2024 WHAIC Survey Update

Heather Scambler, RHIA, CPC-A, Program Specialist

Cindy Case, BA, COC, Director, Data management and Integrity

Justin Flory, BS, Health Care Data Programmer

Brian Competente, Vice President

2024

- About Us & Data Use
- Survey Website/Calendar Updates
- Important Updates/SSO/Roles & Registration
- NEW Survey application & Changes to Manuals
- Survey Submission Process
- Edits/Reports
- Affirmation & Schedule C

WH+A | INFORMATION CENTER

The WHAIC Team

Brian Competente
Vice President

Cindy Case
Director of Data Management and Integrity

Seth Hayden
Chief Information Security Officer

Amber Hollerich
Health Care Data Analyst

Steve Trinkner
Data Analyst

Phyo Aung
Data Visualization Analyst

Justin Flory
Health Care Application Developer

Emily Holden
Data Operations Specialist

Heather Scambler
Program Specialist

Janice Williams
Application Development Manager/Lead Developer

1989

Chapter 153 created; State carries out data collection

Oct. 2003

State hands off data collection to the WHA Information Center

Jan. 2004

WHAIC begins data collection, analyzing & sharing

2005

PricePoint, a price transparency tool, is created

2006

CheckPoint, a quality improvement tool, is created

The Wisconsin Hospital Association Information Center (WHAIC) is

CELEBRATING TWO DECADES

of Using Data to Improve the Health of Wisconsin Communities.

WHA | INFORMATION CENTER

The Respected Source for Health Care Data

2016

Health Care Data Modernization Act signed into law

2019

WHAIC receives Medicare QE Designation

2020

COVID-19 Situational Awareness Dashboard is created

2023

PricePoint is redesigned

Oct. 2023

WHAIC celebrates 20 years

100%
OF WI HOSPITALS PROVIDE DATA

COVID DASHBOARD:
1.6M
VIEWS TO-DATE

PRICEPOINT:
15K
VIEWS PER MONTH

100%
FAVORABLE REVIEW FROM THE STATE

A STRONG PARTNER OF THE STATE

- WHAIC collects hospital and ambulatory surgery center claims data on behalf of the state through Chapter 153.

- The state of Wisconsin provided one-time, start-up expenses of $750,000 to WHAIC. Since 2004, WHAIC has been entirely self-sustained, requiring no funding from the state of Wisconsin for data collection or its operations.

- WHAIC's fees are approved by the state of Wisconsin and are very affordable.

THE TRUSTED SOURCE OF HEALTH CARE DATA

- WHAIC is trusted by DHS, Wisconsin hospitals, and researchers at Wisconsin's world class universities.

- WHAIC adheres to strict data privacy and security controls, which has enabled WHAIC to receive Medicare claims data through the Medicare QE Designation- the only hospital association in the country to have this recognition.

- Since its inception, WHAIC has received a 100% favorable review from the Dept. of Administration.

A CLOSER LOOK:

WHA | INFORMATION CENTER
The Respected Source for Health Care Data

"WHAIC continues to make improvements in the accessibility, quality, and utility of hospital data...DHS is appreciative of this partnership and of WHAIC's continued efforts."

- Karen Timberlake, DHS Secretary, 2021-2022

CONTINUED ACHIEVEMENTS SOLIDIFY ITS IMPACT

- The Healthcare Data Modernization Act, hailed by lawmakers as one of the most important health care policy accomplishments that session, allowed hospital data to be analyzed at a more granular level greatly improving the ability to target community health and wellness resources.

- Increasing the utility of its data collected, WHAIC developed and has managed the Psychiatric Bed Locator and the Wisconsin COVID-19 Dashboard, which has received 1.6 million hits.

A ROBUST SET OF DATA PRODUCTS

- WHAIC provides data products available to data purchasers and the public, including data sets, ready-to-use dashboards, custom reports and several publications.

- For a complete list of data products, visit www.whainfocenter.com/Data-Products

In one year, WHAIC collects:

13.4M
TOTAL RECORDS COLLECTED

3.25M
UNIQUE PATIENTS

These millions of records represent over:

Yearly averages from 2019 - 2021.

$20B
IN COMMERCIAL CHARGES

$8.5B
IN MEDICAID CHARGES

$28.4B
IN MEDICARE CHARGES

Data Collected & Reported

Discharge/Claims Data *(*Mandated by WI Statutes, Chapter 153)*

- Hospital Discharge Claims (169)

- Ambulatory Surgery Centers (78)

- Quarterly / Monthly Data Submissions

- Collect over 3 million records per quarter

Data NOT Collected:

- Professional Fees

Data Collected & Reported

Hospital Surveys *(*Mandated by WI Statutes, Chapter 153)*

- Annual Survey of Hospitals

- Hospital Fiscal Survey

- Medicare Cost Report

- Uncompensated Health Care Survey

- Hospital Rate Increases

WHA | INFORMATION CENTER

Data Collected & Reported

How Data is Used

- Analytics
  - Standard Data Sets
  - Custom Data Sets
  - PricePoint
  - CheckPoint

- Annual Publications
  - Health Care Data Report
  - Guide to Wisconsin Hospitals
  - Uncompensated Care

- Workforce Analysis & Predictions

- Quality Reporting and Improvement

WHA | INFORMATION CENTER

Who Uses the IC Data?

Data Uses

- 84% of Wisconsin hospitals purchase data sets and/or custom data sets/reports from WHAIC.

- 23% of ASCs purchase data sets and/or custom data sets/reports from WHAIC

- Other purchasers of custom data sets and/or reports include Insurers, Researchers and Universities.

- Data is used for Price and Quality Transparency (PricePoint & CheckPoint)

Analytics

- WHAIC's data analytics tool (Kaavio) is provided at no charge to hospitals that purchase the data at the required level.
  - Users: 190
  - Hospitals: 113
  - ASCs: 20

- WHAIC and the Wisconsin Office of Rural Health (WIORH) offer the Rural Health Dashboard (RHD) as a way rural hospitals can use their SHIP program funding (Small Rural Hospital Improvement Grant).
  - There are 15 hospitals participating in 2024-2025.
  - The RHD consists of a suite of executive-level dashboards

Data Uses

- *Guide to Wisconsin Hospitals*
  - *Utilization*
  - *Services Provided*
  - *Staffing*
  - *Financial Information*

Data Uses

Vacancy Rates for Selected Hospital Professions
Source: WHA Information Center annual hospital survey
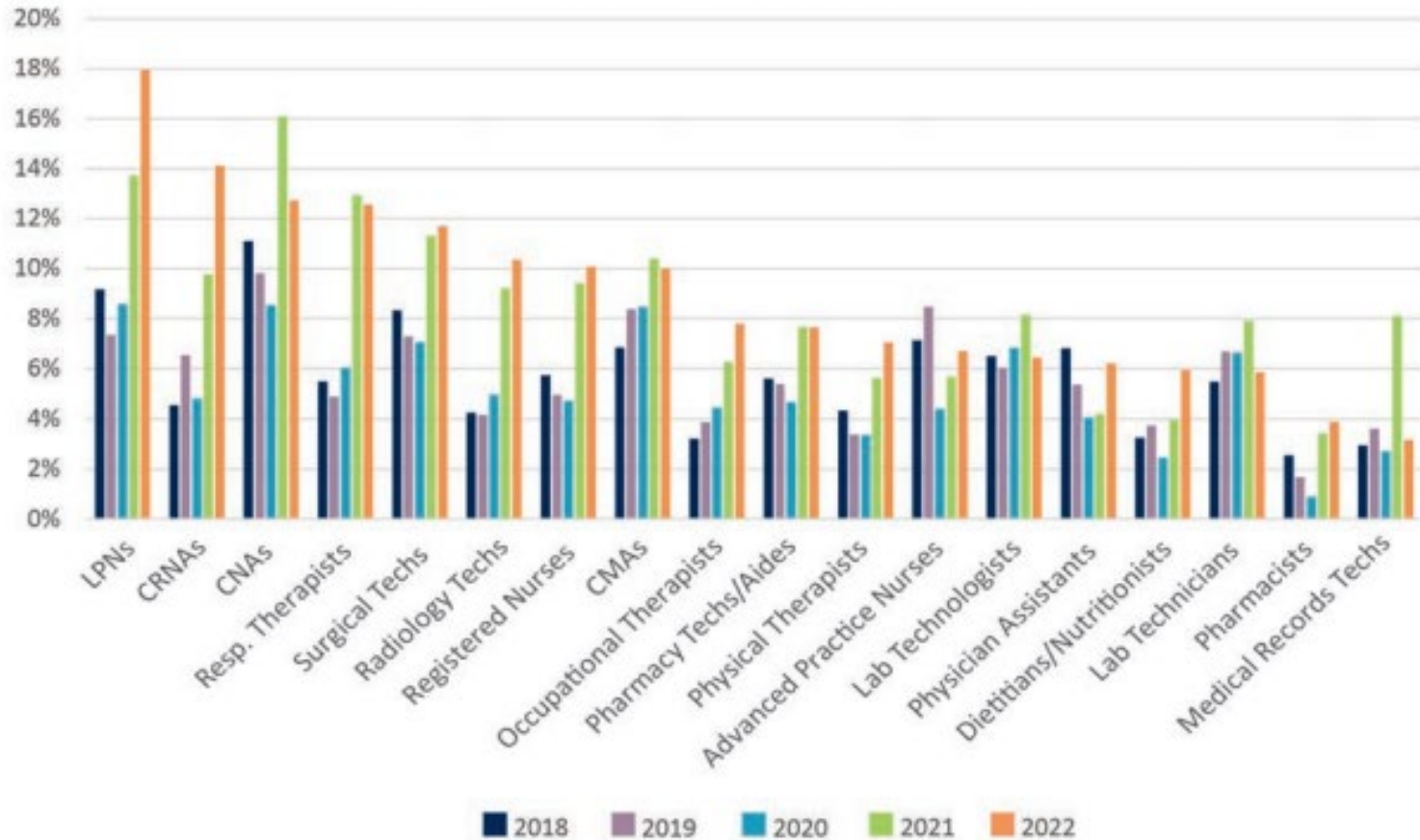
Data Uses

Turnover of 20% or More in 8 Professions
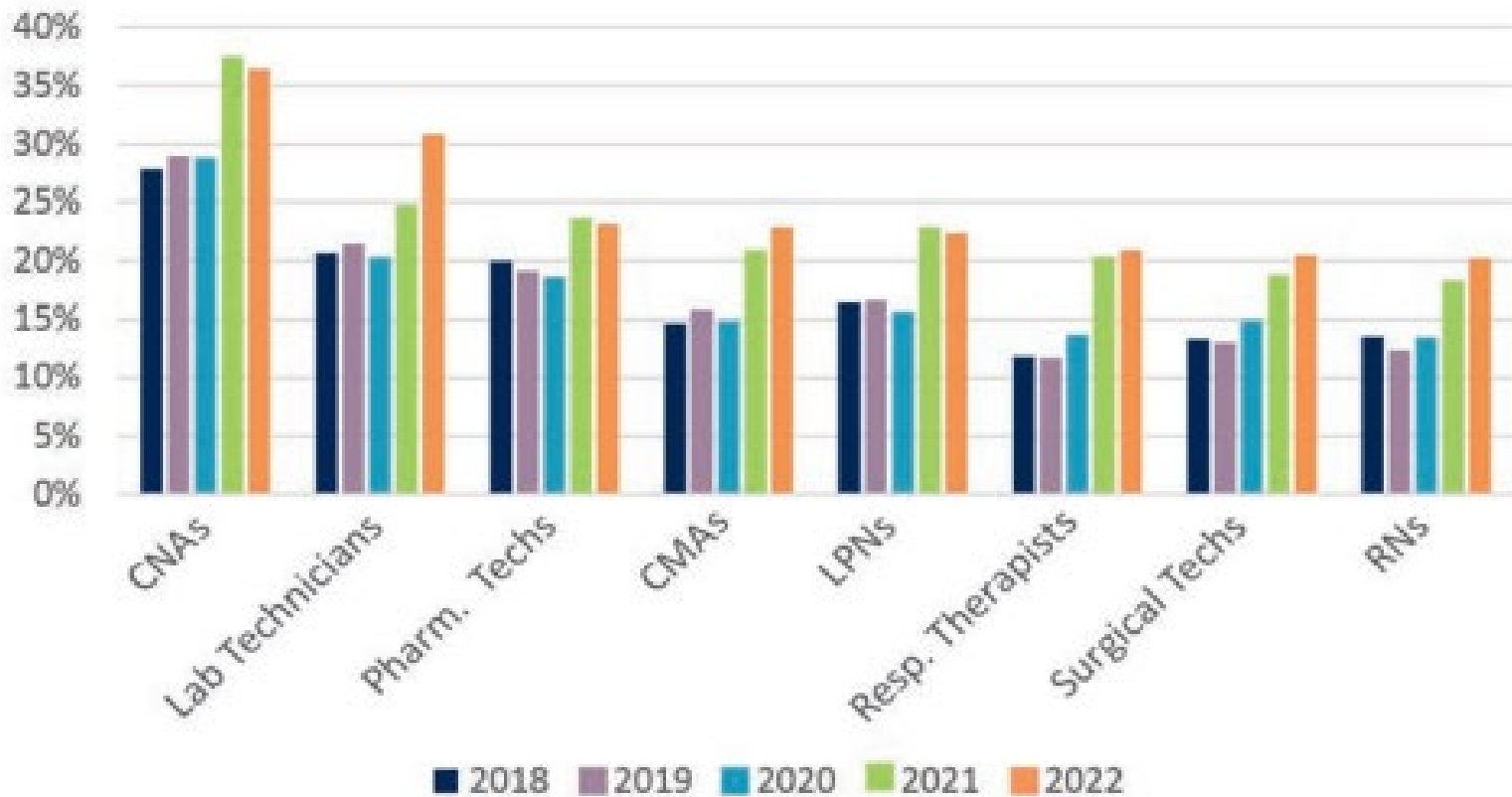
Impacts on Hospital Payor Mix

Statewide Medicare and Medicaid Margins 2015-2022
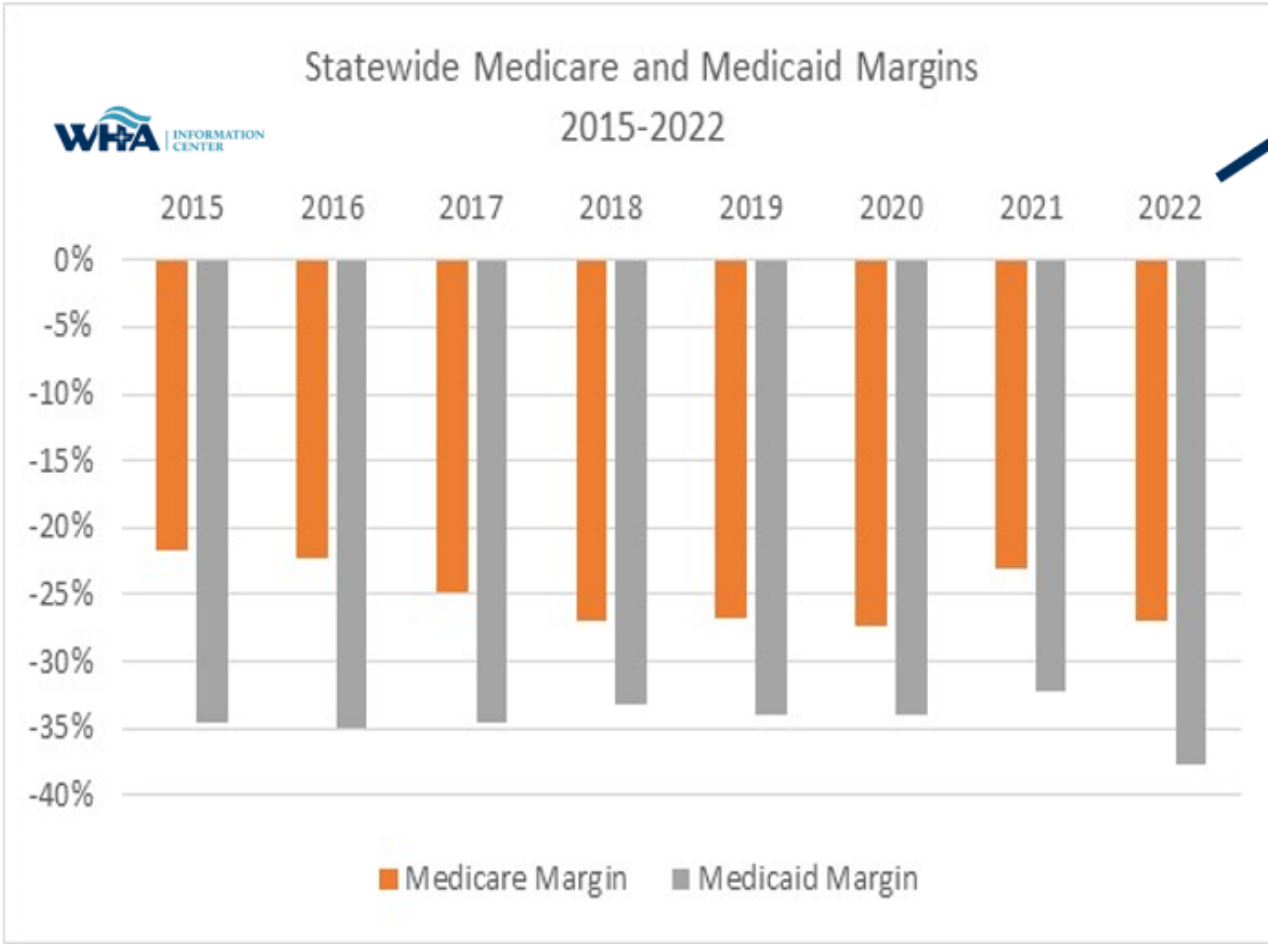
In 2022 WI Hospitals lost 27% on Medicare and 38% on Medicaid

- 7 hospitals over 50% Medicaid patients
- 11 are >40% Medicaid
- 58 are >15% Medicaid

Other Survey Data Uses

- Analytics of Health Systems

WI Hospitals Operating Margin	
FY2021	10.3%
FY2022	5.5%
FY2023	6.1%

WI Health Systems Operating Margin	
FY2021	4.5%
FY2022	-0.1%
FY2023	-0.8%

FY2023 Hospital Numbers at a Glance

82 ↓ operating margin

59 ↓ total margin

53 had negative operating margin (loss)

55 had negative total margin (loss)

13 Critical Access Hospitals had negative total margin (loss)

Operating Margin vs Total Margin FY 2019 - 2023
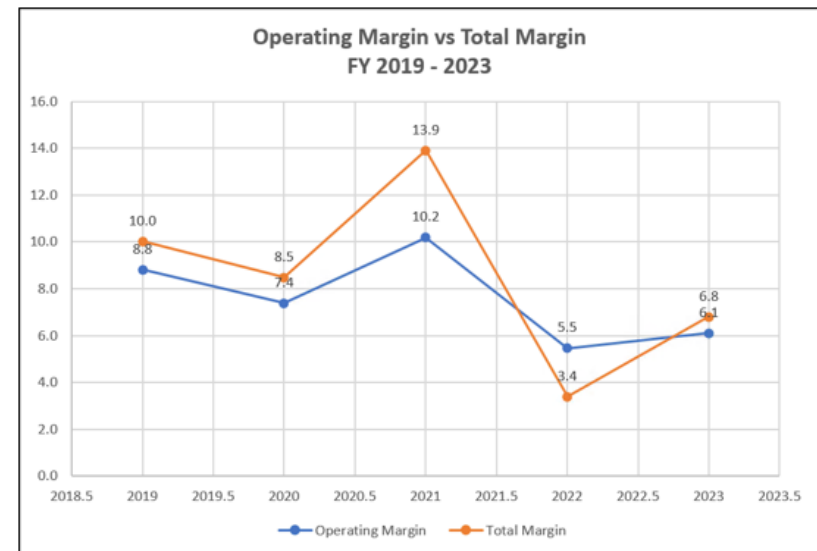
A recap of where survey data goes ☺

- **Annual/Personnel Survey**
  - Personnel survey has been combined with the Annual survey.
  - Collects vacancies of select employee categories; number of employees 55 and over; number of employee separations;
    - Customs & Workforce Development
  - Collects hospital information – Part of a system, type of hospital, certifications, etc. Reports the services that are provided at the hospital, number of beds, utilization, FTEs, and physicians.
    - Guide to Wisconsin Hospitals
- **Fiscal Survey**
  - Collects information on revenue and expense figures, gross patient charges and contractual adjustments by payer, balance sheet figures, and charity care and bad debt.
  - Guide to Wisconsin Hospitals & the Uncompensated Health Care report
- **Uncompensated Health Care**
  - Collects definitions related to eligibility for uncompensated care; income thresholds for financial assistance; and policies and procedures determining a patients' ability to pay.
    - Uncompensated Health Care Survey
- **Medicare Cost Report Schedule C**
  - Used to calculate hospital tax
- **Health System Survey**
  - Collects WI health care system information (if applicable)

See our Data Products webpage for more information on publications, custom reports, and data sets.

WHA | INFORMATION CENTER

WHAIC Website

Data Submitters

WHA Information Center (WHAIC) has been collecting hospital, ASC and survey discharge data as authorized by the Wisconsin Department of Administration, since 2003 as defined by Chapter 153, Wisconsin Statutes.

Inpatient and outpatient data is collected quarterly through a secure, web-based tool known as **WIpop** to produce public use data sets, custom data sets and three annual publications.

In addition, all Wisconsin hospitals submit Annual, Fiscal, Personnel and Uncompensated Care survey data annually. Data collected from these surveys are used for trending, benchmarking, and other key statistics.

For more information and access to the WIpop or Survey Data Submission Manuals, calendars, training materials, and other updates click on one of the pictures below.

[WIPOP LOGIN]   [SURVEY LOGIN]

Reporting Requirements

WIpop

Surveys

WHAIC Portal Login

Website Resources

Website Resources – Education & Training

Education & Training

WHAIC provides training for new and seasoned survey submitters throughout the year. Please reach out to whainformationcenter@wha.org for more information on upcoming training sessions. We welcome feedback on past trainings and ideas for content of upcoming training sessions.

Survey Submission & Compliance Manual

Training Documentation

Training Videos

WHA | INFORMATION CENTER

Website Resources – Registration & Other Resources

Registration & Other Resources

This section provides additional information to assist you in the submission of hospital surveys.

Please note: WHAIC cannot register users. For new registrants, please see Roles & Registration. Once registered, WHAIC will review all access requests and respond within 24-48 hours.

> *New: Fall 2024*
>
> Single Sign-on (SSO) Technology and new Survey Application
>
> *More information will be provided in October 2024*

- ☑ Roles & Registration
- ☑ Facility Listing
- ☑ Survey Functionality
- ☑ User Dashboard
- ☑ Survey Edit Checks

WHA | INFORMATION CENTER

Statutory Compliance

DHS 120.12 Data submission procedures

"Every hospital shall annually file with the department within 120 [4 – months] calendar days following the close of the hospital's fiscal year."

"The department may grant an extension for up to 30 calendar days."

Important New Facility Reminders

- **New facility/hospital requirements** – when a new facility opens:

  - Primary contact is required for WHAIC to communicate important information.

  - For newly opened facilities **only**, can wait to submit Annual/Personnel, Fiscal, Uncompensated surveys until there is a full fiscal year.

  - A Medicare Cost Report (MCR) is required, even if it is for a partial year.

  - If a facility is separately licensed by the [state](#), it's required to submit its own hospital Annual/Personnel, Fiscal, and Uncompensated surveys.

  - Hospitals sharing a MCR report need to notify WHAIC and determine the primary location; only need to submit one Cost Report survey and Worksheet/Schedule C.

Additional Statutory Reminders

- **Hospitals that close/mergers/acquisitions:**

    - Survey data is required from a closing facility to include the Uncompensated, Fiscal and Annual/Personnel surveys to the best of the facilities ability.

    - A Medicare Cost Report is required, even if it is for a partial year.

        Waiver from data submission requirements.
        1. <u>DHS 120.12(3)(f)1.</u>**1.** There shall be no waivers from the data submission requirements under this subsection. **2.** Hospitals that close, merge or change their reporting fiscal year shall submit an annual survey for the applicable partial year.
        2. There is no exception to uncompensated or fiscal survey submissions.

- **Hospitals that change fiscal years**
    - Ensure that the Annual/Personnel, Fiscal, Uncompensated and Medicare Cost Report includes **12 months of data**.

- **Notify us of all changes as soon as possible**

WHA | INFORMATION CENTER

Open	SURVEYS OPEN: First week of November
Calendar	Follow calendar to submit data by due date listed (based on FYE).
Affirm	Once all surveys are submitted, hospitals will receive an automated email notifying them that their affirmation statement is available.
Validate	Validate data, reopen surveys to make changes if necessary, and provide responses to action edits. *Keep in mind that reports/edits/affirmations are re-set each time surveys are reopened*
Submit	Submit Affirmation Statement and Copy of Schedule C by the Due Date.

Survey Submission Timeline

WHA INFORMATION CENTER

Survey Calendar

Hospital / Health System Survey Submission - Fiscal Year End 2024

Annual/Personnel*, Fiscal, Uncompensated, Medicare Cost Report and Health System

Surveys are open for submission on November 1	
MARCH – JUNE FYE **(APR/JULY 1 FY)**	
March – June FYE Extension Request Deadline	12/20/2024
March – June FYE *Standard* Submission Deadline	01/02/2025
March – June FYE *Extended* Submission Deadline (submit request by deadline)	02/03/2025
March – June Affirmation Deadline	**02/14/2025**
JULY – SEPTEMBER FYE **(AUG/OCT 1 FY)**	
July – September FYE Extension Request Deadline	01/23/2025
July – September FYE *Standard* Submission Deadline	01/31/2025
July – September FYE *Extended* Submission Deadline (submit request by deadline)	03/03/2025
July – September Affirmation Deadline	**03/14/2025**
DECEMBER FYE **(JAN 1 FY)**	
December FYE Extension Request Deadline	04/18/2025
December FYE *Standard* Submission Deadline	04/29/2025
December FYE *Extended* Submission Deadline (submit request by deadline)	05/29/2025
December Affirmation Deadline	**06/13/2025**
MEDICARE COST REPORT SUBMISSION	
January – June FYE Submission Deadline & Upload Schedule C Copy in Data Deliverables by Affirmation Deadline	02/03/2025
July – December FYE Submission Deadline & Upload Schedule C Copy in Data Deliverables by Affirmation Deadline	06/03/2025

- The timeline reflects adjusted (some combined) survey submission timelines to benefit hospitals to improve efficiency and prevent/reduce duplication of work and requests for additional time. If you are part of a state or county facility – please note the adjusted timeline accounts for additional time allowed for in the statute.
- ***Annual/Personnel Surveys** – Personnel survey was combined with the Annual survey in FY 2024.
- **Medicare Cost Report (MCR)** – complete survey and upload Worksheet C as applicable. Due dates are allowed to match CMS due dates. If given a CMS extension, please inform WHAIC as soon as possible via email.
- **Health System Survey** completion is included in the FYE timeline. If your facility is part of a system located in Wisconsin, please locate your 900 series facility ID in the facility drop down list to complete your system survey **for WI only.**

09/2024

Single Sign On Process – NEW for 2024

WHA | INFORMATION CENTER

NEW: November 15 - How to Access Survey

WE DO NOT ADD PEOPLE, THIS IS A SECURED PORTAL,

REGISTRATION IS REQUIRED!

What can you expect?

- On Thursday, **November 14**, you will receive a **"this is not spam"** email from us, walking you through what is going to happen on November 15.

- On Friday, **November 15**, you will receive a link to the Survey application via email from noreply@wha.
- This is an *activation ink* which is **an invitation to our system** that specifically says

- **"Click Here to Accept Invitation."**

- As a current user, you will not need to reregister to the site, however you will be required to accept the invitation and then authenticate your access to the site using an activation code.

One time acceptance invitation

- Example of the email:

Registration Confirmation

Thank you for signing up for a Wisconsin Hospital Association account.

Application access has been granted for

Click Here to ACCEPT INVITATION

↩ Reply   ↩↩ Reply all   ↪ Forward

Existing User Registration

Existing Users will automatically be added to the Survey Directory.

But first, two things will happen!

1) Users will get a "Click here to accept invitation" unless user already has a WHA account for one of the other applications we offer.

2) Microsoft Accounts. Once a user is approved, if their hospital/health system uses Microsoft Accounts, they will be prompted to enter their email address and password that they use to access Outlook, Word, Excel, etc. at their facility.
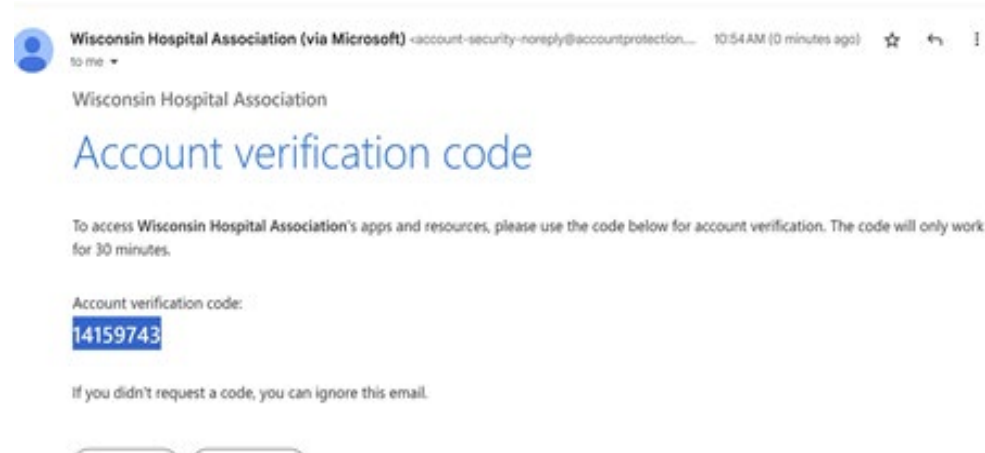
Microsoft Accounts - Single Sign On

- Single sign-on is an authentication method that allows users to sign in using one set of credentials to multiple software systems.

- Users sign into Survey using their own Microsoft 365 work account.

- Most will use their facility email address/credentials to access site.

WHAIC no longer requires a WHAIC username or password.

Survey

If you registered using a Microsoft account (hotmail, outlook.com, or business active directory account) you will log in with that email address and password.

Sign In

Register

WHA | INFORMATION CENTER

New User Login / Registration

1. Click Register

2. Choose Your Role

3. Activated within 24-48 hours

New Look and Feel

Sign In — **Existing user**

Register — **NEW USER**

WHAIC does not create accounts for users!

Creating an Account

- WHAIC will first verify if user has an active account

- <mark>If no email is registered,</mark> user will be required to register as a Survey User and select a role based on primary or user, as it relates to WHAIC Data Submissions.

Please enter your work email address to request access to WIpop. Note: *Enter your hospital or business email so that we can check our records to see if an account already exists.*

Submit

User Information

First Name*	Last Name*
Justin	Flory

Job Title	Email*
Healthcare Data Programmer	justin.florytest500@gmail.com

Business Phone*	Mobile Phone
5555555	

Organization*
WHA Information Center

Previous   Next

Authentication

- The Left slide is what you can expect from an authentication point.

- The Right slide is a one-time acceptance to access our secured site.

Roles and Responsibilities – Primary Contacts

Primary Contacts:

- Every facility must have at least one, but we prefer two Primary Contacts.

- Primary source to monitor the facility user's access.

- Receive communications of Survey submissions and extension requests (if they logged the request), notice of affirmations, and newly registered Survey users.

- Responsible for affirming the data and ensuring the Schedule C is uploaded.

- Authority to electronically sign and submit affirmation statement.

WH+A | INFORMATION CENTER

Roles and Responsibilities – Survey Users

Survey Secondary role was moved to Primary.

- There are now two roles, Survey Primary and Survey User.
    - Survey Users
        - Limited communications from WHAIC –contacted only in the event there is no response from Primary.
        - Surveys Users should expect to receive pertinent information from the Primary contact.
        - Access to all surveys but responsibility for compliance lies with the Survey Primary.
        - Authority to upload Medicare Cost Report Schedule C.
        - May freely contact WHAIC with survey contact changes/facility changes.

WHA | INFORMATION CENTER

Roles and Security Policy

- **Important:**

- We will continue to protect the data by:

- Reaching out to facilities when we receive bounce back emails.

- Monitoring and working toward at least two primary contacts.

- Facility is responsible for monitoring, updating and/or notifying WHAIC of any Staff changes or termed employees.

  - Contact us at: whainfocenter@wha.org

Survey Updates – NEW for 2024

WHA | INFORMATION CENTER

FY 2024 Highlights & Improvements

❖ Single sign-on authentication for registration.
❖ Survey application was updated with a new look and feel.
❖ Survey application with new toolbar highlights and functionality.
❖ Auto-save and the ability to view the instructions when scrolling through questions.

FY 2024 Current Improvements

❏ **ANNUAL SURVEY ENHANCEMENTS**

✓ The annual manual now has better explanations, more examples for the personnel Medical staff questions. It also has the survey questions that were added.

✓ There were a lot of questions the past two years regarding staffing. The hope is to make the data submission more efficient for you.

✓ Examples of questions added: Type of service – Cancer, Heart, Orthopedic; Nursing home RNs/Total personnel; NCQA certification; 5 inpatient unit questions; 17 new ancillary unit questions.

✓ Hospitalists and Intensivists were added to Medical staff.

✓ Sections that were added include Information Technology and Cybersecurity.

✓ Sections that were removed include: E-Health, Health Information Technology, some questions from the SDOH section and Supplemental Information.

FY 2024 Highlights & Improvements

❖ **Renumbering of several questions on the annual and fiscal survey, which means any spreadsheets you may have used need to be updated.**

❖ **Personnel survey was combined into the Annual survey.**

  ❖ Combining the Personnel survey with the Annual survey simplifies the data submission process, enhances the accuracy and relevance of the information collected, and improves the overall efficiency of data analysis.

  ❖ Still asking for the same information: FT Persons, PT Persons, PT Hours, FT vacant, PT vacant, Consultant/Contracted, Employees over 55 and Employee Separations, and the information is required for all personnel now.

❖ Administrators' definition updated; Directors/Managers, Environmental services, Food service, Psychiatric technicians and All other contract staff are new questions.

❖ Three (3) new personnel questions regarding advanced practice providers, foreign educated nurses and RNs hired from nursing schools.

FY 2024 Current Improvements

207. **Administrators**

FT Total No. of Persons (35 Hr/Wk or more)

PT Total No. of Persons (less than 35 Hr/Wk)

PT Total No. of P-T hours

FT Total No. of Vacant Persons (35 Hr/Wk or more)

PT Total No. of Vacant Persons (Less than 35 Hr/Wk)

PT Total No. of Vacant P-T hours

Number of Consultants and/or Contracted Staff

Employees Over 55

Employee Separations

FY 2024 Current Improvements

❖ **MORE EFFICIENT METHOD OF GATHERING DATA**

▪ For the inpatient and ancillary sections, the codes were changed from 1-5 to new ALPHA CODES.

  ▪ The new codes are H, S, C, N.

▪ We eliminated the O/B category all together.

▪ This update provides greater efficiency in gathering data.

Code	Description
H	Service is provided in or by the hospital. The number of beds and utilization information MUST be provided for inpatient units.
S	Service is provided by the hospitals Health Care System in the community.
C	Service IS NOT MAINTAINED by the hospital but is available, in the hospital or another facility, through a FORMAL CONTRACTUAL arrangement with another hospital or provider, including networks and joint ventures.
N	SERVICE NOT AVAILABLE either by the hospital or through a formal contractual arrangement with another hospital or provider.

Number Codes replaced with Letters. O/B eliminated.

Code	Description
1	Service is provided in or by the hospital in a DISTINCT AND SEPARATE UNIT. The number of beds and utilization information MUST be provided for inpatient units.
2	Service is provided in or by the hospital but NOT IN A DISTINCT AND SEPARATE UNIT.
3	Service is provided by the hospitals Health Care System.
4	Service IS NOT MAINTAINED by the hospital but is available, in the hospital or another facility, through a FORMAL CONTRACTUAL arrangement with another hospital or provider, including networks and joint ventures.
5	SERVICE NOT AVAILABLE either by the hospital or through a formal contractual arrangement with another hospital or provider.

Code	Description
O	Service is provided by the hospital IN BUILDINGS OTHER THAN THE MAIN HOSPITAL BUILDING and is billed under the hospital's Medicare provider number.
B	Service is provided by the hospital IN BOTH THE MAIN HOSPITAL BUILDING AND IN BUILDINGS OTHER THAN THE MAIN HOSPITAL BUILDING (which is billed under the hospital's Medicare provider number).

WHAIC/AHA Survey Compare Recap

Compared AHA WI addendum to Annual and Personnel survey.

§ Advocating for our WI hospitals to reduce redundancy of questions on the AHA WI Addendum and also the number of surveys.

§ As AHA updates their surveys, we will try to update our surveys.

§ **If you notice duplicate questions, redundancies, or questions that no longer pertain to today's environment or have other suggestions, please email us.**

Survey Submission

3-Digit Facility ID

3-Digit Facility ID

The unique 3-digit identification number assigned to each facility by WHAIC.

You will notice this ID in the Select Facility drop-down.

Please include this number in the subject line when contacting WHAIC.

Select Facility: | 000 - WHA Test Hospital

000 - WHA Test Hospital

001 - Amery Regional Medical Center

002 - Aspirus Langlade Hospital

003 - ThedaCare Regional Medical Center - Appleton, Inc.

004 - Ascension NE Wisconsin - St. Elizabeth Campus

006 - Memorial Medical Center

007 - Western Wisconsin Health

000 - WHA Test Ho
Hospital Surveys:

Survey Name
2024 ANNUAL SUF
2024 FISCAL SURV

Health System Survey

Health System Survey Expectations

❑ Health System Surveys (HSS) are entered under a 900 series system name, not by facility.

❑ If the HSS is not received timely, an email is sent to all primary and HSS contacts.

❑ Those responsible for the HSS must have their own current portal account. If you need access and do not have it, contact us.

❑ The HSS is part of the other surveys on the survey calendar and due at the same time.

Select Facility: 904 - Bellin Health System ▲   Year: 2024 ▼

- 903 - Advocate Aurora Health
- **904 - Bellin Health System**
- 905 - Beloit Health System (System)
- 906 - Children's Wisconsin
- 908 - Froedtert Health
- 909 - Gundersen Health System
- 910 - HSHS Wisconsin Division

Hospital Surv

904 - Bellin Health

Survey Name		v Survey	Status
2024 HEALTHCAR		nue	Open

WHA | INFORMATION CENTER

NEW Survey Application

Survey Submission Home Page

WHA | INFORMATION CENTER

Survey

| Home | User Links ▾ | Survey Manuals ▾ | Data Detail ▾ | Data Deliverables ▾ |

Select Facility: [000 - WHA Test Hospital ▾] Year: [2024 ▾] [Extensions]

Hospital Surveys:

000 - WHA Test Hospital -- (Fitchburg), FY End: 12/31

Survey Name	Enter/View Survey	Status	Print PDF	Progress	Action Needed
2024 ANNUAL SURVEY	Incomplete	Open	🖨	100%	⚠ Hard Edits
2024 FISCAL SURVEY	Continue	Open	🖨	15%	
2024 MEDICARE COST REPORT SURVEY	Continue	Open	🖨	11%	
2024 UNCOMPENSATED HEALTH CARE PLAN	Submit Survey	Open	🖨	100%	

Authorized Users for Selected Hospital:

Please take a moment to review your hospital's list of users authorized to access the WHAIC secure Survey Site. Should any of the names listed no longer require access to the Survey or if changes need to be made, please contact whainfocenter@wha.org, as it is the hospital's responsibility to notify WHAIC with any staff updates or corrections.

First Name	Last Name	Title	Email	Survey Role
Justin	Flory	Health Care Data Programmer	jflory@wha.org	IC Primary User
Heather	Scambler	Program Specialist	hscambler@wha.org	IC Primary User
Cindy	Case	Director of Data Management and Integrity	ccase@wha.org	IC Primary User

WHA | INFORMATION CENTER

Filing an Extension

WHA | INFORMATION CENTER

Survey

Home   User Links ▾   Data Detail ▾   Data Deliverables ▾

Select Facility: | 000 - WHA Test Hospital ▾ | Year: | 2024 ▾ | **Extensions**

000 - WHA Test Hospital -- (Fitchburg), FY End: 12/31
Hospital Surveys:

Survey Name	Enter/View Survey	Status	Print PDF	Progress	Action Needed
2024 ANNUAL SURVEY	Continue	Open	🖨	15%	
2024 FISCAL SURVEY	New	Open	🖨	0%	
2024 MEDICARE COST REPORT SURVEY	New	Open	🖨	0%	
▓▓▓▓▓▓	▓▓▓▓	▓▓▓	🖨	0%	
2024 UNCOMPENSATED HEALTH CARE PLAN	New	Open	🖨	0%	

Authorized Users for Selected Hospital:
Please take a moment to review your hospital's list of users authorized to access the WHAIC secure Survey Site. Should any of the names listed no longer require access to the Survey or if changes need to be made, please contact whainfocenter@wha.org, as it is the hospital's responsibility to notify WHAIC with any staff updates or corrections.

First Name	Last Name	Title	Email	Survey Role
Justin	Flory	Health Care Data Programmer	jflory@wha.org	IC Primary User

WHA | INFORMATION CENTER

Filing an Extension

Select Facility: 003 - ThedaCare Regional Medical Center - Appleton, Inc. ▼   Year: 2023 ▼   **Back to Survey Submission**

Survey Extension Requests:

Any facility that anticipates delays in submitting hospital survey data within the standard submission deadline must file an extension request through the survey submission application. WHAIC has implemented an online extension request process that will replace the paper format. An extension of up to 30 days past the submission deadline may be granted under limited circumstances.

As a reminder, extension requests should not be a routine function of the survey submission process; the state statute has specific language that applies to extension requests. WHAIC will monitor reasons for extensions carefully.

To request an extension, click on the icon under the "request extension" column. You will then be prompted to select a reason for the request, and add any additional comments. Your request will then be sent to WHAIC for approval. You will receive an email notification once your request has been granted.

003 - ThedaCare Regional Medical Center-Appleton -- (Appleton), FY End: 12/31
Hospital Surveys:

Survey Name	Request Extension	Status	Progress
2023 ANNUAL SURVEY	Request	Open	100%
2023 FISCAL SURVEY	Request	Open	100%
2023 MEDICARE COST REPORT SURVEY	Request	Open	100%
▮▮▮▮▮	Request	Open	100%
2023 UNCOMPENSATED HEALTH CARE PLAN	Request	Open	100%

Specify Reason for Extension

Extension Reason: Hospital/Surgery Center Strike ▼

If other, please explain: [   ]

Cancel   **Save Choice**

Request Extension

Requested

Requested

Requested

Requested

Requested

WHA | INFORMATION CENTER

Sections and Questions

Back to Facility Select

Section	
I. HOSPITAL INFORMATION AND CLASSIFICATION (86%)	⌄
II. SELECTED INPATIENT UNITS (100%)	⌃
General Medical / Surgical / ICU [28 - 55] (100%)	
III. SELECTED ANCILLARY AND OTHER SERVICES (99%)	⌄
IV. SELECTED SERVICE UTILIZATION (100%)	⌄
V. TOTAL FACILITY UTILIZATION AND BEDS (0%)	⌄
VI. MEDICAL STAFF (0%)	⌄
VII. PERSONNEL ON HOSPITAL PAYROLL (0%)	⌄
VIII. COMMUNITY BENEFITS AND POPULATION HEALTH (0%)	⌄
IX. SERVICE QUALITY/ PATIENT SAFETY (0%)	⌄
X. INFORMATION TECHNOLOGY AND CYBERSECURITY (0%)	⌄

II. SELECTED INPATIENT UNITS
General Medical / Surgical / ICU

ℹ️ 💾

Instructions and Guidelines:

If information for a category is zero, fill in 0. If information for a category is Not Applicable, fill in 0. Do NOT use spaces, dashes, NA, N/AV, or M.

Account for all adult and pediatric inpatient beds set-up-and-staffed on the last day of the fiscal year (*excluding weekends or holidays*). Do not include "normal newborn" bassinets. List beds for a line only if a unit is specifically designated for the service area. The number of discharges should include deaths and unit transfers. For each service listed, (see codes H,S,C,N below) indicate number in text box and click on button to left of code that best describes the status of the service as of the last day of the fiscal year.

For each service, click on the button to the left of the code number that best describes the status of the service as of the last day of the fiscal year, except weekends and holidays.

Code	Description
H	Service is provided in or by the hospital. The number of beds and utilization information MUST be provided for inpatient units.
S	Service is provided by the hospitals Health Care System in the community.
C	Service IS NOT MAINTAINED by the hospital but is available, in the hospital or another facility, through a FORMAL CONTRACTUAL arrangement with another hospital or provider, including networks and joint ventures.
N	SERVICE NOT AVAILABLE either by the hospital or through a formal contractual arrangement with another hospital or provider.

NOTE: WHAIC is interested in whether or not the service is offered.

28. Acute Long–Term Care (Hospital Only)

Beds set-up and staffed last day of fiscal year	Number of discharges	Inpatient days for fiscal year	Discharge days	(Use codes listed above)
444	444	444	444	⦿ ○ ○ ○ H S C N

29. Adult Medical / Surgical, Acute (include gynecology)

Beds set-up and staffed last day of fiscal year	Number of discharges	Inpatient days for fiscal year	Discharge days	(Use codes listed above)
444	444	444	444	⦿ ○ ○ ○ H S C N

WHA | INFORMATION CENTER

Pre-Filled Report

- The purpose is to view which fields are already completed on the survey.

Layout of Survey Questions

I. HOSPITAL INFORMATION AND CLASSIFICATION (39%)

Organization Information
[1 - 10] (38%)

Service
[11 - 12] (50%)

Certification Status
[13 - 15] (100%)

Managed Care Information
[16 - 22] (20%)

Nursing Home Data
[23 - 27] (0%)

II. SELECTED INPATIENT UNITS (15%)

III. SELECTED ANCILLARY AND OTHER SERVICES (84%)

IV. SELECTED SERVICE UTILIZATION (0%)

V. TOTAL FACILITY UTILIZATION AND BEDS (0%)

VI. MEDICAL STAFF (0%)

VII. PERSONNEL ON HOSPITAL PAYROLL (0%)

VIII. COMMUNITY BENEFITS AND POPULATION HEALTH (100%)

IX. SERVICE QUALITY/ PATIENT SAFETY (0%)

X. INFORMATION TECHNOLOGY AND CYBERSECURITY (0%)

Survey Layout:
- Navigational Tree Control
- Percentage of each section completed
- Percentage of each subsection of questions completed

Survey Questions

- Each question shows additional details by clicking on the line number.

Survey Auto-Save

- <mark>NEW</mark>: Auto-save functionality.
- Do recommend manually Saving before moving to the next page as this will trigger the validation edits.

Survey Validation Edits

Hard Edit – Mathematical or logical error: Edit that must be fixed to submit survey (e.g., fiscal survey line 1 + line 4 must equal line 5).

Soft Edit – Possible error; values imply an unusual situation: Edit that must be verified to submit survey. (e.g., annual survey – line 160 – Admissions are more than 3% higher/lower than inpatient days in Section III. Are you sure?).

Stats (Statistical) Edits – Possible error; values are substantially different than reported in the previous survey. Edits run after hard and soft edits are addressed. If value is 30% more or less than submitted in the previous year, an edit will appear. (e.g., if total gross revenue is $1.0 million for FY 2022 and $1.3 million for FY 2023, an edit will appear).

Red = Hard Edit

Gold = Soft Edit

Purple = Stat Edit

Survey Validation Edits

Hospital Surveys:

133 - Door County Medical Center -- (Sturgeon Bay), FY End: 12/31

Survey Name	Enter/View Survey	Status	Print PDF	Progress	Action Needed
2024 ANNUAL SURVEY	Continue	Open	🖶	77%	
2024 FISCAL SURVEY	Incomplete	Open	🖶	100%	⚠ Hard Edits
2024 MEDICARE COST REPORT SURVEY	Submit Survey	Open	🖶	100%	
2024 UNCOMPENSATED HEALTH CARE PLAN	Submit Survey	Open	🖶	100%	

II. DETAIL OF PATIENT SERVICE REVENUE (100%)

Gross Patient Service Revenue and Its Sources
[33 - 36] (100%)

Public Sources
[37 - 42] (100%)

Commercial Sources
[43 - 49] (100%)

49. TOTAL GROSS revenue from service to patients, by source (Add lines 37-48. Should equal dollar value on line 36)

Total $ — *Line 36 != Line 49 TOT*
224,694,440

Inpatient $
25,592,167

Outpatient $
199,102,273

- Edits can be viewed in the Action Needed column-click Hard Edits.
- The Section, Collection and Question number will turn Red.
- Hover over the red question to view the Edit.

WHA | INFORMATION CENTER

Survey Validation Edits

Submitting the Survey

Survey Name	Enter/View Survey	Status	Print PDF	Progress	Action Needed
2024 ANNUAL SURVEY	Continue	Open	🖨	77%	
2024 FISCAL SURVEY	Incomplete	Open	🖨	100%	⚠ Hard Edits
2024 MEDICARE COST REPORT SURVEY	Submit Survey	Open	🖨	100%	
2024 UNCOMPENSATED HEALTH CARE PLAN	Submit Survey	Open	🖨	100%	

Survey Name	Enter/View Survey	Status	Print PDF	Progress	Action Needed
2023 ANNUAL SURVEY	View Only	Closed	🖨	100%	✔ Survey Submitted
2023 FISCAL SURVEY	View Only	Closed	🖨	100%	✔ Survey Submitted
2023 MEDICARE COST REPORT SURVEY	Submit Survey	Open	🖨	100%	

Completed Submissions:

✓ Progress is 100%

✓ All surveys have a checkmark and say Survey Submitted.

WHA | INFORMATION CENTER

Final Steps of Submission Process

Step 1
- Final review of data
- Action edits explained/corrected

Step 2
- Affirmations submitted

Step 3
- Schedule C uploaded

WHA | INFORMATION CENTER

Survey Affirmations and Schedule C

- **Action** has 3 possible values:
  - **Complete Affirmation** means that all required surveys have been submitted. Click the link to open the Affirmation for submission.
  - **Surveys Incomplete** means that not all required surveys have been submitted. Nothing can be done with this facility except uploading the Schedule C.
  - **Download** means the Affirmation has already been submitted. The Affirmation can be downloaded but no further changes can be made.
- **Schedule C** has the values:
  - **Upload** - prompts the user to upload the Schedule C. Upload may be visible even after a file has been uploaded. It will be available, and changes can be made until the Affirmation has been submitted. After that point, it is considered locked.
  - **Download** – the Schedule C is available to be viewed because it has been uploaded.
  - **Delete** – the Schedule C can be deleted and a new one can be uploaded.
- **Year** – defaults to the current year but can be changed to view Affirmations and Schedule C's from previous years.

| | Home | User Links ▾ | Survey Manuals ▾ | Data Detail ▾ | Data Deliverables ▾ |

Affirmation and Schedule C Upload

Affirmation List

Search: [ ]

Facility ID ▲	Facility Name	Year	FYE	Submitted	Approved By	Action	Schedule C	Validated
000	WHA Test Hospital	2024				Surveys Incomplete	Download Delete	☐
133	Door County Medical Center	2024				Complete Affirmation	Upload	☐

WHA | INFORMATION CENTER

Affirmation Process

Affirmation Summary Data

- Affirmation Summary Data
- FY Summary Report
- Action Edits
- Sign & Submit Affirmation
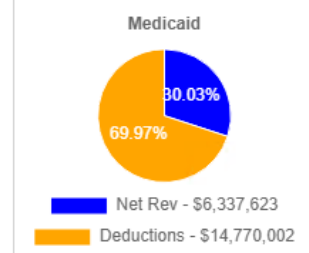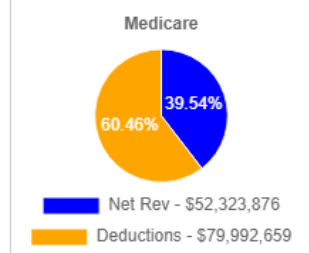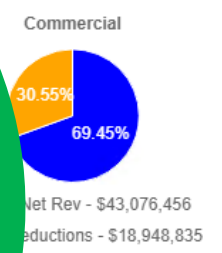- Reopen Surveys

2024 Survey Affirmation

███████ Medical Center (████████)

According to the Department of Health Services (DHS) 120.11, hospitals must adhere to standard data verification, review, and comment procedures. This must occur **before** the data is signed off on via the affirmation statement.

Portions of the Annual and/or Fiscal survey data is publicly available on the WHAIC website in various publications, custom reports, and PricePoint to display Payer Mix details for various payers as well as Charity/Other Uncompensated care. For more information and validation of this data, see the Preliminary Fiscal Year Summary Report on the left toolboar.

Review the Summary Data in the charts and table below for accuracy. Line items listed in red indicate a significant variation of 30% or greater from the previous years reporting. * *Review these changes carefully as they are often the focus of public interest. If changes are required for the current year, use the toolbar on the left to reopen the appropriate survey and make the necessary corrections. If no corrections to the figures w are required, but you choose to provide a comment, you may do so prior to submitting your electronic affirmation.*

Commercial
- 30.55%
- 69.45%
- Net Rev - $43,076,456
- Deductions - $18,948,835

Medicare
- 39.54%
- 60.46%
- Net Rev - $52,323,876
- Deductions - $79,992,659

Medicaid
- 30.03%
- 69.97%
- Net Rev - $6,337,623
- Deductions - $14,770,002

	Current Year	Previous Year	% Change
...nt Revenue	$224,694,440	$224,694,440	.0%
...eductions	$121,718,907	$121,718,907	.0%
...et Patient Revenue	$102,975,533	$102,975,533	.0%
Plus Other Operating Revenue	$3,357,935	$3,357,935	.0%
Total Revenue	$3,357,935	$106,333,468	-96.8%
Less Expenses	$105,463,339	$105,463,339	.0%
Operating Margin	($102,105,404)	$870,129	-11834.5%
Operating Margin %	-3040.7%	.8%	-371688.9%

	Current Year	Previous Year	% Change
Bad Debt	$1,294,647	$1,294,647	.0%
Charity Care	$2,101,235	$2,101,235	.0%
Inpatient Discharges	1,099	1,099	.0%
Total Outpatient Visits	194,666	194,666	.0%
Total FTEs	689.6	596.8	15.6%
Total Beds	25	25	.0%

Start on Affirmation Survey Data. The area will turn green when on the active page.

Next

WHA | INFORMATION CENTER

Affirmation Process

Affirmation Process

❖ Action edits must have an explanation provided for the edit. If the edit brings attention to an error, surveys should be reopened and corrected before signing off on the data.

❖ If No Action Edits were found, submit the survey.

Affirmation Summary Data

FY Summary Report

Action Edits

Sign & Submit Affirmation

Reopen Surveys

2024 Survey Affirmation

No Action Edits were found. You may submit the affirmation.

Reopening of Surveys

❖ Surveys can be reopened in two ways:
  ❖ from the Reopen page of the Affirmation or
  ❖ once the surveys and/or the Affirmation is submitted, surveys must be **reopened by the WHAIC staff** and the Affirmation will need to be resubmitted after going through the Edits again.

Affirmation Process

2024 Survey Affirmation

█████████████ **Medical Center (**███████**)**

The electronic signature on this affidavit affirms that the chief executive officer, administrator, or designee have reviewed the following data as presented from the surveys submitted by D█████████████████

- Affirmation Summary Data
- FY Summary Report
- Any Applicable Action Edits

This is a legally binding equivalent of the individual's handwritten signature as per DHS 120.12.

I HEREBY ATTEST, that I or my designated representative, to the best of my knowledge, reviewed and verified internally the data that was submitted to WHA Information Center and the data is accurate.

Provide e-signature for the Electronic Survey Affirmation Statement

Name of person submitting the █

Provide additional comments as █

Navigation panel:
- Affirmation Summary Data
- FY Summary Report
- Action Edits
- Sign & Submit Affirmation
- Reopen Surveys

- ✓ The electronic signature is provided by the CEO, administrator, or designee.
- ✓ The electronic signature attests that the data has been reviewed and verified internally by the hospital.
- ✓ The signee may designate someone to electronically sign on their behalf.
- ✓ The name of the person submitting the document can be different and will populate based on portal login credentials.
- ✓ Additional comments can be provided to explain variances not included on the Action Edits page.

WHA INFORMATION CENTER

Affirmation Process

Affirmation Summary Data

FY Summary Report

Action Edits

Sign & Submit Affirmation

Reopen Surveys

2024 Survey Affirmation   ████████████ **Medical Center** ████████████

The electronic signature on this affidavit affirms that the chief executive officer, administrator, or designee have reviewed the following data as presented from the surveys submitted by ███████████████████

- Affirmation Summary Data
- FY Summary Report
- Any Applicable Action Edits

This is a legally binding equivalent of the individual's handwritten signature as per DHS 120.12.

I HEREBY ATTEST, that I or my designated representative, to the best of my knowledge, reviewed and verified internally the data that was submitted to WHA Information Center and the data is accurate.

Provide e-signature for the Electronic Survey Affirmation Statement

[   ]

Name of person submitting the Electronic Survey Affirmation Statement

[   ]

Provide additional comments as needed:

[   ]

Download Affirmation Statement Printable PDF   [Submit Affirmation]

WHA | INFORMATION CENTER

Example of Schedule/Worksheet C

	Provider CCN: 52-1350	Period: From 07/01/2021 To 06/30/2022	Worksheet C Part I Date/Time Prepared: 12/13/2022 6:03 pm
	Title XVIII Charges	Hospital	Cost

		Cost Center Description	Charges					
			Inpatient	Outpatient	Total (col. 6 + col. 7)	Cost or Other Ratio	TEFRA Inpatient Ratio	
			6.00	7.00	8.00	9.00	10.00	
		INPATIENT ROUTINE SERVICE COST CENTERS						
30.00	03000	ADULTS & PEDIATRICS	5,082,688		5,082,688			30.00
31.00	03100	INTENSIVE CARE UNIT	0		0			31.00
32.00	03200	CORONARY CARE UNIT	0		0			32.00
33.00	03300	BURN INTENSIVE CARE UNIT	0		0			33.00
34.00	03400	SURGICAL INTENSIVE CARE UNIT	0		0			34.00
40.00	04000	SUBPROVIDER - IPF	4,272,069		4,272,069			40.00
41.00	04100	SUBPROVIDER - IRF	0		0			41.00
42.00	04200	SUBPROVIDER	0		0			42.00
43.00	04300	NURSERY	227,043		227,043			43.00
44.00	04400	SKILLED NURSING FACILITY	0		0			44.00
45.00	04500	NURSING FACILITY	0		0			45.00
46.00	04600	OTHER LONG TERM CARE	0		0			46.00
		ANCILLARY SERVICE COST CENTERS						
50.00	05000	OPERATING ROOM	1,572,444	7,939,213	9,511,657	0.377596	0.000000	50.00
51.00	05100	RECOVERY ROOM	0	0	0	0.000000	0.000000	51.00
52.00	05200	DELIVERY ROOM & LABOR ROOM	514,268	90,460	604,728	0.223259	0.000000	52.00
53.00	05300	ANESTHESIOLOGY	192,366	669,939	862,305	0.052221	0.000000	53.00
111.00	11100	ISLET ACQUISITION	0	0	0			111.00
113.00	11300	INTEREST EXPENSE						113.00
114.00	11400	UTILIZATION REVIEW-SNF						114.00
115.00	11500	AMBULATORY SURGICAL CENTER (D.P.)	0	0	0			115.00
116.00	11600	HOSPICE	0	0	0			116.00
200.00		Subtotal (see instructions)	19,030,522	76,394,272	95,424,794			200.00
201.00		Less Observation Beds						201.00
202.00		Total (see instructions)	19,030,522	76,394,272	95,424,794			202.00

Any Questions?

Thank You!

You can find more information online at:

www.whainfocenter.com   whainfocenter@wha.org   hscambler@wha.org