CPT Smart App Overview Agenda

1. Brief introduction of the CPT Smart App
2. Recent CPT Smart App updates and current status
3. How to find the CPT Smart App and “invitations” to applications
4. CPT Smart App major functionality review and Common Questions
5. Support information
6. Questions
CPT Smart App – October 3rd webinar session

- The Webinar hosted on October 3rd focused on high-level goals, objectives, and features of the Smart App.

- The entire recording can be found on the AMA site via the “Code Change Applications” page https://www.ama-assn.org/practice-management/cpt/cpt-code-change-applications
What is the CPT Smart App?

• A streamlined, modern, and efficient platform that allows applicants to submit CPT Code Change Applications for the CPT Code Change application process

• The CPT Smart App provides the applicant with:
  • Better control of the application process with guidance for new submitters
  • Quick access to currently published CPT codes with easy-to-use redlining tools for changes
  • Intuitive question flow and integrated help prompts to aid in application completion
  • Online required forms for quicker and easier compliance
  • Easier reference and citation uploading
  • Consolidated application management
CPT Smart App Status

- Open for all applicants for Code Change Applications for February 2020 meeting
  - PLA uses separate application
  - Category II codes still use the paper application
- Submission deadline for the February 2020 meeting is November 6\textsuperscript{th}
- CPT Smart App now has the 2020 data!
- Feedback welcomed!
- Still making enhancements and modifications now that we’re in full production mode and application is getting more use
Key updates from user feedback

• Deleting Applications via the dashboard
• Ability to add attachments via Control Panel
• Updated language in “Invitation” email
• Creating an application is now specific to current organization (for applicants with multiple orgs)
• Ability to select multiple options (drug, device, vaccine) in Cat1Long FDA question
• Applicant ability to edit Citations
• Show code association to attachments in Word doc
• Display ad-hoc attachments in new Word doc section
• Applicant email notification 3 days before due date
• Adding applicant withdrawal rationale to message sent to Staff
Getting to the CPT Smart App

1. Direct URL: http://cptsmartapp.ama-assn.org


3. Sign in with your AMA credentials
   1. If you’ve submitted applications in the past or have accessed the CPT Collaboration site, the same credentials will be valid
   2. Or create a new AMA account
      1. It’s free and easy to create an account—you don’t need to be a member!
If you are invited to be an applicant

1. You’ll receive an email from the person who invited you

2. The email will have link to that application with the instructions for:
   1. First-time and returning user log ins
   2. What to do once you log in and how to find the application you were invited to
   3. How to complete legal/COI information and sign any attestations

[AMA SmartApp] You have been added as an applicant to CPT Code Change Application

CPT Submissions <ccappsmitg@ama-assn.org>
to me

Dear CPT Applicant/Preparer,

You have been identified as an applicant for the following CPT code change application: "test US Pop in illi".

To be included as an applicant for "test US Pop in illi", please click on the CPT website link below:

https://cptsmartappstest.ama-assn.org/join/App/a625481b4f60abea076c62fa96e263fa7baa0a81c3875e8ad48f33a6eb-33095d4 (Do not sha

Once you click on the link you will be directed to the AMA CPT Smart App’s secure login page where you can use your existing AMA credentials.

- Don’t have an AMA account? Select “Create a free account” and follow the instructions on the screen.
- Forgot your username or password? Click “Forgot Username or Password” to recover your information.

If you are a first time Smart App user:

1. After successfully logging in, you must agree to the terms and conditions presented and enter your Smart-App profile information.
2. Once completed, your personal Smart App Dashboard will display, where you can then open the application that you were added to.
3. Click the “Edit” button on the application Control Panel to complete Legal and Conflict of Interest attestations and to revise the applica

If you are a returning Smart App user:

1. After successfully logging in, the application’s Control panel will display.
2. Click the “Edit” button to complete the digital Legal and Conflict of Interest attestations and to revise the application.

Prior to the Panel Meeting, every Applicant and Presenter will receive a separate email containing a DocuSign Statement of Compliance with the recei

For assistance, contact AMA Staff at ccappsmitg@ama-assn.org

CPT Editorial Processes
American Medical Association
CPT Smart App Major Functionalities & Common Questions
Profile Page

• First Name, Last Name, Email are pre-populated with your AMA information and are not editable
• All fields are required
• The organization that is currently entered will be tied to any new applications that you create or that you are invited to
• Your full name and organization will be appended to all application attestations
• All profile information will be appended to each Code Change Application document
Dashboard

- Training materials
- Overview of CPT and the Smart App
- Announcements and important dates
- Choosing your application
  - Ability to delete un-submitted applications
  - You can only see applications you’ve created or that you’ve been invited to
  - No one else will see your applications (unless you invite them) until you submit
Choosing your role

- Both Applicants and Preparers can prepare applications
  - Preparers could be a Staff Member or other individual assisting an Applicant
- An Applicant must be associated to an application prior to submission
- All Applicants and Preparers must still comply with CPT Legal Policies
- Applicants and Preparers do not necessarily need to present at the Panel Meeting
  - Presenters can be added closer to the meeting date, after signing Confidentiality forms
Navigating within an application

- Left Nav is key to navigation
  - Shows various chapters in application
    - Applicant cannot jump from question to question, due to conditional questions
    - For questions that require a response for each new or revised code, the application will prompt the applicant to enter an appropriate response
  - Tools at the top give quick access to
    - Return to control panel
    - Download as a Word document
    - Save
    - See attachments
Save, Save, Save!

Saving your information is vital. That is why the CPT Smart App saves in a variety of ways, to ensure that your data is safe.

- Every time you select a Nav link
- Going to the previous question via the “Previous” button
- Going to the next question via the “Next” button
- Choosing “Save for Later” and exiting the application
- Selecting “Save” Nav option
- Selecting “Control Panel” Nav option
- Clicking the “breadcrumbs” on the top-left of the page
- Every 2 minutes!

![Current Code Justification](image)
Proposed Code Changes – Searching for Content

• The entire 2020 Code Set at your fingertips!

• Search for content by:
  • Content “drill down”
  • Searching for a guideline, code, child code, or modifier via entering a keyword
  • Searching for a code, child code, or modifier by its number
  • Searching for sections and subsection titles
Proposed Code Changes – Editing Content

Sections and Sub-sections
- Add entire new sections or subsections
- Edit existing names

Guidelines
- Add new guidelines, as well as edit or remove existing guidelines

Codes
- Add new codes or child codes, as well as edit or remove existing codes or child codes
- Indent codes to make new families, outdent to create standalone records

Parentheticals
- Add new parentheticals, as well as edit or remove existing parentheticals

Modifiers
- Add new modifiers, as well as edit or remove existing modifiers

And More!!!!
Proposed Code Changes – Viewing your Proposed Code Changes

• See what your ballot looks like prior to submission

• Continue to make additions, edits, or removals directly

• Come back at any time after making additional changes to see the new ballot
Reference Citations

- Conditional requirements matrix so you know what exactly you need to add
- Ability to add reference and citation materials for each code change that you’re applying for
- Upload PDFs and Word Doc reference files directly
- Edit your references at any time. Find other materials? Come back and add them later
- Ability to remove citations at any time
- Tips and hints for Level of Evidence, Impact Factor, and Overlapping authors for first-time submitters
Control Panel

- Add (or remove) additional applicants and/or Preparers
  - Ability to see if they have completed require attestations
- Ability to rename your application
- Delete your draft application
- Download your application, even after submission
- Submit or Withdraw your application
- View Staff Comments and Agenda Items
- Add and download attachments
## Recent Smart App FAQs

<table>
<thead>
<tr>
<th>Area</th>
<th>Question</th>
<th>Response</th>
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<tbody>
<tr>
<td>Profile</td>
<td>How do I add my organization to my application?</td>
<td>The organization that is currently entered will be tied to any new applications that you create or that you are invited to. If you change your organization after creating an application, you need to either remove and re-add yourself or clone the application.</td>
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<td>Dashboard</td>
<td>Who can see my applications?</td>
<td>Only you can see your “draft” applications. Your list is specific to your applications or any applications you’ve been invited to. Only once you submit your application will AMA Staff be able to view it.</td>
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<td>Dashboard</td>
<td>Do I have to present at the meeting?</td>
<td>Applicants and Preparers do not necessarily need to present at the Panel Meeting</td>
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<td>Code Changes</td>
<td>How do I find and edit a code?</td>
<td>Search for content in the “Proposed Code Changes” page by:</td>
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<td>Once you’ve found the content you’re looking for, you can create your “ballot” using the editor to add new content or edit and remove existing content</td>
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<td>Control Panel</td>
<td>I can’t submit my application, what did I miss?</td>
<td>Double check the following:</td>
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<td>1. That you have at least 1 applicant associated to the application</td>
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<td>2. That all Applicants and Preparers have signed off on all Legal/COI attestations</td>
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CPT Smart App Support
Help! I don’t know what to do

• “Help” videos for specific pages can be found throughout the CPT Smart App

• Each video focuses on that specific page’s functionalities and goals

• Look for the (?) icons in the top-right corner of the page

• Still need more help?
  • Check the FAQs and “training materials” found on the Dashboard
Courses and videos to guide you through CPT Smart App
CPT Smart App’s Three Avenues of Support

• Dedicated email box for questions: ccappsubmit@ama-assn.org
  • Responses within 24 hours

• Toll-free phone number: 888-291-6460
  • Extra support hours from 9/30 – 11/15; 8-6pm & Saturdays 8 – noon CDT

• 24-hour access to training videos on ama-assn.org
  • https://www.ama-assn.org/practice-management/cpt/cpt-code-applications

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<td>Supporting Information/Literature</td>
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<td>Submit/Update-Download</td>
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Key Information

• URL to access the CPT Smart App
  • cptsmartapp.ama-assn.org

• For feedback or questions regarding your CPT Smart App submission email us at:
  • ccappsubmit@ama-assn.org

• Staff Resources:
  • Barbara Benstead: barbara.benstead@ama-assn.org
  • Kyle Dahl: kyle.dahl@ama-assn.org
  • Shawn Agyeman: shawn.agyeman@ama-assn.org
  • Okwara Uzoh: okwara.uzoh@ama-assn.org
  • Ada Walker: ada.walker@ama-assn.org
Questions