



Patient Centered Medical Home (PCMH) InfoTurn Technical Transmission Instructions

Press Ganey's InfoTurn® System

Using Press Ganey's InfoTurn System is a requirement for the voluntary PCMH program developed by NCQA. To use InfoTurn, you send us a data file that contains your patients' information. We refer to the data file as your upload. Each data file includes multiple records. Each record, which represents one patient, is comprised of many fields. Each field carries a different piece of information (e.g., ZIP code). **The upload needs to be received within 1 month of the end of the measurement period.** For example, if the measurement period is November 1, 2016 through April 30, 2017 then the file must be received by May 31, 2017.

For each practice, patients should only be in the file once regardless of the number of visits they had in the measurement period. Their administrative information will be based on their most recent visit, while the Lookback Visit Count will reflect the number of visits they had in the 6 month measurement period.

All records must be uploaded using the following file naming convention: PCMH_CLIENT ID_SAMPLE MEASUREMENT START_SAMPLE MEASUREMENT END.csv. For example PCMH_12345_110116_043017.csv; where 12345 is the Client ID, 110116 is the Sample Measurement Start of November 1, 2016, and 043017 is the Sample Measurement End of April 30, 2017. Please note that due to the unique method of processing PCMH records, they must be sent separate from any other service in which Press Ganey is administering for your facility.

To be eligible for the PCMH survey, the patient must have had at least one visit (scheduled or walk-in) during the measurement period with a defined clinician. **Deceased patients must be excluded.**

Only clinicians who can be selected by a patient/family as a personal clinician are eligible for inclusion. Eligible clinicians include physicians, nurse practitioners and physician assistants who practice in the specialty of internal medicine, family medicine or pediatrics and serve as the personal, primary care clinician for their patients. Clinicians must have an active, unrestricted license as a doctor of medicine, doctor of osteopathy, nurse practitioner or physician assistant. All eligible clinicians practicing together at a practice site must be included when identifying the CAHPS PCMH Survey eligible population.

Note: Specialists, nurse practitioners and physician assistants who do not have their own panel of patients or who do not practice in primary care are not typically eligible.

Required/Recommended Data Fields

Below are the required and recommended (highlighted) fields. All the fields below are required unless highlighted.



Field Name	Description
Survey Designator	Alphanumeric code indicates survey type. Assigned to you by Press Ganey
Client Number	Client identification number assigned to you by Press Ganey
Practice Name	
First Name	Patient's first name
Middle Initial	Patient's middle initial
Last Name	Patient's last name
Gender	Patient's gender
Date of Birth	Patient's date of birth (mmddyyyy)
Address 1	Address survey should be mailed to. Abbreviations may be rejected
Address 2	Apartment, Suite, etc.
City	City spelled out. Abbreviations may be rejected
State	Standard U.S.P.S. two-letter state abbreviation
ZIP Code	Five digits. Additional four-digit extension is acceptable
Phone	Patient's phone number including the three digit area code
Email	Patient's email address
Clinician First Name	Name of the clinician who provided care at the patient's most recent visit during the measurement period.
Clinician Middle Initial	
Clinician Last Name	
Clinician Credentials/Provider	For example: MD, PA, RN, etc.
Clinician NPI	National Provider Identifier
Date of Visit	Date of most recent visit during the measurement period. (mmddyyyy)
Parent/Caretaker First Name	
Parent/Caretaker Middle Initial	
Parent/Caretaker Last Name	
Unique Patient ID	Unique patient identifier (account number, visit number, billing number, etc.)
Lookback Visit Count	Total number of visits for the patient over the entire measurement period.
Language	Customer's primary language (0=English; 1=Spanish)
Medical Record Number	Patient's medical record number
Specialty	Physician's board certified specialty (see table below for values)
Payor	Insurance
Clinic ID	Site code or internal site number
E.O.R. Indicator	End-of-record marker (i.e., \$)

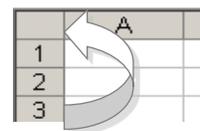
PCMH Physician Specialty Codes

001 = Allergy/Immunology	015 = Geriatrics	028 = Psychiatry
002 = Anesthesiology	016 = Hematology/Oncology	029 = Public Health & Rehabilitation
003 = Cardiology	017 = Internal Medicine	030 = Pulmonary Medicine
004 = Child & Adolescent Psychiatry	018 = Medical Genetics	031 = Radiology
005 = Dermatology	019 = Nephrology	032 = Rheumatology
006 = Diagnostic Radiology	020 = Neurology	033 = Surgery
007 = Emergency Medicine	021 = Nuclear Medicine	034 = Urology
008 = Endocrinology/ Metabolism	022 = OB/GYN or GYN	035 = Vascular Medicine
009 = Family Practice/Family	023 = Ophthalmology	036 = Internal Medicine Pediatrics
010 = Forensic Pathology	024 = Orthopedics	998 = Other
011 = Gastroenterology	025 = Pathology	999 = Missing
012 = General Practice	026 = Pediatrics	
013 = General Preventive Medicine	027 = Physical Medicine & Rehabilitation	
014 = General Surgery		

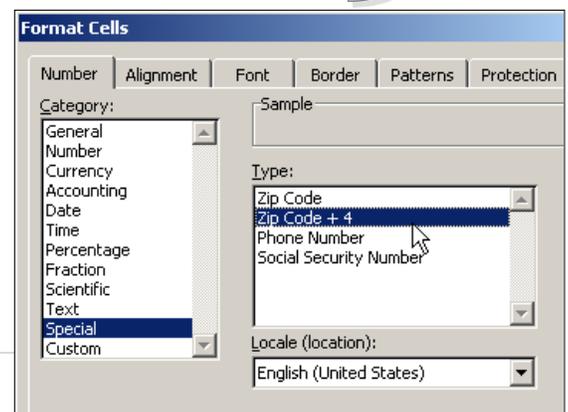
Excel CSV Format

The upload needs to be received within 1 month of the end of the measurement period. Data files should be saved in a comma delimited format. If using Microsoft Excel, save as a .CSV file prior to transmitting. Records saved in CSV format can be viewed in text editors separated by commas. These instructions walk you through the process of creating an Excel CSV file. Note: Menu options may vary depending on your version of Microsoft Office, and Microsoft Excel XLS, Microsoft Word, and Microsoft Access documents are not permitted.

1. Open a new Excel spreadsheet. Click the empty cell above row heading "1" and left of column heading "A." This highlights the entire spreadsheet.
Tip: You may also select the entire spreadsheet by pressing [CTRL + A](#).

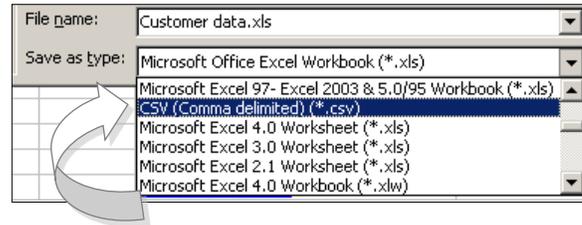


2. From the main menu, select [FORMAT > CELLS > NUMBER > TEXT](#) and click **OK**. This formats all cells in the spreadsheet as "Text."
3. To populate your spreadsheet with your customer data, use the main menu to select [DATA > IMPORT EXTERNAL DATA > IMPORT DATA](#). Select your source data and follow the prompts to import your text file.





4. Format the ZIP Code field as “ZIP Code.” To do this, highlight the ZIP Code column and select **FORMAT > CELLS > NUMBER > SPECIAL > ZIP CODE** or **ZIP CODE + 4**. This prevents Excel from truncating leading zeros at the beginning of the ZIP Codes.



5. Save your file after import by selecting **FILE > SAVE AS**. Choose “CSV (Comma delimited) (*.csv)” under “Save as type.” This will automatically save your data as a comma-delimited file.

IMPORTANT

We strongly recommend that you use File Transfer Protocol (FTP) when sending your live data file. FTP is the simplest and most secure method of uploading. If you are interested in this data transmission method, please notify your Press Ganey account manager.

IP Address

The IP address for FTP.pressganey.com is 204.13.92.99

Methods of Transmission

Press Ganey can accept files transmitted in one of four ways, which are described in detail below:

Recommended

1. SFTP (SSH File Transfer Protocol Secure)

- a. by using SFTP, you ensure that both your login credentials and the files you send are encrypted during transmission.

2. FTPS (File Transfer Protocol Secure, FTP over SSL)

- a. by using FTPS, you ensure that both your login credentials and the files you send are encrypted. Press Ganey prefers SFTP because it’s typically easier to implement.

Not Recommended

1. InfoTransfer v2

- a. InfoTransfer uses OpenPGP encryption to encrypt your data files, but connects to Press Ganey using FTP, which could expose your credentials in clear text.

2. FTP (File Transfer Protocol) with PGP/GnuPG file Encryption

- a. FTP is a clear text protocol, meaning that you’ll need to encrypt files using PGP before transmitting via FTP. Even after the file is encrypted, your login credentials for Press Ganey’s FTP server could be exposed to other people on your network or on the Internet.



Resources <https://www.google.com/search?q=sftp+vs.+ftps>

General FTP Information

- Data uploaded to the InfoTurn server is automatically imported into the system. The next production run processed by InfoTurn will include the data.
- Do not ZIP files.
- All files must be uploaded in BINARY MODE.
- FTP site = <ftp.pressganey.com>
- The IP address for <FTP.pressganey.com> is 204.13.92.99
- Please email your Account Manager after the test file has been transmitted. Be sure to include your client ID number, the file name you just sent, and a file layout that describes the content and order of the fields in your file.
- Live FTP logins and passwords are issued once the test file and surveys are approved for mailing.
- We do not provide support for automating the transfer process. Please contact your software vendor for assistance.

Method 1 (Highly Recommended): SFTP (SSH File Transfer Protocol Secure)

SFTP is the recommended method of transmission. SFTP uses the SSH (Secure Shell) protocol to encrypt the data connection rather than the data file itself.

How to Upload

You will need FTP client software in order to transmit data via SFTP. There are many software solutions available for SFTP such as FileZilla, WS-FTP, WinSCP and CoreFTP. Please note that Press Ganey does not own any of these software solutions and therefore cannot support your facility in using these tools.

If you are looking for an SFTP client, WS-FTP, FileZilla, or any FTP client software supporting SSH is acceptable.

Test Account Login

Login ID = 000000000000@ssh (12 zeros@ssh)

Password = 000000 (6 zeros)

SFTP Advantages	SFTP Disadvantages
<ul style="list-style-type: none"> ▪ Extremely secure using the Secure Shell protocol. ▪ Allows high upload frequency. ▪ Can be automated. ▪ Quick data turnaround. ▪ Automated notification of success or failure. ▪ Files can be uploaded 24 hours a day, seven days a week. 	<ul style="list-style-type: none"> ▪ Access to communicate with ftp.pressganey.com on port 22 must be enabled through your firewall. ▪ Requires software that supports the SFTP protocol, such as WS-FTP or FileZilla



Method 2 (Recommended): FTPS (File Transfer Protocol Secure, FTP over SSL)

FTPS uses the SSL (Secure Sockets Layer) protocol to encrypt the data connection rather than the data file itself.

How to Upload

You will need FTP client software in order to transmit data via FTPS. There are many software solutions available for FTPS such as FileZilla, WS-FTP, WinSCP and CoreFTP. Any FTP client software supporting 2048 bit SSL is acceptable.

Files may be encrypted with the Press Ganey Associates, Inc PGP/GNUPG public key. However, this is not required when using 2048bit SSL.

Test Account Login

Login ID = 000000000000@sftp (12 zeros@sftp)

Password = 000000 (6 zeros)

FTPS Advantages	FTPS Disadvantages
<ul style="list-style-type: none">Extremely secure using 2048 bit SSL encryption.Allows high upload frequency.Can be automated.Quick data turnaround.Automated notification of success or failure via email.Files can be uploaded 24 hours a day, seven days a week.	<ul style="list-style-type: none">Requires software that supports the 2048 bit SSL protocol, such as WS-FTP or FileZilla.Access to communicate with ftp.pressganey.com on ports 21, 59000, and 59001 must be enabled through your firewall, both inbound and outbound

Method 3 (Not Recommended): InfoTransfer v2

For those transmitting files via FTP, InfoTransfer v2 is a simple method for secure uploading. This free software tool, developed at Press Ganey, will use GnuPG to encrypt your data and FTP it directly to our server.

Follow the step outlined in the link below to set up InfoTransfer. Please note that it requires the .NET 3.5 SP1 framework or higher to be installed on your PC.

The InfoTransfer v2 utility and instructions can be downloaded here:
<http://helpandtraining.pressganey.com/uploadHelp/downloads/Utilities.aspx>



FTP with InfoTransfer v2 Advantages	FTP with InfoTransfer v2 Disadvantages
<ul style="list-style-type: none"> Automatic GnuPG file encryption. File contents are protected using GnuPG file encryption. Allows high upload frequency. Quick data turnaround. Automated notification of success or failure via email. Files can be uploaded 24 hours a day, seven days a week. Multiple files can be sent during the same session. Test files can be submitted without changing live login credentials. Provides a history of files transferred. 	<ul style="list-style-type: none"> User credentials are not encrypted (sent as clear text). Manual process that does not support automation. Access to communicate with ftp.pressganey.com must be enabled through your firewall. Must be installed on Windows 7 or newer.

Method 4 (Not Recommended): FTP (File Transfer Protocol) with PGP/GnuPG file Encryption

FTP is a method of transmitting data over the internet using special file transfer applications. All files sent via FTP need to be encrypted with PGP/GnuPG prior to transmission. The Press Ganey public key can be downloaded here:

<http://helpandtraining.pressganey.com/uploadHelp/downloads/Encryption.aspx>

How to Upload

You will need PGP/GnuPG and FTP client software in order to securely transmit data via standard FTP. There are many software solutions available for FTP such as FileZilla, WS-FTP, WinSCP and CoreFTP. More information about GnuPG can be found on their website at <https://www.gnupg.org/>.

We do not provide support for automating the transfer process. Please contact your software vendor for assistance

Test Account Login

Login ID = 000000000000 (12 zeros)

Password = 000000 (6 zeros)

FTP Advantages	FTP Disadvantages
<ul style="list-style-type: none"> Extremely secure using proper encryption. Allows high upload frequency. Quick data turnaround. Automation notification of success or failure via email. Allows uploading by service or site. Should be an acceptable upload method for 	<ul style="list-style-type: none"> User credentials are not encrypted (sent as clear text). Files must be encrypted with PGP/GnuPG before transmission. Access to communicate with ftp.pressganey.com must be enabled through your firewall.



HIPAA with proper encryption.

- Files can be uploaded 24 hours a day, seven days a week.
- Ports 20, 21 must be available. Port 20 is the data port. Port 21 is the session port.
- All ports above 1023 should be available. These are “random upper ports.” They’re used to transmit message acknowledgements and replies between the FTP server and the FTP client. You must install and configure both the FTP software and the encryption (PGP/GnuPG) software on your own.

Press Ganey Support

Related information is available on a number of topics. For questions or concerns about your InfoTurn setup, please contact your Press Ganey account manager at 888.773.7742.