



Quarterly PBJ Webinar

Q2 2023 EDITION

The latest answers on PBJ, staffing,
and more before the **May 15 deadline**

SimplePBJ™



Your Speakers



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Agenda

- Common PBJ Questions
- Five-Star Calculation Review
- Turnover, Calculation Timeline, and EmployeeID Linking
- Maximizing HRD Scores
- PBJ Submission Success and Best Practices
- SimplePBJ Updates
- Live Q&A

Common PBJ Questions

When will PBJ will move to iQIES?

Answer:

As of right now, CMS has not indicated a timeframe for moving PBJ submission to iQIES.

Note: submitting PBJ files through SimplePBJ will still be an option.



Common PBJ Questions

What is the CMS rule for accounting for meal breaks in our PBJ shifts?

Answer:

The general rule is that CMS requires a 30-minute meal break for **every 8-hour shift**, or equivalent. For double-shifts, a total of 60 minutes should be removed.

Note: If the employee worked through lunch or did not punch out, the meal break still needs to be deducted.



Common PBJ Questions

We had a change in one or more of our EmployeeIDs... is that OK and what do we need to do?

Answer:

It's important to keep EmployeeIDs consistent from one quarter to the next, when possible.

If an EmployeeID does change for one or more staff members, be sure to submit an EmployeeID Linking file to CMS.



Common PBJ Questions

Is it a problem if a staff member works more than 80 hours in a single week?

Answer:

Just make sure it's accurate! If an hourly (Non-Exempt) or Contract staff member **works** that many hours and **is paid for it**, reporting those hours is usually the best practice.

Just keep in mind that submitting more than 80 hours/week for a staff member can prompt CMS to issue a PBJ audit.



Turnover Reminders

- CMS calculates turnover entirely from PBJ EmployeeID and shift data
- Eligible staff (Denominator): At least 120 hours worked over any 90-day period
- Turnover triggered (Numerator): No hours worked for 60 consecutive days
- Turnover calculation applies to all Pay Types: Exempt, Non-Exempt, and Contract
- If EmployeeIDs change, CMS will calculate the old EmployeeIDs as turnover

Turnover – Current Calculation Timeline

Turnover Lookback Timeline (April 2023 – June 2023 Five-Star Reports)

Q0	Q1	Q2	Q3	Q4	Q5
Jul – Sep 2021	Oct – Dec 2021	Jan – Mar 2022	Apr – Jun 2022	Jul – Sep 2022	Oct – Dec 2022
Denominator					
	Numerator				

EmployeeID Linking Reminders

An EmployeeID Linking file can be submitted to CMS to connect multiple EmployeeIDs for the same individual.

- Only needs to be used if EmployeeID values have changed within the past 2 years
- Must be submitted to CMS by the PBJ deadline in order to be included in the next cycle of turnover calculation

EmployeeID Linking Reminders

EmployeeID Linking files are submitted to CMS and must follow some specific validation requirements in order to be accepted:

- Must be submitted for the current quarter, but the linking process applies historically to previous quarters
- Both “old” and “new” EmployeeIDs must already exist in CMS’ database (if submitting new IDs for the first time this quarter, submit the PBJ file first, then submit the linking file)

SimplePBJ: Creating an EmployeeID Linking File

The screenshot displays the SimplePBJ web application interface. At the top, the header includes the SimplePBJ logo, the active facility 'Sunnyside', and the reporting quarter '2023 2nd Quarter (1/1/2023 - 3/31/2023)'. The user 'Nate Hoard' is logged in, and the current page is 'Home / Staff'. The left sidebar contains a navigation menu with 'Staff' highlighted. The main content area is titled 'Review & Modify Staff' and 'EmployeeID Linking'. A blue callout box provides instructions: 'CMS is aware of situations when a facility needs to change the employee ID for one or more of its staff. In order to maintain the reporting of an employee's hours through an employee ID change, they have added a method to link an employee's old employeeID to a new one. For more information, please see: [Changing Employee Identifiers in the Payroll-Based Journal \(PBJ\) System](#). To create an employeeID Linking PBJ file, please download the template below. Open the template and add a row for each employeeID that needs to be linked in the CMS PBJ. Be sure to leave the top header row in the template file and save as a CSV. Once done, upload the completed document using the form button below. Doing so will generate a new CMS PBJ XML file. **Please note:** the CMS PBJ linking file can only contain employeeIDs that have already submitted data--this includes both the old EmployeeID and the new EmployeeID. Also, this linking file must be created for, and uploaded to, the latest quarter for which you have submitted data. If you have submitted data for the next quarter, please change reporting quarters above before uploading the template.' Below the callout, there is a 'Download SimplePBJ EmployeeID Linking Template' button, a file selection field with a 'Choose File' button, and an 'Upload Completed EmployeeID Linking Template' button.

Maximizing HRD Scores

HRD Measures account for at least 66% of the overall staffing score. Some keys to making the most of your HRD measures are:

- Make sure all nursing hours (worked + paid) are accounted for
- Work with MDS team to verify that CMS' census is accurate
- Capitalize on the weekend Total Nursing measure by increasing weekend staffing as needed (not just RN coverage)

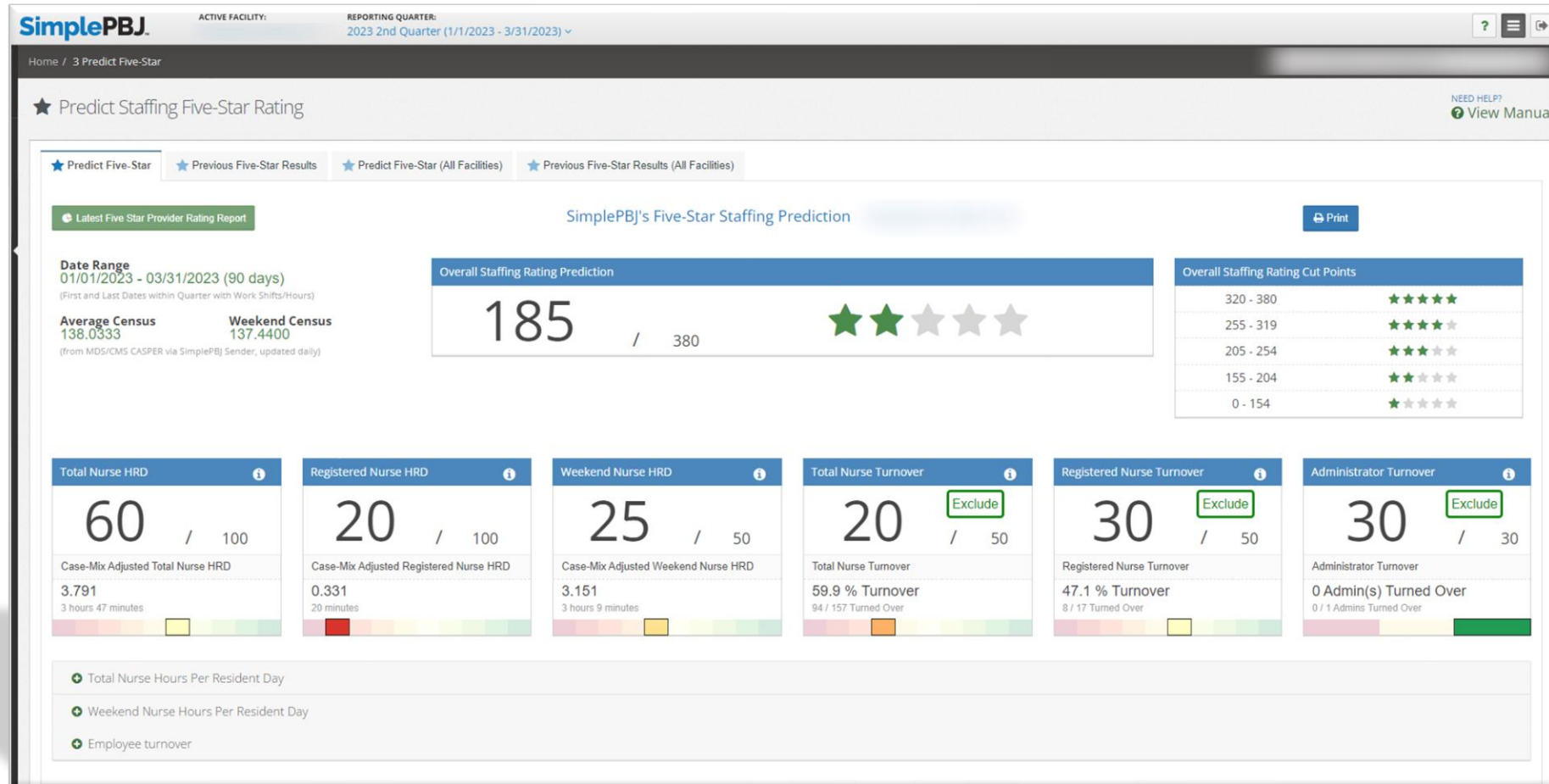
PBJ Submission Success

● Compile the pieces (all payroll, time-keeping, or agency data) as soon as you can, and submit your PBJ data well ahead of the May 15 deadline.

● Utilize every automation tool available, but keep in mind that for PBJ there is no substitute for skillful review and manual validation.

● If your facility went through a recent CHOW, work together with the organization to put together a plan for PBJ submission.

Predicting Your Staffing Rating



Turnover Data



Actual CMS data



Historical look-back



Live pre-submission predictions

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Predict Five-Star | Previous Five-Star Results | Predict Five-Star (All Facilities) | Previous Five-Star Results (All Facilities)

Latest Five Star Provider Rating Report

SimplePBJ's Five-Star Staffing Prediction

Date Range: 07/01/2022 - 09/30/2022 (92 days)
(First and Last Dates within Quarter with Work Shifts/Hours)

Average Census: 158.9239 | Weekend Census: 158.2308
(from MDS/CMS CASPER via SimplePBJ Sender, updated daily)

Overall Staffing Rating Prediction: 240 / 380 (3 stars)

Overall Staffing Rating Cut Points:

320 - 380	★★★★★
255 - 319	★★★★☆
205 - 254	★★★☆☆
155 - 204	★★☆☆☆
0 - 154	★☆☆☆☆

Looking for your turnover data? Check out the Employee Turnover section below or click on any of the Turnover Measure cards to see more information.

Total Nurse HRD

40 / 100

Case-Mix Adjusted Total Nurse HRD

3.328
3 hours 20 minutes

Registered Nurse HRD

90 / 100

Case-Mix Adjusted Registered Nurse HRD

0.999
60 minutes

Weekend Nurse HRD

20 / 50

Case-Mix Adjusted Weekend Nurse HRD

2.951
2 hours 57 minutes

Total Nurse Turnover

35 / 50 (Exclude)

Total Nurse Turnover

48.1% Turnover (51 / 106 Turned Over)

Registered Nurse Turnover

25 / 50 (Exclude)

Registered Nurse Turnover

53.1% Turnover (17 / 32 Turned Over)

Administrator Turnover

30 / 30 (Exclude)

Administrator Turnover

0 Admin(s) Turned Over (0 / 2 Admins Turned Over)

Total Nurse Hours Per Resident Day

Weekend Nurse Hours Per Resident Day

Employee turnover

Employee Turnover

	Numerator	Denominator	Turnover
Total Nursing Turnover	51	106	48.1%
Registered Nurse Turnover	17	32	53.1%
Administrator Turnover	0 Turned Over	2 In Measure	

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Turnover Before Current Quarter | Turnover During Current Quarter

Measure	Employeeid	Pay Code	Job Code	Eligibility Date	Turnover Date
Administrator Turnover	2970128804	3 - Contract	1 - Administrator	07/01/2021	-
Administrator Turnover	2970128873	3 - Contract	1 - Administrator	07/01/2021	-
Total Nursing Turnover	2970118790	3 - Contract	10 - Certified Nurse Aide	07/04/2021	-
Total Nursing Turnover	2970119278	3 - Contract	10 - Certified Nurse Aide	07/01/2021	-

Latest SimplePBJ Updates

Date Range
10/01/2022 - 12/31/2022 (92 days)
(First and Last Dates within Quarter with Work Shifts/Hours)

Average Census
43.9130
(from MDS/CMS CASPER via SimplePBJ Sender, updated daily)

Weekend Census
44.1111

Overall Staffing Rating Prediction

170 / 380

Total Nurse HRD i

60 / 100

Case-Mix Adjusted Total Nurse HRD

3.653
3 hours 39 minutes

Registered Nurse HRD i

50 / 100

Case-Mix Adjusted Registered Nurse HRD

0.505
30 minutes

Weekend Nurse HRD i

25 / 50

Case-Mix Adjusted Weekend Nurse HRD

2.985
2 hours 59 minutes

⊖ Total Nurse Hours Per Resident Day

Set a goal for each staffing measure

See the staffing impact

Estimate the staffing cost

Latest SimplePBJ Updates

The screenshot displays the 'Send to CMS' interface in SimplePBJ. A dark sidebar on the left contains navigation options: Home, Assemble Staffing Data, Validate PBJ Data, Predict Five-Star, Submit Report, Create PBJ File, Send to CMS, View CMS Reports, Reporting Status, Benchmark PBJ, Utilities, Settings, Help, and Admin. The main content area is titled 'Send to CMS' and includes a blue informational banner: 'When ready to download and save, click the Download button next to the desired PBJ Zipped XML File. Once saved to your computer, the zipped XML file is ready for uploading to CMS. For tracking purposes, you can return to this page after your CMS upload and record that CMS accepted the file.' Below this is a section for 'Previously Created PBJ Reports' with a search bar and a 'Show Reports for All Facilities?' toggle. A table lists reports for three facilities: Sunny Acres, Sunnyview, and Sunnyside. Each report row includes a 'Send to CMS' button. A blue circle highlights the 'Send multiple facilities to CMS' button in the top left of the report list, and another blue circle highlights the 'Show Reports for All Facilities?' toggle.

Facility	PBJ Report Information	PBJ Created	Download PBJ File for CMS	CMS Submission Status
<input checked="" type="checkbox"/>	Sunny Acres Standard PBJ XML Report Report Status: Created Successfully Report Date Range: Entire Quarter Staffing Hours Process Type: Replace	04/24/2023 01:44 PM	PBJ-1234_04-24-2023_18.04.32.zip	Send to CMS
<input checked="" type="checkbox"/>	Sunnyview Standard PBJ XML Report Report Status: Created Successfully Report Date Range: Entire Quarter Staffing Hours Process Type: Replace	04/24/2023 01:37 PM	PBJ-54321_04-24-2023_18.04.52.zip	Send to CMS
<input checked="" type="checkbox"/>	Sunnyside Standard PBJ XML Report Report Status: Created Successfully Report Date Range: Entire Quarter Staffing Hours Process Type: Replace	04/24/2023 01:34 PM	PBJ-12345_04-24-2023_18.04.56.zip	Send to CMS

Send multiple files to CMS with one click.



Your one-stop shop for PBJ success

Assemble, validate and submit your PBJ

Predict Staffing Five-Star ratings

Submit PBJ reports with one click

Benchmark results against other facilities

[REQUEST DEMO](#)



QUESTIONS?

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Thank you for attending!

[Recording and slides are available here](#)

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