

AmeraCare PBJ Guide

This is the Ameracare User Guide for collecting, entering, and reporting of PBJ data for submission to CMS. It covers the basic concepts and essential information to efficiently collect the data required and create the necessary reports and submission file.

We have tried to streamline the process to make PBJ submissions as quick and easy as possible, however, PBJ reporting encompasses a considerable amount of data.

Payroll Based Journal reporting is a federally-required program that must be completed and submitted in a timely manner; **this data must be reported**. CMS has a web site in place for either manual entry of that data or a provision for uploading a "batch" of data in one file.

The PBJ module in Ameracare provides the functionality for creating the batch file to upload as well as useful reports to help with determining staffing as defined by CMS and the PBJ requirements.

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PBJ - Overview

PBJ User Guide

Overview

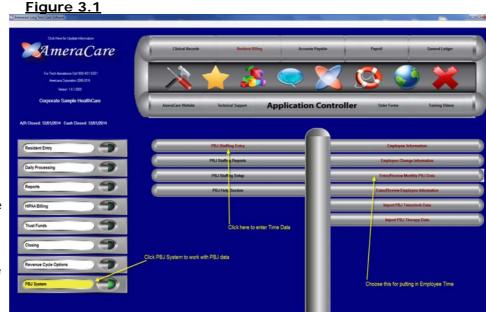
Ameracare has developed the programs necessary to handle the requirements of PBJ reporting. This new module can be used in conjunction with Ameracare's payroll module or independent of it.

The module has been added as part of the Billing menu since almost every facility with Ameracare has Billing but not all have Payroll.

See <u>Figure 3.1</u> for the initial menu selections to begin working with PBJ, more details will be covered later in this guide.

Essentially, the PBJ Staffing Report requirements involve the entry of paid time (in hours per date) of all direct-care employees including salary, hourly, administrative, and contracted workers. There are also 'optional' categories like housekeeping and maintenance.

This time data is generally collected on a monthly basis and reported to CMS quarterly with a maximum window of 45 days after the last day of the quarter as a deadline for submission. It can be imported from a time clock export file, or keyed in, or both...which is likely to be the usual situation and the PBJ module has been designed with this in mind.



PBJ - Links & Resources

PBJ User Guide

Links & Resources

The main source of information regarding PBJ can be found on the CMS site at www.cms.gov (no graphic shown here) That page and the various links on it contains virtually everything there is to know about the PBJ system and includes CMS's own manuals, guides, resources, and updates.

But this is not the site to sign up to become a PBJ submitter. The main page for that is www.qtso.com shown here in Figure 4.1

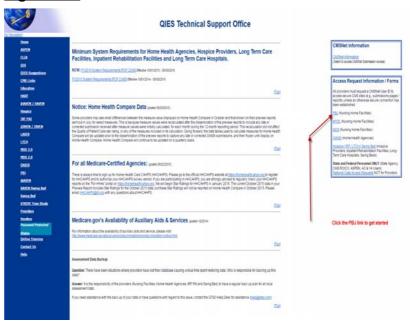
The red arrow points to the PBJ link which will take you to another screen which describes the required forms to fill out (seen here in Figure 4.2)

On this page are links to get signed up and the instructions for that process. Below that are two optional areas that you may want to complete. The first is the Corporate part of the "Corporate/Third Party Access" setup. This may apply if your facility is part of a larger corporation with many other facilities and they may have designated a corporate employee to handle PBJ submissions and reports for all their facilities.

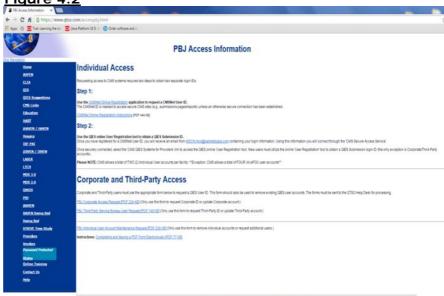
The second part of the "Corporate/Third-Party Access" section involves setting up an outside party to handle PBJ submissions for your facility in the event you wish to have someone else to manage your facilities' PBJ reporting.

Ameracare, for example, can be setup as your third-party submitter to function as a backup for you or if/when you need someone to step in and and complete the submission process.

Figure 4.1







Be sure to read the instructions and get your submitter ID; Then set up a corporate or third-party submitter to submit for you if desired.

PBJ - Requirements & Options

PBJ User Guide

Requirements & Options

Requirements: you must have a PBJ submitter ID and a connection to the site via the Juniper/Juno private VPN connection. This is actually the same connection that the MDS coordinator uses to upload MDS files. The only difference is selecting PBJ to upload instead. You can even use the connection credentials that your MDS coordinator uses to form the connection, but you must have your own PBJ submitter ID to sign in with after that connection is made.

Notable Exception: If your facility has signed up with SimpleLTC and uses the Automatic Uploader (and quite a few facilities do have this) then it may be that your MDS coordinator no longer uses the Juniper/Juno network connection, in which case you will have to get your own credentials to get that connection established before you can get signed up for PBJ submission.

Once connected and ready to upload, the required submission elements include all time data for direct-care employees, salaried, contract workers, therapists, pharmacy consultants and medical director hours paid. These hours must be only the basic data which consists of the employee ID, the date they worked, and the hours they worked on that date. No other data should be included, at least for reporting employee paid time.

There are also Census reporting requirements but this is included in the PBJ Quarterly report generated within Ameracare. However, this is not a count of beds occupied per date...it is a total number of census days for each month in the reporting quarter grouped by either Medicare, Medicaid, or Other financial classes.

This data can be uploaded as a batch file, or manually keyed in while on the PBJ site, but who wants to key in a massive amount of data when one has a system like Ameracare's PBJ Module to handle it all for you?

Options: those elements that involve non-direct-care employees which can include business office workers or billers, housekeeping, and maintenance employees are not required hours to submit. These are "optional" in the sense that CMS doesn't care if you report their time. You can include their time if you wish but it won't make any difference to your score.

PBJ - Getting Connected

password

Sign In

PBJ Guide

Getting Connected - 1

The main link to get into the PBJ (Or MDS) system is https://qies-west.cms.gov/dana-na/auth/url_default/welcome.cgi and requires the Juniper/Junos vpn network credentials you have applied for or your MDS user's login and password.

NOTE: You must use Internet Explorer to get to this site, Google's Chrome won't work

It is also VERY important to remember that this is a private vpn network connection that will block your computer's ability to access your network/server drives...this means you must have the PBJ submission file already on your own local C: drive before making this connection. It also means you will not be able to browse regular Internet pages nor will you be able to connect to remote servers or terminal sessions to run other apps and software that require a normal internet connection.

Continuing then: in <u>Figure 6.1</u>, this is the initial page that loads from the above link, click the "Proceed" button to continue.

The next page, <u>Figure 6.2</u>, is the sign-in page for the Juniper/Junos network connection. Remember, this will isolate your pc from your network and normal internet connections.

Once the initial sign-in is complete there is a single link (**Figure 6.3**) on the next page to click which takes you to the main submission screen shown on the next page of this guide.

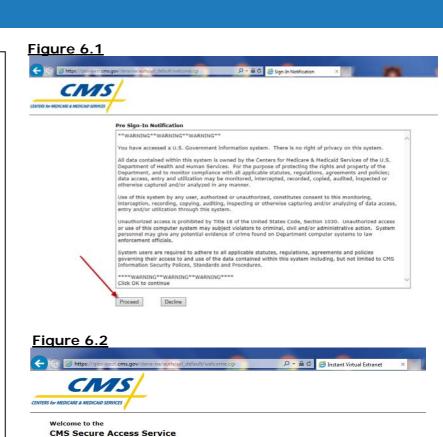


Figure 6.3 This in https://qies-west.cms.gov/dana/home/index.cgi Welcome to the Junos Pulse Secure Access Service, c811162. Web Bookmarks Copyright © 2001-2013 Juniper Networks, Inc. All rights reserved.

NOTE: If this is your first time connecting, you will need to have admin rights to https://www.qtso.com/cmsnet.html

Enter username and password you applied for, or the mds credentials for this site

PBJ - Getting Connected (continued - 2)

PBJ Guide

Getting Connected - 2

Figure 6.4 shows the main page for MDS and PBJ Submissions and Casper Reports.

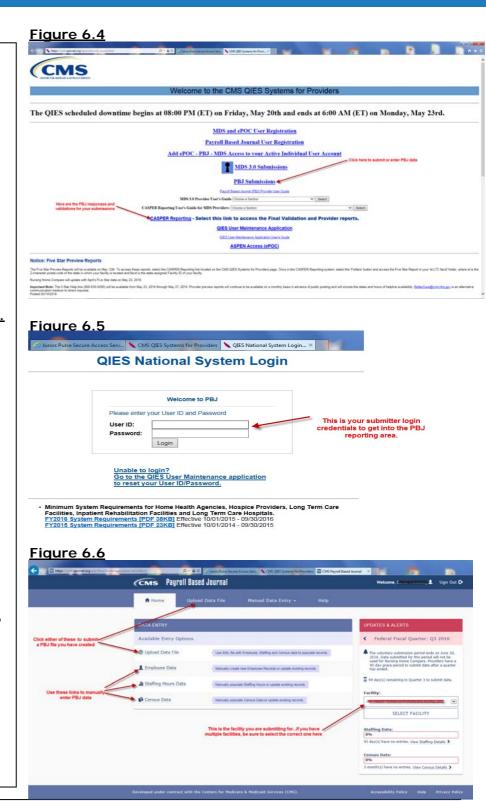
These are the links to the pages that you will need to either upload your PBJ file or key in your PBJ data...your results and validations that can be accessed through the Casper Reporting link.

After clicking the PBJ Submission link you will be asked for your PBJ submitter credentials, **Figure 6.5**, which will take you to the next page shown in **Figure 6.6**.

This is the main page for everything concerning PBJ data. You can either simply upload the file you created with Ameracare, or, key all the data in manually (yuck, don't do that).

On the right side of the page there is a selection box for the facility you are submitting for - *if you are set up to* submit for more than one facility be sure to select the correct one before going any further!

After you select the facility, and if you have a properly formatted PBJ file to upload, click on either of the two links/buttons highlighted by the red arrow in the upper left area to "Upload Data File" - then go to the next page of this guide.



PBJ - Getting Connected (continued - 3)

PBJ Guide

Getting Connected - 3

This is the next page you see after clicking on "Upload Data File".

Refer to Figure 6.7

Be careful here, you must select the correct quarterly reporting period, and as the note shows, the federal government's fiscal year starts on October 1st. This means Jan 2016 - March 2016 is actually the 2nd quarter for CMS even though it's the first quarter of the calendar year.

After selecting the correct fiscal quarter, click the "Browse" button just below it (slightly hidden on the graphic in the upper right) and a windows explorer window will pop up so you can browse to the PBJ file, select it, click open, then click the "Upload File" button on the page and it uploads. Once this is done, you have finished submitting your PBJ quarterly data file.



There is a time delay between you submitting the file and when the final feedback or validation report will be ready, so give it a few minutes and then go back to the main screen (Figure 6.4 previous screen above), then click the "Casper Reporting" link, which takes you to a screen like the one below, Figure 6.8. Follow the red arrow in the graphic and you'll see the "Folders" button. Click it and you will see any Final File Validation reports available to download and review.



PBJ - Time Clock Exports

PBJ Guide

Time clock Exports

This is the biggest source of PBJ data. Your time clock software should be able to create time sheets for employees that can be exported to a file which can then be imported into the Ameracare PBJ module and used to generate the submission file required.

The support staff at Ameracare will need to work with the payroll manager to assist in getting this file generated and a copy of the facility data so we can configure the PBJ import to match up your employees and department codes and make sure that the data imports correctly and that the department codes match and crossover correctly.

There are some considerations to keep in mind (if you don't have the payroll module or DirectPay):

- 1. Some time clock system exports won't include terminated employee's time data after the fact so it becomes a good idea to run a time sheet for termed employees immediately after they have been termed and save them until the time comes to report PBJ data to CMS.
- 2. Most facilities have contracted workers that are paid for their services but are not considered employees and are not in the time clock system. These include therapists, the facility medical director(s), pharmacy consultants, etc. This all must be reported.
- 3. Salaried employees that do not clock in will, of course, not be in the time clock...their time must be reported if they are considered direct-care or if they are required by CMS. These can include administrators, administrative assistants, etc. There are some optional employees that do not have to be reported, regardless of whether they clock in or not these include housekeeping and maintenance workers. Click this link for official details on PBJ reporting requirements: https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInits/Downloads/PBJ-Policy-Manual-Final-V21.pdf
- 3. Some contracted therapy companies are able to produce a file similar to your time clock export that Ameracare can use to import therapist's time into PBJ this is an excellent bonus because almost anything is better than manual data entry. Some of these include Casamba, Incite, and Rehab Optima...however, if your therapy company can't supply this file then you will have to key that time in manually.

Now that you have the information about CMS and the PBJ submission site, let's move on to Ameracare and the PBJ module to setup the maintenance, import data, and create the necessary file and reports.

PBJ - Settings & Maint. Department Codes

PBJ Guide

Settings & Maintenance Department Codes -1

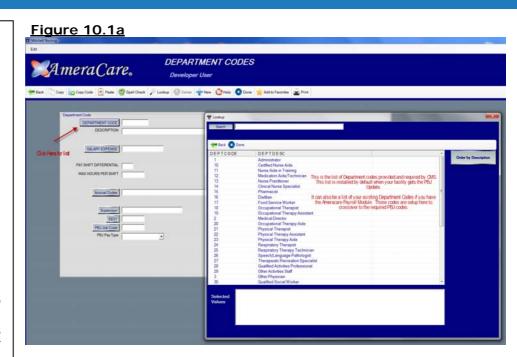
This is a one-time setup that is done initially with the PBJ installation and update and should not be changed once set unless an entry is found to be in error.

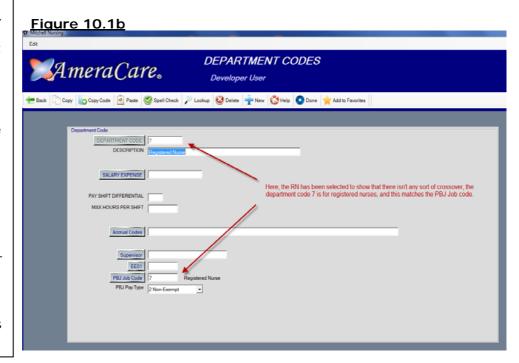
To get into the Department code setup, click on *Billing*, *PBJ System*, *PBJ Staffing Setup*, then *Setup Department Codes*.

Beginning with the basic setup pages, the Department Codes shown here in Figure 10.1a are the standard codes required by CMS for PBJ reporting. If your facility doesn't have the Ameracare payroll or General Ledger then this is the only list you will need. All reported workers will be categorized by this list of Department Codes regardless of what type of employee they are.

Figure 10.1b shows one that has been selected for review, you can see there isn't very much that has to be setup since the same Department Code selected in Ameracare matches the Department Code that CMS requires.

The Ameracare support staff will provide either this list or convert your own list of Department codes from Payroll over to the CMS-Required list if your facility already has the Payroll Module, seen on the next page of this quide.





PBJ - Settings & Maint. Department Codes

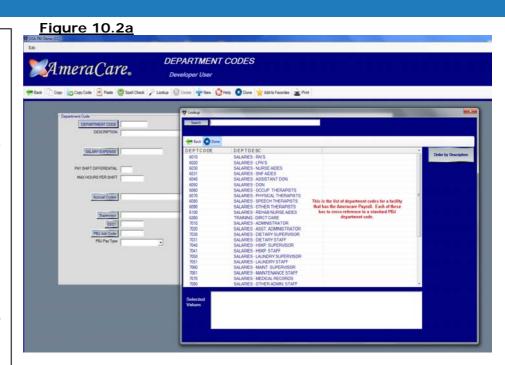
PBJ Guide

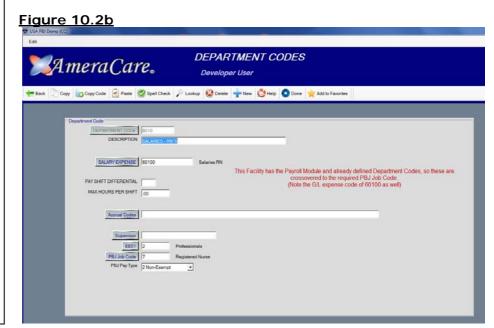
Settings & Maintenance Department Codes -2

Here on <u>Figure 10.2a</u> the converted list of department codes is shown. This matches the facility's own list of employee Department Codes in the Ameracare Payroll module and how they translate into the CMS-Required Department codes.

Figure 10.2b shows one that has been selected for review or edit. Notice how this entry also refers to the correct General Ledger account number as well as the CMS-Required PBJ Job code near the bottom.

These translations will be handled by Ameracare during the initial PBJ update and installation along with the time clock import, however, you do have the ability to edit these codes if you choose. Caution should be exercised to ensure that the employees are being reported correctly and according to the CMS specifications.





PBJ - Settings & Maint. Facility & Reports

PBJ Guide

Settings & Maintenance Facility & Report setup

Just under the **Setup Department Codes**, is **Setup PBJ Facility Info**.

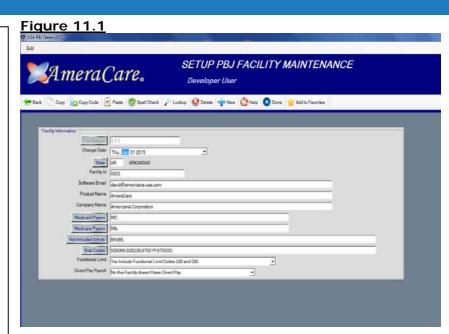
The top graphic here, <u>Figure 11.1</u>, is another maintenance page that is part of the initial setup and then, once set, doesn't have to be modified in the future unless something was entered incorrectly. Ameracare will setup this page with your facility information during the PBJ update and install but you can change it if necessary - but this should be avoided unless there is an error on the page.

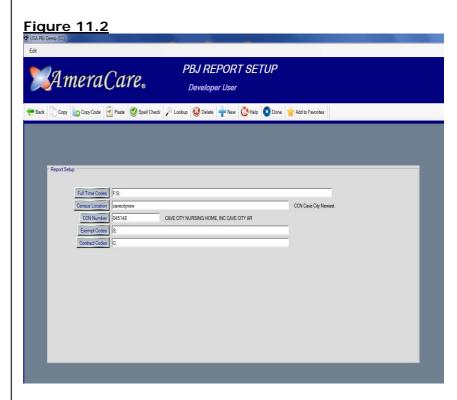
PBJ Report Setup

The next graphic, <u>Figure 11.2</u>, is of the PBJ Report setup and is also set during the installation of the update for PBJ...it too should not be changed unless there is an incorrect setting entered.

Both of these pages are used to set critical information for the PBJ reports and submission files. Changing anything on these or the previous page of this guide (department codes) can result in erroneous data being upload to CMS but you won't know there is anything wrong unless they reject the file... you'll just be sending invalid data and getting incorrect scores.

With that in mind: DON'T CHANGE ANY OF THE SETTINGS ON THESE PAGES without first contacting Ameracare unless you are absolutely certain that something has been entered incorrectly.





PBJ - Collecting Data

PBJ Guide

Collecting Data

The PBJ report and file submissions consist of the employee/workers identifying data (ID numbers) and the dates and hours they were paid to work.

It also contains census data automatically pulled from the resident census entries.

As the facility or corporate-designated PBJ coordinator it falls to you to get this information, to collect it, as it were...and to get it entered, reported, and uploaded to CMS.

The first and largest source of employee time is your time clock file, as exported from your time clock software. This needs some thought because your normal time clock export is usually set to get the time only for the current pay period. You'll need to get an export of time for the entire quarter and some timeclocks don't export this time for terminated employees as mentioned on page 9 of this guide. Generally this quarterly time report and export can be saved in your time clock software and used repeatedly. But for the termed/quit employee's you'll need to get their time sheets at the time they departed or you'll have to go back and get them later, either way. If you get them later, you'll have to print them out and enter them into Ameracare manually. Actually, printing out time sheets is the next source of time data you'll need to collect - if the quarterly time clock export doesn't have it.

Other sources of data for time will almost certainly include time sheets and reports from your therapists (or a file, if they will provide it) and a list of the salaried employees that don't clock in but must be reported. This includes your administrators, medical directors, pharmacy consultants and termed employees if you don't have them yet.

Data to Collect:

- 1. Time Clock export of the quarter being reported.
- 2. Time sheets for termed/quit employees that aren't on the above report.
- 3. List of dates and hours worked for salaried employees not in the time clock.
- 4. List of therapists dates and hours worked (get from therapy company).
- 5. List of Medical Director(s) paid hours.
- 6. List of Pharmacy Consultants time.
- 7. Census Data you can skip this if you are using Ameracare, the system will collect this for you and sort it by financial class, but this means that your census will have to up-to-date before you create the PBJ file for upload.

CMS PBJ requires ONLY the employee ID (no names, ssn, etc), the DATE they worked, and the number of hours they worked on that date, in 15 min intervals.

Also the total census days for Medicare, Medicaid, Others, listed as number of days for each month of the quarter being reported.

PBJ - Entering Data -1 Employee Setup

PBJ Guide

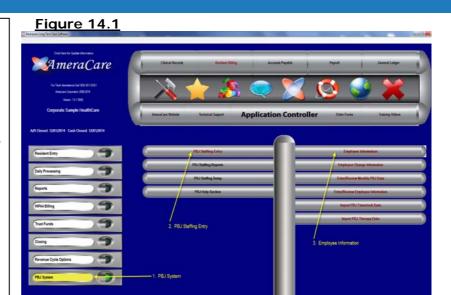
Entering Data - 1 Employee Setup

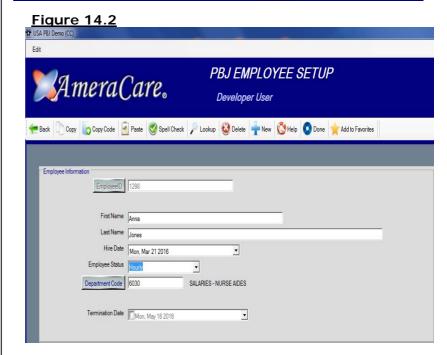
From the Billing Menu, click on PBJ System in the lower left corner, shown as "1." in Figure 14.1. Then in the middle, "2." for PBJ Staffing Entry, then on the right, "3." for Employee Information. This leads to a screen like Figure 14.2 that shows the basic PBJ information for a selected employee. This is the "PBJ Staffing Data, Employee Information" part of the data collection. The employee IDs here will be the ID used in Ameracare Payroll, or the ID/Badge number from your imported time clock file, if you have one, or they can be arbitrary ID numbers for reported workers that aren't in the time clock. Most likely it will be a combination of the three.

In <u>Figure 14.2</u> an employee has been selected to review/change/remove. There is a first and last name field but this is not reported to CMS; only the ID, Hire Date, Department Code, Status, and term date, if termed.

You can add employees here for PBJ reporting, or remove them, or edit the data for them, but this should all be done before working with the reporting hours. If you have the Payroll module then you are mostly done with this...just add the missing employees such as the administrator, assistant administrator, therapists, medical director and other salaried employees that need to be reported but aren't in the time clock or here yet in the PBJ module. If you don't have the Payroll module (or DirectPay) then Ameracare can import your time clock quarterly report but you'll have to add those just mentioned.

Once you have all required-to-report workers added here, you can begin working with any changes to the existing employees.





PBJ - Entering Data -2 Employee Changes

PBJ Guide

Entering Data - 2 Changing Employee Data

Once you have all the employees setup in the PBJ module, the next thing to do is to enter any changes since the last time you did a PBJ upload (or if this is the first time, either way). These changes need to be put in the PBJ module before collecting any time data.

On the right, <u>Figure 15.1</u>, are the menu selections to get to the *Employee Change Info*, (Labeled as 3. in the graphic) under the *Employee Information*.

Figure 15.2 shows an employee selected to edit to show what changes are necessary.

Change Date
Hourly/Salary (type or status)
Department Code
Hours per day (since switching to salary)

For this example, a nurse is being shown with her previous department code at the top, and all the fields beneath filled in as necessary to indicate all the changes to becoming the DON, at least as far as PBJ reporting is concerned.

Other changes take place in the payroll module but the changes here are for PBJ only.

Entering these changes are essential to creating an accurate PBJ submission file and should be entered for any change to an employee's status, department, or hourly rate if salaried.

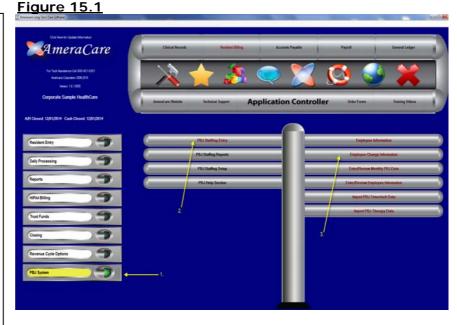
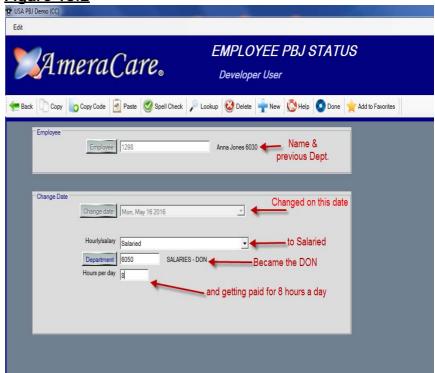


Figure 15.2



PBJ - Entering Data - 3 Import Time Clock

PBJ Guide

Entering Data - 3 Importing Time Clock

Following the menu starting with *Billing*, *PBJ System*, *PBJ Staffing Entry*, *Import PBJ time Clock Data* will take you to the screen at right, *Figure 16.1*.

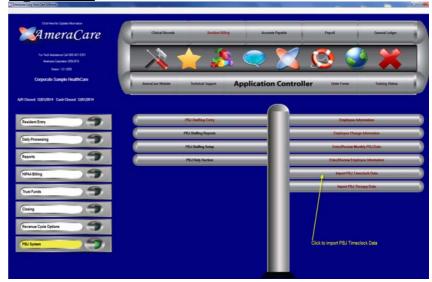
This will import the time clock file you created previously (with your time clock software by running the quarterly report/export). As noted in the graphic, you'll need to specify the location/folder and the file name of that exported report file. Then select the beginning date of that exported data. Choose the import option that matches the export format from the time clock (there are several and more on the way including: Excel CSV, Latham, Latham1, QuickBooks, and Time Force) and the bottom field is usually set to "Don't Clear Previous Entries" unless you are wanting to clear out everything and start from scratch, in which case, choose "Yes, Clear Previous Entries".

When you click the Print button the system will go out and try to find the file specified and import it according to the "Import Options". If successful this will import all the time from your time clock file into the PBJ module in Ameracare thus saving you from manually keying in 3 months of daily hours for each employee.

This is the initial and largest batch of data for PBJ but this is NOT all that which is required.

The next part is manually entering those hours not captured by the time clock, which is the next section of this guide.

Figure 16.1



Fiaure 16.2



PBJ - Entering Data - 4 Manual Entry - 1

PBJ Guide

Entering Data - 4 Manually Entering Hours - 1

This is the most tedious part of doing PBJ but we have tried to make it as easy as possible. Follow the menu to get to *Enter/Review Monthly PBJ Data* as shown in <u>Figure 17.1</u> and select it... which takes you to <u>Figure 17.2</u>.

Select the last date of the month you are entering data for, generally the first month of the quarter, but doesn't have to be. Each month is entered separately and you can come back into any month and enter any time you may have missed - at least for the quarter you are currently working on...you can't go back into a previous month that you have already uploaded to CMS unless you are planning on replacing a previous quarter with missed data.

The Employee ID button will bring up the list of employee's already in PBJ but if you are keying in data for many or most of the employees then just leave this blank. Like almost all Ameracare list selections you can leave it empty to get the most results or specify only certain entries to work on.

Proceed to the next page of this guide to see the screen for manually entering hours. You should already have imported the time clock file, added any employees not coming across from the time clock, and made any changes to employees before going into manual data entry.



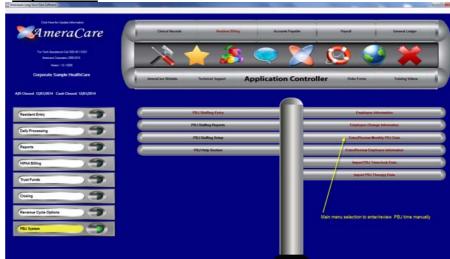
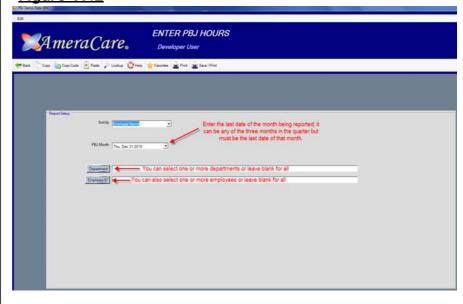


Figure 17.2



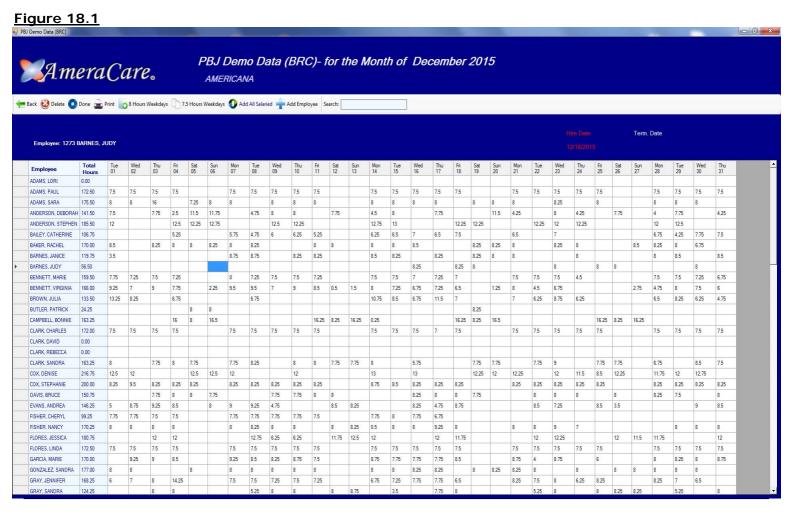
PBJ - Entering Data -5 Manual Entry - 2

PBJ Guide

Entering Data - 4 Manually Entering Hours - 2

<u>Figure 18.1</u> below is the screen to enter hours by employee ID and date. This is a "grid view" style screen that shows the month being entered and the employees to enter for. If you have imported the time clock file and entered other employees needed then they should all be on this screen. You can move around in the cells with your arrow keys, similar to a spreadsheet program, to enter the hours.

The buttons across the top are common to other screens you have seen (Back=exit without saving, Delete=delete the employee highlighted, Done=exit and save, Print=print the screen)...you can add an employee to this list by clicking the Add Employee (blue cross). The two buttons labeled "8 Hr Weekdays" and "7.5 Hours Weekdays" can set the whole month to 8 hours or 7.5 hours for the employee you have highlighted. Add All Salaried will set all the salaried employees to 8 hours for the whole month, or set them to the hours set in Employee Change Information.



PBJ - Entering Data - 6 Additional Info

PBJ Guide

Entering Data - 6
Additional Information

The preceding pages of this guide cover the time clock import, adding employees not in the time clock, manual entry of hours after importing the time clock, and any "Change" entries necessary.

Prior to generating the final report and the file to upload you can always go back and make changes or add entries provided you stick to the month you are working with. The manual times being entered for a month don't have to be in any particular monthly order since the report and file deals with the entire quarter, so if you want to enter February, then January, then March or in any other order that is fine.

The main points to keep in mind are:

- 1. Getting the full quarter of time clock data for the export by using your time clock software.
- 2. Making sure you have ALL "required" employees in the PBJ module. This includes salaried, contracted, admins, therapists, medical directors, pharmacy consultants and termed employees that worked in the quarter that you are reporting.
- 3. Adding any "Change" entries with date, status, etc.
- 4. Double checking the month you are working in BEFORE doing manual data entry.
- 5. Uploading the file to CMS within the 45 day window following the last date of the quarter you are reporting for or getting the data keyed in manually on the PBJ site within that window.

Scores are generated based on the PBJ data by comparing your census to the number of employees for a particular month which is why it is critical to include ALL employee time data, all contracted workers, etc...and your score can end up being too low if you haven't reported all the paid hours.

PBJ - Reports Monthly Report - 1

PBJ Guide

Reports Monthly Report - 1

PBJ Reports consist of a *standard report* you can view and use the information for planning and staffing needs...as well as the *quarterly report* which also creates the file to be uploaded, and the *comparison report* to analyze where your facility is by comparing to other facilities in your state.

Beginning with the standard PBJ report, follow the menu selections shown in <u>Figure 20.1</u>. This report consists of the data entered so far into the PBJ module for a given month and has selections to narrow the data pulled for the report. It does not create the upload file and is not intended as a quarterly view of your PBJ data.

Looking at the graphic to the right, <u>Figure</u> <u>20.2</u>, the options here determine the report figures, like all other Ameracare reports.

The small graphic below shows an initial "status" report indicating any changes made that the system found in conflict. For example, changing the hire date previously entered because the employee was found to have worked prior to that hire date.

Figure 20.3



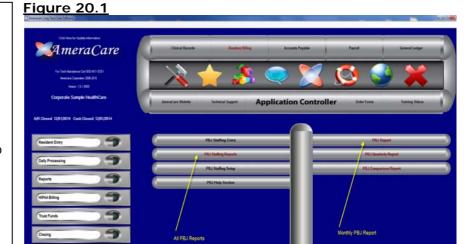
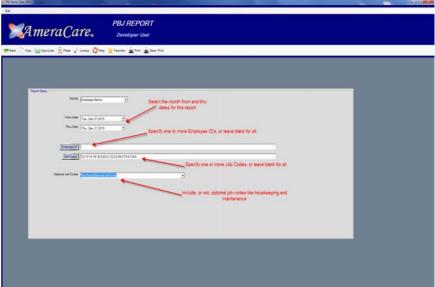


Figure 20.2



PBJ - Reports Monthly Report - 2

PBJ Guide

Reports Monthly Report - 2

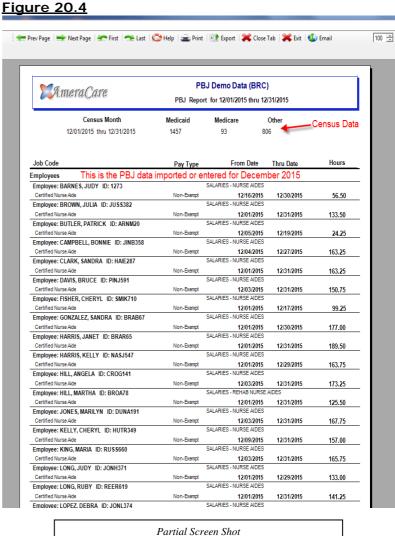
The resulting report from the previous page of this guide is shown at the right, **Figure 20.4**.

Note the Census Data is included along with the employee ID's, Dates, Job Codes, and Hours paid.

The 2nd to last page and last page have report totals based on the therapies given on the mds and the therapists time that has been keyed in to PBJ. This is the comparison between what the therapists are being paid and the amount of therapy being given to the residents as recorded on the MDS entries.

The Census data shown here is, of course, pulled from the resident census entries and categorized by the main financial classes.

This would be considered the *standard report* and is used, as previously mentioned, as a guide for totals and staffing needs. This report does NOT create the PBJ Submission File.



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PBJ - Reports Quarterly Report

PBJ Guide

Reports

Quarterly Report

Select the menu option for the PBJ Quarterly report as shown to the right in Figure 22.1

Figure 22.2 below it shows the options for the quarterly report which are almost the same for the monthly report - the notable exception being a field to specify where to save the file and what name to give it.

The report will also generate the "change" window as in <u>Figure 20.3</u>, (Page 20, bottom left), showing any correcting entries made according to the data entered.

This report will generate both a print-out you can keep for your records and review and also creates the PBJ submission file. Each time this report runs it will create the file again and overwrite the previous file created unless you change the file name or folder before running the report.

You should specify where the file is created (in what folder) and what the file is called (the file name in that folder) so you can find it when you connect to the PBJ submission site to upload it. It must be located on your local "C:" drive or you will not be able to get to it once connected to the Juniper/Junos network.

If you are satisfied that all the required hours are being reported, its time to print the report out for your records and upload the file to CMS as described earlier in this guide.



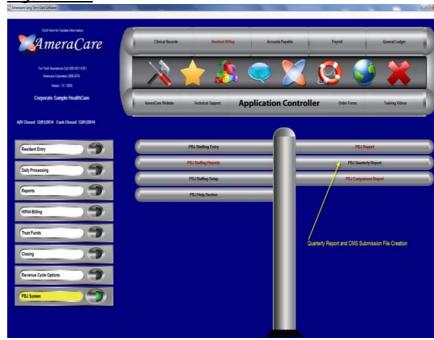
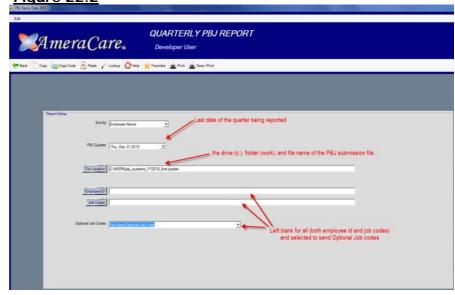


Figure 22.2



PBJ - Reports Comparison Report

PBJ Guide

Reports Comparison Report - 1

The PBJ Comparison report is a way for you to compare your facility PBJ numbers to the uploaded results of other facilities.

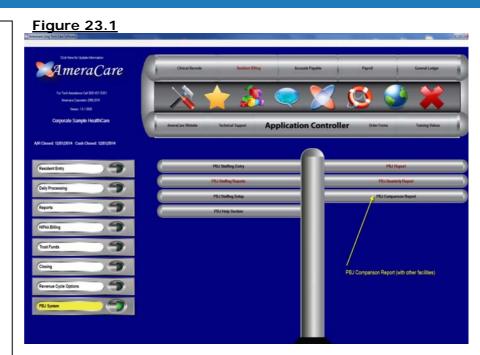
Ameracare has downloaded the quarterly data for the first two federal fiscal quarters (which is all there is so far) for you to view and use as a guide for those areas in which your facility may need improvement.

Follow the menu to the PBJ Comparison Report as shown in <u>Figure 23.1</u> and click it...this leads you to the report options page in <u>Figure 23.2</u>.

Put in the from and thru dates for the quarter you want to compare, and then select the "Comparison Month" button to choose 1 of the 2 possible batches of data that are available right now.

Choose your state, below that click the button for "Facilities" to get the list of facilities that have uploaded PBJ data so far. You can choose one or several to compare.

The resulting report is shown on the next page of this guide.





PBJ - Reports Comparison Report

PBJ Guide

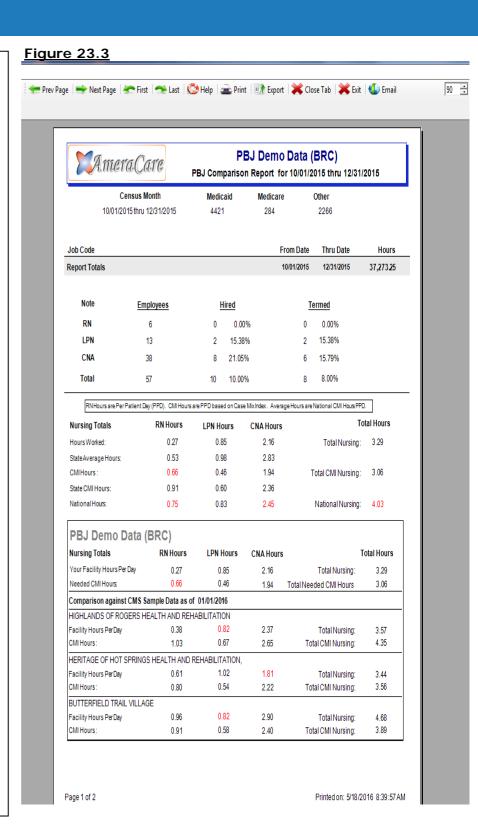
Reports Comparison Report - 2

This is the Comparison report run with the options from the previous page of this guide.

The purpose of this report, as mentioned earlier, is to compare the PBJ totals of your facility for a given quarter to other facilities in your state for the same period.

It is primarily a tool to be used to view the results of your submissions and then determine in what areas there should be some improvements...for example, does your facility have too many or not enough RN's? or LPNs? or CNA's? Are the nursing totals in line with other facilities or are they lower/higher than others? Are your CMI indexes comparing favorably with the national standard CMI index?

Study all these reports carefully, there is a lot of useful information on them that can give you an understanding of where your facility is in comparison to other facilities and what staffing needs your facility may be lacking in.



PBJ - Wrap-Up and FAQ 1

PBJ Guide

Wrap-Up

PBJ reporting is primarily for Staffing purposes to determine if your facility has the staff necessary and that they are working the hours needed.

- 1. Collect the time data from all sources including time-clock, salaried, therapists, administrator, and medical director time sheets.
- 2. Get the data entered into the PBJ module of Ameracare (import the time clock file and manually enter all the rest of the time.
- 3. Run the reports and **look them over**. If they are correct then upload the file to the PBJ site before the time limit runs out.

FAQ 1

- Q. "I think I have all the time entered but the RN hours are really low, what am I missing?"
- A. You are probably missing one or more RN time data, either it didn't come over from the time clock (assuming they are in the time clock) or not all the time data has been entered, or entered incorrectly, or perhaps one or two months haven't been entered yet, or the RN time was entered under the incorrect employee id, or they have been put into the wrong department or job code for PBJ reporting.
- Q. "The therapist's time reported is really low compared to the MDS therapy minutes given, what has gone wrong?"
- A. It could be several things: either the therapist time hasn't been entered, or the therapists have been added but are in the wrong department, or incorrect numbers for the therapists have been entered, or the MDS entries have incorrect therapy minutes entered, or the therapist company has misreported their time for paid hours or there could be an actual difference in time between what the therapy company has been paid and what they have actually given according to the mds entries.
- Q. "Our PBJ data is nowhere near the National CMI average and doesn't compare favorably with most of the facilities in my state, what do we have to do to correct this?"
- A. First, determine if your PBJ reported data is correct and complete...not missing anything and no incorrect time recorded. If everything is right then it becomes a matter of determining what areas your facility may need to improve for staffing. Perhaps your facility needs more nursing or therapy time? This is the goal of the PBJ system: to determine what a facility needs compared to what is has in terms of staffing requirements.
- Q. "Our PBJ census numbers can't be right, we only have XX beds and hardly any Medicare residents, what do I need to do to fix it?"
- A. First, it could be that the census numbers ARE correct. The census data is coming straight from the resident census entries, it is not being added manually or imported or coming from any other source. If you believe your census numbers are wrong then its time to look over your census reports and see where something may be incorrect. There really isn't any other reason for the census data to be incorrect.

PBJ - FAQ 2

PBJ Guide

FAQ 2

- Q. "I have done the PBJ quarterly report and signed into the PBJ submission site, and found the "Browse" button but I can't find the file...how can I find it?
- A. If you go back to the PBJ Quarterly report you can see the field for the File Name and whatever the entry

was when you ran the report.

This field sets the drive (should be c:) and the folder (for this example, WORK is the folder name) and the file name

(pbj_quarterly_FY2016_first_quarter) where the file will be created. When you are on the submission site and hit Browse, this is where you go to find the file. This has also been illustrated earlier in this guide with **Figure 22.2.**

If you still can't find it you might ask your MDS coordinator to help since they may be familiar with this process, or perhaps your in-house IT person can help, if you have one.

- Q. "I uploaded the file to CMS but made a mistake and picked the wrong quarter, can I upload it again?" A. Yes, the PBJ submission file is configured to "replace" the data that has already been uploaded, so if you have just over-written the Oct/Nov/Dec quarter with the PBJ data for Jan/Feb/Mar then you will have to either upload again the file for Oct/Nov/Dec if you have it, or you will have to generate it again and then upload it, then upload the correct file for the correct quarter. If you went the other way and picked the Jan/Feb/Mar quarter but uploaded data for Oct/Nov/Dec then you can do it again, just pick the correct quarter and upload the file. When the next quarter comes around your next upload will replace the data for the Jan/Feb/Mar quarter.
- Q. "I've already uploaded the file but noticed that none of the therapist hours are on the validation report, can I fix this?
- A. Yep, you can still go back into the PBJ Staffing Entry, get the therapist's time entered, create the quarterly report again which builds a new file, then upload it which will replace the incorrect data. This is a good reason to review the report and check it thoroughly before uploading...at the very least it will save you the time having to re-do it.
- Q. "I haven't uploaded the quarterly file for last year yet and don't plan to, can I still upload the first quarter for this year?"
- A. Absolutely. Right now and until June 30 2016 all PBJ reporting is voluntary, not required. You can send any quarter or not, and in any order you wish. However, beginning July 1st 2016 PBJ reporting becomes mandatory and the deadline for uploading the July/Aug/Sept quarter will be 45 days past September 30th. Once you get into the mandatory submission period you will only be able to upload for that quarter since the entire version enumeration of the PBJ reporting switches to version 2. If you create a file for a prior quarter (version 1.1.1) and select the July/Aug/Sept quarter on the PBJ site it should reject.

Remember, the federal fiscal year begins on October 1st. When you select the quarter on the PBJ site don't go by the number of the quarter, go by the months listed.