



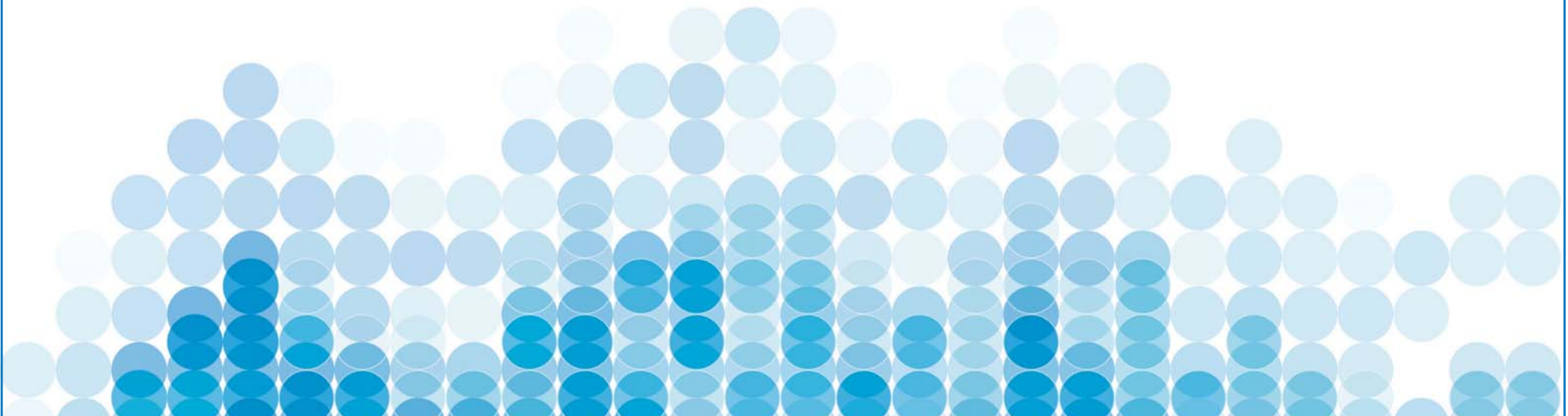
# 2018 User Proxy Model Toolkit

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Resources for Data File CPT® Licensees

— June 2017 —

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## User Proxy Model Calculator for data file licensing (CPT®, ICD-10 and HCPCS)

### Hospital Setting: Use this page, if your setting is Hospital(s) only or a mix of Hospital(s) and Ambulatory Facilities.

(Method for calculating Users of Clinical EMR, Integrated Ambulatory EMR and Patient Billing System as required by CPT Distribution License.)

VENDOR NAME

PRODUCT NAME(S)

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#### PRODUCT CATEGORIES

#### STEP 1: Identify products

For the three product categories, check all which pertain to the product(s) you are licensing. If the product(s) you are licensing is an EMR used exclusively in Ambulatory Facilities, please refer to the next page.

#### Clinical EMR

A product installed in a hospital that includes functions for clinical documentation, order entry, clinical data repository, provider order entry, physician clinical documentation, etc.

#### Integrated Ambulatory EMR

A product installed in an ambulatory setting that includes functions for clinical documentation, order entry, clinical data repository, provider order entry, physician clinical documentation, etc., **where the product is integrated with a Clinical EMR.**

#### Patient Billing System

A product installed in a hospital that automates institutional and professional billing for inpatient and outpatient services and discharged accounts receivable. It may stand alone or integrate with an EMR.

#### STEP 2: Calculate your User subtotal

For each of the product categories you selected in Step 1, multiply your organization's number of Staffed Beds by the factor provided. For those product categories you did not select, enter zero.

$$\frac{\text{Staffed Beds}^*}{\text{Subtotal}} \times 2 =$$

$$\frac{\text{Staffed Beds}^*}{\text{Subtotal}} \times 3 =$$

$$\frac{\text{Staffed Beds}^*}{\text{Subtotal}} \times 1 =$$

\*The total facility beds set up and staffed at the end of reporting period

#### STEP 3: Calculate your Total User count

Add all subtotals from Step 2 to arrive at your Total User count and record this as the number of Users for the purpose of your License.

**TOTAL USERS**



**User Proxy Model Calculator for data file licensing (CPT®, ICD-10 and HCPCS)**  
**AMBULATORY SETTING: Use this page, if your setting is exclusively Ambulatory Facilities.**

(Method for calculating Users of Ambulatory EMR and Practice Management as required by CPT Distribution License.)

VENDOR NAME

PRODUCT NAME(S)

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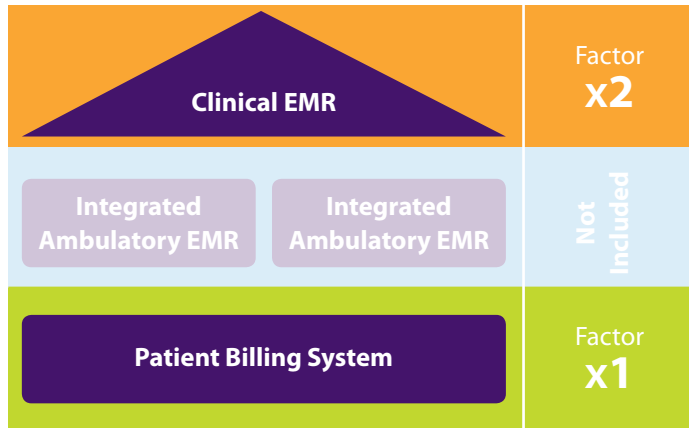
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		<b>PRODUCT CATEGORIES</b>	
<p><b>STEP 1: Identify product</b></p> <p>For the two product categories, check which one pertains to the product you are licensing. If the product you are licensing is an EMR used in a Hospital Setting, please refer to previous page.</p>	<p><input type="checkbox"/> <b>Ambulatory EMR</b></p> <p>A product installed in an ambulatory setting/clinic/physician office environment that includes functions for clinical documentation, order entry, clinical data repository, provider order entry, physician clinical documentation, etc.</p> <p><b>May stand alone or be integrated with a Practice Management product.</b></p>	<b>OR</b>	<p><input type="checkbox"/> <b>Practice Management</b> <i>(stand alone)</i></p> <p>A product installed in an ambulatory setting/clinic/physician office environment that provides the registration, scheduling, and billing functions for a physician office or clinic.</p>
<p><b>STEP 2: Calculate your User Count</b></p> <p>For the product category you selected in Step 1, multiply your organization's number of Billing Providers (FTE) by the factor provided to arrive at your total User count and record this as the number of Users for the purpose of your License. For the product category you did not select, enter zero.</p>	<p align="center"> <math display="block">\frac{\text{Billing Providers}^{\dagger} \text{ (FTE)}}{\quad} \times 4 = \frac{\text{Total}}{\quad}</math> </p> <p><small><sup>†</sup>A health care provider who renders medical services for which a fee is charged</small></p>		<p align="center"> <math display="block">\frac{\text{Billing Providers}^{\dagger} \text{ (FTE)}}{\quad} \times 1 = \frac{\text{Total}}{\quad}</math> </p>



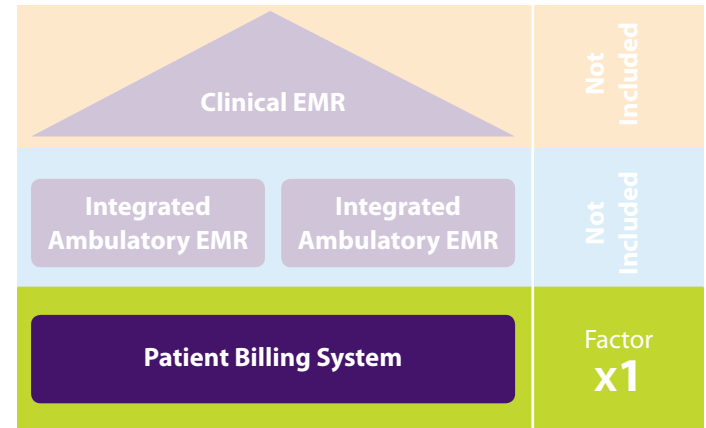
# Hospital Setting: AMA User Proxy Model calculation scenarios for each vendor

**Scenario 1:** Clinical EMR program that is integrated with Patient Billing System in a hospital



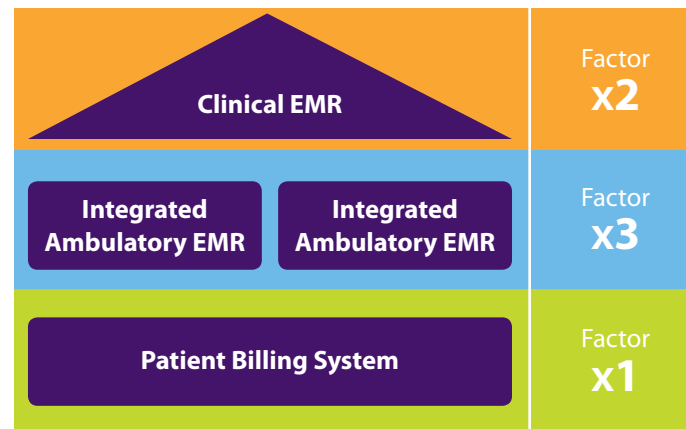
Number of Staffed Beds x (2+1) = Users

**Scenario 2:** Patient Billing System in a hospital not integrated with an EMR



Number of Staffed Beds x 1 = Users

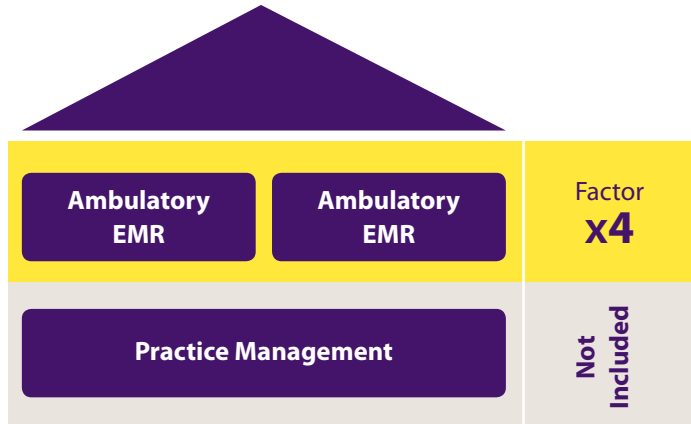
**Scenario 3:** Clinical EMR and Integrated Ambulatory EMR that is integrated with Patient Billing System



Number of Staffed Beds x (2+3+1) = Users

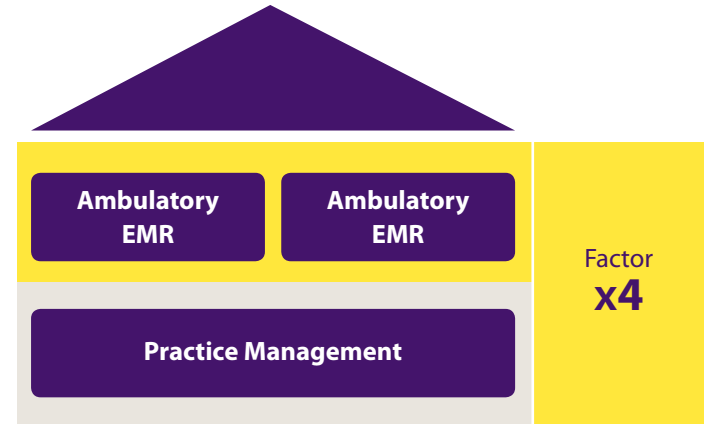
# Ambulatory Setting: AMA User Proxy Model calculation scenarios for each vendor

**Scenario 1: Ambulatory EMR that is not integrated with a Clinical EMR or Practice Management**



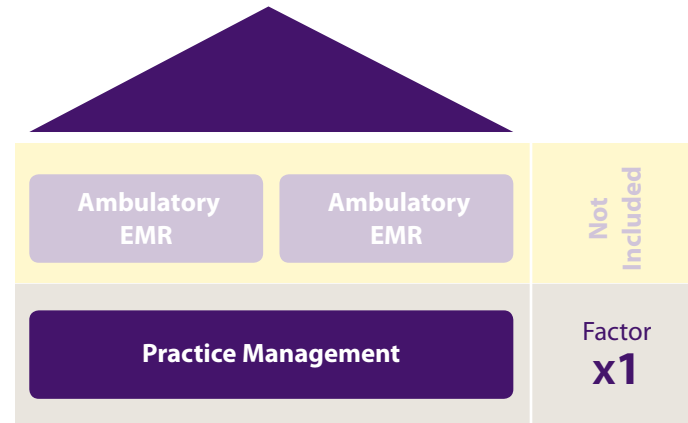
Number of Billing Providers x 4 = Users

**Scenario 2: Ambulatory EMR integrated with Practice Management**



Number of Billing Providers x 4 = Users

**Scenario 3: Practice Management (stand alone)**



Number of Billing Providers x 1 = Users

## What are the definitions of the terms in the User Proxy Model?

**Ambulatory EMR:** A product installed in an ambulatory setting/clinic/physician office environment that includes functions for clinical documentation, order entry, clinical data repository, provider order entry, physician clinical documentation, etc. May stand alone or may be integrated with a Practice Management product.

**Ambulatory Facility:** A facility that provides health services that do not require an overnight stay.

**Billing Provider:** A health care provider who renders medical services for which a fee is charged.

**Clinical EMR:** A product installed in a hospital that includes functions for clinical documentation, order entry, clinical data repository, provider order entry, physician clinical documentation, etc.<sup>1</sup>

**Hospital:** A facility that provides health services often requiring an overnight stay.

**Integrated Ambulatory EMR:** A product installed in an ambulatory setting that includes functions for clinical documentation, order entry, clinical data repository, provider order entry, physician clinical documentation, etc., where the product is integrated with a Clinical EMR.<sup>1</sup>

**Patient Billing System:** A product that automates institutional and professional billing for inpatient and outpatient services and discharged accounts receivable. It may stand alone or integrate with an EMR.<sup>1</sup>

**Practice Management:** A product installed in an ambulatory setting/clinic/physician office environment that provides the registration, scheduling, and billing functions for a physician office or clinic.

**Staffed Beds:** The total facility beds set up and staffed at the end of reporting period.

## Will the 2018 User Proxy Model apply to all products?

The 2018 User Proxy Model applies to: Clinical EMRs, Integrated Ambulatory EMRs, Patient Billing Systems, Ambulatory EMRs and Practice Management products as defined in the User Proxy Model.

## How will Users be determined for programs not covered under the User Proxy Model?

For Licensed Products that are not one of the five product categories defined in the User Proxy Model, User counts will be determined by counting actual Users.

## How was the User Proxy Model determined?

To calculate Users of EMRs and Patient Billing Systems within clinical settings, the AMA reviewed and researched the number of full time employees/equivalents (FTEs) needed to administer those systems for each Staffed Bed. Based on health industry data and customer feedback, the AMA conservatively estimated the number of Users per Staffed Bed for Clinical EMRs, Integrated Ambulatory EMRs, and Patient Billing Systems. In Ambulatory Settings, nearly all employees use EMR programs containing CPT® data files. The Ambulatory EMR User proxy of 4 Users per Billing Provider and Practice Management (stand alone) User proxy of 1 User per Billing Provider was based on research of health industry data pertaining to the ratio of Billing Providers to support staff, which ranges significantly across practices (from as low as over 3 full time supporting staff members to over 7 supporting staff per full time equivalent Billing Provider). When Practice Management Systems are not integrated with an Ambulatory EMR, our research indicates staff equivalent to one FTE are required to support the system.

<sup>1</sup>Source – HIMSS Category Definitions

## Frequently asked questions

### **When is a license agreement required for use of AMA data files?**

Current Procedural Terminology (CPT®) and other coding files are the copyrighted intellectual property of the American Medical Association (AMA). As such, any use of the content from a data file, including uploading data files into a program or making use of a program containing the data files, requires a valid license.

### **Who is considered a User of the data files beyond my coders and billers?**

The AMA defines User in the CPT license agreement, as follows:

A User of a File is defined as an individual who: (a) accesses, uses, or manipulates CPT Editorial Content contained in the Electronic Licensed Product; or (b) accesses, uses, or manipulates the Electronic Licensed Product to produce or enable an output (data, reports, or the like) that could not have been created without the CPT Editorial Content embedded in the Electronic Licensed Product even though CPT Editorial Content may not be visible or directly accessible; or (c) makes use of an output of the Electronic Licensed Product that relies on or could not have been created without the CPT Editorial Content embedded in the Electronic Licensed Product even though CPT Editorial Content may not be visible or directly accessible.

### **What if the User Proxy Model calculates more CPT® Users than there are full time employees in my organization?**

In rare instances, an alternative methodology will be considered in these cases. Please contact your AMA Representative.

### **How should part-time Billing Providers such as visiting physicians be calculated?**

If the appropriate licensing model for your Licensed Product is an Ambulatory EMR, the number of Billing Providers that should be input into the User Proxy Model calculation will be the number of full-time equivalent (FTE) Billing Providers. If the vendor has a current method of determining FTE Billing Providers AMA will accept that count. Otherwise, the number of Billing Providers should be calculated by adding the total number of hours worked by all Billing Providers in an average week and divide the total by 40. This would mean a physician working only 1 day per week would be 1/5 of an FTE.

### **What is the difference between “Integrated Ambulatory EMR” and “Ambulatory EMR”?**

The product category “Integrated Ambulatory EMR” refers to scenarios where the product is integrated with a Clinical EMR within a hospital system. In contrast, the product category “Ambulatory EMR” refers to scenarios where the product may stand alone or may be integrated with Practice Management products.