



[Get Help](#)

# CPT Collaboration User Guide

CPT Editorial Panel

CPT Assistant Editorial Board

2/22/22 v2.2

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# QuickStart— Panel; 1/2

1. Upcoming meeting materials
2. Navigate to home page
3. Search for content
4. Access past meeting content
5. Access various resources

The screenshot shows the CPT Collaboration Home website interface. The top navigation bar includes 'CPT Collaboration Home', 'Panel Home', 'Workgroups', 'Caucus Sites', 'Resources', and 'Advanced Search'. The main header features the 'cpt' logo and 'CPT Collaboration Home' with sub-navigation for 'Rosters', 'Calendars', and 'Archived Panel Meetings'. The main content area is divided into three sections: 'Active Editorial Panel Meetings' (highlighted with callout 1), 'Events' (with a calendar view showing meetings for Jan 31, Mar 13, Apr 12, and May 14-16), and 'Resources' (highlighted with callout 5, containing links for '2022 CPT Professional', 'Category I-III Criteria', 'Code Change Information...', 'Encoder Pro 360', '2020 RUC Database', 'CPT Smart App', 'CPT Assistant Online', 'PLA Portal', and 'Panel Handbook'). An 'Announcements' section at the bottom features a post by Michael Pellegrino titled 'Go Live Target February 28', created on January 14. A red starburst 'Get Help' button is located in the bottom right corner.

# QuickStart— Panel; 2/2

1. Access Surveys
2. Navigate to home page
3. Select files for download
4. Download button

CPT Collaboration Home > 2022, February CPT Editorial Panel Meeting > Code Changes Documentation Library

Resources ▾

**cpt** 2022, February CPT Editorial Panel Meeting

Panel Documents

Meeting Documents

Wrap-Up Report

Executive Committee Age...

Executive Committee Rep...

Panel Agenda [Panel + St...

Advisor Survey Responses

Discussion Board

Surveys

Recycle bin

Edit

Download Copy to

Code Changes Documentation Library > Tab 12- Intraoperative Cardiac Ultrasound

	Name ▾	Modified ▾
Document Type : 1 - Panel Agenda Item (2)		
<input checked="" type="checkbox"/>	0-CCA-Intraoperative Cardiac Ultrasound.docx	December 2, 2021
<input checked="" type="checkbox"/>	PAV2-Intraoperative Cardiac Ultrasound.docx	January 7
Document Type : 2 - Supporting Documentation (17)		
<input checked="" type="checkbox"/>	AI1-Glas-2007-Question from CCA-IV.3-Diagnostic Test....	December 2, 2021
<input checked="" type="checkbox"/>	AI2-Reeves-2007-Question from CCA-IV.3-Diagnostic T...	December 2, 2021
<input type="checkbox"/>	FDA Approval Letter-2017-d-53720007.pdf	December 2, 2021



# QuickStart Advisors

CPT Collaboration Home > 2022, May - CPT Editorial Panel Meeting

2022, May - CPT Editorial Panel Meeting

Panel Documents

- 1 Meeting Documents
- Panel Agenda [Advisors]
- Advisor Survey Responses
- Recycle bin

Panel Agenda

Share Copy link Download

1 selected Advisor View

Tab	Title	Date	Advisor	Action
11	Tab 11- Transluminal ...	4 days ago	Heart Rhythm Society Lawrence Epstein American Academy of Sleep Medicine Michael Repka American Academy of Ophthalmology	Advisor Response Form <a href="#">View Discussion</a>
12	Tab 12-Cat III- Arteriovenous Ana...	4 days ago	Lynn Saccoliti Emerson Consultants, Inc.	Advisor Response Form <a href="#">View Discussion</a>
13	Tab 13-WITHDRAWN 3-8-22 Extra...	4 days ago	Barb Peterson Emerson Consultants, Inc.	Advisor Response Form <a href="#">View Discussion</a>
14	Tab 14- Fluorescent-guided Crani...	4 days ago	Gail Osborn Modernizing Medicine	Advisor Response Form <a href="#">View Discussion</a>
15	Tab 15- Open Subtotal Cholecyste...	4 days ago	Karen Warner Nx Development Corp Patricia Christianson Passel Ambit Consulting LLC Sharmila Dissanaik Texas Tech University Health Sciences Center	Advisor Response Form <a href="#">View Discussion</a>

1. Access Survey links
2. Navigate to home page
3. Select files for download
4. Download button



# QuickStart—CPTA

3 AMAtoday Search this site

CPT Assistant Home Resources

CPT Assistant Home Rosters Archived Meeting Materials 4

+ New Page details Analytics

1 Newsletters for Review

- NS 2022, march - Newsletter Sec... MN 2022, March - Newsletter Firs...
- FC 2022, February CPT Assistant ... FC 2022, February CPT Assistant ...

2 February 2022 CPT Assistant Editorial Board Meeting

Name	Modified	Modified By
Agenda	January 26	Ted Nubel
Agenda Items	December 15, 2021	Ted Nubel
New Business	January 27	Ted Nubel
Old Business	January 27	Ted Nubel

Events

+ Add event

Create an event

When you add an event, it will show here where your readers can see it.

Month 01 Title of event Tuesday 12:00 AM - 1:00 PM

Month 01 Title of event Tuesday 12:00 AM - 1:00 PM

Month 01 Title of event Tuesday 12:00 AM - 1:00 PM

Announcements

See all

Created By

Rejina Young

Title

March 2nd Pass Articles due February 8th

Created

January 26

Get Help

1. Newsletter Issues Folders
2. Upcoming Board Meeting folders
3. Navigate to home page
4. Access prior Board Meeting materials

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## Targeted Navigation

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[CPT PANEL MEETING—  
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[ARCHIVED- PANEL MEETINGS](#)

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# NAVIGATION

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• NAVIGATION

# General Navigation

Clicking on the link titled CPT Collaboration Home takes you to the homepage

Clicking on the CPT logo posted in the upper left corner will take you back to the homepage of the current site you are on. Within a meeting site, assistant newsletter site, workgroup, or caucus, this will take you to the root of that site

The screenshot shows the CPT Collaboration Home website. At the top, there is a purple navigation bar with the text "CPT Collaboration Home" highlighted by an orange box. Below this bar are several menu items: "Panel Home", "Workgroups", "Caucus Sites", "Resources", and "Advanced Search". The main header area features the "cpt" logo in a purple square, also highlighted by an orange box, followed by the text "CPT Collaboration Home" and sub-menu items "Rosters", "Calendars", and "Archived Panel Meetings".

The main content area is divided into three columns:

- Active Editorial Panel Meetings:** Shows a meeting titled "2022, February CPT Editorial Panel Meeting" with a "FC" icon.
- Events:** Displays a calendar view with events for January 31, March 13, April 12, and May 14-16. The January 31 event is titled "February CPT Assistant Meeting".
- Resources:** A grid of nine resource cards, including "2022 CPT Professional", "Category I-III Criteria", "Code Change Information...", "Encoder Pro 360", "2020 RUC Database", "CPT Smart App", "CPT Assistant Online", "PLA Portal", and "Panel Handbook".

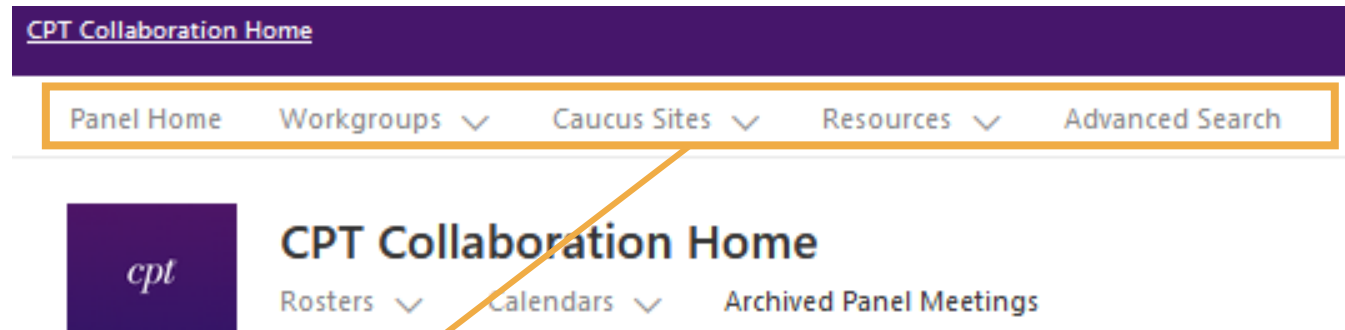
At the bottom, there is an "Announcements" section with a "See all" link. The announcement is titled "Go Live Target February 28" and was created on January 14 by Michael Pellegrino.





NAVIGATION

# Hub Navigation



The Hub Navigation links are posted along the top of every page.

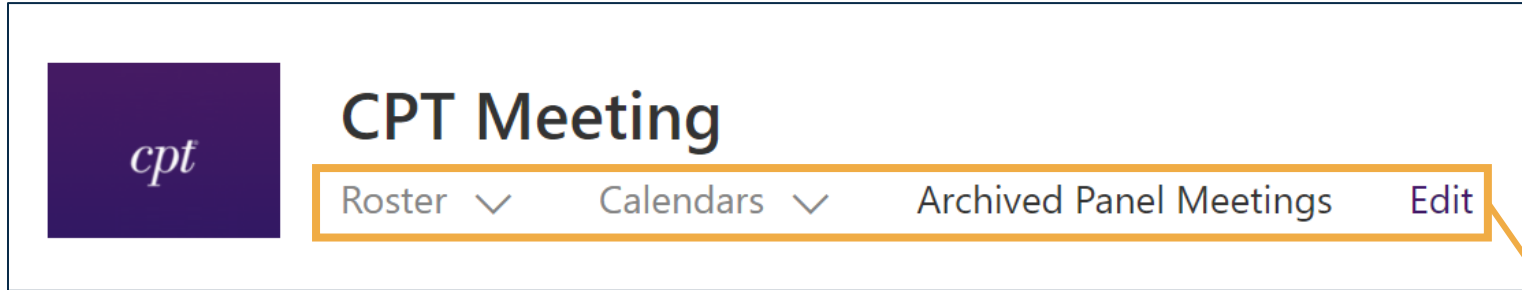
To access the links, perform one of the following actions:

1. Click directly on the link if there is no arrow next to the link
2. Hover over the arrow next to the label to expand the menu, navigate to desired link, click on the link to open it

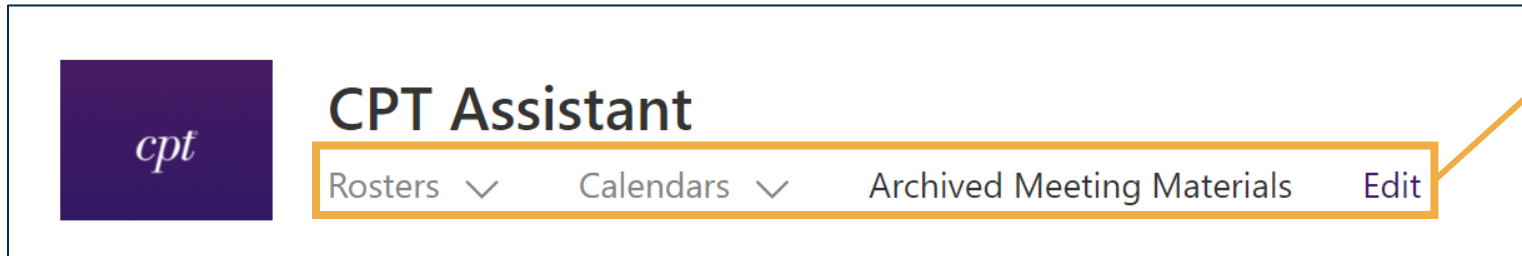


NAVIGATION

# Site Navigation



A screenshot of the CPT Meeting navigation menu. On the left is a dark purple square with the white text 'cpt'. To its right is the title 'CPT Meeting' in a large, bold, black font. Below the title is a horizontal navigation bar with four items: 'Roster' with a downward arrow, 'Calendars' with a downward arrow, 'Archived Panel Meetings', and 'Edit'. The entire navigation bar is enclosed in a thin orange border.



A screenshot of the CPT Assistant navigation menu. On the left is a dark purple square with the white text 'cpt'. To its right is the title 'CPT Assistant' in a large, bold, black font. Below the title is a horizontal navigation bar with four items: 'Rosters' with a downward arrow, 'Calendars' with a downward arrow, 'Archived Meeting Materials', and 'Edit'. The entire navigation bar is enclosed in a thin orange border.

The Site Navigation links are posted above the CPT Meeting and CPT Assistant homepage. In both locations, the links are posted to the right of the CPT logo

To access the links, perform one of the following actions:

1. Click directly on the link if there is no arrow next to the link (Archived links)
2. Hover over the arrow next to the labels to expand the menu, navigate to desired link, click on the link to open it

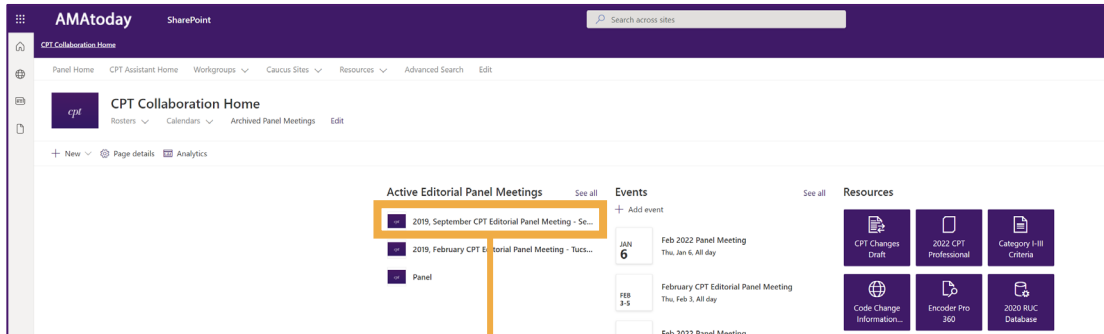


# Breadcrumbs



NAVIGATION

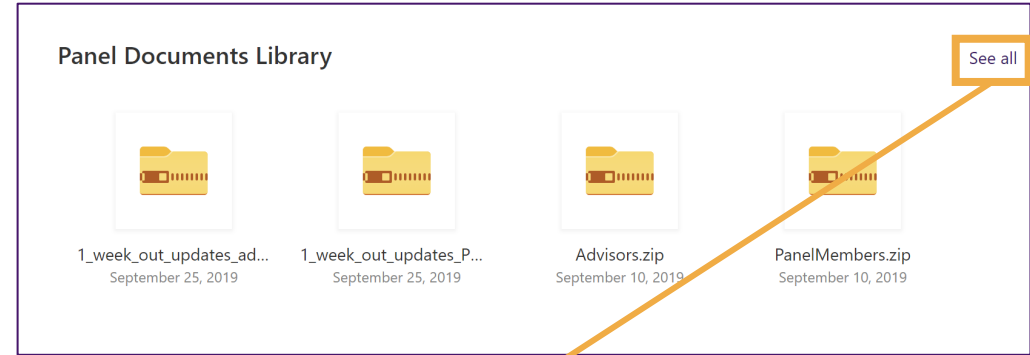
# Breadcrumbs Example (1/2)



**Step #1:** Click on a meeting posted in the “Active Editorial Panel Meetings” section

[CPT Collaboration Home](#) > [2019, September CPT Editorial Panel Meeting - Seattle, WA](#)

**Step #2:** Clicking on a meeting results in the following breadcrumbs being populated



**Step #3:** To populate additional breadcrumbs, select “See all” posted in the upper right corner of the “Panel Documents Library” section

[CPT Collaboration Home](#) > [2019, September CPT Editorial Panel Meeting - Seattle, WA](#) > [Panel Documents](#)

**Step #4:** Selecting “See all” results in the following breadcrumbs being populated



NAVIGATION

# Breadcrumbs Example (2/2)

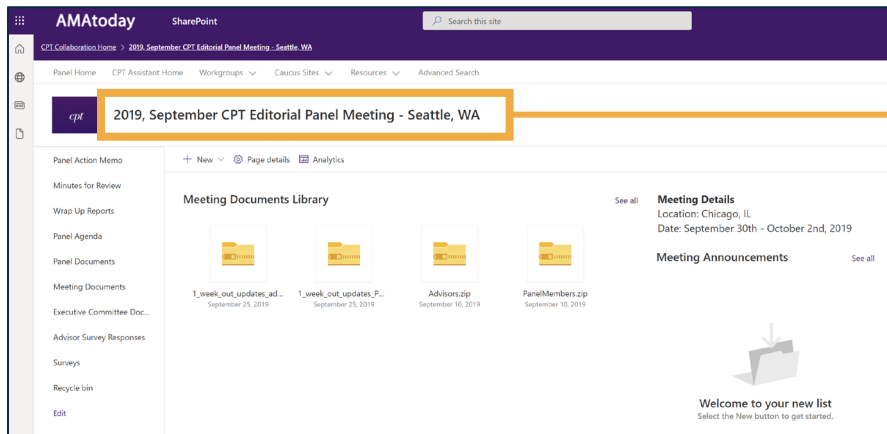
CPT Collaboration Home > 2019, September CPT Editorial Panel Meeting - Seattle, WA > Panel Documents

**Step #5:** To navigate back to the meeting homepage, click on the previous breadcrumb in the sequence. In this case, click on the breadcrumb labeled “2019, September CPT Editorial Panel Meeting – Seattle, WA”

CPT Collaboration Home > 2019, September CPT Editorial Panel Meeting - Seattle, WA

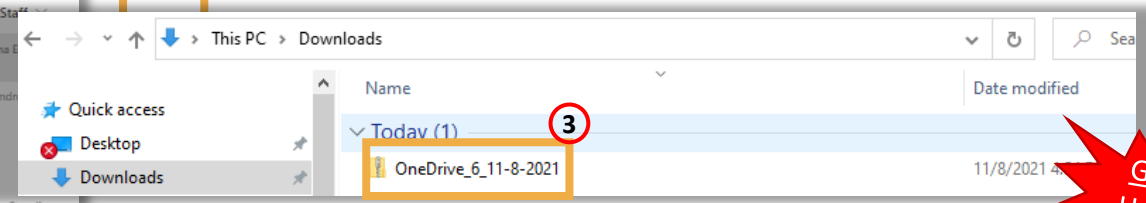
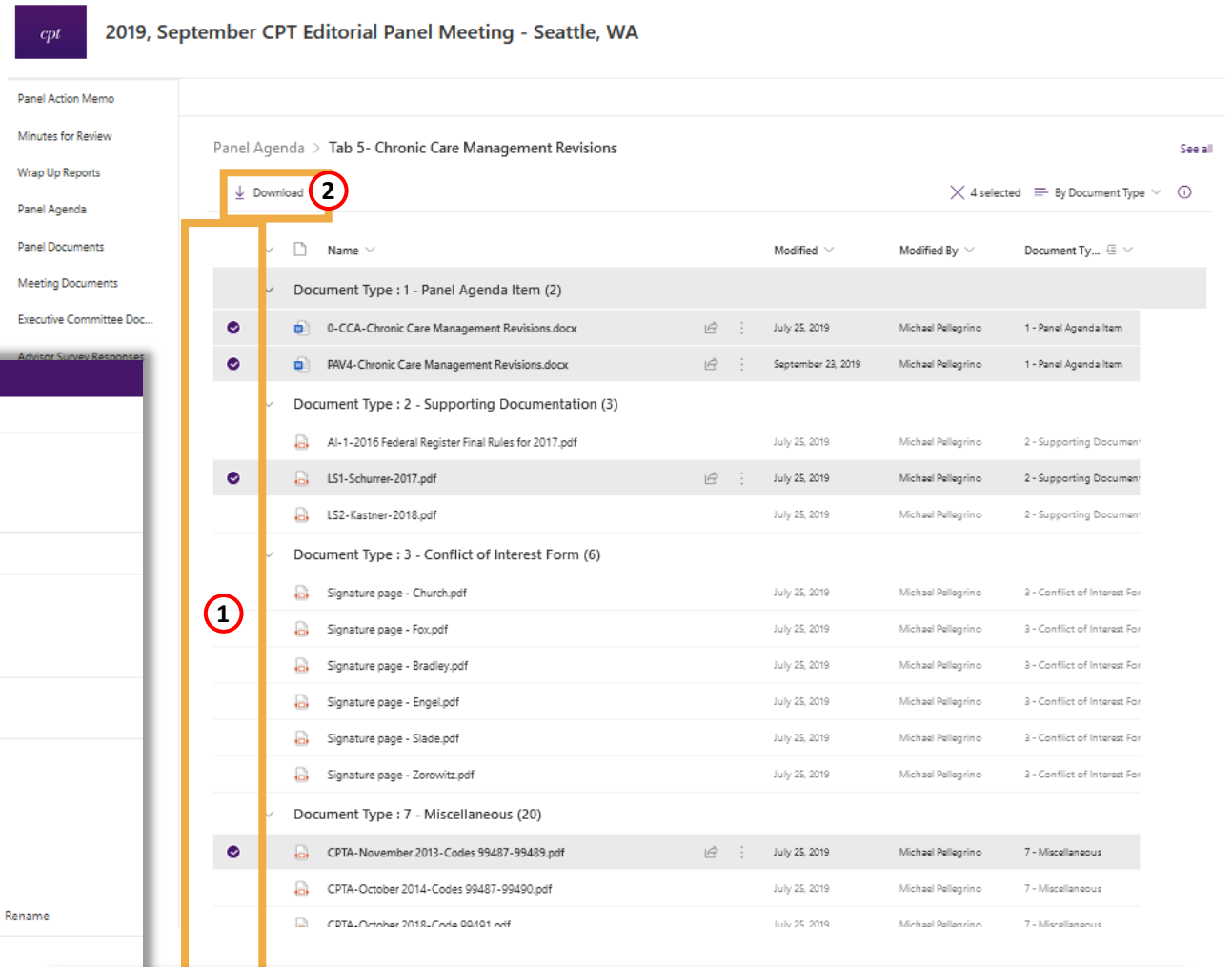
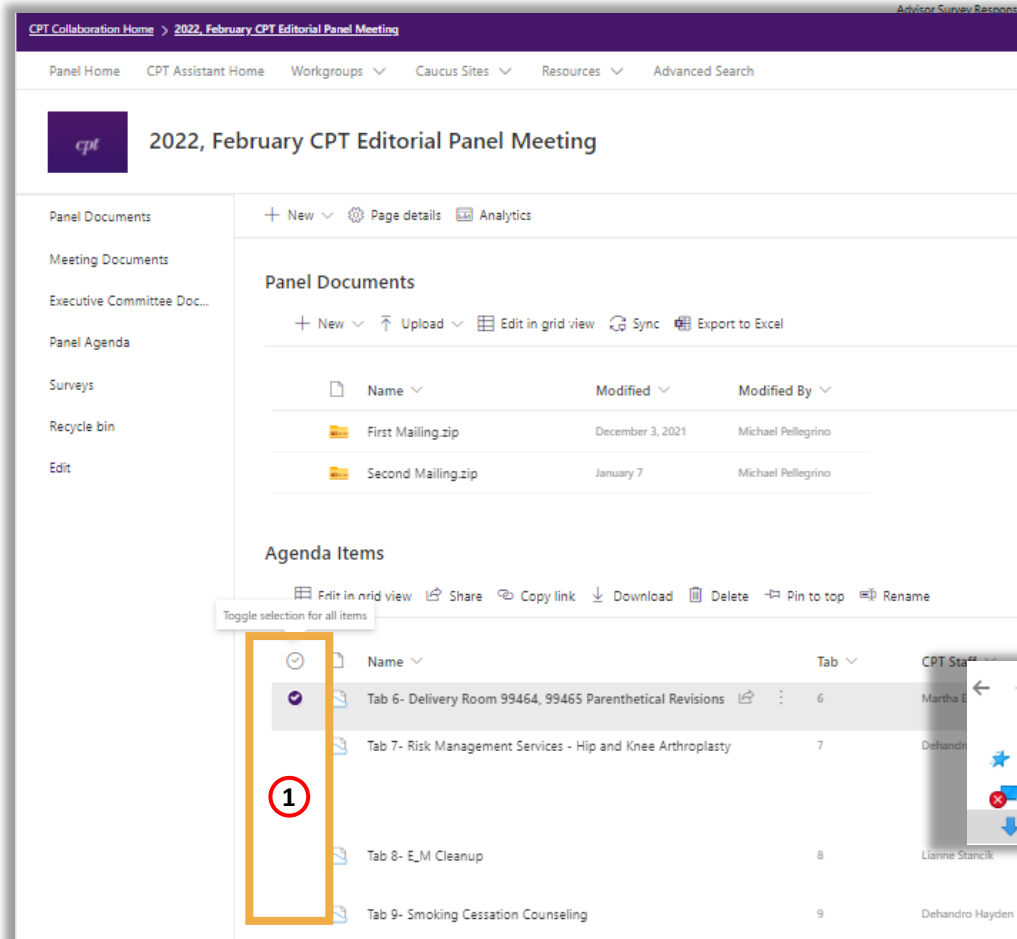
**Step #7:** Once back on the meeting homepage, the following breadcrumbs are populated

**Step #6:** Clicking on the breadcrumb in step #5 results in being directed to this page



# Downloading

1. Select folders or individual items by hovering over column to the left
2. Click Download
3. Zip file is downloaded to computer



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# CPT PANEL MEETING

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[CPT PANEL MEETING NAVIGATION](#)



CPT PANEL MEETING

# CPT Meeting Homepage

The screenshot shows the CPT Collaboration Home homepage. At the top is a purple navigation bar with the text "CPT Collaboration Home" and a list of menu items: "Panel Home", "Workgroups", "Caucus Sites", "Resources", and "Advanced Search". Below this is a secondary navigation bar with the "cpt" logo and "CPT Collaboration Home" text, followed by "Rosters", "Calendars", and "Archived Panel Meetings". The main content area is divided into three columns: "Active Editorial Panel Meetings" (with a "See all" link), "Events" (with an "Add event" link and a "See all" link), and "Resources" (a grid of nine resource tiles). At the bottom of the Events section are "Previous" and "Next" navigation arrows. Below the Resources section is an "Announcements" section with a "See all" link. A red starburst graphic with the text "Get Help" is located at the bottom right of the page.

The Events section contains a list of upcoming Panel events. Click on an event to view additional details. Can also click on "See all" to view all upcoming events, and can use the "Next" and "Previous" arrows at the bottom to view additional events

The Active Editorial Panel Meetings section contains the active meetings. Click on a meeting to view that meeting's page. Can also select "See all" to view all active meetings

The Resources Section on the CPT Meeting Homepage contains the most used links for ease of access. Click on a square to be directed to that resource

The Announcements section contains each of the announcements posted. Click on an announcement to view additional details.





# CPT Panel Meeting Navigation

The screenshot shows the SharePoint interface for the "2019, September CPT Editorial Panel Meeting - Seattle, WA". The left sidebar contains a navigation menu with items like "Panel Action Memo", "Minutes for Review", "Wrap Up Reports", "Panel Agenda", "Panel Documents", and "Meeting Documents". The main content area is divided into three sections: "Meeting Documents Library", "Meeting Details", and "Meeting Announcements".

**Meeting Documents Library**: Contains four zip files: "1\_week\_out\_updates\_ad...", "1\_week\_out\_updates\_P...", "Advisors.zip", and "PanelMembers.zip".

**Meeting Details**: Displays "Location: Chicago, IL" and "Date: September 30th - October 2nd, 2019".

**Meeting Announcements**: Features a "Welcome to your new list" message and a "Select the New button to get started." prompt.

**Panel Agenda**: A table with columns "Tab" and "Name".

Tab	Name
0	Tab 0- Onsite Options Template.url
1	Tab 1- Minutes from the May 2019 Meeting.url
2	Tab 2- Table of Contents.url

The Meeting Documents Library section contains all relevant meeting documents in zip files. Click on a zip file to download its contents

The Meeting Details section contains information for the meeting including the location and date(s)

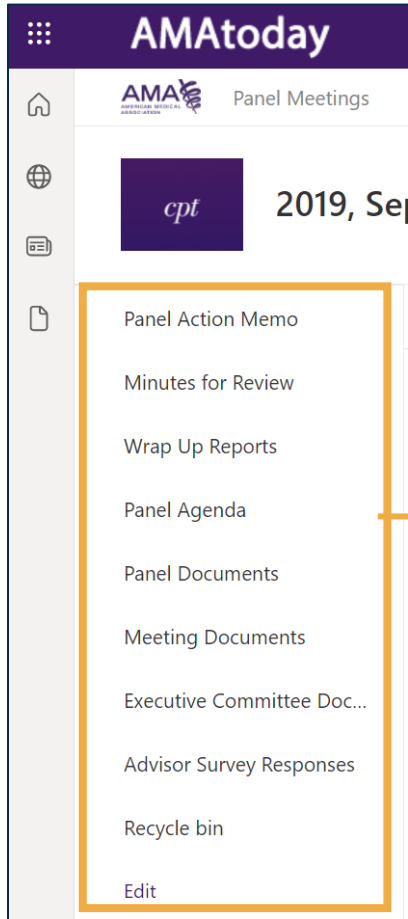
The Meeting Announcements section contains the announcements pertaining to that specific meeting. Click on an announcement to view additional details of the announcement

The Panel Agenda is posted at the bottom of the meeting page



CPT PANEL MEETING

# CPT Meeting Page Left-hand Navigation



The left-hand navigation posted on the CPT Meeting page contains links to resources/pages pertaining to the meeting

Different users will have access to the links, according to the permissions matrix to the right

Link	CPT Staff	Panel, Panel Staff	Advisor, Advisor Staff	Workgroup Member	Caucus Member
Panel Action Memo	Yes	Yes	No	No	No
Minutes for Review	Yes	Yes	No	No	No
Wrap Up Reports	Yes	Yes	No	No	No
Panel Agenda	Yes	Yes	Yes	No	No
Panel Documents	Yes	Yes	Yes	No	No
Meeting Documents	Yes	Yes	Partially	No	No
Executive Committee Documents	Yes	Yes	Partially	No	No
Advisor Survey Responses	Yes	See Only	Yes	No	No



# Panel Member Specific Navigation



# Homepage Panel Agenda View—Panel Members

Panel Agenda See all

Sync Export to Excel Default View

Tab	Name	Modified	CPT Applicants	Discussion
1	Tab 1- Onsite Options Template.url	November 17, 2020		
2	Tab 2- Minutes from the May 202...	November 17, 2020		
3	Tab 3- Table of Contents.url	November 17, 2020		
4	Tab 4- RUC Referrals.url	November 17, 2020		
5	Tab 5- Lab Grid.url	November 17, 2020		
5.5	Tab 5.5- Tab Test Ted 5	October 22		<a href="#">View Discussion</a>
6	Tab 6- Appropriate Use Criteria C...	Tuesday at 9:19 AM	<strong>Jeanine Engel, MD Brian Outland, MD</strong>  <strong>American College of Physicians	<a href="#">View Discussion</a>
7	Tab 7- Telephone E_M Services- ...	October 6	<strong>Jeannine Engel, MD Brian Outland, MD</strong> <strong>American College of Physicians	<a href="#">View Discussion</a>
8	Tab 8- Remote Patient Education-...	Tuesday at 9:18 AM	<strong>Brittney Cini</strong> <strong>Confirmed Consent	<a href="#">View Discussion</a>
9	Tab 9- Remote Critical Care Servic...	Tuesday at 10:31 AM	<strong>Martin Doerfler</strong> <strong>Northwell Health  <strong>Ann Mond Johnson</strong> <strong>American Telemedicine Association  <strong>Benjamin Scott</strong> <strong>University of Colorado School of Medicine  	<a href="#">View Discussion</a>

This will be the view of the Panel Agenda posted on the meeting homepage. There is no Survey Response Button, there is a modified date to help with sorting on recently modified and there is more metadata



# CPT Meeting Page- Panel Agenda Panel Detail View

AMAtoday

Panel Meetings

2019, Sep

- Panel Action Memo
- Minutes for Review
- Wrap Up Reports
- Panel Agenda**
- Panel Documents
- Meeting Documents
- Executive Committee Doc...
- Advisor Survey Responses
- Recycle bin
- Edit

**Step #1:** Click on the Panel Agenda link posted in the left-hand navigation. This link is audience targeted. Depending on your user group, you will be directed to the view posted to the right.

Code Changes Documentation Library

Name	Tab	CPT Staff	Panel Assigned - Primary	Panel Assigned - 2nd	Onsite O...	PAV Version	CPT Applicants
Tab 0- Onsite Options Template.url	0						
Tab 1- Minutes from the May 2019 Meeting.url	1						
Tab 2- Table of Contents.url	2						
Tab 3- RUC Referrals.url	3						
Tab 4- Lab Grid.url	4						
Tab 5- Chronic Care Management Revisions	5	Jennifer Bell	Dr. O'Connell	Dr. Vorenkamp		PAV3	Bradley Fox, MD Samuel L. Church, MD American Academy of Family Physicians  Joel Bradley, MD Renee Slade, MD American Academy of Pediatrics  Jeannine Engel, MD American College of Physicians  Robert Zorowitz, MD American Geriatrics Society
Tab 6- Socioeconomic and Psychosocial Health Services- WITHDRAWN	6	Lianne Stancik	Dr. O'Connell	Dr. Kanter		PAV3	Jeffrey D. Sedlack, MD Alaska Health Services, LLC
Tab 7- Tissue Expander Placement-Revise 11960	7	Thilani Attale	Dr. Barney	Dr. O'Connell		PAV3	Dan Ness, MD Jeff Kozlow, MD American Society of Plastic Surgeons
Tab 8- Posterior Lumbar Arthrodesis and Decompression	8	Desiree Evans	Dr. Hambrick	Dr. Barney		B-172	Joseph S. Cheng, MD Henry H. Woo, MD American Association of Neurological Surgeons

CPT Staff and Panel Members are able to view all metadata.

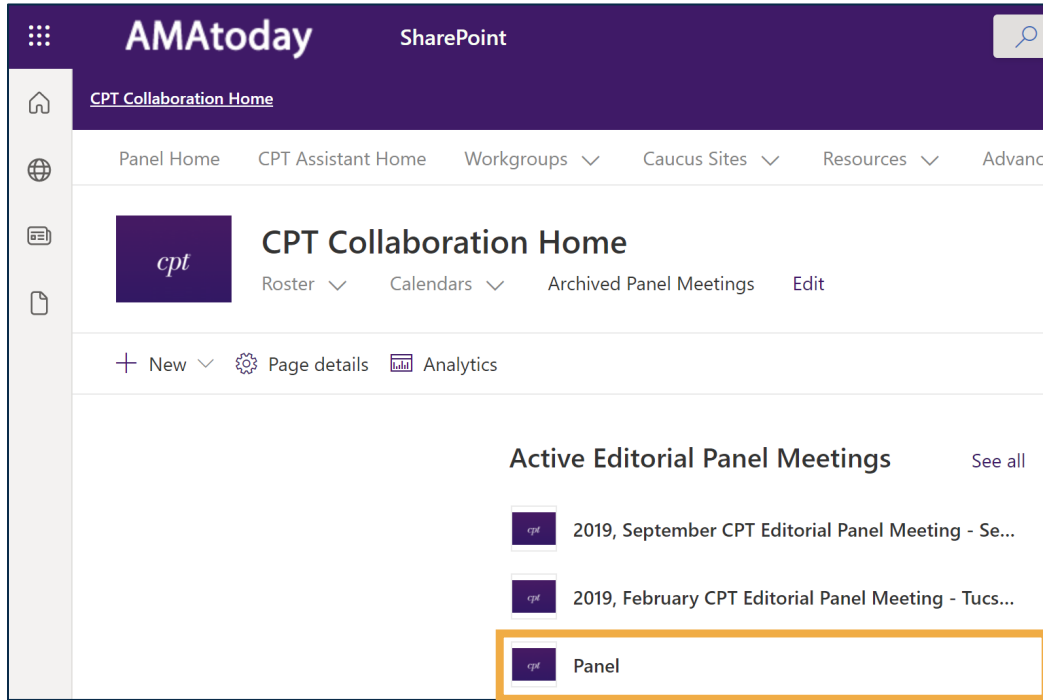


# Viewing Survey Responses

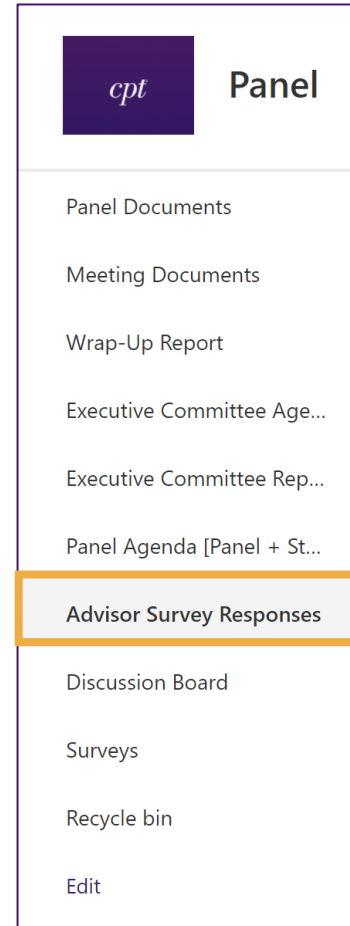


CPT PANEL MEETING-Viewing surveys

# View Survey Responses (1/3)



**Step #1:** Navigate to the meeting that the survey responses are to be viewed for from the CPT Collaboration Home



**Step #2:** Once on the desired meeting page, navigate to the left-hand navigation and select the link "Advisor Survey Responses"



CPT PANEL MEETING-Viewing surveys

# View Survey Responses (2/3)

The screenshot shows the 'Advisor Survey Responses' section of the CPT Panel interface. It features a table with the following columns: Full Tab Name, Created By, Modified, Specialty Society, Would Like to Respond, Specialty Level of Support, Personal or Spe..., Level of ..., Revised Language or Comment, General Criteria..., and Category 1 Crite... The table lists several survey tabs, including 'Tab # : 006 (Appropriate Use Criteria Consultation- WITHDRAWN) (1)', 'Tab # : 007 (Telephone E/M Services- WITHDRAWN) (2)', 'Tab # : 011 (Remote Respiratory Status Monitoring Services) (1)', 'Tab # : 012 (Remote Physiologic and Clinical Data Monitoring - Revise 99091) (1)', and 'Tab # : 027 (Drug Induced Sleep Endoscopy (DISE)) (1)'. Each tab entry includes details such as the creator's name, the modification date, the specialty society, and the response status.

**Step #3:** View the survey responses, grouped by tab and arranged in numerical order. Scroll to the right to view all columns

**(Optional) Step #4:** Can click on an arrow next to a tab name to expand or condense all individual responses for that tab

This close-up view shows the 'Advisor Survey Responses' table with the following columns: Full Tab Name, Created By, Modified, Specialty Society, and Would Like to Respond. The entry for 'Tab # : 007 (Telephone E/M Services- WITHDRAWN) (2)' is highlighted, and a small arrow icon next to it is circled in orange, indicating its function to expand or condense the responses for that specific tab.





CPT PANEL MEETING-Viewing surveys

# View Survey Responses (3/3)

Advisor Survey Responses ☆

Full Tab Name	Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support	Personal or Spe...
Tab # : 007 (Telephone E/M Services- WITHDRAWN) (2)						
Tab 7 - Telephone E/M Services- WITHDRAWN	Ted Nubel	December 7	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications	Personal
Tab 7 - Telephone E/M Services- WITHDRAWN	ccattest5	5 hours ago	American Society for Dermatologic Surgery	Yes	Does Not Support	Personal

**Step #5:** To view all responses for a tab in further detail, click directly on the name of the tab

Advisor Survey Responses ☆ > 007 (Telephone E/M Services- WITHDRAWN)

Full Tab Name	Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support	Personal or Spe...	Level of ...
Tab 7 - Telephone E/M Services- WITHDRAWN	Ted Nubel	December 7	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications	Personal	
Tab 7 - Telephone E/M Services- WITHDRAWN	ccattest5	5 hours ago	American Society for Dermatologic Surgery	Yes	Does Not Support	Personal	New Revised Language or Ballot for Proposed Code Changes

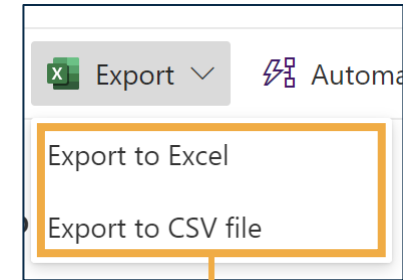
**Step #6:** View all responses for that tab, and only for that tab



CPT PANEL MEETING-Viewing surveys

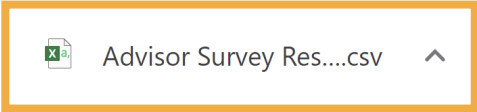
# Download Survey Responses

Full Tab Name	Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support
Tab # : 006 (Appropriate Use Criteria Consultation- WITHDRAWN) (1)					
Tab 6 - Appropriate Use Criteria Consultation- WITHDRAWN	Cole Mitchell	Yesterday at 4:03 PM	American Academy of Audiology	Yes	Comment Only
Tab # : 007 (Telephone E/M Services- WITHDRAWN) (2)					
Tab 7 - Telephone E/M Services- WITHDRAWN	Ted Nubel	Tuesday at 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
Tab 7 - Telephone E/M Services- WITHDRAWN	ccattest5	Tuesday at 8:38 AM	American College of Chest Physicians	Yes	Does Not Support
Tab # : 011 (Remote Respiratory Status Monitoring Services) (1)					
Tab 11 - Remote Respiratory Status Monitoring Services	ccattest5	Monday at 5:27 PM	American Academy of Dermatology	Yes	Comment Only
Tab # : 012 (Remote Physiologic and Clinical Data Monitoring Device 99091) (1)					



**Step #1:** Navigate to view the Advisor Survey Responses page (accessed via left navigation link)

**Step #2:** Hover over the arrow next to “Export” and select either “Export to Excel” or “Export to CSV file”



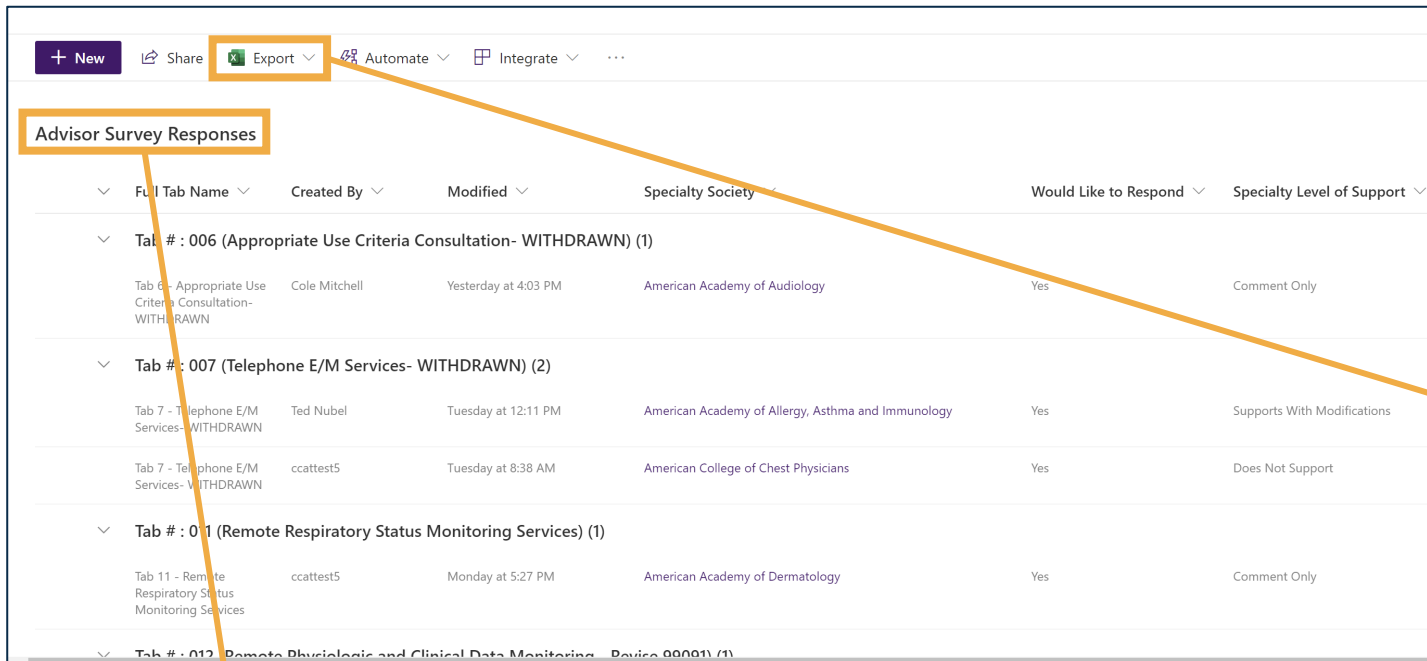
**Step #3:** Open the downloaded file to view all survey responses in Excel



CPT PANEL MEETING-Viewing surveys

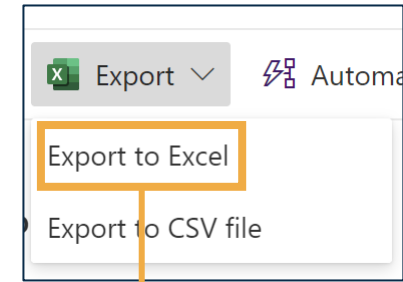
# Filter by Tab in Excel (1/2)

To view the downloaded responses for **only one tab** in Excel, follow the steps below:



The screenshot shows the 'Advisor Survey Responses' page. The 'Export' button in the top navigation bar is highlighted with an orange box. An orange arrow points from this button to the 'Export to Excel' option in the dropdown menu shown in the next step.

Full Tab Name	Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support
<b>Tab # : 006 (Appropriate Use Criteria Consultation- WITHDRAWN) (1)</b>					
Tab 6 - Appropriate Use Criteria Consultation- WITHDRAWN	Cole Mitchell	Yesterday at 4:03 PM	American Academy of Audiology	Yes	Comment Only
<b>Tab # : 007 (Telephone E/M Services- WITHDRAWN) (2)</b>					
Tab 7 - Telephone E/M Services- WITHDRAWN	Ted Nubel	Tuesday at 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
Tab 7 - Telephone E/M Services- WITHDRAWN	ccattest5	Tuesday at 8:38 AM	American College of Chest Physicians	Yes	Does Not Support
<b>Tab # : 011 (Remote Respiratory Status Monitoring Services) (1)</b>					
Tab 11 - Remote Respiratory Status Monitoring Services	ccattest5	Monday at 5:27 PM	American Academy of Dermatology	Yes	Comment Only
<b>Tab # : 012 (Remote Physiologic and Clinical Data Monitoring - Device 99091) (1)</b>					



**Step #2:** Hover over the arrow next to "Export" and select "Export to Excel"

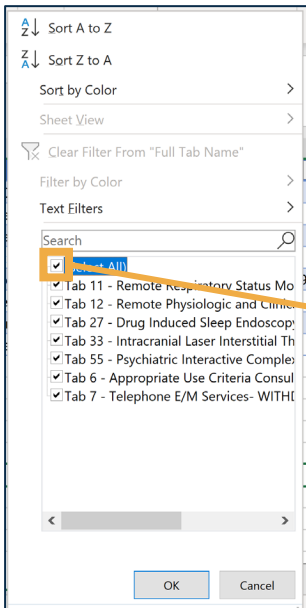
**Step #1:** Navigate to view the Advisor Survey Responses page (accessed via left navigation link)



CPT PANEL MEETING-Viewing surveys

# Filter by Tab in Excel (2/2)

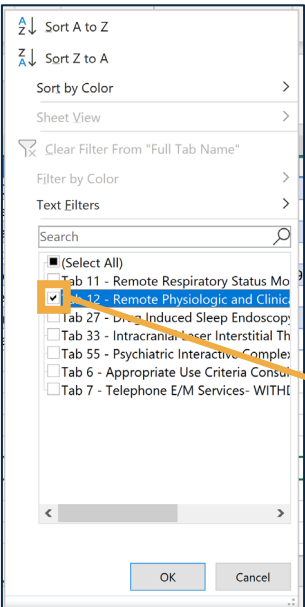
1	Full Tab Name	Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level
2	Tab 6 - Appropriate Use Criteria Consultation- WITHDRAWN	Cole Mitchell	12/9/2021 12:53	American Academy of Allergy, Asthma and Immunology	Yes	
3	Tab 7 - Telephone E/M Services- WITHDRAWN	Ted Nubel	12/7/2021 12:11	American Academy of Allergy, Asthma and Immunology	Yes	Supports With M
4	Tab 7 - Telephone E/M Services- WITHDRAWN	ccattest5	12/7/2021 8:38	American College of Chest Physicians	Yes	Does Not Suppo
5	Tab 11 - Remote Respiratory Status Monitoring Services	ccattest5	12/6/2021 17:27	American Academy of Dermatology	Yes	Comment Only
6	Tab 12 - Remote Physiologic and Clinical Data Monitoring - Revise 9909	ccattest5	12/8/2021 9:45	American Academy of Child and Adolescent Psychiatry	Yes	Supports As Sub
7	Tab 27 - Drug Induced Sleep Endoscopy (DISE)	ccattest5	12/6/2021 17:26	American Physical Therapy Association	Yes	Supports With M
8	Tab 33 - Intracranial Laser Interstitial Thermal Therapy (LITT)	ccattest5	12/7/2021 8:35	American Society for Metabolic and Bariatric Surgery	Yes	Supports With M
9	Tab 55 - Psychiatric Interactive Complexity Instructions	ccattest5	12/6/2021 17:27	American Academy of Child and Adolescent Psychiatry	Yes	Supports As Sub



**Step #5:** Uncheck "Select All"

**Step #4:** Click on the arrow next to the "Full Tab Name" column

**Step #3:** Open the downloaded Excel file



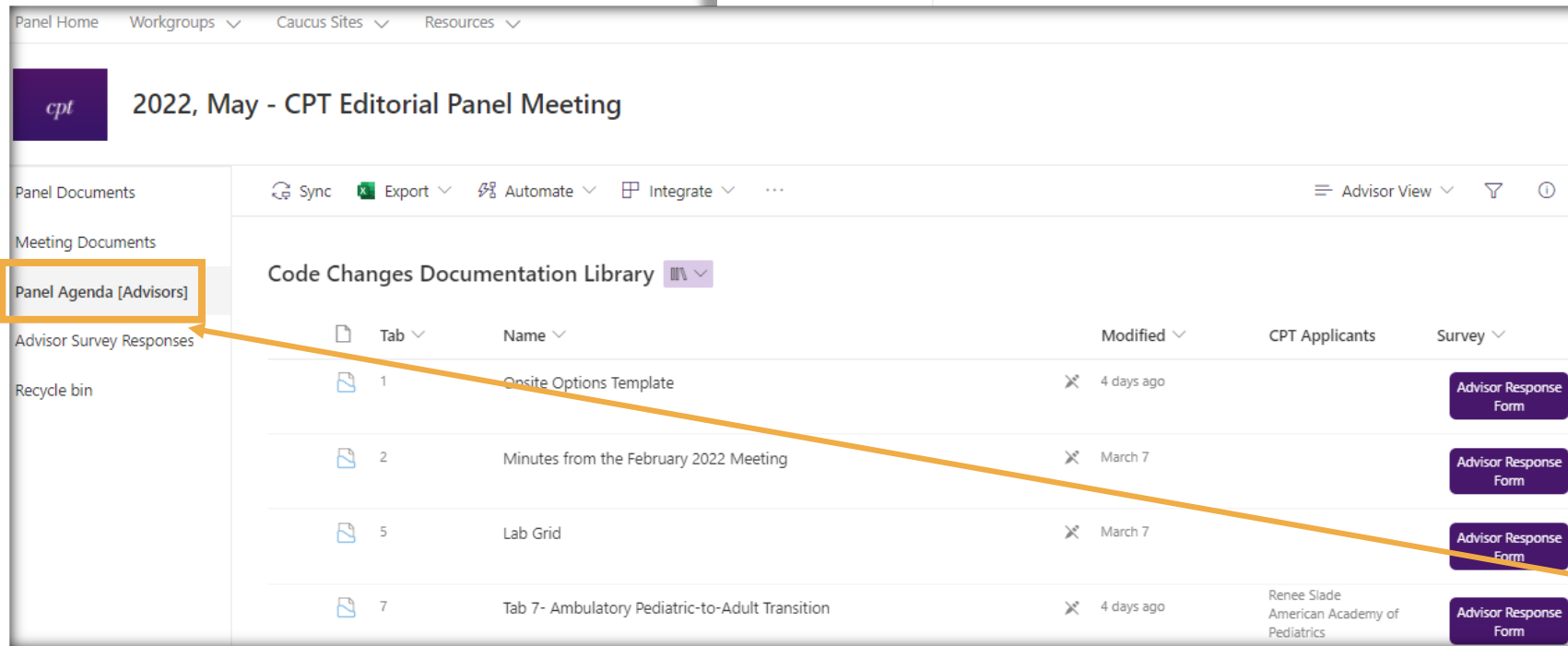
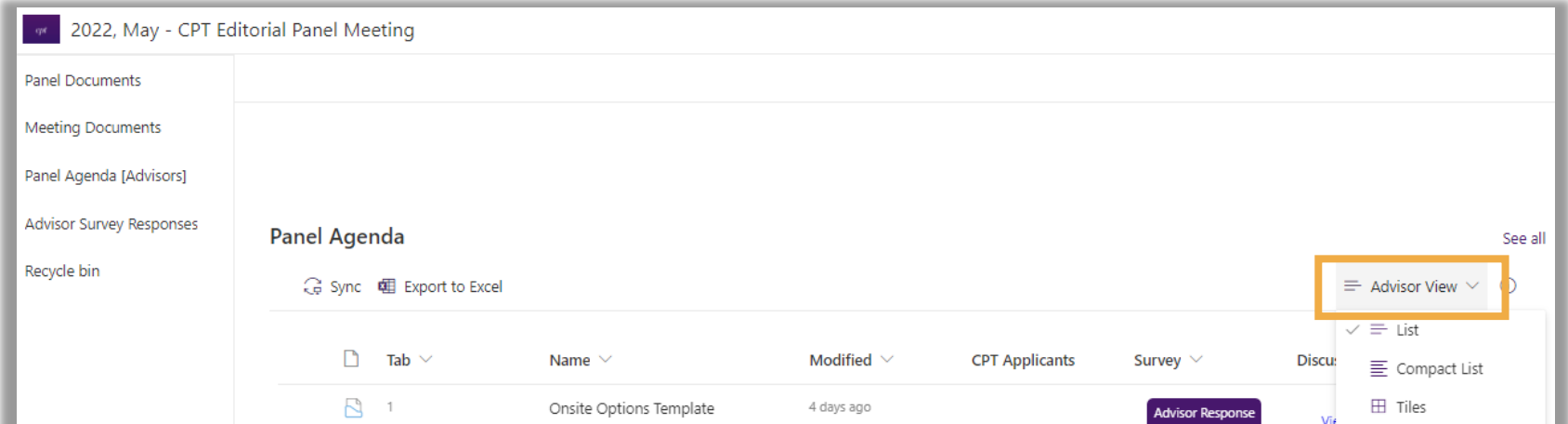
**Step #6:** Check the desired tab(s) to view the responses and select "OK" when complete to view the filtered results



# Advisor Specific Navigation



# Advisor Survey Access

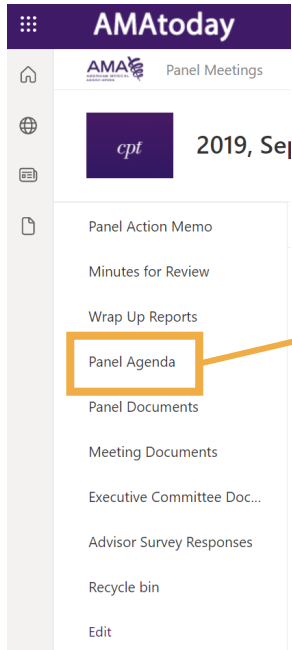


Change "View" from "Default" to "Advisor" on Main Page

OR

Select "Panel Agenda [Advisors]" in left Nav

# CPT Meeting Page- Panel Agenda Advisor Detail View



**Step #1:** Click on the Panel Agenda link posted in the left-hand navigation. This link is audience targeted. Depending on your user group, you will be directed to the view to the right.

Code Changes Documentation Library

Tab	Name	CPT Applicants	Survey
0	Tab 0- Onsite Options Template.url		
1	Tab 1- Minutes from the May 2019 Meeting.url		
2	Tab 2- Table of Contents.url		
3	Tab 3- RUC Referrals.url		
4	Tab 4- Lab Grid.url		
5	Tab 5- Chronic Care Management Revisions	Bradley Fox, MD Samuel L. Church, MD American Academy of Family Physicians  Joel Bradley, MD Renee Slade, MD American Academy of Pediatrics  Jeannine Engel, MD American College of Physicians  Robert Zorowitz, MD American Geriatrics Society  Jeffrey D. Sedlack, MD Alaska Health Services, LLC	Advisor Response Form
6	Tab 6- Socioeconomic and Psychosocial Health Services- WITHDRAWN	Dan Ness, MD Jeff Kozlow, MD American Society of	Advisor Response Form
7	Tab 7- Tissue Expander Placement-Revise 11960		Advisor Response Form

**Result #1:** Advisors are able to view and access the Advisor Response Form link



CPT PANEL MEETING-Advisor View

# CPT Meeting Survey (1/2)

Tab	Name	CPT Applicants	Survey
0	Tab 0- Onsite Options Template.url		
1	Tab 1- Minutes from the May 2019 Meeting.url		
2	Tab 2- Table of Contents.url		
3	Tab 3- RUC Referrals.url		
4	Tab 4- Lab Grid.url		
5	Tab 5- Chronic Care Management Revisions	Bradley Fox, MD Samuel L. Church, MD American Academy of Family Physicians	Advisor Response Form
		Joel Bradley, MD Renée Slade, MD American Academy of Pediatrics	
		Jeanine Engel, MD American College of Physicians	
6	Tab 6- Socioeconomic and Psychosocial Health Services- WITHDRAWN	Robert Zorowitz, MD American Geriatrics Society Jeffrey D. Sedlack, MD Alaska Health Services, LLC	Advisor Response Form
7	Tab 7- Tissue Expander Placement-Revise 11960	Dan Niess, MD Jeff Kozlow, MD American Society of	Advisor Response Form

**Step #1:** If you are an Advisor, click on the Advisor Response Form posted on the Panel Agenda

**Step #2:** Once viewing the Advisor Response Form, scroll to the bottom and select "Start"

### Advisor Response Form

Advisor Response Survey - CPT Survey Form

**You are about to take the Advisor Response Survey for Tab 7- Telephone E/M Services- WITHDRAWN.**

**CRITERIA FOR DEVELOPMENT AND EVALUATION OF CPT® CATEGORY I AND CATEGORY III CODES**

**Application Submission Requirements:**  
All CPT code change applications are reviewed and evaluated by CPT staff, the CPT/HCPAC Advisory Committee, and the CPT Editorial Panel. Strict conformance with the following is required for review of a code change application:

- Submission of a complete application, including all necessary supporting documents;
- Adherence to all posted deadlines;
- Cooperation with requests from CPT staff and/or Editorial Panel members for clarification and information; and
- Compliance with CPT Lobbying Policy.

**GENERAL CRITERIA FOR CATEGORY I AND CATEGORY III CODES**  
All Category I or Category III code change applications must satisfy each of the following criteria:

- The proposed descriptor is unique, well-defined, and describes a procedure or service which is clearly identified and distinguished from existing procedures and services already in CPT;
- The descriptor structure, guidelines and instructions are consistent with current Editorial Panel standards for maintenance of the code set;
- The proposed descriptor for the procedure or service is neither a fragmentation of an existing procedure or service nor currently reportable as a complete service by one or more existing codes (with the exclusion of unlisted codes). However, procedures and services frequently performed together may require new or revised codes;
- The structure and content of the proposed code descriptor accurately reflects the procedure or service as typically performed. If always or frequently performed with one or more other procedures or services, the descriptor structure and content will reflect the typical combination or complete procedure or service;
- The descriptor for the procedure or service is not proposed as a means to report extraordinary circumstances related to the performance of a procedure or service already described in the CPT code set; and
- The procedure or service satisfies the category-specific criteria set forth below.

**CATEGORY SPECIFIC REQUIREMENTS**

**A. CATEGORY I CRITERIA**  
A proposal for a new or revised Category I code **must** satisfy all of the following criteria:

- All devices and drugs necessary for performance of the procedure or service have received FDA clearance or approval when such is required for performance of the procedure or service;
- The procedure or service is performed by many physicians or other qualified health care professionals across the United States;
- The procedure or service is performed with frequency consistent with the intended clinical use (i.e., a service for common condition should have high volume, whereas a service commonly performed for a rare condition may have low volume);
- The procedure or service is consistent with current medical practice;
- The clinical efficacy of the procedure or service is documented in literature that meets the requirements set forth in the CPT code change application.

**B. CATEGORY III CRITERIA**  
The following criteria are used by the CPT/HCPAC Advisory Committee and the CPT Editorial Panel for evaluating Category III code applications:

- The procedure or service is currently or recently performed in humans; **AND at least one of the following additional criteria has been met:**
- The application is supported by at least one CPT or HCPAC advisor representing practitioners who would use this procedure or service; **OR**
- The actual or potential clinical efficacy of the specific procedure or service is supported by peer reviewed literature which is available in English for examination by the Editorial Panel; **OR**
- There is a) at least one Institutional Review Board approved protocol of a study of the procedure or service being performed, b) a description of a current and ongoing United States trial outlining the efficacy of the procedure or service, or c) other evidence of evolving clinical utilization.

**Start**

Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support
Ted Nubel	12/7/2021 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
ccattest5	12/16/2021 3:49 PM	American Society for Dermatologic Surgery	Yes	Does Not Support





CPT PANEL MEETING-Advisor View

# Completing the CPT Meeting Survey (2/2)

**Advisor Response Form**

**Tab 7 - Telephone E/M Services- WITHDRAWN**  
**Advisor Response Survey - CPT Survey Form**

You can review the criteria using the (i) icon to the upper right.

Question 1: Please select the specialty society to which you belong. \*

American Society for Dermatologic Surgery

Question 2: Would you like to respond to this issue? \*

Yes  
 No

Last saved at 12/16/2021, 9:26:08 AM.

**Next** **Save and Close** **Cancel**

Created By	Modified	Specialty Society	Would Like to Respo...	Specialty Level of Support
Ted Nubel	12/17/2021 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
cattest5	12/16/2021 9:26 AM	American Society for Dermatologic Surgery	Yes	Does Not Support

**Step #3:** Answer each question as they appear

**Step #4:** To move to the next page of questions, select the "Next" button in the bottom right corner

**(Optional) Step #5:** To exit the survey and save your progress at any point throughout the survey, select "Save and Close" in the bottom right corner

**Step #6:** Once all questions have been answered, select "Save and Close" in the bottom right corner to submit the responses

**Advisor Response Form**

**Tab 7 - Telephone E/M Services- WITHDRAWN**  
**Advisor Response Survey - CPT Survey Form**

Question 10a: Interests.

**Definitions:** Disclosable individual interest- cash, goods or other value, with respect to you or your immediate family, where the receipt or promise of which is related to the activities of the Editorial Panel, which in the aggregate exceeds \$1,000 within the past two years or is reasonably expected to exceed \$1,000 in the next two years

Disclosable corporate interest- cash, goods or other value, which in the aggregate exceeds \$5,000 within the past two years or is reasonably expected to exceed \$5,000 in the next two years

Material individual interest- a disclosable individual interest the value of which exceeds \$10,000 in the aggregate within the past two years

Material corporate interest- a disclosable corporate interest the value of which in the aggregate exceeds \$10,000 within the past two years or is reasonably expected to exceed \$10,000 in the next two years. \*

Disclosable Individual Interest  
 Disclosable Corporate Interest  
 Material Individual Interest  
 Material Corporate Interest  
 None

Question 10b: If you have any of the above interests, please explain below.

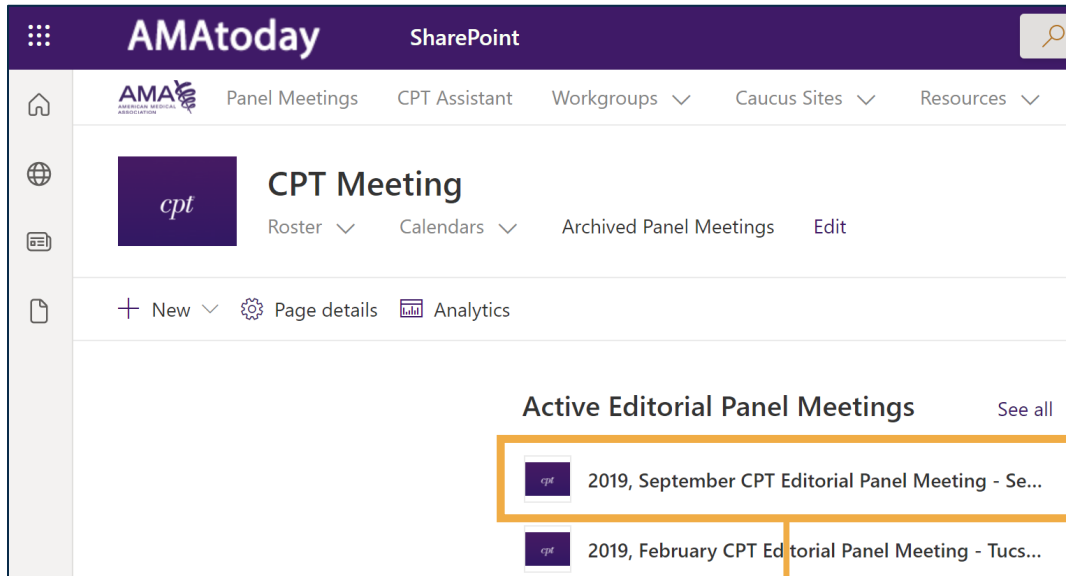
**Save and Close** **Cancel**

Created By	Modified	Specialty Society	Would Like to Respo...	Specialty Level of Support
Ted Nubel	12/17/2021 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
cattest5	12/16/2021 9:26 AM	American Society for Dermatologic Surgery	Yes	Does Not Support

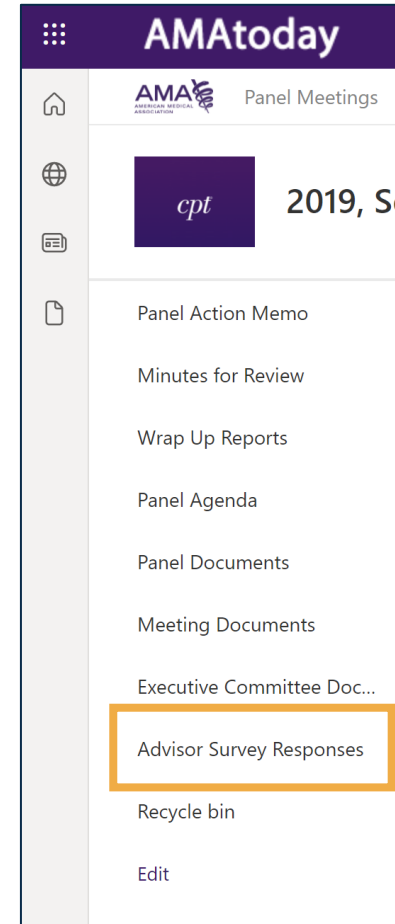


CPT PANEL MEETING-Advisor View

# View Survey Responses (1/2)



**Step #1:** Navigate to the meeting that the survey responses are to be viewed for from the CPT Meeting Homepage



**Step #2:** Once on the desired meeting page, navigate to the left-hand navigation and select the link "Advisor Survey Responses"



CPT PANEL MEETING-Advisor View

# View Survey Responses (2/2)

AMA Panel Meetings CPT Assistant Workgroups Caucus Sites Resources Advanced Search

**cpt** 2019, September CPT Editorial Panel Meeting - Seattle, WA

Panel Action Memo + New Share Export Automate Integrate

Minutes for Review

Wrap Up Reports

Panel Agenda

Panel Documents

Meeting Documents

Advisor Survey Responses ☆

>	Created By	Tab Name	Modified	Specialty Society	Would Like to ...	Specialty Level of Support
>		Tab Name : Tab 5- Chronic Care Management Revisions (3)				
>		Tab Name : Tab 8- Posterior Lumbar Arthrodesis and Decompression (1)				

**Step #4:** Click on an arrow next to a tab name to view all individual responses for that tab

**Step #3:** View the survey responses, grouped by tab and arranged in numerical order

Advisor Survey Responses ☆

>	Created By	Tab Name	Modified	Specialty Society	Would Like to ...	Specialty Level of Support
▼		Tab Name : Tab 5- Chronic Care Management Revisions (3)				
	Ted Nubel	Tab 5- Chronic Care Mana	November 16	American Academy of Cos	Yes	Supports With Revisions
	Barbara Benstead	Tab 5- Chronic Care Mana	November 10	American Academy of Der	Yes	Supports With Revisions
	ccattest5	Tab 5- Chronic Care Mana	November 16	American College of Chest	Yes	Supports As Submitted
▼		Tab Name : Tab 8- Posterior Lumbar Arthrodesis and Decompression (1)				
	Joel Buishas	Tab 8- Posterior Lumbar A	November 10	American Academy of Alle	Yes	Supports As Submitted

Get Help

CPT PANEL MEETING-Advisor View

# CPT Meeting Survey Quick View (1/2)

The quick view of the survey results are posted in 3 locations:

1. On the survey landing page
2. On each survey page
3. On the survey completion page

**CATEGORY SPECIFIC REQUIREMENTS**

**A. CATEGORY I CRITERIA**  
A proposal for a new or revised Category I code **must** satisfy all of the following criteria:

- All devices and drugs necessary for performance of the procedure or service have received FDA clearance or approval when such is required for performance of the procedure or service;
- The procedure or service is performed by many physicians or other qualified health care professionals across the United States;
- The procedure or service is performed with frequency consistent with the intended clinical use (i.e., a service for common condition should have high volume, whereas a service commonly performed for a rare condition may have low volume);
- The procedure or service is consistent with current medical practice;
- The clinical efficacy of the procedure or service is documented in literature that meets the requirements set forth in the CPT code change application.

**B. CATEGORY III CRITERIA**  
The following criteria are used by the CPT/HCPAC Advisory Committee and the CPT Editorial Panel for evaluating Category III code applications:

- The procedure or service is currently or recently performed in humans; **AND at least one of the following additional criteria has been met:**
- The application is supported by at least one CPT or HCPAC advisor representing practitioners who would use this procedure or service; **OR**
- The actual or potential clinical efficacy of the specific procedure or service is supported by peer reviewed literature which is available in English for examination by the Editorial Panel; **OR**
- There is a) at least one Institutional Review Board approved protocol of a study of the procedure or service being performed, b) a description of a current and ongoing United States trial outlining the efficacy of the procedure or service, or c) other evidence of evolving clinical utilization.

[Start](#)

Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support
Ted Nubel	12/7/2021 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
ccattest5	12/15/2021 10:46 AM	American Society of Bariatric Physicians	Yes	Supports As Submitted

**Tab 7- Telephone E/M Services- WITHDRAWN**

**Advisor Response Survey - CPT Survey Form**

① You can review the criteria using the (i) icon to the upper right.

Question 1: Please select the specialty society to which you belong. \*

American Society of Bariatric Physicians

Question 2: Would you like to respond to this issue? \*

Yes  
 No

Last saved at 12/15/2021, 10:46:38 AM.

[Next](#) [Save and Close](#) [Cancel](#)

Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support
<input type="radio"/> Ted Nubel	12/7/2021 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
ccattest5	12/15/2021 10:46 AM	American Society of Bariatric Physicians	Yes	Supports As Submitted

**Advisor Response Form**

**Tab 7- Telephone E/M Services- WITHDRAWN**

**Advisor Response Survey - CPT Survey Form**

**Your response has been updated. You can now leave the page.**

Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support
Ted Nubel	12/7/2021 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
ccattest5	12/14/2021 5:16 PM	American Society of Bariatric Physicians	Yes	Supports As Submitted



CPT PANEL MEETING-Advisor View

# CPT Meeting Survey Quick View (2/2)

Additional notes about the survey quick view:

Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support
Ted Nubel	12/7/2021 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
ccattest5	12/15/2021 10:46 AM	American Society of Bariatric Physicians	Yes	Supports As Submitted

To adjust the width of the columns, hover the mouse between the two column names to be adjusted. When the bar (see left) appears, drag the bar to make the necessary adjustments

Created By	Modified	Specialty Society	Would Like to Respond	Specialty Level of Support
<input type="radio"/> Ted Nubel	12/7/2021 12:11 PM	American Academy of Allergy, Asthma and Immunology	Yes	Supports With Modifications
<input type="radio"/> ccattest5	12/15/2021 10:46 AM	American Society of Bariatric Physicians	Yes	Supports As Submitted

To view additional details about a particular survey response, click on the row of the response to view

Panel > Advisor Sur... > Item properties

- Content Type  
Agenda Item Survey Response
- Specialty Society \*  
American Academy of Allergy, Asthma and Immunology
- Agenda Item ID \*  
781
- Tab Name  
Tab 7- Telephone E/M Services- WITHDRAWN
- Would Like to Respond  
Yes
- Personal or Specialty Opinion  
Personal
- Specialty Level of Support  
Supports With Modifications
- Level of Alternative Options  
Select an option

**Note:** As a user progresses through the survey, the user will not see their response reflected in the quick view until the response is submitted and the page is refreshed



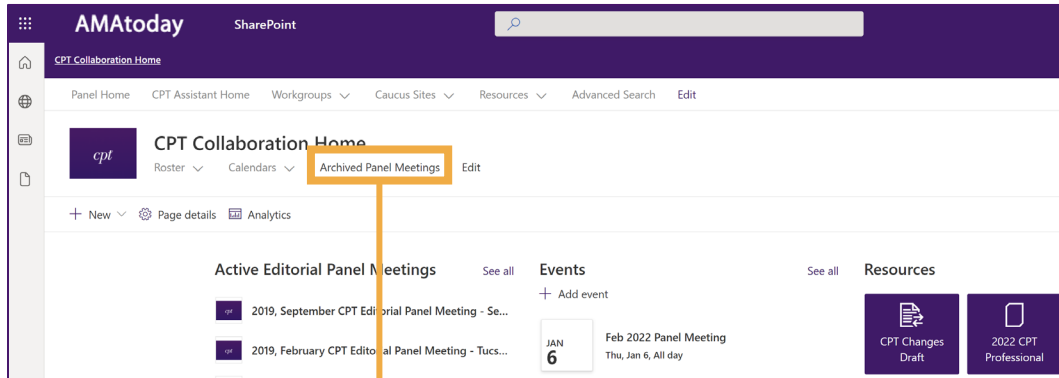
[TABLE OF CONTENTS](#)

# ARCHIVED- PANEL MEETINGS

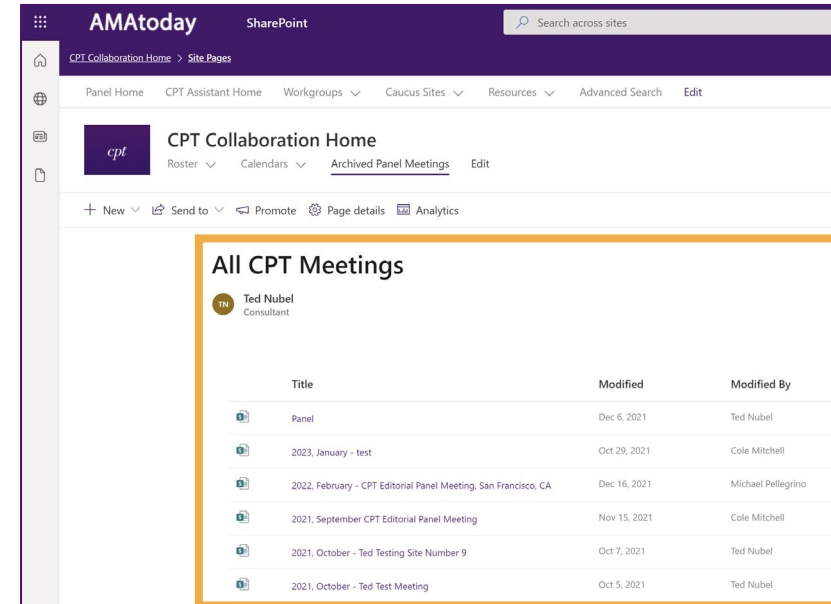
[ARCHIVED PANEL MEETINGS](#)



# Archived Panel Meetings



**Step #1:** From the CPT Collaboration Home, click on the “Archived Panel Meetings” link posted on the Site Navigation



**Step #2:** View the Archived CPT Meetings, with the meetings listed in descending order. Select a meeting to view that meeting’s contents



[TABLE OF CONTENTS](#)



# CPT ASSISTANT

[CPT ASSISTANT HOMEPAGE](#)

[CPT ASSISTANT MEETING  
NAVIGATION](#)

[CPT ASSISTANT NEWSLETTER](#)



# CPT Assistant Homepage

The screenshot shows the CPT Assistant homepage on the AMAtoday SharePoint site. The page features a navigation bar with 'AMAtoday' and 'SharePoint' logos, a search bar, and a main navigation menu with options like 'Panel Meetings', 'CPT Assistant', 'Workgroups', 'Caucus Sites', 'Resources', and 'Advanced Search'. Below the navigation, the page title is 'CPT Assistant' with sub-navigation for 'Rosters', 'Calendars', 'Archived Meeting Materials', and 'Edit'. The main content area is divided into four sections: 'Newsletters for Review', 'September 2021 CPT Assistant Editorial Board Meeting', 'Events', and 'Announcements'. Each section is highlighted with an orange border and has a callout box explaining its content. The 'Newsletters for Review' section shows a grid of newsletter cards for various dates. The 'September 2021 CPT Assistant Editorial Board Meeting' section displays a table of folders and documents. The 'Events' section lists upcoming meetings with dates and times. The 'Announcements' section shows a recent announcement card.

Name	Modified	Modified By
Agenda	October 5	Ryan Milton
Discussion of New Issues	October 6	Maddie Krueger
New Business	October 5	Ryan Milton
Old Business	October 5	Ryan Milton
Testing_RY	October 15	Rejina Young

The Newsletters for Review section contains the most recent, active newsletter sites for First and Second Pass. Can also select "See all" to view all active newsletter sites

The Active CPT Assistant Editorial Board Meeting section is posted on the CPT Assistant homepage. Click on a folder to view its contents. Can also select "See all" to view all materials

The Events section contains a list of the upcoming CPT Assistant events. Click on an event to view additional details. Can also select "See all" to view all upcoming events

The Announcements section contains recent announcements posted. Click onto an announcement to view additional details. Can also select "See all" to view all posted announcements



# CPT ASSISTANT MEETING NAVIGATION



CPT ASSISTANT MEETING

# CPT Assistant Mtg- Accessing Meeting Documents (1/2)

**Step #1:** From the CPT Assistant homepage, scroll toward the bottom of the page to view the current CPT Assistant Meeting materials

Select "See all" in the upper right corner of the section to further view the folders, documents, and materials

**Step #2:** After selecting "See all", click on the "Current" folder

Name	Modified	Modified By
Agenda	October 5	Ryan Milton
Discussion of New Issues	October 6	Maddie Krueger
New Business	October 5	Ryan Milton
Old Business	October 5	Ryan Milton
Testing_RY	October 15	Rejina Young

Name	Modified	Modified By
Archived	October 5	Ryan Milton
Current	October 5	Ryan Milton



CPT ASSISTANT MEETING

# CPT Assistant Mtg- Accessing Meeting Documents (2/2)

AMAtoday SharePoint Search this library

Panel Meetings CPT Assistant Workgroups Caucus Sites Resources Advanced Search

**CPT Assistant**  
Rosters Calendars Archived Meeting Materials Edit

+ New Upload Edit in grid view Share Copy link Sync Download Add shortcut to OneDrive

CPT Assistant Documents > Current

Name	Modified	Modified By
Agenda	October 5	Ryan Milton
Discussion of New Issues	October 6	Maddie Krueger
<b>New Business</b>	October 5	Ryan Milton
Old Business	October 5	Ryan Milton
Testing_RY	October 15	Rejina Young

**Step #3:** Navigate to the desired folder and select it to open it

**Step #4:** View the contents of the folder selected. Click on the name of a document to open it

AMAtoday SharePoint Search this library

Panel Meetings CPT Assistant Workgroups Caucus Sites Resources Advanced Search

**CPT Assistant**  
Rosters Calendars Archived Meeting Materials Edit

+ New Upload Edit in grid view Share Copy link Sync Download Add shortcut to OneDrive

CPT Assistant Documents > Current > **New Business**

Name	Modified	Modified By
<b>E00 CPTA April 2021 FAQ Correction Request (1).docx</b>	October 6	Maddie Krueger
E00a Letter to CPTA Requesting Correction to April 2021 ...	October 6	Maddie Krueger
E00b April 2021 CPTA 1st pass vs 2nd pass.docx	October 6	Maddie Krueger
E00d CPTA FAQ_AAOS, AOFAS, APMA edits in track chang...	October 6	Maddie Krueger
E00f EI 12762.docx	October 6	Maddie Krueger



CPT ASSISTANT MEETING

# Indication of New Documents

September 2021 CPT Assistant Editorial Board Meeting See all

+ New ▾ ↑ Upload ▾ 📄 Edit in grid view 📄 Share 🔗 Copy link ⋮ ☰ All Documents ▾ ⓘ

Name ▾	Modified ▾	Modified By ▾
📁 Agenda	October 5	Ryan Milton
📁 Agenda Items	December 8	Rejina Young
📁 Discussion of New Issues	3 minutes ago	Ted Nubel
📁 New Business	Yesterday at 5:04 PM	Ted Nubel

The “Modified” column posted in the Active CPT Assistant Editorial Board Meeting section indicates the last time any document in the folder was updated or added



# CPT ASSISTANT NEWSLETTER

[FIRST vs SECOND PASS](#)

[COMMENTING ON A DOCUMENT](#)

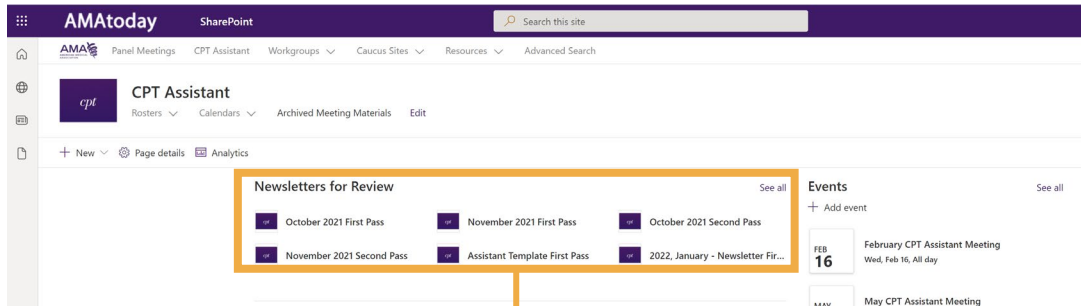
[DISCUSSION](#)

[COMMENT TRACKER](#)



CPT ASSISTANT NEWSLETTER FOLDERS

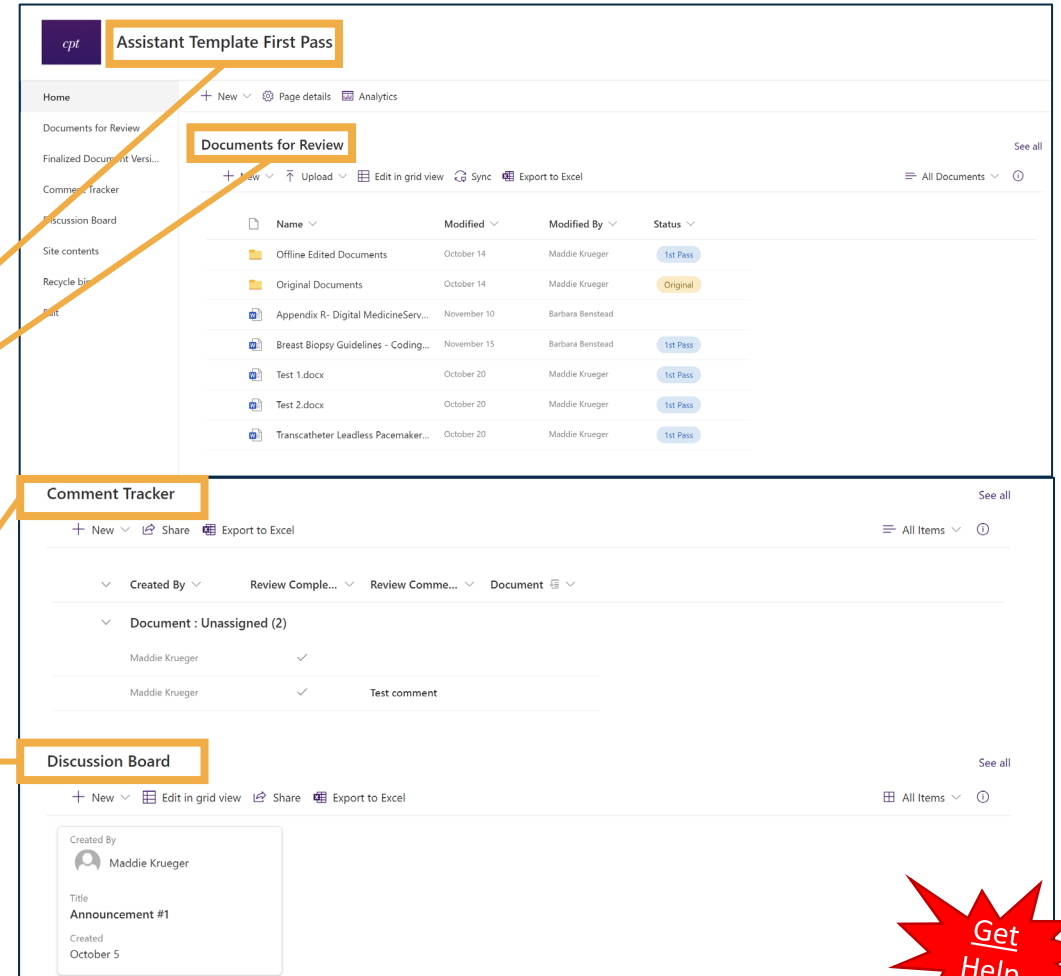
# CPT Assistant Newsletter Folders



**Step #1:** Click on the desired newsletter in the Newsletters for Review section

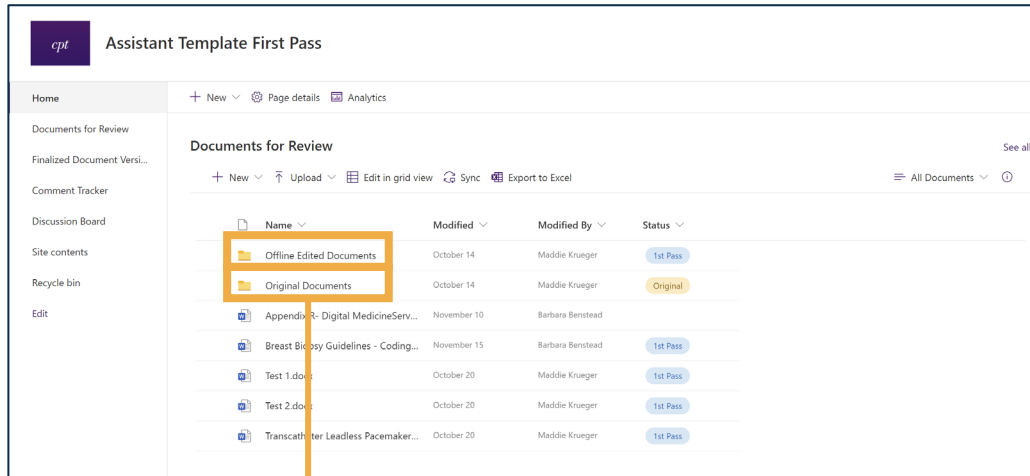
**Step #2:** View the specific CPT Assistant Site page and all the contents contained on the site. View the following sections:

1. Documents for Review
2. Comment Tracker
3. Discussion Board



CPT ASSISTANT NEWSLETTER FOLDERS

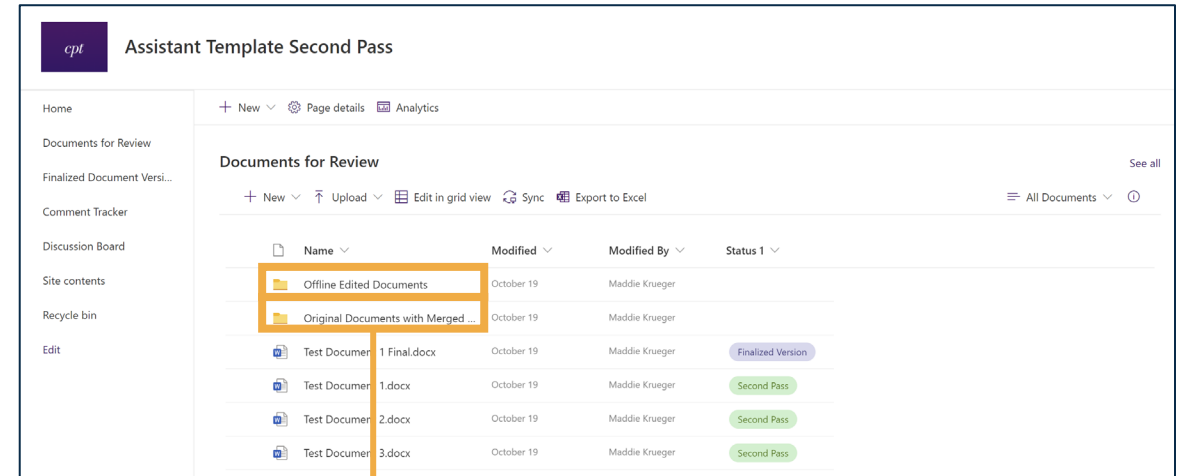
# CPT Assistant Newsletter- First vs. Second Pass (1/2)



For the First Pass page, there are two folders:

The “Offline Edited Documents” folder is the location for documents that are edited offline to be uploaded to.

The “Original Documents” folder contains the unedited, original documents for reference.



For the Second Pass page, there are also two folders:

The “Offline Edited Documents” serves the same function as it does for the First Pass. The folder is the location for documents that are edited offline to be uploaded to.

The “Original Documents with Merged Comments” folder contains the documents after comments from the First Pass were merged.





CPT ASSISTANT NEWSLETTER FOLDERS

# CPT Assistant Newsletter- First vs. Second Pass (2/2)

**Assistant Template First Pass**

Documents for Review

Name	Modified	Modified By	Status
Offline Edited Documents	October 14	Maddie Krueger	1st Pass
Original Documents	October 14	Maddie Krueger	Original
Appendix R- Digital MedicineServ...	November 10	Barbara Benstead	1st Pass
Breast Biopsy Guidelines - Coding...	November 15	Barbara Benstead	1st Pass
Transcatheter Leadless Pacemaker...	November 30	Maddie Krueger	1st Pass

The pills in the column labeled "Status" indicate the stage that document is in- "1st Pass", "Original", "2nd Pass", "Finalized Version"

**Assistant Template Second Pass**

Documents for Review

Name	Modified	Modified By	Status 1
Offline Edited Documents	October 19	Maddie Krueger	Finalized Version
Original Documents with Merged ...	October 19	Maddie Krueger	2nd Pass
Test Document 1 Final.docx	About a minute ago	Maddie Krueger	2nd Pass
Test Document 1.docx	About a minute ago	Maddie Krueger	2nd Pass
Test Document 2.docx	About a minute ago	Maddie Krueger	2nd Pass
Test Document 3.docx	About a minute ago	Maddie Krueger	2nd Pass

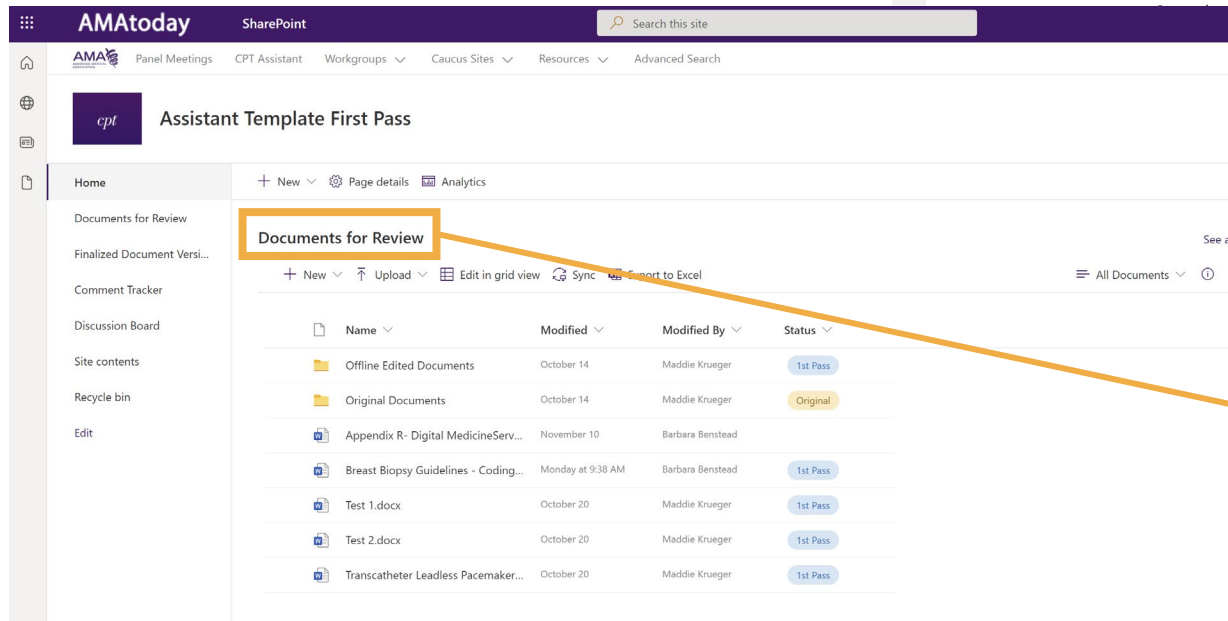
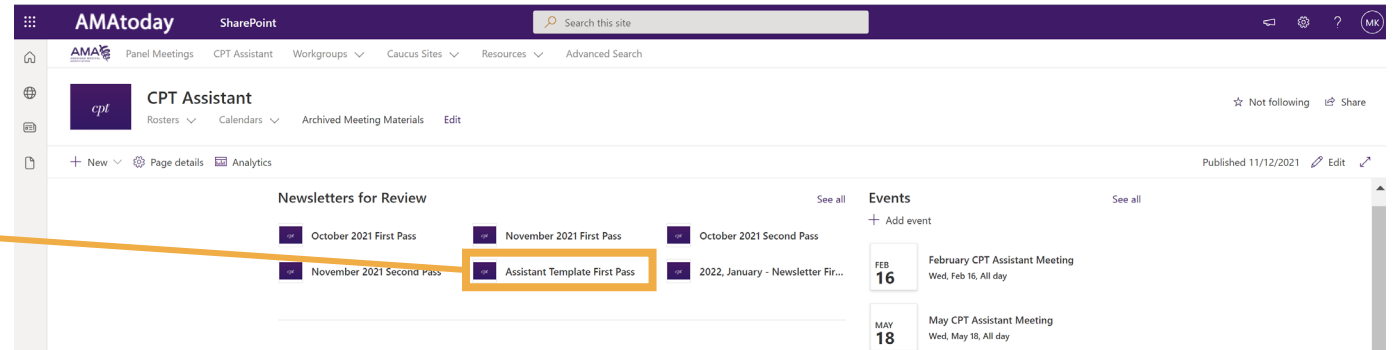
For both the First and Second Pass, the documents posted in the "Documents for Review" section are the documents to be commented on. Open these documents to add your comments online



CPT ASSISTANT NEWSLETTER FOLDERS

# CPT Assistant Newsletter- Commenting on a Document (1/2)

**Step #1:** Click on the desired newsletter from the “Newsletters for Review” section



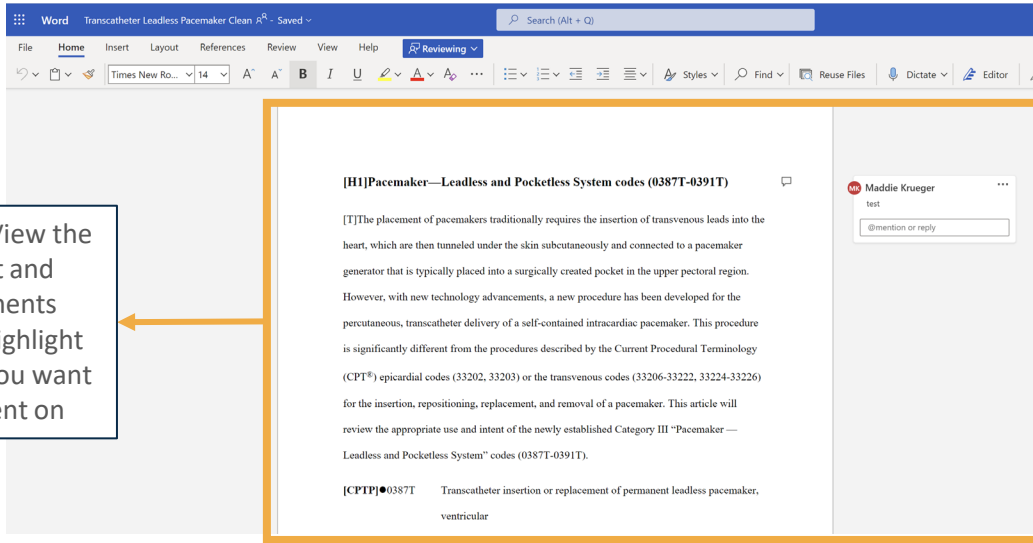
**Step #2:** View the “Documents for Review” section

To begin to comment on a document online, select the desired document from this section to open it



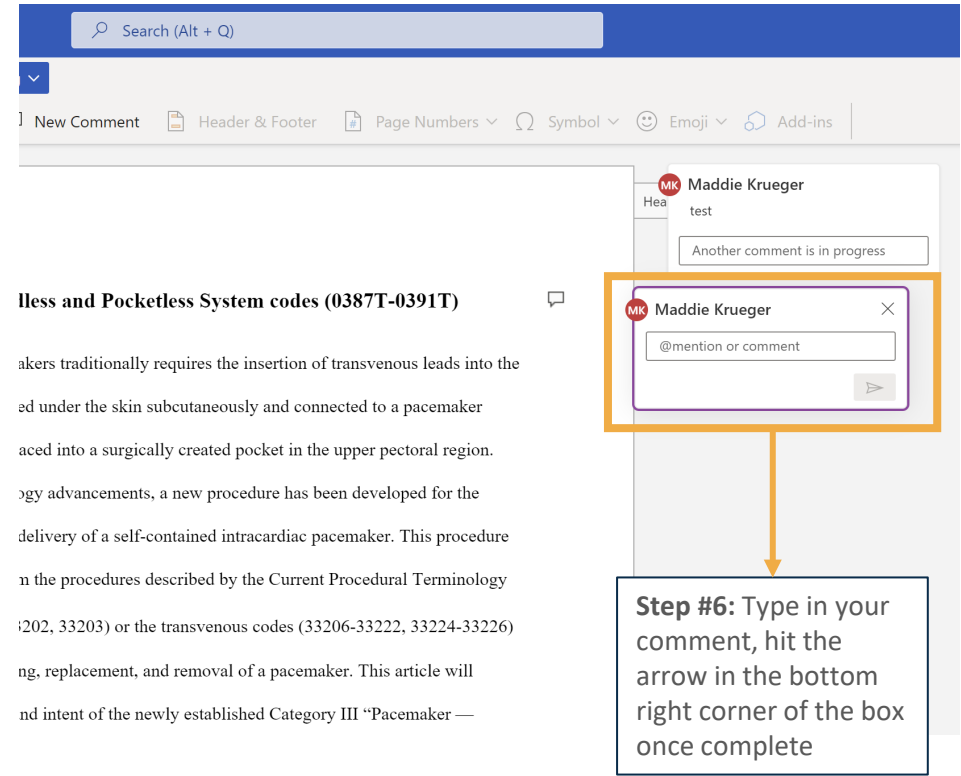
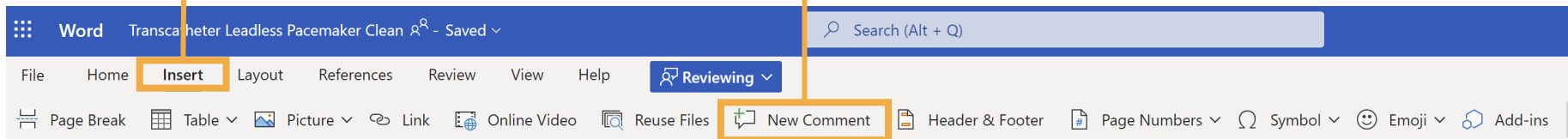
# CPT Assistant Newsletter- Commenting on a Doc (2/2)

**Step #3:** View the document and any comments posted. Highlight the text you want to comment on



**Step #4:** With the desired text highlighted, locate the Insert tab posted along the top of the page and click on it

**Step #5:** Select "New Comment"

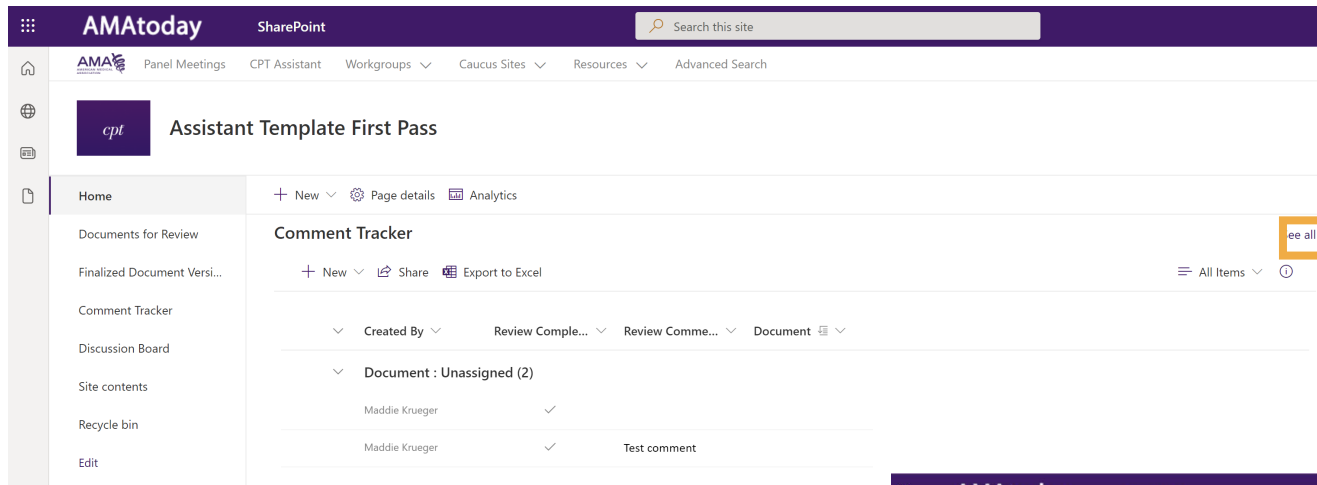


**Step #6:** Type in your comment, hit the arrow in the bottom right corner of the box once complete



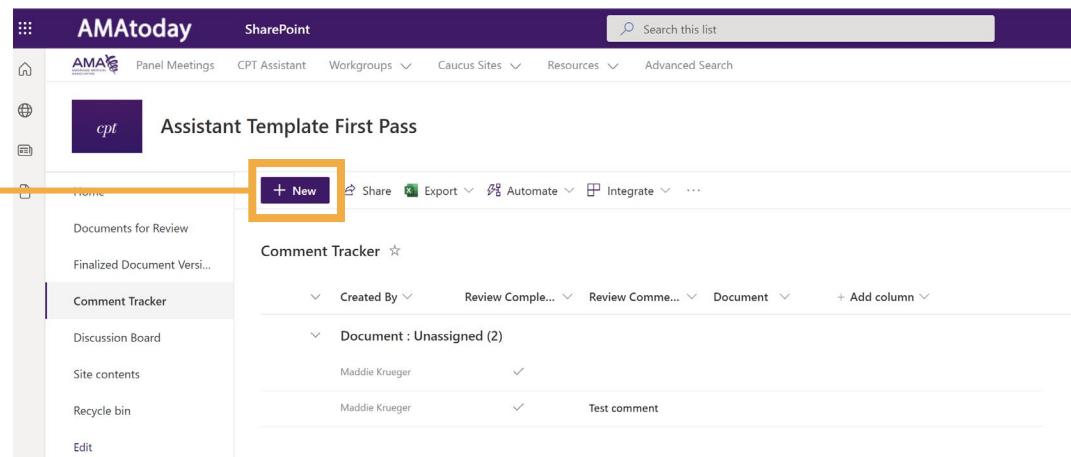
CPT ASSISTANT NEWSLETTER FOLDERS

# CPT Assistant Newsletter- Adding an Item to the Comment Tracker (1/2)



**Step #1:** Navigate to the Comment Tracker section on the desired specific newsletter page and select "See all"

**Step #2:** Click the "New" button to add a comment to the Comment Tracker



# CPT Assistant Newsletter- Adding an Item to the Comment Tracker (2/2)

The screenshot shows a 'New item' form with the following fields and controls:

- Content Type: A dropdown menu with 'Item' selected.
- Title: A text input field with the placeholder 'Enter value here'.
- Review Comments: A section with a header 'Review Comments' and a text area with the placeholder 'Enter any comments regarding your review status here.'
- Review Complete?: A checkbox labeled 'Yes' with the question 'Have you completed your review of this document?' below it.
- Attachments: A section with the header 'Attachments' and the text 'Add attachments'.
- Buttons: 'Save' and 'Cancel' buttons at the bottom.

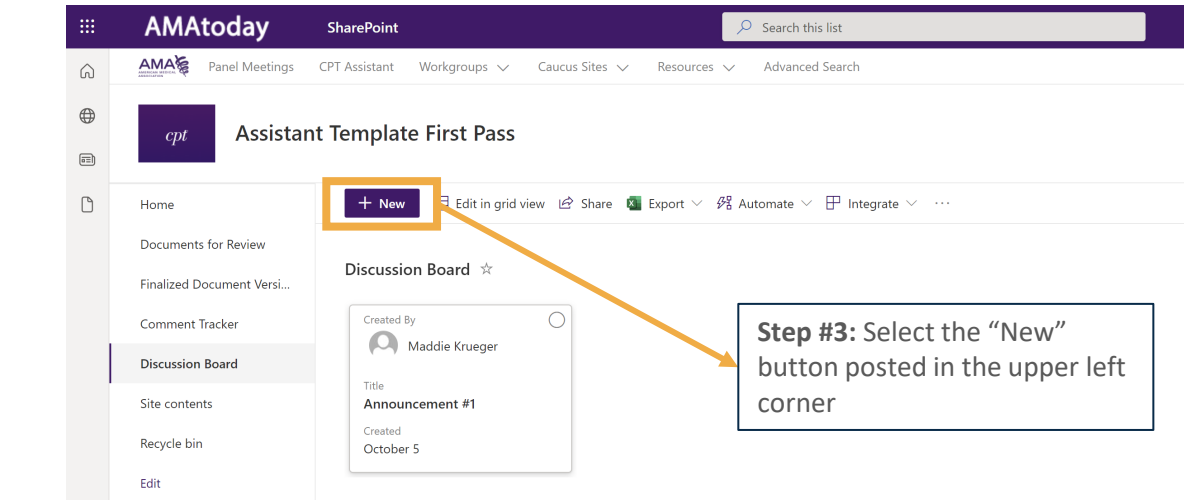
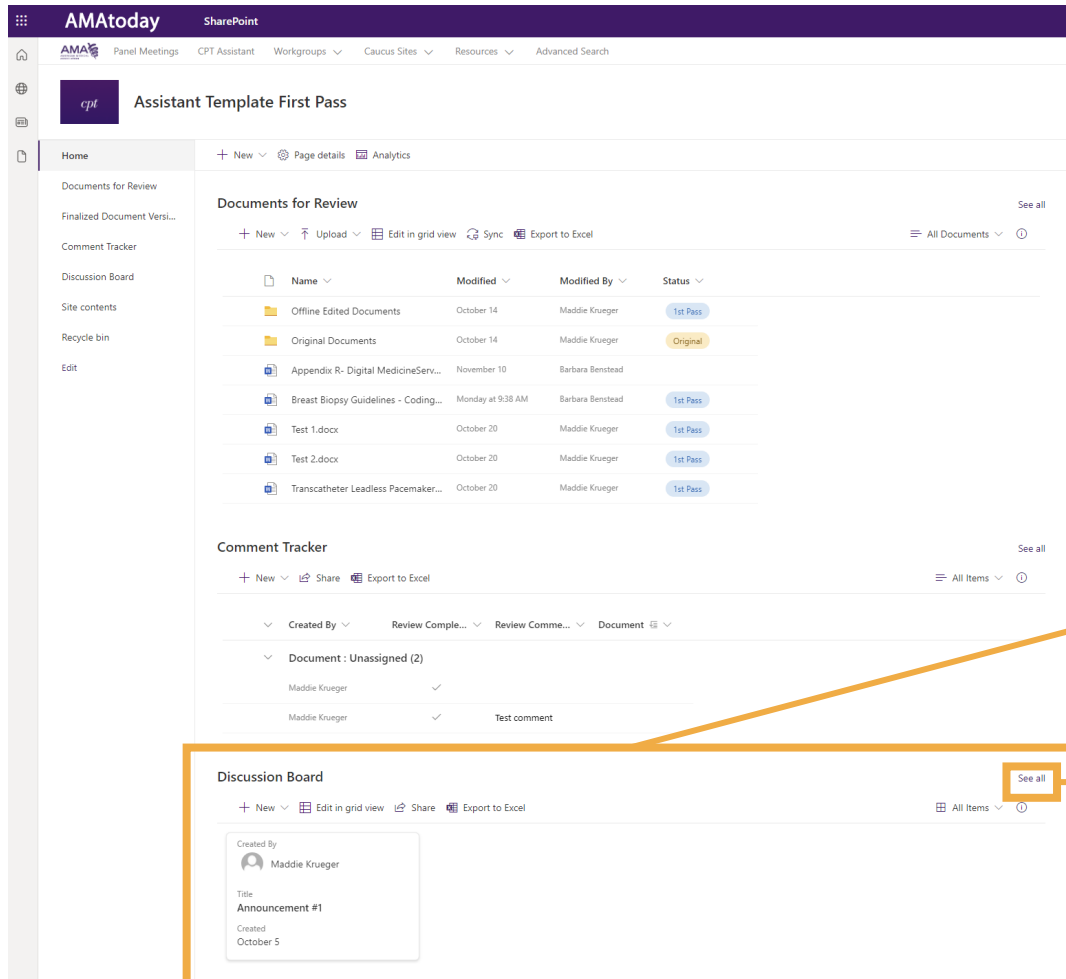
**Step #3:** Fill out the appropriate fields in the panel that appears on the right side of the screen

**Step #4:** Once the fields are filled out, select "Save" either at the top or bottom of the panel



CPT ASSISTANT NEWSLETTER FOLDERS

# CPT Assistant Newsletter- Contributing to the Discussion Board (1/2)



**Step #3:** Select the “New” button posted in the upper left corner

**Step #1:** From the CPT Assistant Newsletter page, scroll to the bottom of the page to the “Discussion Board” section

**Step #2:** Select “See all”



CPT ASSISTANT NEWSLETTER FOLDERS

# CPT Assistant Newsletter- Contributing to the Discussion Board (2/2)

The screenshot shows a web form titled "New item" with a toolbar at the top containing "Save", "Cancel", and "Copy link" buttons. The form has three main sections: "Title \*" with a text input field containing "Enter value here"; "Discussion Detail" with a larger text area containing "Enter value here"; and "Attachments" with a button labeled "Add attachments". At the bottom of the form are two buttons: "Save" and "Cancel".

**Step #4:** Fill out the appropriate fields in the panel that appears on the right side of the screen

**Step #5:** Once the fields are filled out, select "Save" either at the top or bottom of the panel



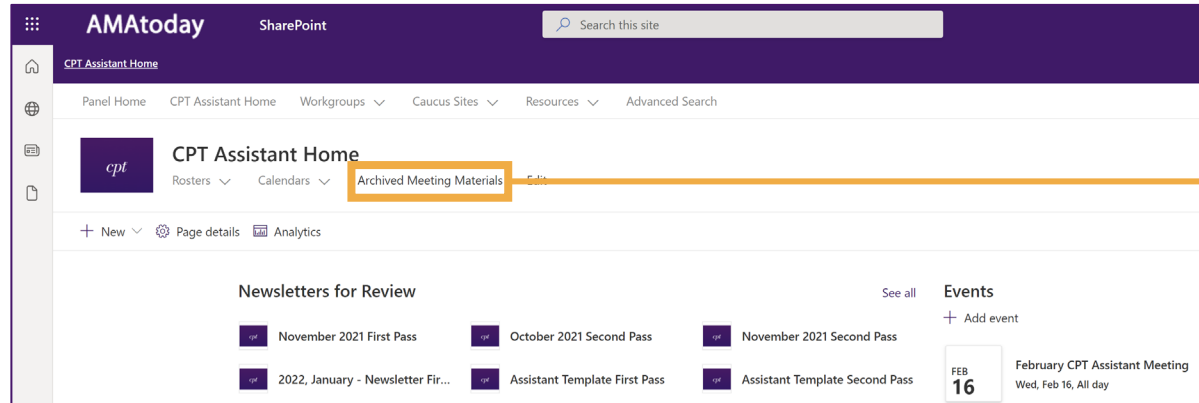
# ARCHIVED- ASSISTANT CPT ASSISTANT MEETINGS

[ARCHIVED ASSISTANT MEETING  
MATERIALS](#)

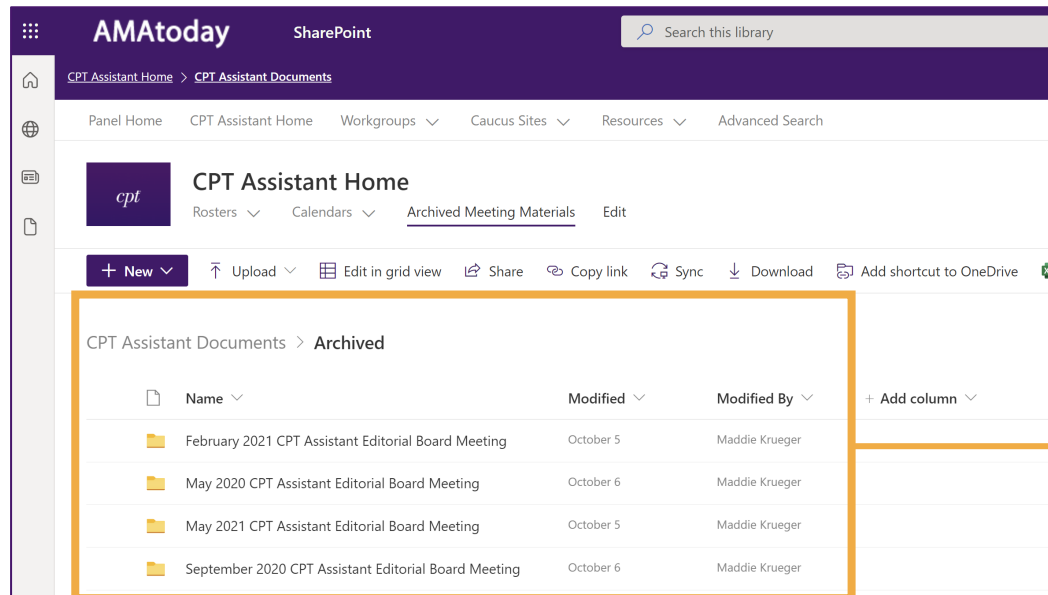




# Archived CPT Assistant Meeting Materials



**Step #1:** From the CPT Assistant Home, click on the “Archived Meeting Materials” link posted on the Site Navigation



**Step #2:** View the Archived CPT Assistant Meeting Materials, with the meetings listed in descending order. Open a folder to view its contents



[TABLE OF CONTENTS](#)

# WORKGROUPS & CAUCUSES

[ACCESS](#)

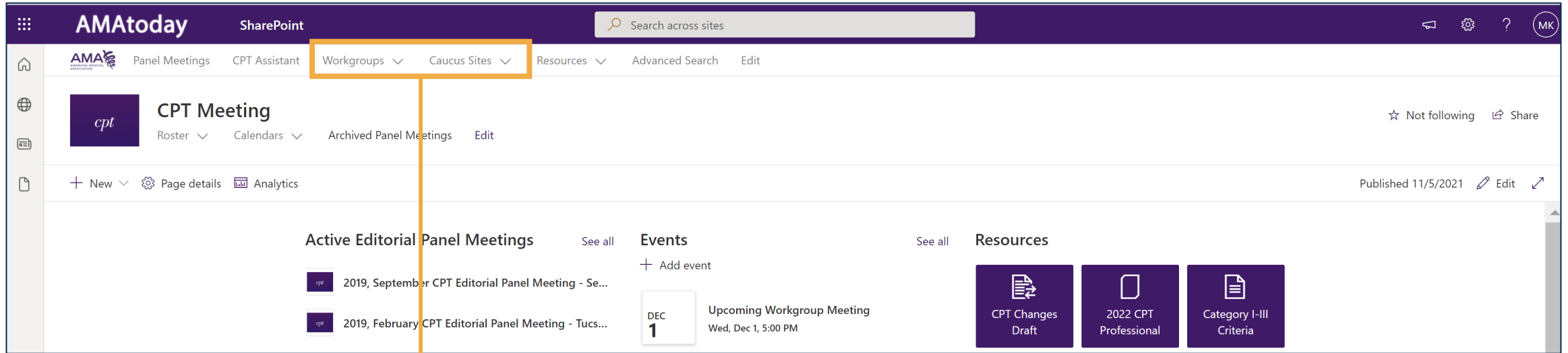
[WORKGROUP PAGES](#)

[CAUCUS SITES](#)

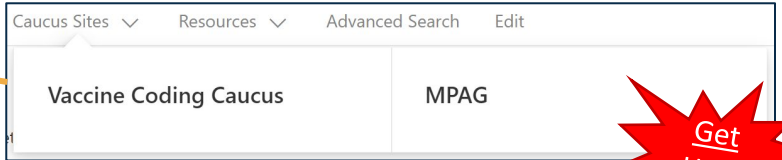
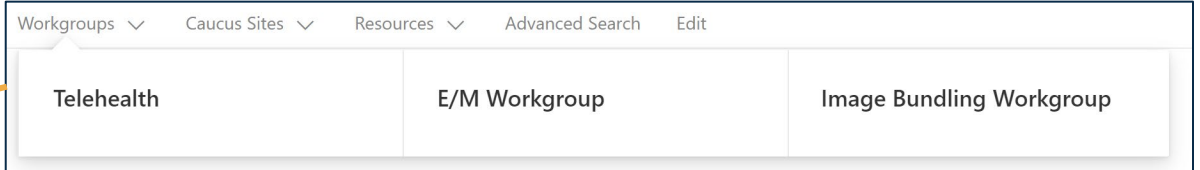


WORKGROUP AND CAUCUS

# Workgroup and Caucus Page Access



From the CPT Meeting homepage, navigate to the Hub Navigation links. Hover over the arrow next to "Workgroups" and "Caucus Sites". Select the page you have access to in order to view it



WORKGROUP AND CAUCUS

# Workgroup Pages

## Telehealth

The screenshot shows the 'Telehealth' workgroup page. On the left is a navigation pane with 'Home' selected. The main content area is titled 'Home' and contains two sections: 'TSW Workgroups' and 'Upcoming Events'. The 'TSW Workgroups' section is a document library with the following items:

Name	Modified	Modified By
0-Face-to-Face Meeting 4 (meetin...	September 27, 2016	Dehandro Hayden
0-May 13th 2016 - Face To Face ...	May 10, 2016	Martha Espronceda
1 - TSW	January 6, 2016	Steve Roussopoulos
2 - Review of Synchronous Data A...	January 6, 2016	Steve Roussopoulos
3 - Disruptive Technology Services	January 6, 2016	Steve Roussopoulos
4 - Expanded Asynchronous EM S...	January 6, 2016	Steve Roussopoulos

The 'Upcoming Events' section includes a 'Create an event' button and a list of events for 'Month 01':

Title of event	Tuesday 12:00 AM - 1:00 PM
Title of event	Tuesday 12:00 AM - 1:00 PM
Title of event	Tuesday 12:00 AM - 1:00 PM
Title of event	Tuesday 12:00 AM - 1:00 PM

Across all Workgroup pages, there is a document library where users can access materials

Across all Workgroup pages, there is an Upcoming Events section

## E/M Workgroup

The screenshot shows the 'E/M Workgroup' page. The main content area is titled 'E/M Workgroup' and contains a document library and an 'Upcoming Events' section. The document library has the following items:

Name	Modified	Modified By
CCP Reference Links		

The 'Upcoming Events' section includes a 'Create an event' button and a list of events for 'Month 01':

Title of event	Tuesday 12:00 AM - 1:00 PM
Title of event	Tuesday 12:00 AM - 1:00 PM
Title of event	Tuesday 12:00 AM - 1:00 PM
Title of event	Tuesday 12:00 AM - 1:00 PM

## Image Bundling Workgroup

The screenshot shows the 'Image Bundling Workgroup' page. The main content area is titled 'Image Bundling Workgroup' and contains a document library and an 'Upcoming Events' section. The document library has the following items:

Name	Modified	Modified By
Document Type : Conflict of Interest Form (1)		
Confidentiality Agreement 2019 u...	November 8	Michael Pellegrino
Document Type : Onsite Options (1)		
Text Document.docx	November 8	Michael Pellegrino
Document Type : Supporting Documentation (3)		

The 'Upcoming Events' section includes a 'Create an event' button and a list of events for 'Month 01':

Title of event	Tuesday 12:00 AM - 1:00 PM
Title of event	Tuesday 12:00 AM - 1:00 PM
Title of event	Tuesday 12:00 AM - 1:00 PM
Title of event	Tuesday 12:00 AM - 1:00 PM



WORKGROUP AND CAUCUS

# Caucus Sites

## Vaccine Coding Caucus

There is a CCA Reference Links section where users can access the Code Change Proposals they have access to

Across Caucus pages, there is an Upcoming Events section

## MPAG

## Pathology Coding Caucus



# ROSTERS

[ACCESS TO LISTS](#)

[COPY AND PASTE EMAIL  
ADDRESSES](#)

[EXPORT TO EXCEL/CSV](#)

[SORT ON COLUMNS](#)

[FILTER](#)



ROSTERS

# Rosters Access

## CPT Meeting Homepage

AMAtoday SharePoint Search across sites

Panel Meetings CPT Assistant Workgroups Caucus Sites Resources Advanced Search Edit

**CPT Meeting** Not following Share

Roster Calendars Archived Panel Meetings Edit

+ New Page details Analytics Published 11/5/2021 Edit

Active Editorial Panel Meetings See all Events See all Resources

2019, September CPT Editorial Panel Meeting - Se...  
2019, February CPT Editorial Panel Meeting - Tue...

+ Add event  
DEC Upcoming Workgroup Meeting

CPT Changes 2022 CPT Category I-III

## CPT Assistant Homepage

AMAtoday SharePoint Search this site

Panel Meetings CPT Assistant Workgroups Caucus Sites Resources Advanced Search

**CPT Assistant**

Rosters Calendars Archived Meeting Materials Edit

From the CPT Meeting homepage or CPT Assistant homepage, navigate to the site navigation links. Hover over the arrow next to Rosters and select the roster(s) you have access to view



**ROSTERS**

# Selecting an Email Address- Copy and Paste Method

CPT Roster ☆

Full Name	Last Name	Email Address	Specialty Society	Position	Phone Number	Mailing Address 1	Mailing Address...	City
Aleodor A. Andea, MD, MBA	Andea	<a href="mailto:andaaa@med.umich.edu">andaaa@med.umich.edu</a>	American Society of Dermatopathology	Alternate Advisor	734-764-8684	1301 Catherine St.		
Kris Anderson, DC, MS	Anderson	<a href="mailto:krisandersondc@gmail.com">krisandersondc@gmail.com</a>	American Chiropractic Association	Alternate Advisor	(563) 449-2702	4350 S. Washington St.	Suite 100	Grand Forks
Thilani Attale	Attale	<a href="mailto:Thilani.Attale@ama-assn.org">Thilani.Attale@ama-assn.org</a>	American Medical Association	AMA Staff	312-464-5072	330 N. Wabash Ave.		Chicago
Keith Thomas Ayoob EdD, RD, FADA, CSP	Ayoob	<a href="mailto:ktayoob@msn.com">ktayoob@msn.com</a>	Academy of Nutrition and Dietetics					
James M. Bailey, DO, PhD	Bailey	<a href="mailto:markbailey@uabmc.edu">markbailey@uabmc.edu</a>	American Osteopathic Association					
Michael Barry	Barry	<a href="mailto:mbarry@acpm.org">mbarry@acpm.org</a>	American College of Preventive Medicine					
Scott C. Bartley, MD	Bartley	<a href="mailto:ama@juliescott.org">ama@juliescott.org</a>	Society of Nuclear Medicine and Molecular Imaging					
Alice Bell	Bell	<a href="mailto:alicebell@apta.org">alicebell@apta.org</a>	American Physical Therapy Association					

**Step #1:** Navigate to the desired email address to be selected. Right click on the email address

**Step #2:** From the menu that appears after right clicking on the address, select "Copy field to clipboard"

**Step #3:** The address is now copied to your clipboard. Navigate to the location where the address is to be pasted. Paste the address

CPT Roster ☆

Full Name	Last Name	Email Address	Position	Phone Number	Mailing Address 1
Aleodor A. Andea, MD, MBA	Andea	<a href="mailto:andaaa@med.umich.edu">andaaa@med.umich.edu</a>	Alternate Advisor	734-764-8684	1301 Catherine St.
Kris Anderson, DC, MS	Anderson	<a href="mailto:krisandersondc@gmail.com">krisandersondc@gmail.com</a>	Alternate Advisor	(563) 449-2702	4350 S. Washington St.
Thilani Attale	Attale	<a href="mailto:Thilani.Attale@ama-assn.org">Thilani.Attale@ama-assn.org</a>	AMA Staff	312-464-5072	330 N. Wabash Ave.
Keith Thomas Ayoob EdD, RD, FADA, CSP	Ayoob	<a href="mailto:ktayoob@msn.com">ktayoob@msn.com</a>	Advisor	(212) 960-3453	212 E. 47th St.
James M. Bailey, DO, PhD	Bailey	<a href="mailto:markbailey@uabmc.edu">markbailey@uabmc.edu</a>	Advisor	205-930-8300	1201 11th Avenue South
Michael Barry	Barry	<a href="mailto:mbarry@acpm.org">mbarry@acpm.org</a>	Advisor Staff	202-466-2044	1307 New York Avenue, NW
Scott C. Bartley, MD	Bartley	<a href="mailto:ama@juliescott.org">ama@juliescott.org</a>	Advisor	(952) 856-4187	481 Amberg Lane
Alice Bell	Bell	<a href="mailto:alicebell@apta.org">alicebell@apta.org</a>	Advisor Staff	703-706-3180	1111 North Fair Street





ROSTERS

# Selecting an Email Address- Mailto Link Method

CPT Roster ☆

Full Name	Last Name	Email Address	Specialty Society	Position	Phone Number	Mailing Address 1	Mailing Address...	City
Aleodor A. Andea, MD, MBA	Andea	<a href="mailto:andaaa@med.umich.edu">andaaa@med.umich.edu</a>	American Society of Dermatopathology	Alternate Advisor	734-764-8684	1301 Catherine St		
Kris Anderson, DC, MS	Anderson	<a href="mailto:krisandersondc@gmail.com">krisandersondc@gmail.com</a>	American Chiropractic Association	Alternate Advisor	(563) 449-2702	4350 S. Washington St.	Suite 100	
Thilani Attale	Attale	<a href="mailto:Thilani.Attale@ama-assn.org">Thilani.Attale@ama-assn.org</a>	American Medical Association	AMA Staff	312-464-5072	330 N. Wabash Ave.		
Keith Thomas Ayoob EdD, RD, FADA, CSP	Ayoob	<a href="mailto:ktayoob@msn.com">ktayoob@msn.com</a>	Academy of Nutrition and Dietetics	Advisor	(212) 960-3453	212 E. 47th St.	Apt 18F	New York
James M. Bailey, DO, PhD	Bailey	<a href="mailto:markbailey@uabmc.edu">markbailey@uabmc.edu</a>	American Osteopathic Association	Advisor	205-930-8300	1201 11th Avenue South	Suite 400	Birmingham
Michael Barry	Barry							
Scott C. Bartley, MD	Bartley							
Alice Bell	Bell							

**Step #1:** Navigate to the desired email address to be selected

**Step #2:** Click directly on the email address. This will result in populating a new email with the address selected in the "To" line

The screenshot shows an email client window titled "Untitled - Message (HTML)". The menu bar includes File, Message, Insert, Options, Format Text, Review, Help, Acrobat, and Tell me what you want to do. The toolbar contains icons for undo, redo, insert, font face (Calibri (Body)), font size (11), bold, italic, underline, highlight, text color, background color, bulleted list, numbered list, link, and unlink. The "To" field is populated with the email address "andaaa@med.umich.edu".



ROSTERS

# Export a List



CPT Collaboration Home

Rosters | Calendars | Archived Panel Meetings | Edit

+ New | Edit in grid view | Share | **Export** | Automate | Integrate | ...

**Step #1:** Navigate to the desired roster to be exported and navigate to the tool bar posted above the list. Hover over the arrow next to "Export" and select either "Export to Excel" or "Export to CSV file"

CPT Roster ☆

Full Name	Last Name	Email Address	Specialty Society	Position	Phone Number	Mailing Address 1	Mailing Address...	City
Michelle Abraham, MHA	Abraham	<a href="mailto:abraham@aaos.org">abraham@aaos.org</a>	American Academy of Orthopaedic Surgeons	Advisor Staff	847-384-4015	9400 West River Road		Rosemont
Sarah M. Abshier, DPM	Abshier	<a href="mailto:sarah.abshier@gmail.com">sarah.abshier@gmail.com</a>	American Podiatric Medical Association	Alternate Advisor	(215) 531-4160	510 Stream Isle Dr.		
Murad Alam, MD	Alam	<a href="mailto:m-alam@northwestern.edu">m-alam@northwestern.edu</a>	American Society of Dermatologic Surgery	Advisor	312-693-1190	Northwestern University	676 North Saint Clair Street, Suite 1600	Chicago

**Step #2:** Open the downloaded Excel or CSV file to view the list

**Excel**

Full Name	Last Name	Email Address	Specialty Society	Position
Michelle Abraham, MHA	Abraham	abraham@aaos.org	American Academy of Orthopaedic Surgeons	Advisor Staff
Sarah M. Abshier, DPM	Abshier	sarah.abshier@gmail.com	American Podiatric Medical Association	Alternate Advisor
Murad Alam, MD	Alam	m-alam@northwestern.edu	American Society of Dermatologic Surgery	Advisor
Mark D. Alson, MD, FACR, RCC	Alson	alsonm@aol.com	American College of Radiology	Advisor
Chester A. Amedia, Jr., MD, FACP	Amedia	camedia@xcdms.com	Renal Physicians Association	Advisor
Kayla Amodeo	Amodeo	kamodeo@aao.org	American Academy of Ophthalmology	Advisor Staff
Aleodor A. Andea, MD, MBA	Andea	andea@med.umich.edu	American Society of Dermatopathology	Alternate Advisor
Kris Anderson, DC, MS	Anderson	krisandersondc@gmail.com	American Chiropractic Association	Alternate Advisor
Thilani Attale	Attale	Thilani.Attale@ama-assn.org	American Medical Association	AMA Staff
Keith Thomas Ayoob EdD, RD, FADA, CSP	Ayoob	ktayoob@msn.com	Academy of Nutrition and Dietetics	Advisor
James M. Bailey, DO, PhD	Bailey	markbailey@uabmc.edu	American Osteopathic Association	Advisor
Michael Barry	Barry	mbarry@acpm.org	American College of Preventive Medicine	Advisor Staff
Scott C. Bartley, MD	Bartley	ama@juliescott.org	Society of Nuclear Medicine and Molecular Imaging	Advisor
Alice Bell	Bell	alicebell@apta.org	American Physical Therapy Association	Advisor Staff

**CSV File**

Full Name	Last Name	Email Address	Specialty Society	Position
Michelle Abraham, MHA	Abraham	abraham@aaos.org	American Academy of Orthopaedic Surgeons	Advisor Staff
Sarah M. Abshier, DPM	Abshier	sarah.abshier@gmail.com	American Podiatric Medical Association	Alternate Advisor
Murad Alam, MD	Alam	m-alam@northwestern.edu	American Society of Dermatologic Surgery	Advisor
Mark D. Alson, MD, FACR, RCC	Alson	alsonm@aol.com	American College of Radiology	Advisor
Chester A. Amedia, Jr., MD, FACP	Amedia	camedia@xcdms.com	Renal Physicians Association	Advisor
Kayla Amodeo	Amodeo	kamodeo@aao.org	American Academy of Ophthalmology	Advisor Staff
Aleodor A. Andea, MD, MBA	Andea	andea@med.umich.edu	American Society of Dermatopathology	Alternate Advisor
Kris Anderson, DC, MS	Anderson	krisandersondc@gmail.com	American Chiropractic Association	Alternate Advisor
Thilani Attale	Attale	Thilani.Attale@ama-assn.org	American Medical Association	AMA Staff
Keith Thomas Ayoob EdD, RD, FADA, CSP	Ayoob	ktayoob@msn.com	Academy of Nutrition and Dietetics	Advisor
James M. Bailey, DO, PhD	Bailey	markbailey@uabmc.edu	American Osteopathic Association	Advisor
Michael Barry	Barry	mbarry@acpm.org	American College of Preventive Medicine	Advisor
Scott C. Bartley, MD	Bartley	ama@juliescott.org	Society of Nuclear Medicine and Molecular Imaging	Advisor
Alice Bell	Bell	alicebell@apta.org	American Physical Therapy Association	Advisor Staff

Get Help

**ROSTERS**

# Sort a List

**CPT Collaboration Home**  
Rosters | Calendars | Archived Panel Meetings | Edit

+ New | Edit in grid view | Share | Export | Automate | Integrate | ...

CPT Roster ☆

Full Name	Last Name	Email Address	Specialty Society	Position	Phone Number	Mailing Address 1	Mailing Address...	City
Michelle Abraham, MHA	Abraham	<a href="mailto:mabraham@aaos.org">mabraham@aaos.org</a>	American Academy of Orthopaedic Surgeons	Advisor Staff	847-384-4015	9400 West River Road		Rosemont
Sarah M. Abshier, DPM	Abshier	<a href="mailto:sarah.abshier@gmail.com">sarah.abshier@gmail.com</a>	American Podiatric Medical Association	Alternate Advisor	(215) 531-4160	510 Stream Isle Dr.		Powell
Murad Alam, MD	Alam	<a href="mailto:m-alam@northwestern.edu">m-alam@northwestern.edu</a>	American Society of Dermatologic Surgery	Advisor	312-695-1190	Northwestern University	676 North Saint Clair Street, Suite 1600	Chicago
Mark D. Alson, MD, FACR, RCC	Alson	<a href="mailto:alsonm@aol.com">alsonm@aol.com</a>	American College of Radiology	Advisor	559-297-0300	6641 N Forkner Ave		Fresno
Chester A. Amedia, Jr., MD, FACP	Amedia	<a href="mailto:camedia@xcdms.com">camedia@xcdms.com</a>	Renal Physicians Association	Advisor	330-781-6212	4822 Market Street	Suite 300	Boardman

**Step #1:** Navigate to the desired roster. Once viewing the roster, locate the desired column to be sorted on

State/Province | Postal

A to Z

Z to A

Filter by

Group by State/Province

Column settings >

Totals >

**Step #2:** Click on the arrow next to the column name, and select the desired sorting order

CPT Roster ☆

Full Name	Last Name	Email Address	Specialty Society	Position ↑	Phone Number	Mailing Address 1	Mailing Address...	City
Murad Alam, MD	Alam	<a href="mailto:m-alam@northwestern.edu">m-alam@northwestern.edu</a>	American Society of Dermatologic Surgery	Advisor	312-695-1190	Northwestern University	676 North Saint Clair Street, Suite 1600	Chicago
Mark D. Alson, MD, FACR, RCC	Alson	<a href="mailto:alsonm@aol.com">alsonm@aol.com</a>	American College of Radiology	Advisor	559-297-0300	6641 N Forkner Ave		Fresno
Chester A. Amedia, Jr., MD, FACP	Amedia	<a href="mailto:camedia@xcdms.com">camedia@xcdms.com</a>	Renal Physicians Association	Advisor	330-781-6212	4822 Market Street	Suite 300	Boardman
Keith Thomas Ayoob EdD, RD, FADA, CSP	Ayoob	<a href="mailto:ktayoob@msn.com">ktayoob@msn.com</a>	Academy of Nutrition and Dietetics	Advisor	(212) 960-3453	212 E. 47th St.	Apt 18F	New York
James M. Bailey, DO, PhD	Bailey	<a href="mailto:markbailey@uabmc.edu">markbailey@uabmc.edu</a>	American Osteopathic Association	Advisor	205-930-8300	1201 11th Avenue South	Suite 400	Birmingham
Scott C. Bartley, MD	Bartley	<a href="mailto:ama@julescott.org">ama@julescott.org</a>	Society of Nuclear Medicine and Molecular Imaging	Advisor	(952) 856-4187	481 Amberg Lane		

**Step #3:** View the results of sorting on a column



**ROSTERS**

# Apply a Filter to a List (1/2)

**CPT Collaboration Home**  
Rosters | Calendars | Archived Panel Meetings | Edit

+ New | Edit in grid view | Share | Export | Automate | Integrate | ...

**CPT Roster** ☆

Full Name	Last Name	Email Address	Specialty Society	Position	Phone Number	Mailing Address 1	Mailing Address...	City
Michelle Abraham, MHA	Abraham	<a href="mailto:abraham@aaos.org">abraham@aaos.org</a>	American Academy of Orthopaedic Surgeons	Advisor Staff	847-384-4015	9400 West River Road		Rosemont
Sarah M. Abshier, DPM	Abshier	<a href="mailto:sarah.abshier@gmail.com">sarah.abshier@gmail.com</a>	American Podiatric Medical Association	Alternate Advisor	(215) 531-4160	510 Stream Isle Dr.		Powell
Murad Alam, MD	Alam	<a href="mailto:m-alam@northwestern.edu">m-alam@northwestern.edu</a>	American Society of Dermatologic Surgery	Advisor	312-695-1190	Northwestern University	676 North Saint Clair Street, Suite 1600	Chicago
Mark D. Alison, MD, FACR, RCC	Alison	<a href="mailto:alisonm@sol.com">alisonm@sol.com</a>	American College of Radiology	Advisor	559-297-0300	6641 N Forkner Ave		Fresno
Chester A. Amedia, Jr., MD, FACP	Amedia	<a href="mailto:camedia@xcdms.com">camedia@xcdms.com</a>	Renal Physicians Association	Advisor	330-781-6212	4822 Market Street	Suite 300	Boardman

**Step #1:** Navigate to the desired roster. Once viewing the roster, locate the desired column to apply a filter to

State/Province | Postal

- A to Z
- Z to A
- Filter by**
- Group by State/Province
- Column settings >
- Totals >

**Step #2:** Click on the arrow next to the column name, and select "Filter by"



ROSTERS

# Apply a Filter to a List (2/2)

Filter by 'Position' (1) ×

Type text to find a filter

**Step #3:** In the panel that appears on the right side of the screen, check the values that you want to view

(Empty)

**Advisor**

Advisor Staff

Alternate Advisor

AMA Staff

MPAG

MPCW

PCC

VCC

**Step #4:** Once all desired values are selected, select "Apply"

**Apply**

Clear all

**(Optional) Step #7:** To clear a filter, select "Clear all"

**Step #6:** The filter you've applied is noted in the header bar

**Step #5:** View the results of applying a filter

CPT Roster ☆ > **Advisor**

Full Name	Last Name	Email Address	Specialty Society	Position	Phone Number	Mailing Address 1	Mailing Address...	City
Murad Alam, MD	Alam	<a href="mailto:m-alam@northwestern.edu">m-alam@northwestern.edu</a>	American Society of Dermatologic Surgery	Advisor	312-695-1190	Northwestern University	676 North Saint Clair Street, Suite 1600	Chicago
Mark D. Alson, MD, FACR, RCC	Alson	<a href="mailto:alsonm@aol.com">alsonm@aol.com</a>	American College of Radiology	Advisor	559-297-0300	6641 N Forkner Ave		Fresno
Chester A. Amedia, Jr., MD, FACP	Amedia	<a href="mailto:camedia@xcdms.com">camedia@xcdms.com</a>	Renal Physicians Association	Advisor	330-781-6212	4822 Market Street	Suite 300	Boardman
Keith Thomas Ayoob EdD, RD, FADA, CSP	Ayoob	<a href="mailto:ktayoob@msn.com">ktayoob@msn.com</a>	Academy of Nutrition and Dietetics	Advisor	(212) 960-3453	212 E. 47th St.	Apt 18F	New York
James M. Bailey, DO, PhD	Bailey	<a href="mailto:markbailey@uabmc.edu">markbailey@uabmc.edu</a>	American Osteopathic Association	Advisor	205-930-8300	1201 11th Avenue South	Suite 400	Birmingham
Scott C. Bartley, MD	Bartley	<a href="mailto:ama@julescott.org">ama@julescott.org</a>	Society of Nuclear Medicine and Molecular Imaging	Advisor	(952) 856-4187	481 Amberg Lane		Chaska
William C. Biggs, MD, FACE, ECNU	Biggs	<a href="mailto:william@amarilloemed.com">william@amarilloemed.com</a>	American Association of Clinical Endocrinologists	Advisor	806-358-8331	1215 S Couiter Street	Suite 400	Amarillo



[TABLE OF CONTENTS](#)

# CALENDARS

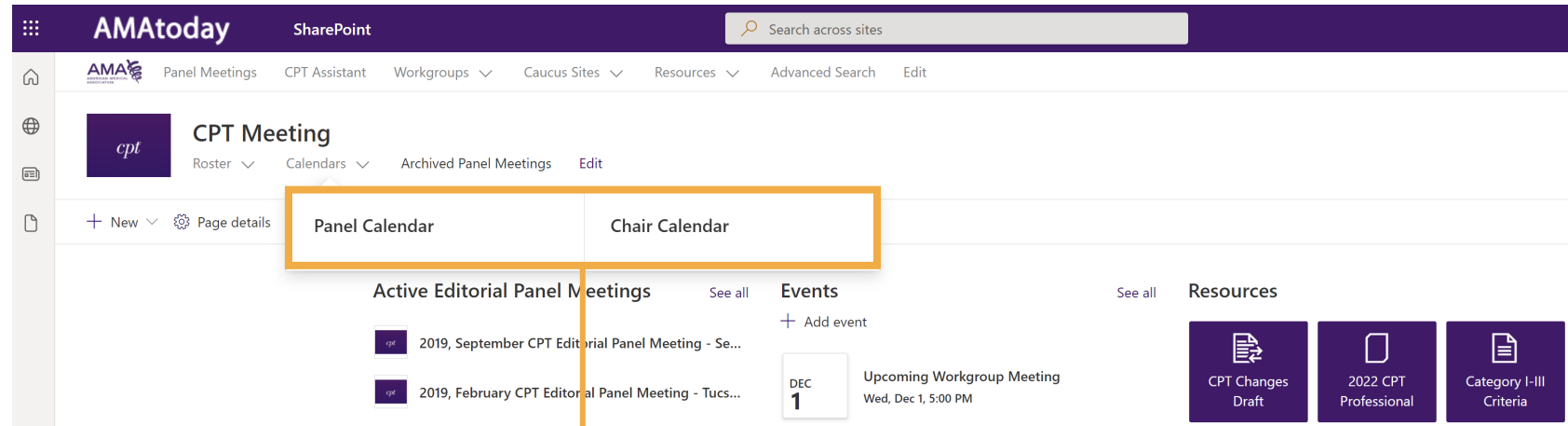
[ACCESS TO CALENDARS](#)

[PANEL CALENDAR](#)



CALENDARS

# Calendar Access



The Panel and Chair Calendar are accessible (if the user has permission) via the Site Navigation. Hover over the arrow next to “Calendars” and select either calendar to view



CALENDARS

# Panel Calendar

AMAtoday SharePoint Search across sites

Panel Meetings CPT Assistant Workgroups Caucus Sites Resources Advanced Search Edit

**CPT Meeting** Not following Share

Roster Calendars Archived Panel Meetings Edit

New Send to Promote Page details Analytics Published 10/20/2021 Edit

### Panel Calendar

Cole Mitchell Consultant

#### Calendar of Important Dates and Deadlines

+ Add event See all

<b>DEC 6-7</b> Feb 2022 Panel Meeting Mon, Dec 6, All day	<b>JAN 6</b> Feb 2022 Panel Meeting Thu, Jan 6, All day	<b>FEB 6-8</b> Feb 2022 Panel Meeting Sun, Feb 6, All day San Francisco, California, United States	<b>FEB 12</b> Meeting May 2022 Panel Meeting Sat, Feb 12, All day
---	---	---	--

The Panel Calendar uses Event Cards to show upcoming events, in order of event occurrence

Click on an individual event card to view additional details about the event

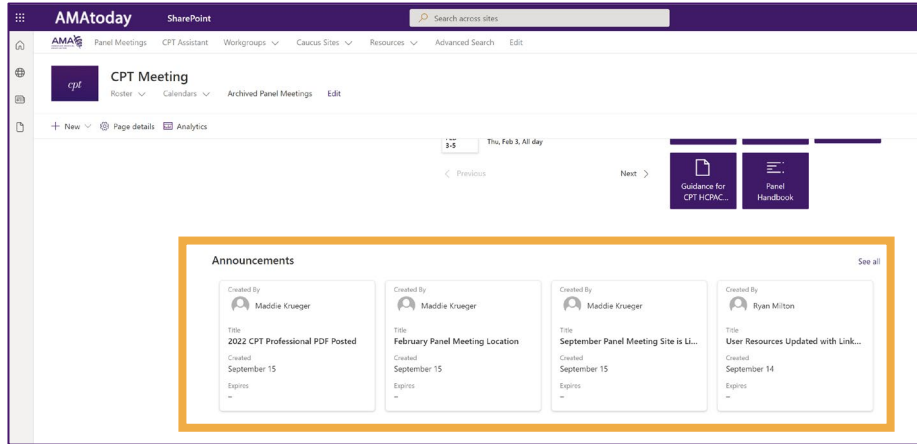
Can also select "See all" to view all upcoming event cards



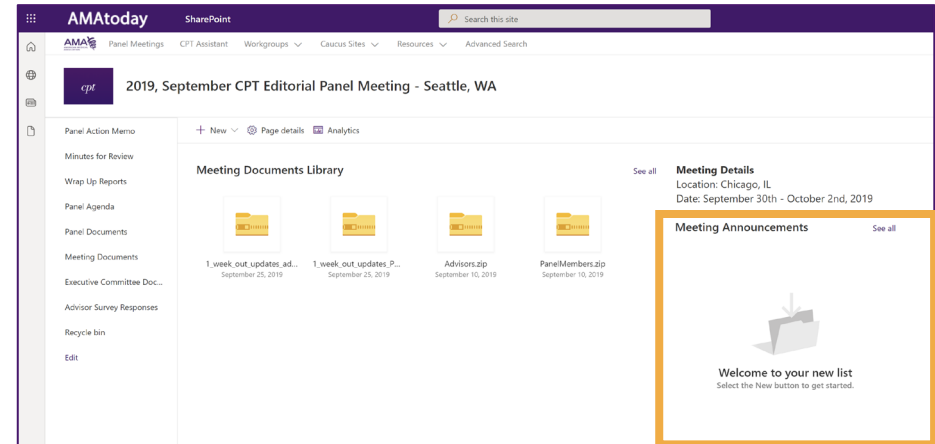


# Announcements Access

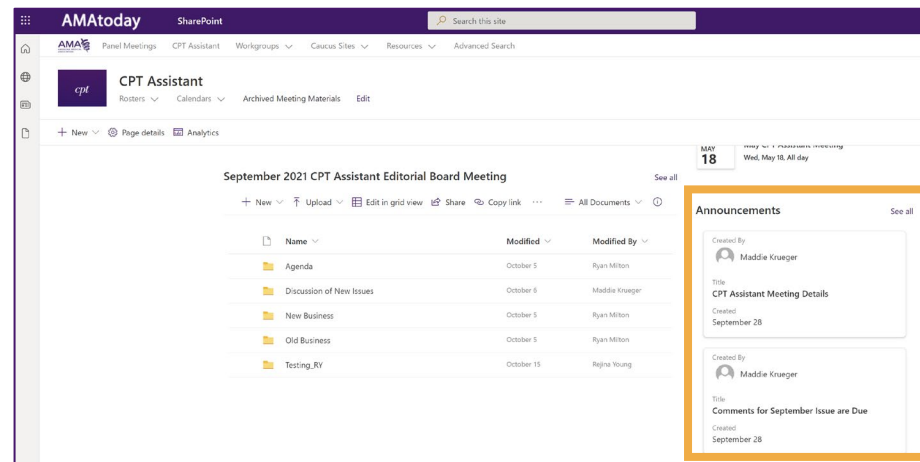
## CPT Meeting Homepage



## Panel Meeting Page



## CPT Assistant Homepage



Announcements are posted in three locations on the CPT Collaboration site:

1. CPT Meeting Homepage
2. CPT Assistant Homepage
3. Panel Meeting Page (Meeting Announcements)



[TABLE OF CONTENTS](#)

# ALERTS

[ALERT SETUP](#)

[CPT ASSISTANT NEWSLETTER  
FOLDER ALERTS](#)

[CPT ASSISTANT BOARD FOLDER  
ALERTS](#)



# Setting Up Alerts—Panel Business

Navigate to the Panel Agenda in the Left Nav and From the ellipsis at the end of the folder header bar, click on the “Alert me” option.

The screenshot shows the CPT Collaboration Home interface. The breadcrumb trail is: CPT Collaboration Home > 2022, February CPT Editorial Panel Meeting > Code Changes Documentation Library. The navigation bar includes: Panel Home, CPT Assistant Home, Workgroups, Caucus Sites, Resources, and Advanced Search. The main header shows the 'cpt' logo and '2022, February CPT Editorial Panel Meeting'. The left navigation pane lists: Panel Documents, Meeting Documents, Executive Committee Doc..., Panel Agenda (highlighted), Surveys, Recycle bin, and Edit. The main content area shows a folder view for 'Code Changes Documentation Library > Tab 6- Delivery Room 99464, 99465 Parenthetical Revisions'. The folder header bar includes: + New, Upload, Share, Copy link, Sync, Download, Add shortcut to OneDrive, Export to Excel, and an ellipsis menu. The ellipsis menu is open, showing options: Automate, Integrate, Alert me (highlighted), and Manage my alerts. Below the folder header is a table with columns: Name, Modified, Modified By, and Docun. The table contains two rows of documents.

Name	Modified	Modified By	Docun
Document Type : 1 - Panel Agenda Item (2)			
0-CCA-Delivery Room 99464, 99465 Parenthetical Revisions.docx	December 2, 2021	Michael Pellegrino	1 - Panel Agenda Item
PAV2-Delivery Room 99464, 99465 Parenthetical Revisions.docx	January 7	Michael Pellegrino	1 - Panel Agenda Item

- Alerts can be created that email you if there is activity in a folder
- Alerts can be managed from the ellipsis at the end of a folder information bar



# Setting Up Alerts—CPT Assistant Newsletter Articles

CPT Assistant Home Resources ▾

**cpt** 2022, March - Newsletter Second Pass

Home + New ▾ Upload ▾ Edit in grid view Sync Export to Excel Automate ▾ Integrate ▾ ...

Documents for Review

Finalized Document Vers...  
Comment Tracker  
Discussion Board  
CPT Assistant Online  
2022 CPT Professional  
RUC Database  
Site contents  
Recycle bin

### Documents for Review

Name ▾	Modified ▾	Modified By ▾	Status 1 ▾	+ Add column ▾
Offline Edited Documents	January 26	Michael Pellegrino		
Original Documents with Merged Comme...	January 26	Michael Pellegrino		

Alert me  
Manage my alerts

Click on the ellipsis to get alert menu

Select the folder in the Left-Nav



# CPT Assistant Board Meeting Alerts

CPT Assistant Home

CPT Assistant Home Resources

**CPT Assistant Home**  
Rosters Archived Meeting Materials

+ New Page details Analytics

Select the See All button

CPT Assistant Home > CPT Assistant Documents

CPT Assistant Home Resources

**CPT Assistant Home**  
Rosters Archived Meeting Materials

+ New Upload Edit in grid view Sync Export to Excel Automate Integrate

**CPT Assistant Documents**

Name	Modified	Modified By	+ Add column
Archived	October 5, 2021	Ryan Milton	
<b>Current</b>	January 27	Ted Nubel	

Select the Current folder

Newsletters for Review

2022, march - Newsletter Seco... MN 2022, March - Newsletter First...

2022, February CPT Assistant ... FC 2022, February CPT Assistant ...

February 2022 CPT Assistant Editorial Board Meeting

+ New Upload Edit in grid view Share Copy link All Documents

Name	Modified	Modified By
Agenda	January 26	Ted Nubel
Agenda Items	December 15, 2021	Ted Nubel
New Business	January 27	Ted Nubel
Old Business	January 27	Ted Nubel

See all



# Setting Up Alerts—menu options

## Alert me when items change

### Alert Title

Enter the title for this alert. This is included in the subject of the notification sent for this alert.

Code Changes Documentation Library: Tab

### Send Alerts To

You can enter user names or e-mail addresses. Separate them with semicolons.

### Users:

Barbara Benstead x

### Delivery Method

Specify how you want the alerts delivered.

### Send me alerts by:

- E-mail Barbara.Benstead@ama-assn.org
- Text Message (SMS)
- Send URL in text message (SMS)

### Change Type

Specify the type of changes that you want to be alerted to.

### Only send me alerts when:

- All changes
- New items are added
- Existing items are modified
- Items are deleted

### Send Alerts for These Changes

Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.

### Send me an alert when:

- Anything changes

Confirm the folder for which you want to be alerted of changes.

OK Cancel

Select the options for your alerts.



# DOCUMENT COLLABORATION

[ADD A DOCUMENT\(S\)](#)

[DELETE A DOCUMENT\(S\)](#)

[ADD A COMMENT TO A  
DOCUMENT](#)

[DOWNLOAD A DOCUMENT](#)



# Document Management

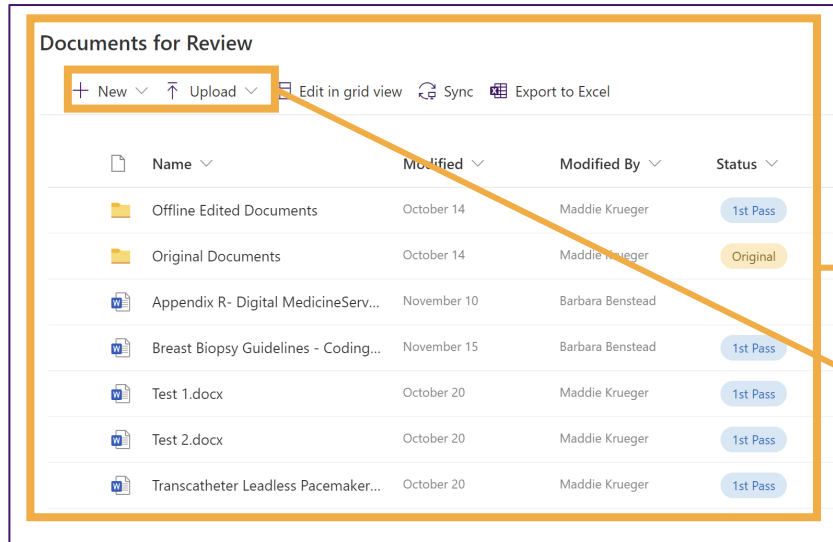
- Managing documents follows the same steps and processes, regardless of the location of the document on the site. This section covers the following topics:
  - How to:
    - Add a document(s)
    - Delete a document(s)
    - Add a comment to a document
    - Download document(s)





DOCUMENT MANAGEMENT

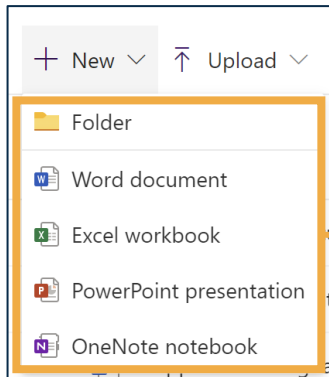
# Document Management- Add a Document(s)



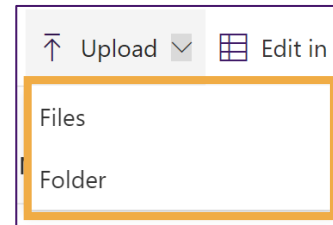
**Step #1:** Navigate to the desired location (document library) a document is to be uploaded or added to

Note: these same steps apply to any document library on the site

**Step #2:** Select either "New" or "Upload"



**Step #3a:** If select "New", select the desired material type from the drop down. To create a new, blank document, select "Word document" from the drop down



**Step #3b:** If select "Upload", select either "Files" or "Folder"

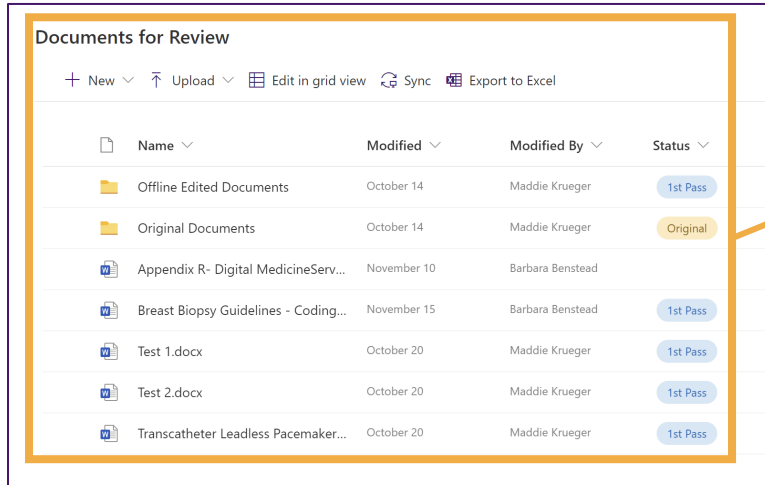
In the pop-up that appears, navigate to the desired document(s) to be uploaded. If multiple documents, hold the Control key on the keyboard and select each document. Once all desired documents are selected, select "Open"

Note: can upload multiple documents at one time, following the instructions above



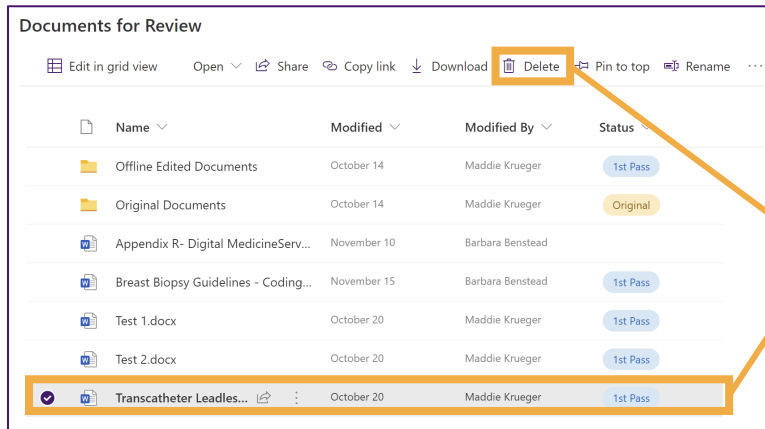
DOCUMENT MANAGEMENT

# Document Management- Delete a Document(s)



**Step #1:** Navigate to the location of the document that is to be deleted

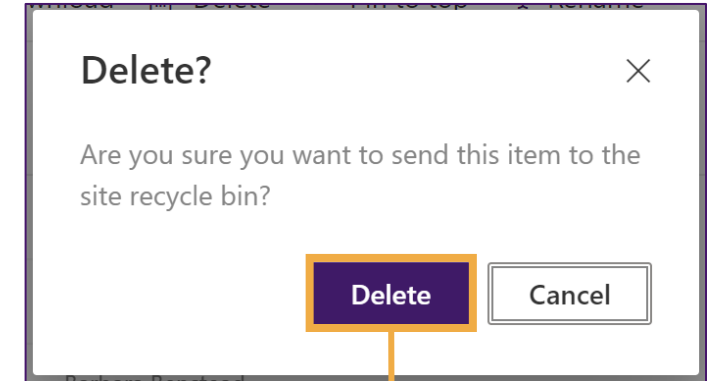
Note: these same steps apply to any document library on the site



**Step #2:** Select the document(s) that is to be deleted by clicking in the circle(s) on the far-left side of the row(s)

Note: can delete multiple documents at one time by highlighting all documents to be deleted

**Step #3:** Once the document(s) is highlighted, navigate to the tool bar posted just above the documents and select "Delete"

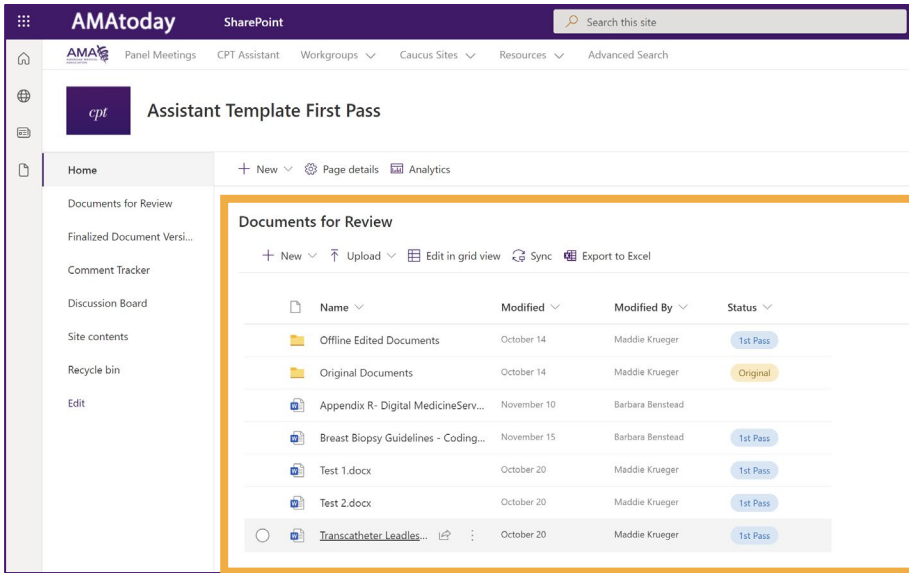


**Step #4:** Confirm the deletion of the document(s) by selecting "Delete"



DOCUMENT MANAGEMENT

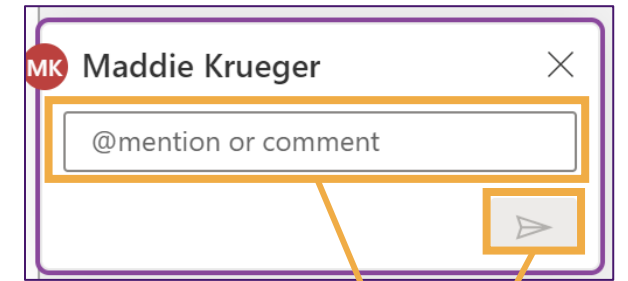
# Document Management- Comment on a Document



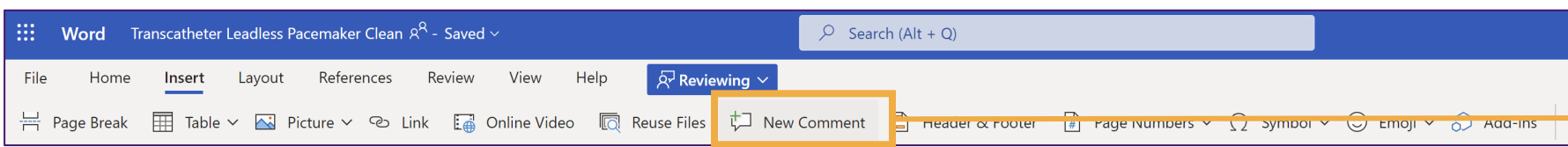
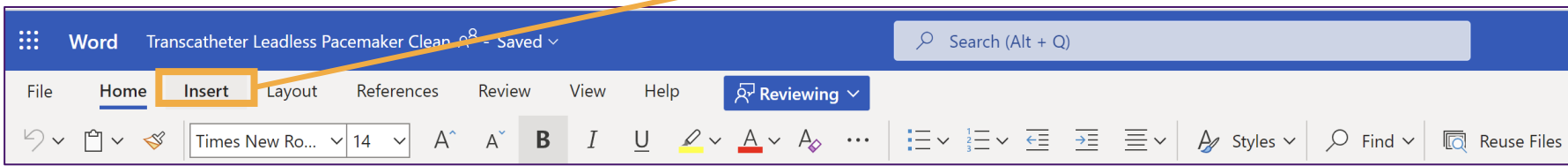
**Step #1:** Navigate to the location of the document that is to be commented on. Open desired document by clicking on the name of the document

Note: these same steps apply to any document posted on the site

**Step #2:** Once the document is open, navigate to the "Insert" section of the tool bar



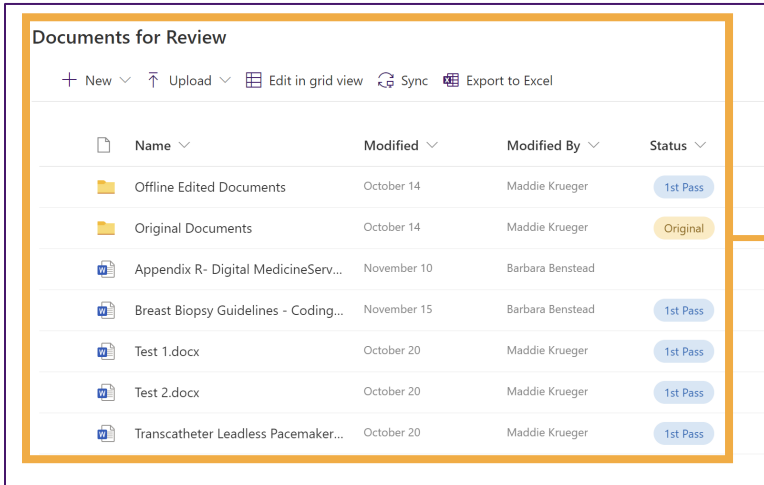
**Step #4:** Type the comment in the text box. Use the "@" to mention another user in the comment. Once completed, hit the send button in the bottom right corner



**Step #3:** Select "New Comment"

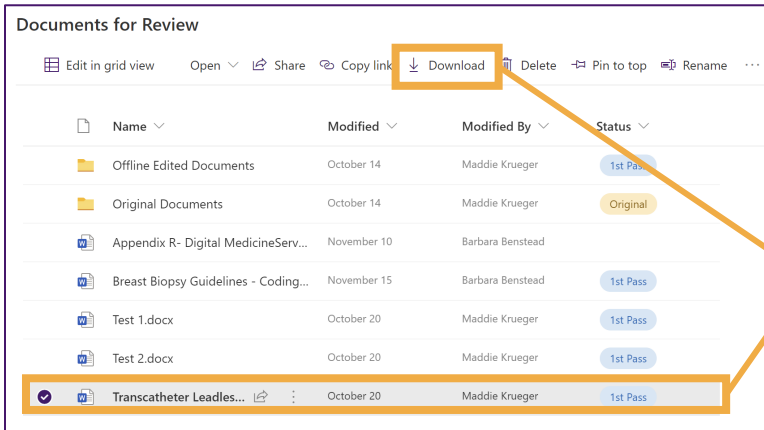
DOCUMENT MANAGEMENT

# Document Management- Download a Document(s)



**Step #1:** Navigate to the location of the document that is to be downloaded

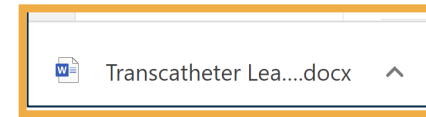
Note: these same steps apply to any document library on the site



**Step #2:** Select the document(s) that is to be downloaded by clicking in the circle(s) on the far-left side of the row(s)

Note: can download multiple documents at one time by highlighting all documents to be downloaded

**Step #3:** Once the document(s) is highlighted, navigate to the tool bar posted just above the documents and select "Download"



**Step #4:** View the document downloaded at the bottom of the screen or in your Downloads folder on your computer. Downloading multiple documents results in the download of a Zip File



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# SEARCH

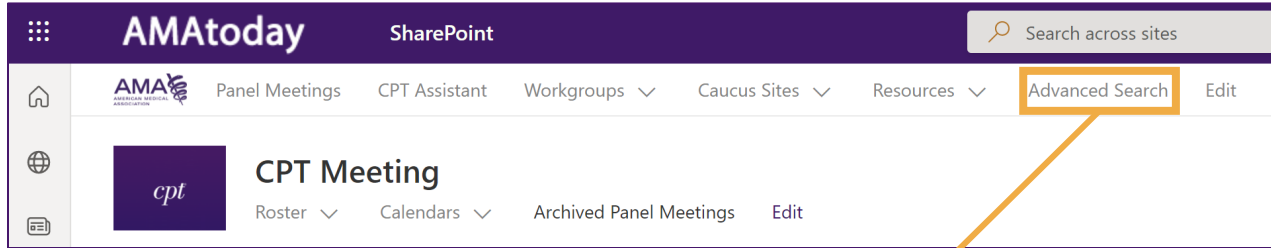
[ADVANCED SEARCH ACCESS](#)

[NON-ADVANCED SEARCH ACCESS](#)



SEARCH

# Advanced Search Access



**Step #1:** If you are CPT Staff, Panel Member, or Panel Staff, navigate to the hub navigation and select “Advanced Search”

**Step #3b (optional):** If desired, can use the advanced filters posted on the left side of the screen to narrow the results



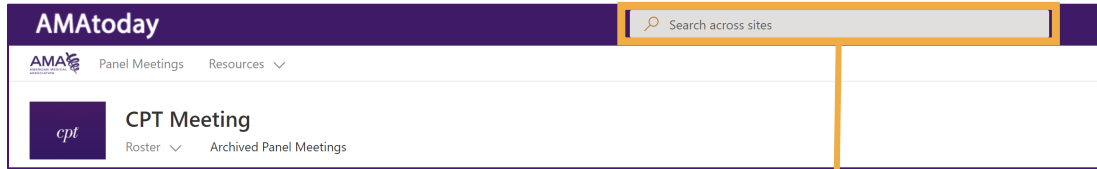
**Step #2:** Type your search into the search bar. Hit Enter

**Step #3a (optional):** If desired, can also click on either “CPT Meeting Content” or “All CPT Content” to narrow or broaden the search, respectively



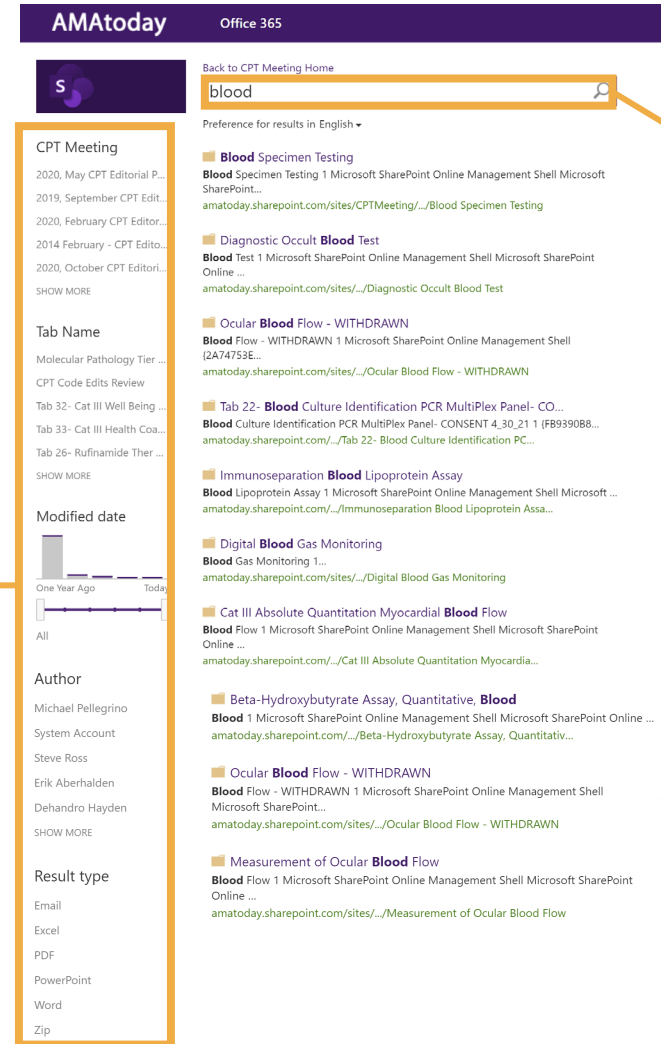
SEARCH

# Regular Search Access



**Step #1:** All users are able to access the non-advanced search capability by navigating to the search bar posted along the top of every page

**Step #3:** If desired, can use the non-advanced filters posted on the left side of the screen to refine the results



**Step #2:** Type your search into the search bar. Hit Enter



SEARCH

# Additional Search Information

The screenshot shows the SharePoint search interface for 'AMAtoday'. The search bar contains 'test'. The results list includes several items, with 'Test Document' highlighted. A preview window for 'Test Document' is open, showing a document icon, the title 'Test Document', a description 'test document. Modify Modifying document 12-15-21 (RY) ...', the URL 'amatoday.sharepoint.com/sites/.../subfolder test/Test Document.docx', and the author 'Rejina Young' with a timestamp '12/15/2021 12:31 PM'. Action buttons 'EDIT', 'POST', 'SEND', and 'VIEW LIBRARY' are visible at the bottom of the preview.

For both the advanced and non-advanced search, hovering over the name of a search result pulls up additional information about that result, as seen in the screenshot

This screenshot shows search results for 'test' with 'Tab 37- Gadolinium Test' highlighted. A preview window for this folder is open, displaying the title 'Tab 37- Gadolinium Test', the type 'Folder', and the author 'Cole Mitchell' with a timestamp '11/15/2021 11:53 AM'. Action buttons 'OPEN', 'SEND', and 'VIEW LIBRARY' are shown. The URL 'https://amatoday.sharepoint.com/sites/CPTMeeting/sept21/Code Changes Documenta' is highlighted in the results list.

Additionally, clicking on the URL posted for a search result to expand it and scanning the URL provides information such as the location of the result on the site, the meeting the result is contained in, etc.





# Return to Home from Search

AMAtoday Office 365

Back to CPT Meeting Home

blood

Preference for results in English

**CPT Meeting**

2020, May CPT Editorial P...  
2019, September CPT Edit...  
2020, February CPT Editor...  
2014 February - CPT Edito...  
2020, October CPT Editori...  
SHOW MORE

**Tab Name**

Molecular Pathology Tier ...  
CPT Code Edits Review  
Tab 32- Cat III Well Being ...  
Tab 33- Cat III Health Coa...  
Tab 26- Rufinamide Ther ...  
SHOW MORE

**Modified date**

One Year Ago Today

All

**Author**

Michael Pellegrino

**Blood Specimen Testing**  
Blood Specimen Testing 1 Microsoft SharePoint Online Management Shell Microsoft SharePoint...  
amatoday.sharepoint.com/sites/CPTMeeting/.../Blood Specimen Testing

**Diagnostic Occult Blood Test**  
Blood Test 1 Microsoft SharePoint Online Management Shell Microsoft SharePoint Online ...  
amatoday.sharepoint.com/sites/.../Diagnostic Occult Blood Test

**Ocular Blood Flow - WITHDRAWN**  
Blood Flow - WITHDRAWN 1 Microsoft SharePoint Online Management Shell (2A74753E...  
amatoday.sharepoint.com/sites/.../Ocular Blood Flow - WITHDRAWN

**Tab 22- Blood Culture Identification PCR MultiPlex Panel- CO...**  
Blood Culture Identification PCR MultiPlex Panel- CONSENT 4\_30\_21 1 (FB9390B8...  
amatoday.sharepoint.com/.../Tab 22- Blood Culture Identification PC...

**Immunoseparation Blood Lipoprotein Assay**  
Blood Lipoprotein Assay 1 Microsoft SharePoint Online Management Shell Microsoft ...  
amatoday.sharepoint.com/.../Immunoseparation Blood Lipoprotein Assa...

**Digital Blood Gas Monitoring**  
Blood Gas Monitoring 1...  
amatoday.sharepoint.com/sites/.../Digital Blood Gas Monitoring

**Cat III Absolute Quantitation Myocardial Blood Flow**  
Blood Flow 1 Microsoft SharePoint Online Management Shell Microsoft SharePoint Online ...  
amatoday.sharepoint.com/.../Cat III Absolute Quantitation Myocardia...

**Beta-Hydroxybutyrate Assay, Quantitative, Blood**  
Blood 1 Microsoft SharePoint Online Management Shell Microsoft SharePoint Online ...

For both the advanced and non-advanced search, to return to the homepage, select the link labeled “Back to CPT Meeting Home” posted just above the search bar



# THANK YOU

