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1 HCRIS User Manual

1.1 Healthcare Cost Report Information System

1.2 Overview

1 HCRIS provides tools for searching, viewing, and exporting Medicare cost report data for hospitals, skilled nursing facilities, and other provider types. This manual describes the available tools and how to use them.

1.3 Version

1.3 v1.0.0 Last updated: September 2026

1.4 Support

- Health Financial Systems
 - Contact: support@hfssoft.com
-

1.5 What This Manual Covers

- Logging In and Access
 - Searching and Browsing Providers
 - Snapshot and Comparison Reports
 - Data Extraction and Exports
 - Provider Lists, Notifications, and Settings
 - FAQs and Support
-

1.6 License

1.4 This project is released under the HFS Licensing.

2 Access and Authorization

2.1 Overview

2 HFS HCRIS uses the HFS SSO (Single Sign-On) system for authentication. When you log in, your account, roles, and licensed systems are validated by the SSO and carried securely in a session cookie for the duration of your visit.

2.2 Who Can Access What

2.2.1 Public Pages

2.2 A small number of pages are accessible without logging in:

- The home page
- The public User Manual ([Support/UserManual](#))
- Legal, Privacy, Terms of Use, and EULA pages

2.2.2 All Other Pages

2.2.2 All tools and features require you to be logged in. Attempting to reach a protected page without a session redirects you to the HFS SSO login screen.

2.3 Licensed Systems

2.3 Your account determines which HCRIS systems (Hospital, SNF, HHA, etc.) appear in your system selector. Systems you are not licensed for do not appear in the navigation, even if you are otherwise authenticated.

3 Home Page — Numbers You Can Trust and Upcoming Events

3.1 Overview

3 The home page displays two types of live information:

1. **Numbers You Can Trust** — record counts from the HCRIS and SaFE databases.
2. **Upcoming Events** — the next scheduled HFS ON24 webinar.

Both sections are updated automatically from the database; there are no hardcoded figures in the page.

3.2 Numbers You Can Trust

3.2 Four counts are displayed:

Label	What it counts
Medicare Cost Reports processed with HFS SaFE to date	Total submissions in the SaFE system
Cost Reports stored in HFS HCRIS	Grand total across all HCRIS systems
Hospital Cost Reports stored in HFS HCRIS	Hospital (2552) cost reports only
SNF Cost Reports stored in HFS HCRIS	Skilled Nursing Facility (2540) cost reports only

3.3 Upcoming Events

3.3 This section shows the next scheduled ON24 webinar hosted by HFS.

A background process monitors the ON24 event calendar and keeps a local copy of the event list up to date. The home page reads from that local copy and displays:

- **Event name** (e.g., "HFS PS&R - Hospitals")
- **Date and time** (e.g., "03/03/2026 11:00 AM")

3.3.1 When There Are No Upcoming Events

3.3.1 If the event list is empty, or all events on the calendar have already passed, the cell displays:

No events scheduled

3.3.2 All Events / Registration

3.3.2 The All Events / Registration button always links to the full HFS event calendar on the HFS website, regardless of whether a specific event is shown.

3.4 HFS Provider User Conference

3.4 The right-hand side of the events table shows the HFS annual user conference details. This section is managed separately and updated manually in the page when conference details change.

4 Provider Search

4.1 Overview

4 Provider Search is the main tool for finding HCRIS Medicare cost report records. You select one or more filters — such as state, fiscal year, or report status — and the system returns a list of matching providers and their cost reports. From the results, you can view report details, download individual report files, export the full list, or send records to the Data Extractor.

Data is sourced from CMS Medicare Cost Reports and is updated each time CMS publishes a new quarterly release.

4.2 Page Layout

4.2 The Provider Search page has two sections side by side:

- **Quick Search** (left panel) — the most frequently used filters, always visible.
- **Advanced Filters** (right panel) — additional filters for narrowing results further.

Both sets of filters work together. You can use Quick Search alone, Advanced Filters alone, or both at the same time.

4.3 Quick Search Filters

Filter	Description
Provider #	Enter one or more provider numbers, separated by commas, to find specific providers directly. As you type a number or name, a dropdown suggests matching providers — pick one to insert its provider number automatically.
Provider Set	Select a predefined group of providers saved in the system.
Report Status	Filter by the status of the cost report (for example: As Submitted, Settled, Reopened).
CMS Published	Select a specific CMS quarterly publication version. Select "All" to search across all versions. Available when a specific CMS version is selected. Options include "Only published on [version]", "On and after [version]", or "On and before [version]". This field is hidden when "All" is selected.
Range	

4.4 Advanced Filters

4.3 Click the Advanced Filters panel on the right to use these additional options. The panel remembers whether you left it open or closed.

4.4.1 Fiscal Year

Filter	Description
Search by FY Begin or End	Choose whether the date range below applies to the fiscal year start date or end date.
Start range	The earliest fiscal year date to include.
End range	The latest fiscal year date to include.

4.4.1 The Start range and End range boxes are disabled until you choose FY Begin or FY End — a date range can't narrow the results until it's clear which fiscal year field it applies to. Pick one from the dropdown first to enable the date boxes.

Use the small **X** button next to each date field to clear it individually.

4.4.2 Provider Classification

4.4.2 These filters may or may not appear depending on the cost report system you are searching (Hospital, SNF, etc.):

- **Hospital Type** — Filter by the type of hospital (for example: short-term, long-term, psychiatric).
- **Provider Type** — Filter by provider classification.
- **Control Type** — Filter by ownership or control category (for example: voluntary non-profit, government, proprietary).

4.4.3 Location

Filter	Description
City	Type a city name to limit results to that city.
State	Select one or more states from the dropdown list.
MAC#	Enter a Medicare Administrative Contractor number (shown only for applicable systems).
CBSA	Enter a Core-Based Statistical Area code (shown only for applicable systems).
NPR	Filter by Notice of Program Reimbursement status (shown only for applicable systems).
Utilization	Filter by utilization category (shown only for applicable systems).

4.4.4 Bed Size and Facility Flags

4.4.3 These filters appear only for systems where they apply:

Filter	Description
Bed Size Min / Max	Enter a minimum and/or maximum number of beds.
DSH	Disproportionate Share Hospital — filter by Yes, No, or All.
Teaching	Teaching hospital status — filter by Yes, No, or All.
CAH	Critical Access Hospital — filter by Yes, No, or All.
SCH/MDH	Sole Community Hospital / Medicare-Dependent Hospital — filter by Yes, No, or All.

4.4.5 Number of Visits (SNF and selected systems only)

4.4.5 Enter minimum and maximum visit counts for:

- **Medical** visits
- **Mental Health** visits
- **Total** visits

4.4.6 Other Filters

- **Organ** — Filter by organ transplant category (shown only for applicable systems).
- **Area** — Filter by geographic area classification (shown only for applicable systems).
- **NAHE** — Filter by NAHE classification (shown only for applicable systems).

4.5 Running a Search

1. Enter or select the filters you want to apply.
2. Click the **Search** button.
3. The page reloads and displays matching results below the filters.

4.4.6 If no filters are set, the search returns all records for the current system — which may be a very large number.

4.5.1 Clearing Filters

- The **Clear** button resets all filter fields (both Quick Search and Advanced Filters).
- To clear only the date fields in Advanced Filters, use the small **X** button next to each date.

4.6 Understanding Results

4.5.1 Results appear in a table below the filters. The header shows the total number of matching providers found.

4.6.1 Results Table Columns

Column	Description
Checkbox	Select individual rows for downloading or extracting.
Expand arrow	Click to expand a row and see additional details.
Provider #	The CMS provider number.
Name	The provider's name.
FYB	Fiscal Year Begin — the start date of the cost report period.
FYE	Fiscal Year End — the end date of the cost report period.
Status	The current status of the cost report.
City	The provider's city.
State	The provider's state.
NPR	Notice of Program Reimbursement status.
Bed Size	Number of licensed beds.
Download	Links to download the individual cost report files (see below).

4.6.2 Expanded Row Details

4.6.1 Click the small arrow on any row to expand it and view additional information, including:

- CBSA, MAC, Area, NAHE, Organ
- DSH, CAH, SCH flags
- Utilization and Visits counts
- Hospital Type, Control Type, Provider Type
- Full Status

Click the arrow in the table header to expand or collapse all rows at once.

4.6.3 Individual File Downloads

4.6.3 Each row may show one or more file download links in the Download column:

- **mcrx** — Download the cost report data file (MCRX format).
- **pdf** — Download the cost report in PDF format.

Links only appear when a file is available for that report.

4.7 Navigating Large Result Sets

4.7 Results are displayed up to 1,000 records per page. When there are more records than fit on one page, a page selector appears above the results. Select a page from the dropdown to navigate through the full result set.

The total number of matching records is shown above the table regardless of how many pages there are.

4.8 Exporting and Extracting Results

4.8 After running a search, the following export options appear above the results table.

4.8.1 Download All (CSV)

4.8.1 Downloads the entire result set — all pages — as a CSV file.

1. Optionally, type a filename in the text box next to the button.
2. Click **Download All (CSV)**.
3. The file downloads to your computer.

4.8.2 Download Selected (CSV)

4.8.2 Downloads only the rows you have checked. This button appears only when at least one row is selected.

1. Check the rows you want to include.
2. Click **Download Selected**.
3. The file downloads to your computer.

To select all rows on the current page at once, check the checkbox in the table header.

4.8.3 Data Extract All

4.8.3 Sends all matching records (for the current filter criteria) to the Data Extractor for processing. Use this when you need structured data fields extracted from the cost reports.

4.8.4 Data Extract Selected

4.8.4 Sends only the checked rows to the Data Extractor. This button is enabled only when at least one row is selected.

4.8.5 Data Extract — quick reference

What you want to extract	Steps
All matching results (every page)	Click Data Extract All
Specific providers you chose	Check the rows you want → click Data Extract Selected

4.9 Saving a Search

4.8.5 You can save the current filter settings under a name so you can reload them later without re-entering each filter.

See [Saved Searches](#) for full instructions.

5 Saved Searches

5.1 Overview

5 Saved Searches let you store a set of Provider Search filter settings under a name. You can reload a saved search at any time to repopulate all filters exactly as you left them — without re-entering each field manually.

Saved searches are personal — each user maintains their own list, and other users cannot see or access yours.

5.2 Accessing Saved Searches

5.2 Your saved searches appear in the left navigation menu, listed under Advanced Search, along with two more items:

- **New Search** — starts a fresh, blank search without loading anything.
- **Last Search** — reloads the filters from whatever you searched with most recently, whether or not you ever explicitly saved it.

Below those, the list shows your named saved searches, most recently used first (up to 15).

New Search and **Last Search** appear as soon as you've run at least one search — you don't need to have saved anything for them to show up. If you've never run a search at all *and* never saved one, **Advanced Search** in the sidebar is just a plain link with nothing underneath it; the sub-menu appears the first time either happens.

5.3 Saving a Search

5.3 You do not need to run the search before saving. The system saves whatever filters are currently set on screen.

1. Set your filter criteria in Provider Search (Quick Search and/or Advanced Filters).
 2. Click the **Save** button next to the Search button.
 3. A prompt asks you to enter a name for the search.
 4. Type a name and click OK.
 - o If a saved search with that name already exists, you will be asked whether you want to overwrite it.
 - o Click OK to overwrite, or cancel to choose a different name.
 5. The saved search is added to the left navigation menu and is immediately available.
-

5.4 Loading a Saved Search

1. In the left navigation menu, click the name of a saved search.
2. The Provider Search page reloads with all filters restored to the values from that saved search.
3. Review the filters, adjust if needed, and click **Search** to run it.

5.4 Loading a saved search moves it to the top of your saved search list.

5.5 Deleting a Saved Search

1. In the left navigation menu, hover over the saved search you want to remove.
2. A small **X** icon appears to the right of the name.
3. Click the **X**.
4. A confirmation prompt appears. Click OK to confirm.
5. The saved search is removed from the list immediately.

5.5 If you have more than 15 saved searches, the next most recently used one will reappear in the list after deletion.

5.6 Notes

- Saved search names must be unique within your account. If you try to save using a name that already exists, the system asks whether to overwrite.
- The list shows a maximum of 15 saved searches, ordered by most recently used.
- There is no limit to how many saved searches you can have — only the 15 most recently used are shown in the sidebar. Older ones remain saved and will reappear as you use or delete others.
- Saved searches cannot be shared with other users.

6 Available Facility Reports

6.1 What Is Available Facility Reports?

6 Available Facility Reports shows you a complete list of every CMS cost report on file for the provider currently active in your session. Each row in the list represents one cost report period — typically one fiscal year — for that provider. The tool is a quick inventory of what has been published by CMS for this provider and what files are available to download.

CMS publishes updated cost report data on a quarterly basis. The list you see reflects the most recent data loaded into the HCRIS database.

This tool is read-only for regular users. HFS staff can additionally add or edit a note on a report via the File Flags column (see below).

6.2 How to Get There

6.2 Available Facility Reports is accessible from the main navigation menu. The page loads automatically and displays results for the provider currently set in your session. No search is required.

6.3 Selecting a Provider

6.3 Above the results table are two dropdowns:

- **My Provider List** — narrows the Provider search box next to it down to just the providers in one of your saved lists, or to **All Providers** in every list you have combined. Leaving it on **All Providers** (the default) shows every provider in the system, same as before this option existed.
- **Provider** — a searchable box to switch to a different provider; the page reloads automatically. Only providers matching the My Provider List selection above appear here.

Switching My Provider List while your currently selected provider isn't in the new list moves the selection to the first matching provider automatically. This selection is now remembered between visits, and it's shared with Snapshot Reports and the Preferences page — pick a list here (or on either of those two) and it's still selected the next time you visit any of them.

6.4 What the Page Shows

6.4 Each cost report period is displayed as a row in a table. The following information is shown for every row:

Provider Number and Name are not repeated on every row — the page is always scoped to one provider at a time, already shown by the Provider selector above the table — but they're still included as the first two columns if you download the list as CSV.

Every column header can be clicked to sort the whole list by that column — click again to reverse the direction. An arrow next to the column name shows which one is currently sorting the list and which direction (▼ descending, ▲ ascending). When the page first loads, the list is sorted by **Fiscal Year End**, most recent first.

Column	Description
Fiscal Year Beginning	The start date of this cost report period
Fiscal Year End	The end date of this cost report period
Status	The current CMS processing status of this cost report (e.g., Submitted, Settled, Reopened)
NPR	Notice of Program Reimbursement indicator
HCRIS Creation Date	The date this cost report record was created in HCRIS
Utilization	A utilization rate indicator
MCR	Download icon for the MCRX cost report data file
PDF	Download icon for the formatted PDF cost report
ECR	Download icon for the raw Electronic Cost Report file — column only appears for HFS staff
File Flags	A red NEW badge appears on reports included in the latest CMS quarterly release. A note icon appears when HFS has a note on file for this submission — hover it for a quick preview, or tap/click it to read the note in a popup. Hovering anywhere else in this column (away from the note icon) shows which CMS quarter that report was published in. Neither indicator appears when it doesn't apply.

Each of the MCR/PDF/ECR columns shows one of three things:

- A download icon, when the file is actually available
- **No Data Available**, when no file was ever recorded for this report
- **File not created**, when a file was recorded but isn't currently found in storage

6.4.1 Adding or Editing a File Flags Note (HFS staff only)

6.4.1 If you're an HFS staff member, you can click anywhere in a row's File Flags column (other than directly on an existing note icon) to open a dialog and set or update the note for that report:

- 1. A dialog titled **File Flags Info** opens, with the instruction "Please enter the file flag information below:" and a text box pre-filled with the current note (blank if there isn't one yet).
- 2. Type or edit the note, then click **Submit** to save it, or **Close** to cancel without saving.
- 3. The page refreshes so the note icon (and everyone else viewing this page) reflects the change.

Regular (non-HFS) users don't see this capability at all — the column isn't clickable for them, and they can only view a note that's already there via the note icon, described above.

6.4.2 Expanded Detail Row

6.4.2 Each row can be expanded to reveal additional information. Click the arrow on the left side of any row to expand it. Additional fields shown in the expanded view include:

- **City / State** — Where the facility is located
- **Bed Size** — The number of licensed beds for this facility during this report period
- **CMS Published** — The CMS quarterly release (e.g., Q1/2026) this cost report was published in. The most recent quarter is shown in red so you can immediately spot the latest published data.
- **CBSA** — Core-Based Statistical Area code for the facility's geographic area
- **Area** — Wage area designation used for Medicare payment purposes
- **Visits** — Outpatient visit counts
- **DSH** — Disproportionate Share Hospital indicator
- **CAH** — Critical Access Hospital indicator
- **MAC / FI** — Medicare Administrative Contractor or Fiscal Intermediary number
- **Organ** — Organ acquisition indicator
- **SCH** — Sole Community Hospital indicator

To expand all rows at once, click the toggle arrow in the table header. Click it again to collapse all rows.

6.5 Downloading Report Files

6.5 Each report period has its own MCR, PDF, and (HFS staff only) ECR column:

Column	What It Contains
MCR	The cost report data file in machine-readable MCRX format, suitable for analysis tools
PDF	A formatted PDF version of the completed cost report form

Each column shows a download icon when the file is actually available, **No Data Available** when no file was ever recorded for this report, or **File not created** when a file was recorded but isn't currently found in storage.

Click the download icon or link to retrieve the file. The file is served directly from the HFS file storage system.

6.6 Notes

- The list displays up to 1,000 cost report periods for the selected provider in a single view. For most providers, all available periods fit within this limit.
- Results open sorted by most recent fiscal year end first; click any column header to change how the list is sorted (see above).
- Switching to a different provider keeps whatever sort order you last chose.
- The data reflects what CMS has published as of the most recent quarterly update loaded into HCRIS.

7 Data Extractor

7.1 What It Does

7 The Data Extractor lets you pull raw data from HCRIS cost reports for the providers returned by your current search. Instead of browsing individual reports on screen, you submit an extraction job that runs in the background. When the job finishes, you download the results as a CSV, Excel, PDF, or CSDX file.

This tool is designed for bulk data work — financial analysis, custom reporting, or feeding cost report data into another system.

7.2 Before You Start

7.2 The Data Extractor works from a search you already ran. Before opening the extractor, go to Provider Search and run a search to identify the providers you want data for. The extractor will show you how many providers your search matched and how many you selected for export.

If you have not run a search yet, or if your search returned zero results, the Extract button will be disabled.

7.3 Opening the Data Extractor

7.3 From the search results page, click the Data Extractor link or button. You can also navigate to it directly from the top menu.

At the top right of the page, a **My Extractions** button takes you to the page where you monitor and download completed jobs.

7.4 Step-by-Step: Submitting an Extraction

7.4.1 . Review the Search Definition

7.4 The right side of the page shows a summary of your current search, including:

- **Total providers found** — the full count matching your search criteria
- **Selected for export** — the count actually included in this extraction (may be smaller if you selected a subset from the results grid)
- The active filters and criteria used

If the provider counts are not what you expect, click **Review or change the search criteria** to go back to the search.

7.4.2 . Choose an Extract Type

7.4.2 Select one of the extract types listed on the left side of the page:

Extract Type	What It Produces
Snapshot Data Set	A tabular export of a specific pre-built snapshot report (e.g., IP PPS summary data) for all matching providers
Worksheet Data Set	Raw worksheet data for one or more worksheet series (A, C, E, S, etc.) across all matching providers
Custom Data Sets	A user-defined set of specific line and column items, built using the Custom Extract editor
Cost Report File (MCRX)	The raw MCRX machine-readable cost report files for matching providers, delivered as a ZIP archive
Cost Report File (PDF)	PDF versions of cost reports for matching providers, delivered as a ZIP archive
Cost Report File (ECR)	ECR cost report files for matching providers, delivered as a ZIP archive

7.4.3 . Configure the Extract

7.4.3 Each extract type shows its own configuration options once selected.

7.4.3.1 Snapshot Data Set

- Select a **Snapshot Type** from the dropdown (for example, IP PPS).

7.4.3.2 Worksheet Data Set

- Use the **Worksheet Series** dropdown to select one or more series.
- Selecting **Worksheets ALL** includes every available series.
- Selecting individual series (A Series, C Series, etc.) includes only those series. Sub-worksheets within each series (for example A-6, A-7) are included automatically.

7.4.3.3 Custom Data Sets

- Select a saved **Custom Specification** from the dropdown.
- If you need to create or edit a specification, click **Manage** to open the Custom Extract editor (see the Custom Extract section of this manual).

7.4.3.4 Cost Report Files (MCRX, PDF, ECR)

- No additional configuration is needed. The format is fixed as ZIP.

7.4.4 . Set the Output Filename

7.4.3.1 Enter a name for your output file in the Output Filename field. The system appends a timestamp to ensure uniqueness, so you do not need to include a date yourself. Example result:

MyHospitals_Worksheets_2026-06-25_14-30-00.csv

If you leave the filename blank, the Extract button remains disabled.

7.4.5 . Choose a Format

7.4.5 For data extracts (Snapshot, Worksheet, Custom), select an output format from the dropdown. Cost report file exports (MCRX, PDF, ECR) are always delivered as ZIP archives and have no format choice.

The available formats depend on the extract type you selected:

Format	Snapshot	Worksheet	Custom
CSV	☐	☐	☐
CSV Pivot	☐	☐	☐
Excel	☐	☐	☐
Excel Pivot	☐	☐	☐
CSV Lookup	—	☐	☐
CSV Lookup Pivot	—	☐	☐

Excel Lookup	—	☐	☐
Excel Lookup Pivot	—	☐	☐
CSV Provider Identifier	—	☐	☐
CSV Provider Identifier Pivot	—	☐	☐
Excel Provider Identifier	—	☐	☐
Excel Provider Identifier Pivot	—	☐	☐
CSV Worksheet Provider	—	☐	☐
CSV Worksheet Provider Pivot	—	☐	☐
Excel Worksheet Provider	—	☐	☐
Excel Worksheet Provider Pivot	—	☐	☐
CSV MCRIF32 API	—	☐	☐
Excel MCRIF32 API	—	☐	☐
PDF	☐	☐	☐
PDF Pivot	☐	☐	☐
PDF Lookup	—	☐	☐
PDF Lookup Pivot	—	☐	☐
PDF Provider Identifier	—	☐	☐
PDF Provider Identifier Pivot	—	☐	☐
PDF Worksheet Provider	—	☐	☐
PDF Worksheet Provider Pivot	—	☐	☐
PDF MCRIF32 API	—	☐	☐
CSDX	—	☐	☐

7.4.5.1 CSV

7.4.5.1 A spreadsheet-compatible comma-separated file. Each row represents one data value. This is the simplest format and works with any spreadsheet application.

Snapshot example:

Provider Number,Provider Name,FYB,FYE,CR Status,HCRIS Creation Date,NPR>Total Beds>Total Days>Total Days
010001,General Hospital,01/01/2023,12/31/2023,As Submitted,03/15/2024,04/01/2024,250,75000,485000
010002,City Medical Center,01/01/2023,12/31/2023,As Submitted,03/20/2024,04/05/2024,180,52000,312000

Worksheet / Custom example:

```
ProvNum,Provider,FYEnd,Status,Sheet,Line,Column,Value
010001,General Hospital,12/31/2023,Final,Worksheet A,1.00,1.00,1250000
010001,General Hospital,12/31/2023,Final,Worksheet A,1.00,2.00,980000
010002,City Medical Center,12/31/2023,Final,Worksheet A,1.00,1.00,3400000
```

7.4.5.2 CSV Pivot

7.4.5.2 Same data as CSV but transposed so that each provider occupies one row. Individual data values become column headers. Useful when you want to compare providers side by side.

Snapshot example (rows are labels, columns are providers):

```
Label,010001 12/31/2023,010002 12/31/2023
Total Beds,250,180
Total Days,75000,52000
Total Charges,48500000,31200000
```

Worksheet / Custom example (rows are providers, columns are worksheet cells):

```
ProvNum,FYEnd,Status,A L1.00 C1.00,A L1.00 C2.00,A L2.00 C1.00
010001,12/31/2023,Final,1250000,980000,620000
010002,12/31/2023,Final,3400000,1200000,890000
```

7.4.5.3 Excel

7.4.5.3 Identical layout to the CSV format above, delivered as an Excel workbook (.xlsx file). Choose this if you prefer to open the file directly in Excel without an import step.

7.4.5.4 Excel Pivot

7.4.5.4 Identical layout to the CSV Pivot format above, delivered as an Excel workbook (.xlsx file).

7.4.5.5 CSV Lookup

7.4.5.5 A compact flat format where the worksheet location (sheet, line, and column) is combined into a single coded key field instead of separate columns. Useful for loading data into databases or analysis tools that expect a key-value structure.

Worksheet / Custom example:

```
ProvNum,FYEnd,Status,Key,Value
010001,12/31/2023,Final,A 00 1.00 1.00,1250000
010001,12/31/2023,Final,A 00 1.00 2.00,980000
010002,12/31/2023,Final,A 00 1.00 1.00,3400000
```

The Key field encodes the worksheet name, program, component, line number, and column number in a fixed layout. This makes programmatic lookups straightforward without parsing multiple columns.

7.4.5.6 CSV Lookup Pivot

7.4.5.6 The pivot version of the Lookup format. One row per provider; each unique key becomes a column header. Combines the compactness of the lookup key with the side-by-side comparison layout of the pivot format.

Worksheet / Custom example:

```
ProvNum,FYEnd,Status,A 00 1.00 1.00,A 00 1.00 2.00
010001,12/31/2023,Final,1250000,980000
010002,12/31/2023,Final,3400000,1200000
```

7.4.5.7 Excel Lookup

7.4.5.7 Identical layout to the CSV Lookup format above, delivered as an Excel workbook (.xlsx file).

7.4.5.8 Excel Lookup Pivot

7.4.5.8 Identical layout to the CSV Lookup Pivot format above, delivered as an Excel workbook (.xlsx file).

7.4.5.9 CSV Provider Identifier

7.4.5.9 A compact flat format like CSV Lookup, but the key is a bracket-encoded string instead of a fixed-width field. The key encodes the worksheet, program, component, line, and column in the format [wtvlc], where each letter is always present and its value follows immediately. Empty values leave just the letter.

The comma before "Part" in the worksheet name is controlled by the **Provider Identifier** setting in Export Settings.

Worksheet / Custom example (comma setting off):

```
ProvNum,FYBegin,FYEnd,Status,Key,Value
010001,10/01/2023,09/30/2024,Final,[wE-2tTitle XVIIIvSwing Beds - SNF10.00c0.00],150000
010001,10/01/2023,09/30/2024,Final,[wAtvl15.00c1.00],75000
```

Worksheet / Custom example (comma setting on):

```
ProvNum,FYBegin,FYEnd,Status,Key,Value
010001,10/01/2023,09/30/2024,Final,[wE-2tTitle XVIIIvSwing Beds - SNF10.00c0.00],150000
010001,10/01/2023,09/30/2024,Final,"[wA-7, Part IIitvl0.00c0.00]",22000
```

When the key contains a comma (due to the comma setting), the CSV output wraps it in double quotes automatically.

7.4.5.10 CSV Provider Identifier Pivot

7.4.5.10 The pivot version of CSV Provider Identifier. One row per provider; each unique bracket key becomes a column header.

Worksheet / Custom example (comma setting on):

```
ProvNum,FYBegin,FYEnd,Status,[wE-2tTitle XVIIIvSwing Beds - SNF10.00c0.00],"[wA-7, Part IIitvl0.00c0.00]",
010001,10/01/2023,09/30/2024,Final,150000,22000,75000
010002,10/01/2023,09/30/2024,Final,180000,31000,
```

Column headers that contain a comma are quoted. Empty cells indicate the provider had no value for that cell.

7.4.5.11 Excel Provider Identifier

7.4.5.11 Identical layout to CSV Provider Identifier above, delivered as an Excel workbook (.xlsx file). Because Excel does not use CSV quoting, comma-containing keys appear in cells without surrounding quotes.

7.4.5.12 Excel Provider Identifier Pivot

7.4.5.12 Identical layout to CSV Provider Identifier Pivot above, delivered as an Excel workbook (.xlsx file).

7.4.5.13 CSV Worksheet Provider

7.4.5.13 A compact flat format where the worksheet location is expressed as a single human-readable label instead of separate columns. The label combines the worksheet name, program, component, line number, and column number into one descriptive string.

The comma before "Part" in the worksheet name is controlled by the **Worksheet Details** setting in Export Settings.

Worksheet / Custom example (comma setting off):

```
ProvNum,FYBegin,FYEnd,Status,Key,Value
010001,10/01/2023,09/30/2024,Final,E Part A Title XVIII Hospital line 0.00 column 0.00,150000
010001,10/01/2023,09/30/2024,Final,A line 15.00 column 1.00,75000
```

Worksheet / Custom example (comma setting on):

```
ProvNum,FYBegin,FYEnd,Status,Key,Value
010001,10/01/2023,09/30/2024,Final,"E, Part A Title XVIII Hospital line 0.00 column 0.00",150000
010001,10/01/2023,09/30/2024,Final,A line 15.00 column 1.00,75000
```

When the comma setting is on and the worksheet name contains "Part", the label is quoted in the CSV output

automatically because it contains a comma.

7.4.5.14 CSV Worksheet Provider Pivot

7.4.5.14 The pivot version of CSV Worksheet Provider. One row per provider; each unique label becomes a column header.

Worksheet / Custom example (comma setting on):

```
ProvNum,FYBegin,FYEnd,Status,"E, Part A Title XVIII Hospital line 0.00 column 0.00",A line 15.00 d
010001,10/01/2023,09/30/2024,Final,150000,75000
010002,10/01/2023,09/30/2024,Final,180000,
```

Empty cells indicate the provider had no value for that cell.

7.4.5.15 Excel Worksheet Provider

7.4.5.15 Identical layout to CSV Worksheet Provider above, delivered as an Excel workbook (.xlsx file). Because Excel does not use CSV quoting, comma-containing labels appear in cells without surrounding quotes.

7.4.5.16 Excel Worksheet Provider Pivot

7.4.5.16 Identical layout to CSV Worksheet Provider Pivot above, delivered as an Excel workbook (.xlsx file).

7.4.5.17 CSV MCRIF32 API

7.4.5.17 A flat format with sixteen columns that mirrors the data exposed by the MCRIF32 programmable API. Each row represents one cell value from a worksheet or custom specification. Unlike other formats, this format includes the raw ECR worksheet identifier, the resolved worksheet name, program and component breakdowns, and A-6 reclassification details in dedicated columns.

This format is available for **Worksheet** and **Custom** extract types only.

Example:

Provider Number,Provider Name,FYB,FYE,CR Status,HCRIS Creation Date,NPR,WKS ECR,Worksheet,Program,
010001,General Hospital,10/01/2022,09/30/2023,Final,03/15/2024,Y,A000000,A,, ,001.00,001.00,125000
010001,General Hospital,10/01/2022,09/30/2023,Final,03/15/2024,Y,A6000A0,A-6,,A,001.00,001.00,8750
010001,General Hospital,10/01/2022,09/30/2023,Final,03/15/2024,Y,A6000A0,A-6,,A,002.00,001.00,3200
010002,City Medical Center,10/01/2022,09/30/2023,Interim,02/20/2024,,A000000,A,, ,001.00,001.00,8300
010002,City Medical Center,10/01/2022,09/30/2023,Interim,02/20/2024,,A6000A0,A-6,,A,001.00,001.00,

Column descriptions:

Column	Description
Provider Number	The CMS provider number
Provider Name	Provider name
FYB	Fiscal year begin date
FYE	Fiscal year end date
CR Status	Cost report status (e.g., Final, Interim, Settled)
HCRIS Creation Date	Date the cost report was created in HCRIS
NPR	Notice of Program Reimbursement indicator
WKS ECR	Raw 7-character ECR worksheet identifier as stored in the database
Worksheet	Resolved human-readable worksheet name (e.g., A, A-6, E-3)
Program	Program sub-section within the worksheet; blank when not applicable
Component	Component within the worksheet; blank when not applicable
Line	Line number in 000.00 format
Column	Column number in 000.00 format
Extract Value	The actual data value (numeric or text)
Other	A-6 reclassification code (e.g., A, AB); blank when the row is not an A-6 reclass worksheet entry
Other Desc.	Description of the A-6 reclassification as entered by the cost report preparer; blank when not applicable

The **Other** and **Other Desc.** columns are populated only for A-6 worksheet entries that carry a reclass code. The reclass code is embedded in the ECR identifier itself — for example, A6000A0 carries code A. When the code is two characters, both appear (e.g., AB). When there is no reclass, both columns are blank.

7.4.5.18 Identical layout to CSV MCRIF32 API above, delivered as an Excel workbook (.xlsx file).

7.4.5.19 PDF

7.4.5.19 Identical layout to the CSV format above, delivered as a PDF document (.pdf file). Choose this when you need a print-ready or archivable document rather than a spreadsheet file.

7.4.5.20 PDF Pivot

7.4.5.20 Identical layout to the CSV Pivot format above, delivered as a PDF document (.pdf file).

7.4.5.21 PDF Lookup

7.4.5.21 Identical layout to the CSV Lookup format above, delivered as a PDF document (.pdf file).

7.4.5.22 PDF Lookup Pivot

7.4.5.22 Identical layout to the CSV Lookup Pivot format above, delivered as a PDF document (.pdf file).

7.4.5.23 PDF Provider Identifier

7.4.5.23 Identical layout to the CSV Provider Identifier format above, delivered as a PDF document (.pdf file). The bracket key format and comma setting behavior are the same as CSV Provider Identifier.

7.4.5.24 PDF Provider Identifier Pivot

7.4.5.24 Identical layout to the CSV Provider Identifier Pivot format above, delivered as a PDF document (.pdf file).

7.4.5.25 PDF Worksheet Provider

7.4.5.25 Identical layout to the CSV Worksheet Provider format above, delivered as a PDF document (.pdf file). The comma setting behavior is the same as CSV Worksheet Provider.

7.4.5.26 PDF Worksheet Provider Pivot

7.4.5.26 Identical layout to the CSV Worksheet Provider Pivot format above, delivered as a PDF document (.pdf file).

7.4.5.27 PDF MCRIF32 API

7.4.5.27 Identical layout to the CSV MCRIF32 API format above, delivered as a PDF document (.pdf file).

7.4.5.28 CSDX

7.4.5.28 A structured XML file (.csdx extension) that reproduces the data extractor output format of the MCRIF32 software. All selected providers are combined into a single file. This format is designed for compatibility with HFS tools or processes that consume MCRIF32-style structured output.

This format is available for **Worksheet** and **Custom** extract types only.

The file contains one <costreport> block per provider followed by a <specifications> block. Each data cell is a <specification> element containing a <worksheet> element with full worksheet metadata and an <adjustment> block with the value, column, line, and error.

Example:

```
<?xml version="1.0" encoding="utf-8"?>
<DataExtractor filelabel="extract.csdX" type="csdx">
  <costreport>
    <item name="number">12345</item>
    <item name="type">2552-10</item>
  </costreport>
  <specifications>
    <specification name="csdx">
      <worksheet
        identifier="[wS-2_Part_ItvHospital120.00c1.00]"
        componentname="Hospital"
        componentcode="C"
        programname=""
        programcode=""
        id="00042"
        name="S-2, Part I"
        part="I">
        <adjustment default="true">
          <item name="value">12500000</item>
          <item name="col">1.00</item>
          <item name="line">20.00</item>
          <item name="error"/>
        </adjustment>
      </worksheet>
    </specification>
  </specifications>
</DataExtractor>
```

Worksheet element attributes:

Attribute	Description
identifier	Bracket-encoded cell address: [w{worksheet}t{program}v{component}l{line}c{column}]. All five letter prefixes (w, t, v, l, c) are always present even when program or component are absent. Spaces and commas in names are replaced with underscores; hyphens are preserved (e.g., A-6 → wA-6). Line and column values have no leading zeros (e.g., 120.00, not 1020.00).
componentname	Human-readable component name (e.g., "Hospital"); blank when not applicable
componentcode	Component code as stored (e.g., "C"); blank when not applicable
programname	Human-readable program name; blank when not applicable
programcode	Program code; blank when not applicable
id	Worksheet ID number, zero-padded to 5 digits (e.g., "00042")
name	Worksheet display name (e.g., "S-2, Part I")
part	Part suffix from the worksheet name (e.g., "I", "II"); blank when not applicable

The `<item name="error"/>` element is always self-closing and carries no content.

Which format should I choose?

- If you need a simple file to review in a spreadsheet: choose **CSV** or **Excel**.
- If you want to compare values across many providers in one view: choose **CSV Pivot** or **Excel Pivot**.
- If you are loading data into a database or analysis tool using lookup keys: choose **CSV Lookup** or **Excel Lookup**.
- If you want both lookup keys and a one-row-per-provider layout: choose **CSV Lookup Pivot** or **Excel Lookup Pivot**.
- If you need a compact bracket key encoding all location context: choose **CSV Provider Identifier** or **Excel Provider Identifier**.
- If you want the bracket key format with a one-row-per-provider layout: choose **CSV Provider Identifier Pivot** or **Excel Provider Identifier Pivot**.
- If you need a fully readable plain-text label describing the worksheet location: choose **CSV Worksheet Provider** or **Excel Worksheet Provider**.
- If you want the plain-text label with a one-row-per-provider layout: choose **CSV Worksheet Provider Pivot** or **Excel Worksheet Provider Pivot**.
- If you need MCRIF32-compatible structured output with ECR identifiers and A-6 reclassification details: choose **CSV MCRIF32 API** or **Excel MCRIF32 API**.
- If you need a print-ready or archivable document instead of a spreadsheet file: choose the **PDF** equivalent of whichever layout above fits your needs (PDF, PDF Pivot, PDF Lookup, PDF Provider Identifier, PDF Worksheet Provider, or PDF MCRIF32 API).
- If you need output compatible with the MCRIF32 data extractor tool's structured XML format: choose **CSDX**.

7.4.6 . Click Extract

7.4.6 Click the Extract button to submit the job. The system places your request in the processing queue and redirects you to the My Extractions page so you can monitor progress.

7.5 Monitoring Your Job

7.5 After submitting, you are taken to the My Extractions page (also accessible via the button in the top-right corner of the Data Extractor page). This page lists your recent extraction jobs with their current status.

See the My Extractions page of this manual for details on statuses and downloading.

7.6 Custom Data Sets

7.6 The Custom Data Sets option lets you extract specific worksheet cells rather than entire series. You define exactly which worksheet, line, and column to retrieve.

7.6.1 Opening the Custom Extract Editor

7.6.1 From the Data Extractor page, select Custom Data Sets, then click Manage next to the specification dropdown. The Custom Extract editor opens in a separate page.

For a specification with a very large number of rows (a couple thousand or more), a brief "**Formatting data...**" message appears above the grid while the Worksheet/Program/Provider dropdowns are populated. This is expected and passes on its own — no action is needed.

7.6.2 Creating a Specification

1. Click **Add Specification**.
2. Enter a unique name for the specification and click **Create List**.
3. The editor loads with an empty grid.

7.6.3 Adding Rows

7.6.2 Each row in the grid defines one data point to extract. For each row, select or enter:

- **Worksheet** — choose from the dropdown list of available worksheets for the current system
- **Program** — selects the program sub-section within the worksheet (auto-populated based on the worksheet; hidden when there is only one option)
- **Provider** — selects the provider component within the worksheet (auto-populated; hidden when only one option exists)
- **Line** — the line number (numeric format, e.g. 1.00, or ALL to include all lines)
- **Column** — the column number (numeric format, e.g. 1.00, or ALL to include all columns)

To add multiple rows at once, enter a number (1-99) in the **Rows to add** box — or pick a common value from the dropdown next to it — and click the + button.

Rows save automatically as you fill them in. A row left completely blank is removed automatically rather than saved.

7.6.4 Quick Adds

7.6.4 Click Quick Adds to open a panel of one-click buttons for commonly requested fields that aren't regular worksheet cells:

- **Fiscal Year Begin / Fiscal Year End**
- **NPR Date**
- **Provider Number / Provider Name**
- **Report Status**
- **HCRIS Creation Date**
- **Processed Date** — when CMS received this data

Click a button to add that row to the specification immediately, or check several boxes and click **Add Selected** to add them all at once.

7.6.5 Managing Specifications

7.6.5 From the specification dropdown, select an existing specification. The action menu (three-dot button) provides options to:

- **Rename** the specification
- **Export** the specification as a CSV file (useful for backup or sharing)
- **Import** a CSV file to populate or update rows
- **Sync Master Data** — refreshes the worksheet, program, and component name lookups from the system's reference data
- **Delete List** — permanently removes the specification and all its rows

7.6.6 Importing a Specification from CSV

7.6.6 If you have a CSV file containing your line definitions:

1. Click the action menu and select **Import List**.
2. Select your CSV file. The expected format is: `Worksheet Name, Program Name, Provider Name, Line, Column`.
3. Check **Clear existing rows before importing** if you want to replace the current rows rather than append to them.
4. Click **Start Import**. A results dialog reports how many rows were imported and lists any rows that could not be matched.

By default, a row that matches one already in the specification (same worksheet, program, provider, line, column, and reclass code) is imported anyway. To have matching rows skipped automatically instead, uncheck **Allow Duplicate Rows on Custom Extract Specification Import** in your User Settings (Preferences) — see the User Settings guide.

7.7 Tips

- Run a focused search before extracting. The job processes every provider in your search result, so a more targeted search produces a faster job.
- For large extractions, the job may take several minutes. You do not need to stay on the page — check back on the My Extractions page at any time.
- Downloaded files are kept for one year. After that, you would need to re-submit the extraction.
- If a job fails, you can click **Retry** on the My Extractions page to resubmit it.

8 My Extractions

8.1 What This Page Shows

8 The My Extractions page lists all data extraction jobs you have submitted, most recent first. Each row represents one job you requested from the Data Extractor.

You can reach this page by clicking **My Extractions** in the top-right corner of the Data Extractor, or by navigating to it from the menu.

Only your own extractions are shown. You cannot view or access extractions submitted by other users.

8.2 Extract-Ready Notification

8.2 When one or more of your extractions finishes while you are browsing other pages, a red badge appears on the download icon in the navigation bar at the top of every page. The badge shows the number of completed extractions you have not yet viewed (up to 9; displays 9+ when more than nine are waiting).

Clicking the icon takes you directly to the My Extractions page. Once you open that page the badge is cleared automatically — it will not reappear for the same jobs.

The badge updates live, the instant a job finishes, no matter which page you're on — you do not need to refresh the page or wait for it to catch up. It does not appear while you are already on the My Extractions page.

8.3 Email Notification

8.3 If your extraction takes longer than a few minutes to complete, the system sends an email notification to the address on your account once the job finishes. The email includes a direct link to the My Extractions page so you can download the file immediately.

This notification is intended for extractions that run long enough that you might step away from the site. Short jobs that complete quickly do not trigger an email.

If you no longer wish to receive these notifications, you can adjust your preferences from the link included at the bottom of the notification email.

8.4 The Extractions Table

8.4 Each row in the table shows the following information:

Column	Description
Requested At	The date and time when you submitted the job
Filename	The output filename, including the timestamp suffix
Status	The current state of the job, plus a Downloaded or Download Error badge once you've attempted to download the file at least once (see below)
Completed At	The date and time the job finished, or a dash if it has not finished yet
Actions	A Download button when the file is ready, or error and retry options if the job failed

8.5 Job Status Values

Status	Meaning
Pending	The job has been submitted and is waiting in the queue to be picked up for processing.
Processing	The job is actively running. The system is querying cost report data and building your output file.
Completed	The job finished successfully. A Download button appears in the Actions column.
Failed	The job encountered an error and did not produce a file. A View Error button shows the error detail, and a Retry button lets you resubmit the job.
Cancelled	The job was cancelled before it completed.

8.5 The page updates live while any of your jobs are in Pending or Processing status — status, download links, and error/retry options all appear the instant the job's state changes, without you needing to reload the page.

8.6 Downloading a Completed File

8.6 When a job shows a Completed status:

1. Click the **Download** button in the Actions column.
2. The file downloads directly to your browser.

The file is the same CSV or ZIP archive you configured when you submitted the job.

Downloaded files are retained for one year from the date the job completed. After that period, you would need to resubmit the extraction to get the data again.

8.6.1 Downloaded Badge

8.6.1 After you download a file, a gray Downloaded badge appears next to the Completed status label for that job. Hovering over the badge shows the date and time of the most recent download in the format Last downloaded on: [date/time]. The timestamp updates each time you download the file, so you can tell at a glance when you last retrieved the data.

8.6.2 Download Error Badge

8.6.2 Occasionally a job that shows Completed can no longer actually be downloaded — for example, its file was cleaned up from storage after the one-year retention window, or it was skipped while bundling a multi-file download (see below). When that happens, an orange Download Error badge appears in the same spot instead of the gray Downloaded badge. Hovering over it shows when the attempt failed and why.

If you later retry the download and it succeeds, the badge switches back to the gray Downloaded badge; if a later attempt fails again, it switches back to orange. The badge always reflects your most recent attempt.

8.7 Downloading Multiple Files at Once

8.7 You can download several extractions in a single action instead of one at a time:

1. Check the checkbox next to each job you want, or check the checkbox in the table header to select every row.
2. Click **Download Selected**.

If exactly one available file is selected, it downloads directly, the same as clicking its individual **Download** button. If more than one is selected, the system bundles them into a single ZIP archive, along with a `readme.txt` file listing which extracts were included and, if any were skipped, why.

A file can be skipped from the bundle if it's still processing, failed, or was already removed/never found. If a job you selected shows Completed but its file turns out to be missing (for example, it aged past the one-year retention period), it's skipped from the ZIP and marked with the orange **Download Error** badge described above — so you can see at a glance which of your selected jobs weren't actually included, even after the ZIP finishes downloading.

If none of the files you selected are currently available, a popup lets you know instead of downloading an empty file.

8.8 Retrying a Failed Job

8.8 If a job shows a Failed status:

1. Click **View Error** to see what went wrong.
2. Click **Retry** to resubmit the job using the same parameters.

The retried job appears as a new Pending entry at the top of the list.

8.9 Downloading a Summary of All Jobs (CSV)

8.9 At the top of the page, you can export a summary of all your extraction jobs as a CSV file. Enter a filename in the text box and click Download All (CSV). This produces a spreadsheet listing each job's metadata (requested time, filename, status, completed time), which is useful for record-keeping.

This action downloads job metadata only — it does not bundle the actual extract output files.

8.10 Deleting Extractions

8.10 You can remove extractions from your list to keep it tidy. Deleting a record removes it from view but does not immediately delete the underlying file.

8.10.1 Delete a single extraction

8.10.1 Check the checkbox next to the row and click Delete Selected.

8.10.2 Delete multiple extractions

1. Check the checkbox in the table header to select all rows, or check individual rows.
2. Click **Delete Selected**.
3. Confirm the action in the dialog that appears.

8.10.2 Deleted extractions no longer appear in the list and their download links become inactive.

8.11 Tips

- If a job stays in Pending status for an extended time, it may indicate the background processing service is busy with other jobs. Large extractions covering many providers can take several minutes.
- You can safely navigate away from the page after submitting a job. The extraction continues in the background regardless of whether you stay on the page.
- If you need the same data again after a file has expired, return to Provider Search, recreate the same search criteria, and submit a new extraction from the Data Extractor.

9 Snapshot Reports

9.1 What Are Snapshot Reports?

9 Snapshot Reports are pre-built financial and operational summaries for a single provider. Each report presents a curated set of key metrics — such as costs, revenues, utilization, and bed information — drawn from that provider's Medicare cost report data for a selected fiscal year. The values you see are pre-calculated and stored by HFS, which means they load quickly and are consistent for all users viewing the same report.

Snapshot Reports are read-only. You cannot edit data or add custom fields.

9.2 Types of Snapshot Reports

9.2 There are two kinds of Snapshot Reports:

9.2.1 Dashboard Reports

9.2.1 A Dashboard Report focuses on a single provider and a single fiscal year. It displays data in a structured layout with labeled rows and numeric values. Some dashboard reports also include a chart (pie, bar, line, or doughnut) that you can switch between using a chart-type selector on the page.

9.2.2 Comparison Reports

9.2.2 A Comparison Report shows the same report metrics for a single provider across multiple fiscal years displayed side by side in columns. By default, four fiscal year columns are shown. You can configure between 2 and 6 columns through your user preferences.

Certain rows in a comparison report are marked as variance rows. These rows show the percentage change between the first (baseline) column and each subsequent column. Variance rows help you quickly see how a metric has grown or declined over time.

9.3 How to Get There

9.3 Snapshot Reports are accessed from the main navigation menu. Select the report category or report name that applies to your current system. The report loads automatically for the provider currently active in your session.

If you need to view a different provider, use the provider dropdown at the top of the report page.

9.4 How to Use a Snapshot Report

9.4.1 Selecting a Provider

9.4 Both dashboard and comparison reports show a provider selector dropdown near the top of the page. Choosing a different provider reloads the entire report for that provider. Fiscal year selections reset when you switch providers.

Next to the provider selector is a **My Provider List** dropdown that narrows the provider selector down to just one of your saved lists (or "All Providers"). See [My Provider List](#) for how to create lists. Your choice here is remembered — it's still selected the next time you come back to this page, and it's shared with Available Facility Reports and the Preferences page, so changing it on any one of those three carries over to the other two.

9.4.2 Selecting a Fiscal Year (Dashboard)

9.4.2 On a dashboard report, the fiscal year is determined by the fiscal year currently active in your session. To view a different year, update the active fiscal year using the standard fiscal year control available in the application header or user settings.

9.4.3 Selecting Fiscal Years (Comparison)

9.4.3 Each column in a comparison report has its own fiscal year dropdown. You can set each column to any available fiscal year for the selected provider independently. Changing any dropdown immediately reloads the

report with the new selection. The available fiscal years in each column always reflect the full history available in the HCRIS database for that provider.

9.5 What the Report Shows

9.5.1 Report Rows

9.5 Each row in the report represents a specific metric labeled on the left. The corresponding value appears to the right of the label. Common metric categories include:

- **Utilization** — bed counts, patient days, discharges, and occupancy rates
- **Costs and Expenses** — total costs, routine care costs, ancillary service costs, and capital costs
- **Charges and Revenues** — gross charges, net revenues, and Medicare/Medicaid revenues
- **Financial ratios and indicators** — cost-to-charge ratios, disproportionate share indicators, and similar summary metrics

The exact rows displayed depend on which report type is loaded. Each report template has a fixed set of rows defined by HFS.

9.5.2 Variance Rows (Comparison Only)

9.5.2 Rows shown as percentages (e.g., +5.23% or -2.10%) are variance rows. They express the change from the first column (the baseline year) to the column where the percentage appears. The first column never shows a variance value because it serves as the reference point.

9.5.3 Charts (Dashboard Only)

9.5.3 If a chart is included in a dashboard report, it appears alongside the data table. You can switch between chart styles (Pie, Bar, Line, Doughnut) using the dropdown above the chart. The chart reflects the same pre-calculated data shown in the table and does not recalculate when you change the chart type.

9.6 Downloading Associated Files

9.6 Each report period may have one or more associated CMS report files available for download, shown as links near the report title or in the column header area:

Link	What It Contains
MCR	The cost report data file in MCRX format (machine-readable)

PDF A formatted PDF version of the cost report

ECR An extended cost report file (available to HFS internal users only; may not appear for all accounts)

If a file is not available for a given period, the label appears grayed out rather than as a clickable link.

9.7 Available Reports by System

9.7 Which Snapshot Reports you see depends on the system currently active in your session. The same set of reports is shared across related sub-systems of the same cost report form (for example, 2552-10 and 2552-96 both use the 2552 report set).

9.7.1 System 2552 (2552-10, 2552-96)

9.7.1 Dashboard reports: Balance Sheet, CAH Dashboard, IP PPS Dashboard, IPF PPS, PPS Dashboard

Comparison reports: Bad Debt Report, DSH Summary, GME Summary, HIT Reimb. Settlement, IME Summary, Protested Amounts, Rehab LIP, Reimb vs. Cost Compare, S-10 Hosp. Uncomp., SCH/MDH, Settlement Summary, Wage Index

Some accounts also see a small set of additional dashboard reports (MN Report and related variants) restricted to internal HFS use.

9.7.2 System 2540

9.7.2 Dashboard reports: Dashboard

Comparison reports: Balance Sheet, S-7 Report, Settlement Summary

9.7.3 System 2088

9.7.3 Comparison reports: CMHC Report, Revenues and Expenses

9.7.4 System 1984

9.7.4 Comparison reports: Calc. of per diem cost

9.7.5 System 1728

9.7.5 Comparison reports: Settlement Summary

9.7.6 System 265

9.7.6 Comparison reports: Calc. for Bad Debt Reimb.

9.7.7 System 224

9.7.7 Comparison reports: FQHC Report, Settlement Summary

9.7.8 Systems 216 and 222

9.7.8 No Snapshot Reports are currently defined for these systems.

9.8 Limitations

- Reports cannot be customized. The layout and which rows appear are set by HFS.
- You cannot apply filters to a snapshot report. The only selection you make is provider and fiscal year.
- Comparison reports support a maximum of 6 fiscal year columns.
- Fiscal year comparisons are limited to years available in the HCRIS database for the selected provider.

10 Snapshot Reports

10.1 Overview

10 Snapshot Reports display pre-calculated financial and operational data for a selected provider and fiscal year. Reports are divided into two types:

- **Dashboard Reports** — single-report views with optional charts
 - **Comparison Reports** — side-by-side views across multiple fiscal years
-

10.2 Selecting a Provider and Fiscal Year

10.2 Both report types include dropdowns directly below the report title:

- **My Provider List dropdown** — narrows the Provider dropdown next to it down to just the providers in one of your saved lists, or to **All Providers** in every list you have combined. Leaving it on **All Providers** (the default) shows every provider in the system, same as before this option existed.
- **Provider dropdown** — switch to a different provider; the page reloads automatically. Only providers matching the My Provider List selection above appear here.
- **Fiscal Year dropdown** — select a different filing period; the page reloads automatically

For comparison reports, each column has its own fiscal year dropdown, allowing independent selection per

column.

Switching My Provider List while your currently selected provider isn't in the new list moves the selection to the first matching provider automatically. This selection isn't saved between visits — the page opens on **All Providers** again the next time you come back.

10.3 Downloading a CSV

10.3 Every snapshot report has a Download CSV button in the top-right toolbar.

10.3.1 What the CSV contains

10.3.1 The file always starts with 7 header rows that identify the report context — these are the same 7 fields added to every snapshot-style export/report in the app (Dashboard, Comparison, Rollup, Multi-Facility), so the header looks the same no matter which of these tools you're exporting from:

Row	Example value
Provider Number	010001
Provider Name	SOUTHEAST HEALTH MEDICAL CENTER
FYB	07/01/2024
FYE	09/30/2025
CR Status	As Submitted
HCRIS Creation Date	01/15/2025
NPR	03/01/2025

For **comparison reports**, these rows span all selected fiscal year columns, one value per column.

After the header rows, the report data follows — one row per label with its corresponding value or values.

If a label in the report data matches one of these 7 header labels, it is automatically omitted from the data section since the information is already captured in the header.

10.4 Downloading Comparison Files (MCR / PDF / ECR)

10.4 In comparison reports, each fiscal year column shows individual MCR and PDF download links (ECR is visible to HFS users only).

The label column at the same row also shows **All MCRX**, **All PDF**, and **All ECR** links. Clicking one of these

downloads a single ZIP file containing the corresponding file from every column that has one available. If only one column has a file for that type, the file is downloaded directly without zipping.

10.5 Known Limitations

- Report data cannot be customized by end users
- Layouts are fixed per report template
- Comparisons are limited to fiscal years; no other filters apply
- Maximum comparison columns: 6

11 Wage Data Analysis

11.1 What It Is

11 The Wage Data Analysis tool displays wage-related data for providers within a selected geographic area (CBSA — Core-Based Statistical Area), Reclassified CBSA, and fiscal year. It is intended for comparing average hourly wages and understanding how providers in a given area compare to the local CBSA average. The tool is read-only and does not generate extracts.

Reclassified CBSA is the CBSA a provider is paid at under CMS wage index reclassification rules — the same "ReCBSA" value shown in Snapshot Reports — which can differ from the provider's actual home CBSA. You can search by CBSA, Reclassified CBSA, and Fiscal Year independently, in any combination — for example, searching by Reclassified CBSA alone shows every provider reclassified into that area, regardless of where they're actually located.

A short description under the page title summarizes these rules as a quick reminder while you're using the page.

11.2 How to Access It

11.2 Select Wage Data by CBSA from the left-hand navigation sidebar.

11.3 How to Use It

11.3.1 Step 1 — Select a Fiscal Year

11.3 Use the Fiscal Year dropdown to choose the fiscal year you want to analyze. An All option is available to view data across all available fiscal years without date filtering.

A message below the form indicates the fiscal year end (FYE) date range that will be applied to the results.

11.3.2 Step 2 — Enter a CBSA Code or County Name (optional)

11.3.2 Click into the CBSA Code / County field and begin typing. After two characters, a suggestion list will appear showing matching CBSA codes and county names. Click a suggestion to select it.

To clear your CBSA selection, click the **X** button next to the input field — it stays empty when you submit, letting you search by Reclassified CBSA and/or Fiscal Year alone. (A first-time visit to this page still starts with a CBSA already selected, since a starting point is more useful than a blank page.)

11.3.3 Step 3 — Enter a Reclassified CBSA Code or County Name (optional)

11.3.3 Click into the Reclassified CBSA Code / County field and search the same way as the CBSA field above. This filters by the CBSA a provider is reclassified into for wage index purposes, rather than their actual location — useful for finding every provider reclassified into a specific area.

If you've already selected a CBSA, just click into this field to see the narrowed list of Reclassified CBSA codes actually seen paired with that CBSA — no need to type anything first. If your selected CBSA has no known pairings, clicking won't show anything yet; start typing to search the full national list instead, and you can still type any code directly.

A small number of legacy statewide rural-floor reclassification codes (2-digit codes) don't appear in the autocomplete suggestions, but can still be found by typing the exact code.

To clear your Reclassified CBSA selection, click the **X** button next to that input field.

11.3.4 Step 4 — Submit

11.3.4 Click Submit to load the wage data for your selection. A loading indicator appears while results are retrieved — a broad search (for example, a single fiscal year with no CBSA selected) can take several seconds to return.

Note: CBSA, Reclassified CBSA, and Fiscal Year are each optional, and any combination can be used together. However, if both CBSA and Reclassified CBSA are left empty, you must pick a specific Fiscal Year (not **All**) — searching with no filters at all would need to scan every provider in the system, so the page will ask you to narrow your search instead.

11.4 What the Results Table Shows

11.4 When results are found, the table displays one row per provider per fiscal year end:

Column	Description
Provider Number	The CMS Certification Number
Provider Name	The provider's name
Status	Report status for this fiscal year
Fiscal Year End	The fiscal year end date for this record
AHW	Average Hourly Wage
% Above/Below CBSA Avg	How far above or below the CBSA average this provider's wages fall

Expanding a row's detail also shows its CBSA and Reclassified CBSA (shown as "—" if the provider has no

reclassification on record for that year).

Results are sorted alphabetically by provider name, then by most recent fiscal year end first.

If your search matches no providers, an informational message is displayed. If your search doesn't include enough to safely run (see Step 4's note above), a different message asks you to narrow your search.

11.5 Downloading the Data

11.5 To export results to a CSV file, enter a filename in the field to the right of the search inputs and click Download CSV. The same CBSA, Reclassified CBSA, and fiscal year selections apply to the download, and the file includes a Reclassified CBSA column alongside CBSA. The same loading indicator appears while the file is being generated.

11.6 Tips

- The CBSA and Reclassified CBSA inputs both accept either a numeric CBSA code or a county/city name for autocomplete suggestions.
- Selecting **All** for the fiscal year is useful when you want to see a provider's full wage history within a CBSA (a CBSA or Reclassified CBSA selection is still required in that case).
- This tool reflects the current state of CMS-published data in HCRIS and is updated as CMS releases new data.
- Results are not paginated. A broad search (e.g. a single fiscal year with no CBSA) can return thousands of rows in one scrollable table.

12 Multi-Facility Report

12.1 What Is the Multi-Facility Report?

12 The Multi-Facility Report displays a pre-defined set of financial and operational metrics in a side-by-side table where each column represents a different provider and fiscal year. Unlike the Rollup Report, which averages a group of providers, the Multi-Facility Report shows each facility's individual values so you can compare them directly against one another.

This tool is useful for detailed, provider-by-provider comparisons — for example, reviewing cost-per-discharge, total revenues, or utilization metrics across several specific facilities at the same time.

12.2 How to Get There

12.2 The Multi-Facility Report is accessible from the main navigation menu. The page loads with a default set of columns based on the providers and fiscal years available in your session.

12.3 How to Use the Report

12.3.1 Selecting a Report Type

12.3 At the top of the page, a dropdown allows you to choose which report to display. The available reports depend on your licensed system and may include different summaries of cost report data. Selecting a different report immediately reloads the page with the new report's rows and values.

12.3.2 Setting Each Column

12.3.2 The report table has multiple columns, each representing one provider and fiscal year pair. At the top of each column are two dropdowns:

1. **Provider** — Select the facility to show in this column. Changing this selection reloads the entire report immediately.
2. **Fiscal Year** — Select the fiscal year for the chosen provider in this column. Changing this selection also reloads the report immediately.

Each column is independent. You can mix providers and fiscal years freely across columns.

12.4 What the Report Shows

12.4.1 Identifying Rows

12.4 The first 7 rows always identify each column's provider and fiscal year — Provider Number, Provider Name, FYB, FYE, CR Status, HCRIS Creation Date, and NPR — one value per column. Unlike the Rollup Report, these rows are always shown; there's no "Show text fields" toggle to hide them here.

12.4.2 Report Rows

12.4.2 Each row represents a specific metric. The row label appears on the left side of the table. The corresponding value for each column's provider and fiscal year appears in the right-aligned cells.

Rows may include:

- **Utilization** — licensed beds, patient days, discharges, occupancy
- **Costs** — total operating costs, routine and ancillary care costs, capital expenses
- **Revenues and Charges** — gross charges, net patient revenues, Medicare and Medicaid revenues
-

The exact rows depend on which report type is selected.

12.4.3 Variance and Percentage Rows

12.4.3 Some rows display values as percentages (e.g., 12.50%). These rows are designed to show a ratio or rate rather than an absolute dollar or count figure.

12.4.4 File Links per Column

12.4.4 Below the provider and fiscal year dropdowns in each column header, there is a row of file links. When a cost report file is available for that provider and fiscal year, the link is clickable:

Link	What It Contains
MCR	The cost report data file in MCRX format
PDF	A formatted PDF version of the cost report
ECR	An extended cost report file (available to HFS internal users only; may not appear for all accounts)

Grayed-out labels indicate that no file is available for that type and period.

12.5 Downloading the Report

12.5 A Download CSV button and a filename field appear near the top right of the report. The filename is pre-filled with a suggested name that you can change. Click Download CSV to export the full report table — all visible rows and columns — to a comma-separated values file. The same 7 identifying rows shown on screen (Provider Number, Provider Name, FYB, FYE, CR Status, HCRIS Creation Date, NPR) are always included first, one column per provider/fiscal-year pair.

12.6 Limitations

- The number of columns available is fixed by the report configuration. You cannot add or remove columns.
- All data is read-only. No values can be edited in this view.
- The report reflects pre-calculated values stored in the HCRIS database. Values are not recalculated on demand.
- If a provider has no data for the selected fiscal year, the cells for that column will appear blank.

13 Rollup Report

13.1 What Is the Rollup Report?

13 The Rollup Report compares a single provider's cost report data against an average calculated from a group of other providers that you select. It shows three columns side by side for each metric in the report: the individual provider's value, the average value across your selected group, and the percentage variance between them.

This tool is useful when you want to benchmark a facility against peers — for example, comparing a hospital's cost structure against similar facilities in the same state, of the same bed size, or with the same provider type.

13.2 How to Get There

13.2 The Rollup Report is accessible from the main navigation menu. It opens with two tabs: Report and Provider Group. You use the Provider Group tab to build the comparison group, then switch to the Report tab to view results.

13.3 Step 1 — Build Your Provider Group

13.3 Click the Provider Group tab.

The Provider Group tab gives you two search tools to find providers:

- **Quick Search** — Enter a provider number or name to find a specific facility quickly.
- **Advanced Search Filters** — Apply filters such as state, city, bed size, type of hospital, DSH indicator, CAH status, fiscal year, and report status to find a set of providers that match your criteria.

After entering your search criteria, click the search button. The results appear in a table below the filters, sorted by provider number, then by fiscal year end (most recent first), then by report record (most recent first) — so if a provider has several cost report periods in your results, its own rows are grouped together with the newest at the top.

Important: Providers shown in the search results are not automatically added to your comparison group. You must explicitly select them.

13.3.1 Spotting the Report You're Comparing Against

13.3.1 If the cost report period you selected on the Report tab (Provider + Snapshot/FY) also shows up in your Provider Group search results, that row is highlighted and labeled with a Comparing badge — a quick way to

confirm whether you're accidentally comparing a provider against a group that includes itself. This is purely informational: the row is still a normal, selectable row in the group.

13.3.2 Adding Providers to the Group

- Check the box next to any provider in the results table to add that cost report period to your group.
- To add all providers shown on the current page, click **Add All Page Results**.
- If results span multiple pages, use the page selector dropdown to navigate between pages and continue adding providers from additional pages.

13.3.2 The badge labeled Group Providers Selected at the top of the Report tab shows how many report periods are currently in your group. This count updates as you add or remove providers.

13.3.3 Removing Providers from the Group

13.3.3 Uncheck the box next to any provider to remove it from the group. To remove all providers at once, click Clear Complete Group.

Your selected group persists as you navigate between the two tabs on this page.

13.3.4 Downloading the Search Results

13.3.4 Next to Add All Page Results and Clear Complete Group is a filename field and a Download List (CSV) button. This downloads every provider matching your current Provider Group search — not just the providers you've added to your group, and not just the current page — as a CSV file. The filename field is pre-filled with a default name you can change before downloading.

13.4 Step 2 — View the Report

13.4 Click the Report tab.

13.4.1 Configuring the Report

13.4.1 At the top of the Report tab, set the following:

Field	Description
Report	Select which snapshot report to display (the available reports depend on your licensed system) Narrows the Provider dropdown below to just the providers in one of your saved lists, or to All My Provider List Providers in every list you have combined. Leaving it on All Providers (the default) shows every provider in the system.
Provider	Select the individual provider whose values appear in the "Provider Value" column. Only providers matching the My Provider List selection appear here.

Snapshot / FY Select the fiscal year for the selected provider

Click **Update Report** to load the results.

Switching My Provider List while your currently selected provider isn't in the new list moves the selection to the first matching provider automatically. This is a separate list filter from the one on the **Provider Group** tab — narrowing your primary provider here doesn't affect who can be added to the comparison group, and vice versa. Neither selection is saved between visits.

13.5 What the Report Shows

13.5 The first 7 rows of the table always identify the report you're viewing — Provider Number, Provider Name, FYB, FYE, CR Status, HCRIS Creation Date, and NPR — shown as text (no group average is computed for these, since they identify the report rather than measure something). Like any other text row, they disappear if you uncheck "Show text fields" and reappear when you check it again.

The report table has four columns:

Column	Description
Label	The name of the metric (cost category, utilization measure, or financial indicator)
Provider Value	The value for the selected provider in the selected fiscal year
Group Average (n=N)	The average of the same metric across all N cost report periods in your selected group
Variance	The percentage difference between the provider value and the group average

A positive variance means the provider's value is higher than the group average. A negative variance means it is lower. The direction of what is "better" or "worse" depends on the metric being reviewed — for example, lower costs per discharge compared to peers may be favorable, while lower revenues may warrant further review.

The report title area also shows file download links (MCR, PDF, ECR) for the selected provider's cost report, when those files are available.

13.6 Downloading the Report

13.6 When the report is loaded, a filename field, a format dropdown, and a Download button appear below the group count badge. The filename field is pre-filled with a default name you can change; its file extension updates automatically to match whatever format you pick.

The dropdown offers two groups, each available in CSV, Excel, and PDF:

- **Rollup Summary** — the same four columns shown on screen: Label, Provider Value, Group Average, and Variance.
- **Rollup Summary with Specifications** — the same four columns plus a fifth **Specification** column describing exactly how each row is calculated (the underlying worksheet line/column references).

Click **Download** to export. The same 7 identifying rows shown on screen (Provider Number, Provider Name, FYB, FYE, CR Status, HCRIS Creation Date, NPR) are included first in the file — but only when "Show text fields" is checked, matching what's currently shown on screen.

13.7 Tips

- If the Group Average column shows blank values, the metric may not be available for the report periods in your group. Check that the group members share the same form type (e.g., CMS-2552 or CMS-2540) as the selected provider and report.
- The group you build stays active only for your current session. If you navigate away from the Rollup Report page, your group selection is not saved.
- Changing the selected provider or fiscal year does not change your group. Those two selections are independent.

14 Provider Map

14.1 What It Is

14 The Provider Map displays hospitals and Critical Access Hospitals (CAHs) as interactive pins on a geographic map of the United States. You can browse provider locations visually, search by provider number, filter by provider type, and click any pin to view detailed provider data including wage index values, PPS base rates, and SSI information.

You must be logged in to access the Provider Map.

14.2 How to Access It

14.2 Select Provider Map from the left-hand navigation sidebar.

14.3 Reading the Map

14.3 The map opens centered on the contiguous United States. Two types of providers are shown as colored pins:

- **Teal pins** — Standard hospitals
- **Amber pins** — Critical Access Hospitals (CAH)

Hovering over a pin enlarges it so it is easier to click when pins are close together.

14.4 Controls (Left Panel)

14.4.1 Search by Provider Number

14.4 Type a provider number (up to 6 digits) into the Search by provider number field and click Search. The map hides all pins that do not start with the digits you entered, making it easy to locate a specific provider or group of providers that share a provider number prefix.

14.4.2 Show/Hide Provider Types

14.4.2 Use the checkboxes to show or hide each provider type on the map:

- **Hospital** — toggles blue hospital pins
- **CAH** — toggles red Critical Access Hospital pins

14.4.3 Show County Boundaries

14.4.3 Check the Counties checkbox to overlay U.S. county boundaries on the map. Hovering over a county will display county information in the panel below the checkboxes, including:

- County name and state
- CBSA code
- Rural/Urban designation
- Wage Index
- GAF (Geographic Adjustment Factor)
- Reclassified Wage Index and GAF
- Outmigration Adjustment

14.4.4 Reset

14.4.4 Click Reset to clear the provider search, re-enable all provider types, hide county boundaries, and restore the map to its full view.

14.5 Viewing Provider Details

14.5.1 CAH Providers

14.5 Click any red CAH pin to open a popup showing:

- Hospital name
- Provider type
- City and state
- Provider number

- Number of beds

14.5.2 Hospital Providers

14.5.2 Click any blue hospital pin to open a popup showing detailed data. Use the year dropdown in the popup header to select a filing year and view the corresponding values:

- Provider number and name
- City, state, and CBSA
- Reclassified CBSA
- Quality Reduction and EHR Reduction percentages
- Wage Index
- PPS Base Rate (labor, non-labor, and total)
- Hospital Readmission, VBP, and HAC adjustment factors
- Outmigration Adjustment
- DSH Uncompensated Care Payment Amount
- GAF and GAF Adjusted Capital Rate

The popup also includes an **SSI (Supplemental Security Income)** panel on the right side showing SSI ratio values by year.

A clipboard icon in the popup header lets you copy all the displayed data to your clipboard.

14.6 Tips

- If you are looking for a specific provider, use the provider number search rather than scanning the map visually — especially in densely populated areas where pins overlap.
- The county boundary overlay is useful when you want to understand the geographic context of a CBSA or when analyzing wage index variation across county lines.
- Hospital popup data changes when you select a different year from the year dropdown. SSI data does not change with year selection.
- You can have only one provider popup open at a time. Clicking a new pin automatically closes the previous popup.

15 My Provider List

15.1 What It Is

15 My Provider List lets you build and maintain personal collections of providers for quick reference. You can create multiple named lists, add or remove providers, mark favorites, and use your lists as a filter in other tools. Lists are saved to your account and available each time you log in.

15.2 How to Access It

15.2 Select My Provider List from the left-hand navigation sidebar.

15.3 Working with Lists

15.3.1 Switching Between Lists

15.3 Use the Provider List dropdown at the top of the page to switch between your saved lists. Each list name shows the total number of providers it contains.

15.3.2 Creating a New List

15.3.2 Click the New List button. Enter a name for the list when prompted and click OK. You will be taken directly to your new, empty list.

15.3.3 Viewing Your Providers

15.3.3 Your providers appear in a table with the following columns:

Column	Description
Checkbox	Select providers for deletion
Star (★)	Mark or unmark a provider as a favorite
Provider #	The CMS Certification Number
System	The HCRIS system the provider belongs to (e.g., Hospital, SNF)
Provider Name	The provider's name
City	The provider's city
State	The provider's state
Latest HCRIS	The date of the most recent HCRIS filing on record

15.4 Managing Providers in a List

15.4.1 Adding a Provider

15.4 Click the three-dot menu (⋮) next to the New List button and select Edit List. An editing panel slides open at the top of the page. Use the Add Provider dropdown to select a provider by name and click Add.

15.4.2 Marking Favorites

15.4.2 Click the star (★) next to any provider to mark it as a favorite. The star turns yellow. Favorited providers sort to the top of your list the next time the page loads, so your most important providers are always easy to find.

15.4.3 Removing Providers

15.4.3 Check the box to the left of one or more providers you want to remove. A red Delete link will activate in the table header. Click it and confirm the prompt to remove the selected providers from the list. You can also use the master checkbox in the header row to select all providers at once.

15.4.4 Renaming a List

15.4.4 Open the three-dot menu (⋮) and select Edit List, then use the Rename List field to enter a new name and click Rename.

15.5 Importing and Exporting

15.5.1 Exporting a List to CSV

15.5 Enter a filename in the field next to the Download CSV button and click the button. Your browser will download a CSV file containing all providers in the current list.

15.5.2 Importing a List from CSV

15.5.2 Open the three-dot menu (⋮) and select Import List. Select a CSV file from your computer. The system reads provider numbers from the file, validates them, and adds the matching providers to the current list. If the file contains providers from a different system than the list's original system, the list designation is updated automatically to reflect that it now contains providers from multiple systems.

15.5.3 Deleting a List

15.5.3 Open the three-dot menu (⋮) and select Delete List. Confirm the prompt. The list and all its provider associations will be permanently removed.

15.6 System Highlighting

15.6 The list display shows all providers regardless of which HCRIS system is currently active. Providers that belong to your currently active system appear in full, while providers from other systems appear slightly dimmed. This lets you keep a mixed list without losing track of which providers are relevant to your current work.

15.7 Tips

- A single list can hold providers from multiple HCRIS systems. This is useful if you track providers across both Hospital and SNF data, for example.
- Use the favorites feature to keep your most-used providers at the top of a long list.
- Lists created here can be used as a **My Provider List** filter in several other tools, narrowing their provider selection down to just one of your saved lists (or all of them combined): Advanced Search, Snapshot Reports (both Dashboard and Comparison views), Rollup Report's primary-provider picker, and Available Facility Reports.
- Your **My Provider List** choice is now remembered on Snapshot Reports, Available Facility Reports, and the Preferences page — pick a list on any one of those three and it's still selected the next time you visit any of them (they all share the same choice). Advanced Search and Rollup Report's Group Search tab remember their own choice separately. Rollup Report's own primary-provider picker is the one place that still resets to "All Providers" each visit.

16 User Settings (Preferences)

16.1 What It Is

16 User Settings lets you customize your experience in HFS HCRIS. Your preferences are saved to your account and restored automatically the next time you log in, so you do not need to reconfigure them each session.

16.2 How to Access It

16.2 Click Settings in the top navigation bar, then select Preferences from the dropdown menu.

16.3 What You Can Configure

16.3.1 Theme

16.3 Choose a display theme: Light, Dark, Blue, or Gray. The theme applies across all pages and tools immediately after you make a selection — no Save button is required.

16.3.2 Font Size

16.3.2 Choose a text size: Small, Normal, Large, or Extra Large. This works independently of the theme — you can pair any font size with any theme. Font size applies across all pages and tools immediately, with no Save button required. Normal is the default.

16.3.3 Comparison Report Columns

16.3.3 Set how many comparison columns appear in Snapshot Comparison Reports. The default is 4. You can increase or decrease this depending on how many time periods you want to compare side by side.

16.3.4 System

16.3.4 Select your default HCRIS system (for example, Hospital 2552-10 or SNF 2540-10). The system you choose determines which providers, reports, and data are available throughout the application. Changing the system reloads the provider list and resets system-specific preferences.

16.3.5 Provider

16.3.5 Select your default provider within the chosen system. This is used as the default in Snapshot Reports and other tools that operate on a single provider at a time. You can change the provider at any time.

16.3.6 Fiscal Year

16.3.6 Select the default fiscal year for your active provider. This is used by Snapshot Reports and comparison tools as the starting reference point.

16.3.7 My Provider List

16.3.7 Narrow the Provider dropdown above to just one of your saved provider lists (see the My Provider List guide), or leave it on All Providers (the default for a new user). This is the same selection Snapshot Reports and Available Facility Reports use — changing it here, or on either of those pages, updates all three, since it's one shared setting rather than a separate one per page. If your currently selected provider isn't in the list you switch to, your provider selection is updated automatically to the first provider in that list.

16.3.8 Allow Duplicate Rows on Custom Extract Specification Import

16.3.8 Controls what happens when you import a CSV, TXT, or CSDX file into a Custom Extract Specification (see the Data Extractor guide's Custom Extracts section) and a row in the file matches one already in the specification (same worksheet, program, provider, line, column, and reclass code). This is checked by default, meaning duplicate rows are imported anyway. Uncheck it if you'd rather have matching rows skipped automatically during import — any skipped row is listed in the import results so you can see what was left out.

16.4 How Changes Are Applied

16.4 All settings on this page take effect immediately when you make a selection — there is no separate Save button. Changes are stored to your account and will be in effect the next time you log in.

16.5 Tips

- If you work with multiple systems regularly, remember that provider, fiscal year, and My Provider List selections are tracked separately per system. Switching systems will restore the last provider, fiscal year, and provider list you used for that system.
- My Provider List is the one setting on this page shared with other tools by design (Snapshot Reports and Available Facility Reports) — changing it anywhere updates it everywhere.
- The theme and font size settings are both global and apply the same across all systems.
- Your sidebar expanded/collapsed state is also saved automatically and does not need to be configured here.

17 Provider Notifications

17.1 What It Is

17 Provider Notifications lets you get an email notification when any of your selected providers get updated with new data, and lets you run a report right now listing any new data for those providers — without waiting for an email.

17.2 How to Access It

17.2 Click Settings in the top navigation bar, then select Provider Notifications from the dropdown menu.

17.3 Activating Notifications

17.3 At the top of the page, the Activate notifications switch turns email notifications on or off. This is a single on/off setting for your account — turning it off does not clear your provider selections below, it just pauses the

emails.

17.4 Choosing Which Providers to Watch

17.4 The page has two boxes:

17.4.1 My Provider List

17.4.1 Every provider list you've created (see My Provider List) appears here with a checkbox. Checking a list's box includes every provider currently in that list. If you add more providers to the list later, remember to re-check the box so the new providers are included too.

17.4.2 Individual Providers

17.4.2 Providers you've added one at a time, not as part of any list. Each has its own checkbox.

To add one:

1. Click the **+** button in this box's header. An inline form appears (no popup) with a **System** dropdown, a **Provider** search box, and an **Add** button.
2. Choose the system the provider belongs to (for example, Hospital 2552).
3. Click into the **Provider** box to see the full list of providers for that system, or start typing a number or name to narrow it down.
4. Select the provider and click **Add**.

If the provider is already on your list, a message appears in red under the form instead of the page closing or reloading — just pick a different provider or start typing again to clear the message.

Click the **×** next to any individually-added provider to remove it.

17.5 Downloading the Selected Providers

17.5 The Download CSV button (top of the page) downloads a file listing every provider you currently have checked — from both boxes — along with which list (or "Individually Added") each one came from. This works whether or not notifications are activated.

17.6 Run New Data Report Now

17.6 Next to Download CSV, Run new data report now lets you generate a report immediately instead of waiting for an email:

1. Choose a file format from the dropdown — CSV, Excel, or PDF.
2. Click **Create Report**.

The report lists only the checked providers whose data changed in the **most recently published** CMS quarterly release — so if a provider hasn't had any new data yet, it simply won't appear in the report. This report is generated on the spot and downloaded directly; it does **not** get added to your Extract Archive.

Each row shows: Provider Number, Provider Name, City, State, FY Beginning, FY End, HCRIS Created, NPR, System, and Status. The report header shows the site version and the CMS published date for context.

17.7 Tips

- Checking a My Provider List's box applies to every provider in that list at the time you check it — providers added afterward need the box re-checked to be included.
- The "Run new data report now" button always uses your current checkbox selections, regardless of whether **Activate notifications** is turned on, since you're asking for the report yourself.
- Use **Individual Providers** for one-off providers you want to watch that don't belong to (or don't need to be added to) one of your provider lists.

18 Exporting Data

18 Most search results and reports throughout HCRIS - Advanced Search, Snapshot Reports, Wage Index Analysis, Multi-Facility Report, Rollup Report, and the Data Extractor - can be downloaded as a file to keep, share, or open in another program.

18.1 Available Formats

18.1 Depending on the screen, you can export to:

- **CSV** - opens in Excel or any spreadsheet program; best for further analysis or importing into another system.
- **Excel** - a formatted spreadsheet with titles and column headers already styled.
- **PDF** - a print-ready document, useful for sharing a snapshot of what you're looking at.

Not every screen offers every format - available options depend on the type of data being exported.

18.2 File Names

18.2 Downloaded files are named automatically using a consistent pattern that includes the tool you exported from and the date, so files from different screens or days don't get mixed up in your downloads folder. On screens that support it, you can type your own name in the file name box before downloading if you'd rather choose it yourself.

18.3 Where to Find Your Exports

- A direct export (such as a single report's CSV button) downloads immediately through your browser.
- A larger export from the Data Extractor is processed in the background and appears in **My Extractions**, where you can download it once it's ready - see the My Extractions and Data Extractor sections of this manual.

19 FAQs

19.1 Frequent questions about HFS HCRIS website

19 Support → FAQs

A page of frequently asked questions about the HCRIS system and the data it presents, shown as an expandable list — click a question to reveal its answer, click it again to collapse it. Covers:

- **Will other form sets be added to the website?** — what's on the roadmap next (2540-96/2540-10, 1728-94, 265-94/265-11).
- **Why pay for this when CMS gives the data away for free?** — what HFS HCRIS adds on top of the raw CMS Public Use Files: a searchable database, recreated MCR/PDF cost reports, and curated "Snap Shot" summaries.
- **Re-created Cost Report Differences** — known, documented discrepancies between a recreated report and the original filing (e.g. certain Worksheet D offset amounts, a missing E-4 in some early filings, timing differences between filing and data release, and some early filings showing the home office state as a number instead of an abbreviation).
- **Why does the CMS report count differ from the HFS HCRIS report count?** — HCRIS keeps every version of a report it has ever received, even ones CMS later overwrites or removes, so the two counts can diverge over time.

If a question isn't answered there, use **Support** → **Contact Us** to reach the team directly.

20 Useful Links

20.1 Resource links and manuals.

20 Support → Useful Links

A page of external reference documents and resources related to Medicare cost reporting and CMS data — kept separate from the FAQ since these are files/pages hosted outside the HCRIS system rather than answers to questions. Each entry opens the referenced document or site directly:

Link	What it is
State Operations Manual – Provider Certification	CMS's manual covering provider certification requirements and survey procedures
Medicare State Code Listing	Reference list mapping Medicare state codes used throughout cost report data
CMS HCRIS Data Release Information	CMS's own page describing its HCRIS data releases — the source data this site is built on
CMS Hospital 2010 Documentation (including README)	CMS's documentation package for the Hospital 2010 (2552-10) cost report form, zipped with its README
2552-85 & 2552-92 Converted HCRIS MDS Files	Legacy cost report data (older 2552-85/2552-92 form versions) converted into modern HCRIS MDS file format

If you have a resource you think belongs here, use **Support** → **Contact Us** to suggest it.

21 Reports Statistics

21 Support → Report Statistics (also available from the left sidebar as "Reports Statistics")

System-wide report counts and status breakdowns. One **System** dropdown and one **Version** (quarter) dropdown sit above three tabs and apply to all of them:

- **System** — a specific licensed system, or **All** to see every system you're licensed for combined.
- **Version** — the published quarter to report as of. Defaults to the most recent quarter.

Changing **Version** refreshes everything on the page. Changing **System** refreshes the per-provider drill-down lists and the By Status tab, but not the Overview/Notes totals tables (those always show every system side by side).

21.1 Overview tab

21.1 Shows a table of report counts per system for the selected quarter:

Column	Meaning
System	The licensed system (or a blank/Total row used as a visual separator/grand total)
Added	Reports newly received in this specific quarter
Total	The running total of reports as of this quarter

Selecting a specific system (instead of "All") replaces this table with a paged, sortable list of that system's individual provider reports — Provider, Fiscal Year Begin, Fiscal Year End, Status, NPR, HCRIS Creation Date, Utilization, and MCR/PDF/ECR download links (**ECR links are visible to HFS staff only**). Click a column header to sort by it; click again to reverse the sort order. Selecting **All** again returns you to the totals table.

Export: **Download CSV** (button above the tabs) exports whichever table is currently showing — the totals table, or the drill-down list if a system is selected.

21.2 Notes tab

21.2 Shows the same per-system layout as Overview, but counts only reports that HFS staff have flagged with a note (the same note field used on the Available Facility Reports page's File Flags column). "Added" and "Total" here reflect notes, not new reports — a report's "Total" count carries forward into every later quarter once it has a note, even if the note itself was added long after that report was originally received.

Selecting a specific system drills down the same way as Overview, except the list shows Provider, Fiscal Year End, Status, NPR, HCRIS Creation Date, the **note text itself**, and MCR/PDF/ECR download links (ECR is HFS-staff only). There's no Fiscal Year Begin or Utilization column here. Sortable and exportable the same way as the Overview drill-down.

21.3 By Status tab

21.3 Shows report counts by status — As Submitted, Settled without Audit, Settled with Audit, Reopened, Amended, Most Recent Changes — across the last 8 published quarters (or fewer, if the selected system doesn't have 8 quarters of history yet), as both a table and a bar chart. Only statuses that actually have reports in that window appear as rows.

This tab has no drill-down — it's a summary view only. Export via **Download CSV**.

21.4 Downloading Files

21.4 MCR/PDF download links appear directly in the Overview and Notes drill-down lists once you've selected a specific system. ECR links are visible only to HFS staff. There is no PDF export button on the page for the drill-down lists — only CSV.

21.5 Tips

- If you're looking for a report count breakdown across systems, stay on **All** — switching to a specific system replaces the totals table with that system's own provider-level list.
- Notes "Total" is cumulative (it includes every note-flagged report received up to and including the selected quarter), while "Added" is specific to that one quarter.
- Use the sortable column headers on the drill-down lists to quickly find a particular provider or fiscal year without scrolling through the full list.