



Self Validating Templates User Guide

June 12, 2025

User Guide

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System Requirements

For the best experience and full functionality, please use Microsoft Excel 2010 or a newer version. Older versions may not fully support the built-in data validation features.

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User Guide

Welcome! This guide will walk you through using the self-validating Excel template to submit your financial experience and FSA data. This template is designed to be straightforward and to help ensure the accuracy of the information you provide.

This guide is organized into five parts:

1. **Getting Started:** Initial setup for all templates.
 2. **Entering Your Data:** Specific instructions for the Metadata, Financial Experience, and FSA tabs.
 3. **Correcting Errors:** A visual guide to understanding and fixing common data validation flags.
 4. **Saving & Submission:** Finalizing and naming your files correctly.
 5. **FAQ & Support:** Answers to common questions and how to get help.
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1. Getting Started

The latest version of templates can be downloaded from HSCRC website:
https://hscrc.maryland.gov/Pages/hsp_info2.aspx

System Requirements

For the best experience and full functionality, please use Microsoft Excel 2010 or a newer version. Older versions may not fully support the built-in data validation features.

Understanding the Template Structure

Each Excel workbook contains two important tabs:

- **Metadata:** This sheet identifies the hospital and the reporting period. The information entered here applies to the entire file.
 - **Data Tab (experience_data or FSA):** This is the primary tab where you will input your financial data.
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2. Entering Your Data

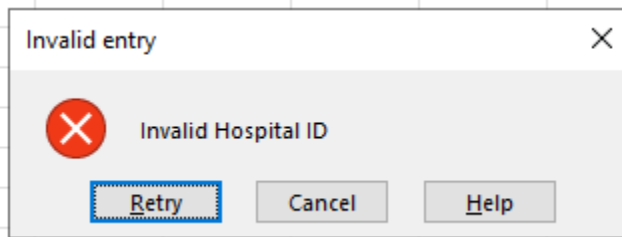
Metadata for All Templates

Please follow these steps carefully to ensure your data is entered correctly.

- **Navigate to the "Metadata" tab.**

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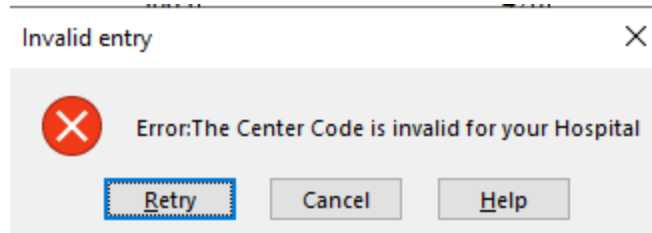
- **Fill in each column sequentially.** This tab will contain only 1 row of data. Ensure that the column headers are not over written.
- **Pay attention to the cell-specific instructions.**
 - a. **hospital_id**
 - Provide the hospital ID in Cell A2 containing a drop down with the six digit hospital ID of your hospital (Medicare Hospital ID). Please choose the appropriate value for the hospital.
 - In case you attempt to type in a value that is not a valid Hospital ID; you will receive an error message as shown in the screen shot below



- b. **report_date**
 - Provide the Report Date in Cell A3. This value must be the first of the reporting month in the MM/DD/YYYY format.
 - If a value other than the first of the month the provided, the text will be displayed in Red
 - Please note that you will be able to save the template with the error; however the file will be rejected after submission
- c. **Provider_name**
 - Once the valid Hospital ID is chosen in Cell A2; the name of the hospital will be displayed in cell C2.
 - This field is a locked field and the user will not be able to enter data in the cell.

For Financial Experience Template

- **Navigate to the "experience_data" tab.**
- **Fill in each column.**
 - a. **Code**
 - For data in the code column, a drop down has been provided with the list of valid Rate Centers. Choose the value from the drop down list for the Rate Center for which the data is being entered.
 - If a value entered in this column is not a valid rate center; you will see the following error message.



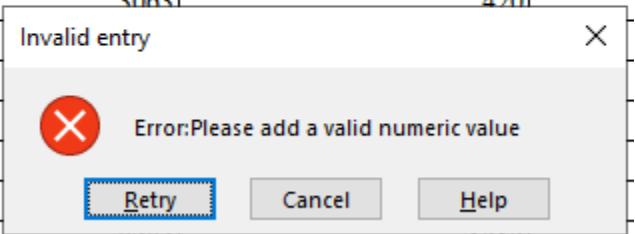
b. vol_in, vol_out, rev_in, rev_out

- These columns are locked for data entry.
- The value for these columns are calculated based on the data entered in the total_in_state_vol_in, total_out_state_vol_in, total_in_state_vol_out, total_out_state_vol_out

c. total_in_state_vol_in, total_out_state_vol_in, total_in_state_vol_out, total_out_state_vol_out

- Enter the relevant data in each of these columns
- Data validation
 - The values should be numeric
 - If a non numeric value is entered in these columns an error message is displayed as shown below

G	H	I	
total_out_state_vol_in	total_in_state_vol_out	total_out_state_vol_out	total_in
	24130		1579
	19668.74187		688.1981343
	3063		420
werew	9204		1212



- Dependent column highlighting
 - The HSCRC rules require users to ensure revenue variables are populated if volume variables are populated.
 - The self validating templates, provides a visual indication to assist the users identify variables are not populated by highlighting the cell in Blue color
 - Eg. The screen shot below; indicates that the **total_in_state_rev_out** variable must be populated; since **total_in_state_vol_out** variable is populated.

G	H	I	J	K	L
total_out_state_vol_in	total_in_state_vol_out	total_out_state_vol_out	total_in_state_rev_in	total_out_state_rev_in	total_in_state_rev_out
	24130	1579	0	0	

d. **med_in_vol_in,med_out_vol_in,med_in_vol_out,med_out_vol_out,med_in_rev_in,med_out_rev_in,med_in_rev_out,med_out_rev_out.**


- These columns are locked for data entry.
- The value for these columns are calculated based on the data entered in the
 med_in_vol_ffs_in,med_in_vol_nonffs_in,med_in_vol_ffs_out,med_in_vol_nonffs_out,med_out_vol_ffs_in,med_out_vol_nonffs_in,med_out_vol_ffs_out,med_out_vol_nonffs_out,med_in_rev_ffs_in,med_in_rev_nonffs_in,med_in_rev_ffs_out,med_in_rev_nonffs_out,med_out_rev_ffs_in,med_out_rev_nonffs_in,med_out_rev_ffs_out,med_out_rev_nonffs_out

e. **med_in_vol_ffs_in,med_in_vol_nonffs_in,med_in_vol_ffs_out,med_in_vol_nonffs_out,med_out_vol_ffs_in,med_out_vol_nonffs_in,med_out_vol_ffs_out,med_out_vol_nonffs_out,med_in_rev_ffs_in,med_in_rev_nonffs_in,med_in_rev_ffs_out,med_in_rev_nonffs_out,med_out_rev_ffs_in,med_out_rev_nonffs_in,med_out_rev_ffs_out,med_out_rev_nonffs_out**

- Enter the relevant data in each of these columns
- Data validation
- The values should be numeric
- If a non numeric value is entered in these columns an error message is displayed as shown below

G	H	I	J
total_out_state_vol_in	total_in_state_vol_out	total_out_state_vol_out	total_in_state_rev_in
	24130	1579	
	19668.74187	688.1981343	
	3063	420	
werew	9204	1212	

Invalid entry ✕

 Error:Please add a valid numeric value

- Dependent column highlighting
 - The HSCRC rules require users to ensure revenue variables are populated if volume variables are populated.

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- The self validating templates, provides a visual indication to assist the users identify variables are not populated by highlighting the cell in Blue color
- Eg. The screen shot below; indicates that the **med_out_vol_ffs_out** variable must be populated; since **med_out_rev_ffs_out** variable is populated.


med_out_vol_ffs_out	med_out_vol_nonffs_out	med_in_rev_ffs_in	med_in_rev_nonffs_in	med_in_rev_ffs_out	med_in_rev_nonffs_out	med_out_rev_ffs_in	med_out_rev_nonffs_in	med_out_rev_ffs_out
59	109	0	0	35823	16831.3	0	0	

For FSA Template

- Navigate to the "FSA" tab.
- Fill in each cell highlighted in yellow.
 - Each value must be numeric.
 - If you enter a value that is not numeric, you will receive an error message as shown below. And the font will be highlighted in Red

Code	Revenue and Expense Summary	Regulated	Unregulated	Total
A	Inpatient Revenues	23423	test	#VALUE!
B	Outpatient Revenues			0
C	Gross Patient Revenues (A+B)	23423	#VALUE!	#VALUE!
D	Inpatient Charity Care			0
D1	Inpatient Bad Debts			0
E	Outpatient Charity Care			0
E1	Outpatient Bad Debts			0
F	Inpatient HSCRC Approved Discounts & Differentials			0
F1	Inpatient Denials			0

Invalid entry

 Error: Please add a valid numeric value

- Calculated fields
 - Each field that does not contain the background color and has a value prepopulated with 0 are calculated fields. The template will automatically populate those fields as the user fills out the yellow cells.
 - Users will not be able to send data into the white cells.
 - White cells with no 0 prepopulated should not be populated with Data.

For FSB Template

- Navigate to the "FSA" tab.
- Fill in each cell highlighted in yellow.
 - Each value must be numeric.

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- b. If you enter a value that is not numeric, you will receive an error message and the font will be highlighted in Red

Code	Balance Sheet Data	Value
AA	Cash & Investments	
BB	Accounts Receivable	
CC	Allowance for Doubtful Accounts	
DD	Net Accounts Receivable (BB-CC)	0
EE	Inventories	
FF	Prepaid Expenses & Other Current Assets	
GG	Total Current Assets (AA+DD+EE+FF)	0
HH	Property, Plant & Equipment	
II	Accumulated Depreciation & Amortization	
JJ	Net Property, Plant & Equipment (HH-II)	0
KK	Other Long Term Assets	
LL	Total Long Term Assets (JJ+KK)	0
MM	Total Assets (GG+LL)	0
NN	Total Current Liabilities	
OO	Long Term Debts	
PP	Other Long Term Liabilities	
QQ	Total Long Term Liabilities (OO+PP)	0
RR	Total Liabilities (NN+QQ)	0
SS	Fund Balance	
TT	Total Liabilities & Fund Balance (RR+SS,TT=MM)	0

- Calculated fields
 - a. Each field that does not contain the background color and has a value prepopulated with 0 are calculated fields. The template will automatically populate those fields as the user fills out the yellow cells.

Understanding Data Validation for All Templates

This template uses data validation to minimize errors. This means that certain cells will only accept data in a specific format.

- **Dropdown Menus:** For some fields, you will be required to select a value from a dropdown list. Please choose the most appropriate option.
- **Date Formats:** All dates must be entered in the MM/DD/YYYY format.
- **Numeric Fields:** Certain columns will only accept numerical data. Do not include any text or special characters in these cells.

Using Programs to Prepare Data

Although recommended, utilizing the provided template for manual data entry is not mandatory. Hospitals can use their custom program to generate the submission files. When utilizing such programs, it is imperative to ensure the output adheres to the following criteria:

- The Metadata tab must be populated, and all values must conform to the specified format.
 - Data tab names must precisely match those provided in the templates.
 - Column names must correspond to those in the templates and be situated in their correct cell locations.
 - The file extension must be either .xlsx or .xls.
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4. Correcting Errors

If you enter data that does not meet the required format, you will see an error message. Don't worry, these are easy to fix!

Types of Error Messages

- **Invalid Entry:** This is the most common error. It means the data you entered does not match the expected format for that cell. The error message will provide a brief explanation of what is required.
 - **How to Fix:** Carefully read the error message and re-enter the data in the correct format. For example, if you see an error for a Center Code, review the codes entered
 - **Red color font:**
 - **How to Fix:** For report date field ensure the value is in MM/YY/DDDD format and is set to the first of the month
 - **Blue Background for Cell:** This error occurs in Experience Template only. It means a volume variable is populated; however; the revenue field is not populated and vice versa
 - **How to Fix:** Review the fields highlighted in Blue and ensure data is populated.
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5. Saving and Submitting Your File

Once you have entered all of your information and have corrected any errors, you are ready to save the file.

1. **Save Your Work:** Save frequently to prevent data loss.
2. **Finalize and Rename:** Once all data is entered and errors are corrected, save the file one last time. Using the following naming convention is recommended:

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- a. For the **Financial Experience** template:
[HospitalID]_Experience_[ReportDate]_[DateofSubmission].xlsx
 - i. *Example: 210001_Experience_05012025_06122025.xlsx*
 - b. For the **FSA** template:
[HospitalID]_FSA_[ReportDate]_[DateofSubmission].xlsx
 - i. *Example: 210001_FSA_05012025_06122025.xlsx*
 - c. Following the file naming convention is not mandatory for these files.
3. **Submit:** Submit the finalized file using DAVE or using SFTP
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6. Frequently Asked Questions (FAQ)

Q: Can I add or delete new columns/rows?

A: Do not delete or add any columns. See below for template-specific guidance regarding rows:

- **Financial Experience:** You may add new **rows** as needed for all your Rate Centers.
- **FSA:** Do not add or delete **rows**. The template structure is fixed.

Q: What if a dropdown menu is missing an option I need?

A: Please contact the hMetrix team at the email hscrteam@hmetrix.com. Do not attempt to add new options to the dropdown lists yourself.

Q: What happens if I try to type in a locked, calculated cell?

A: Excel will prevent you from entering data into locked cells, ensuring that formulas remain intact.

Q: I'm stuck on an error and can't figure it out. What should I do?

A: If you are unable to resolve an error, please contact the hMetrix team by emailing hscrteam@hmetrix.com for assistance.
