

Hospice CAHPS® InfoTurn Technical Transmission Instructions

A GUIDE FOR SENDING PATIENT DATA TO PRESS GANEY

Table of Contents

- Press Ganey’s InfoTurn® System 2**
- Excluded Records 2
- Ineligible Records 2
- Data File Formats 3**
- Fixed File Format 3
- Comma-Delimited File Format 3
- Pipe Delimited File Format 4
- Excel CSV Format 4
- New Setup Test File Checklist 5**
- Determine who will send test files 5
- Email your file name and layout to your Account Manager 5
- Upload your test file to Press Ganey via the File Transfer Portal 5
- Receive feedback from Press Ganey regarding your test file / Send revisions as needed 6
- Receive approval of test file 6
- Required / Recommended Data Fields 7**
- Race and Ethnicity Field Information 10**
- Transmitting Patient Data to Press Ganey 11**
- Methods of Transmission 11
- Press Ganey File Transfer Portal Information 11
- Receiving your new credentials 12
- Uploading files to Press Ganey 13
- Downloading files from Press Ganey 13
- Using FTP Client Software to Transfer Data 14
- Understanding Update Files 15**
- Troubleshooting & Technical Support 16**
- Technical Support 16
- Wrong File Uploaded – Live Data 16
- Editing & Returning Uploaded Files 16
- Support for Third Party-Applications 16
- HIPAA, HITECH, and the FTP Process 16

Press Ganey’s InfoTurn® System

Hospice CAHPS surveys are available in English, Spanish, Chinese, Russian, Portuguese, Vietnamese, Polish, and Korean. Please discuss the languages offered with your Account Manager during the survey setup process. Using Press Ganey’s InfoTurn System is a requirement for Hospice CAHPS surveying. To use Press Ganey’s InfoTurn System, 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., last name).

Surveys are administered for the Hospice CAHPS program on a monthly basis. As such, the monthly data file should include only the patient records for the appropriate sample month. To allow a period of time between the patient’s death and the caregiver receiving the survey, there is a lag built into the surveying process. **Uploads are due by the 15th of the month** and should contain decedent records for two months prior. For example, between March 1st and March 15th, you must upload January’s data to ensure survey administration to the sampled caregivers during the first week of April.

A successful upload must be received by Press Ganey no later than the 15th in order to meet the survey administration timing requirements. If the data file is not successfully received by the 15th, a discrepancy may be required.

Excluded Records

Your hospice is required to submit its entire decedent/caregiver list, excluding no-publicity patients/ caregivers and patients who are alive at the time of discharge. Under these circumstances, patients/ caregivers **should not receive** a Hospice CAHPS survey. These patients/caregiver records **must be removed before** the file is transmitted to Press Ganey.

Demographic Type	Exclude Record for All Services
Decedents/Caregivers who requested not to have their name released	Exclude
Patients alive at the time of discharge	Exclude
A count of excluded patients must be provided to Press Ganey in each sample month file	

Ineligible Records

All patient records that do not meet the previously detailed exclusion criteria must be included in the monthly data file. Under some circumstances, a survey should not be administered for a given record. Our process will automatically determine eligibility based on the required demographic information you provide. A record is considered ineligible if it meets any of the following criteria:

- Decedent was under the age of 18
- Decedent’s death was less than 48 hours following last admission to hospice care
- Decedent has no caregiver on record
- Decedent’s caregiver is a non-familial legal guardian
- Decedent’s caregiver is a paid non-familial caregiver
- Decedent’s caregiver has an address outside the U.S. or U.S. Territories

Patients not eligible to receive the Hospice CAHPS survey, for example, because they were alive at discharge, under the age of 18, etc., may still be surveyed under another survey instrument administered by Press Ganey.

To survey these populations, you must contact your Press Ganey Account Manager to accurately set up this process.

Data File Formats

Press Ganey can accept standard ASCII text files in either fixed or comma-delimited format. Null characters are not permitted. The maximum record length is 1000 characters, and each record should be terminated by a carriage return line feed (CRLF), which is equivalent to pressing the ENTER key. Each field must be no longer than 50 characters. Each line is considered one record and should not span across multiple lines. Note: Microsoft Excel XLS, Microsoft Word, and Microsoft Access documents are not permitted.

Please note, the monthly Hospice CAHPS data files must be sent separately from records of other service lines.

Multiple services (e.g., inpatient and outpatient testing) may be included in the same uploaded file if the approved layout for each service follows an identical format. In this situation, you may upload a field as empty if it does not apply to a particular service. For example, if inpatient records and outpatient testing records were included in the same uploaded file, the room number field would be populated in the inpatient records, but it could be left blank in the outpatient records.

Pulling Data from Your System

Because we are unfamiliar with your internal information systems, Press Ganey cannot offer advice on the specifics of how to extract your patient data. For assistance, you may contact your EMR vendor, check online forums, consult with other facilities in your system, or contact your IT vendor.

Fixed File Format

A fixed format file simply means that a particular field in every record always starts in the same column. As shown below, for example, every patient record appears on a separate line and the last name for each patient always begins in column 14, the patient’s middle initial is always listed in column 25, and so on. Fixed format files are left justified and space padded. The records may not be tab delimited.

Survey	C_ID	Last	First	Mid	Addr 1	Addr2	City	St	Zip	Various demographic data...			E.O.R.	
OU0101	1234	SMITH	MARY ANNE		410 N MAINE ST	APT 2	RED VILLAGE	IN	46601	43	052505	052705	3W 0130 LAB	123456S 123456 \$
OU0101	1234	JONES	THOMAS	R.	100 W CIRCLE COURT	APT 16-A	GREENTOWN	IN	46600	27	052605	052905	4N 1620 RAD	987654J 123123 \$
OU0101	1234	BROWN	SHEILA	E.	42 E 63RD		BLUEVILLE	IN	46601	54	052405	052605	16E 4321 MAMMO	889988B 112233 \$

Comma-Delimited File Format

Where fields begin within a comma-delimited file depends on the length of the information in each field. The fields must always be listed in the same order and are separated by commas. The commas indicate where one field ends and the next begins. Some systems add quotation marks to each field automatically, which is permissible. It is recommended that you add quotation marks to ensure that a comma within a field is not misinterpreted as a field separator (e.g., “Stephen, J.” could represent the FIRSTNAME field by enclosing the text in quotation marks).

Survey	ClientID	Lastname	Firstname	Middle	Addr1	Addr2	City	State	Zip	Various demographic data...			E.O.R.	
OU0101	1234	SMITH	MARY ANNE		410 N MAINE ST	APT 2	RED VILLAGE	IN	46601	43	052505	052705	3W,0130,LAB	123456S,123456,\$
OU0101	1234	JONES	THOMAS	R.	100 W CIRCLE COURT	APT 16-A	GREENTOWN	IN	46600	27	052605	052905	4N,1620,RAD	987654J,123123,\$
OU0101	1234	BROWN	SHEILA	E.	42 E 63RD		BLUEVILLE	IN	46601	54	052405	052605	16E,4321,MAMMO	889988B,112233,\$

Pipe Delimited File Format

A pipe delimited file has its fields separated by the pipe character, much like a comma delimited file is separated by commas. The fields must always be listed in the same order and are separated by a |. The pipes indicate where one field ends and the next begins. Files must have one record per line with no word wrap.

```
Survey|Client ID|LastName|FirstName|Middle|Address_1|City|State|Zip|Various_DemographicFields|End of Record($)
```

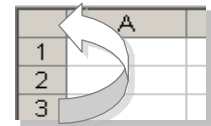
```
OU0101|1234|Ganey|Rodney|404 Columbia Pl.|South Bend|IN|46601|$
```

```
OU0101|1234|Press|Irwin|404 Columbia Pl.|South Bend|IN|46601|$
```

Excel CSV Format

We recommend that you send files in standard ASCII text format, but if Microsoft Excel is used the file should be saved as a CSV (comma-delimited) file. 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. 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.

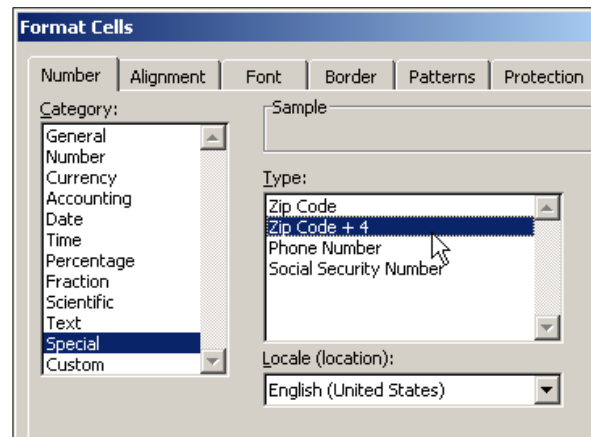


Tip: You may also select the entire spreadsheet by pressing **CTRL + A**.

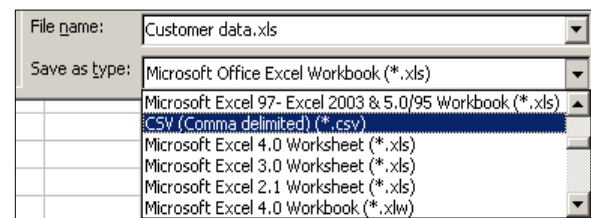
2. From the main menu, select **FORMAT > CELLS > NUMBER > TEXT** and click **OK**. This formats all cells in the spreadsheet as "Text."

3. To populate your spreadsheet with your patient 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 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.



New Setup Test File Checklist



Create a test file

After you've reviewed this guide and have discussed what patient data needs to be included in your upload files, a test file will need to be sent to Press Ganey for review. Real patient data should be used in this test file to help ensure the formatting and layout matches what will appear in the live files.

A file layout (the "map" that tells us which demographic field will appear in each column of your uploaded records) must be provided, either as a header row within the file or in a separate document that is uploaded along with your test file to the MFT Test folder. Files must consistently follow the layout that is tested and approved. Deviations will result in processing failures. If you need to alter the layout, please work with your Account Manager to coordinate.

Provide Press Ganey with a file layout, either as a header or separate file.

Files should be sent in either comma delimited or fixed format. Please see the section on [Data File Formats](#) for additional details.

As we are unfamiliar with your internal information systems, Press Ganey cannot offer advice on the specifics of how to extract your patient data. We recommend that individuals familiar with your databases extract the information or contact the vendor that supports your applications.



Determine who will send test files

Determine who will transmit test files and send your Account Manager their name and email address. Login credentials will be sent from the File Transfer Portal system upon creation



Email your file name and layout to your Account Manager

Once you're ready to send your test file, please email your Account Manager the name of the file and how you will be communicating your file's layout, either with a header row within your file or by sending a separate layout document. If you are sending a separate layout document, include it in the email to the Account Manager or upload it to your test folder along with your test file.



Upload your test file to Press Ganey via the File Transfer Portal

Patient data must be uploaded to Press Ganey via HTTPS or SFTP to ensure patient PHI is protected. You can find more information about transmitting data in the section [Transmitting Patient Data to Press Ganey](#).

The name of your file must include both your client ID and the word "test". This will help ensure your data is easily identified and placed in the correct queue for testing.

When you send your test file, please be sure to notify your Account Manager so they may ensure the file is picked up and assigned for testing as quickly as possible. Be sure to include your file name and layout.

Test files must contain the word **TEST** and your client ID as part of the file name.



Receive feedback from Press Ganey regarding your test file / Send revisions as needed

A Press Ganey EDI will be assigned to review your test file and will provide feedback on any changes needed, if any. When resubmitting a test file, please follow the same process as when sending your initial test file.



Receive approval of test file

Once your test file has been approved and we are ready to receive live patient data, either a member of the Press Ganey EDI team or your Account Manager will notify you that we are ready for live patient data.



Upload first live file via the File Transfer Portal Inbox

The MFT test folder is only for test files, therefore all live files moving forward must be sent to Inbox. **Files uploaded to the test folder will not process or generate surveys.** Before sending your first live file, check with your Account Manager to verify the first visit/discharge date that should be included.

Live data file specifications:

- Files should be named **XXXXXmmddyyyy.csv**. The XXXXX represents your unique client ID assigned by Press Ganey and mmddyyyy represents the month, day, and year the file is transmitted.
- Avoid using special characters in the file name as it may cause your file to be rejected.
- If you are sending multiple client IDs in one file, just use one client ID as part of the naming convention. If you send multiple files daily, file names must be unique (i.e., XXXXXMMDDYYYY_1, XXXXXMMDDYYYY_2).
- Files should not be any larger than 2GB



Review Upload Confirmation emails on an ongoing basis to ensure successful uploads

Your Account Manager will provide you with a guide to help interpret Upload Confirmation emails.



Notify your Account Manager of any planned EMR upgrades or conversions

Any changes made to your EMR will likely affect the patient data you are uploading to Press Ganey. Things that are often changed with these upgrades/conversions, like coding, can affect your extract queries and cause patients to be excluded or included from your upload files inappropriately. If your facility plans on upgrading or changing their EMR, please check with your internal data extraction team to determine whether the proposed upgrade will affect the data. If the data will change, please contact your Account Manager as soon as possible to discuss how it may change the way your patient data is being uploaded.

Required / Recommended Data Fields

Listed below are required fields. Press Ganey will work with you to ensure your compliance with Hospice CAHPS protocol. To meet CMS guidelines, it is required that you provide as much demographic information as possible in the data file.

Field Name	Description
Survey Designator	Alphanumeric code that indicates the survey version a patient should receive. Assigned to you by Press Ganey
Client ID	Client identification number assigned to you by Press Ganey
First Name	Primary caregiver's first name
Middle Initial	Primary caregiver's middle initial
Last Name	Primary caregiver's last name
Address 1	Primary caregiver's address (Abbreviations may be rejected)
Address 2	Apartment, Suite, etc.
City	Primary caregiver's city spelled out (Abbreviations may be rejected)
State	Primary caregiver's standard U.S.P.S. two-letter state abbreviation
ZIP Code	Five digits (Four-digit extension is acceptable)
Phone*	Primary caregiver's phone number, including the three-digit area code
Phone 2*	Primary caregiver's mobile number, including the three-digit area code
Phone 3*	Primary caregiver's additional phone number, including the three-digit area code
Email Address	Primary caregiver's email address
Relation	Primary caregiver's relationship to the decedent: 1 = Spouse / Partner 2 = Parent 3 = Child 4 = Other family member 5 = Friend 6 = Legal guardian (non-familial) 7 = Other 8 = No caregiver of record 9 = Paid caregiver (non-familial) M= Missing

Field Name	Description	
Language	Primary caregiver's primary spoken language: 0 = English 1 = Spanish 3 = Russian 6 = Polish 8 = Portuguese 10 = Chinese – Traditional 13 = Vietnamese 29 = Korean	
Patient First Name	Decedent's first name	
Patient Middle Initial	Decedent's middle initial	
Patient Last Name	Decedent's last name	
Patient ID Number	Hospice generated, unique Decedent/Caregiver ID (Unique number assigned to patient to allow tracking and documentation of care provided)	
Sex	Decedent's sex: 1 = Male 2 = Female M = Unknown / Missing	
Decedent Race	Decedent's Race 1 = White 2 = Black or African American 3 = Asian 4 = Native Hawaiian or Pacific Islander 5 = American Indian or Alaska Native 6 = More than one race 7 = Other M = Missing	Please note that these two fields are required for the XML submission to the Hospice CAHPS Data Warehouse.
Decedent Ethnicity	Decedent's Ethnicity 1 = Hispanic 2 = Non-Hispanic M = Missing	
DEI Race	Decedent's race (See below for more information relating to participation in broader DEI initiatives)	
DEI Ethnicity	Decedent's ethnicity (See below for more information relating to participation in broader DEI initiatives)	
Date of Birth	Decedent's date of birth (mm/dd/yyyy)	
Date of Death	Decedent's date of death (mm/dd/yyyy – Year value in date must be 2015 or greater to be considered valid)	
Admission Date	Decedent's hospice admission date (mm/dd/yyyy – Year value in date must be 2014 or greater to be considered valid)	

Field Name	Description
Discharge Status**	<p>Patient Status (FL17)</p> <p>01 = Discharged to home, revoked, or decertified 30 = Still a patient (“To” date must be last day of the month) 40 = Expired at home 41 = Expired at medical facility 42 = Expired – Place unknown 50 = Discharged / transferred to hospice – home (routine or CHC) 51 = Discharged / transferred to hospice – medical facility (respite or GIP)</p>
Final Location	<p>Decedent’s last location / setting of care:</p> <p>1 = Home 2 = Assisted living 3 = Long-term care facility or non-skilled nursing facility 4 = Skilled nursing facility 5 = Inpatient hospital 6 = Inpatient hospice facility 7 = Long-term care facility (hospital) 8 = Inpatient psychiatric facility 9 = Location not otherwise specified 10 = Hospice facility M = Unknown / Missing</p>
Payment Source – Primary	<p>Decedent’s primary payer:</p> <p>1 = Medicare 2 = Medicaid 3 = Private 4 = Uninsured / no payer 5 = Program for All Inclusive Care for the Elderly (PACE) 6 = Other M = Unknown / Missing</p>
Payment Source – Secondary	<p>Decedent’s secondary payer:</p> <p>1 = Medicare 2 = Medicaid 3 = Private 4 = Uninsured / no payer 5 = Program for All Inclusive Care for the Elderly (PACE) 6 = Other 7 = No Secondary Payer M = Unknown / Missing</p>
Payment Source – Other	<p>Decedent’s other payer:</p> <p>1 = Medicare 2 = Medicaid 3 = Private 4 = Uninsured / no payer 5 = Program for All Inclusive Care for the Elderly (PACE) 6 = Other 7 = No Other Payer M = Unknown / Missing</p>
Primary Diagnosis – ICD-10	<p>Primary Diagnosis for the underlying reason for the hospice care</p> <p>Note – you must provide the appropriate ICD-10 code for this field, it is not acceptable to submit the written description of the code / condition (for example, you must submit I50 as opposed to “Heart failure”)</p>

Field Name	Description
Sample Month	Decedent's sample month (mm) Month in which decedent passed away (should reflect the same month indicated in the date of death above)
Sample Year	Decedent's sample year (yyyy) Year in which decedent passed away (should reflect the same year indicated in date of death above)
Total Live Discharges	Total number of patients who were discharged alive during the sample month
Total Decedents	Total number of decedents / caregivers during sample month, including "No Publicity"
No Publicity	Total number of "No Publicity" decedents / caregivers during the sample month who were excluded from the file
Facility	Per the Hospice CAHPS Quality Assurance Guidelines, "Facility Name" refers to the name of the facility (e.g., name of the assisted living facility, nursing home, hospital, or hospice house) where care was received. Or use N/A if missing/not applicable
E.O.R Indicator	End-of-record marker (i.e., \$)
* Denotes required fields for Phone methodology	
**If your hospice includes live discharges in the monthly file, the appropriate Patient Status code must be included	
DO NOT include SSN or patient insurance/Medicare/Medicaid account numbers	

Race and Ethnicity Field Information

- Organizations **should** upload fields for Race and Ethnicity for all PX services.
 - Organizations should upload separate fields for Race and Ethnicity rather than combining into a single field.
- When organizations send data about Race and Ethnicity, they should minimize sending blank fields or fields that indicate an unknown (e.g., unknown, missing, not available).
- The values for the Race and Ethnicity fields should be text based and interpretable to any user. That is, they should be words like 'Asian' not be a list of codes (e.g., 1, A, AS, R1) that need a key to define them.
 - Note that if your organization is already using FHIR code standards within HL7 to code for Race and Ethnicity, Press Ganey can accept that national standard of codes in lieu of text based value labels.
- The values being sent to define Race and Ethnicity should be consistent across locations and survey populations within the system. That is, the same group should be represented with the same spelling and abbreviations, rather than several different formats, spellings or abbreviations to denote the same group.
- At minimum, the values being sent should define the broad racial groups for Race and denote membership within the Hispanic/Latino identify for Ethnicity. In addition, there should be options to denote 'Prefer not to answer' as well as 'Other' and 'Two or more races' (for the Race variable).

- Below is the minimum set of categories that should be provided – note that your spelling/abbreviations may vary but each of the below should be represented.
 - RACE
 - American Indian or Alaskan Native
 - Asian
 - Black or African American
 - Native Hawaiian or other Pacific Islander
 - White or Caucasian
 - Other
 - Two or more races
 - Prefer not to answer
 - ETHNICITY
 - Hispanic/Latino
 - Not Hispanic/Latino
 - Prefer not to answer
- It is also possible to provide additional values that provide more specific information about an individual's background such as 'Chinese' as a value for Race or 'Cuban' as a value for Ethnicity.

Transmitting Patient Data to Press Ganey

In our role as your Business Associate under the HIPAA Security Rule, Press Ganey is responsible for protecting your patient data once we receive it. We also want to make sure you transmit the data to us in the most secure way possible. We support several methods for file transfer, and some are more secure than others. You should consult with your own security and privacy resources if you have concerns about which of these transmission methods is appropriate for you.

Methods of Transmission

Press Ganey accepts files via **SFTP** (SSH File Transfer Protocol), **FTPS** (FTP Over SSL) and **HTTPS** (Hyper Text Transfer Protocol Secure).

The EDI Specialist will create an account for your data transmissions. This account will contain an Inbox, Outbox and Test folder. Only the test folder will be available during the onboarding phase. Once we are ready to begin survey administration, your Inbox and Outbox will be activated. Regular patient data uploads used for survey administration will be sent to the Inbox. The Outbox will be used to send files back to you. These may include raw data files (xml), bad address and upload results files, to mention a few.

Because email is not secure, we **DO NOT** accept Protected Health Information (PHI) via email.

Press Ganey File Transfer Portal Information

File Transfer Portal can be accessed through a standard web browser. From there, you will be able to connect and transfer data to and from the available folders. Individual users must have their own login credentials. These credentials will follow standard Press Ganey security procedures for password changing and resetting. You will find the Press Ganey File Transfer Portal here: <https://pgds.pressganey.com>.

Receiving your new credentials

You will receive a pair of emails from Press Ganey MFT. The first will have your new Username. The second will contain the password for this account.

Individual accounts will have passwords that expire every 90 days. To change your password, go to the web portal and type in your username. Then click on the Forgot Password button.

Service Accounts

Service Accounts used for automated transfers **must use SSH Key Authentication**. Please send your public key to Press Ganey Client Support (applicationsupport@pressganey.com). Upon creation of the account, you will receive an email with your username for the automated service account.

Instructions for creating an SSH key Pair can be found on pages 22-24.

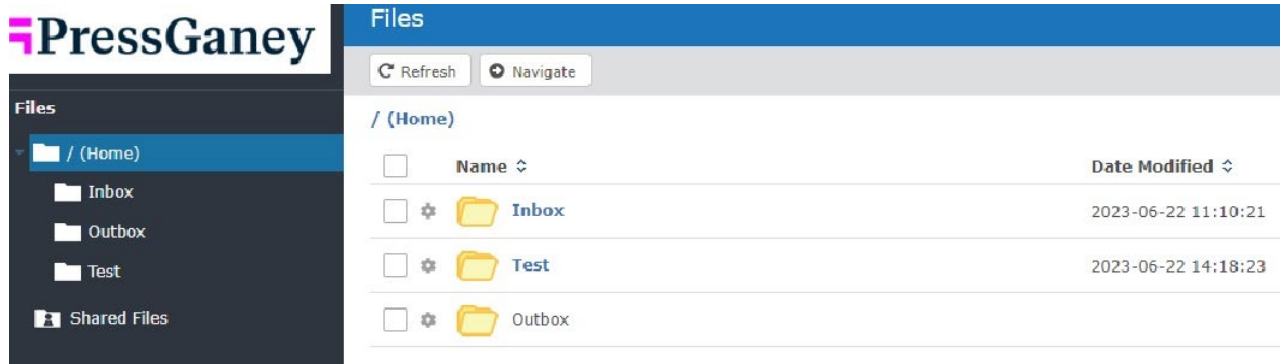


There are several secure methods of transferring files to or from Press Ganey. You can transfer data using our File Transfer Portal website, <https://pgds.pressganey.com> or an FTP Client software application (there are several free options, such as FileZilla, or Core FTP Lite). The address is the same for both the File Transfer Portal and FTP Client Software Applications.

The connection will be encrypted using HTTPS, SFTP or FTPS. This makes it unnecessary to encrypt files before sending them to Press Ganey. However, you may do so if you wish. If you choose to encrypt your files, they must be encrypted with the Press Ganey PGP Public key.

(https://helpandtraining.pressganey.com/pg_public_04162024/)

After logging in, you will see a number of folders like this:

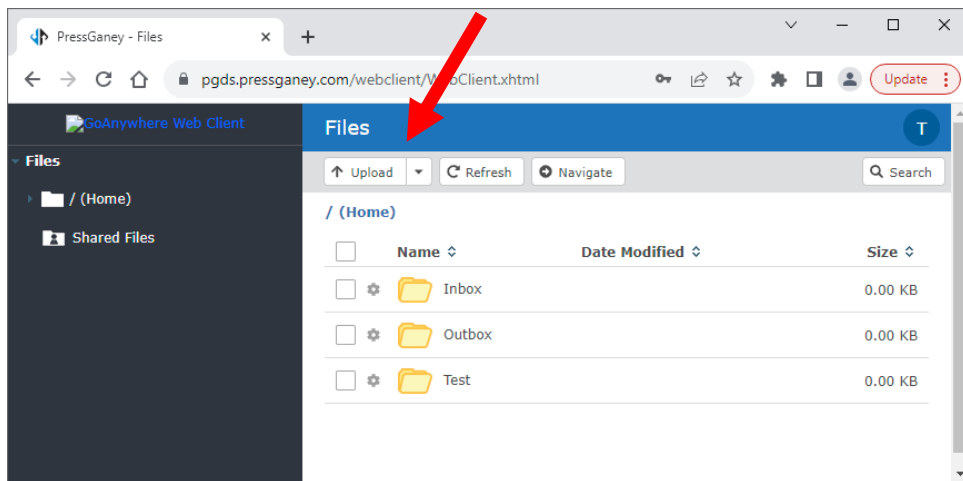


- **Inbox** - live uploads
- **Test** - test files
- **Outbox** or **XML Outbox** - files downloaded from Press Ganey

You may see more than one Inbox if you upload to more than one client number and these will be clearly marked. The same is true for the Outbox if you download information from more than one client number.

Uploading files to Press Ganey

To upload a file, click into the appropriate folder. Click the upload button and navigate to the file you wish to upload to Press Ganey.

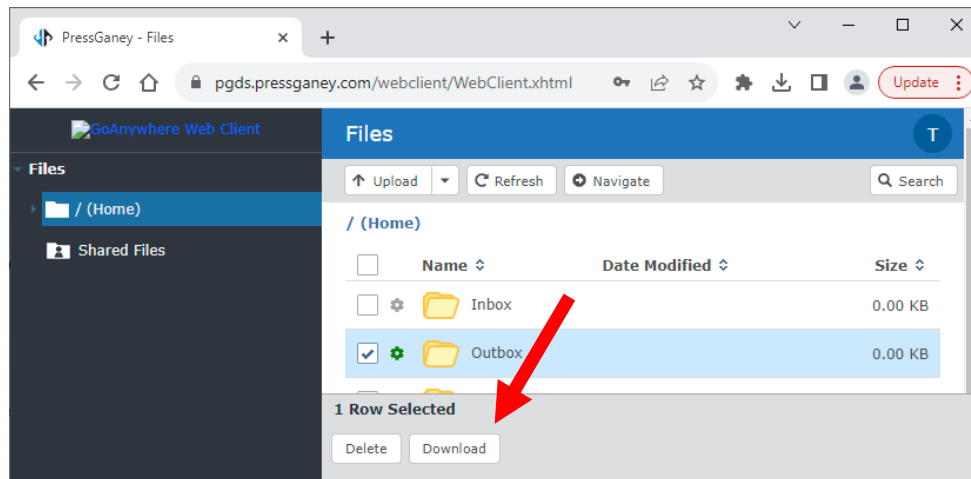


Files placed in the test folder will be moved by the Press Ganey system to an internal staging folder that is monitored by the EDI team. This happens rather quickly, so don't be surprised if the files disappear from your folder after just a few seconds.

Files placed in the inbox folder will be picked up and placed in the queue for processing. If you receive email confirmations with upload results, these will continue as they have in the past.

Downloading files from Press Ganey

If you received reports from Press Ganey, you will be able to access those reports from your MFT account instead of having a separate username and password. The Outbox or XML Outbox folder will be linked to the folders where your reports are stored. Click on the appropriate folder and you will see the reports listed and the download button to assist you in downloading these reports. If you access more than one download folder for your organization, you may have multiple outboxes, and these will be clearly marked.



It's that simple. The File Transfer Portal provides a secure and easy way to send and receive your data files to and from Press Ganey.

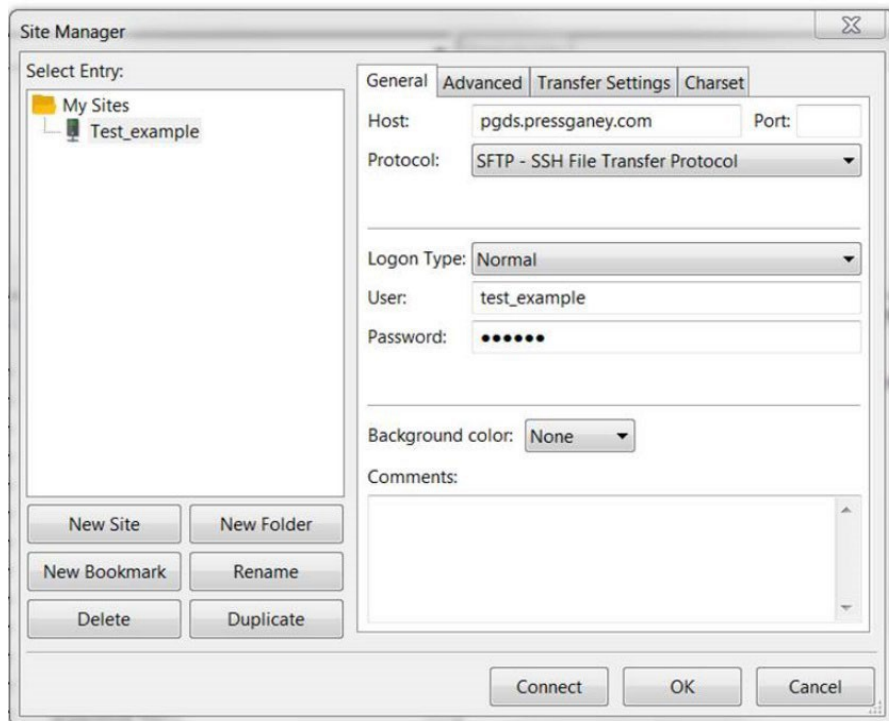
If you encounter any issues logging into the MFT System, please contact the Press Ganey EDI Team at 574.401.8862. If you have any questions about the creation or contents of your patient data files, please contact your IT administrator or EMR Vendor for assistance.

Using FTP Client Software to Transfer Data

You may also access your file transfer account via commonly used FTP client software such as FileZilla, WS_FTP & WinSCP. You may also use your own script to automate the transfer process. Please inform the EDI Specialist that you will be automating your transfer and they will setup a server/service user account that follows a separate security procedure (SSH Key Authentication).

- 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 = pgds.pressganey.com
- The IP address for pgds.pressganey.com is 20.186.49.115 (subject to change).
- Please notify your Application Specialist when a test file has been transmitted. Be sure to include your Client ID, the test file name and the file layout that describes the content and order of the fields in your file.
- **Press Ganey does not provide support for automating the transfer process. Please contact your software vendor for assistance.**

Within your FTP Client software, enter pgds.pressganey.com as the host and the system generated Username and Password you received via email. After your initial login, you can create a new password. Your login credentials are the same for the File Transfer Portal and FTP Client software.

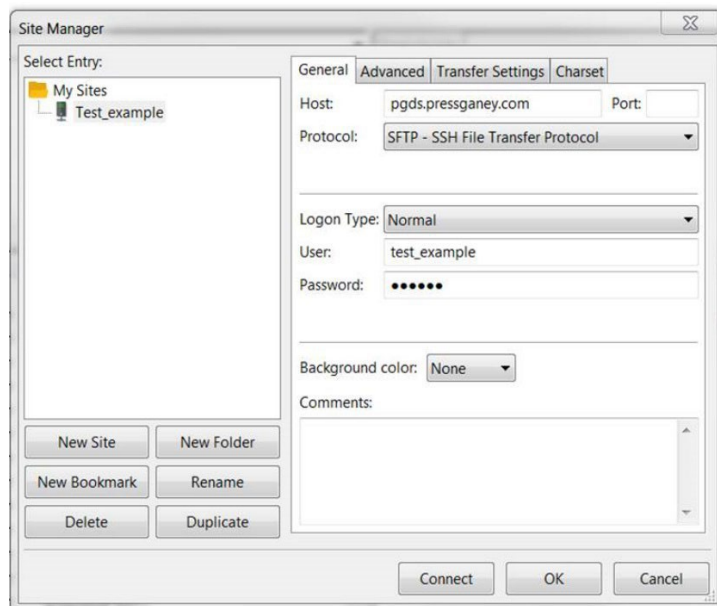


Using FTP Client Software to Transfer Data

You may also access your file transfer account via commonly used FTP client software such as FileZilla, WS_FTP & WinSCP. You may also use your own script to automate the transfer process. Please inform the EDI Specialist that you will be automating your transfer and they will setup a server/service user account that follows a separate security procedure (less frequent required password changes).

- 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 = pgds.pressganey.com
- The IP address for pgds.pressganey.com is 204.13.94.133
- Please notify your Account Manager when a test file has been transmitted. Be sure to include your Client ID, the test file name and the file layout that describes the content and order of the fields in your file.
- **Press Ganey does not provide support for automating the transfer process. Please contact your software vendor for assistance.**

Within your FTP Client software, enter pgds.pressganey.com (or IP Address 204.13.94.133) as the host and the system generated User Name and Password you received via email. After your initial login, you are able to create a new password. Your login credentials are the same for the File Transfer Portal and FTP Client software.



SSH Key Generation

1. Why SSH Key Authentication Is Required for Service Accounts

Secure File Transfer Protocol (SFTP) uses **SSH (Secure Shell)** to securely authenticate users and encrypt data in transit.

Instead of usernames and passwords, **Press Ganey requires SSH key based authentication**, which:

- Is **more secure** than passwords
- Prevents brute-force and credential-theft attacks
- Allows automated and unattended file transfers
- Meets standard security and compliance best practices

With SSH authentication:

- **You keep the private key** (never shared)
- **Share only the public key** with Press Ganey
- Access is granted only if the keys match

2. Overview of What You Will Do

On a Windows system, you will:

1. Install an SSH key generation tool
2. Generate an SSH key pair (public + private key)
3. Store the private key securely
4. Share the public key with Press Ganey
5. Use the private key when connecting to our SFTP host

3. Required Software (Windows)

OpenSSH (Built into Modern Windows)

- Windows 10 and later include OpenSSH by default.
- You may already have it installed. This option is suitable for advanced or command-line users.

4. Creating an SSH Key Pair (OpenSSH – Command Line)

If using OpenSSH:

1. Open **Command Prompt** or **PowerShell**
2. Run: `ssh-keygen -t rsa -b 4096` (minimum 2048 bit, 4096 recommended)
3. When prompted:
 - Accept the default file location
 - Enter a passphrase (recommended)

This creates the keys in your home directory `C:\Users\<<USERNAME>\.ssh\`

- **Private key:** `id_rsa`
- **Public key:** `id_rsa.pub`

The public key is already in **OpenSSH format**.

Notes and Common Variations

- <USERNAME> is the Windows login user who ran ssh-keygen
- The .ssh directory is **hidden by default**
- If the directory does not exist, OpenSSH creates it automatically

If run as a different account

- **Administrator / service account:** C:\Users\Administrator\.ssh\
- **Automated service or scheduled task:** The keys are created under **that account's profile**, not the interactive user

5. Only share the public key

You may provide it as:

- The .pub file
- Or the full public key text (preferred)

✗ Do NOT share

- Private key files (.ppk, id_rsa)
- Passphrases
- Screenshots of private keys

6. How Press Ganey Uses Your Public Key

Once we receive your public key:

1. We install it on our SFTP host
2. It is mapped to your SFTP account
3. You authenticate using your private key
4. Password authentication is disabled (for security)

7. Using the Key to Connect (High Level)

When connecting via an SFTP client:

- Configure the connection to:
 - Use **SFTP**
 - Specify your **private key**
 - Enter your key passphrase (if set)

Popular SFTP clients:

- PuTTY / PSFTP
- WinSCP
- FileZilla (with SFTP support)

8. Key Security Best Practices

- Store private keys in a secure location
- Restrict file permissions where possible
- Do not email private keys
- Rotate keys every 12 months
- Use one key per system or application

Understanding Update Files

It is not always possible to include all demographic data in the original file uploaded to Press Ganey. You may send “update files” at a later time to populate empty fields or to correct data in fields that were incorrect in the original upload. Update files are especially important for HP-CAHPS public reporting. For HP-CAHPS, update files are necessary because some of the data **required** for HP-CAHPS are not known at the time of upload. Data in update files are used to enhance reporting; update files should never be processed for mailing.

Following are the requirements for an update file:

- **Every original and updated patient record sent to Press Ganey must include the Survey Designator, Client ID, Patient ID, Sample Month, and Sample Year.** The Survey Designator, Client ID, Patient ID, Sample Month, and Sample Year in the original file and the update file must be identical and specific to a particular patient in the specific month.
- The update file must use the naming convention:
HOSPICE_CAHPs_UPDATE_SAMEPLEMONTH.csv.
For example, HOSPICE_CAHPs_UPDATE_08.csv, where 08 is the sample month of August.
- A Patient ID field must also be included in your file layout (i.e., the “map” that tells us which demographic variable will appear in each column or field of your uploaded records.) Both original and updated records must follow the file layout that was approved by the Press Ganey Electronic Data Interchange (EDI) Specialist during the upload testing phase.

The following graphic shows how the update process works. Once the original and updated patient records are matched using the Survey Designator, Client ID, Patient ID, Sample Month, and Sample Year, the system compares the data in the two records. A blank field in the update record will not overwrite the corresponding field in the original record (as in the “Lang.” column below). A populated field in the update record will overwrite the corresponding field in the original record (as in the “Gender” column below). An exception to this rule can be seen in the “First Name” column – the Survey Designator, Client ID, Patient ID, Sample Month, Sample Year, first/middle/last names, and address cannot be overwritten.

FILE LAYOUT	Survey Desig.	Client ID	First Name	Middle Initial	Last Name	Address	City	State	ZIP	Relation	Discharge date	Date of Birth	Lang.	Gender	Patient ID	Discharge Status	Sample Month	Sample Year	EOR
ORIGINAL RECORD	HP0101	1234	John	R.	Smith	123 Main	Towne	IN	46601			10161967	1	F	ABC653	50	8	2015	\$
UPDATE RECORD	HP0101	1234	Johnny	R.	Smith	123 Main	Towne	IN	46601	3		10161967		M	ABC653	51	8	2015	\$
RESULT	HP0101	1234	John	R.	Smith	123 Main	Towne	IN	46601	3		10161967	1	M	ABC653	51	8	2015	\$

The Survey Designator, Client ID, Patient ID, Sample Month, and Sample Year must appear in every record and must be identical in the original record and the update record.

Troubleshooting & Technical Support

Technical Support

For questions or concerns about file requirements, data transmission, encryption, or general questions about getting started with InfoTurn, please contact a member of the EDI team at **574-401-8862**.

Wrong File Uploaded – Live Data

If you have uploaded a file or record that should not be processed, immediately contact your Press Ganey Account Manager or any member of the EDI team at **574-401-8862**. Please be ready to provide the filename or information about a specific record, such as medical record number, first and last name, or mailing information for that patient spelled exactly as it appears in your files. We will not stop individual records from processing; the entire file will need to be removed.

Editing & Returning Uploaded Files

To be HIPAA compliant, Press Ganey's EDI staff **cannot edit** files sent in for processing or testing. Your staff must perform any needed changes. Additionally, we **cannot return** uploaded files. We strongly encourage you to keep a copy of all files that you transmit to Press Ganey.

To see detailed results of your uploads (which records processed, skipped, errored, etc.), you need to request InfoTurn Results File be posted to your My Files account in the online tools. These files will post after each upload and will include the full patient record uploaded along with a note about how each record processed.

Note: These files are not available for some official CAHPS services due to CMS guidelines. Please consult your Account Manager for further details.

For other questions or concerns regarding Press Ganey's handling of HIPAA-related issues, please contact your Press Ganey Account Manager.

Support for Third Party-Applications

Because we are unfamiliar with your internal information systems, Press Ganey cannot offer advice on the specifics of how to extract your patient data. We recommend that individuals familiar with your databases extract the information or contact the vendor that supports your applications.

Press Ganey cannot provide technical support for the third-party encryption products discussed in this guide. For help with PGP encryption, please contact www.pgp.com or www.mcafee.com, as appropriate. For GnuPG, please contact www.gnupg.org.

HIPAA, HITECH, and the FTP Process

File transfers between business partners are permitted under HIPAA/HITECH, but those transfers must protect the data being transmitted. While Press Ganey cannot directly control the methods you use to transmit data, we will only process files sent via one of our approved transmission methods. Other approaches (paper files, emails, unencrypted FTP files) will not be processed by Press Ganey and will be deleted as soon as they are detected.

Revised May 2026