

Quarterly PBJ Webinar

The latest answers on PBJ,
staffing, and more before the
Nov 14 deadline

Q4 2024 Edition

THU, NOV 7 | 2 PM CT

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a Netsmart solution


Netsmart



PBJ SUBMISSION GIVEAWAY

Submit your PBJ early & you could win!

The PBJ deadline is Thursday, Nov 14



Submit your PBJ data through SimplePBJ by midnight ET on Nov 11 for a chance to win

1st prize: \$100 Visa gift card (*use anywhere*)

2nd prize: 40 oz. Stanley tumbler (*choose your color*)

Winners announced Nov 13



Your Speakers



Nate Hoard

PBJ Solution Strategist – Simple



Jolene Johnson

President – Luminate Healthcare

Agenda

- Key PBJ Must-Do's
- Keeping up with your CMS Census
- Five-Star Tips
- Surviving Audits with your PBJ Data
- Latest CMS Updates
- Newest SimplePBJ Features
- Live Q&A

Live Poll



What component(s) of the PBJ process concerns you the most?

Select all that apply

PBJ Must-Do: meal break requirements

Unpaid or paid?

Mealtimes, paid or unpaid, shall not be reported for all staff including:

- Exempt | Non-exempt | Contract

Example using unpaid meal breaks:

- 8-hour shifts and are paid to work 7.5 hours (with a 30-minute unpaid meal-break) – 7.5 hours shall be reported.
- 8.5-hour shifts and are paid to work 8 hours (with a 30-minute unpaid meal-break) – 8 hours shall be reported.
- 12-hour shifts and are paid to work 11.5 hours (with a 30-minute unpaid meal-break) – 11.5 hours shall be reported.
- 16-hour shifts (two 8-hour shifts) and are paid to work 15 hours (with two 30-minute unpaid meal-breaks) – 15 hours shall be reported.
- 17-hour shifts (two 8.5-hour shifts) and are paid to work 16 hours (with two 30-minute unpaid meal-breaks) – 16 hours shall be reported.

PBJ Must-Do: submitting overnight hours

Requirements:

- *The day and date associated with the number of hours paid to work.*
- *When reporting hours per day, hours reported shall be by the calendar day.*
- *Midnight is the cutoff for each day reported.*

For example:

- Shift starts at 11:00 PM on 4/5 and ends at 7:00 AM on 4/6
- 1 hour would be recorded for 4/5
- 7 hours for 4/6

Keeping up with your CMS Census

Steps to take:

Run MDS 3.0 MDS Roster (under MDS 3.0 Provider Reports Header) and Review to assess if residents are present on the listing who are no longer in house.

For those residents who are no longer in house, ensure the Entry and Discharge MDS assessments match on MDS: Full Name, Birth date, Gender and social security number AND have been accepted into the state database. If there are discrepancies reach out to your MDS consultant or State RAI automation coordinator.

Also, ensure your Casper MDS missing assessment report is clear.

Turnover – Current Calculation Timeline

Lookback Timeline: Total Nursing and RN Turnover (October 2024 – December 2024 Five-Star Reports)

Q0	Q1	Q2	Q3	Q4	Q5
Jan – Mar 2023	Apr – Jun 2023	Jul – Sep 2023	Oct – Dec 2023	Jan – Mar 2024	Apr – Jun 2024
Denominator					
	Numerator				

12-Month Reporting Period: Administrator Turnover

April 2023 – March 2024

Five-Star Tips

- Ensure a minimum of 8 RN hours are worked every day
- Increase nurse staffing over the weekends if possible
- Pay close attention to Agency nursing staff and whether they will qualify for turnover calculations (denominator: 120 hours worked over any 90-day period; numerator: then 90 consecutive days of no shifts)
- Continually coordinate with your MDS and administrative team to make sure your CMS census is accurately measured.
- Be vigilant when it comes to coding staff as 1 Administrator. This should only apply to licensed administrators and assistant administrators.

DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
7500 Security Boulevard, Mail Stop C2-21-16
Baltimore, Maryland 21244-1850



Center for Clinical Standards and Quality/Quality, Safety & Oversight Group

April 14, 2023



RE: Payroll-Based Journal (PBJ) Staffing Data – October 1, 2022 through December 31, 2022 Quarter

Dear Administrator,

CMS and their PBJ audit contractor (Conrad and Myers and Stauffer) have reviewed staffing data submitted on behalf of your long term care facility to determine compliance with the submission requirements (in accordance with 42 CFR 483.70(q)) and the PBJ policy manual.

Upon review of the data submitted by February 14, 2023 for the time frame of October 1 – December 31, 2022, we are conducting an assessment of the data for your facility that were submitted to the PBJ staffing hours system. This assessment may also include conducting phone interviews with selected staff in your facility.

Please submit the information identified on Attachments A, C and E of this letter by the 7th day following the delivery date of this certified letter, as indicated by the United States Postal Service delivery tracking service. The facility's certified mail tracking number is [REDACTED]. Instructions on how to submit data can be found on Attachments B, F and G of this letter.

If you do not comply with responding to this request for information supporting the accuracy of your data submission or the results of our review of the submitted PBJ staffing hours shows a significant variance in your Hours per Resident Day (HRD) based on the supporting documentation, your facility will receive a one-star staffing rating in the 5-star Quality Rating System, which may reduce the facility's overall (composite) rating by one star for three months.

For further questions regarding the documents that are requested, contact Carlo Pompei at Cpompei@mslc.com.

Sincerely,

A handwritten signature in blue ink, appearing to read "E. Shulman".

Evan Shulman
Director, Division of Nursing Homes

HOW TO PREPARE FOR CMS-PBJ AUDIT

Surviving Audits with your PBJ Data



- Attachment A, sample list of employees being reviewed
- Attachment D, Provider Survey
- Payroll records (this will show PTO, holidays, sick pay, training pay etc)
- Timecards punch in and out
- Invoices for all contracted employees, timecards , and proof of payment
- Employee Handbook

Surviving Audits with your PBJ Data

Announced or Revised	Title	Component	Report Number(s)	Expected Issue Date (FY)	Summary
November 2023	Audit of Nursing Homes' Nurse Staffing Hours Reported in CMS's Payroll-Based Journal	Office of Audit Services	WA-24-0011 (W-00-24-31575)	2025	Nursing homes are required to electronically submit complete and accurate direct care staffing information to CMS's Payroll-Based Journal (PBJ) system on a quarterly basis... We will review the nurse staffing hours reported in the PBJ to determine whether the reported hours are accurate.
January 2023	Assessment of CMS's Early Use of Payroll-Based Journal Data To Improve Enforcement of Nursing Home Staffing Standards	Office of Evaluation and Inspections	OEI-04-22-00550	2025	In October 2022, CMS began to provide State surveyors with extracts of PBJ staffing data for use in annual nursing home certification surveys/inspections. CMS instructed State surveyors to use this data to investigate specific instances of noncompliance with hourly staffing standards (for example, the requirement to have a registered nurse on duty for a minimum of 8 hours per day). Additionally, CMS instructed State surveyors to review PBJ data for indications of whether a nursing home has met the requirement to have sufficient staffing . Our objective is to assess the early results of CMS's strategy to use PBJ data to improve the enforcement of Federal nursing home staffing standards by State surveyors. We will review CMS's plan for monitoring the success of the strategy and explore State surveyors' experiences with using the data in their surveys.

<https://oig.hhs.gov/reports-and-publications/workplan/active-item-table.asp#example=fpbj>

Latest CMS Updates

- October Five-Star reports release the 2nd cycle of the new PDPM Case-Mix calculations
- CMS continues to establish a new base-line of Case-Mix expectations
- Impact two key elements of the Adjusted HRD formula
 1. Facility-level Case-Mix HRD
 2. National average Case-Mix HRD

Latest SimplePBJ Updates

Now Simple customers who subscribe to SimplePBJ *and* SimpleAnalyzer can see an enhanced HRD prediction of the new calculations:

☖ Total Nurse Hours Per Resident Day

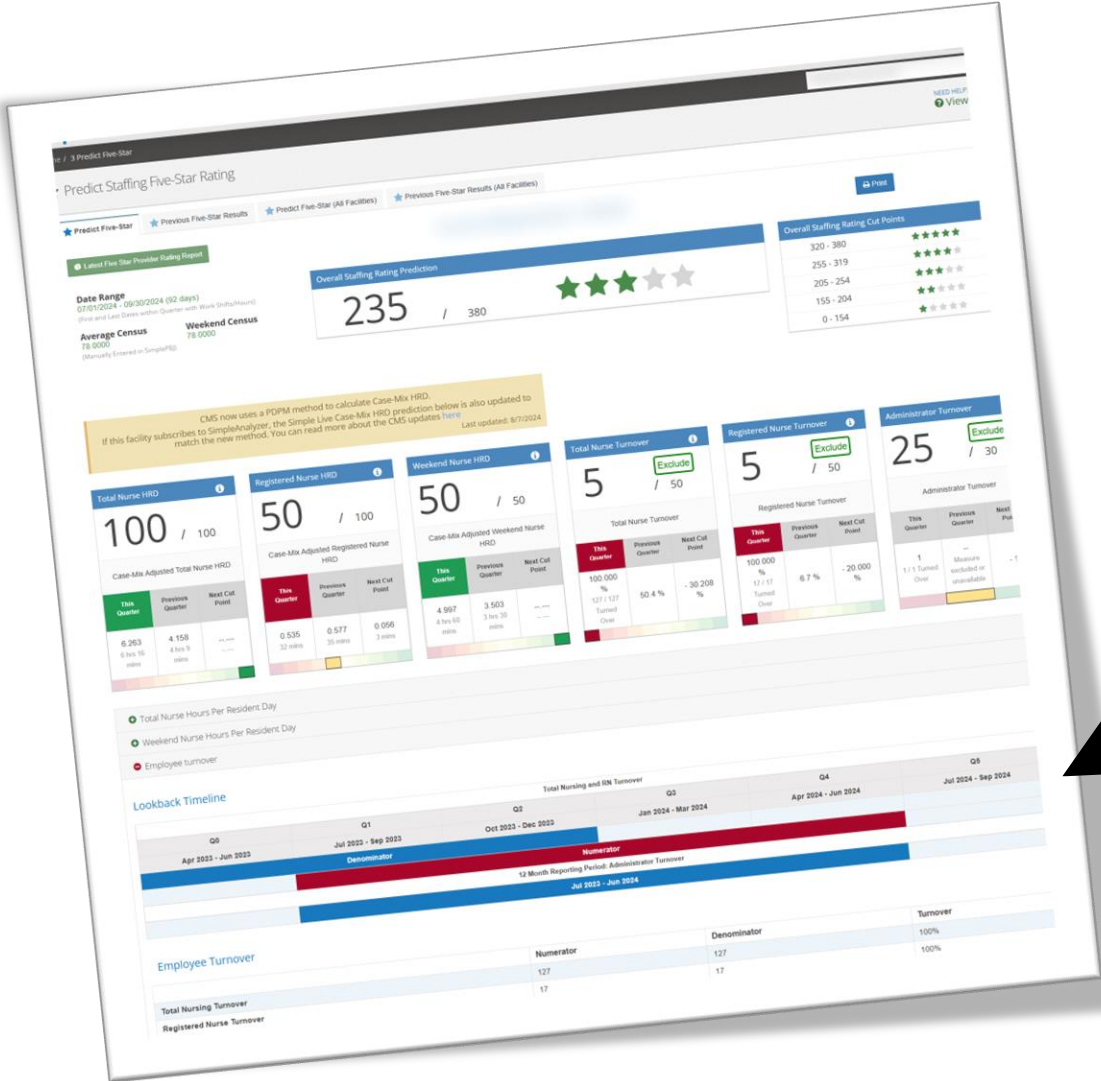
Total nursing hours per resident day

Average Resident Census
95.0000
(Manually Entered in SimplePBJ)

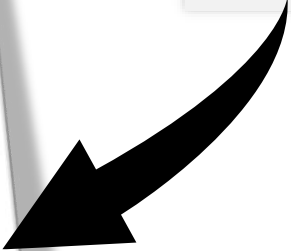
		Aides	LPNs	RNs	Total Nursing
Reported Hours	Actual	29,436.00 <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/>	9,367.25 <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/>	1,857.50 <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/>	40,660.75
Staffing Cost	Current Cost	\$412,104.00 Average Wage \$14.00	\$206,079.50 \$22.00	\$78,015.00 \$42.00	\$696,198.50
<input type="button" value="☑ Update Staff Salary"/>					
Staffing Percent	Current Percent	72%	23%	5%	100%
Reported HRD <small>(Reported Hours / Census / Days)</small>		3.368 3 hrs 22 mins	1.072 1 hr 4 mins	0.213 13 mins	4.652 4 hrs 39 mins
Case-Mix HRD <small>(Based on MDS & PDPM)</small>	simple. Live Case-Mix <small>(Last Updated 04/09/2024)</small>	1.9698235535481978 1 hr 58 mins	0.7515707025662323 45 mins	0.415355996609 <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/>	3.136750252723 <input type="text"/> <input type="button" value="↺"/> <input type="button" value="↻"/> 3 hrs 8 mins
<input type="button" value="⏮ Test Previous Actual"/>	Reported to Case-Mix HRD Ratio <small>(HRD Reported / HRD Case-Mix)</small>	1.710	1.426	0.513	1.483
<input type="button" value="⏮ Test Live Simple Case-Mix"/>	National Average Case-Mix HRD <small>(Mean of national average from 2024 1st Quarter, 2023 4th Quarter, and 2023 3rd Quarter)</small>	2.0915 2 hrs 5 mins	0.798 48 mins	0.44101 26 mins	3.33051 3 hrs 20 mins
Adjusted HRD <input type="button" value="i"/>				0.226 14 mins	4.939 4 hrs 56 mins

Hours Adjusted HRD = (Hours Reported HRD / Hours Case-Mix HRD) * Hours National Average HRD

Latest SimplePBJ Updates



Turnover look-back period added to the Employee Turnover view!
Easily reference the CMS calculation period for the selected quarter.



SimplePBJ™

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



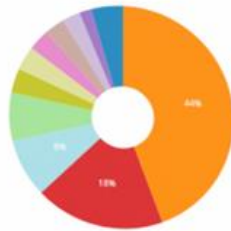
Scan to learn more or
visit simpletc.com/pbj

Bluffview Nursing Home – 2018 3rd Quarter (4/1/2018–6/30/2018)

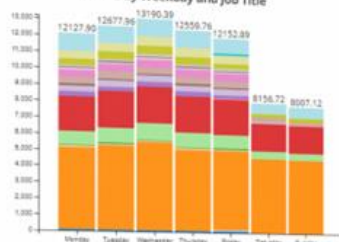
Select Job Codes (20) ▾

- Administrator
- Other Physician
- Certified Nurse Aide
- Registered Nurse Director of Nursing
- Registered Nurse with Administrative Duties
- Registered Nurse
- Licensed Practical/Vocational Nurse
- Pharmacist
- Chaplain
- Occupational Therapist
- Occupational Therapy Assistant
- Physical Therapist
- Physical Therapy Assistant
- Physical Therapy Aide
- Speech/Language Pathologist
- Qualified Activities Professional
- Other Activities Staff
- Qualified Social Worker
- Dentist (optional)
- Housekeeping Service Worker (optional)

Percent Hours by Job Title



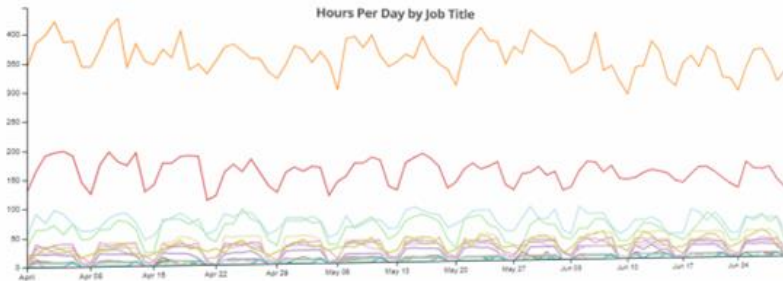
Hours by Weekday and Job Title



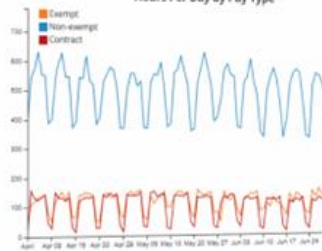
Percent Hours by Pay Type



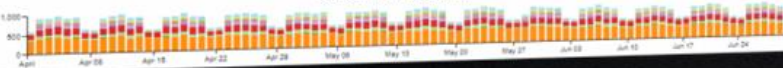
Hours Per Day by Job Title



Hours Per Day by Pay Type



Select Date Range Below



Reset Range | Done



PBJ Consulting:

Full service PBJ review & CMS data submission
PBJ compliance audits & Myers and Stauffer audits

MDS Consulting:

PDPM, CMI, Quality Measures,
Compliance Reviews, Medicare

Education on new PBJ focus areas for state surveys
Education/Orientation for PBJ staff (facility or corporate)



Jolene Johnson

President

jolene@luminatehcc.com



Scan to learn more or
visit luminatehcc.com

Questions



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Thanks for attending!

Recording & slides available here:
www.simpleltd.com/PBJ-Q4-2024

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Resources

<https://www.cms.gov/medicare/provider-enrollment-and-certification/certificationandcompliance/downloads/usersguide.pdf>

<https://oig.hhs.gov/reports-and-publications/workplan/active-item-table.asp>