SCHOOL HEALH SERVICES PROGRAM

PROGRAM MANUAL

Appendix 5

Random Moment Time Study Coordinator Guide

TABLE OF CONTENTS

I.   INTRODUCTION

The Random Moment Time Study (RMTS) methodology allows districts to complete the time study on-line through the PCG Claiming System.

The requirements for completing the Random Moment Time Study are:

- Coordinators must complete annual training
- Participants must complete the on-line training prior to completing the RMTS form. Coordinators will distribute the Colorado RMTS Participants Guide to the participants prior to completing the on-line training
- Participants must correctly and accurately complete the RMTS form, answering all of the questions
- Coordinators must monitor employee participation ensuring that all forms are completed and returned to PCG timely

The Colorado PCG Claiming System User Guide is being provided to assist the district coordinators with navigating through the on-line Claiming System. The Claiming System User Guide will provide a detailed walk-through of the claiming system and the screens that are available for managing the program and moment notifications at the district level.

The district RMTS Coordinator is responsible for routinely accessing the PCG Claiming System website: https://claimingsystem.pcgus.com/co The Claiming System is available 24 hours a day / 7 days per week and can be accessed at any time, outside of scheduled maintenance windows, by using the website which allows the district RMTS Coordinator to edit and monitor their Staff Pool List (SPL) list and manage shifts and calendar(s). The RMTS help desk is also available at 1-866-766-9015.

This User Guide will provide the following details related to district coordinator roles and responsibilities:

- How to access the PCG Claiming System website
- How to create shifts (work schedules/hours)
- How to update and certify calendars
- How to edit, submit, and certify the Staff Pool List (SPL)
- How to access reports used to help manage program compliance
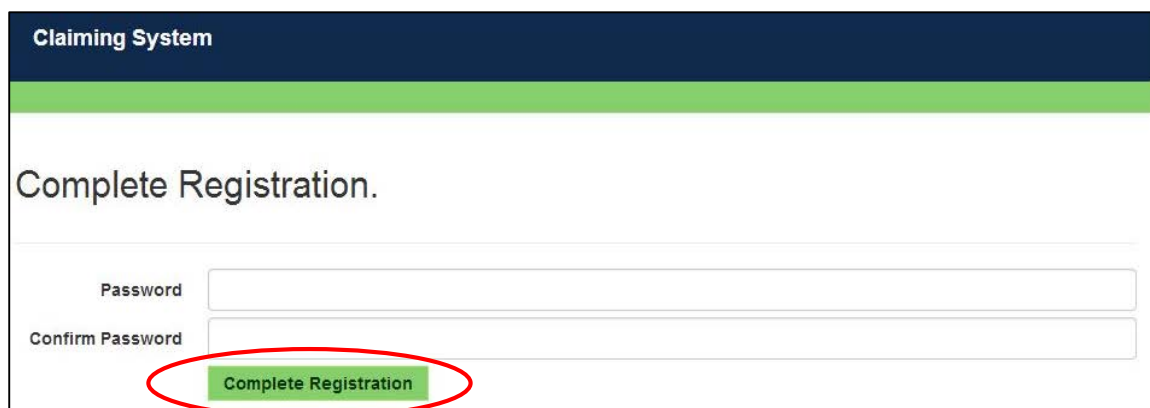
II.   ACCESSING THE PCG CLAIMING SYSTEM

FIRST TIME REGISTRARTION FOR SYSTEM USERS

Once users (district coordinators) are added to the PCG Claiming system they will receive an email with the subject 'New Account Registration' from a claimingsystem@pcgus.com email address.

First time users need to click the web link in the email and will then be brought to the page below to enter their password in the 'Password' and 'Confirm Password' fields.

Users then click the 'Complete Registration' button and they will be brought back to the main page to enter the email and new password to log into the site.

RESETTING PASSWORDS

User passwords will never expire but they can be reset as needed. If a district coordinator needs a new password, or has forgotten their login information, simply click on the 'Forgot Password' link located next to 'Log in'.

Next enter the email address that is associated with the system along with the text that is displayed in the image field and then click the 'Forgot Password' button.

The user will then be sent an email with the subject 'Reset Password Request' from a claimingsystem@pcgus.com email address. The email will contain a link to the page below for users to reset their password.

Lastly, enter the new password in the 'Password' and 'Confirm Password' fields and click the 'Reset Password' button. The user will then be brought back to the main page to enter the email and new password and log into the site.

REGISTERED USER LOGIN

To enter the PCG Claiming System website after registering, a coordinator will open an Internet browser and enter https://claimingsystem.pcgus.com/co.

Enter email and password. Be sure to enter password exactly as created, using appropriate letter cases and symbols.

III. UTILIZING THE NAVIGATION BAR ON THE HOME SCREEN/DASHBOARD

Below is the home screen available after logging into the website. The home screen contains links to all of the functionality within the system, including the navigation bar links:

- Users
- Staff Pool
- Calendar
- Moments
- Configuration
- Reports
- About

Use the links to each of the sections to navigate through the system. The links are circled in red below. The home screen also contains data resources that will display information regarding quarterly milestone summaries, moment status, and resources uploaded by PCG. Click on the 'Home' link at any time to return to the home screen shown below. After selecting your desired quarter from the dropdown, it will remain your default throughout your site navigation (including summer quarters).
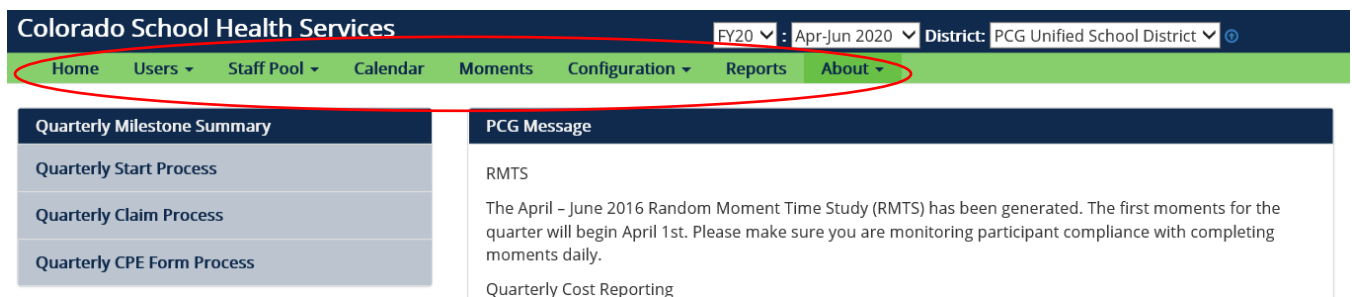
STAFF POOL

The 'People' dropdown is where district coordinators will be able to edit the Staff Pool List (SPL) by selecting 'Staff Pool Positions' from the dropdown menu (see section VII)

If a district coordinator requires that a system user be added to the system they must contact PCG. Examples of these users:

- *All Users* - District RMTS Coordinator, Medicaid Specialist, District Financial Reporter, etc...
- *Staff Pool Positions* – Participants that are routinely performing Medicaid school health services prescribed in an Individualized Education Program (IEP) or Individualized Family Services Plan (IFSP), other medical plans of care and administrative activities that support Medicaid school health services.
- Direct Support Positions – Not applicable
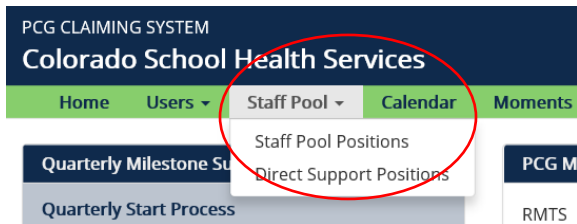
CALENDAR

The 'Calendar' section is where district coordinators update their district's calendar information (see section V).
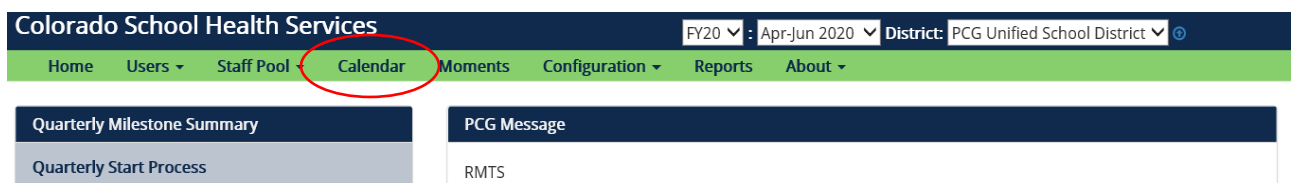
MOMENTS

The 'Moments' section is where all sampled moments that have already occurred and upcoming moments that are within twenty-four (24) hours of the sampled moment can be found (see section X)

CONFIGURATION

The 'Configuration' dropdown is where district coordinators will update their shifts (see section VI).
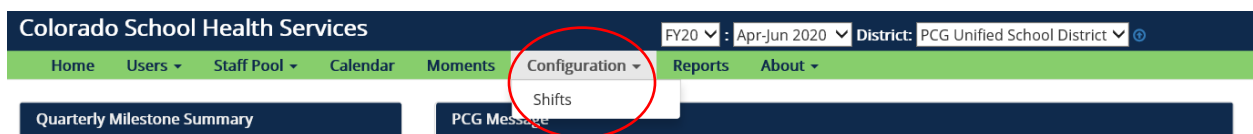
REPORTS

The 'Reports' dropdown is where district coordinators can view various district specific reports (see section IX)

IV. UTILIZING QUARTERLY MILESONE SUMMARY ON THE HOME SCREEN/DASHBOARD

The image below highlights the locations of the following dashboard features:

- **'The Quarterly Milestone Summary'** on the left of the Home screen displays where the status of the claiming process is for each quarter. District coordinators are only responsible for tasks that are light blue. The percentage bar is a real time status of progress towards completion of each milestone in process.
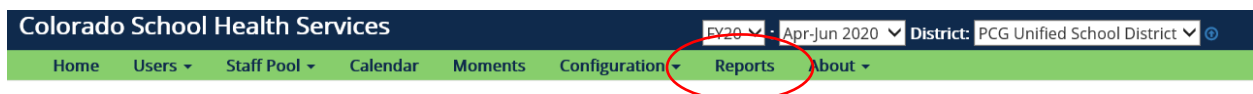- **'PCG Message'** is where PCG staff will post important information such as specific training dates, staff pool list due dates, etc.
- **'Moment Compliance'** feature allows district coordinators to track the number of total moments that went out and how many have been completed throughout a given RMTS quarter by cost pool.
- **'Resources'** field is where PCG will post training guides and other important resources.
- **'Reports'** feature allows district coordinators to download different spreadsheets depending on the information needed. (Please see graphic on next page)
  - Active Participants- Displays all district participants who are active at the time of running the report
  - SPL History- Displays the finalized snap shot of the district's time study participant staff pool list from which the sample was drawn for a particular quarter
  - Compliance Reports- Displays the completion status for all district moments and corresponding participants in a quarter
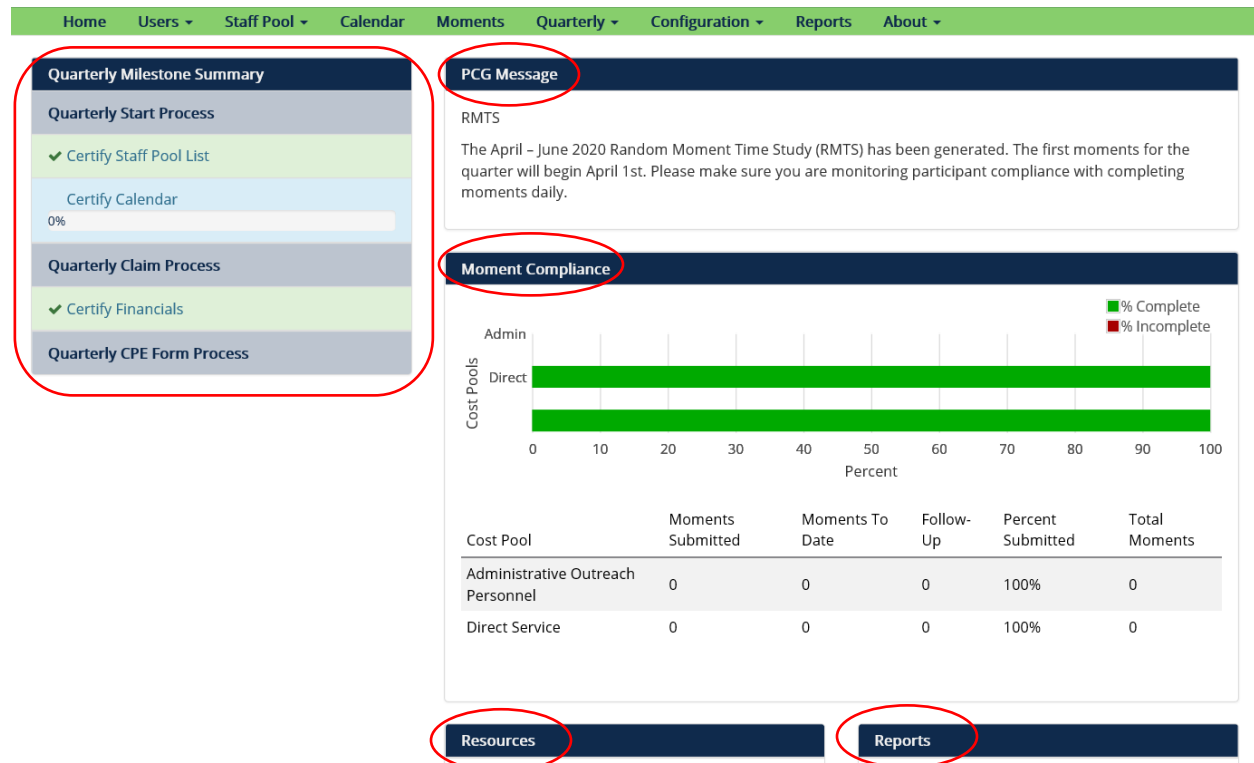
V.   CALENDAR COMPLETION

District coordinators enter their non-work days directly into the PCG Claiming system to help prevent staff from being selected for a moment on days that they do not work. **Each district must have a certified calendar in order for the non-working days to be excluded from being selected for moments.**

TO ENTER DAYS OFF
1.   Click the 'Calendar' link at the top of the home page.
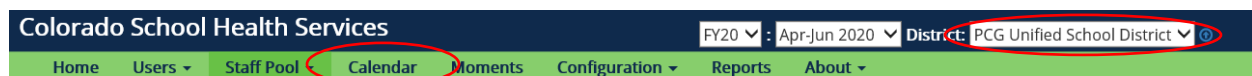
Holiday/Non-Work Day is the only selection that indicates non-work days for staff. Select Holiday/Non-Work Day and then click on the days on the calendar that correspond to the days off for the district. The box will turn red to indicate that the selected day is a Holiday/Non-Work Day. If a day is selected in error, simply click it again to unselect.

Click 'Save Changes' to lock in the non-work days, review days selected according to approved school calendar, then click 'certify calendar'. Contact PCG to make changes to the calendar if certification is selected prematurely and changes need to be made. Only PCG can unlock a district calendar.

Once a calendar is certified, it locks and only the 'Unplanned Closure' selection will be displayed. 'Unplanned Closure' is a universal term and is an option for the district coordinator to use for an

<u>unexpected</u> school closing due to a non-scheduled school closure that affects attendance <u>such as weather-related issue, water main break, or another unplanned emergency situation.</u>

VI.   ENTERING SHIFTS (WORK SCHEDULES/HOURS)

Not every participant on the SPL begins and ends their workday at the same time. The creation of 'shifts' in the Claiming System allows for differences in schedules per district or school to be created to capture the base work schedule for each participant. The creation and assigning of shifts to participants increases the likelihood of that participant being selecting during a minute in which they are scheduled to work. A coordinator can create multiple shifts for staff that have set schedules. Shifts are not meant to capture each participant's exact schedule, but rather the base work schedule/shift that best fits their typical work week. At a minimum, a district must have at least one full time shift that encompasses work time that can be assigned to all employees.

TO CREATE SHIFTS (WORK SCHEDULES/HOURS):
1. Go to the 'Configuration' drop down on the home screen and select 'Shifts.'
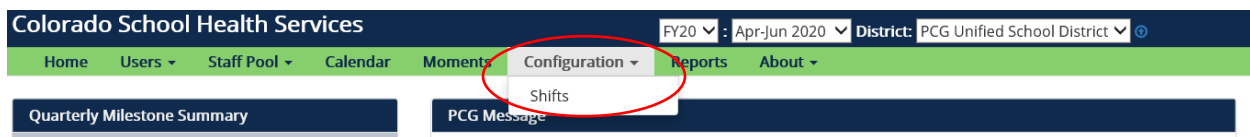
2. Click on 'Add New Shift.'

(5 Shifts)

3. Type in a Name for the shift being created. Naming conventions should be easy to identify and meaningful so that a correct shift can be selected for a staff person. If there are multiple schools within the district, each school can have a specific shift with a start time and duration.

Naming convention examples:
- M-F 8AM-12PM
- T, W, TH 8AM-3PM
- Part Time W, TH, F 9AM-1PM, Nurses
- Full Time HS 8AM-3:30PM

4. The 'position' indicates the order you want your shifts to appear in the drop down for your staff pool positions.

5. Choose the day of the week for each shift from the drop down. Each day must be added to the shift separately. If the shift is 2 or more days, steps 5-7 will be repeated until the complete shift has been identified.

6. Enter the starting time in either of the following formats:

- 8:00 AM/PM; or
- 13:00 (military time = 1:00 PM)

7. Enter the end time in either of the following formats:

   o 8:00 AM/PM; or

8. 13:00 (military time = 1:00 PM) Repeat steps 5 – 7 for each of the days associated with the shift and click 'Create New Shift' to save it in the system.

9. The shift will then be saved in the system and can be assigned to job positions.

TO EDIT EXISTING SHIFTS

Once a shift has been created within the system it can be edited any time prior to SPL certification and sample generation.

1. Go to the 'Configuration' drop down on the home screen and select 'Shift.'
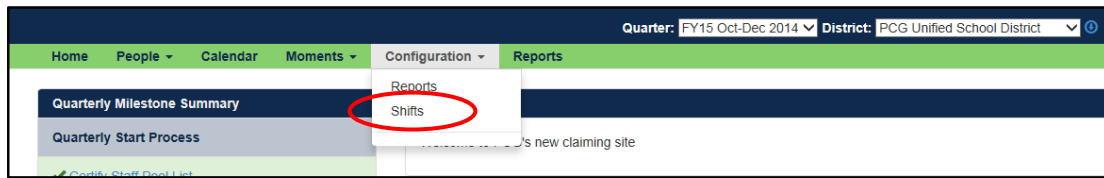
2. Select the shift that you would like to edit by clicking on the blue hyperlink under the Shift column.

3. Make required changes to the established shift's name, position, start or end by replacing the existing text. To delete the day of the week from the shift click on the red 'X' on the corresponding row of the day of the week you would like to remove from the shift.

4. Once all changes have been made, click on 'Save Changes' to make changes effective.

TO INACTIVATE EXISTING SHIFTS

Once a shift has been created within the system it can be inactivated any time prior to SPL certification and sample generation.

1. Go to the 'Configuration' drop down on the home screen and select 'Shift.'
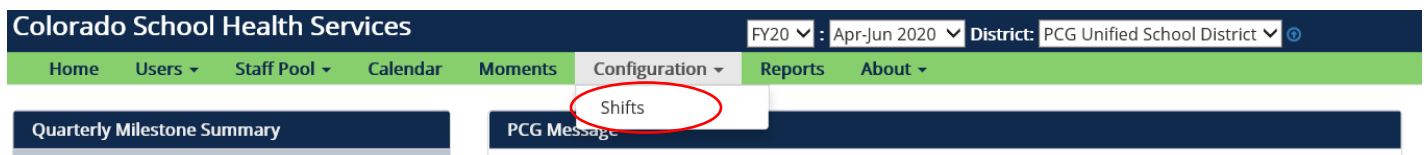
2. Select the shift that you would like to edit by clicking on the blue hyperlink under the Shift column.

3. Select the 'Inactive' text box to inactivate the shift.

4. Click on 'Save Changes' to make the inactivation effective.

A shift can be re-activated at any time by selecting the inactivated shift (click on the blue hyperlink under the Shift column) that you would like to re-activate, unselecting the 'Inactivate' text box, and saving changes.

VII.   CREATING AND UPDATING THE STAFF POOL LIST

It is important for districts to have an accurate SPL, as the information will be used to include the costs associated with the staff on this list for the quarterly MAC claim. Districts coordinators update their SPL once per quarter using the web based PCG Claiming System.

All districts participating in RMTS must complete the certification process to have their SPL included in the sample. SPLs that have not been certified will not be included in the sample and those districts will not be considered as participating during the quarter. In order to meet program requirements, each district must submit a SPL including the direct service cost pool for each quarter.

Once the SPL has been certified it is locked and only changes to email addresses can be made in the system. If additional updates and /or changes are needed, the district coordinator must contact PCG to request to have the SPL unlocked to make any additional updates/changes. If the SPL is unlocked, the district coordinator must complete the certification process again.

Once the quarterly sample has been generated, updates to participant email addresses and name corrections can be made and will take effect immediately. Any changes in status, or the addition of new participants, will not affect the sample for the current quarter once the sample has been generated. These changes will be reflected in future quarter's samples.

The SPL consists of three cost pools. The Direct Service, and Administrative Outreach Personnel Cost Pool.

Cost Pool 1 – Direct Service – Cost Pool 1 is comprised of direct service staff who are routinely performing school health services as prescribed in an IEP,IFSP or other medical plans of care. Also, staff who are performing administrative claiming activities that include administrative and outreach activities to students and/or their families. Cost pool 1 will also include the respective costs for these staff. These costs include staff time spent on billing activities related to direct services. Examples of staff in cost pool 1 include but are not limited to:

- Applied Behavioral Analyst
- Audiologist
- Health Technician
- Licensed Counselor
- Nurse Aide
- Nurse Practitioner
- Nurse, LPN
- Nurse, RN
- Occupational Therapist
- Occupational Therapy Assistant (Technician)
- Personal Care Aide/Teacher's Aide
- Physical Therapist
- Physical Therapy Assistant (Technician)
- Physician
- Psychiatrist
- Psychologist
- School Psychologist
- Social Worker
- Speech/Language Pathologist
- Speech/Language Pathologist Assistant
- Speech/Language Pathologist candidate
- Supervised Audiology Candidate
- Speech/Language Impairment Teacher

Cost Pool 2 – Administrative Outreach Personnel – Cost Pool 3 is comprised of staff who are routinely performing administrative claiming activities that include administrative and outreach activities to students and/or their families. Cost pool 3 will also include the respective costs for these staff. These costs include staff time spent performing administrative and outreach activities that support allowable Medicaid administrative activities on a regular basis. Examples of staff included in cost pool 3 include:

- Administrator
- Interpreter
- Interpreter Assistant
- Program Specialist
- Psychologist Intern
- Pupil Support Services Administrator
- Non-licensed Orientation & Mobility Specialist
- Non-licensed Psychologist

- Non-licensed Social Worker
- Nurses – Non DS
- School Bilingual Assistant
- School Counselor
- Special Education Administrator
-
- Special Education Teacher – non DS

Important notes regarding adding staff onto the Staff Pool List: Consider each staff member and their job duties individually. Staff should conduct reimbursable activities on a regular basis or a regular part of their job. The district coordinator should verify that each participant meets the criteria prior to adding to the SPL. It is imperative that the participants are placed in the correct Cost Pool and Job Category based on their actual job title within the district.

NOTES ON THE TIME STUDY PARTICIPANT LIST
- SPL must be submitted and certified in the PCG Claiming System on a quarterly basis
- A staff member can only be included in <u>one</u> cost pool
- Cost pools are mutually exclusive
- Do not include any participants who are 100% federally funded
- Districts can only claim costs for participants for the quarters the participant is on the SPL
- Staff must be included on the SPL for costs to be included in quarterly MAC claim
- Each staff person should be considered individually for the SPL - job title alone does not automatically qualify a staff person for the program

Once district coordinators have decided who to include on their SPL, utilize the PCG Claiming System site to create, update and submit this list. The following sections will explain how to access the site, edit, submit, and certify the SPL.

VIEW, CREATE, AND/OR UPDATE THE STAFF POOL LIST
To view, create, and/or update the SPL, click on the 'Staff Pool' link on the home screen and select 'Staff Pool Positions.' The two main components of the 'Staff Pool Positions' page are the 'Add New Job Position' and 'Certify Staff Pool' buttons. The 'Add New Job Position' button is how users can add new job positions to their staff pool list. The 'Certify Staff Pool' button is the button that users click to certify and lock their staff pool in the Claiming System.
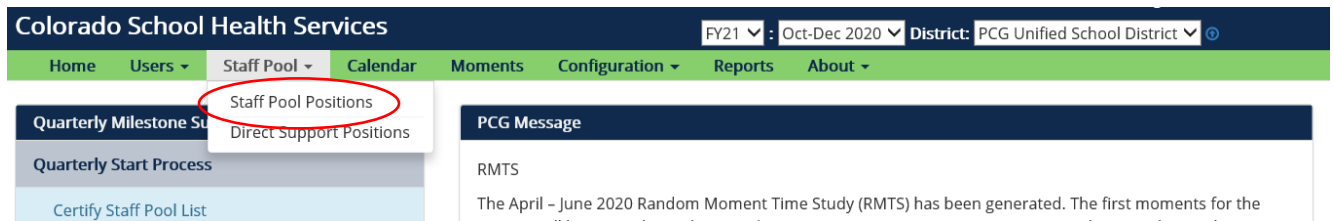
Click on the 'Staff Pool Positions' link on the 'Staff Pool' dropdown. All current active job positions included in the staff pool list will appear with the following information:

- Cost Pool (Direct Services Providers or Administrative Personnel Providers)
- Location
- Full Name
- Job Category
- Job Title
- Email

FILTERING THE STAFF POOL LIST

It is possible to filter the SPL by clicking 'Available Filters.'

Select the desired cost pool, job category, email, first name, or last name, either individually or in combination with each other. Once the desired criteria has been selected, click 'Filter' to display the results for all participants. To review the SPL in its entirety, leave all the search fields blank and select 'Filter'. The staff members that meet the search criteria selected will be displayed.

ADDING A NEW JOB POSITION

1. From the 'Staff Pool Positions' screen, click on the 'Add New Job Position' button located on the upper left of the screen to add a new Job Position. The job position is created first and then a staff person assigned to it.

2. The required fields below will appear:

- Location: PCG Unified School District
- Cost Pool: A drop down menu with the cost pools allowed
- Job Category: A drop down menu with job categories allowed in that cost pool
- Shift Type: A drop down menu with all shifts (work schedules) listed that were created by the coordinator
- Job Title: Job title used by the district to describe the position

3. Enter the required information and then select the action. When adding a new staff person, select the action, 'Fill With New' from the drop down. *Do not select the 'Create as Vacancy' option as vacancies are not allowed in the RMTS sample.*

Action:	Fill With Existing
	Fill With New
	Create as Vacancy

4. Complete the new participant information by entering the following informatin in the fields below (the system will highlight the required fields with red font):

- Start Date – This should be the first day of the first RMTS quarter the participant is being included on the SPL unless they are a replacing another participant in the middle of the quarter in which case it will be the start date of employment
- Employment Type: A drop down menu to select District Payroll or Contracted
- Email – Unique email address for all participants
- Employee ID – district issued employee ID, no SSNs
- First Name – Full first name
- Middle Name - This is an optional field
- Last Name – Full last name
- Suffix – this is an optional field
- Phone – This field is optional but recommended
- Email CC Person - Select from the dropdown the contact that will receive this participant's RMTS late notifications

| Create new staff: | |
Start Date: @	10/01/2020
End Date: @	mm/dd/yyyy
Employment Type:	▼
	(Required)
Email:	
	(Required)
	☐ No Email
Employee ID: @	
First Name:	
	(Required)
Middle Name:	
Last Name:	
	(Required)
Suffix:	
Phone:	
Email CC Person:	▼

5. Click 'Create New Job Position' or cancel to abort new job position and return to the SPL

FILLING A NEW POSITION WITH AN EXISTING STAFF

If a participant has been employed by your district previously and has been rehired, or has participated in the time study but is not currently included on the SPL, you can create a new position and fill it with their previously entered information.

1. From the 'Staff Pool Positions' screen, click on the 'Add New Job Position' button located on the upper left of the screen to add a new Job Position. The job position is created first and then a staff person assigned to it.
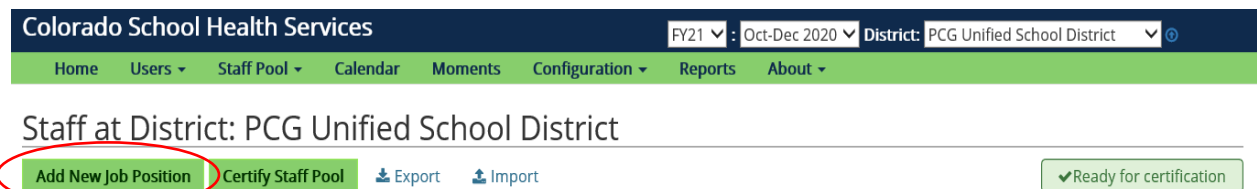
2. The required fields below will appear:

- Cost Pool: A drop down menu with the cost pools allowed
- Job Category: A drop down menu with job categories allowed in that cost pool
- Shift Type: A drop down menu with all shifts listed created by the coordinator
- Employment Type: A drop down menu to select Salaried or Contracted
- Job Title: Job title used by the district to describe the position

3. Enter the required information and then select the action. When selecting existing staff, select the action 'Fill With Existing'. Note: Only staff that are <u>inactive</u> and not assigned to another position can be selected to fill a position. If changing a participant from one

cost pool to another, delete the position in the current cost pool, then add a position in the correct cost pool and select 'Fill With Existing' to choose the existing information.

Action:	Fill With Existing
	Fill With New
	Create as Vacancy

4. Search for the staff person by entering specific criteria in the search fields

Search for staff:

Email:	
Employee ID:	
First Name:	
Last Name:	

Search

All staff, both inactive and active, will appear in the search results based on the criteria selected. 'Yes' under the column header 'Inactive' means the participant is inactive and can be selected to fill the position. 'No' in the 'Inactive' column means the staff is active in the district. Only a participant that is not assigned to a current position (having a yes in the column, 'inactive') can be selected. Select the Back button to redo search criteria or to return to the adding participant screen.

5. Click the 'Fill' button once the desired staff is located to populate the job position.

Search results:

Location	Email	Employee ID	Name	Inactive	Fill
	2386@test.com		Losier, Amy	Yes	Fill

Back

- Enter the start date that the existing staff person is beginning the new position. The system will default to the first day of the quarter.

Fill with staff:

Employment Type:	[▼]
	(Required)
Start Date: ❓	10/01/2020
End Date: ❓	mm/dd/yyyy
Email:	2386@test.com
Employee ID:	
Name:	Losier, Amy
Email CC Person:	(none)

☐ Add Another?   Cancel   Create New Job Position

6. Then select 'Create New Job Position' to save it.

DELETING A STAFF PERSON AND A POSITION

SPL's are updated quarterly. If a participant is no longer employed within the district or should no longer be included on the SPL for the upcoming quarter, they should be removed, or 'deleted' from the SPL.

1. Select the staff person and position to delete.

Certified	Location	Cost Pool	Email	Emp Id	Name ⌃	Job Category	Job Title
✓	District Wide	Direct			(Vacancy) (Arnold, Kevin)	Physical Therapist	PT
✓	District Wide	Direct			(Vacancy) (Roost, Robin)	Occupational Therapist	
✓	High School	Direct			(Vacancy) (Bush, Brenda)	Special Education Teacher	
✓	Demo Elementary	Admin	awayne@test.com	1234321	Arnold, Wayne	Non-licensed Social Worker	
✓	High School	Direct	cbing@test.com	12345678	Bing, Chandler	Personal Care Aide/Teacher's Aide	

2. Scroll to the 'Action' drop down box to make a selection:
a. Vacate
b. Replace with Existing
c. Replace with New
d. Edit
e. Change Employment Type
f. Delete

Edit Job Position 20 / 21

Location:	Demo Elementary
Cost Pool:	Administrative Outreach Personnel
Job Category:	Non-licensed Social Worker
Shift Type:	M-Th 7:30 - 4:00*
Job Title:	
Description:	

Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll	1234321	awayne@test.com	Arnold, Wayne	04/01/2017		✖

Action: Delete

Warning! By continuing with this action you'll delete the position. If your intention is to vacate or perform a replacement, then please select another option from the dropdown. By deleting this position, the position will not be included in the sample and the position will not be eligible for replacements.

End Date for Arnold, Wayne: ❓ 09/30/2020

☐ **Are you sure you want to delete this position?**

☐ Edit Another?   Cancel   Save Changes

3. The 'End Date' entered should be the participants exact end date in the quarter in which the update is being made in. After the end date has been entered, confirm that you would like to delete the participant from the SPL list by clicking on the box labeled 'Are you sure you want to delete this position?'

4. Then click on the 'Are you sure you want to delete this position' and then select 'Save Changes' button to delete the participant from the current list.

Edit Job Position 20 / 21

Location:	Demo Elementary
Cost Pool:	Administrative Outreach Personnel
Job Category:	Non-licensed Social Worker
Shift Type:	M-Th 7:30 - 4:00*
Job Title:	
Description:	

Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll	1234321	awayne@test.com	Arnold, Wayne	04/01/2017		✖

Action: Delete

Warning! By continuing with this action you'll delete the position. If your intention is to vacate or perform a replacement, then please select another option from the dropdown. By deleting this position, the position will not be included in the sample and the position will not be eligible for replacements.

End Date for Arnold, Wayne: ❓ 09/30/2020

☐ Are you sure you want to delete this position?

◀ ▶   ☐ Edit Another?   Cancel   Save Changes

REACTIVATING A JOB POSITION
If a participant returns to the district that was at one time inactivated, the district coordinator will need to create a new job position but can fill with existing data. This is the same process as the 'Adding a New Job Position' with existing data process that was described earlier in this guide.

ALLOWABLE ACTIONS DURING A QUARTAER
Once the quarter has begun, the 'Action' drop down menu (available once a participant is selected) allows users to replace the participant with another staff (existing or new) during the quarter. This will allow users to track specific dates that participants were in the position for financial claiming and allow new participants to be notified of moments that occurred while they are in the position.

REPLACING A STAFF PERSON
1. Select the link on the name of the staff person to replace.

2. Scroll to the Action drop down box to select:

    a. Vacate
    b. Replace with Existing
    c. Replace with New
    d. Edit **(Will be available in the drop down, but not applicable to complete for this action)**
    e. Delete **(Will be available in the drop down, but not applicable to complete for this action)**

a. Vacate

Use this if a staff person has left a position and there is no replacement staff. This feature can be used during the quarter **but should not be used at the beginning of a quarter** since vacant positions are not allowed. If you have an employee who is no longer with the district, or is no longer appropriate to be included on the SPL, they should be deleted. Enter the date the staff person vacated the position. Click the check box indicating assurance of creating a vacancy and select 'Save Changes'.

Action:	Vacate	⌄
End Date:	10/25/2014 ✕	
	☐ Are you sure you want to create a vacancy for this position?	

b. Replace with Existing

Search for the staff person by entering specific criteria in the search fields

Search for staff:

Email:	
Employee ID:	
First Name:	
Last Name:	
	Search

All staff, both inactive and active, will appear in the search results based on the criteria selected. 'Yes' under the column header 'inactive' means the participant is inactive and can be selected to fill the position. 'No' in the 'inactive' column means the staff is active in the district. Only a participant that is not assigned to a current position (having a yes in the column, 'inactive') can be selected. Select the Back button to redo search criteria or to return to the adding participant screen.

Search results:

Location	Email	Employee ID	Name	Inactive	Fill
Demo LEA	lskywalker@123pcgus.com		Skywalker, Luke	No	Fill
Demo LEA		krogers99	Rogers, Kenny	No	Fill
Demo LEA	ndrew@123pcgus.com		Drew, Nancy	No	Fill
Demo LEA	plong@123pcgus.com		Long, Pippi	No	Fill
	dkellog@123pcgus.com		Kellog, Denny	Yes	Fill

Back

Click the 'Fill' button once the desired staff is located to populate the job position. Enter the start date that the existing staff person is beginning the new position. The system will default to the first day of the quarter. Then select 'Save Changes' to save it.

c. Replace with New

Complete the new staff person information by entering:

- End Date – This is the end date of the person you are replacing
- Start Date – This should be the first day of the first RMTS quarter the partcipant is being included on the SPL unless they are a replacing another participant in the middle of the quarter in which case it will be the start date of employment
- Employment Type – District Payroll or Contracted

- Email address – Required so that the replacement can receive moment notifications
- Employee ID – district issued employee ID, no SSN's
- First Name – Full first name
- Middle Name – This is an optional field
- Last Name – Full last name
- Suffix – this is an optional field
- Phone – This field is optional but recommended
- Email CC person - Select from the dropdown the contact that will receive this participant's RMTS late notifications

Create new staff:

End Date for Hobbs, Miranda: ❷	03/31/2020
Start Date: ❷	04/01/2020
End Date: ❷	mm/dd/yyyy
Employment Type:	⌄
	(Required)
Email:	
	(Required)
	☐ No Email
Employee ID: ❷	
First Name:	
	(Required)
Middle Name:	
Last Name:	
	(Required)
Suffix:	
Phone:	
Email CC Person:	⌄

Click 'Create New Job Position' or cancel to abort new job position and return to the SPL

Cancel   **Create New Job Position**

EDITING A STAFF PERSON

If information needs to be updated for a staff person, such as email address, name, or job title, follow the following steps:

1. From the 'Staff Pool Positions' screen, job position information may be edited by selecting the link on the desired participant's name

2. The selected participant position's information will appear and can be edited.

3. Make all necessary modifications to the individual job position's screen by clicking in the text boxes or by using the drop down menus. Users are able to make updates to the job position's Job Category, Shift Type, Employment Type, Job Title, email address, employee ID, Name and cc person in this section. *Changes to shift type will not be reflected until the next quarter's RMTS sample if the current quarter has already been generated.*

Create New Job Position

Location: [▾]
(Required)

Cost Pool: [▾]
(Required)

Job Category: [▾]
(Required)

Shift Type: [▾]
(Required)

Job Title: [   ]

Description: [   ]

Action: [▾]

Create new staff:

Start Date: ❓ [10/01/2020]

End Date: ❓ [mm/dd/yyyy]

Employment Type: [▾]
(Required)

Email: [   ]
(Required)

☐ No Email

Employee ID: ❓ [   ]

First Name: [   ]
(Required)

Middle Name: [   ]

Last Name: [   ]
(Required)

Suffix: [   ]

Phone: [   ]

Email CC Person: [▾]

☐ Add Another?   [Cancel] [Create New Job Position]
(No changes on page)

4. Once all the necessary changes have been made, click the 'Save Changes' button at the bottom of the screen to save the updated information.

EXPORTING AND IMPORTING THE STAFF POOL LIST

Another option for making SPL updates is using the '**Export**' feature. This feature allows you to use Excel to make changes/updates and import the list. **The only changes that can be made to the SPL using the export/import feature is to ADD new participants or DELETE/INACTIVATE participants**. Edits to participant data must be made manually in the system from the Staff Pool Positions screen. Complete the following steps to export the SPL:

1. Click on the link at the top of the 'Staff Pool Positions' screen to export the Staff Pool List

2. The Excel workbook file name cannot be changed and it must be saved as an **Excel file.** The worksheet in the Excel export must remain titled **splexport**. Any other title will prevent the SPL workbook from loading into the RMTS system

3. The Excel export may have a blank in the Employment Status field. Please make sure this field contains one of the following prior to importing:

    a. District Payroll
    b. Contracted

4. To add a new participant, enter all of the necessary information into the cells of a blank row in the Excel export file. The following fields are required:

    a. Cost Pool Name – (Direct Service, TCM, and Administrative Personnel)
    b. Agency Name – Enter the full school name
    c. Parent Agency Name – Enter the full district name
    d. Job Span Id – System generated
    e. Job Position Id – System generated
    f. Job Category Name – Enter one of the RMTS job from the list on pages 16-17 of this guide exactly how it is listed (maintain all of the same capitals, punctuation, and characters if applicable)
    g. Job Title – Official district job title for the participant
    h. Description – Optional field
    i. Shift Type Name – Enter the name of the shift established in the system that is appropriate for the time study participant (go to Configuration menu then Shifts to see list in claiming system)
    j. Last Name – Enter last name of time study participant
    k. First Name – Enter first name of time study participant
    l. Middle Name – Enter the middle name of time study participant (if applicable)
    m. Email – Enter the participant's unique email address. Email address is required for the time study

     n. Employee ID – Enter the district created employee ID (can use ID assigned by human resources, business office/finance, etc.). DO NOT use social security numbers

     o. Employee Status Name – Enter either 'Salaried' or 'Contracted'

     p. New Person – Enter 'Y' when adding a new participant to the staff pool list

     q. Update last Name or Email – Enter 'Y' when updating a participant's last name or email address

     r. Email CC Person Email

     s. Delete Job Span – Wen entering a new participant this will be blank

     t. Begin Date – Enter the employee start date in MM/DD/YYYY format (to be the first date of the quarter start unless the participant is a replacement in which case the exact hire date should be used)

     u. End Date – When adding a new participant this field will be blank

     v. Inactivate – When adding a new participant this field will be blank

5. To delete/inactivate a participant locate the participant the Excel export file, then enter the participant's end date (end date must be a date after their start date). Do not delete the participant data, this does not remove the participant from the SPL. Make sure to enter 'Salaried' or 'Contracted' in the **EmploymentStatus.Name** column if it is blank.

CostPool.Name	Agency.Name	ParentAgencyName	JobSpanId	JobPositionId	JobCategory.Name	JobTitle	Description	ShiftType.Name	LastName	FirstName	MiddleName	Email	EmployeeId	EmploymentStatus	NewPerson	UpdateLastNameOrEmail	EmailCCP	DeleteJobSpan	BeginDate	EndDate
Administrative C	Demo Element	PCG Unified School L	12636	11522	Non-licensed Social Worker			M-Th 7:30 - 4:00	Arnold	Wayne		awayne@	1234321	District Payroll			cotestcoordinator4@gma		4/1/2017	
Direct Service	Demo Element	PCG Unified School L	12650	1446	Personal Care Aide/Teacher's Aide			M-Th 7:30-4:00	Garrett	Edna		garrettedna@colorado	District Payroll					10/1/2020	
Direct Service	Demo Element	PCG Unified School L	12652	1447	Personal Care Aide/Teacher's Aide			M-Th 7:30-4:00	Myers	Mindy		1468@test.com	District Payroll					10/1/2020	
Direct Service	Demo Element	PCG Unified School L	12653	1448	Personal Care Aide/Teacher's Aide			M-Th 7:30-4:00	Cooper	Winnie		wcooper@	123456/898	District Payroll					10/1/2020	
Direct Service	Demo Element	PCG Unified School L	12655	8487	Special Education T	Special Ed Teacher		M-Th 7:30-4:00	Light	Laura		8436@test.com		District Payroll					10/1/2020	
Administrative C	District Wide	PCG Unified School L	12656	9255	Administrator			M-Th 7:30-4:00	Tomson	Traci		9286@test.com		District Payroll					10/1/2020	
Administrative C	District Wide	PCG Unified School L	12646	11520	Non-licensed Social Worker			M-Th 7:30-4:00	Tribbianni	Joey		test1@gmail.com		District Payroll					10/1/2020	
Administrative C	District Wide	PCG Unified School L	12647	11523	Non-licensed Social	Social Worker		M-Th 7:30-4:00	Smith	Jerrod		2346@test.com		Contracted					10/1/2020	

After you have saved the updated export file as an **Excel Workbook**, you will import the file into the PCG claiming system completing the following steps:

1. Click on '**Import**' at the top of the 'Staff Pool Positions' screen.

2. Click '**Browse'** to locate the updated Staff Pool List file

3. After you have located the file, click on '**Upload'** to import the updated SPL to the RMTS site

4. Once the confirmation screen appears, review the data included within the upload and click the text box that reads '**I have reviewed and verified the log**' if the upload contains the expected results. After the verification box is selected, the '**Commit**' option becomes available. Click on the '**Commit**' button to proceed, or select the 'Close' button if the file does not contain the expected data (has errors).

5. If there is an error in the import file, you will receive an error message. Common errors that occur are:

- Entering data in the wrong columns
- Duplicate entries (participant already exists in the site)
- Unauthorized worksheet name change
- Employment Status field is blank for any participant (even participants where no changes were made)
- Shift names do not match the system

6. If no errors have been detected the file will load successfully and you will receive a confirmation email in addition to the confirmation screen below. Click 'Close' to return to the SPL. It is very important that the SPL list is reviewed for accuracy prior to certification.

VIII.   CERTIFYING THE STAFF POOL LIST

After all updates have been completed, the coordinator must certify the SPL. Before certifying the SPL, please be sure the list is accurate and complete. In order to meet program requirements, each district must submit a SPL including the direct service cost pool for each quarter. **Please note that you must certify your staff pool list in order to be included in the time study for the quarter.**

1. Click on the 'Staff Pool Positions' link from the 'People' dropdown on the 'Home' screen.

The PCG Claiming System will prompt the message(s) below when coordinators attempt to certify their SPL and one (or more) of the following conditions are present:

- District has assigned the same shift to all active participants assigned to a single location

- District has one or more active shifts that are currently not assigned to an active participant

- District only has a single active shift

This Shift Configuration message will not prevent a coordinator from certifying their SPL but will require coordinators to review their shifts for accuracy and confirm all shifts are correct. See the two confirmation screens:

If changes need to be made, reference page 13 on this guide.

2. The staff pool will display. Select the 'Certify Staff Pool' box to certify the staff pool.
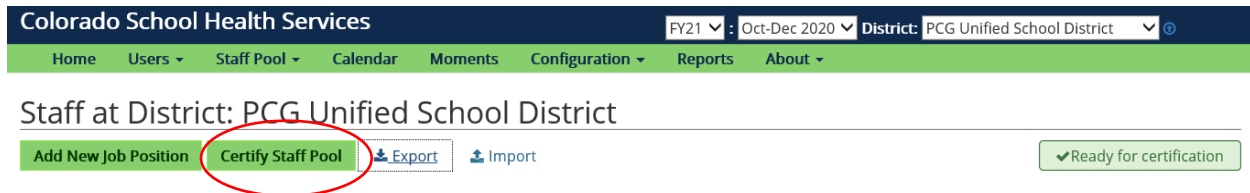
The system will display the message that the SPL has been certified successfully. Once the SPL is certified it is locked. If the district coordinator identifies a change to be made prior to the sample generation contact PCG to unlock the SPL. The district coordinator will need to re-certify the SPL in order to be included in the quarter.

IX. REPORTS

Select the 'Report' drop down from the home screen to see a list of all available reports.
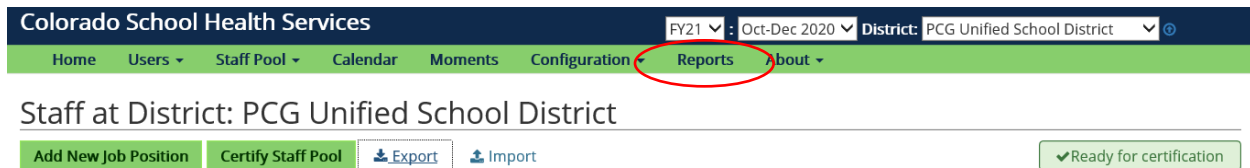
A list of reports available to the district coordinator to help manage the RMTS are as follows:

- **Active Participants** - Displays all participants who are active at the time of running the report. This is a 'real time' report and so it should not be used to determine if a participant was included on a previous SPL. (See SPL History report for previous quarters SPL)
- **SPL History** - Displays the finalized snapshot of the SPL from which the sample was drawn for a particular quarter. Please note: The appropriate quarter needs to be selected in the quarter drop down
- **District Compliance Report** - Displays the completion status for all the moments and corresponding participants in a quarter. District Coordinators can use this report to show moments from the start of the active quarter within the next five (5) school days to determine the status of moments
- **District Master Sample File** – Displays the master sample file – all the moments and corresponding participants selected for a quarter
- **Shift Report** Displays all agencies for current quarter along with the count of participants under each shift type

X. MOMENTS

All sampled moments that have already occurred and upcoming moments that are within twenty-four (24) hours of the sampled moment can be found by selecting the 'Moments' option from the home screen ribbon bar. *Please note*: Districts will only be able to view moments in the selected quarter drop down. To view moments from previous quarters the appropriate quarter needs to be selected from the drop down.

The submit column displays the date the RMTS form was submitted or completed by the participant.

Moments can be displayed by the following views:

View by Participant - To view the sampled moments by participant, enter the participant's **Last Name** and **First Name**, and click '**Filter'**. This will return the sampled moments by participant that have already occurred and those moments that are within five (5) days of the sampled moment.

View by Status - The sampled moments can be viewed by the status of the moment. Utilize the **Status** to monitor staff's participation in the program.

- **Completed** – This view displays all moments that have been submitted / completed.

- **Not Completed** – This view displays all moments that have not been responded to. As a coordinator you will use this to monitor staff's participation to ensure that the sampled moments are completed timely.
- **Pending Participant Response** – This view displays moments that have been responded to, but have not yet been assigned a code.

Select desired status filter option and click 'Filter' to view the status of the forms. Depending on the level of system access all filters may not be available.

View by Cost Pool – The sampled moments can be viewed by Cost Pool. This view displays the sampled moments by the cost pool that the assigned participant is listed under on the staff pool list.

View by Job Category – The sampled moments can be viewed by Job Category. This view displays the sampled moments by a specific job category within the staff pool list.

Click on the drop down arrow then select desired Job Category for display and click 'Filter'.

XI. PARTICIPANT SCREENS

EMAIL NOTIFICATIONS

The selected time study participant will receive the following email notifications regarding his/her RMTS form:

- Colorado Random Moment Time Study Notice
  - Sent twenty-four (24 hours before the moment – contains the hyperlink for the moment
  - Sent six (6) hours before the moment – contains the hyperlink for the moment
  - Sent one hour before the moment – contains the hyperlink for the moment
  - Sent at exact time of the moment – contains the hyperlink for the moment

- Colorado Random Moment Time Study Notification – Late Notice
  - Sent three (3) hours after the moment, if the moment has not been completed – does not contain hyperlink for the moment
  - Sent six (6) hours after the moment, if the moment has not been completed – does not contain hyperlink for the moment
  - Sent twelve (12) hours after the moment, if the moment has not been completed – does not contain hyperlink for the moment

Sent: Friday, June 2, 2015 11:00 AM
To: State of Colorado Time Study
Subject: Colorado Random Moment Time Study Notice

Colorado School Health Services Program

Dear RMTS Participant,

You have been selected to participate in the Random Moment Time Study (RMTS) sample.

Your sample moment in time will occur on:

6/2/2015 3:07 PM (MST)

To access your RMTS form, please use the link below:

https://staging-claimingsystem.pcgus.com/cotesting/MomentComplete/?code=321a7ae7-9e8d-449f-b1d5-b505454222aa

You will receive an e-mail just prior to your random moment that will include a link to your RMTS form.

After your random moment has passed, follow the instructions for completing the form and submit the form as soon as possible.

PLEASE DO NOT RESPOND TO THIS E-MAIL

Thank you for your participation.

The emails will come from **cormts@pcgus.com**. The sampled participant will receive the first email notification **twenty-four (24) hours** prior to his/her selected moment in time.

The email notification will provide the time study participant with a link to access the on-line RMTS form. The hyperlink to respond to the moment will be included in the first two (2) email notifications.

The time study participant will receive three (3) follow-up emails if the RMTS form is not completed on the day of the sampled moment in time. The district coordinator will be copied on

all late notification emails that are sent to the participant. However, the participant's link to respond will not be included in the notification emails.

If the participant has deleted or lost his/her emails that contains the hyperlink to respond to the moment, the coordinator can use the resent link button next to the participants moment.

PARTICIPANT MOMENT ACCESS

To access the time study, the participant will click the hyperlink located within the body of the email notification.

The hyperlink will be included in the Colorado RMTS email notices which are sent according to the following timeline:

- First Notice – twenty-four (24) 24 hours prior to actual moment
- Second Notice – six (6) hours prior to actual moment
- Third Notice - Actual moment.

PROGRAM OVERVIEW AND ONLINE TRAINING MATERIAL

The following screens provide the participant with an overview of the RMTS as well as training material on how to complete the on-line RMTS form.

To read the on-line training information, the participant will click '**Next'** to advance through the screens.

Claiming System

Name: Purvis, Amy; **Email:** ap@test.com; **Moment:** 5/6/2020 at 9:38 AM

Welcome to the State of Colorado Time Study!

This Web site should be self explanatory and should guide you through the short response process. If you have questions regarding RMTS at any time, please call the helpline at (866) 766-9015. Click 'Next' to continue.

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Claiming System

Name: Purvis, Amy; **Email:** ap@test.com; **Moment:** 5/6/2020 at 9:38 AM

Program Overview

This time study is required by the State Medicaid office in order for your school district to participate in the Medicaid School Health Services Program. This system uses the RMTS (Random Moment Time Study) method which provides a statistically valid means of determining what portion of the selected group of participant's workload is spent performing activities that are reimbursable by Health First Colorado.

You have been randomly selected to participate in the RMTS this quarter. *Your participation is mandatory, but will only take a few minutes of your time.*

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Claiming System

Name: Purvis, Amy; **Email:** ap@test.com; **Moment:** 5/6/2020 at 9:38 AM

What is Medicaid?

Medicaid is a federally funded health insurance program for lower income individuals as well as for individuals meeting certain other requirements. In Colorado it is referred to as Health First Colorado.

Health First Colorado is a program for children under age 21 who receive services through the Early & Periodic Screening, Diagnosis and Treatment (EPSDT) Program, including medical and mental health services determined medically necessary.

Examples of Activities: Working with student on occupational therapy goals.

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Claiming System

Name: Purvis, Amy; **Email:** ap@test.com; **Moment:** 5/6/2020 at 9:38 AM

What is the School Health Services Program (SHS)?

SHS is a joint state and federal program that offers district's reimbursement for the provision of "covered medically necessary" school based services, as well as the cost of administrative activities such as outreach and other activities that support Health First Coloraodo covered services in the school setting.

It is a chance for school districts and charter schools to receive reimbursement with very little effort involved for personnel.

There are two ways Medicaid pays for services provided in the schools:

1. Direct Services Claiming (DSC) Program
2. Medicaid Administrative Claiming (MAC) Program

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Claiming System

Name: Purvis, Amy; Email: ap@test.com; Moment: 5/6/2020 at 9:38 AM

What is the Random Moment Time Study?

- Random Moment Sampling is a federally accepted method for documenting your time.
- For each calendar quarter employee data from each participating school district is compiled to form a statewide sample pool
- Names are randomly selected and paired with random moments in time to create "sample moments". Sampled employees complete an electronic RMTS form.
- Employees complete their sample form on or after their "sample moment". Electronic forms are submitted directly to PCG through the completion of the electronic RMTS form.
- All sampled moments must be completed to obtain a statistically valid sample.

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Claiming System

Name: Purvis, Amy; Email: ap@test.com; Moment: 5/6/2020 at 9:38 AM

Getting Started

On the next page, you will see the date and time of your moment. Please select the moment you want to answer by clicking on the blue word "Respond" next to your moment. You will then be asked five simple questions. Please be sure to hit "Submit" when you are done, so your answers are recorded. If you need further instruction, please follow the link on the next page to "Activity Descriptions," which provides detailed instructions for filling out the time study. Click "Next" to continue..

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Claiming System

Name: Purvis, Amy; Email: ap@test.com; Moment: 5/6/2020 at 9:38 AM

Completing the Electronic RMTS Form

After your sampled moment in time has occurred, complete your RMTS form documenting the activity you are performing at the specific moment selected in your work day. You will document your activity by answering ALL of the following questions:

Were you working during your sample moment?
(select appropriate radio button when prompted)
Yes, I was working
No, Moment is before/after workday (This does not include lunch)
No, Moment is during paid day off
No, Moment is during an unpaid day off

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Claiming System

Name: Purvis, Amy; Email: ap@test.com; Moment: 5/6/2020 at 9:38 AM

Completing the Electronic RMTS Form (continued)

Is the service you provided part of the child's medical plan of care where medical necessity has been otherwise established?u>.
(*select appropriate radio button when prompted*)

Response 1: Yes – IEP/IFSP
Response 2: Yes – Medical plan of care other than an IEP/IFSP (i.e. 504 plan, student health plan, nursing plan, physician's order, crisis intervention services)
Response 3: Yes – Medical necessity established in other method (i.e. EPSDT or other state/Federal mandates)
Response 4: No
Response 5: N/A

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Claiming System

Name: Purvis, Amy; Email: ap@test.com; Moment: 5/6/2020 at 9:38 AM

Completing the Electronic RMTS Form (continued)

Describe in detail the activity you were performing during your sample moment.
Please answer this question even if you answered "No" to the previous question.
Response 1: Contacting parents to set up an IEP meeting for student speech/language needs.
Response 2: Conducting a psychosocial evaluation with a student.
Response 3: Working with a student on a motor skill activity.
Response 4: Meeting with a school counselor regarding a student's vocational rehab.

Describe in detail why you were doing this activity during the sample moment.
Response 1: Student is in need of speech/language services.
Response 2: Student is coming up for a triennial staffing and evaluation is necessary.
Response 3: Was a scheduled activity for this student today, per IEP.
Response 4: Coordinating job training for student's employment.

Do not copy these examples into your sample moment.

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Instructions and Tips for Completing Your Moment

After the participant has completed reading the training material and instructions, the participant will click '**Next'** to access the RMTS form.

XII.   COMPLETING THE RMTS FORM

DURING NON-WORKING DAY
If the participant selects that he/she was not working, the RMTS form will automatically populate. Click 'Next' to view the completed form.

When the participant selects that he/she was not working during their sampled moment in time, the form will automatically populate with the reason that participant selected for not working.

To make changes, the participant can click the '**Edit'** button and return to the previous screen to make any necessary changes.

To complete the RMTS form the participant **must** complete the check box at the bottom of the form. By checking this box the participant is stating that he/she has accurately completed the random moment time study.

After the participant has clicked on the check box, the '**Submit'** button will appear. The participant can now click the button to submit the form for coding. The participant will receive confirmation that the form was submitted successfully.

MOMENT DURING WORKING DAY
If the participant was working during his/her sampled moment they will select 'Yes, I was working' and click the 'Next' button.

The participant must answer all of the questions, documenting the activity that was being performed at his/her sampled moment in time. ALL five (5) questions must be answered to complete the form. After completing the form, the participant will click the **Next** button to view the completed RMTS form.

The participant should review the completed form to ensure that they have accurately documented the activity that they were performing during the sampled moment in time.

To make changes, the participant will click the '**Edit'** button to return to the questions.

To complete the RMTS form the participant **must** complete the check box at the bottom of the form. By checking this box the participant is stating that he/she has accurately completed the random moment time study.

After the participant has clicked on the check box, the '**Submit Moment'** button will appear. The participant can now click the button to submit the form for coding. The participant will receive confirmation that the form was submitted successfully.

Responses in the previous 2 system screen shots are for example only and should not be used by participants to complete their sampled moment.

REQUEST FOR FOLLOW-UP

PCG will notify the participant via email if additional information is needed to accurately code the completed sample moment. When the participant's response does not provide enough information to accurately code the moment, PCG will send the participant a request for follow-up via email.

The follow-up email will come from cormts@pcgus.com and contain the hyperlink to access the moment. The participant can receive up to three (3) email requests for follow-up. The participant is provided 3 days between notifications to access the RMTS system and provide the additional information that is being requested. If the participant fails to provide the additional information after the first request, the districts RMTS Coordinator is copied on the second and third email request.

PCG will provide the participant with the hyperlink to access the moment in the first two (2) email notifications for follow-up. However, the hyperlink for the moment will not be provided in the third request that includes the RMTS Coordinator.

Each moment is assigned a hyperlink. You must use the hyperlink in the email notification associated with the specific moment to access the claiming system and complete the moment on-line.

If you lose or delete the email notification containing the RMTS link contact the PCG RMTS helpline at 1-866-766-9015 to have the email notification resent.

The participant must complete the on-line training screens, clicking **Next** to progress through the screens. The Claiming System does not allow the original response to be altered. The participant will provide the information requested by PCG and then click **Save** to complete the form.

XIII.   FREQUENTLY ASKED QUESTIONS

What if a participant does not have a work email address?
All participants must have their own unique email address and the email address cannot be shared. If a participant does not have a unique email address a paper moment will be issued.

What if a selected participant quits prior to the sampled moment in time?
Notify PCG prior to the sampled moment and provide the term date. If there is a direct replacement, the replacement's name and email address should be entered within the RMTS system. Please reference page 25 of this guide for detailed instructions on how to replace a participant within the system. The direct replacement information can also be provided to PCG.

What if a selected participant is on leave during the sampled moment in time?
Notify PCG prior to the sampled moment that the participant is on leave, the start and end date of the leave, type of leave, and if the leave is paid or unpaid.

How do we know if someone has completed their RMTS form?
By reviewing the Moments List (From the home screen Moments>All), the district coordinator can see who has not completed their on-line RMTS form. The district coordinator will also be copied on the 24 Hour Late Notice and the 3 Day Late Notice email notifications sent to the participants when they have not completed their on-line RMTS form. The coordinator also has 24/7 access to the Compliance Report which shows who has not completed their on-line RMTS form.

How will the participants know when they have received their email notifications?
The email notifications will come from cormts@pcgus.com. Participants should not respond to the RMTS email notifications and should direct all questions to their district RMTS coordinator.

What if the participant deletes their email notifications with the link to access their moment?
The participant must contact the RMTS coordinator to resent the moment.

The link to access moments will not be provided to the district RMTS coordinator. The participant should complete the on-line RMTS form within twenty-four (24) hours from the sampled moment in time.

Can participant data be updated in the RMTS system during the quarter?
Updating participant data such as correcting the spelling of a name and updating an email address can be completed at any time during the quarter. However, the only update/change that will be effective immediately is the email address. Any changes in status, name, school location or the addition of new participants, will not affect the sample for the current quarter once the sample has been generated, but will be updated for the next quarter.