GETTING STARTED GUIDE FOR HEALTHCARE COMPLIANCE AND REIMBURSEMENT PRODUCT

LOGGING IN TO YOUR PRODUCT

You will be provided a username and password via e-mail.

*Tip: Check the “Automatically log me in” box so that you don’t have to log in each time!*

Note that on the start screen, you can find our support contacts!
If you have more than one product, you will be prompted to choose the product you wish to enter for this session. Choose the Regulation Suite you prefer, and click CONTINUE.

You can toggle between your available products during a session using the product selector in the upper right corner.
If you saved your log in credentials for automatic sign on, you will be logged into the product most recently accessed.

**SEARCHING**

Searching your preferred libraries is the default.

You also have the option to toggle to search ALL libraries, do an advanced search, or go to the Citations Search tab. When you browse, you will also have the opportunity to search within Browsed Libraries to which you’ve navigated. This will be grayed out if you haven’t browsed.

*Tip:* A very special feature of MediRegs is the ability to SAVE a search for future alerting (see more below).

**BASIC SEARCH**

Enter a search term in the search bar and click search (the magnifying glass). By default, Your Preferred Libraries will be selected; however, you can search all content without library reconfiguration by changing the drop down to All Libraries. See below under Customization & Alerts for steps on setting your content preferences.

*Ex: Click the Home button to start fresh and then enter the word PHYSICIAN in the main search box and click the search button.*

When you search, the system will autosuggest search terms, select any you wish to use.

**REVIEWING & REFINING YOUR SEARCH**

The search results screen has a number of features to help you get to your answer quickly.
- Notice the total number of documents
- Click the (i) button to view your search parameters, scope of content searched and the additional search terms that have been applied to optimize search results.

  Ex: Notice that when you search for PHYSICIAN SELF-REFERRAL, the system automatically also searches for STARK, ANTIREFERRAL, etc.

  If you want to search for exact terms only, deselect the “Include synonyms” box above the magnifying glass.

- Notice the counts next to the Libraries, Agencies, Document Types and Jurisdictions that contain documents that match your search term. Click any to FILTER YOUR SEARCH automatically.

  Ex: Notice that when you select the document type Rules and Regulations, your search results reduce to just those document types.

- Notice the documents which appear in the main document window. These are automatically sorted by relevancy, but you can click to sort by date.
Citation search allows you to browse key laws and regulations, or jump to a specific section by citation. Utilizing the dropdown, you can toggle between different content areas. Notice you can browse the selected title below, or enter a citation to jump directly to it.

*Ex: Select Code of Federal Regulations, then enter 42 CFR 413.75*

You can also search the citations by simply toggling to the search tab.
Coverage search allows you to browse and search Local and National Coverage Determinations, as well as coverage articles, and Medicare contractor bulletins. Pre and post-search filters allow you to quickly narrow to the information you need.

**Important Note:** You can set your state preferences for the Coverage library under My Libraries. Note that there is a Coverage library for current content and an Archived library. Be sure to check on National, as well as whatever states you prefer apply, and to select in the current and archived coverage library. Once you’ve done this, the Coverage tab (will automatically default to your preferences!)
After you have set your states under My Libraries…Coverage:

- Click Home, and then the Coverage Tab.  
  *Notice how the screen automatically shows your preferred states highlighted.*
- Enter a search term  
  *Ex: biofeedback*
- If you wish, pre-filter on specific document types on the left, or change which states to search by selecting boxes in the State Selector section.
- Click the green search button

- Post-filter by document type, Contractor type, or state.  
  *Ex: Notice that when you deselect the document type, your search results are reduced to the remaining document types.*
- Notice the document results which appear in the main window. You might find it helpful to toggle between **Sort by Relevancy** vs. **Sort by Most Recent**.

**CODING AND PAYMENT TOOLS SEARCH**

Your subscription includes code explorer and payment calculator tools. Click on the Coding and Payment Tools tab and use the drop down menu to select the tool or calculator you want to use.
Here is a short summary of each tool:

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code Explorer</td>
<td>Look up CPT and HCPCS procedure codes and connect to related info.</td>
</tr>
<tr>
<td>ICD Explorer</td>
<td>Look up ICD-10-CM diagnosis and ICD-10-PCS codes and connect to related information.</td>
</tr>
<tr>
<td>NCCI Code Pair Check</td>
<td>Review Correct Coding Edits for CPT and HCPCS codes.</td>
</tr>
<tr>
<td>APC Calculator</td>
<td>Calculate provider-specific payment under the Outpatient Prospective System and connect to the APC CodeBook.</td>
</tr>
<tr>
<td>RVU Calculator</td>
<td>Calculate geographic-specific payment under the Physician’s Fee Schedule and connect to the Physician Fee CodeBook.</td>
</tr>
<tr>
<td>MS-DRG Grouper &amp; Calculator</td>
<td>Determine MS-DRG Grouping and calculate provider-specific payment under the Inpatient Prospective Payment System (Opens in a new window)</td>
</tr>
<tr>
<td>NPI/UPIN/DEA</td>
<td>Look up provider identifiers.</td>
</tr>
</tbody>
</table>

**SEARCH WITHIN BROWSED CONTENT**

You can automatically narrow your search by browsing to an area and searching in that neighborhood.

*Ex: Click the HOME button to start over, and then on the left-hand navigation pane, select Libraries… Cases & Administrative Decisions. Notice how the search box now indicates that you will be searching within Browsed Libraries, and the Table of Contents with jump-links appears at the top of the main part of the screen.*
You can search very precisely within whatever title sections you wish, and across multiple title sections.

Ex: After you've navigated to the Cases & Administrative Decisions library, deselect some of the titles by checking the box next to the title in the headings, and then check back on just a few subtitles. Search for the term DOCTOR and notice how your results are automatically filtered. Click on the (i) button to see how the search was navigated.
**SEARCH PREFERRED LIBRARIES**

MediRegs lets you select your preferred libraries so that searches and alerts are customized. Set your preferred libraries and try it out by following these steps:

- In the top utility bar, click My Libraries
- Deselect a few libraries and click Apply
- Click the HOME button to start fresh

IMPORTANT! Your subscription starts with coverage and regulatory libraries for all 50 states. Be sure, at a minimum, to expand and select the appropriate states under the COVERAGE and the STATE LAWS section!

The default MY LIBRARIES search will now reflect that selection.

*Ex: Search My Libraries for the term PHYSICIAN. Note the number of results. Try the search again by toggling to All Libraries and you will usually see more results.*

**ADVANCED SEARCH**

Use advanced search to connect multiple queries together with Boolean connectors, to search with a specific date parameter, or search across only selected content.

**EXECUTING AN ADVANCED SEARCH**

Try the following advanced search to demonstrate all of the options available:

- Click the HOME button to start fresh. Next to the main search box, toggle to Advanced Search
- Enter the term Physician
- Add an additional search term: Medical Record
- Click the PLUS(+) and add OR: Health Record
- On the Publication Date option, search between January 1, 2015 and today
- Deselect some titles and search just within targeted content sections
- Click on Search icon

TIP: Use quotation marks to phrase search

Creating a search alert

Anytime you execute a search, you can save the search. When you save a search, you have the option to set a daily or weekly alert. This will trigger the system to review all new documents in the area where you executed the search for your terms, and alert you if any new documents appear that match your search criteria.

Saving a search

Ex: In any of the examples above, click “Save this Search” and complete the information in the pop up box, including how often you want to be alerted, the title of your search, and the folder into which you’d like your search stored.
REVIEWING A SAVED SEARCH ALERT

Here is an example e-mail generated by MediRegs. Notice that it is clearly identified as a Search Alert, and indicates the product in which you stored the search and the search parameter.

The black text indicates the location of the new document and the blue text indicates the specific document. It is a clickable link that takes you directly to that document.

Note that if you've got more than one document matching search criteria, the alert will list them all.

REVIEWING YOUR SAVED SEARCHES

Click on Saved Searches in the top utility bar to see all of the searches you have previously saved, to review or change alerting, or to delete.
Sometimes it is better to simply “walk your way” through the content, either so that you can move through the documents like you would in an e-reader, or so that you can search within a targeted section of content. On the left-hand side of the product, you have the option to navigate through a set of libraries that are listed in alphabetical order. Take a few minutes to click on each library and become familiar with the available resources.

Note that if you have edited your product under My Libraries, the left-hand list will still list ALL libraries.

**BROWSING THE LIBRARIES**

The library list provides sections of content organized around common workflows. Click on the library heading on the left and then any library to view its contents.

*Ex: Click on the Coding & Payment library*
As you look at a Library Browse view, notice these common features:

- The library is highlighted on the left-hand navigation pane.
- The search box at the top of the screen automatically changes to allow you to search *Browsed Libraries* (which would be just within the library you've entered).
  - Selection boxes throughout the page allow you to target your search with more precision.
- Jump links at the top indicate sub-sections of the library. Content is organized into sub-sections with blue banners. Each title can be clicked on to drill in further.

**BROWSING INSIDE A LIBRARY**

Each library is organized into headings and titles. If there are archived titles, those will be situated at the bottom of the screen. You can click on any heading or title to drill into content. *Ex: Click on the Coding & Payment library, then the Procedure Coding (HCPCS & CPT) heading*
As you browse deeper in a library, notice these common features:

- The search box at the top of the screen automatically changes to allow you to search Browsed Libraries (which would be just within the library subsection you've entered).
  - Content Select boxes on this page allow you to target your search with more precision.

BROWSING INSIDE A COLLECTION OR TITLE

Inside each library, there are headings and content collections or “titles”. You can click on the title of any collection to reveal its contents.

Ex: Click on the Coding & Payment library, then Procedure Coding (HCPCS & CPT)

As you browse into a collection, notice these common features:

- The title you've drilled into is highlighted on the left-hand navigation pane.
- The search box at the top of the screen automatically changes to allow you to search Browsed Libraries (which would be just within the collection you've navigated to).
Selection boxes on this page allow you to target your search with more precision.

From here, you can drill further into content, or check the boxes to refine your search. 

*Note: If a title has a gear symbol next to it (as in the Code Explorer in the picture above), that is a practice tool also available under Coding and Payment Tools.*

**DOCUMENT FEATURES**

Anytime you’ve opened a document, common functions will be available including the ability to email, print, save or favorite a document. You will also have the ability to see where the document “lives” in the product, the option to navigate the table of contents where the document is stored, and move through the collection one document at a time.

*Ex: Click on the Coding & Payment library, then Procedure Coding (HCPCS & CPT), then the HCPCS & CPT CodeBook®, scroll down and open the HCPCS Index and select a letter.*

As you review the document, notice these common features:

- The title you’ve drilled into and where this document is situated in the table of contents is highlighted on the left-hand navigation pane.
  - There is also a “breadcrumb trail” at the top of the document that shows how you navigated to get here.
  - The Previous/Next document buttons here allow you to flip to the next and previous document in the table of contents.
- Several document options are available at the very top of the document. See below for more details on each function.
- The search box at the top of the screen automatically hides to give you a full screen view. Click Show search if you wish.
  - *Note that at this level, the Browsed Libraries search will be within the entire collection you are in. If you wish to search specific sections of the collection, browse back up a level where you can see the check boxes.*

**ADDING A NOTE TO A DOCUMENT**
When you enter a document, at the top of the screen you have the option to add a note. Write whatever you’d like and click Save & Close. This note will be associated with this document, and you can get to your notes in the utility bar at the top of the screen by clicking Notes. If you enter a document that already has a note, the Add Note link will instead appear like this:

![Edit Note ▲ Favorites](image)

**ADDING A DOCUMENT TO YOUR FAVORITES**

When you enter a document, at the top of the screen you have the option to add the document to your favorites. Click on Favorites, choose or create a new folder, and click Save & Close. You can get to your favorites in the utility bar at the top of the screen by clicking Favorites.

**EXPORTING OR PRINTING A DOCUMENT**

When you enter a document, at the top of the screen you have the option to export or print the document. Depending on the format of the document you are viewing, you will see the option to save as a Word or PDF; you can also print to your printer. Click any of those links and follow the on-screen prompts. Additionally, you have the option to email a document as an HTML link or PDF.

![Email ▶ Save Word ▶ Save as PDF ▶ Print](image)

**CUSTOMIZATION AND ALERTS**

**CHOOSING YOUR LIBRARIES**

You have the ability to customize the product by choosing which libraries to keep in your scope. This will change your search My Libraries and the content of your Daily Alerts.

![Saved Searches ▶ Favorites ▶ Notes ▶ My Libraries ▶ My Code Sets](image)

To specify your preferences, in the utility bar at the top of the screen, click on the My Libraries link. Under the Library Settings section, select/deselect titles and click the Apply button.
After you have completed your Library Settings, click home and notice that you now have options for search:

- **My Libraries** – searches the libraries you’ve selected
- **All Libraries** – searches all libraries regardless of your selection
- **Advanced Search** – provides date, Boolean and other search options.
- **Browsed Libraries** – is used when you browse to a sub-section of content to search just within that neighborhood.

**MANAGING FAVORITE DOCUMENTS**

As you review documents, you have the option to save them to your favorites by clicking the **Manage Favorites** and specifying a folder.

To review your favorites, in the utility bar at the top of the screen, click on the Favorites link. From the Favorites section, you can click into a document, download the document as a PDF, and delete the favorite.
MANAGING NOTES

As you review documents, you have the option to add a note to a document by clicking the Add Note or Edit Note link.

To review your notes, in the utility bar at the top of the screen, click on the Notes link. From the Notes section, you can click into a document, where you will be able to edit the note, or you can delete the note.

<table>
<thead>
<tr>
<th>Note</th>
<th>Created</th>
<th>Modified</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drug Approvals for 05 2016</td>
<td>06/06/2016</td>
<td>06/06/2016</td>
<td></td>
</tr>
<tr>
<td>Here is a note for this document.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Review for presentation to CDC.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>OSHA’s Frequently Asked Questions - Background, Enforcement, Recordkeeping, and Compliance Assistance - August 2007</td>
<td>06/06/2016</td>
<td>06/06/2016</td>
<td></td>
</tr>
<tr>
<td>Use as part of OSHA 40 hour training session. See what’s changed since 2007!</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

MANAGING SAVED SEARCHES AND AUTOMATIC ALERTS

As you search in the product, you have the option to save the search by clicking the Save this Search link. To review your existing searches, on the utility bar at the top of the screen, click on the Saved Searches link. From the Saved Searches section, you can click to re-execute the search, review what the search parameters are, establish whether you want daily or weekly alerts, or delete the search.

Watch a video tutorial about MediRegs Alerts here: https://www.brainshark.com/MediRegs/MRAalerts?DM=1

MANAGING YOUR CODE SETS

You have the option to store lists of codes to drop into coding and payment tools quickly by clicking on the My Code Sets link.

Click on the Add new button, and provide a name and list of codes and click Save.

Once you have a code set saved, you can click the SEND arrow and choose a tool to drop the codes into.
Note: If you want an ALERT for the same codes, click home and choose Advanced Search, then search for the same codes with the word OR between each code, and save the search.

DAILY WHAT’S NEW E-MAIL ALERT

You will receive a Daily What’s New email alert each day from MediRegs. Click on MY Libraries to determine which libraries to include in the scope of your alert as noted above.

Here is an example of the Daily Alert generated by MediRegs:

What’s New Alert on Thursday, March 17, 2016
In the Pharmaceutical Regulation Suite

**Health Care State Statutes - Kentucky** - Title XV, Mobile Vehicles - Chapter 181: Licensing of Mobile Vehicles, Operation and Endorsement - Mobile Vehicle Licenses

- Expanded Line: Health Care State Statutes - Kentucky, Title XV, Mobile Vehicles, Chapter 181: Mobile licenses, Operation and Endorsement - Mobile Vehicle Licenses

**Health Care State Statutes - Kentucky** - Title 200, Occupational and Professional - Chapter 151: Registered Nurses - Practical Nurses - General Practice

- Updated Line: Health Care State Statutes - Kentucky, Title 200, Occupational and Professional, Chapter 151: Registered Nurses, Practical Nurses, General Practice

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- Updated Line: Health Care State Statutes - Kentucky, Title 200, Occupational and Professional, Chapter 151: Registered Nurses, Practical Nurses, General Practice

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Note that if you are getting too much information, rather than unsubscribing, it is better to log into the product and select My Libraries to reduce your scope. The best practice is to store searches for specific alerts about the concepts that are most important to you.

What’s New for the current day is also displayed on your home page. Click on a collection to see specific news from an interesting collection or click View All to see the entire publication or archived news. You can view archived news over the past 3, 15, 30 or 60 days. You can also filter the news by date range and sort by Date Published and Library.

WEEK IN REVIEW

Week In Review is generated automatically and is not customized. It provides a review of key federal issuances in the preceding week. When you click the home button, Week In Review appears automatically on the home page.

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Final and Proposed Regulations

Final rule; delay of effective date: Medicare Program; Advancing Care Coordination Through Episode Payment Models (EPMs); Cardiac Rehabilitation Incentive Payment Model; and Changes to the Comprehensive Care for Joint Replacement Model; Delay of Effective Date

Final and Proposed Regulations

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As stated by CMS:

In accordance with the memorandum of January 26, 2017, from the Assistant to the President and Chief of Staff, entitled «Regulatory Freeze Pending Review», this action delays for 30 days from the date of the memorandum the effective date of the rule entitled «Advancing Care Coordination Through Episode Payment Models (EPMs); Cardiac Rehabilitation Incentive Payment Model; and Changes to the Comprehensive Care for Joint Replacement Model», published in the January 3, 2017 Federal Register (82 FR 16). That rule implements three new Medicare Parts A and B episode payment models and a Cardiac Rehabilitation (CR) Incentive Payment model, and implements changes to the existing Comprehensive Care for Joint Replacement model under section 1861A of the Social Security Act (the Act).