



Demarcation Exemption System Helpfile

2022

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Introduction

Providers of indemnity products that conduct the business of a medical scheme and who were granted exemption during 2019 are required to submit renewal applications. This helpfile will assist Insurers to submit the required information.

Data officer Sign up

Please ensure the Data Officer who will be responsible for submitting the required information is registered by the CEO of the Insurers using this [link](#).

Once the approval process is complete the data officer will receive an email like the one below, please follow the instructions to create your password. Please use the windows app to submit your renewal application i.e., the second link on the email below.

For ease of reference the link is <https://www.medicalschemas.com/Apps/ASRUploadTool/publish.html>

Dear Smily Monque,

You have been added as a Data Officer to Bryte Insurance Company Limited.

If you have not received your password, please visit the portal <https://www.medicalschemas.com/ASB>, or install the windows app from : <https://www.medicalschemas.com/Apps/ASRUploadTool/publish.html>.

Select the "forgot your password" link, in order to create a password.

Please note that your email address is your username.

Kind Regards
Council for Medical Schemes

Launch of the Windows App

You will be taken to a screen like below, follow the on-screen instructions. Click on **Launch**

Council for Medical Schemes
CMS Upload Tool x64 bit

Name: CMS Upload Tool x64 bit
Version: 1
Publisher: Council for Medical Schemes

The following prerequisites are required:

- Microsoft .NET Framework 4.6.1 (x86 and x64)

If these components are already installed, you can

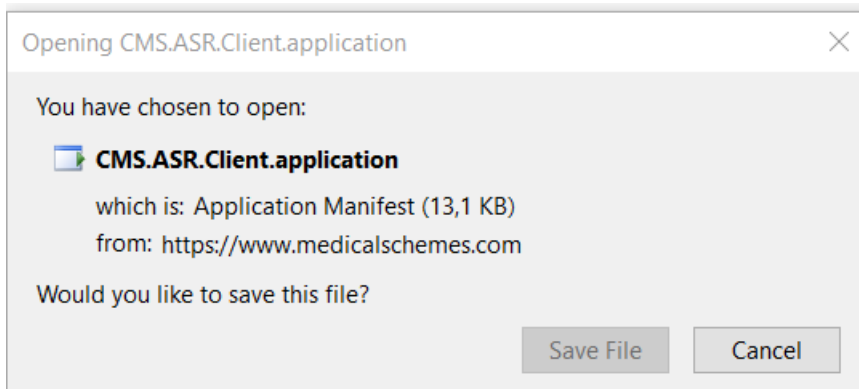
Launch

the application now. Otherwise, click the button below to install the prerequisites and run the application.

Install

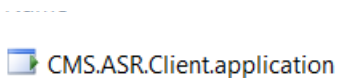
If this instal fails with the message : "Failed to Download", please set following registry key:
[HKEY_CURRENT_USER\Software\Microsoft\Windows\CurrentVersion\Internet Settings] "DisableCachingOfSSLPages"=dword:00000000

Council for Medical Schemes Customer Support :: ClickOnce and .NET Framework Resources



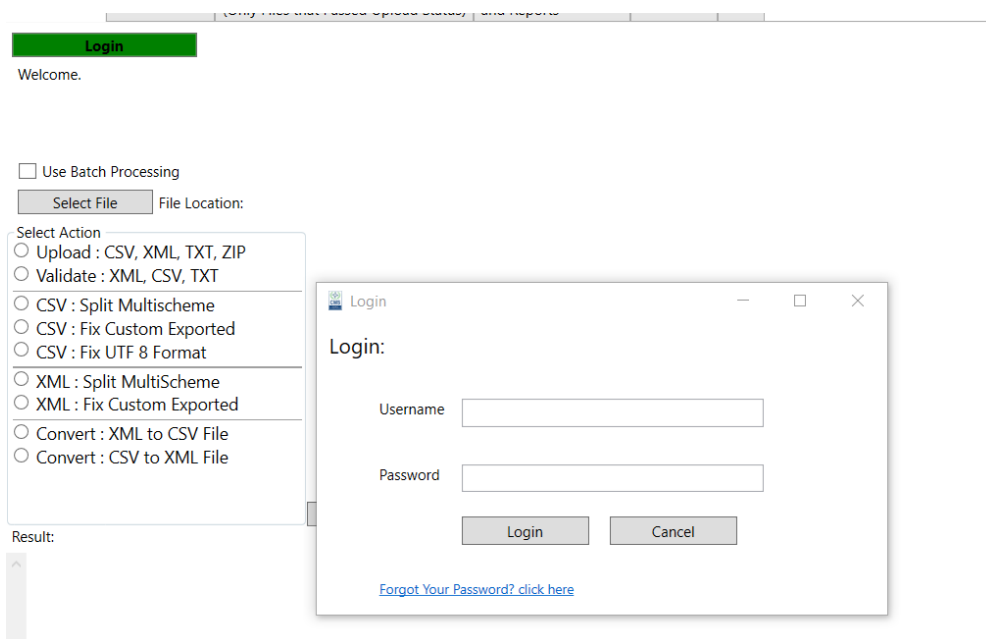
Click on **Save File**, the file will be saved on your Downloads folder in your C drive.

Navigate to your downloads folder and click on the icon like the icon represented below.




The application will install, and you will be presented with the tool below

When accessing this for the first time, you will have to click on 'Forgot Your Password' to create your password.



You will see a screen like below, enter the email address you sent through to CMS for registration and click 'Recover Forgotten Password'



Recover Password

Username

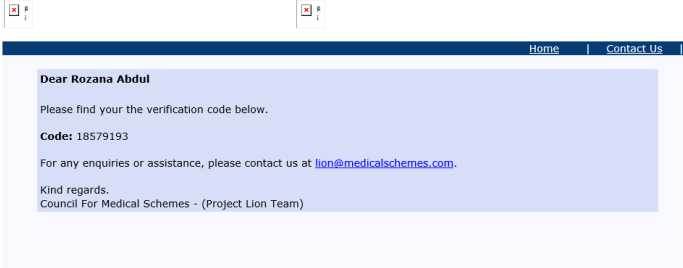
Recover Forgotten Password

Enter the code you will receive in your email from cms_publications@medicalschemes.co.za in the screen you now see which will look like the one below. If you do not receive this email, please check your junk/spam email. The email will be addressed to you and will resemble the one below.

Account Recovery

CP CMS_Publications <cms_publications@medicalschemes.co.za>
To: Rozana Abdul

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.



Home | Contact Us


Dear Rozana Abdul

Please find your the verification code below.

Code: 18579193

For any enquiries or assistance, please contact us at lion@medicalschemes.com.

Kind regards,
Council For Medical Schemes - (Project Lion Team)



Recover Password Verification

A verification code has been sent to your email address. Please enter verification code in the space provided.

Verification Code

Verify Regenerate Digit Token

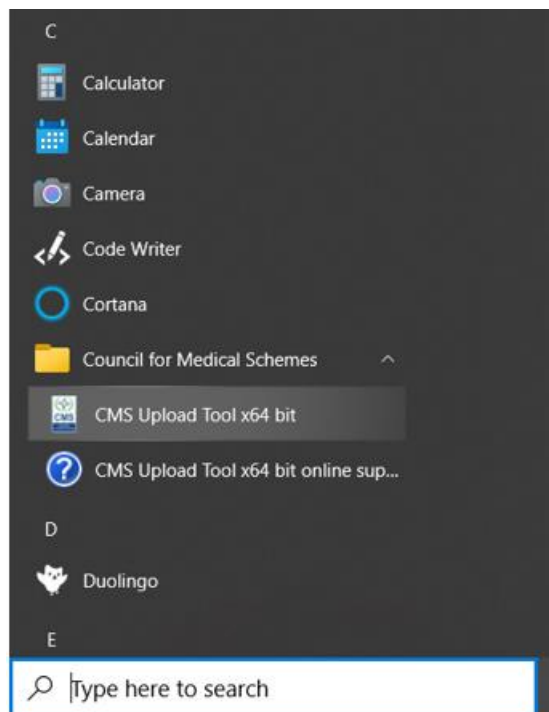
Click on Verify, and create your password, which must be a strong one, contain a mix of capital letters, small letters, numbers.



The image shows a web form titled "Change Password" for the CMS (Council for Medical Schemes). The form has a header with the CMS logo and name. Below the header, there are two input fields: "New Password" and "Confirm New Password". The "New Password" field is currently filled with ten dots. The "Confirm New Password" field is currently empty and has the placeholder text "Password". At the bottom of the form, there is a blue button labeled "Change Password".

Once you create your password, the system will log you into the portal, please log off from here and go back to the toll you installed on your PC.

You can access this tool from your installed programs at any time, by clicking on the Windows button on the bottom left of your computer, you will find it under Council for Medical Schemes, click on **CMS Upload Tool x64 bit**



You will now be presented with the below

CMS Upload Tool

File Contact Us

Validate/Upload Uploaded Files Validation Results (Only Files that Passed Upload Status) Final Submit / Unlock and Reports Downloads Links

Login

Welcome.

☐ Use Batch Processing

Select File File Location:

Select Action

- ☐ Upload : CSV, XML, TXT, ZIP
- ☐ Validate : XML, CSV, TXT
- ☐ CSV : Split Multischeme
- ☐ CSV : Fix Custom Exported
- ☐ CSV : Fix UTF 8 Format
- ☐ XML : Split Multischeme
- ☐ XML : Fix Custom Exported
- ☐ Convert : XML to CSV File
- ☐ Convert : CSV to XML File

Execute Copy Result to Clipboard

Result:

Login

Click on Login

Your username is your email address and type in the password you created, click on login

Login

Login:

Username

Password

Login Cancel

[Forgot Your Password? click here](#)

Once authenticated, your screen will look like the below.

[Logout](#)

Welcome.

☐ Use Batch Processing

File Location:

Select Action

☐ Upload : CSV, XML, TXT, ZIP☐ Validate : XML, CSV, TXT☐ CSV : Split Multischeme☐ CSV : Fix Custom Exported☐ CSV : Fix UTF 8 Format☐ XML : Split MultiScheme☐ XML : Fix Custom Exported☐ Convert : XML to CSV File☐ Convert : CSV to XML File☐ Skip Python

Result:



Download Templates

You will first need to download the Templates. Click on Downloads

The Entity will be your Insurer/FSP. You will download the part one by one, using the Part dropdown. Example choose DM1 and click on 'Download file to csv', you will do this for all 19 parts. The files get saved in one directory; you can access this directory by clicking on 'Open Export Directory'

CMS Upload Tool

File

Filter Entities

Contact Us

Validate/Upload

Uploaded Files

Validation Results
(Only Files that Passed Upload Status)

Final Submit / Unlock
and Reports

Downloads

Links

Admin

Templates and submitted Data

Lookups / OData

You can download a template in csv format.
Files are provided in a pipe-delimited() csv format.

Download Type

Template

Entity

mmed

Return

2021 : Demarcation : Annual

Part

DM1

Download file to csv

Open Export Directory

<

>

As you download, you will see the build-up on screen

The screenshot shows the 'CMS Upload Tool' interface. At the top, there are tabs for 'File', 'Filter Entities', and 'Contact Us'. Below these are several buttons: 'Validate/Upload', 'Uploaded Files', 'Validation Results (Only Files that Passed Upload Status)', 'Final Submit / Unlock and Reports', 'Downloads', 'Links', and 'Admin'. The 'Downloads' tab is active, showing 'Templates and submitted Data' and 'Lookups / OData'. A message states: 'You can download a template in csv format. Files are provided in a pipe-delimited(|) csv format.' Below this are four dropdown menus: 'Download Type' (set to 'Template'), 'Entity' (set to 'mmed'), 'Return' (set to '2021 : Demarcation : Annual'), and 'Part' (set to 'DM11'). At the bottom, there are two buttons: 'Download file to csv' and 'Open Export Directory'. A log of file retrievals is displayed below the buttons, showing timestamps and file locations for DM1, DM10, and DM11. A blue arrow points from the 'Open Export Directory' button to the file explorer screenshot below.

2021/11/29 16:25:14 : Starting data retrieval for part DM1. This could take several minutes depending on the size of the file.
2021/11/29 16:25:14 : Template retrieved for Part=DM1. Busy saving file to your documents folder.
2021/11/29 16:25:14 : File retrieved for DM1. File location: \\CMSNAS02\Users\AbdulR\Documents\CMS_ASR\ASR_Template_DM1_20211129162514.csv
2021/11/29 16:25:22 : Starting data retrieval for part DM10. This could take several minutes depending on the size of the file.
2021/11/29 16:25:22 : Template retrieved for Part=DM10. Busy saving file to your documents folder.
2021/11/29 16:25:22 : File retrieved for DM10. File location: \\CMSNAS02\Users\AbdulR\Documents\CMS_ASR\ASR_Template_DM10_20211129162522.csv
2021/11/29 16:25:26 : Starting data retrieval for part DM11. This could take several minutes depending on the size of the file.
2021/11/29 16:25:26 : Template retrieved for Part=DM11. Busy saving file to your documents folder.
2021/11/29 16:25:26 : File retrieved for DM11. File location: \\CMSNAS02\Users\AbdulR\Documents\CMS_ASR\ASR_Template_DM11_20211129162526.csv

Clicking on 'Open Export Directory' you will see the below files and folders automatically created for you. The templates are these.

The screenshot shows a Windows file explorer window titled 'SR' with the address bar set to 'This PC > Documents > CMS_ASR'. The window displays a list of files and folders. The files are all CSV templates, named 'ASR_Template_DM1_20211109105949.csv' through 'ASR_Template_DM14_20211109110005.csv'. The folders include 'AccessConvert_Failed', 'AccessConvert_Success', 'CSVConvert_Failed', 'CSVConvert_Success', 'CSVToXML', 'Input', 'Upload_Failed', 'Upload_Success', 'Validated_Failed', 'Validated_Success', 'Work', and 'Work_Failed'. A blue arrow points from the 'Open Export Directory' button in the previous screenshot to the 'ASR_Template_DM1_20211109105949.csv' file in this list.

Name	Date modified	Type	Size
AccessConvert_Failed	2021/11/09 10:56	File folder	
AccessConvert_Success	2021/11/09 10:56	File folder	
CSVConvert_Failed	2021/11/09 10:56	File folder	
CSVConvert_Success	2021/11/09 10:56	File folder	
CSVToXML	2021/11/09 10:56	File folder	
Input	2021/11/09 10:56	File folder	
Upload_Failed	2021/11/09 10:56	File folder	
Upload_Success	2021/11/09 10:56	File folder	
Validated_Failed	2021/11/09 10:56	File folder	
Validated_Success	2021/11/09 10:56	File folder	
Work	2021/11/09 10:56	File folder	
Work_Failed	2021/11/09 10:56	File folder	
ASR_Template_DM1_20211109105949.csv	2021/11/09 10:59	Microsoft Excel Co...	1 KB
ASR_Template_DM2_20211109110026.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM3_20211109110029.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM4_20211109110032.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM5_20211109110036.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM6_20211109110039.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM7_20211109110042.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM8_20211109110045.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM9_20211109110048.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM10_20211109105952.csv	2021/11/09 10:59	Microsoft Excel Co...	1 KB
ASR_Template_DM11_20211109105957.csv	2021/11/09 10:59	Microsoft Excel Co...	1 KB
ASR_Template_DM12_20211109110000.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM13_20211109110003.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB
ASR_Template_DM14_20211109110005.csv	2021/11/09 11:00	Microsoft Excel Co...	1 KB

Open up each template and complete them as specified in the [Data Specification Guideline](#)

Once you have completed entering your data into your csv files, you can start to upload them.

Delimiting your CSV file

When you open your .csv file which by default opens in excel, on occasion all the fields display as one column, follow the steps below so that the fields occupy their own separate columns.

Enlarge column A of the excel sheet, you must do this step first

The screenshot shows the Microsoft Excel interface with the 'Convert Text to Columns Wizard - Step 1 of 3' dialog box open. The dialog box has a title bar with a question mark and a close button. The main text says 'The Text Wizard has determined that your data is Delimited. If this is correct, choose Next, or choose the data type that best describes your data.' Below this, there are two radio buttons: 'Delimited' (selected) and 'Fixed width'. The 'Delimited' option has a description: '- Characters such as commas or tabs separate each field.' The 'Fixed width' option has a description: '- Fields are aligned in columns with spaces between each field.' Below the radio buttons is a 'Preview of selected data:' section showing a table of data. The table has 6 columns and 6 rows of data. The columns are: YearOfSpec, Part, RefNo, FinancialYear, AccNo, OtherAdmin, AdminService, AdminAccNo, TotalAdminFeesPaid, AdminFeesPaidPM. The data rows are: 1. 2021, DMS, 1053, 2020, Blackbird Group Pty (Ltd), Admin, 65,200.00, 65,200.00; 2. 2021, DMS, 1053, 2020, Essential Medical Cover Pty (Ltd), Admin, 15,200.00, 15,200.00; 3. 2021, DMS, 1053, 2020, K2015038780 SOUTH AFRICA (PTY) Ltd, Admin, 89,625.00, 89,625.00; 4. 2021, DMS, 1053, 2020, Day 1 Health (Pty) Ltd, Admin, 12,000.00, 12,000.00; 5. 2021, DMS, 1053, 2020, Axsure Insurance Brokers (Pty) Ltd, Admin, 44,400.00, 44,400.00. The dialog box has buttons for 'Cancel', '< Back', 'Next >', and 'Finish'. Numbered callouts 1 through 5 are placed around the dialog box and the Excel interface to indicate the steps: 1. Select all data that is now visible in column A; 2. Go to the Data menu item; 3. Click on Text to Columns; 4. Click on Delimited; 5. Click next.

1. Select all data that is now visible in column A
2. Go to the Data menu item
3. Click on Text to Columns
4. Click on Delimited
5. Click next

Convert Text to Columns Wizard - Step 2 of 3

This screen lets you set the delimiters your data contains. You can see how your text is affected in the preview below.

Delimiters

☒ Tab
☐ Semicolon
☒ Comma
☐ Space
☐ Other:

☐ Treat consecutive delimiters as one

Text qualifier: "

Data preview

YearOfSpec	Part	RefNo	FinancialYear	AccNo	OtherAdmin	AdminServ
2021	DMS	1053	2020		Blackbird Group Pty (Ltd)	Admin
2021	DMS	1053	2020		Essential Medical Cover Pty (Ltd)	Admin
2021	DMS	1053	2020		K2015038780 SOUTH AFRICA (PTY) Ltd	Admin
2021	DMS	1053	2020		Day 1 Health (Pty) Ltd	Admin
2021	DMS	1053	2020		Axsure Insurance Brokers (Pty) Ltd	Admin

Cancel < Back **Next >** Finish

6. Ensure Comma and Tab is ticked

7. Click next

8. Click finish

Validate/Upload Tab

Validate/Upload	Uploaded Files	Validation Results (Only Files that Passed Upload Status)	Final Submit / Unlock and Reports	Downloads	Links	Admin
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Logout

Upload your file to CMS. This tool will automatically first attempt to zip it to your local drive and only then upload the zipped file. Validation will be done on the CMS Server, not on your PC. This could take several minutes.

☐ Use Batch Processing

Select File D:\Documents\BA Work\Demarcation\2021\ASRTemplate_DM2_20211109110026.csv

Select Action

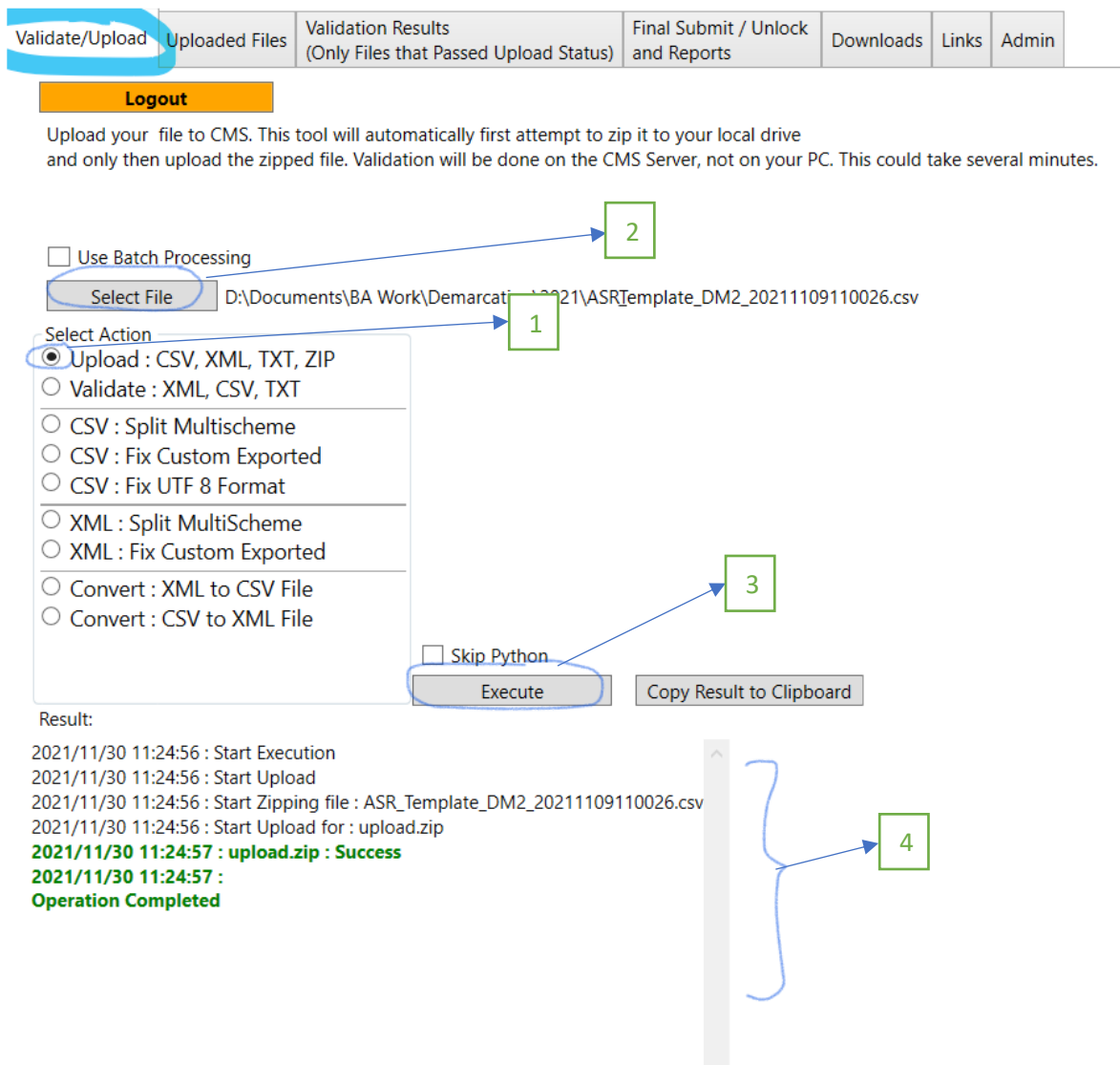
- ☒ Upload : CSV, XML, TXT, ZIP
- ☐ Validate : XML, CSV, TXT
- ☐ CSV : Split Multischeme
- ☐ CSV : Fix Custom Exported
- ☐ CSV : Fix UTF 8 Format
- ☐ XML : Split MultiScheme
- ☐ XML : Fix Custom Exported
- ☐ Convert : XML to CSV File
- ☐ Convert : CSV to XML File

☐ Skip Python

Execute **Copy Result to Clipboard**

Result:

```
2021/11/30 11:24:56 : Start Execution
2021/11/30 11:24:56 : Start Upload
2021/11/30 11:24:56 : Start Zipping file : ASR_Template_DM2_20211109110026.csv
2021/11/30 11:24:56 : Start Upload for : upload.zip
2021/11/30 11:24:57 : upload.zip : Success
2021/11/30 11:24:57 :
Operation Completed
```



- 1- Click on the very first option, this is for CSV uploads
- 2- Click 'Select File' and browse to the folder where you saved your prepared csv templates.
- 3- Click on 'Execute'
- 4- See the results of your uploads as they occur.

You will receive an email once your file is uploaded, alerting you if any errors were found in your file. The error messages are very specific and user friendly, you will be able to immediately see where your error is located and what the error is. Correct these errors on your csv templates and then re upload, continue this cycle until you get a successful upload.

Uploaded Files Tab

This tab will show you all the files you have uploaded. You can choose the dates to filter on date should you have done the upload across multiple days.

Red rows mean the files failed

Green rows mean the files uploaded successfully.

Validate/Upload **Uploaded Files** Validation Results (Only Files that Passed Upload Status) Final Submit / Unlock and Reports Downloads Links Admin

Uploaded Files Status Uploaded Files Detailed Log

Note: This data might be delayed by a few minutes! Please view the Detailed Log for more in depth detail about a file.

Select Dates of files to retrieve: Start Date 2021/11/30 15 End Date 2021/11/30 15

Execute Export to CSV Open Export Directory

Entity Name	File Name	Upload Date	Upload Time	Upload User	Status
African Unity Life Limited	DM1 - African Unity 1053.csv	11/30/2021	10:30:13 AM	b.tshele@medicalschemes.co.za	Failed
African Unity Life Limited	DM1 - African Unity 1053.csv	11/30/2021	10:38:51 AM	t.baloyi@medicalschemes.co.za	Failed
African Unity Life Limited	DM1 - African Unity 1053.csv	11/30/2021	10:38:58 AM	b.tshele@medicalschemes.co.za	Failed
African Unity Life Limited	DM1 - African Unity 1053.csv	11/30/2021	10:41:03 AM	b.tshele@medicalschemes.co.za	Success
African Unity Life Limited	DM1 - African Unity 1053.csv	11/30/2021	10:41:12 AM	b.tshele@medicalschemes.co.za	Success
African Unity Life Limited	DM1 - African Unity 1053.csv	11/30/2021	10:41:19 AM	t.baloyi@medicalschemes.co.za	Success

Correct all files that are red, the errors would have been emailed to you as explained above.

Final Submit

Once all your files have been uploaded without errors they would have a green highlight. You are now ready to final submit. Click on the **Final Submit/Unlock and Reports** tab

Validate/Upload Uploaded Files Validation Results (Only Files that Passed Upload Status) **Final Submit / Unlock and Reports** Downloads Links Admin

Final Submit / Unlock Reports

Return: 2021 : Demarcation : Annual

Refresh

Returns Type	Report Period	Refno	Entity Name	Submit	Date Locked	Locked by	Date Unl
Demarcation		DM1053	African Unity Life Limited	Submit			
Demarcation		DM1053	African Unity Life Limited	Unlock	1/10/2022 4:27:39 PM	r.harms@medicalschemes.co.za	

Click on the **Submit** button. Once clicked the row will be highlighted green and the Submit button will turn into an **Unlock** button.

Your submission will now be submitted to the Council for Medical Schemes for analysis.