

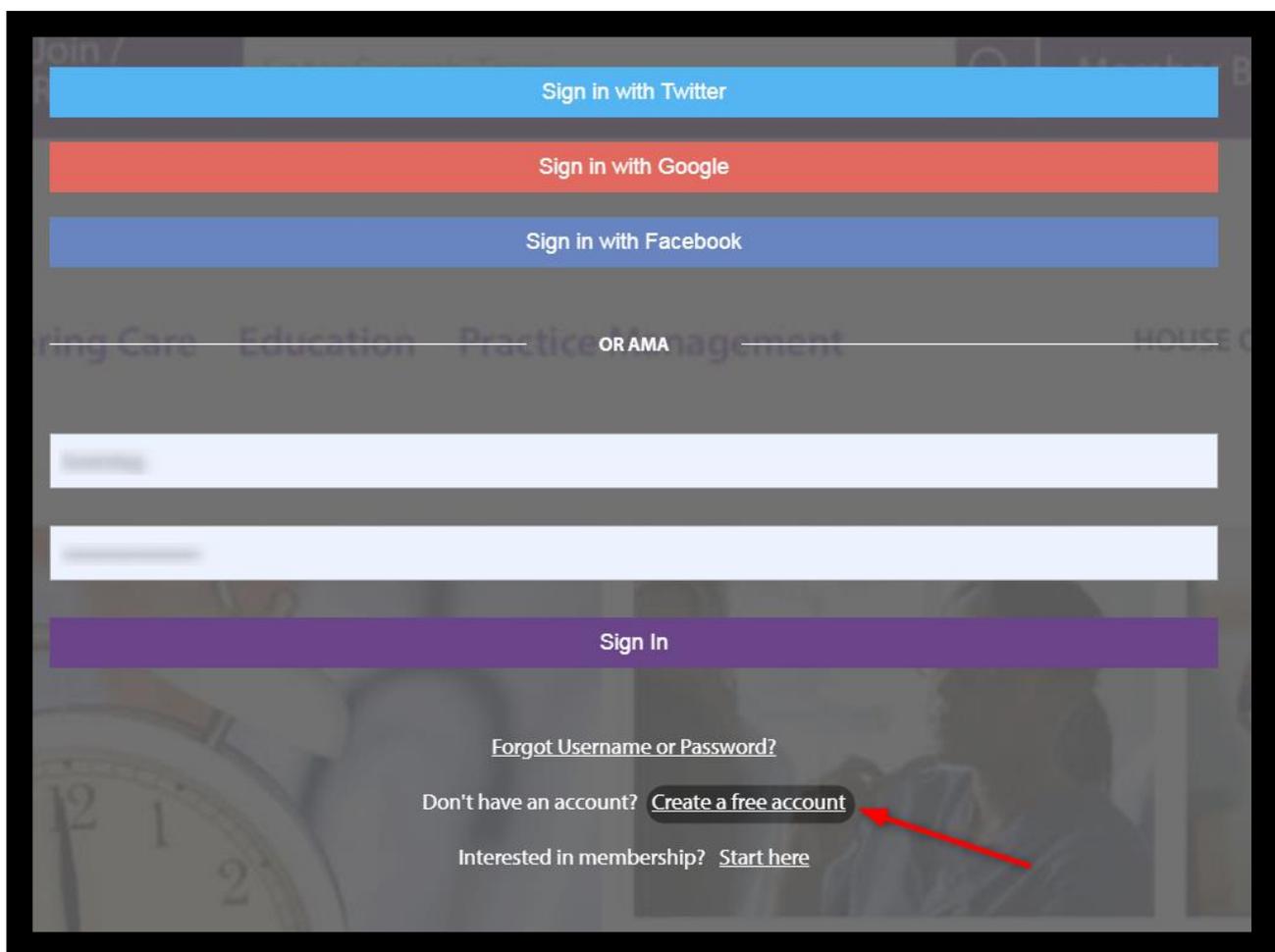
# AMA Royalties Portal User Manual

This document describes the process of using the new AMA Royalties portal, found at <https://royaltiesportal.ama-assn.org>. Find detailed explanations of each step by clicking the triangle to the left of each heading to expand the section. You may also view a video complement to this document [here](#).

## 1. Register for an account.

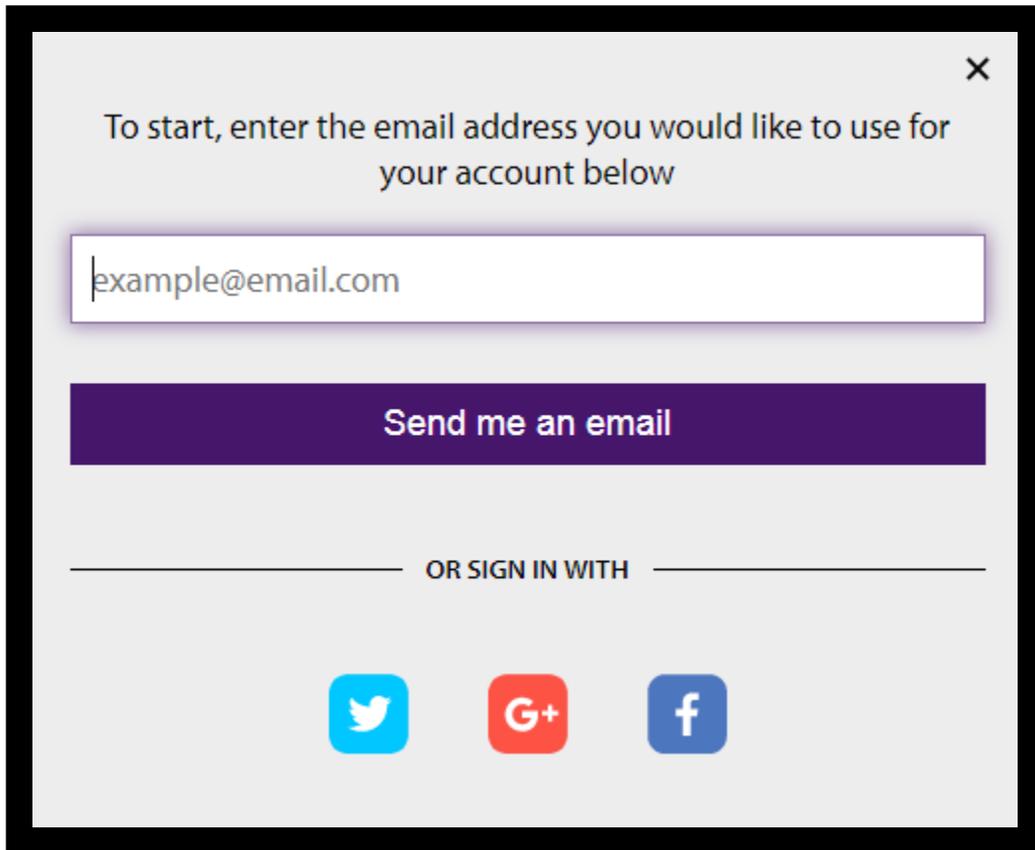
To get started on the new royalties portal, you will need to have an account on AMA Sign-In. If you already have one, you can simply sign in. If not, you will need to create one: simply visit <https://royaltiesportal.ama-assn.org> scroll down near the bottom of the screen, and click *Create a free account*.

Figure 1



Upon clicking *Create a free account*, a window will appear. Use it to enter your email address.

Figure 2



✕

To start, enter the email address you would like to use for your account below

Send me an email

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OR SIGN IN WITH

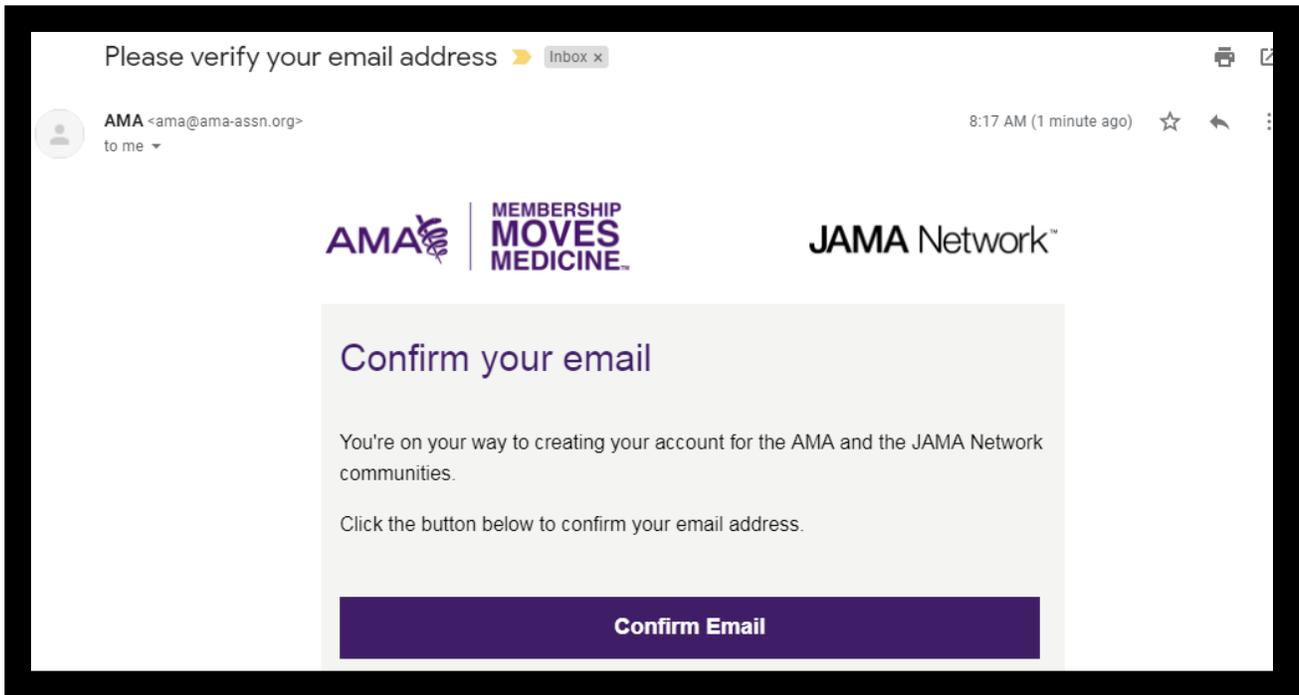


Click *Send me an email*, then check your email to view a message from [ama@ama-assn.org](mailto:ama@ama-assn.org)<sup>1</sup>. Follow the prompt in this message to verify your email address.

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<sup>1</sup> If you do not see the message in your inbox, be sure to check junk and spam folders.

Figure 3



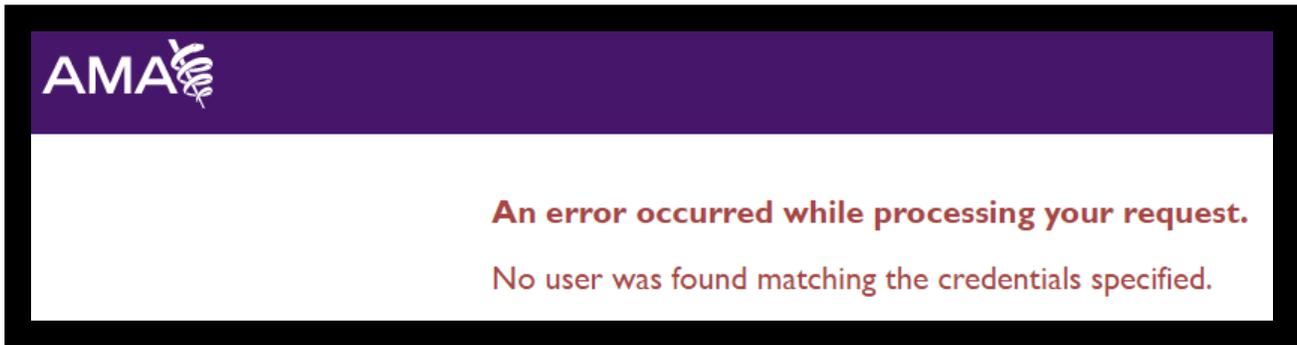
Upon clicking "Confirm Email", you will be led to an account creation menu. Use it to create your username and password.

Figure 4

This is a screenshot of a "Complete your profile" form. The header includes "Renew", "Enter Search", "Complete your profile", and "Member B". The form consists of several input fields: a text field containing "Bryan", a blurred text field, a dropdown menu set to "USA", another dropdown menu set to "Administrative", a link for "Why do we ask for this information?", a blurred text field, a password field with "\*\*\*\*\*", a link for "Password Requirements", another password field with "\*\*\*\*\*", and a large purple button labeled "Continue" at the bottom.

Upon clicking *Continue*, your account is created; however, if your email address<sup>2</sup> is not connected to a contract, you will see an error message like the one in Figure 5, below:

Figure 5



There are two parties who can solve this problem for you – your company’s *Contract Administrator* and the AMA portal administrators. One of these parties will need to assign your email address to the contract you are seeking to access. Contact either your *Contract Administrator* or [ama.royaltyreports@ama-assn.org](mailto:ama.royaltyreports@ama-assn.org) – be sure to mention the contract you need to access, and the role you need to fulfill (i.e., reports, payments, or both).

Once your account is created and tied to the correct contract(s), successful login will lead you to the portal. The main pages and sub-pages of the portal, as well as which main page serves as your landing page, are all determined by your user permissions, which are discussed in Section 2.

## 2. Navigate the main pages of the portal.

Each user’s permissions are set by the *Contract Administrator* assigned to the user’s contract(s). Your user permissions will determine which facets of the portal you are able to see, and which functions of the portal will be operational for you.

### a. If you have a reporting role, you will first see the “Reports” page.

Upon login, any user with a reporting role will be led directly to *Reports*; specifically, the user will be led to *Reports-Open* (discussed in section 3.a, below). If the user has permissions to submit both reports and payments, the user will be led to the *Reports-Open* page.

### b. If you have only a paying role, you will first see the “Payments” page.

Users whose permissions are specific to submitting payments will be led upon login to the *Payments* page; specifically, they will be led to the *Payments-Due* page (discussed in section 3.b, below). Though users with payment permissions will also see the *Reports* page, their *Reporting* permission is view-only – they will not be able to submit reports.

### c. If you are a contract administrator, you will also see “Administration”.

*Contract Administrators* are the *super-users* for their contracts. CAs can view and submit reports, view and submit payments, and add/edit users and user permissions for their contracts. To enable this functionality, Contract Administrators are shown a third tab in the top ribbon called *Administration*.

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<sup>2</sup> The email address you entered on the screen in exhibit 2, above

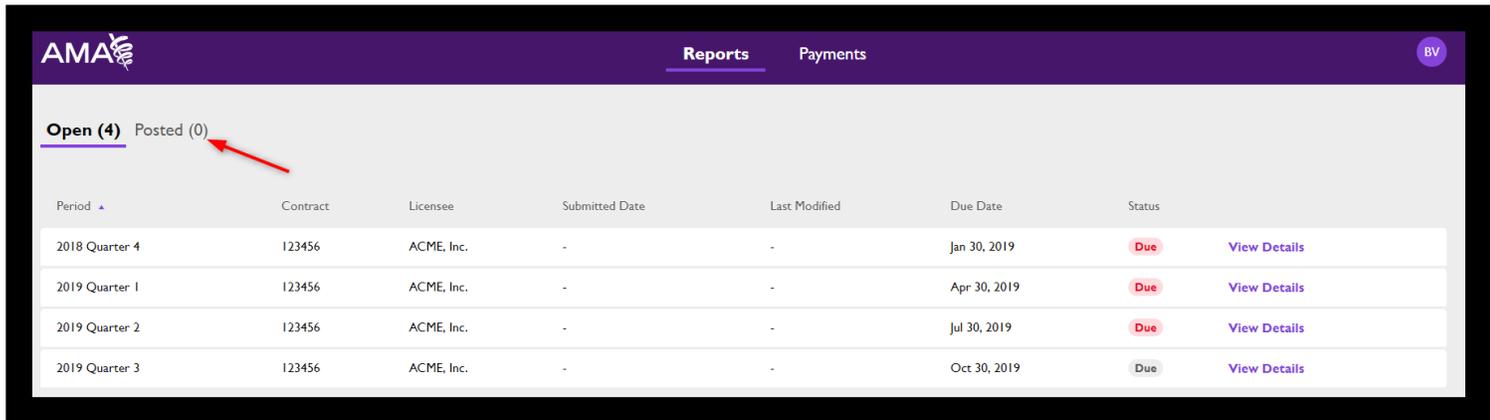
### 3. Navigate the sub-pages of the portal.

The main pages (*Reports*, *Payments*) of the portal are each split between current and historic items. This allows users broad visibility into the activity of their contract, regardless of who completed each activity.

#### a. Within “reports”, notice the split between “open” and “posted”.

For all users, the *Reporting* page defaults to *Open* reporting periods. The active tab is indicated by a purple underline. Notice you can also click on *Posted* to view all previously posted reporting periods for your contract.

Figure 6

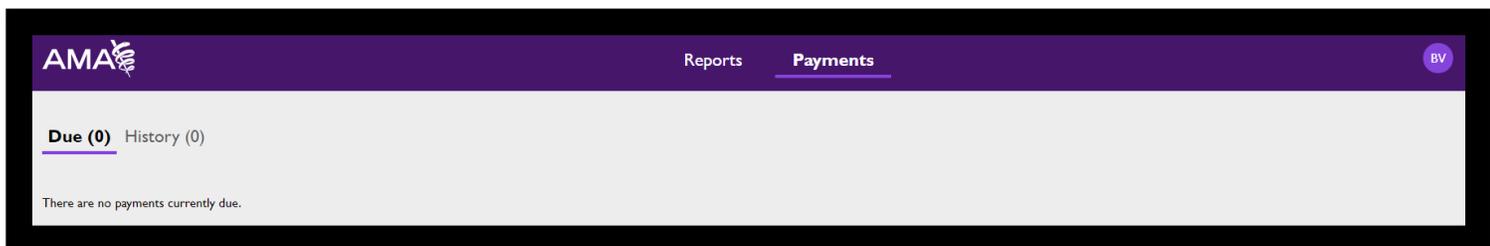


Period	Contract	Licensee	Submitted Date	Last Modified	Due Date	Status	
2018 Quarter 4	123456	ACME, Inc.	-	-	Jan 30, 2019	Due	<a href="#">View Details</a>
2019 Quarter 1	123456	ACME, Inc.	-	-	Apr 30, 2019	Due	<a href="#">View Details</a>
2019 Quarter 2	123456	ACME, Inc.	-	-	Jul 30, 2019	Due	<a href="#">View Details</a>
2019 Quarter 3	123456	ACME, Inc.	-	-	Oct 30, 2019	Due	<a href="#">View Details</a>

#### b. Within “payments”, notice the split between “due” and “history”.

For all users with payment permissions, the *Payments* page defaults to *Due* payments. The active tab is indicated by a purple underline. Notice you can also click on *History* to view all previously posted payments for your contract. If you have no payments due, the *Payments-Due* page will so state, as in the image below.

Figure 7



Due (0) History (0)

There are no payments currently due.

### 4. Before you report, consider your license agreement

The behavior of your reporting template in the royalties portal is prescribed by the terms of your license agreement. Start by considering what the *unit of licensure* is for each of your products. If your product is an EHR, the unit of licensure is likely a *user*; if your product is sold to health plans, the unit of licensure is likely a *member*; if yours is a Provider Health Analytics product, the unit of licensure is likely a *weighted patient interaction*.

#### a. User Proxy Model

The user proxy model is a method of using a base metric like staffed beds or billing providers to approximate the user count for your product. The portal’s reporting template is built around the assumption that you have applied the user proxy model to derive a User count. The unit of licensure for this model is a *user*, so the user count (not the base metric) belongs in the ‘usage’ column.

## b. Health Plan Licensing Model

If your products are licensed on the Health Plan Licensing Model, your unit of licensure is likely *not* users, but is instead members. In this case, it is *member* count that belongs in the *usage* column. This usage will be multiplied by the agreed-upon royalty rate. Bear in mind that, though the royalty rate may have been described in terms of per-thousand-members, the royalty rate against which your reported usage will be calculated is established on a per-unit basis. (For example, if your rate is described as \$5.00 per thousand members, understand that your reports will be calculated at \$0.005 per member.)

## c. Provider Health Analytics Licensing Model

If your products are licensed on the Provider Health Analytics Licensing Model, your unit of licensure is likely *not* users, but is instead *Weighted Patient Interactions* (WPIs). In this case, it is *WPI* count that belongs in the *usage* column. The template assumes that the calculation from which WPIs is derived has already been completed. Bear in mind that, though the royalty rate may have been described in terms of per-thousand-WPIs, the royalty rate against which your reported usage will be calculated is established on a per-unit basis. (For example, if your rate is described as \$5.00 per thousand WPIs, understand that your reports will be calculated at \$0.005 per WPI.)

## d. Reporting across Models

Some licensees may sell one product across two (or more) licensing models. In cases like this, your reporting template will list the product twice – once for each model. Take note of the value in the ‘Channel’ field within the ‘Rights’ section of your reporting template. This will be the key differentiator. The row whose channel bears the name of a Health Plan or PHA system array (e.g., “Claims Management”, or “Medical Management”) represents the right that will be calculated at the Health Plan or PHA royalty rate.

## e. Bottom Line

It is important to understand your licensing model(s) before reporting.

The *unit of licensure* for your product may be a derived value (For example, Users = Staffed Beds x 3, and WPIs = 44 x total inpatient discharges + total outpatient visits). In these cases, report the derived value (not the underlying calculations) in the usage column.

Always report your products’ usage on a per-unit basis, even if you have seen or heard the royalty rate described on a per-thousand-unit basis.

# 5. Complete and submit a report.

For many users, the key functionality of the portal is the submission of royalty reports. This portal and its report template combine the customer-level report (historically referred to as “Part II”) with the product-level summary (“Part I”) to allow you to submit a single report for each period.

## a. Identify the period you want to report on

A user with reporting permissions will see all outstanding periods in the *Reports-Due* menu<sup>3</sup>. Click *View Details* on the row corresponding to the period you wish to report on.

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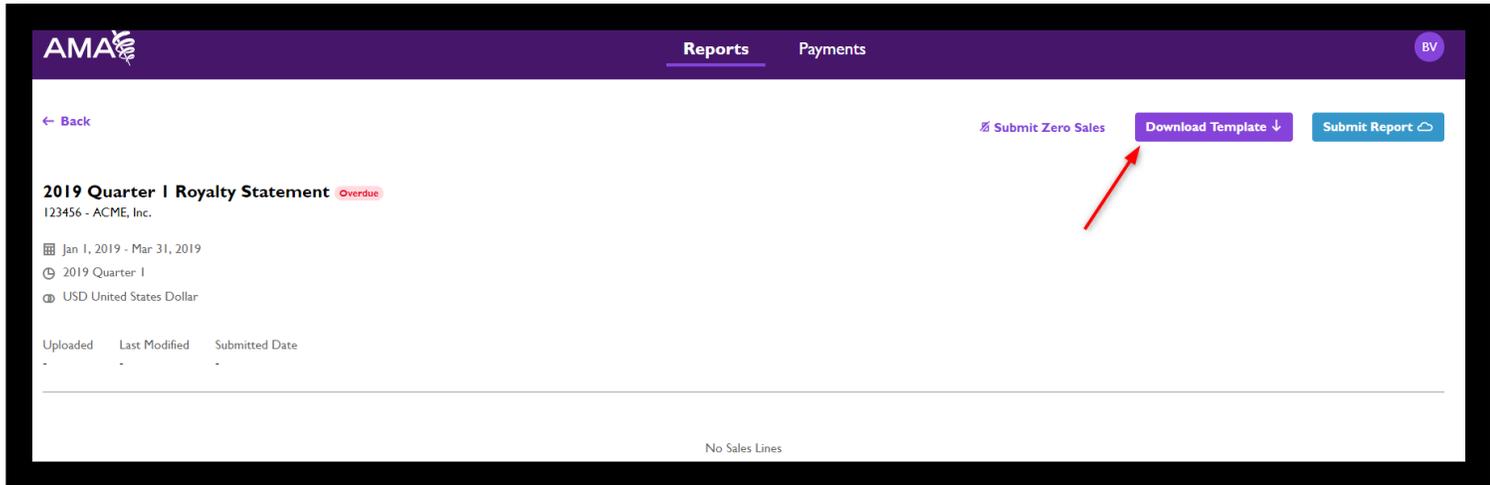
<sup>3</sup> A reporting period is displayed in this menu if its due date is less than 3 years prior, or less than 90 days after, the date of the user’s login.

Note: Some users may occasionally need to submit a *Zero-Users* report. See instructions for *Zero-Users* reports in [Appendix A](#).

### b. Download a template.

To submit a report, start in the *Reports-Due* page. After clicking *View Details* on the row corresponding to the period you wish to report on, click *Download Template* at the top of the details page.

Figure 8



### c. Fill in the template with your usage data.

This template is intended to include each of your end-user customer sites, their geography, the products they use, and the number of users of each product at each site.

You will see one of two versions of the template – if your contract includes *User Proxy Model* details, then your template will include fields for those details. If your contract does not include *User Proxy Model* details, then your template will omit fields for those details.

Upon downloading a template from the portal, you will see that the top-left corner includes indicators of the contract and company you're reporting for, the period you're reporting for, and the date you downloaded the template. You will also see that each of your rights is listed individually across the five columns of the *Rights* section.

Figure 9

<b>Licensee Name</b>	ACME, Inc.	Unique identifiers for your company, your contract, the period you're reporting for, and the date you downloaded the template.
<b>Contract</b>	123456	
<b>Party (Customer ID)</b>	TEST	
<b>Period End Date</b>	3/31/2019	
<b>Date Reported</b>	8/14/2019	

Rights					Organization's Unique ID*	Organiza
SKU	Name of Your Licensed Product	AMA Licensed Editorial Content	Channel	Number of Annual Releases of CPT*		
123456-1_CPTA	Product A	CPT Assistant	Standard	1		
123456-1_CPTCS	Product A	CPT CodeSet	Standard	1		
123456-2_CPTA	Product B	CPT Assistant	Standard	1		
123456-2_CPTCS	Product B	CPT CodeSet	Standard	1		
Unique identifiers for the Rights associated with your contract. Notice that your product may have more than one right (in this case, Product A and Product B each have 2 rights - one for each of the Editorial Content each product carries).						

i. List each of your customer sites in column G.

It is generally good practice to start in Column G, listing each of your customer sites one by one. If a customer site uses more than one of the *Rights* listed, the site will need to be listed more than once. In the example below, 3 customer sites access both CPT CodeSet and CPT Assistant through Product A, and 3 customer sites access both CPT CodeSet and CPT Assistant through Product B.

ii. Note geographic identifiers for each customer site.

To ensure that all users of AMA Licensed Editorial Content through our distributors' products remain compliant, we depend on your royalty reports to list each of them in a way that definitively identifies them – for this, we need a meaningful Organization Name, City, State/Territory, and Country. Use 2-character abbreviations for Country (a link for those abbreviations is included in the *Instructions* tab of your template).

iii. Note User Proxy Model details where applicable.

If your contract obligates you to include *User Proxy Model* details, be sure to include them in your reports. Every field whose name begins with the word *Total* must be populated with a positive integer or left blank. Use the *Instructions* tab of the template workbook to fully understand the details of the validation of these fields.

iv. List each customer site's usage in the "usage" column.

Most licensees will use this field to note the number of *users* of each Right at each customer site; licensees reporting usage in print products will use this field to note the number of book *copies*; and licensees reporting usage by health plans will use this field to note the number of *members*.

The values in this field will be multiplied by the royalty rate for the corresponding *right*. Consult your royalty agreement if you are unsure as to what kind of base metric should be noted in this field.

v. Copy entire "rights" section to match customer sites using each right

The contents of columns A-E represent the rights associated with a specific combination of 1) AMA Editorial Content, 2) Licensed Product, and 3) Channel. Be sure to identify the right that each customer is to be reported for, and copy the values of those five cells to map onto each customer site using that right. Every row that has content in the *End-User Customers* section (in blue) must also have content in the *Rights* section (in red), as well as the *Usage* section (in aqua).

Figure 10

Rights		End-User Customers						Hospital/Ambulatory					Payers			Usage				
SKU	Name of Your Licensed Product	AMA Licensed Editorial Content	Channel	Number of Annual Releases of CPT*	Organization's Unique ID*	Organization Name	Parent Organization*	City	State/Province	Country	Total Staffed Beds*	Total Billing Providers*	Care Settings*	Total MDs*	Total Residents*	Total Outpatient Visits*	Use Case*	Total Members*	Total FTEs*	Users, Copies, or Members
123456-1_CPTA	Product A	CPT Assistant	Standard	1	Hospital 123	Hospital 123	St. George	UT	US	167	Hospital									501
123456-1_CPTA	Product A	CPT Assistant	Standard	1	Hospital 456	Hospital 456	Nashville	TN	US	63	Hospital									189
123456-1_CPTA	Product A	CPT Assistant	Standard	1	Hospital 789	Hospital 789	Tampa	FL	US	99	Hospital									297
123456-1_CPTCS	Product A	CPT CodeSet	Standard	1	Hospital 123	Hospital 123	St. George	UT	US	77	Hospital									231
123456-1_CPTCS	Product A	CPT CodeSet	Standard	1	Hospital 456	Hospital 456	Nashville	TN	US	47	Hospital									141
123456-1_CPTCS	Product A	CPT CodeSet	Standard	1	Hospital 789	Hospital 789	Tampa	FL	US	63	Hospital									189
123456-2_CPTA	Product B	CPT Assistant	Standard	1	123 Clinic	123 Clinic	Las Vegas	NV	US		13 Ambulatory		13							52
123456-2_CPTA	Product B	CPT Assistant	Standard	1	456 Clinic	456 Clinic	Springfield	OH	US		11 Ambulatory		11							44
123456-2_CPTA	Product B	CPT Assistant	Standard	1	789 Clinic	789 Clinic	Jackson	MS	US		5 Ambulatory		5							20
123456-2_CPTCS	Product B	CPT CodeSet	Standard	1	123 Clinic	123 Clinic	Las Vegas	NV	US		10 Ambulatory		10							40
123456-2_CPTCS	Product B	CPT CodeSet	Standard	1	456 Clinic	456 Clinic	Springfield	OH	US		14 Ambulatory		14							56
123456-2_CPTCS	Product B	CPT CodeSet	Standard	1	789 Clinic	789 Clinic	Jackson	MS	US		14 Ambulatory		14							58

d. Save the completed report and return to the portal.

Back in the details page of the period you wish to report on, click "Submit Report".

Figure 11

The screenshot shows the '2019 Quarter I Royalty Statement' page for contract 123456 - ACME, Inc. The page includes a navigation bar with 'Reports' and 'Payments' tabs, and a user profile 'BV'. A red arrow points to the 'Submit Report' button in the top right corner. Below the header, there are buttons for 'Submit Zero Sales', 'Download Template', and 'Submit Report'. The main content area shows the report details: '2019 Quarter I Royalty Statement Overdue', '123456 - ACME, Inc.', 'Jan 1, 2019 - Mar 31, 2019', '2019 Quarter I', and 'USD United States Dollar'. A table with columns 'Uploaded', 'Last Modified', and 'Submitted Date' is shown, but it is empty. At the bottom, it says 'No Sales Lines'.

e. Click "Submit Report", select your saved file, verify, and submit.

Upon clicking *Submit Report*, a *Submit Report* modal will appear. Use this modal to select the file you saved in step 4.d (item 1, below).

Optionally, you may enter a value in the *Licensee Report Valuation Amount* (item 2, below). This field allows you to memorialize your estimation of the royalties the submitted report will incur; however, the portal will not calculate anything against this number. Instead, royalties will be calculated by the *Usage* column, multiplied by the rates on file for each *right* in your contract.

Finally, click the checkbox to attest that the report you've selected is complete and accurate to the best of your knowledge (item 3, below), and click *Submit* (item 4).

Figure 12

The screenshot shows a 'Submit Report' form with the following fields and elements:

- Contract:** 123456
- Period:** 2019 Quarter I
- Due Date:** Apr 30, 2019
- File Selection:** A 'Choose File' button followed by the filename 'RoyaltiesRe...31 (2).xlsx' with a red circle containing the number 1.
- Valuation Amount:** A text input field containing '\$29,964.00' with a red circle containing the number 2.
- Attestation:** A checked checkbox with a red circle containing the number 3, followed by the text: 'By submitting this Royalty Report to the AMA through this website, I attest that the information contained in this report is complete and accurate to the best of my knowledge. I understand that the Licensee Report Valuation Amount is an optional field that does not necessarily reflect a final balance due to the AMA. I understand that I may contact the AMA at any time to discuss any discrepancies between the Licensee Report Valuation Amount and the Calculated Royalty amount.'
- Buttons:** A 'Cancel' button and a 'Submit' button with a red circle containing the number 4.

## 6. Allow time for reports to be processed.

Each report you submit to the Royalties Portal must be validated and processed by AMA personnel. This process can take up to 2 days on normal business days. If you miss the reporting deadline, however, the turnaround time can be even longer – up to 5 days. It is best to plan to submit reports at least 2 days ahead of each due date, and to plan to return to the portal to submit a payment on the due date to remit payment against the posted report.

## 7. Submit a payment.

Once a report is fully processed, it will appear in the *Payments-Due* tab to all users with payment permissions. If your contract has any open *fees* (separate from royalty balances), the payments page will present those items as well.

Figure 13

The screenshot shows the 'Payments' section of the AMA portal. On the left, a table lists three overdue payments:

Pay	Period	Contract	Licensee	Payment Status	Due Date	Amount	Balance	
<input checked="" type="checkbox"/>	2013 Quarter 4	1118	Medigen Medical Devices	Overdue	Jun 23, 2016	\$21,168.00	\$0.01	<a href="#">View Report</a>
<input checked="" type="checkbox"/>	2019 Quarter 1	1582	Medigen Medical Devices, Inc.	Overdue	May 22, 2019	\$62,106.00	\$62,106.00	<a href="#">View Report</a>
<input checked="" type="checkbox"/>	2019 Quarter 2	1582	Medigen Medical Devices, Inc.	Overdue	Jul 8, 2019	\$3,168.00	\$3,168.00	<a href="#">View Report</a>

On the right, a 'Payment' summary shows:

- 2013 Quarter 4: \$0.01
- 2019 Quarter 1: \$62,106.00
- 2019 Quarter 2: \$3,168.00
- Total: \$65,274.01**

Below the summary, there is a checkbox for terms of use and buttons for 'Pay by ACH Debit', 'Pay by Credit Card', and 'Print Statement'.

## 8. Appendices

### a. Submitting a Zero-Users Report

Because reports are due each period even when there are no sales to report, some users will occasionally need to submit a *zero-users* report. This is a simple process: after clicking *View Details* on the row corresponding to the period you wish to report on, click *Submit Zero Sales* at the top of the details page.

The screenshot shows the '2018 Quarter 4 Royalty Statement' details page. At the top right, there are three buttons: 'Submit Zero Sales' (with a red arrow pointing to it), 'Download Template', and 'Submit Report'. The page content includes:

- ← Back
- 2018 Quarter 4 Royalty Statement Overdue
- 123456 - ACME, Inc.
- Oct 1, 2018 - Dec 31, 2018
- 2018 Quarter 4
- USD United States Dollar
- Table headers: Uploaded, Last Modified, Submitted Date
- No Sales Lines

Upon clicking *Submit Zero Sales*, a modal will appear, requiring you to attest that your zero-users report is complete and accurate to the best of your knowledge. Click the checkbox, then click *Submit Zero Sales*.

### Submit Zero Sales ✕

Contract	Quarter	Due Date
123456	2018 Quarter 4	Jan 30, 2019

You are reporting no new sales for the current period.

By submitting this Zero-Users Royalty Report to the AMA through this website, I attest that the information contained in this report is complete and accurate to the best of my knowledge.

## 9. Troubleshooting