



# DATA COLLECTION

USER GUIDE | 2026



# NEW DATADIVE DATA COLLECTION AUTOMATION

Data Collection is now easier than ever! Integrating cumulative feedback over the years, we've redeveloped the data collection process for survey participation to be flexible to your needs. The platform can now accept and process ANY file type, including new MGMA templates, exports pulled directly from practice systems and even home-grown reports. After review of your Practice Demographics, you'll be guided through a simple, four-step process:

1. Upload Files
  - Compensation / Payroll / Census Data
  - CPT / Billing / Claims Data
  - Financial Operations / P&L / Income Statement / General Ledger
2. Mapping Crosswalk
3. Data Checks

For in-depth instructions, we created this helpful guide to walk you through the process!

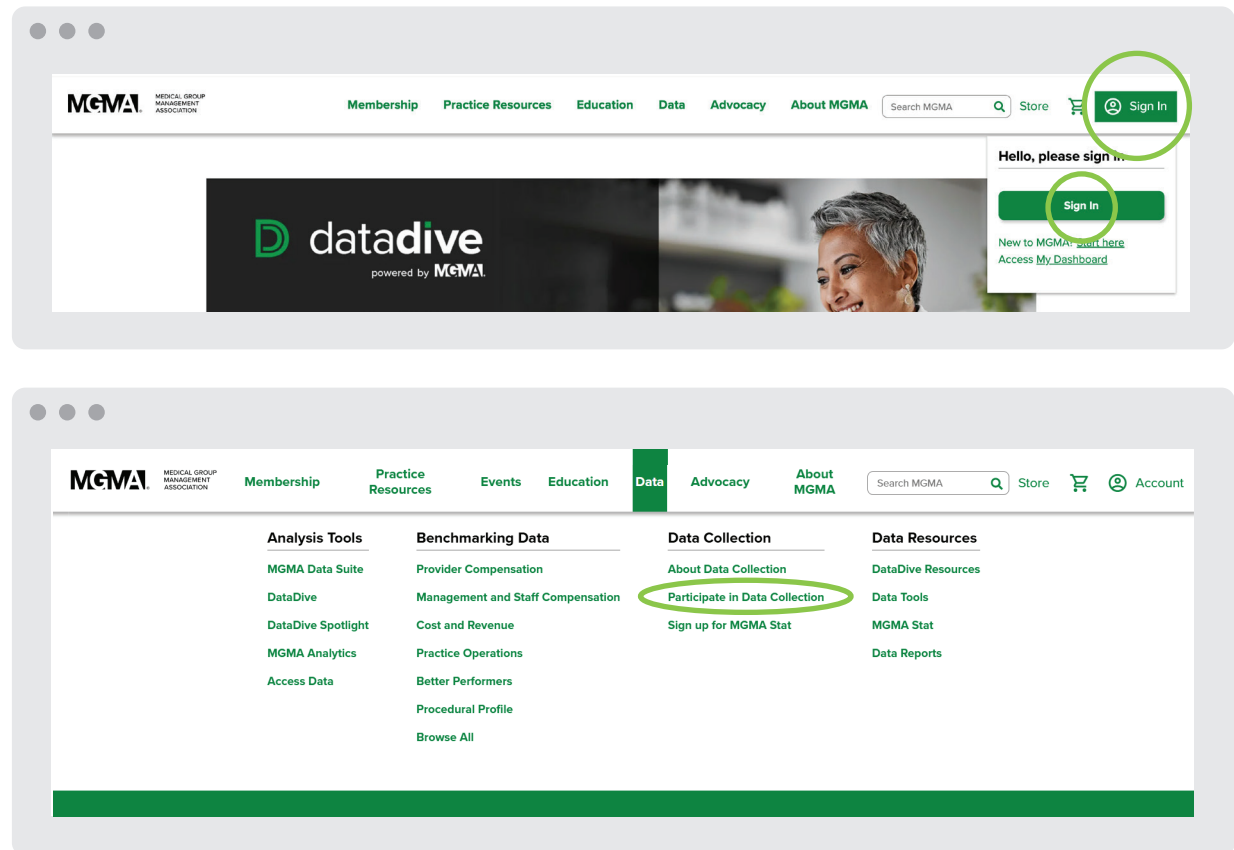
Still have questions? Reach out to our expert team at [survey@mgma.com](mailto:survey@mgma.com).

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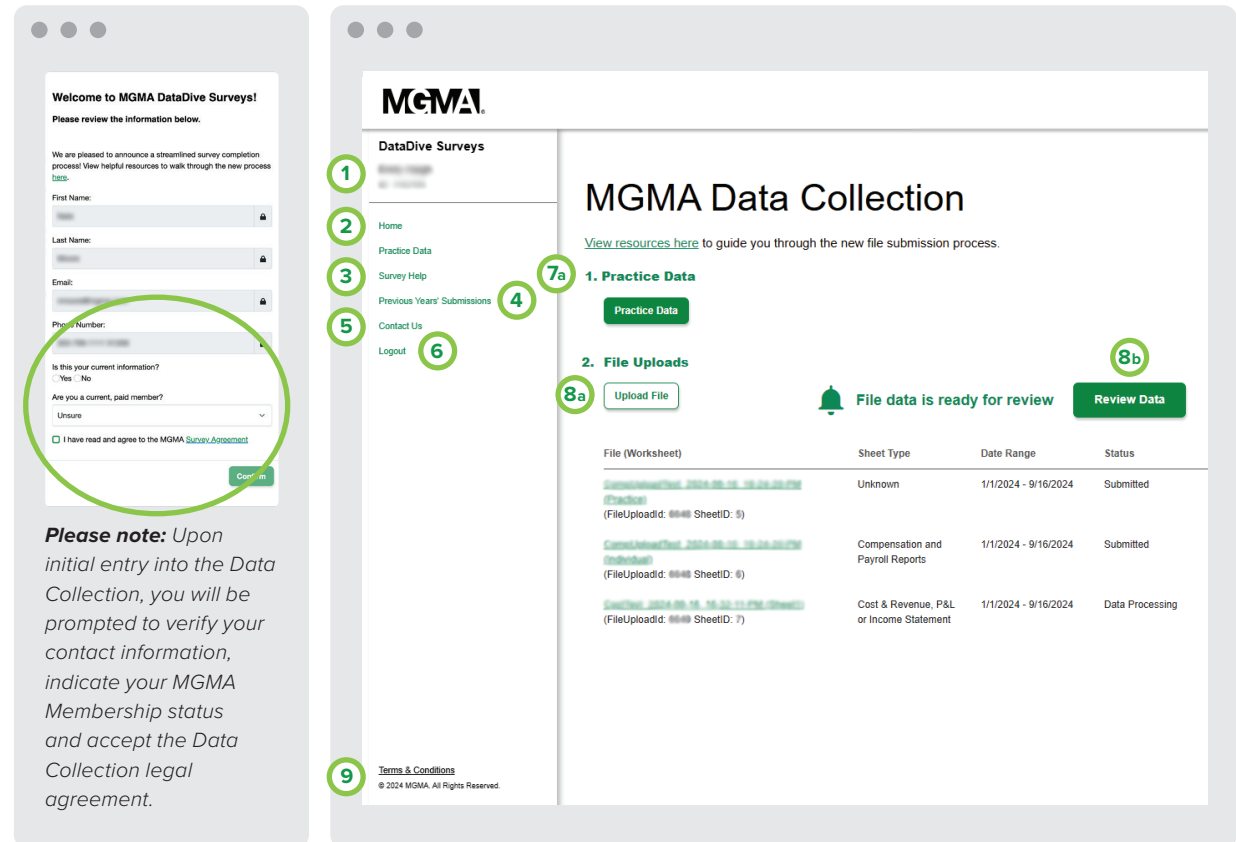
# ACCESSING THE DATA COLLECTION PLATFORM

1. Visit [mgma.com](https://mgma.com)
2. Sign in with your existing MGMA account credentials by clicking **“SIGN IN”** in the navigation bar.
3. Access Data Collection in one of two ways:
  - a. After signing in, click on the **“DATA”** tab in the navigation bar and select **“PARTICIPATE IN DATA COLLECTION”**
  - b. Type **“survey.mgma.com”** in the URL search bar (bookmarking this page is recommended).
4. Upon initial entry, you will be prompted to confirm your contact information and accept an updated data license agreement.



# GETTING AROUND: A VISUAL GUIDE

1. **Your MGMA ID:** This is the MGMA ID associated with the account. If you submit questions for assistance, please include your MGMA ID with your inquiry.
2. **Home:** Use the left navigation to return to this home page.
3. **Data Collection Help:** View helpful resources to guide you through Data Collection completion, including templates and definitions.
4. **All Years' Submissions:** Access Data Collection submitted in previous years. Please note that Data Collection submitted by someone else within your organization may not be displayed.
5. **Contact Us:** If your questions can't be answered with resources in the Data Collection Help menu, you can find our contact information here to receive one-on-one support.
6. **Logout:** Once finished with the submission, or if you need to step away, log out of the Data Collection platform here. Please note that the platform will automatically log out after 20-minutes of inactivity.



## 7. View All Practice Data:

- a. If you have participated in the past, the practice demographic information may already be pre-filled. Click Practice Data to download, review, and make any necessary updates.
- b. If you have not participated in the past, please complete the practice demographic information before uploading files for Data Collection completion.

## 8. Actions:

- a. Click the Upload File button next to the file type intended to be uploaded. The specified file type as well as the status associated with each is displayed.
  - b. By clicking the Review Data button, the files that have already been uploaded can be reviewed.
9. **Terms and Conditions:** The full Data Collection agreement can be viewed here.

# COMPLETE/ REVIEW YOUR PRACTICE DATA

Click through each tab of the Practice Data section (Practice Demogs, Practice Structure, Hours of Operation, Practice Systems) to complete and/or review each section. If these details are not already pre-filled, completing these fields is a one-time investment. This information is saved and will only need to be updated if any of these details change.

- 1. Add Practice:** Click Add Practice to add a new row for inputting additional practice(s).
- 2. Delete Selected:** If a listed practice should be excluded from your data submission, check the box(es) next to the appropriate practice and then click Delete Selected.
- 3. Save:** To save your practice data, click Save.
- 4. Download:** You may view the practice data in Excel format and/or make updates via Excel by using the Download button.
- 5. Upload:** To save any updates made via Excel, click the Upload button and upload your practice data file.

The screenshot shows the 'Practice Data' section of the 'DataDive Surveys' application. On the left is a sidebar with navigation links: Home, Practice Data (highlighted), Resources, Previous Years' Submissions, Contact Us, and Logout. The main content area is titled 'Practice Data' and contains a table with practice information. Numbered callouts are placed over the interface: 1 points to the '+ Add New' button; 2 points to the 'Delete Selected' button (which is disabled); 3 points to the 'Save & Refresh' button; 4 points to the 'Download Data' button; and 5 points to the 'Upload Data' button. The table has columns for Actions, Practice Name, Practice NPI, Practice State, Practice Zip, Report fiscal period, and What type of org. A single row is visible for 'Emily's Practice 101' with NPI 123456789, State Colorado, Zip 80210, and type Hospital. At the bottom, there is a pagination bar showing '1' of 12 items per page, and a status '1 of 1 pages (1 items)'.

| Actions                  | Practice Name        | Practice NPI | Practice State | Practice Zip | Report fiscal period ... | Report fiscal period ... | What type of org |
|--------------------------|----------------------|--------------|----------------|--------------|--------------------------|--------------------------|------------------|
| <input type="checkbox"/> | Emily's Practice 101 | 123456789    | Colorado       | 80210        | January                  | December                 | Hospital         |

# DATA COLLECTION FILES AND UPLOADING

Once you have confirmed your Practice Data is up to date, you can go back to Home to upload your files. Upon clicking the Upload File button (see *Step 8 in Getting Around: A Visual Guide*), you will be prompted with the following:

1. **Select the Timeframe:** Indicate the Start and End dates for which your submission represents.
2. **Upload your File(s):** Either drag-and-drop, or click “CHOOSE FROM COMPUTER” and find, your file(s) to upload.
3. **MGMA Sample Templates:** An example file with required MGMA headers can be downloaded to provide guidance on data for inclusion in your submission.
4. **Upload:** After you have selected the file(s), click Upload Files. Now you are ready to map and review your files!

The screenshot shows a web browser window titled "Upload Files". The dialog box contains the following elements:

- Callout 1:** Points to the "Start Date" and "End Date" input fields. The "Start Date" field is set to "01/01/2025" and the "End Date" field is set to "12/31/2025".
- Callout 2:** Points to the file upload area. It contains a dashed box with the text: "This component will only accept .XLSX or .CSV files, up to 12 files at a time. File size limit (600 MB).". Below this, it says: "To successfully use 'Choose from Computer' option, select the files from a directory then click the 'Open' button. File(s) will not be attached if you do not do this step." There is a green icon of a folder with a plus sign, and the text "Drag and drop files here OR Choose from Computer".
- Callout 3:** Points to the "Having trouble?" section. It includes a link "Contact us here and Ask MGMA for Help" and a list of MGMA templates: "Download Practice Data template", "Download Compensation and Payroll Reports template", "Download Cost & Revenue, P&L or Income Statement template", and "Download CPT and Claims Data template".
- Callout 4:** Points to the "Upload Files" button at the bottom right of the dialog box.

At the bottom left of the dialog box, there is a "Cancel" button.

# COMPLETE YOUR MAPPING CROSSWALK

Once files have been uploaded, you will be prompted to review your file headers to ensure alignment across the MGMA fields. Our system does its best to match your headers, but if any are incorrect, please update as necessary.

1. **Select a worksheet:** Select a worksheet from your submitted files to complete the mapping crosswalk.
2. **What Type of File is This:** Indicate the appropriate file type reflected in the worksheet selected.
3. **Mapping to the MGMA Column Header:** In this section, you will select the MGMA header that corresponds with the header that was provided from your uploaded report.
4. **Add Practice Name:** If the file you upload does not include your practice name, please select from the dropdown list or type in a new practice name.
- 5a. **Select Your Header Row:** In order map your headers, indicate the row your headers start on. After selecting your header row, a dropdown menu will appear.
- 5b. **MGMA Header:** This row will appear after you select your header row. Click through each dropdown menu and select the MGMA header that aligns with yours. Headers that are recognized by our system will auto-populated for you and should be reviewed to confirm accuracy.
6. **Upload Files:** To upload additional files, click Upload Files.
7. **Save and Finish Later:** To save your progress and complete your mapping crosswalk later, click Save and then exit out using the “X” in the top right hand corner.
8. **Review Data:** To save your progress and move on to the next step, Data Cleanup, click “Save & Submit.”
9. **Submit Data:** If you need to upload additional files, this button will return you to Step One. This process needs to be completed for each worksheet/files.

The screenshot shows the 'Mapping Crosswalk' interface with the following elements and callouts:

- 1:** 'Select a worksheet:' dropdown menu showing '2025 MGMA Payroll Template\_2025-01-30\_21-00-17-PM 1 (Providers)'.
- 2:** 'What type of file is this?' section with radio buttons for 'Practice Data', 'Compensation and Payroll Reports' (selected), 'CPT and Claims Data', 'Cost & Revenue, P&L or Income Statement', and a checkbox for 'This file contains Chart of Accounts (COA)'.
- 3:** 'Instructions' box with three steps: 1. Select the row that contains your headers and map them to MGMA headers. 2. Delete all rows and columns that are not part of your data collection or are just label/header records that do not contain values. Also, please check the last page of the data grid for irrelevant data. 3. Submit your data. Below are links for 'Having trouble?' and 'Ask MGMA for Help'.
- 4:** 'Add Practice Name (GroupName)' section with a dropdown menu and an 'Add Group' button.
- 5a:** 'Select Your Header Row' dropdown menu with 'Your header' selected.
- 5b:** 'MGMA header' dropdown menu with 'Practice Name (GroupName)' selected.
- 6:** 'Upload Files' button at the bottom left.
- 7:** 'Save and Finish Later' button at the bottom right.
- 8:** 'Review Data' button at the bottom right.
- 9:** 'Submit Data' button at the bottom right.

The main data grid shows a table with columns: 'Your header', 'MGMA header', 'Column 1', and 'Column 2'. The data rows show 'Practice Name (GroupName)' and 'Employee Name/Identifier (ContextName)' for various practices and employees.

| Your header               | MGMA header               | Column 1                  | Column 2                               |
|---------------------------|---------------------------|---------------------------|----------------------------------------|
| Practice Name (GroupName) | Practice Name (GroupName) | Practice Name (GroupName) | Employee Name/Identifier (ContextName) |
| Practice Name (GroupName) | Practice Name (GroupName) | Practice Name (GroupName) | Provider or Staff Name (ContextName)   |
| Emily's Practice 101      | Practice Name (GroupName) | Practice Name (GroupName) | 127980                                 |
| Emily's Practice 101      | Practice Name (GroupName) | Practice Name (GroupName) | 127981                                 |
| Emily's Practice 101      | Practice Name (GroupName) | Practice Name (GroupName) | 20956                                  |
| Emily's Practice 101      | Practice Name (GroupName) | Practice Name (GroupName) | 9909                                   |
| Emily's Practice 101      | Practice Name (GroupName) | Practice Name (GroupName) | 11129                                  |

# REVIEW SUBMISSION FORMATTING

The final step of your submission will prompt you to review your data. You may see flags for any of the following:

- **Verify Calculations:** This is data that MGMA calculated on the back end based upon data provided to us in your file(s). Please confirm that the calculated information is correct.
- **Review/Update data flags on provided information:** This data may be flagged due to the data points being out of the anticipated range or specific requirements not being met.
- **Review/Update missing information:** This data was not provided in the file uploads, or we were unable to calculate this datapoint based on your submission.

1. **Select Type of File Data:** Data checks will display by each file. Select a data type for review.
2. **Additional Data Checks Are Available:** You can upload a file with your data updated in lieu of making individual updates.
3. **Data Checks:** Red highlighted fields indicate data for review either for verifying calculations, making updates and/or adding missing data.
4. **Accept:** Once you have updated or confirmed each data check, click the green accept checkmark.
5. **Submit Data for Review:** Once all data checks have been completed, and you have accepted your changes, you can submit your data to your analyst for review.
6. **Notes/Comments:** If you would like to provide your analyst with notes or comments regarding your submission, you may include those details here. By clicking the Download File Data button in top right corner the user can now download and review what their data looks like after mapping.
7. **Accept All:** Once you have reviewed all data checks, you can accept all changes at once by clicking this button. This process will need to be complete for each worksheet/files.

The screenshot shows a web application window titled "Data Checks" with a close button in the top right corner. The interface is divided into several sections:

- Section 1:** A dropdown menu labeled "Select Type of File Data" with "Compensation and Payroll Reports" selected.
- Section 2:** A notification area titled "Additional Data Checks Are Available" with a bell icon. It contains two boxes:
  - "CPT & Claims Data" with "28 Data Checks" and a "Preview Data Checks" link.
  - "Financial Operations, P&L or Income Statement" with "144 Data Checks" and a "Preview Data Checks" link.
- Section 3:** A "Re-upload Data" button.
- Section 4:** A section titled "4 Data Checks" with a red triangle icon and an "Accept" button with a green checkmark. Below the title is a message: "The type of on-call coverage provided is missing for at least one of your providers. This is required in order to receive on-call data as part of your participation benefit. Please provide." Below this is a table:
 

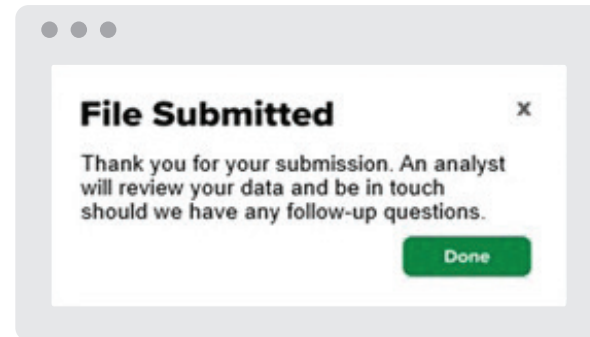
| Provider         | Type of On-Call Coverage Provided | Specialty or Position Title         |
|------------------|-----------------------------------|-------------------------------------|
| Group: Group 500 |                                   |                                     |
| ▲ 1055           | -- Select an Option --            | Cardiology: Invasive-Interventional |
| Group: Group 501 |                                   |                                     |
| ▲ 1056           | -- Select an Option --            | Cardiology: Invasive-Interventional |

 Below the table is a "View All 4 Records" button.
- Section 5:** A "Notes/Comments" section with a text area labeled "Please input your comment here".
- Section 6:** At the bottom right, there are three buttons: "Accept All", "Cancel", and "Submit for Review".

Numbered callouts 1 through 7 are placed around the interface to correspond with the steps in the text: 1 points to the dropdown, 2 to the notification, 3 to the "Data Checks" section, 4 to the "Accept" button, 5 to the "Submit for Review" button, 6 to the "Notes/Comments" section, and 7 to the "Accept All" button.

# DATA COLLECTION COMPLETION!

After reviewing your submission, a pop-up will appear confirming the file was submitted to the Data Collection team.



# SUPPORT

Data Collection participation is as simple as that!  
We understand you might still have questions, though.

## CONTACT

Data experts are available Monday through Friday, 8:00 a.m. to 5:00 p.m. MT.

Call **877.275.6462**, ext. 1895, email [survey@mgma.com](mailto:survey@mgma.com) or set up a 1:1 with a data analyst [here](#).

Visit [mgma.com/datacollection](https://mgma.com/datacollection) for additional helpful resources and information.

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healthcare  
excellence.<sup>SM</sup>