Capital Expenditure Reporting User Guide

FOR THE MINNESOTA DEPARTMENT OF HEALTH, HEALTH ECONOMICS PROGRAM (HEP) DATA PORTAL

February 2026

Capital Expenditure Reporting User Guide

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Purpose

The purpose of this document is to guide reporting entities on the process for registering and managing a reporting entity account and submitting Annual Reports on the Minnesota Department of Health (MDH) website for the Health Economics Program (HEP).

Technical Requirements

The HEP Data Portal functions on the following browsers: Google Chrome, Microsoft Edge, and Mozilla Firefox.

Register

Prior to filing a data set, reporting organizations must register a primary contact on the MDH website using the HEP Data Portal. Once a request to register has been submitted, MDH reviews and approves requests. Only the first user registration needs to be approved by MDH. Subsequent users can be added on demand with no approval required. Approved registrants will receive an email through which they can activate their account and set their passwords. Successful activation of an account completes the registration process for a primary contact.

Refer to the Registration and Account Management Guide (PDF) for more information.

Background on capital expenditure reporting

Minnesota Statutes 62J.17, require health care providers in Minnesota to report all major capital spending commitments of $1 million or more to MDH for retrospective review. Providers, including hospitals, ambulatory surgical centers, diagnostic imaging centers, physician clinics and other providers, must report to MDH on an annual basis as part of existing annual financial and statistical reports.

Minnesota Statutes 62J.17 was modified during the 2007 legislative session to require the ***annual*** submission of major capital expenditure commitments. This reporting is included with the diagnostic imaging utilization reporting.

General requirements

Complete and detailed information must be included in all reports for the Commissioner of Health to conduct retrospective reviews of major capital spending commitments. Providers that do not pass annual retrospective review may proceed with current capital spending commitments. However, if a provider fails retrospective review, all major spending commitments made by that provider are subject to prospective review for five years.

All reports for the prior fiscal year are due on ***March 1.***

Capital expenditure reports

Create annual report

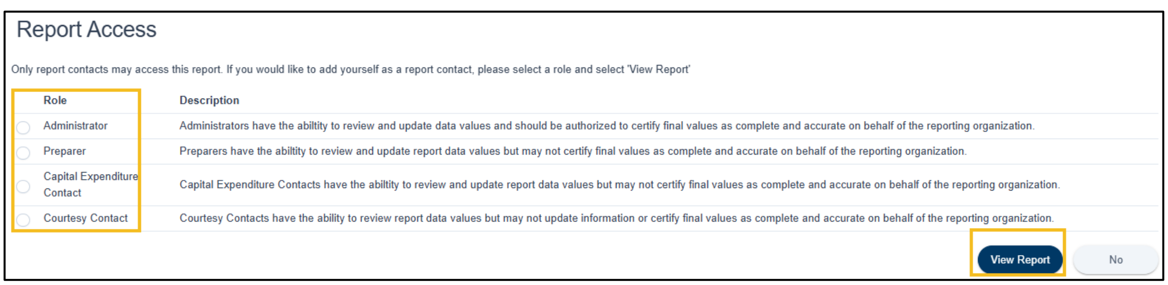
1. From the Home Page, click on the drop-down "Menu" located in the upper-right of the window and click "Annual Reports" or from the Dashboard under 'Pending Reports' locate a new report and click the "Create" annual report button.


PENDING REPORTS

Actions	Report Type	Report Year	ID	Organization	Report Status	Due Date
Create	CERRR	Fiscal Year 2025	1537	2nd Affiliate	Pending Submission	03/01/2026
View	CERRR	Fiscal Year 2025	1536	New Affiliate	Pending Submission	03/01/2026
View	CERRR	Fiscal Year 2025	1535	NM Capital Expenditure	Information Required	03/01/2026

Note: Annual reports will be available for each affiliate that has been added under the organization for the designated report year. Refer to the **Registration and Account Management Guide (PDF)** for information on adding and managing affiliates.

2. Select a role for report access, then click the "View Report" button. The **Administrator** role will allow the report contact to review and update data values, as well as certify final values. The **Preparer** and **Capital Expenditure Contact** roles will allow the report contacts to review and update values; however, the report contacts will not be able to certify the report. The **Courtesy Contact** role will allow the report contact to review report data; however, the report contact will not be able to update information or certify the report.


Report Access

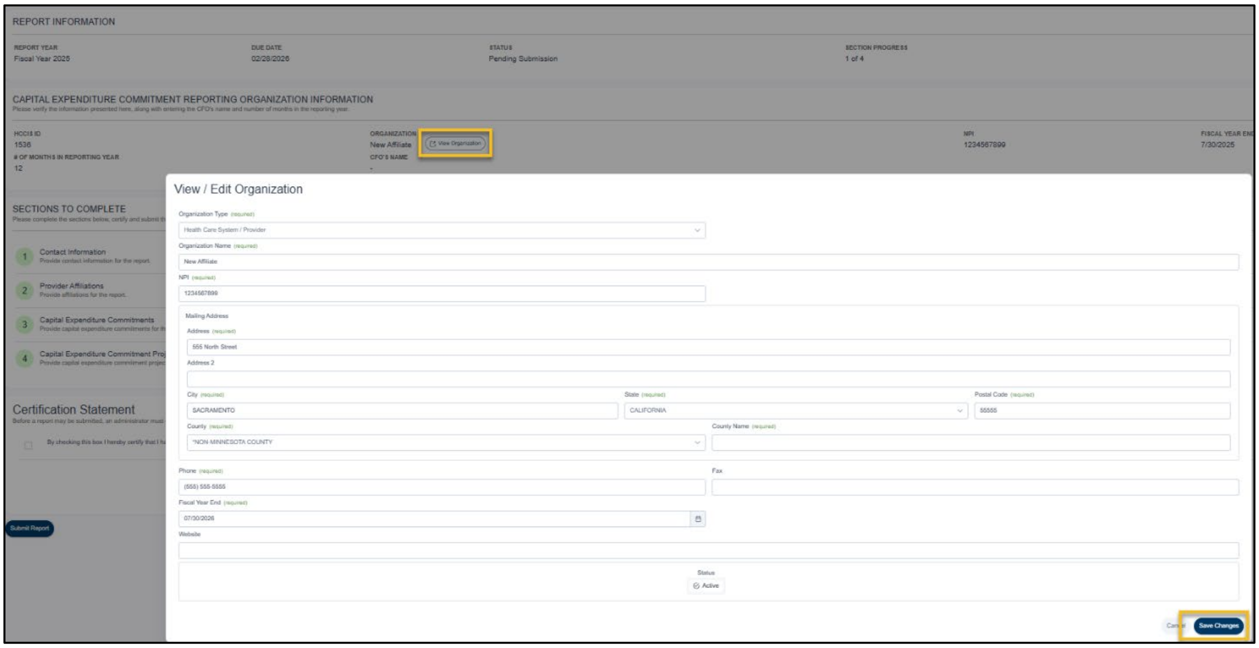
Only report contacts may access this report. If you would like to add yourself as a report contact, please select a role and select 'View Report'

Role	Description
Administrator	Administrators have the abiltity to review and update data values and should be authorized to certify final values as complete and accurate on behalf of the reporting organization.
Preparer	Preparers have the abiltity to review and update report data values but may not certify final values as complete and accurate on behalf of the reporting organization.
Capital Expenditure Contact	Capital Expenditure Contacts have the abiltity to review and update report data values but may not certify final values as complete and accurate on behalf of the reporting organization.
Courtesy Contact	Courtesy Contacts have the ability to review report data values but may not update information or certify final values as complete and accurate on behalf of the reporting organization.

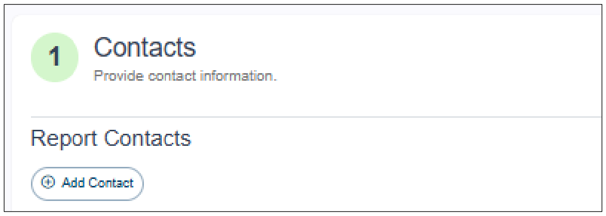
View Report No

Note: Roles can be updated after the original designation by returning to 'Section 1 – Contacts' and editing the role by clicking the 'Edit Role' pencil icon. Only Administrators and Preparers can make updates to report contact roles. Refer to the **Registration and Account Management Guide (PDF)** for information on report access.

3. Under the Capital Expenditure Commitment Reporting Organization Information section, options are available to view organization details by clicking the 'View Organization' button. Update information, then click the 'Save Changes' button.

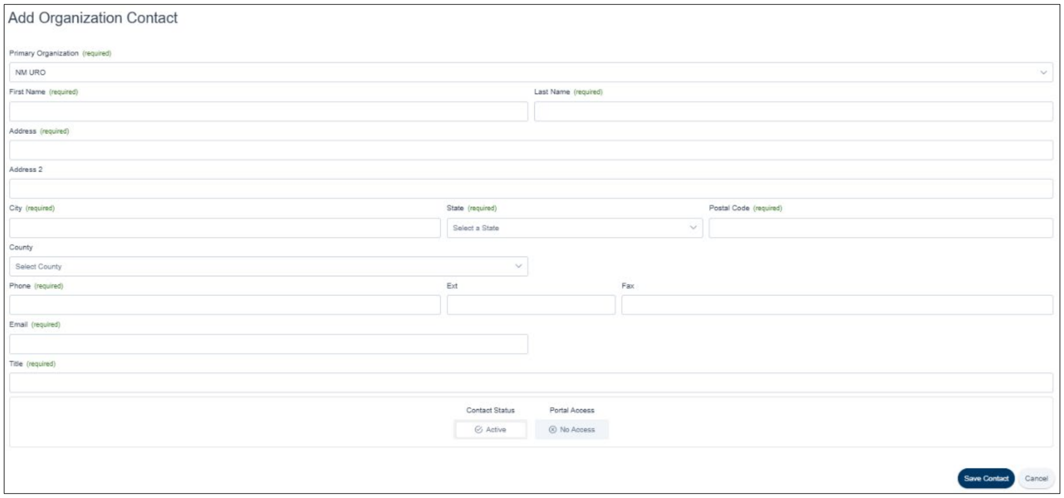


4. **Section 1 – Contacts**
   a. For the "Contacts" section, click the "View Section" button to start. Add additional report contacts if needed by clicking the "Add Contact" button.



   b. For each contact to be added to the report, select a role from the drop-down menu, then click the "Add Selected" button.

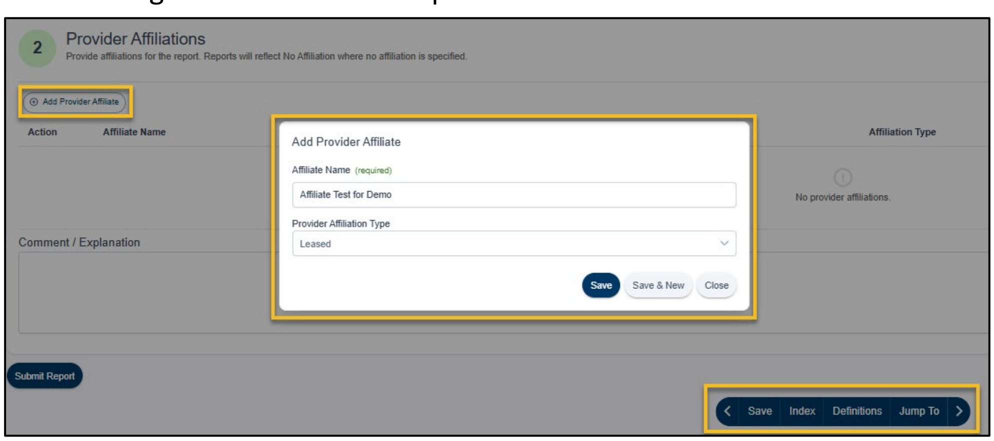
c. If the desired contact is not available, click the “New Contact” button, enter required information marked “(required)” in green font, then click the “Save Contact” button. Users by default will be ‘Active.’ To add a contact that will have portal access, click on the “Portal Access” status to switch to “Has Access.”



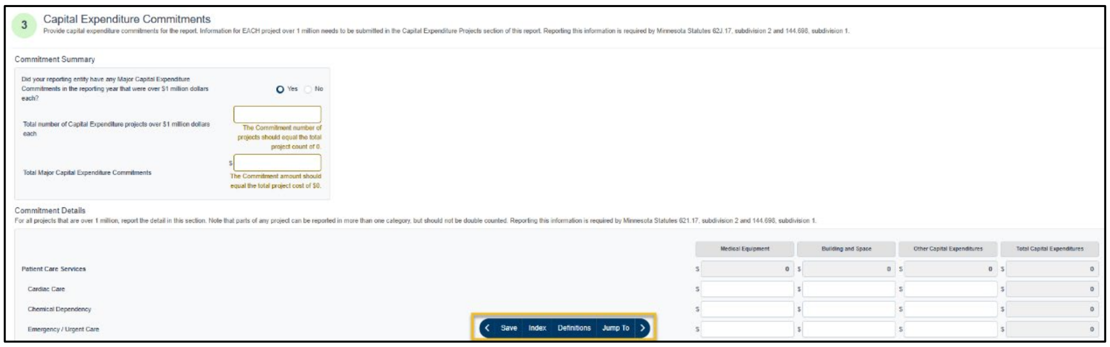
d. Enter optional Comments/Explanation, then click the “Right Arrow” button to proceed to the next section.

> **Note:** Each section of the annual report data entry screen includes a “Definitions” button at the bottom of the page. Click the “Definitions” button to review information relevant to the current screen. Additionally, validation warnings may be displayed as data is entered. Users should review validation warnings and correct data or include an explanation verifying data as entered.

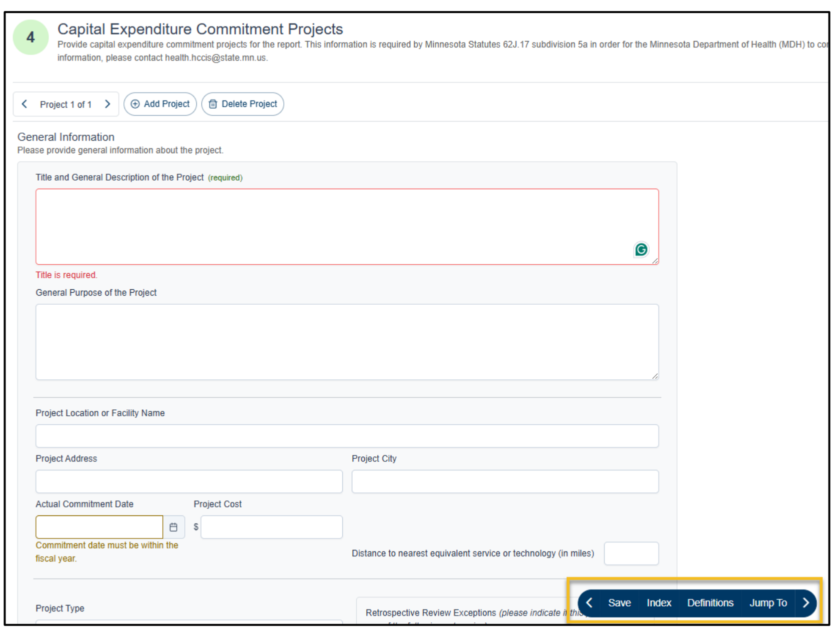
5. **Section 2 – Provider Affiliations**
   a. Click the ‘Add Provider Affiliate’ button. Next, enter the affiliate name and select the provider affiliation type, click the ‘Save’ button.
   b. Click the “Right Arrow” button to proceed to the next section.



6. **Section 3 – Capital Expenditure Commitments**
    a. Indicate whether your reporting entity had any major capital expenditure ***commitments*** in the reporting year that were in excess of $1 million dollars each.
    b. If there was a commitment for a new facility, not yet assigned an ID, please navigate to My Organization and click the Add Affiliate button to add a new Health Care System / Provider. Once added, a Capital Expenditure Retrospective Review Report (CERRR) will be available for the new facility under the Annual Reports page.
    c. Click the "Right Arrow" button to proceed to the next section.



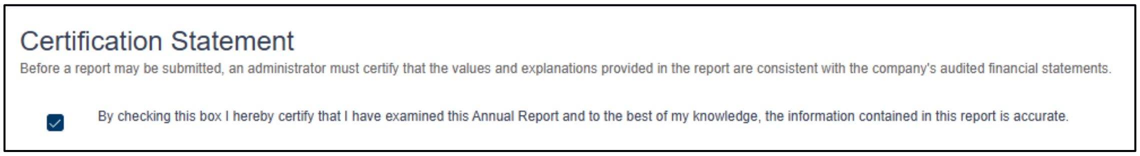
7. **Section 4 - Capital Expenditures Commitment Projects**
    a. Click the "Add Project" button, enter data and click the "Save Project" button. To delete a project, click the 'Delete Project' button and 'Confirm' to complete the deletion.
    b. Click the "Right Arrow" button to proceed to the next section.



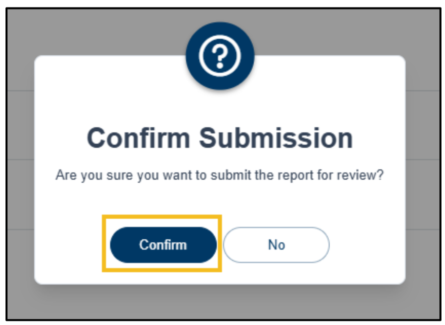
    c. Proceed to the '**Certify and submit annual report**' instructions below.

Certify and submit annual report

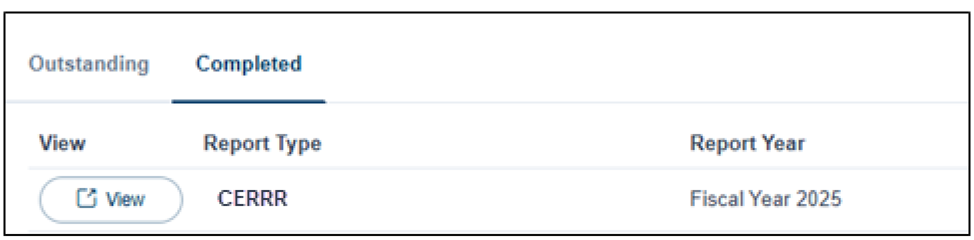
1. Annual Reports must be certified by an administrator user. If the user is a 'Preparer' or 'Courtesy Contact' the Annual Report cannot be certified and submitted. If the user is an Administrator, return to the index page, by clicking the "Back to Index" button. Next, scroll to the bottom of the page and click the certification checkbox.



2. Click the "Submit Report" button to submit to the Annual Report to MDH for review, then click the "Confirm" button to finalize.



3. Once the report is submitted, it will be available under the "Completed" tab of the Annual Reports page. Reports can be modified until MDH has completed their review as indicated by a status of "Review Complete."



4. If MDH requires additional information, the report will appear under the “Outstanding” tab of the Annual Reports page with a status of “Information Required.” Reports requiring additional information should be updated and resubmitted for MDH review.

Outstanding Completed

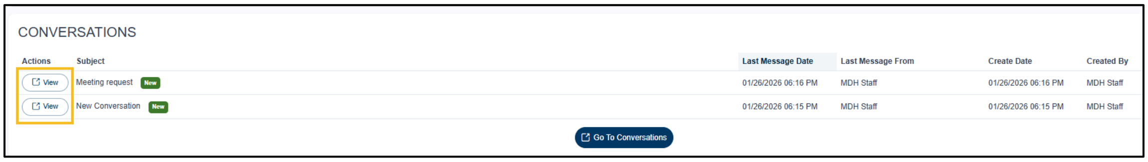
Actions	Report Type	Report Year	ID	Organization	Report Status
View	CERRR	Fiscal Year 2025	1536	New Affiliate	Pending Submission
View	CERRR	Fiscal Year 2025	1535	NM Capital Expenditure	Information Required

Note: Once MDH completes their review of the report, the status will reflect “Review Complete.” After this time, no updates can be made. To update a report that has been submitted but not reviewed by MDH, access the “Completed” tab, locate the report, and click the “View” button.

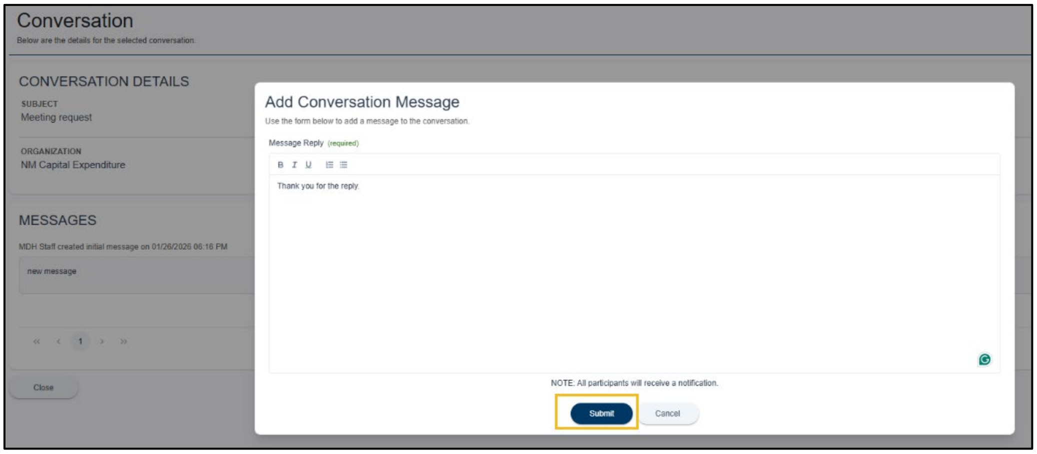
Conversations

Health Care System/Provider registered users will receive email notifications when new messages are available in the portal. Messages will be available under the Conversations section of the Home Page Dashboard.

1. From the Home Page Dashboard, under "Conversations" click the "View" button for a conversation.



2. To reply, click the "Add Message" button, enter message reply, then click the "Submit" button.



3. To access all conversations, click the "Go to Conversations" button from the Home Page Dashboard. Conversations can be filtered by date range as well as Open / Closed by clicking the "Open Conversations" and "All Conversations" buttons.

References

- HEP Data Portal (https://hepdataportalui.web.health.state.mn.us/signinregister)
- Registration and Account Management Guide (PDF) (https://www.health.state.mn.us/data/economics/uror/docs/userguide.pdf)
- Minnesota Statutes 62J.17 (https://www.revisor.mn.gov/statutes/cite/62J.17)