210	11	90154	M1				1	00000040000	001	00000040000	90154	M1
002	20100211	20100211	12	54234	M2				2	00000005500	001	00000005500	54234	R1
003	20100211	20100211	11	90334					2	00000004500	001	00000004500	90334	

[Place of Service Codes Legend](#) [EOBR Code Legend \(See MEIG Appendix E\)](#)

ERRORS RETURNED BY DWC:

FORM STATUS AND PROCESSING INFO:

Form Input or Imported by on

Last Modified or Processed by on

DataVault Status

Current DWC Status [When should I change this?](#) Last DWC Processing Result on

Bypass Reason (if Bypassed)

Select the Next DWC Transaction for this Form

Notice that the form is divided into sections, with each section having an underlined heading. Here is an explanation of each section:

FORM PROCESSING INFORMATION (Fields not on the Paper Form):

Insurer ID	<input type="text" value="00143"/>	<input type="button" value="Lookup"/>	<input type="text" value="LIBERTY MUTUAL INSURANCE CO"/>	Zip Code	<input type="text" value="32309"/>	(no dashes)	FEIN	<input type="text" value="591234567"/>	
TPA ID	<input type="text" value="06092"/>	<input type="button" value="Lookup"/>	<input type="text" value="FUND SERVICE CORPORATION"/>	Zip Code	<input type="text" value="33928"/>	(no dashes)	FEIN	<input type="text" value="651234343"/>	
Claim ID #	<input type="text" value="92949-123"/>	<input type="button" value="Generate Unique ID"/>	Office Location Code	<input type="text"/>					(put any custom information in this field that you want; it is not validated)
Payment Type	<input type="text" value="R2"/>	(See MEIG Appendix D for Valid Codes)		PrePayment Code	<input type="text"/>				(P=Prepayment, E=Injured Employee Reimbursement)
Duplicate Override Flag	<input type="text"/>								(Enter Y in this field if it was rejected for being a duplicate form, but you have verified that it is NOT a duplicate)

The section above contains fields that are not present on the paper form. This information has to be obtained elsewhere for reporting purposes. Notice that the Zip Code and FEIN fields should not be entered with the dash number included. The Insurer ID and TPA ID are the 5-digit ID numbers assigned by DWC for the Insurance Company and the Third Party Administrator (TPA) Company. If no TPA Company is involved with the processing of the claim, then leave it blank.

To double-check that you have entered the correct Insurer and/or TPA ID Numbers, you can use the "Lookup" button, and it will display the company name to the right.

The Claim ID # field is very important. In order for the DataVault System to function correctly, you must enter a unique Claim ID number for each claim. The system will display an error and not let you save the form if you enter a duplicate Claim ID number. If you are strictly paper-based, and do not have a Claim Management System containing your own Claim ID Numbers, then you can just use the button "Generate Unique ID", and it will automatically generate a unique Claim ID Number for you.

Notice that there are blue hyperlinks throughout the screen, such as the one next to the "Payment Type" field that reads "(see MEIG Appendix D for Valid Codes)". If you click on it, you will be taken to a document that contains the information to help you enter a valid code. You may have to scroll down in the document to get to the correct Appendix cited.

DWC-09 HCFA-1500 HEALTH INSURANCE CLAIM FORM (Fields on the Paper Form):

1a. Insured's ID Number (SSN)

2. Patient's First Name M.I. Last 3. Patient's Birth Date 3a. Sex

14. Date of Current Illness or Injury Date Received Date Paid (enter all dates as YYYYMMDD)

21. Diagnosis or Nature of Illness/Injury:

1.	<input type="text" value="841.23"/>	3.	<input type="text"/>
2.	<input type="text" value="822.79"/>	4.	<input type="text"/>

25. Federal Tax ID Number (Provider) (no dashes) 29. Total Amount Paid (Decimal implied at 2 places, do not input decimal)

32. Service Facility Location (Zip Code) (no dashes) 33b. Billing Provider License #

The section above contains fields that can be found on the paper DWC-09 billing form. Each field's label has a field ID number that you can use to locate the field on the paper form. The layout of the fields roughly correlates to the position and order in which the fields appear on the paper form in order to make data entry as efficient as possible.

Note that all the date fields must be input as YYYYMMDD. In addition, there is a calendar button next to each date field. If you click on the calendar button, it will display a drop-down calendar that you can use to interactively pick the date.

Notice the newspaper style column order of the 4 Diagnosis Codes with diagnosis code number 2 below number 1. This is to match the order in which they are presented on the paper form.

For all money fields on the form (Total Amount Paid, and line item charges and paid amounts), you need to enter the amount without entering the decimal / period). In other words, in order to input \$514.33 you need to enter it as "51433". This is the way that DWC wants it to be reported. The system will automatically add the leading zeros for you, so you don't have to count zeros.

LINE ITEMS: NOTE: Enter all dates as YYYYMMDD

Seq	From Date	To Date	Place	Billed CPT	Mod1	Mod2	Mod3	Mod4	Diag Ptr.	Amt. Charges	Qty. Units	Amt. Paid	Paid CPT
001	20100210	20100210	11	90154	M1				1	00000040000	001	00000040000	90154
002	20100211	20100211	12	54234	M2				2	00000005500	001	00000005500	54234
003	20100211	20100211	11	90334					2	00000004500	001	00000004500	90334

[Place of Service Codes Legend](#)
[EOBR Code Legend \(See MEIG Appendix E\)](#)

The Line Items section (shown above) will initially be displayed in read-only mode. Read-only mode means that you cannot edit / modify the fields. If you want to edit or add line items, simply click on the "Edit Line Items" button, and the screen will change as follows to allow editing:

LINE ITEMS: NOTE: Enter all dates as YYYYMMDD

Seq	Delete	From Date	To Date	Place	Billed CPT	Mod1	Mod2	Mod3	Mod4	Diag Ptr.	Amt. Charges	Qty. Units	Amt. Paid	Paid CPT
001	Delete	20100210	20100210	11	90154	M1				1	00000040000	001	00000040000	90154
002	Delete	20100211	20100211	12	54234	M2				2	00000005500	001	00000005500	54234
003	Delete	20100211	20100211	11	90334					2	00000004500	001	00000004500	90334

[Place of Service Codes Legend](#)
[EOBR Code Legend \(See MEIG Appendix E\)](#)

As you can see above, after you enter the edit mode, you can modify the line items just like entering data on an Excel Spreadsheet. If you want to add more rows, just click on the "Add More Rows" button:

LINE ITEMS: NOTE: Enter all dates as YYYYMMDD

Seq	Delete	From Date	To Date	Place	Billed CPT	Mod1	Mod2	Mod3	Mod4	Diag Ptr.	Amt. Charges	Qty. Units	Amt. Paid	Paid CPT
001	Delete	20100210	20100210	11	90154	M1				1	00000040000	001	00000040000	90154
002	Delete	20100211	20100211	12	54234	M2				2	00000005500	001	00000005500	54234
003	Delete	20100211	20100211	11	90334					2	00000004500	001	00000004500	90334
004	Delete													
005	Delete													
006	Delete													
007	Delete													
008	Delete													
009	Delete													
010	Delete													
011	Delete													
012	Delete													
013	Delete													

Accept Line Items Add More Rows [Place of Service Codes Legend](#) [EOBR Code Legend \(See MEIG Appendix E\)](#)

This adds 10 blank rows to the grid. If you only have 3 lines to add, don't worry about deleting the other 7 blank lines. The system will automatically delete any lines that you don't enter anything on. When you are done editing all the line items, click on the "Accept Line Items" button to exit the Edit Mode and return back to the read-only view.

ERRORS RETURNED BY DWC:

Err#	Line	Field ID	Field Name	Field Value	Error	Error Message
001	000	4A		09999	066	Insurer/TPA not authorized for submitter
002	000	5A		951111111	058	Invalid code, ID, or value specified

The section above displays the errors returned by DWC (if any) after a form has been submitted to DWC and processed. You normally do not have to pay attention to this section, as the system will automatically highlight any failing field in red background so that it is easy to locate and correct the errors. Please also note that when you hover your mouse over a red failing field, it will display more helpful details about the reason that the field was rejected by DWC. Here is a sample of what it looks like:

FORM PROCESSING INFORMATION (Fields not on the Page)

Insurer ID **09999** OLD RELIABLE INS CO

TPA ID Insurer/TPA not authorized for submitter

Claim ID # KDTOK 55 Office

FORM STATUS AND PROCESSING INFO:

Form Input or Imported by Steven McKenna on 09/08/2011 12:47PM

Last Modified or Processed by Steven McKenna on 09/13/2011 3:12PM

DataVault Status PENDING

Current DWC Status [When should I change this?](#) Last DWC Processing Result on

Bypass Reason (if Bypassed)

Select the Next DWC Transaction for this Form Original Submission

Finally, the bottom section of the page (shown above) displays the processing status of the form. It shows who entered the form into the system and exactly when. It also shows who the last person was to modify the form and when.

It shows the DataVault Status, which can be any one of the following values:

- PENDING = Newly created or imported form (not yet submitted to DWC)
- SUBMITTED = Form staged for submission to DWC
- TRANSMITTED = Form transmitted to DWC, awaiting results
- PROCESSED = DWC processing of form completed

It shows the Current DWC Status, which can be any one of these values:

- ACCEPTED = Form was accepted
- REJECTED = Form was rejected
- WITHDRAWN = Form was successfully withdrawn per your request
- REPLACED = Form was successfully replaced per your request

It shows the Last DWC Processing Result, which can be all of the same values as above, with the addition of "BYPASSED" if the form could not be processed. If the form was BYPASSED by DWC, then the reason why it was bypassed will be displayed on the screen on the next line.

After you are done entering or correcting the form, you will need to select the DWC Transaction to perform when you submit the form to DWC. The system automatically defaults the selection for you to the choice that makes sense, depending upon the current DWC Status of the Form. For example, for brand new forms, the only choice is to submit an "Original Submission" transaction. Alternatively, if the form was rejected by DWC and you have just corrected it, the only choices will be "Correction of a Rejected Form" or "Withdraw / Cancel Form". Here are the various DWC Transaction Types:

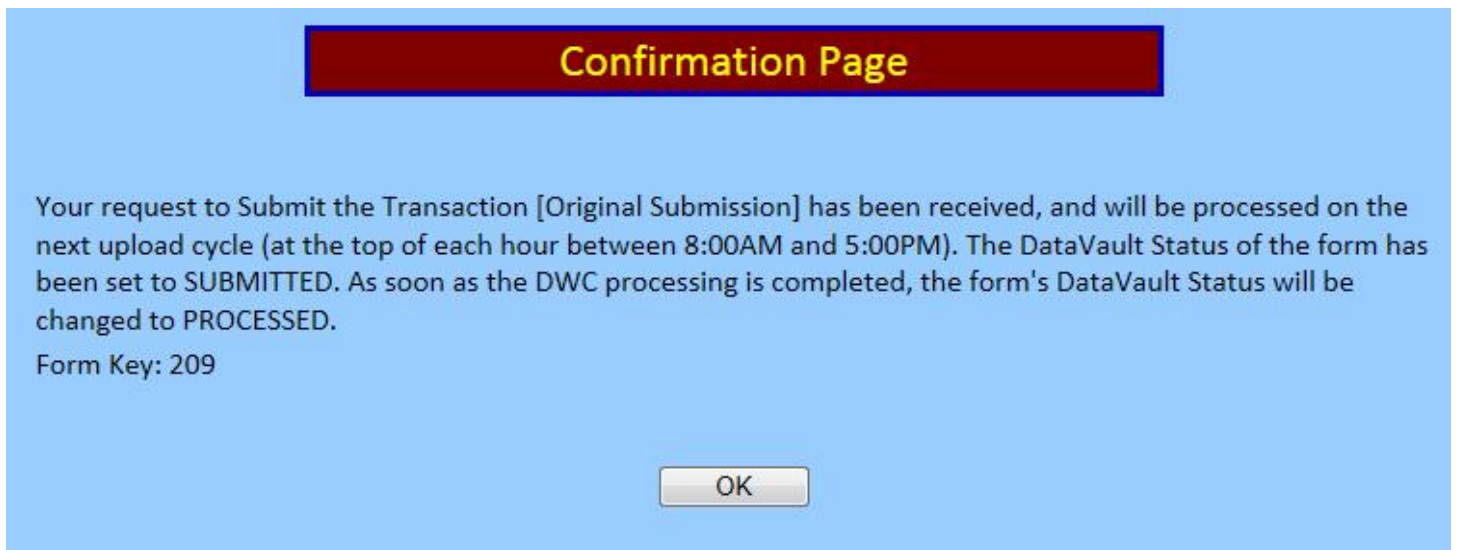
- Original Submission
- Cancel / Withdraw Form
- Correction of previously Rejected Form
- Replace previously Accepted Form

If you do not have all of the information that you need to finish entering or correcting a form, you can save the form as "pending" without submitting it to DWC by clicking on the button "Save Form as Pending (do not submit to DWC)".

Please note that you do not have to use this window to Submit the forms to DWC. You can save the forms as pending throughout the day, and at the end of the day you can use the Form List Window to submit them all at once to DWC for processing. The Form List Window will be covered in detail shortly.

3.5 Handling Errors

When submitting a form, you will normally be shown a confirmation screen that looks similar to the following:



When you Submit or Save a form, if you notice that the system appears to be staying on the same page and is not displaying the confirmation window, it is probably because there is an error message that needs your attention at the bottom of the web page. You will need to scroll to the bottom of the web page to see the error message:



3.6 Searching for Forms in the DataVault System

To search for existing forms in the DataVault database, click on the Main Menu button “Search for Existing Medical Forms”. You will be presented with the search window below:

As you can see above, there are many search criteria that you can use to locate forms in the system. If you enter information in multiple search fields, your query will search for all of the forms that meet ALL of the conditions that you specify. If you enter a partial first or last name, the query will search for all forms that have Injured Employees with names that start with the partial name that you entered.

After submitting a batch of forms to DWC, a common activity using this window would be to search for all forms that have a DWC Status of “REJECTED”, so that you can go in and correct each one and resubmit them to DWC.

3.7 Form List Window

When you click on the Search button, you will see the results presented on the Form List Window as follows:

Form List Window												
Select	Form Key	Claim Number	Control #	Date Input	Form	IE Name	SSN	DataVault Status	DWC Status	Insurer ID	TPA ID	Cus
<input type="checkbox"/>	68	2225558 A	2801124100029	08/29/2011	11	TESTBILL, CLARK	023-45-6714	PROCESSED	REJECTED	09999		Cre
<input type="checkbox"/>	67	KDTOK 55	2801124100028	08/29/2011	11	TESTBILL, RALPH	023-45-6713	PROCESSED	REJECTED	09999		Cre
<input type="checkbox"/>	66	6712 888	2801124100027	08/29/2011	11	EXAMPLE, JAMES	023-45-6712	PROCESSED	REJECTED	09999		Cre
<input type="checkbox"/>	65	DAV88456.	2801124100023	08/29/2011	11	TESTBILL, SAMANTHA	023-45-6708	PROCESSED	REJECTED	09999		Cre
<input type="checkbox"/>	64	1734T223.	2801124100022	08/29/2011	11	EXAMPLE, GEORGE	023-45-6707	PROCESSED	ACCEPTED	09999		Cre
<input type="checkbox"/>	63	2519S-041	2801124100021	08/29/2011	11	TESTBILL, PATRICK	023-45-6706	PROCESSED	WITHDRAWN	09999		Cre
<input type="checkbox"/>	62	4445558 A	2801124100020	08/29/2011	11	SAMPLEBILL, MICHAEL	023-45-6704	PROCESSED	ACCEPTED	09999		Cre
<input type="checkbox"/>	61	4445558-A.	2801124100019	08/29/2011	11	SAMPLEBILL, MICHAEL	023-45-6704	PROCESSED	ACCEPTED	09999		Cre
<input type="checkbox"/>	60	000254ALE	2801124100018	08/29/2011	11	EXAMPLE, KATRINA	023-45-6703	PROCESSED	ACCEPTED	09999		Cre
<input type="checkbox"/>	59	777-55545.	2801124100017	08/29/2011	11	SAMPLEBILL, YOLANDA	023-45-6702	PROCESSED	ACCEPTED	09999		Cre
<input type="checkbox"/>	58	555-0245M.	2801124100016	08/29/2011	11	TESTBILL, MICHAEL	023-45-6701	PROCESSED	ACCEPTED	09999		Cre
<input type="checkbox"/>	57	TEST66459	2801124100015	08/29/2011	10	SAMPLEBILL, CAROL	023-45-6715	PROCESSED	ACCEPTED	09999		Cre
<input type="checkbox"/>	56	2225558-A	2801124100014	08/29/2011	10	TESTBILL, CLARK	023-45-6714	PROCESSED	ACCEPTED	09999		Cre
<input type="checkbox"/>	55	KDTOK-55	2801124100013	08/29/2011	10	TESTBILL, RALPH	023-45-6713	PROCESSED	ACCEPTED	09999		Cre

This is kind of like the Grand Central Station of the DataVault, so there is a lot of functionality to cover here. First of all, notice that the system does not try and display all of the records at once (there could be thousands of records in the search results). Instead, there is a paging control near the bottom of the window that allows you to page back and forth in the records (i.e. – Next, Previous, First, Last buttons). This control also shows you how many records there are, and how many pages there are, and which page is currently being displayed.

Next, please note that each column is sortable by clicking on the hyperlink column header. For example, the results normally display sorted by Date Input (descending) order, so your most recently input forms appear first. If you want to sort by IE Name instead, just click on the “IE Name” column heading. If you click on it a second time, it will perform a reverse (Z to A) sort of the names.

The most basic functionality provided by this Form List Window is to give you a way to get into each form and view or edit the form. In order to View/Edit a form, simply click on the Form Key hyperlink on the left side of the window.

Next, notice the checkboxes next to each form. This is used to “Select” one or more forms in preparation for taking some action on those form(s). There are several buttons at the bottom of the screen that can act on a group of “selected” forms. The first one is the “Delete Selected” button. If you click this after selecting one or more forms, the system will delete those forms (after prompting you to make sure first). The other button that acts on “Selected” forms is the “Submit” button. You can select one or more forms, then select the “Batch Submit to DWC” transaction, then click on the Submit button to submit all the forms at once with the specified transaction.

The “Select All” button selects all forms in the result set (not just the ones on the displayed page). The “Un-Select All” button de-selects all the forms.

The “New Form” button is used to create a new form (you will be taken to a window where you choose which form type you want to input).

The “Export” button allows you to save the results to a tab-delimited data file so you can load the information into Excel and analyze it.

Finally, notice that there is a horizontal scroll bar at the bottom of the grid. There are a lot of columns that are being displayed, so you must scroll horizontally if you are interested in seeing any of the other columns to the right. In particular, if you are using the “Batch Submit to DWC” feature, then there is a column on the very right-hand end called “Validation Errors” that will display any problems that the system encountered while trying to submit each form. You will be instructed by a red error message at the bottom of the screen to look for this column if there are any problems submitting any of the forms.

3.8 View Recently Worked On Forms Window

From the Main Menu, you can quickly re-visit all of the forms that you have recently worked on by clicking on the “View Recently Worked on Forms” button. You will see the following window:

Recently Worked on Forms

Form Key	Claim Number	Control #	Date Input	Form	IE Name	SSN	DataVault Status	DWC Status	Insurer ID	TPA ID	Cust
82	92949-123		09/08/2011	09	SMITH, JOHN	111-22-3333	PENDING		00143	06092	Crea
67	KDTOK 55	2801124100028	08/29/2011	11	TESTBILL, RALPH	023-45-6713	PROCESSED	REJECTED	09999		Crea
82	92949-123		09/08/2011	09	SMITH, JOHN	111-22-3333	PENDING		00143	06092	Crea
82	92949-123		09/08/2011	09	SMITH, JOHN	111-22-3333	PENDING		00143	06092	Crea
82	92949-123		09/08/2011	09	SMITH, JOHN	111-22-3333	PENDING		00143	06092	Crea
73	4445558 A.	2801124100034	08/29/2011	90	SAMPLEBILL, MICHAEL	023-45-6704	PROCESSED	WITHDRAWN	09999		Crea
82	92949-123		09/08/2011	09	SMITH, JOHN	111-22-3333	PENDING		00143	06092	Crea
55	KDTOK-55	2801124100013	08/29/2011	10	TESTBILL, RALPH	023-45-6713	PROCESSED	ACCEPTED	09999		Crea
63	25195-041	2801124100021	08/29/2011	11	TESTBILL, PATRICK	023-45-6706	PROCESSED	WITHDRAWN	09999		Crea
67	KDTOK 55	2801124100028	08/29/2011	11	TESTBILL, RALPH	023-45-6713	PROCESSED	REJECTED	09999		Crea
76	1734.T223	2801124100037	08/29/2011	90	EXAMPLE, GEORGE	023-45-6707	PROCESSED	REJECTED	09999		Crea
79	KDTOK-55.	2801124100043	08/29/2011	90	TESTBILL, RALPH	023-45-6713	PROCESSED	REJECTED	09999		Crea

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Close

Note: It may take a while for this window to fill up with the list of your 100 most recently viewed forms.

This window looks similar to the Form List Window, but instead of searching for forms, you are looking at the most recently worked on forms with the top line showing the last form you worked on. This window will keep a history of the last 100 forms that you worked on. You can click on the Form Key hyperlink to view or edit each form.

3.9 View List of Authorized Insurer/TPA ID Numbers

From the Main Menu, you can pull up a list of all the Insurance Companies and Third Party Administrator Companies that you are authorized to submit data for by clicking on the button “View My Authorized Insurer/TPA ID Numbers”.

My List of Authorized Insurers & TPA's

ID #	Zip Code	Company Name	City, State	Type	Status
00143	33630	LIBERTY MUTUAL INSURANCE CO	TAMPA, FL	CLAIMS	OFF CLO
06097	28277	HELMSMAN MANAGEMENT SERVICES INC	CHARLOTTE, NC	CLAIMS	ACTIVE
06999	00000	NO TPA CODE FOUND	,		INACTIVE
09999	32399	OLD RELIABLE INS CO - TEST INSURER - EDI	TALLAHASSEE, FL	CLAIMS	ACTIVE

Note: If you need to add or remove any Insurance or TPA compaines to/from your list, please email your request to techsupport@creativedatatech.com, and we will take care of this for you, as we will need to also notify DWC in advance of any changes.

[Search Entire DWC Database of Insurers & TPA's](#)

When you first establish a DataVault Account, you will need to provide us with this list of authorized Insurance Companies or TPA's that you will be submitting for. We will enter it into the system for you. If you ever need to add a new company to this list, simply email us and let us know so we can add it to our list.

The system will block or prevent you from submitting a claim to DWC with an Insurer or TPA ID number that you have not been authorized to submit for.

3.10 Importing Forms

The DataVault System has a very flexible import capability. There are two main options here. The first option is for you to use the “Standard” import bridge. There is a different Standard import bridge for each form type. Use this option if you have an I.T. department that has the capability to take the import specifications document and program the extract data files required. The second option is to have us custom-program an import bridge to meet your particular needs. This option is typically used when you do have some limited capabilities to export data from your Claims Management System but cannot properly reformat the results as required for the import. We have done hundreds of these custom import bridges, and as long as the raw data is present, we can program a bridge to pull the data out of the files.

To access the Import Window, click on the Main Menu button “Import Medical Forms Data”. You will see the following screen:

Import Medical Forms

Use this window to Import Medical Forms from data files you generate (extract from your system) into the DataVault Database. See hyperlinks below for file Import Specifications

Choose Import Bridge to use:
 Standard Tab-delimited DWC-09 Headers & Details Data Files, Revision E (Zipped up) ▼

Path to Claim Headers Data File (must be a .ZIP file):

Path to Claim Details Data File (must be a .ZIP file):

Update/Replace Forms already in the DataVault Database with matching Claim ID Numbers.

Import Specifications:
[DWC-09 Import Specifications](#)
[DWC-10 Import Specifications](#)
[DWC-11 Import Specifications](#)
[DWC-90 Import Specifications](#)

Notice at the bottom of the screen that there are hyperlink shortcuts to each of the Import Specification documents for each of the 4 Form Types.

Please note that prior to uploading your data files, you must zip them up into a .ZIP file using WinZip or some other compatible compression tool.

Assuming you are using the Standard Import Bridge for a particular form type and have prepared your zipped up data files, all you need to do is select the Bridge Type for the forms you are importing. Next, use the two “Browse” buttons to select the Headers and Details data files, and then click on the “Import Forms” button. If there are any problems, the errors will be displayed at the bottom and no forms will be imported.

There is an important checkbox called “Update/Replace Forms already in the DataVault database with matching Claim ID Numbers”. Let’s talk about workflow for a moment. For example, let’s say you have imported a batch of 100 forms into the system, submit them to DWC, and then 10 of the forms come back as REJECTED. At this point, you have two choices; you can either use the DataVault System to pull up and edit each form to correct the errors and resubmit each one to DWC, or alternatively, you can correct the forms on your Claims Management System and re-import the forms into the DataVault System and have it over-write (replace) all the existing forms. If you are doing this, you will need to check this “Update/Replace Forms” checkbox so that the system won’t think you are mistakenly uploading duplicate forms into the system. When you use this checkbox and replace forms in the DataVault with newly imported forms, it will not disturb the current DWC

Status of each form, which is critical for being able to submit correction transactions for REJECTED forms.

The “Claim ID Number” field is a critical field, and you must assign a unique Claim ID Number for each form in order for everything to work smoothly.

If all the forms import successfully, you will get a confirmation screen letting you know how many forms were imported. If there are any problems with the import, you will be shown the errors, and it will stay on the import window.

3.11 Exporting Forms

The DataVault System has a powerful Export capability. From the Main Menu, click on the “Export Medical Forms Data” button:

Export Medical Forms

Use this window to Export Forms from the DataVault Database for Offline Analysis using Microsoft Excel (Tab-delimited .TXT Files). The Exported data consists of two data files; the Claim Header Records File, and the Claim Detail Records File.

Select the Form Type to Export **DWC-09** See hyperlinks below for Exported File Layouts

Select which Forms to Export:

- Use Last Search Criteria used on Form Search Window (35 Forms)
- Use the Date Input Range below
- Attempt to Export ALL my Forms of the Selected Type above

(Format dates as MM/DD/YYYY)

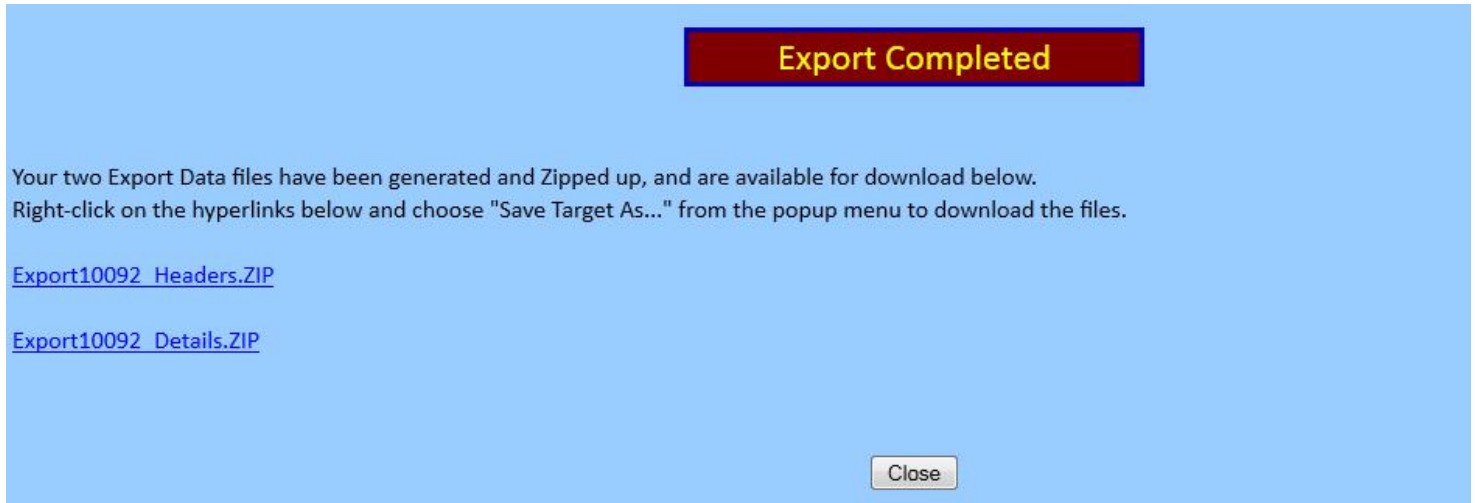
Export File Layout Specifications:

- [DWC-09 Export Specifications](#)
- [DWC-10 Export Specifications](#)
- [DWC-11 Export Specifications](#)
- [DWC-90 Export Specifications](#)

As you can see, you have 3 different options for exporting the forms data. With the first option, you can just have the system use the last Search Criteria that you used on the Form Search Window. The next option is to use a Date Input Range to locate the forms to export. The last option is to have the system attempt to export ALL of the forms for the selected form type. If there are too many forms to download, you may get a connection timed out error while trying to download the file. If this happens, then you will need to use the second option instead and specify a date range and break the forms up into separate downloads.

Notice at the bottom of the window that there are Export Specification Documents hyperlinks. These are the exact same file layouts as the Import Specifications.

After you click the “Export Forms” button, the system generates the export data files (headers and details) and then zips them up into a .ZIP file and presents a hyperlink for you to download the exported data files:

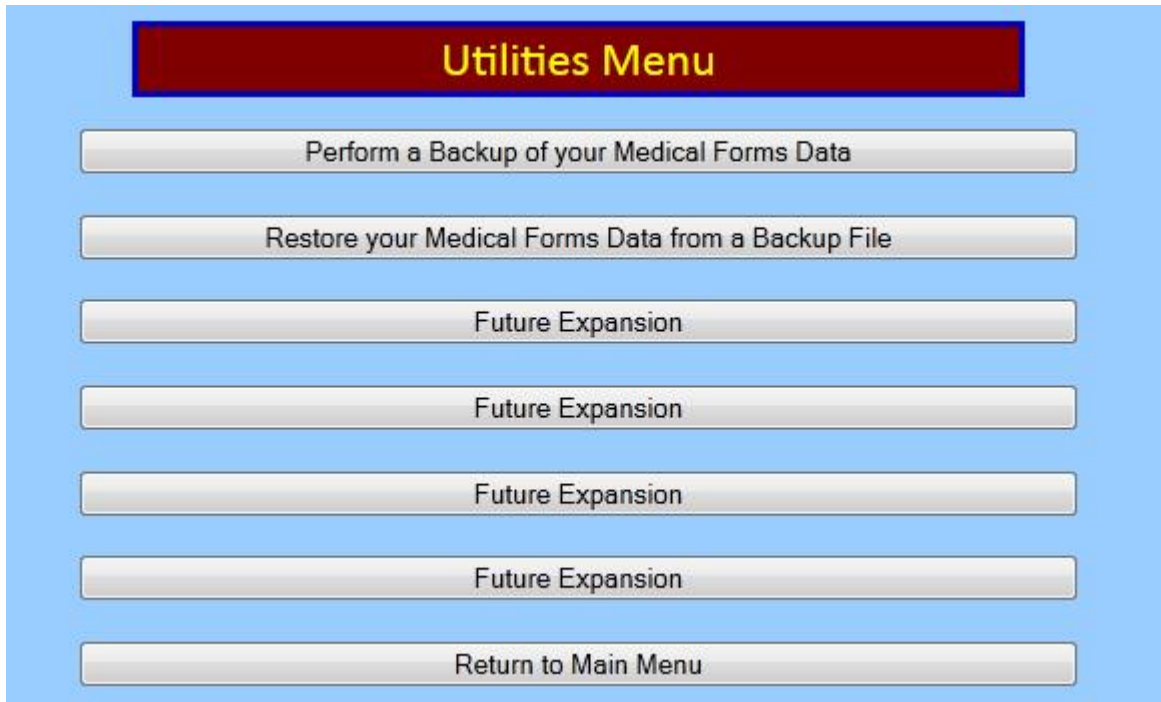


3.12 Backing up your Forms

The DataVault Database is backed up on a nightly basis, and the backups are kept off-site. Therefore, we are performing due diligence to ensure that the database will be able to be recovered in the event of hardware failure or natural disaster (fire, flood, wind storm, etc.). However, we are human, and in the event that for some unforeseen technical reason we are unable to restore your forms after a data loss event, there is a chance that we will contact you and have you restore your forms data from your backups. The backup facilities in the DataVault System are flexible and easy to use. As far as how often you should perform backups of your data, we recommend that you perform weekly backups. However, this is a “just in case” backup that will only be used if the backups performed by Creative Data Technologies fail for some reason. To date, we have not had to involve the customer even once for recovery of any data. Over the years, we have had two hardware failure events, and the backup measures that we were taking were able to successfully recover all the data without any loss.

Once a form has been reported to DWC and accepted, it will no longer need to be modified. Therefore, you should use the Date Input Range for creating your backups. Once a certain date range has been backed up (after all the forms from that date range have already been processed and accepted by DWC), you can put it away and never back up that same set of forms again for that date range.

In order to back up your medical forms data, click on the “Utilities Menu”....



The Backup and Restore menu options are kept on this “Utilities” menu to keep them out of view from the Main Menu because they are not frequently used. We did not want the customer to get confused between the Backup/Restore functions and the Import/Export functions. The main difference between the Backup/Restore functions and the Import/Export functions is that the Import/Restore only contains the actual medical data, whereas the Backup/Restore contains the complete information about the form, including both the medical data as well as the current DWC & DataVault Status for the form, the dates the forms were input and processed, etc. If all you had on hand was an Export it would not be able to be used to properly restore your forms data because it would not have any information about you having submitted each form to DWC (and what the results were). The backup data files contain all this information.

In order to back up your medical forms data, click on the “Perform a Backup of your Medical Forms Data” button. You will see the following window:

Backup your Medical Forms Data

Use this window to make a raw backup file containing a complete backup of your medical forms data, including Header Records, Detail Records, Error Records returned by DWC, and complete Status Information for each form. Creative Data Technologies, Inc. does perform due diligence by making regular offsite database backups, and in almost all circumstances we will be able to recover the database from our own backups. However, we are providing you with this backup capability so that you can make your own backups, just in case our database backups cannot be restored by us for some unforeseen reason, so that you will have your backups available to restore your own data. You can also use the backup file if you accidentally delete some Forms from the system. The Restore Window is very flexible, as it allows you to focus on a particular Form Type, Input Date Range, and even down to a specific Claim ID Number to restore.

Specify the Input Date Range for the Forms to include in the Backup File:

Date Input Range  to  (Format dates as MM/DD/YYYY)

Create Backup File

Close

Before using the Backup Window, please read the message at the top of the window very carefully. To back up your forms data, simply enter the date range and then click on the "Create Backup File". After the backup data file has been generated and zipped up, you will see the following window where you should be able to download your backup data file:

Backup Completed

Your Backup Data file has been generated and Zipped up, and is available for download below. Right-click on the hyperlink below and choose "Save Target As..." from the popup menu to download the file.

[Backup_20110626_20110905_10092.ZIP](#)

Close

3.13 Restoring your Forms

To access the Restore Window, click on the "Restore your Medical Forms Data from a Backup File" button. You will see the following screen:

Restore your Medical Forms Data

****** CAUTION! READ THE INFORMATION BELOW, AND PROCEED VERY CAREFULLY! ****
CONTACT US FIRST IF YOU HAVE ANY DOUBTS WHATSOEVER!**

Use this window to restore Forms that have somehow been accidentally deleted or lost from the DataVault Database. In almost all situations where there is data loss due to a System Failure of the DataVault Servers, your data will be restored by our staff from our own backup images, and you will not need to restore the data yourself. However, if you accidentally delete one or more forms, or if you have been contacted by our staff indicating that your data could not be restored, then these are the two situations where it would be appropriate to use this window. Please be aware that this window will over-write any existing forms that match the forms from the backup file that you are restoring (matching Claim ID Number & Input Date). This Restore Window is very flexible, as it allows you to focus on a particular Form Type, Input Date Range, and even down to a specific Claim ID Number to restore.

Specify the Filter Criteria for the Forms to Restore from the Backup File:

Select the Form Type to Restore (leave blank for ALL claims, regardless of Claim ID Number)

Date Input Range to (Format dates as MM/DD/YYYY)

Note: You can leave the dates above blank to simply restore ALL the forms from the file, regardless of the Input Date.

Path to Backup Data File to Restore Forms from (must be a .ZIP file):

Again, you should rarely (if ever) have to use this window. Please contact us first before you use this window just to be sure you are doing the right thing. You don't have to restore ALL the forms from the backup file. You can select exactly which forms to restore from the backup file using the filter criteria fields. Using this "filtered restore" capability, you can easily restore one or more forms that you have accidentally deleted.

3.14 Viewing the Activity Log

While you are using the DataVault™ System, it keeps track of what you have done. If needed, you can go back and review your history of activity on the system using the Activity Log. To view the Activity Log, click on the "Activity Log" button on the top toolbar of the website:



You will be presented with the following Activity Log Window:

Customer Activity Log

Enter Activity Date Range: From to

Date & Time	User ID	Activity Type	# Records Involved	Record ID
9/15/2011 7:43:36 AM	jfreymiller	Login	1	
9/14/2011 4:32:24 PM	jfreymiller	Ran Activity Log Query	1	
9/14/2011 4:32:20 PM	jfreymiller	Login	1	
9/14/2011 8:16:05 AM	jfreymiller	Logout	1	
9/14/2011 8:15:58 AM	jfreymiller	Data Record Updated	1	73684082011
9/14/2011 8:15:57 AM	jfreymiller	Record Validation Performed	1	73684082011
9/14/2011 8:14:47 AM	jfreymiller	New Data Record Created	1	943935
9/14/2011 8:14:42 AM	jfreymiller	Data Record Updated	1	104304072011
9/14/2011 8:14:41 AM	jfreymiller	Record Validation Performed	1	104304072011
9/14/2011 8:12:59 AM	jfreymiller	New Data Record Created	1	943932
9/14/2011 8:12:53 AM	jfreymiller	Data Record Updated	1	104284052011
9/14/2011 8:12:52 AM	jfreymiller	Record Validation Performed	1	104284052011

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Total usage units used for the selected Date Range

By default, the window only shows the activity for the current month, but you can change the date range and search for any date range that you need to. It also shows the Record ID (Claim ID) that was involved with each activity. If it was an import, export, or deleting of records, it will show you how many records were involved in the activity.

End of Document.