

FREE WEBINAR

Quarterly PBJ Webinar

Answers to your PBJ questions
before the **Nov. 14 deadline**

Q4 2025 Edition

WED, OCT 29 | 1 PM CT

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a Netsmart solution



PBJ SUBMISSION GIVEAWAY

Submit your PBJ early & you could win!

The PBJ deadline is Friday, November 14



Submit your PBJ data through SimplePBJ by midnight ET on Nov. 7 for a chance to win

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

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

Winners announced November 14



YOUR SPEAKERS



Nate Hoard

Senior PBJ Specialist – Simple



Matthew Taylor

Team Lead, Client Success – Simple







Live Poll



How long have you been working on the PBJ process?

- a. Since the beginning of PBJ time!
- b. 3 years or more
- c. 1-3 years
- d. I'm kind of new! Less than 1 year

Agenda

-  PBJ Must-Dos
-  Key Take-Aways from CMS' Latest PBJ Policy Manual
-  EmployeeID Linking
-  Tracking your MDS Census
-  Government Shutdown: PBJ Impact
-  Live Q&A

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

Key Takeaways From CMS' Latest PBJ Policy Manual

Added Specifications in 2025:

-  Nursing homes are expected to run their **CMS Census reports** and check for accuracy prior to every submission deadline.
-  Any single employee should never have more than **22.5** hours submitted for any single day worked.
-  For nursing staff, only hours worked **onsite** can be submitted for PBJ purposes.

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 1.5 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. The top navigation bar includes the SimplePBJ logo, active facility (Sunnyside), and reporting quarter (2023 2nd Quarter (1/1/2023 - 3/31/2023)). The left sidebar contains a menu with options: Home, Assemble Staffing Data (with sub-options: Import New File, Manage Existing Files, Templates, Staff, Shifts, Census), Validate PBJ Data, Predict Five-Star, Submit Report, Reporting Status, Benchmark PBJ, Utilities, Settings, Help, and Admin. The 'Staff' option is highlighted with a red circle. The main content area is titled 'Review & Modify Staff' and includes a sub-menu with 'Facility Staff' and 'EmployeeID Linking' (highlighted with a red circle). The 'EmployeeID Linking' section contains a blue informational box with the following text:

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 informational box, there is a link to 'Download SimplePBJ EmployeeID Linking Template'. Underneath, a section titled 'Select Completed EmployeeID Linking Template (CSV)' features a 'Choose File' button (labeled 'No file chosen') and an 'Upload Completed EmployeeID Linking Template' button.

Keeping up with your CMS Census

Steps to take:



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

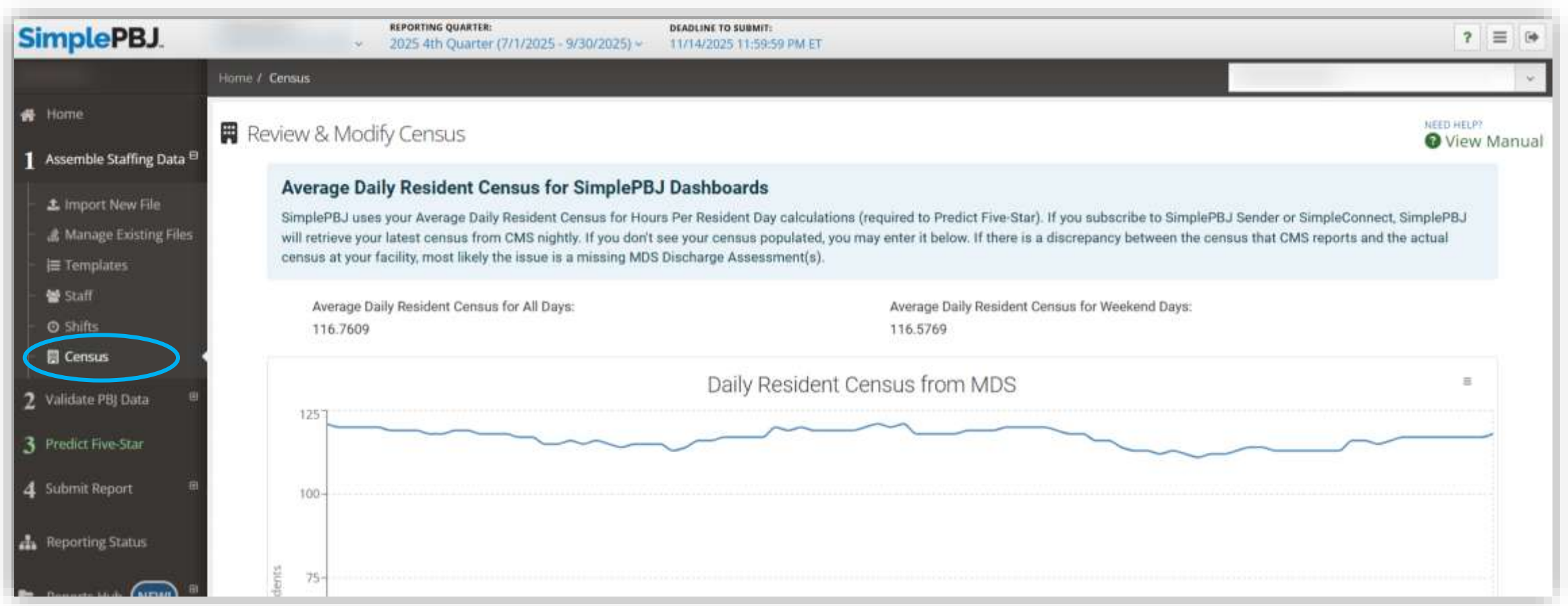


For those residents who are no longer in house, ensure the Entry and Discharge MDS assessments match on MDS: Full Name, Birth date, Gender and social security number AND have been accepted into the state database. If there are discrepancies reach out to your MDS consultant or State RAI automation coordinator.





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

How to Check your MDS Census in SimplePBJ



Government Shutdown: PBJ Impact

 The PBJ submission deadline is still in effect (Nov. 14th) and will **not** be delayed.

 In general, agencies that support the PBJ process are contracted by the government and are not currently affected by the shutdown.

 Submit your PBJ files early, early, early!

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



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Questions

Thanks for attending! Recording & slides will be available here:

simple.health/blog



RESOURCES

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

<https://data.cms.gov/provider-data/dataset/4pq5-n9py>