

CENTER FOR HEALTH INFORMATION AND ANALYSIS (CHIA)

CHIA Submissions User Guide:
Management Company /Central Office Cost Report
(MGT-CR)

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Purpose

The Center for Health Information and Analysis (CHIA), in accordance with its statutory authority under M.G.L. c. 12C, collects cost reports in furtherance of its mission to monitor the health care system in Massachusetts and to provide reliable information and meaningful analysis for those seeking to improve health care quality, affordability, access and outcomes. The data CHIA collects through the MGT-CR Cost Report is used, among other things, to support the rate-setting obligations of the Executive Office of Health and Human Services (EOHHS), which uses the data to establish rates for Nursing Facility and Residential Care Facility providers, and to complete additional analyses to inform policy-making. Once filed with CHIA, these reports become public documents and will be provided upon request to any interested party.

This document contains step-by-step instructions on how to access, navigate, and submit the cost report through CHIA Submissions portal. “Frequently Asked Questions” are included at the end of the document for additional information on completing the electronic MGT-CR.

Moreover, the data CHIA collects from your MGT-CR is combined with data you report to us on other cost reports (Forms HCF-1, REA-CR, and HCF-4). This supports the calculation of per diem rates of payment for Long-Term Care facilities that care for publicly-aided residents and for informational purposes in various databases. It is extremely important that reports are prepared by persons who are familiar with: Regulation 957 CMR 6.00 Cost Requirements; 957 CMR 7.00 Nursing Facility Cost Requirements; 101 CMR 206.00 Standard Payments to Nursing Facilities; and/or 101 CMR 204.00 Rates of Payment to Resident Care Facilities. Copies of these regulations may be obtained on our website at www.chiamass.gov or from the Secretary of State's Office, Public Document Division, Room 116, State House, Boston, MA 02133, for a nominal charge. Their telephone number is (617) 727-2834.

This application has a printable Technical User Manual which provides detailed instructions on how to use and file an MGT-CR, located at <http://www.chiamass.gov/nursing-facility-cost-report-forms-and-instructions>.

Accessing and Submitting the Cost Report

User Access: CHIA Submissions

- Access CHIA’s online submission platform at <https://chiasubmissions.chia.state.ma.us>.
- Log-in with the Username and Password created during the registration process for the user’s appropriate access level (Data Submitter, Preparer, or Owner).
 - If you do not have a CHIA Submissions Username and Password, you will need to obtain one using the following steps:

- If you are a new user and your facility is currently registered with CHIA, please complete a [User Agreement](#) and email it to CHIA-DL-Data-Submitter-HelpDesk@state.ma.us.
- If you are a new user and your facility has NOT submitted any cost reports to CHIA, you must first complete a [Non-Confidential Data Security Agreement](#) to CHIA and email it to CHIA-DL-Data-Submitter-HelpDesk@state.ma.us.. Once this has been completed and approved, you will need to complete a [User Agreement](#) and email it to CHIA-DL-Data-Submitter-HelpDesk@state.ma.us.
- For assistance in completing this cost report, contact the CHIA **Help Desk at (617) 701-8297** or at CHIAcostreports.LTCF@State.MA.US.
- For technical issues, please call 617-701-8217 or email CHIA-DL-Data-Submitter-HelpDesk@state.ma.us.

PLEASE NOTE: For optimal performance, CHIA recommends users access CHIA Submissions and the MGT-CR using Google Chrome®

Main Menu

- Users will log in using their Username and Password, which is linked to all cost reports and filings registered with the Username and organization.

This is a subscription site and requires registration with the Center for Health Information and Analysis prior to using this site.

CHIA.

Username
|

Password

Remember Me [Forgot Password?](#)

Login

If you have any questions or technical issues, please contact the Center for Health Information and Analysis' Help Desk:

- Choose the selection box titled **LTC Management Company**.

CHIA. WELCOME TO CHIA APPLICATIONS

Welcome to the CHIA Applications Online Platform. This site is used to view and submit data filing, and other information as mandated by the state law.

CHIAmanagement User3

LTC - Management Company

This web application is developed mainly for nursing and residential care facilities to submit their management company cost report.

LAUNCH

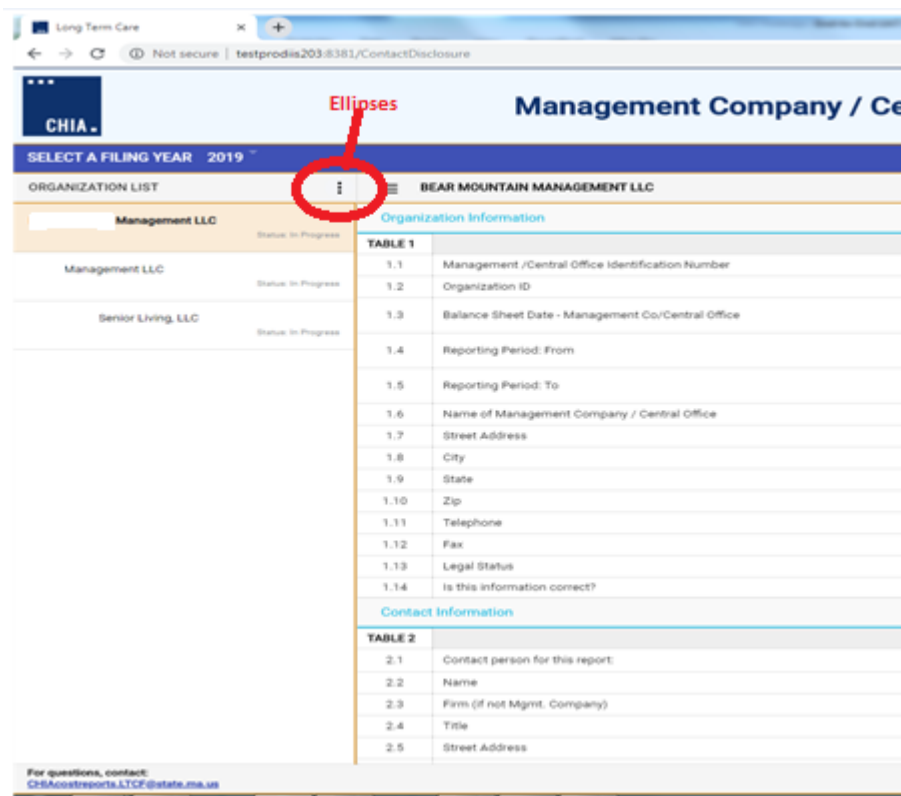
CHIA.

For questions, contact: CHIAcostreports.fcr@state.ma.us

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Home Screen

- The far left side of the screen lists all organizations or provider names and facilities that are registered with your Username.
- Clicking on an organization's name will activate that account and display the information entered in Schedule 1 for the Reporting Year selected. Below is an example of a list of providers on the left hand panel.



Cost Report Year Selection

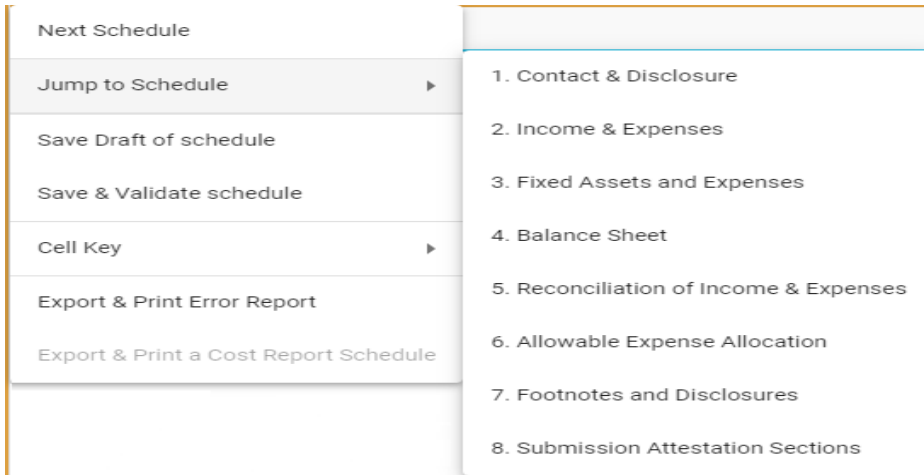
- Once an organization is selected, ensure the appropriate filing year is selected in the drop-down menu on the top of the screen under "Select a Filing Year".

Navigating the Tool

- Users are strongly recommended to save their reports early and often when moving through each of the schedules. This will temporarily save their work, so they may navigate away from the cost report and not lose progress, while not officially submitting their cost report.
- To save a draft, click the "Save as Draft" button, located in the top right hand corner, and as pictured below.



- To navigate between schedules, use the right-hand panel or the drop-down menu box; option labeled “Jump to Schedule”, as illustrated below:



Cell Colors

- Throughout the report, you will note that each cell is color coded. Each color provides guidance as to how you should proceed. For example, light blue color filled cells indicate that the cell requires you to input a response. Also, yellow cells indicate the cell is linked to another cell and does not require your input. To access the key for all cell colors, click on the hamburger menu button, as follows:

| Cell Key | |
|-----------------|--|
| Blue | Input by Data Submitter |
| Light Green | From CHIA Contact Management System |
| Dark Green | From CHIA Contact Management System or Submitter Input |
| Orange | Computation |
| Yellow | Derived from another Tab |
| Grey | Not Applicable |
| Dotted Blue | From Cell on this Tab |
| Red | Non-Allowable Expense |
| Red Border Blue | Must be less than or equal to zero |

Detailed Instructions

For line-by-line instructions detailing the each cell in each schedule, please refer to the CHIA Submissions Technical User Manual for the Management Company /Central Office Report (MGT-CR) located at <http://www.chiamass.gov/nursing-facility-cost-report-forms-and-instructions>.

Schedule 1 Legal Status

- Schedule 1 Table 1 Legal Status. Please refer to the chart below to ensure that the correct legal status for your management company is listed in the cost report.

| Legal Code | Description | Profit / Non-Profit |
|-------------------|--|----------------------------|
| 1 | MA Corp (Chapter 156B) | Profit |
| 2 | MA Corp (Chapter 156B with 501c(3) exemption) | Non-Profit |
| 3 | MA Non-Profit Corp (Chapter 180) | Non-Profit |
| 4 | Partnership, Limited Liability Corporation (LLC) | Profit |
| 5 | Sole Proprietorship | Profit |
| 6 | Governmental Entity | Non-Profit |
| 7 | Other For-Profit | Profit |
| 8 | Other Non-Profit | Non-Profit |
| 9 | Non-MA Corporation | Profit |

Dynamic Tables

- Throughout the cost report, some tables are expandable.
- Click the red plus sign to expand the table, and click the red 'x' above the line number to delete a row.

| Line # | Description | Reported |
|--------|-------------------------------|---------------|
| 3.1 | Gain on sale of equipment | 10,000 |
| 3.2 | Investment income | 10,000 |
| 300 | SUBTOTAL: OTHER INCOME | 20,000 |

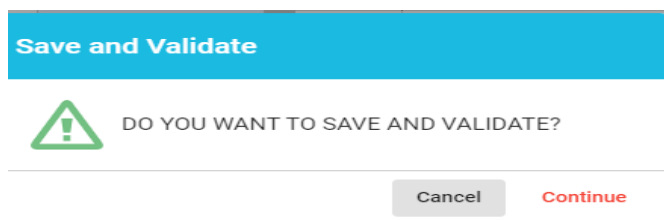
Data Validations

The MGT-CR includes a number of edits or checks within each of the eight schedules which need to be managed through the validation process described below. You will need to resolve all validation errors prior to submitting your cost report. To ease this process, CHIA has created a validation window listing all validation errors. To access the validation window,

The MGT-CR includes a number of edits or checks within each of the eight schedules which need to be managed through the validation process described below. Preparers and submitters will not be able to lock reports for review or submit their cost report unless all schedules have been validated and the errors fixed.

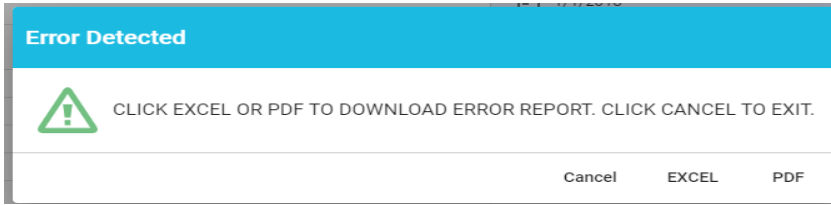
Users will note that there is a “Save and Validate” button at the top right corner of each schedule. **Upon completing a schedule users must click the Save and Validate button to progress through the report.**

When this button is selected, users will encounter the following:

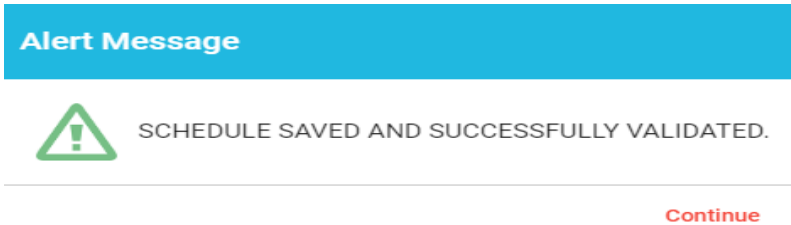


To launch the validation process, users will select “Continue”. Once this is done, there will be two results.

- If there are validation errors, users will need to select the method they would like to view their validation errors, as shown below:



- If there are no validation errors, users will be notified that their schedule saved successfully and can continue completing the cost report.



Additionally, users can launch the validation reports two additional ways.

First, users can click on the hamburger menu button to pull down the menu options on the top left corner as follows:



Then users will select the "Save & Validate schedule" option. This option validates only the current schedule in your view.

Finally, users can launch the "Export & Print Error Report" from the hamburger menu button.

Next, users will be prompted to select which schedule(s) they would like to validate as follows:

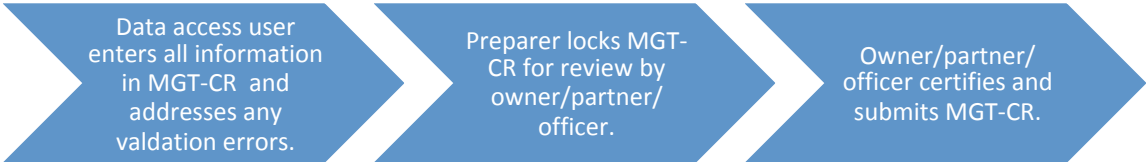
Export & Print Error Report

| | |
|--|--|
| <input type="checkbox"/> Select/Deselect All Schedules | <input type="checkbox"/> Reconciliation of Income & Expenses |
| <input type="checkbox"/> Contact & Disclosure | <input type="checkbox"/> Allowable Expense Allocation |
| <input type="checkbox"/> Income & Expenses | <input type="checkbox"/> Footnotes and Disclosures |
| <input type="checkbox"/> Fixed Assets and Expenses | <input type="checkbox"/> Submission Attestation Sections |
| <input type="checkbox"/> Balance Sheet | |

EXCEL PDF CLOSE

Submitting the Cost Report

- All validation errors must be resolved before users can attest and submit their cost reports.
- The submission process is designed with the following process based on access privileges. Those users with data access privileges can only prepare the report.
- Users with owner, partner, or officer privileges can certify and submit their cost reports.
- CHIA recommends that management companies use the following process to successfully complete and submit the MGT-CR.



- As illustrated above, users with data access only privileges, also known as preparers, prepare the cost report and, once complete, lock the report for final review. Only users with owner, partner, or officer privileges can certify and submit the cost report, which is managed on Schedule 8 of the report.
- NOTE: Users who have data access only privileges cannot access Schedule 8.

Preparers:

- Check Line 1.14 certifying the report. Owners, who are also preparers, have this privilege too.
- Select “Lock for Owner Review”



Owner/Partner/Officer:

- Owners/partners/officers cannot submit until the preparer has locked for owner review.
- Check Line 2.7 certifying the report.
- Click the “Submit” button



Frequently Asked Questions (FAQ)

1. Who can access the web application?

Users who are registered with CHIA to submit the Management Company Cost Report (MGT-CR) will be able to access the application located at <https://chiasubmissions.chia.state.ma.us>. For additional users and technical issues, please call 617-701-8297 or email CHIA-DL-Data-Submitter-HelpDesk@state.ma.us.

2. What are my system requirements?

CHIA Submissions works best on Google Chrome.

3. How can I request to add new user(s)?

Management Companies Providers needing to change users or request additional users should complete a [User Agreement](#) and email the completed form to CHIA-DL-Data-Submitter-HelpDesk@state.ma.us.

If your management company is new or is not registered with CHIA, you must also submit a [Non-Confidential Data Security Agreement](#) to CHIA in order to submit a complete cost report through CHIA Submissions. Please refer to the Cost Report Instructions for more detailed steps on submitting these forms.

4. Can one Management Company have multiple submitters?

User access can be granted for multiple individuals. For changes to user access please contact the CHIA Help Desk.

5. How do I update information in a submitted report?

If the preparer has locked for owner review and needs to change something in the report, the preparer should simply uncheck the attestation box on Line 1.14, make necessary revisions and re-lock the report.

If the Owner, Partner, or Officer has clicked the Submit button, the cost report can only be reopened by contacting CHIA and submitting a request.

Please submit all requests to CHIAcostreports.LTCF@state.ma.us along with the following information:

- User Name
- User E-Mail Address
- Organization Name
- Applicable Filing Year
- Reason for request