4 pitfalls to avoid in your PBJ plan

Presented by

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What we’ll cover

• 4 potential pitfalls in your PBJ plan (and how to avoid them)
• Key topics
  – PBJ preparations and timing
  – Gathering (the right) data
  – Creating XML files
  – Submitting/tracking PBJ files
  – Managing CMS reports and validations
  – Creating an end-to-end PBJ process
• PBJ checklist for success
Attendee poll #1

• How far along is your organization in preparing for PBJ compliance?
  – Haven’t yet started (How do you spell PBJ?)
  – Just beginning our preparations
  – Somewhere in the middle
  – Completely prepared and confident
Surveying the PBJ landscape

• What does the road ahead look like?
• Different approaches to same problem
  – Internally developed software system
  – Outsourced system
  – Manual processes
  – PrimeVIEW/SimpleLTC process
• Expect a few bumps in the road
Under-preparing for PBJ requirements

• Registering with CMS
  – Linking via SimpleLTC
• Understand timing
• Training staff on a new tracking process
Gathering incorrect or insufficient data

• Reporting
  – Reporting by calendar day (midnight-to-midnight requirement)
  – What’s the 45-day window?
  – What about all my contractors?
• Creating the census component: When and what do I need?
• Creating a single XML file per facility
Failure to coordinate people and systems

• Manual data collection
  – Inaccurate data
  – Human error & wasted time

• Lack of integration of systems
  – Inefficient workflow

• Lack of coordination of effort
  – Increased risk of penalties
Failure to track/validate CMS submissions

• Manual file submission
  – Impractical
  – Human error
  – CMS VPN limitations

• Limited view of data

• Reporting
  – CMS PBJ reports
Handling PBJ compliance manually

- Core time and attendance data
- Contractor/therapy data
- Census data

Manually compile information

Manually log in to CMS, enter information

Manually download final validations/reports

for each facility
Simplifying the PBJ process

Assemble data + create file

- Core time and attendance data
- Contractor/therapy data
- Census data

Internal system coordination (clinical, time and attendance, timekeeping, etc.)

Transmit files + retrieve reports

- Transmit PBJ file
- Retrieve final validations/reports

.CSV
Attendee poll #2

• Are you currently a user of SimpleLTC and/or primeVIEW software?
  – primeVIEW only
  – SimpleLTC only
  – Both primeVIEW and SimpleLTC
  – Neither primeVIEW nor SimpleLTC
  – Not sure
primeVIEW/SimpleLTC end-to-end workflow

Assemble data + create file

Core time and attendance data
Census data
PBJ only clients enter census info
Contractor/therapy data entered

Enter corrections

Review PBJ info by employee or job
Accept info/create PBJ file
for one or all facilities

Transmit PBJ file
Retrieve final validations/reports

Transmit files + retrieve reports

Accept info/create PBJ file

Review PBJ info by employee or job

+ review system alerts

Assemble data + create file

Prime time and attendance data
Census data
PBJ only clients enter census info
Contractor/therapy data entered
primeVIEW PBJ screens

- Employee Data Entry
- Employee Hrs Entry
- Employee Hrs summary
- Labor Category Mapping
- Export PBJ file

Manual entry option

Data review

Contractual Or Vendors Employee Hours

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Facilities' Regular Employees Hours

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primeVIEW PBJ screens

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<th>primeView Department</th>
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<th>CMS Labor Category</th>
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<td>Therapeutic Services</td>
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<td>Activities</td>
<td>Facility Rec. Mgr</td>
<td>Therapeutic Services</td>
<td>Qualified Activities Professional</td>
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<tr>
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<td>Activities</td>
<td>Hospitality Specialist</td>
<td>Therapeutic Services</td>
<td>Other Activities Staff</td>
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</tbody>
</table>

Facility: [Select Facility]
Year: [Select Year]
Quarter: [Select Quarter]

Download
SimpleLTC PBJ transmission/reporting

Submitting the PBJ file to CMS
(Manually/without PrimeVIEW)

Tracking progress/retrieving reports

Upload your PBJ files
Use this page to upload your PBJ files to CMS. You may upload PBJ files using the upload box to the right. File formats can be .zip or .xml.

Progress Tracker

Upload Time & Facility | Count | Progress Tracker
--- | --- | ---
05-16-2016 at 10:55 AM - Steel Health | | 
05-16-2016 at 09:10 AM - Sunshine Palace Nursing | | 
05-15-2016 at 04:28 PM - Texas Living Nursing | | 
05-15-2016 at 02:28 PM - Wernham Health | |
Attendee poll #3

• Do you need assistance getting your organization linked with CMS for PBJ submission?
  – Yes
  – No
  – Not sure, please contact me
PBJ checklist

✓ Confirm/complete CMS linking process
✓ Contact time and attendance vendor for file creation
✓ Create standard for reporting census information
✓ Create process for agency and contract staff time and emp. ID
✓ Contact contract vendors – how will they provide information?
✓ Test functionality with pre-July 1 data
QUESTIONS & ANSWERS
Thank you for attending!

For more info and a free demo:

www.primecaretech.com/pbj

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