

Manage Recurring Data Snapshots

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Data Snapshots is a service provided by CollaborateMD which takes current data such as patient demographics, codes, appointments, payers, provider list, facility, charge, etc. and captures (exports) a snapshot of the data. The data can be exported into several hundred files in **.DAT** format that is a tab-delimited or into an open-source relational database management system (RDBMS) known as **MySQL**.

 **The export includes Data Sets from the following sections of the application:**


Authorizations, Activity, Appt, Appt Types, Charge, Professional Claims, Claim Status, CPT Code, Credit, Facility, ICD Code, Location, Patient, Patient Notes, Payor, Practice, Provider, Referring, Remittance, Resources, Claim ICD Codes, ICD Procedure Codes, Institutional Claims, Insurance Parties, Insurance Policies, Payments, Insurance Check, Inventory Codes, Revenue Codes, and more.

If you're the Auth Rep, follow the steps below to enable, configure or disable Recurring (daily) Data snapshots:

1. Select **Account Administration > Services**.
2. Click the **button** next to Recurring Data Snapshots
3. The **Enable Recurring (Daily) Data Snapshots** box enables or disable this service.
4. Under **Recurring Snapshot Settings**, select the:
 1. **Format**: Select the format you would like the data snapshot to be exported in.

 Click the **Download Sample** link to view a sample of what the snapshot will look like before purchasing. The sample will contain the first five (5) rows of each data file set contained within your account.

Recurring Data Snapshot for Account #462134 - CollaborateMD

 Usage of this feature will result in additional charges to your invoice. [Click here](#) for complete pricing information.

Enable recurring (daily) data snapshots

Format

Default



[Download Sample](#)


1. **Default (Tab delimited).**
2. **MySQL.**

2. **Select the customer(s) to include in the data snapshot** If you have more than one customer account, check the box(es) next to the customer(s) you would like to schedule the snapshot for.

3. **Export multiple customers as:**

1. **One Combined File:** Exports the snapshot as one combined file for all selected customers
2. **One File per Customer:** Exports the snapshot as one separate file per each selected customer.

5. Click **Save**.

 **Data Snapshots are overwritten each day.** Please make sure you download before the next Data snapshot is generated. Auth Reps will receive confirmation and instructions on downloading the data snapshot(s) via the Messaging section of the application.

Limitations:

- **No specific dates** (past or present) can be captured within the export. The data snapshot will **run at 1:00 AM EST on the scheduled day**, therefore the date must be a future date.
 - **No specific criteria** (e.g., ONLY Patient data set info) can be captured, as the **Data Snapshots capture all of the data sets specified** above.
 - Document Imaging is **NOT** included.
 - The data can only be used to import into other software solutions (e.g., Business Intelligence, Collections, etc.).
 - In accordance with HIPAA rules and regulations, CollaborateMD will **NOT** provide users, admins, or third-party vendors this information, as the Data Snapshots contain PHI & PII.
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