

Best Practices for Successful Uploads

Data Entry

- Enter all required data in a timely fashion to ensure successful uploads.

Responsible Parties

- Assign all appropriate responsible parties.
 - In the certification kit, Responsible Parties section, click the Edit button to add/remove responsible parties.

Responsible Parties

GREENE, GREGORY; WOODLAND, CHERYL

Edit...

Name	Email Address	SA/RO	Primary
GREENE, GREGORY		RO	<input checked="" type="checkbox"/>
WOODLAND, CHERYL	CW@YAHOO.COM	SA	<input checked="" type="checkbox"/>

R.O. =

+ Add S.A.

+ Add R.O.

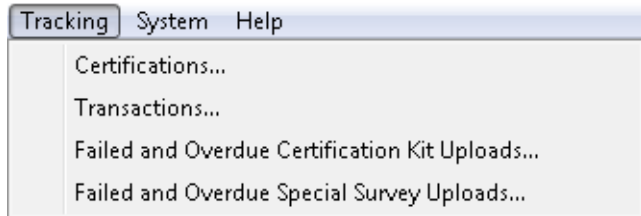
- Delete

OK

- Ensure personnel records have up-to-date email addresses (ACO<Enter/Update Surveyor Information<Employee Identification tab).
 - In example above, Gregory Greene is missing the email address

Reports

- Check the Failed and Overdue Certification Kit Uploads report.



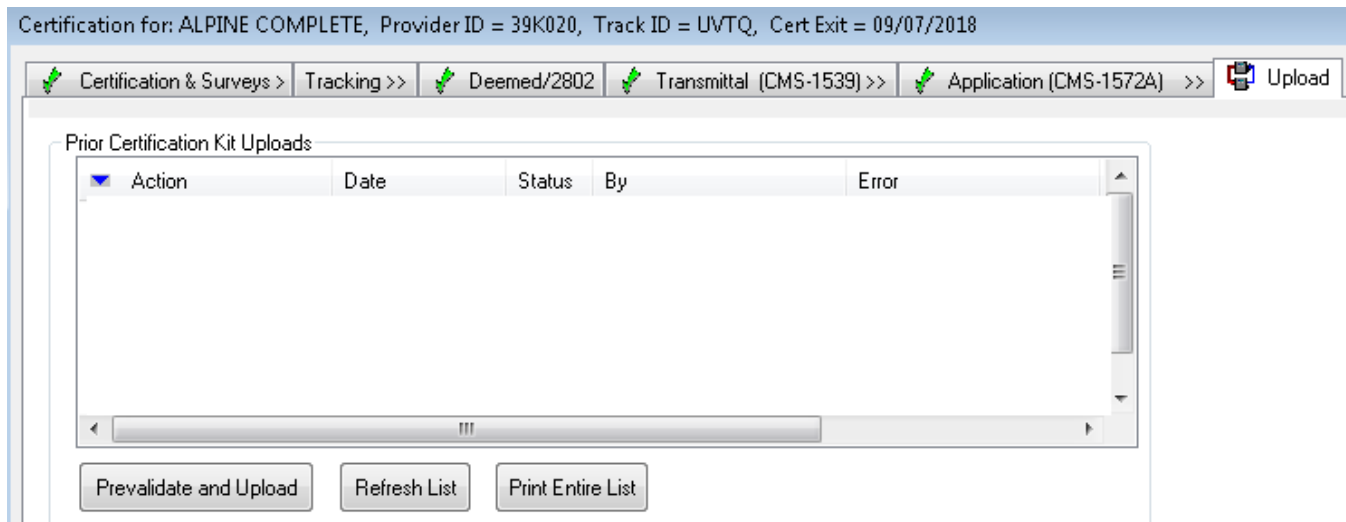
- Regularly run upload monitoring reports, i.e., Certification Kit List, Transactions Tracking, and Investigations Lacking Survey Upload.

Emails

- Review tardiness emails and take appropriate action.

Manual Uploads

- If in doubt about whether an upload of any type will be successful, test it by triggering a manual upload.
 - To manually upload, on the Upload tab, select Prevalidate and Upload.
- Uploads display in the Prior Certification Kit Uploads section.



- Highlight unsuccessful uploads to see the associated Upload Transaction Errors below.
In this case, the CMS-2567 Admin Signoff Date is missing.

Certification & Surveys > Tracking >> Deemed/2802 Transmittal (CMS-1539) >> Application (CMS-1572A) >> Upload

Prior Certification Kit Uploads

Action	Date	Status	By	Error	Tr
04 UPDATE	10/04/2018 02...	00 - ...	CHERYL, WOODLAND (...)		39
04 UPDATE	10/04/2018 02...	-1 - F...	CHERYL, WOODLAND (...)	20 - transaction edit error.	39
04 UPDATE	10/04/2018 02...	-1 - F...	CHERYL, WOODLAND (...)	20 - transaction edit error.	39
03 ADD	09/28/2018 10...	10 - ...	CHERYL, WOODLAND (...)		39

Prevalidate and Upload Refresh List Print Entire List

Upload Transaction Errors

0257-2567: CMS-2567.ADM SIGNOFF DATE (X6) IS REQUIRED WHEN DEFICIENCIES ARE PRESENT ON THE HEA