

Colorado Health Care Policy and Financing  
School Health Services Program  
Public Consulting Group Claiming System  
Coordinator User Guide  
2015



## Table of Contents

I.	Introduction.....	3
II.	Accessing the PCG Claiming System.....	4
	First Time Registration for System Users.....	4
	Resetting Passwords.....	4
	Registered User Login.....	5
III.	Utilizing the Navigation Bar on the Home Screen/Dashboard.....	6
	People.....	6
	Calendar.....	7
	Moments.....	7
	Configuration.....	7
	Reports.....	7
IV.	Utilizing Quarterly Milestone Summary on the Home Screen/Dashboard.....	7
V.	Calendar Completion.....	8
	To enter days off:.....	8
VI.	Entering Shifts (Work schedules/hours).....	10
	To create shifts (work schedules/hours):.....	10
	To Edit Existing Shifts:.....	12
	To Inactivate Existing Shifts.....	13
VII.	Creating and Updating the Staff Pool List.....	14
	Notes on the Time Study Participant List:.....	16
	View, Create, and/or Update the Staff Pool List.....	16
	Filtering the Staff Pool List.....	17
	Adding a New Job Position.....	17
	Filling a New Position with an Existing Staff.....	19
	Deleting a Staff Person and a Position.....	21
	Reactivating a Job Position.....	22
	Allowable Actions During a Quarter.....	22
	Replacing a Staff Person.....	22
	Editing a Staff Person.....	25
	Exporting and Importing the Staff Pool List.....	26
VIII.	Certifying the Staff Pool List.....	30
IX.	Reports.....	31
X.	Moments.....	31
XI.	Participant Screens.....	34
	Email Notifications.....	34
	Participant Moment Access.....	35
	Program Overview and Online Training Material.....	35
XII.	Completing the RMTS Form.....	39
	During Non-Working Day.....	39
	Moment During Working Day.....	40
	Request for Follow-Up.....	43
XIII.	Frequently Asked Questions.....	44

## 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

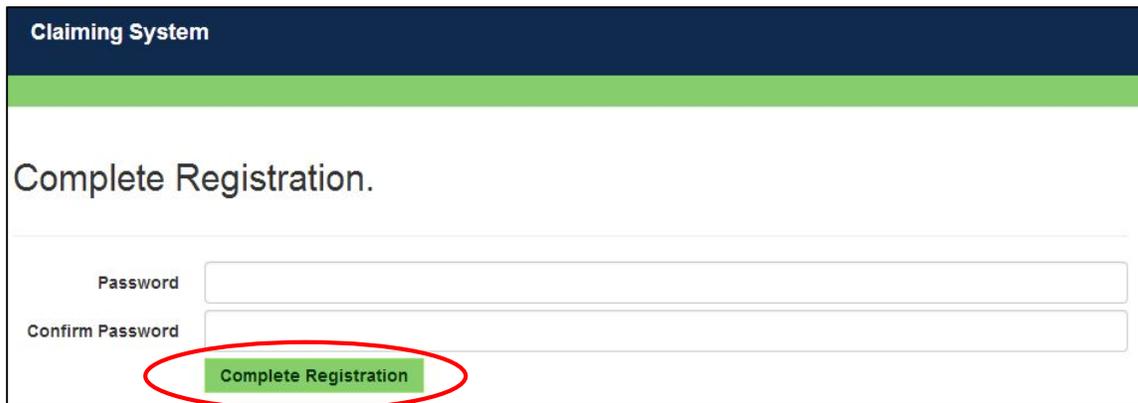
## II. Accessing the PCG Claiming System

### *First Time Registration 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](mailto: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.



Claiming System

Complete Registration.

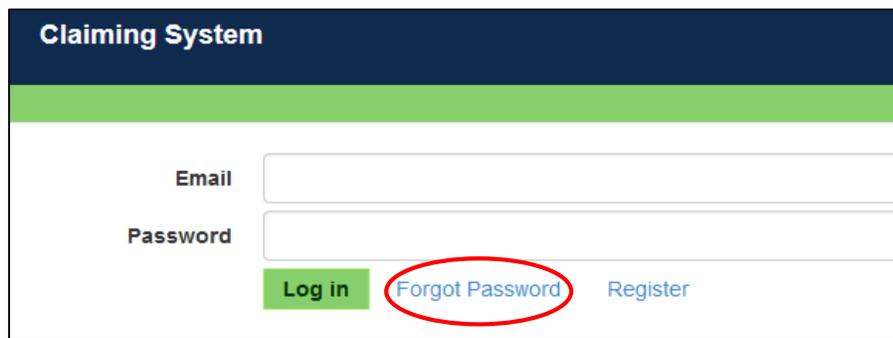
Password

Confirm Password

[Complete Registration](#)

### *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'.



Claiming System

Email

Password

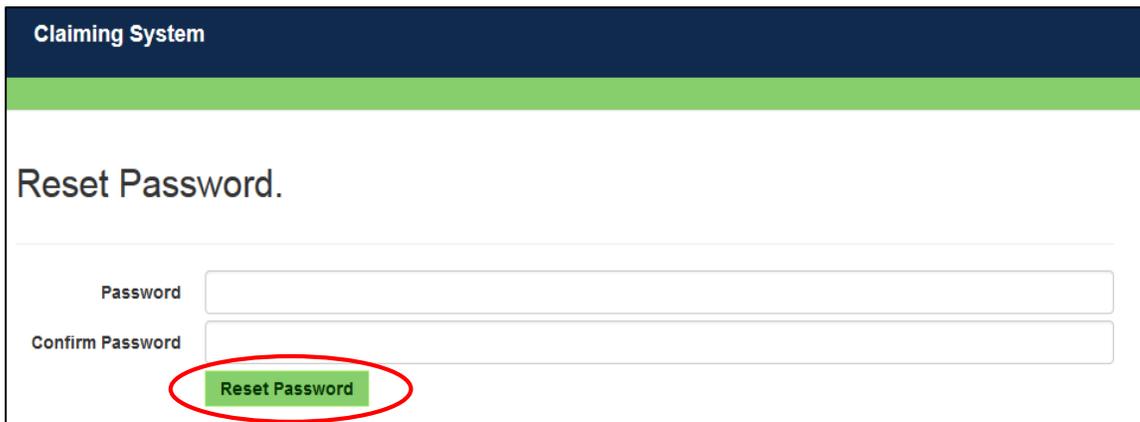
[Log in](#) [Forgot Password](#) [Register](#)

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 screenshot shows a web form with two input fields. The first field is labeled 'Email' with an envelope icon. The second field is labeled '\* Enter the words below' and includes a refresh icon and a speaker icon. Below the second field is a small image of a black object with the number '483' on it. At the bottom of the form are two buttons: 'Forgot Password' (in a blue box) and 'Login'.

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



The screenshot shows a web page titled 'Claiming System' with a green header bar. Below the header, the text 'Reset Password.' is displayed. There are two input fields: 'Password' and 'Confirm Password'. A green button labeled 'Reset Password' is located below the 'Confirm Password' field and is circled in red.

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***

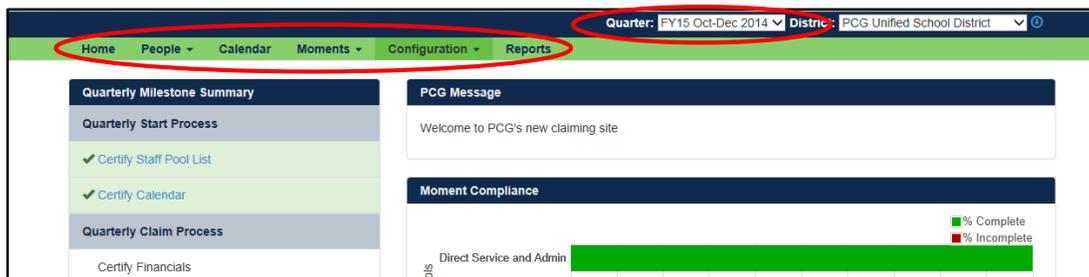
1. To enter the PCG Claiming System website after registering, a coordinator will open an Internet browser and enter <https://claimingsystem.pcgus.com/co>.
2. Enter email and password. Be sure to enter password exactly as created, using appropriate letter cases and symbols.

### 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:

- People
- Calendar
- Moments
- Configuration
- Reports

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).



#### *People*

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)

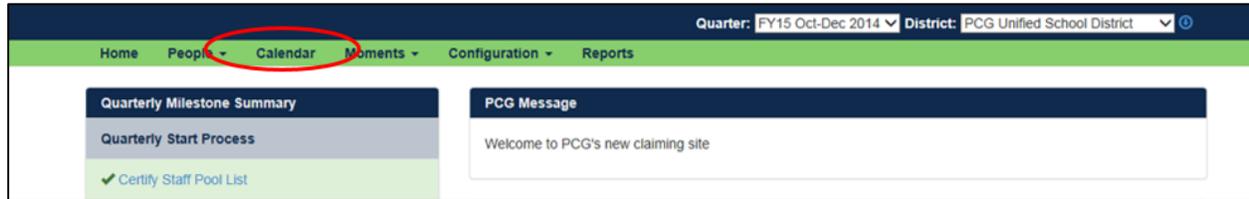
If a district coordinator requires that a system user be added to the system they must contact PCG. Examples of these users:

- *All Users* - District RMTS Coordinator, Medicaid Specialist, District Financial Reporter, etc.... (Please see graphic on next page)
- *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) and administrative activities that support Medicaid school health services. (Please see graphic on next page)
- *Direct Support Positions* – Not applicable



## Calendar

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



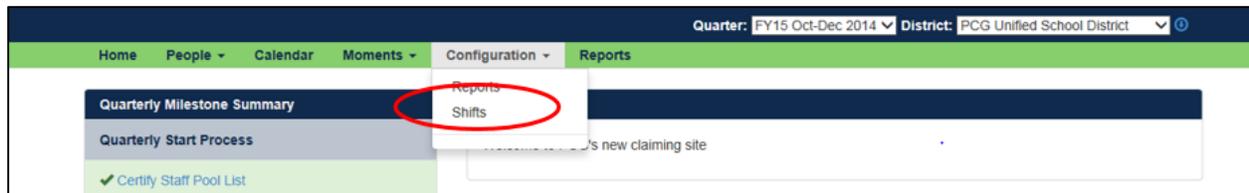
## Moments

The 'Moments' section is where all sampled moments that have already occurred and upcoming moments that are within five (5) days 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)

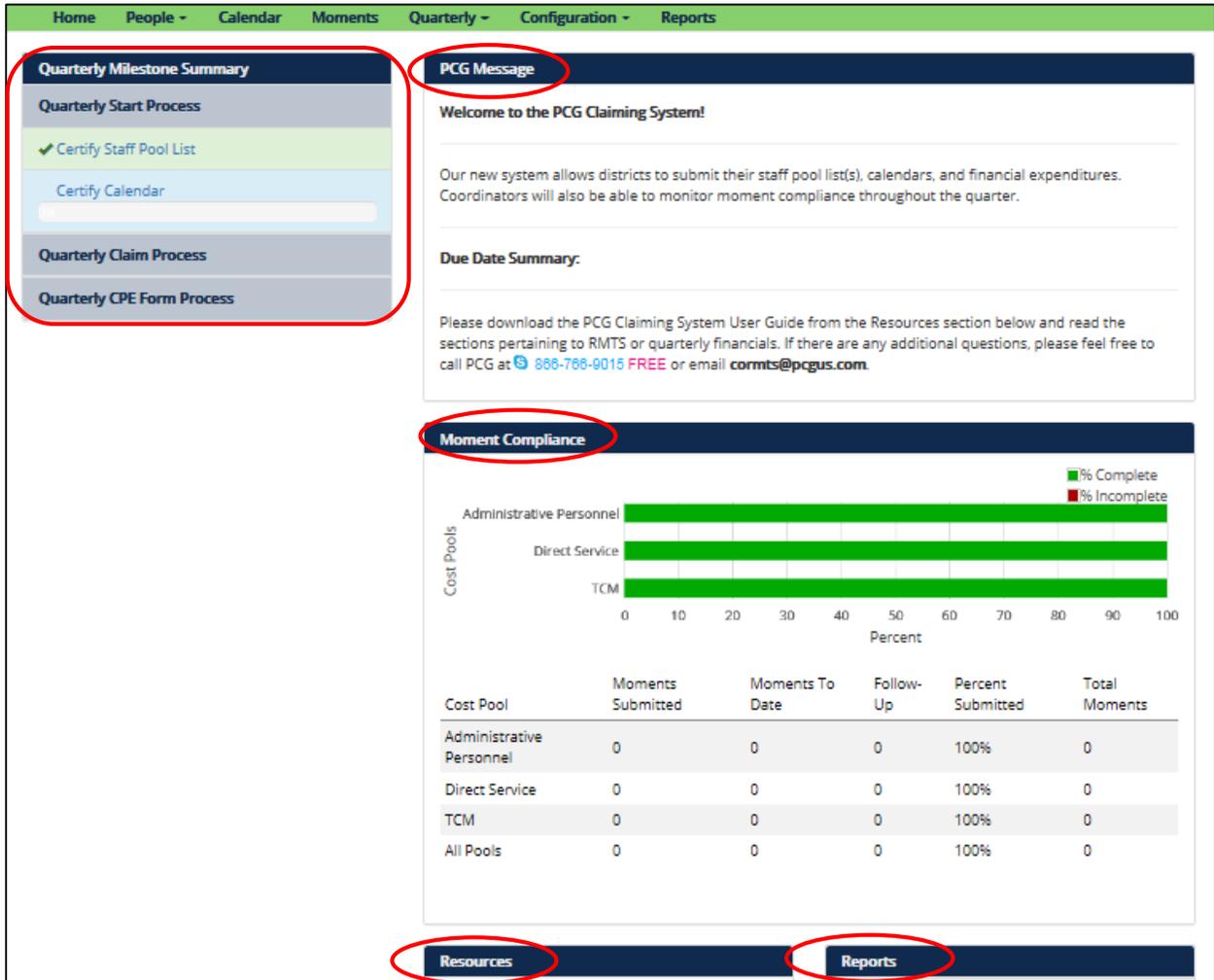


## IV. Utilizing Quarterly Milestone Summary on the Home Screen/Dashboard

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



The screenshot shows the PCG Claiming System interface. At the top, there are navigation tabs: Home, People, Calendar, Moments, Quarterly, Configuration, and Reports. On the left, a sidebar titled 'Quarterly Milestone Summary' contains links for 'Quarterly Start Process', 'Certify Staff Pool List' (with a checkmark), 'Certify Calendar', 'Quarterly Claim Process', and 'Quarterly CPE Form Process'. The main content area features a 'PCG Message' section with a welcome message and a 'Due Date Summary' section with contact information. Below this is a 'Moment Compliance' section with a bar chart showing 100% completion for Administrative Personnel, Direct Service, and TCM. A table below the chart provides detailed data for each cost pool.

Cost Pool	Moments Submitted	Moments To Date	Follow-Up	Percent Submitted	Total Moments
Administrative Personnel	0	0	0	100%	0
Direct Service	0	0	0	100%	0
TCM	0	0	0	100%	0
All Pools	0	0	0	100%	0

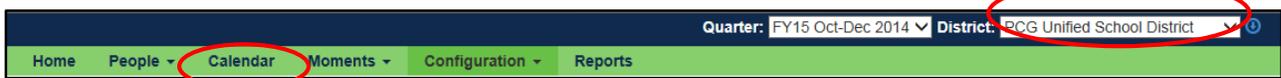
At the bottom of the interface, there are buttons for 'Resources' and 'Reports'.

## 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.**

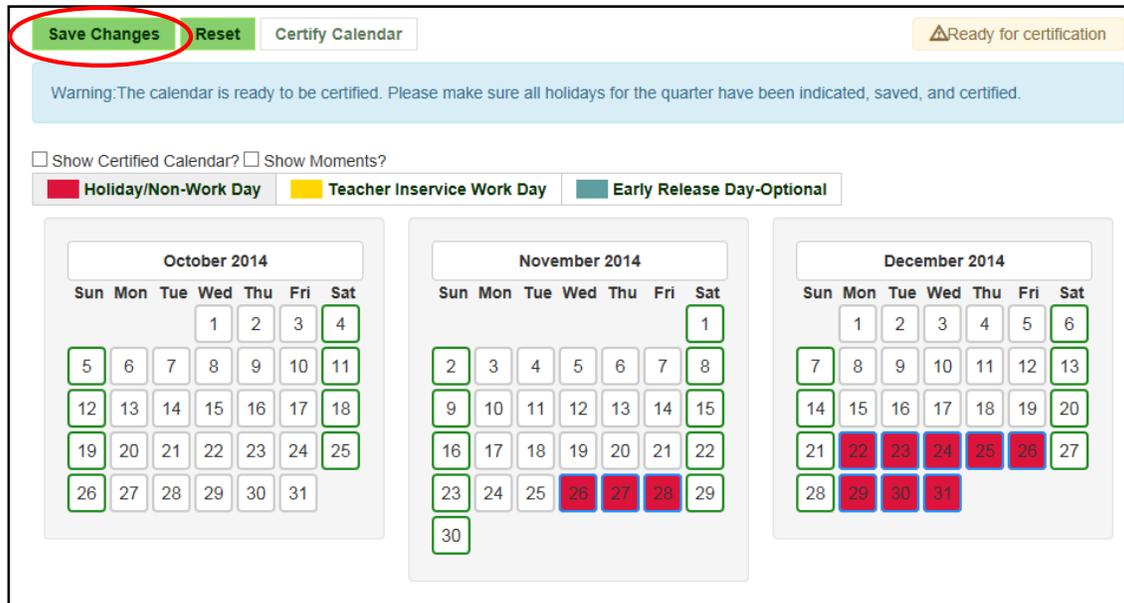
*To enter days off:*

1. Click the ‘Calendar’ link at the top of the home page.

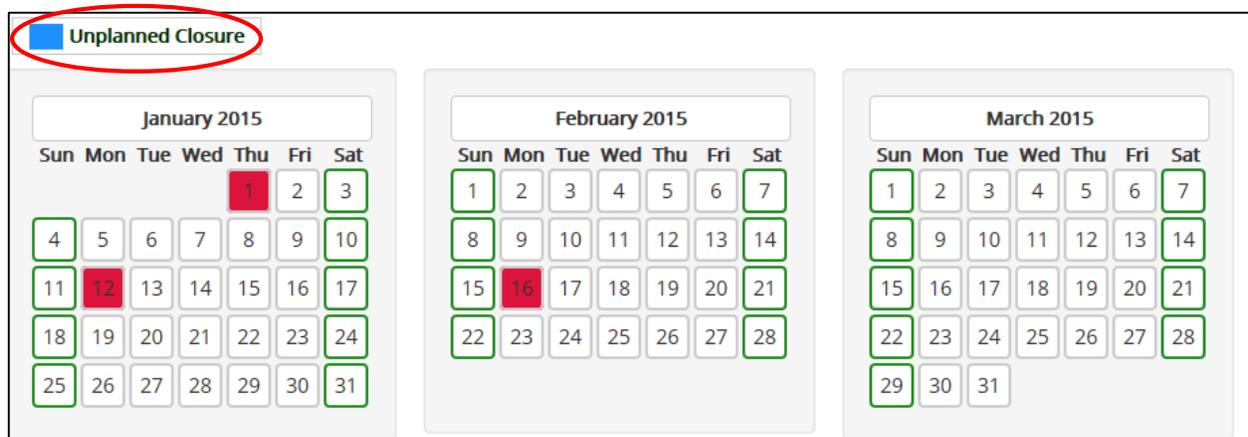


The screenshot shows the navigation bar of the PCG Claiming System. The 'Calendar' link is highlighted with a red circle. The 'Quarter' is set to 'FY15 Oct-Dec 2014' and the 'District' is 'PCG Unified School District'.

- 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 unexpected school closing due to a non-scheduled school closure that affects attendance such as weather related issue, water main break, or other unplanned emergency situation. (Please see graphic on next page)

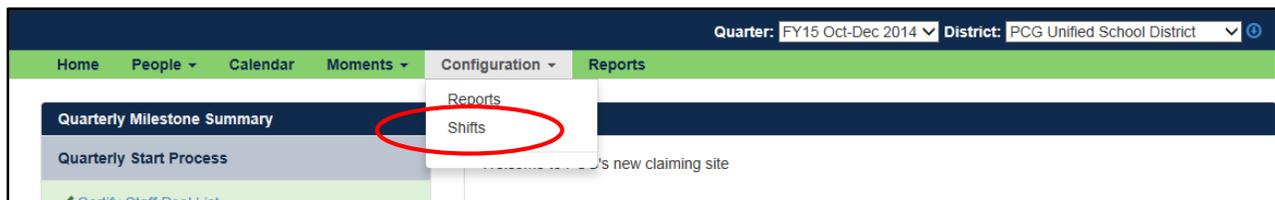


## VI. Entering Shifts (Work schedules/hours)

Not every participant on the SPL begins and ends their work day 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 selected 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.’



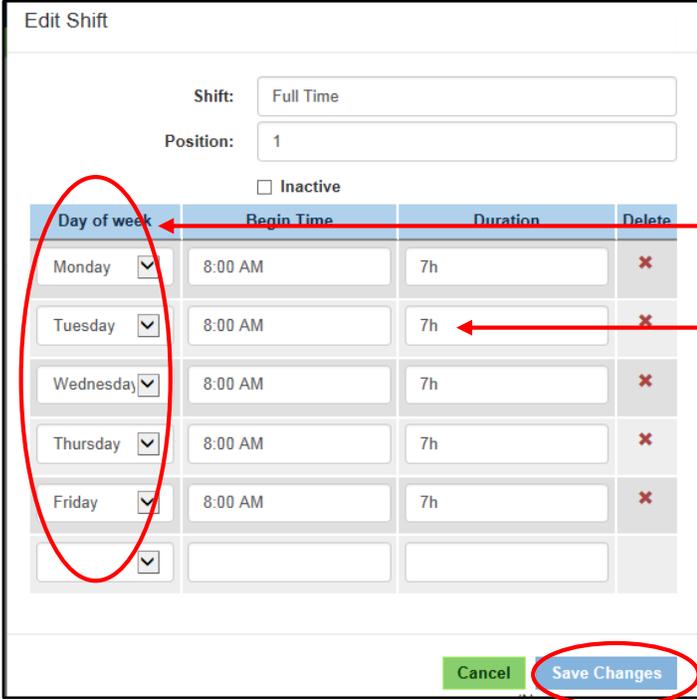
3. Type in a Name for the shift being created. Naming conventions should be easy to identify and meaningful so that a correct shift can be selected for a staff person. If there are multiple schools within the district, each school can have a specific shift with a start time and duration. (see image below)

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 duration of the shift in the hours and minutes using the following format:
  - #h #m (substituting # for the actual duration of hours and minutes)

Duration is the length in time of the shift which includes lunch (i.e. 7hrs). The system will determine the ending time based on the start time entered in step 6 and the duration of the shift entered in this step.
8. 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.



Edit Shift

Shift: Full Time

Position: 1

Inactive

Day of week	Begin Time	Duration	Delete
Monday <input type="checkbox"/>	8:00 AM	7h	<input type="checkbox"/>
Tuesday <input type="checkbox"/>	8:00 AM	7h	<input type="checkbox"/>
Wednesday <input type="checkbox"/>	8:00 AM	7h	<input type="checkbox"/>
Thursday <input type="checkbox"/>	8:00 AM	7h	<input type="checkbox"/>
Friday <input type="checkbox"/>	8:00 AM	7h	<input type="checkbox"/>
<input type="checkbox"/>			

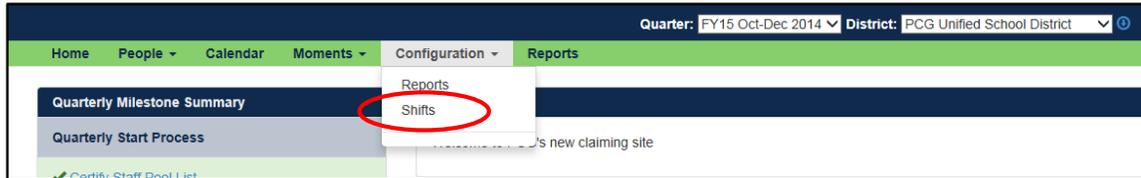
Cancel Save Changes

District Size	Total Staff Pool List Size	Maximum Shifts
<b>Small</b>	1 to 45	4
<b>Medium</b>	46 to 199	7
<b>Large</b>	200+	10

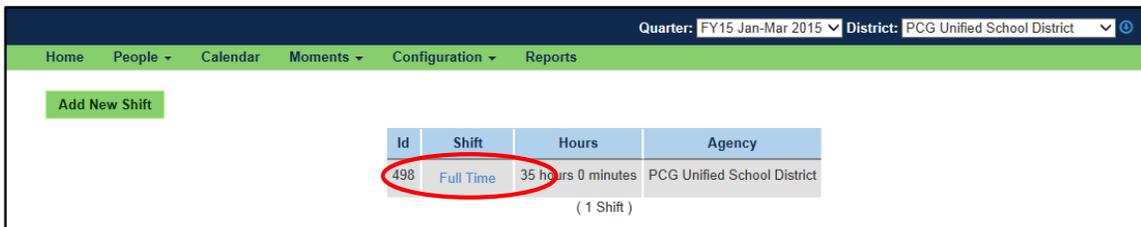
### To Edit Existing Shifts:

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 duration 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.

Edit Shift

Shift:

Position:

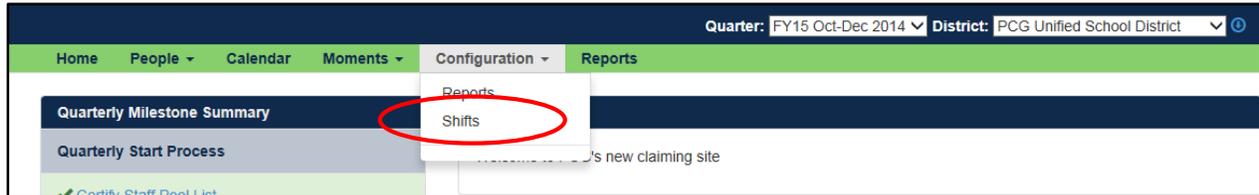
Inactive

Day of week	Begin Time	Duration	Delete
Monday <input type="checkbox"/>	<input type="text" value="8:00 AM"/>	<input type="text" value="7h"/>	<input checked="" type="checkbox"/>
Tuesday <input type="checkbox"/>	<input type="text" value="8:00 AM"/>	<input type="text" value="7h"/>	<input checked="" type="checkbox"/>
Wednesday <input type="checkbox"/>	<input type="text" value="8:00 AM"/>	<input type="text" value="7h"/>	<input checked="" type="checkbox"/>
Thursday <input type="checkbox"/>	<input type="text" value="8:00 AM"/>	<input type="text" value="7h"/>	<input checked="" type="checkbox"/>
Friday <input type="checkbox"/>	<input type="text" value="8:00 AM"/>	<input type="text" value="7h"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

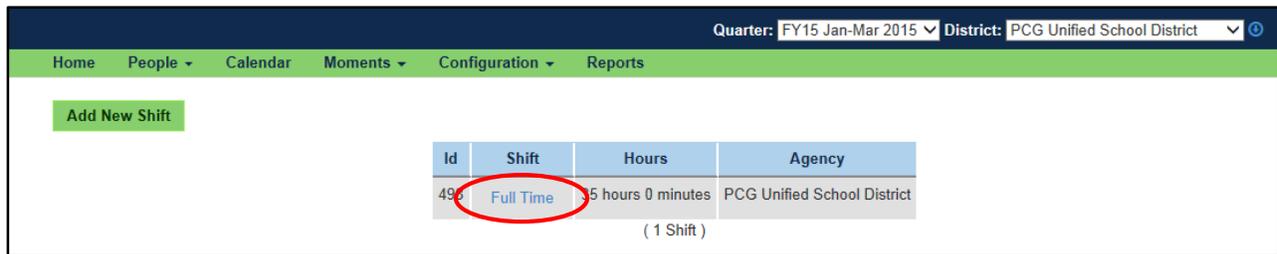
### To Inactivate Existing Shifts

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

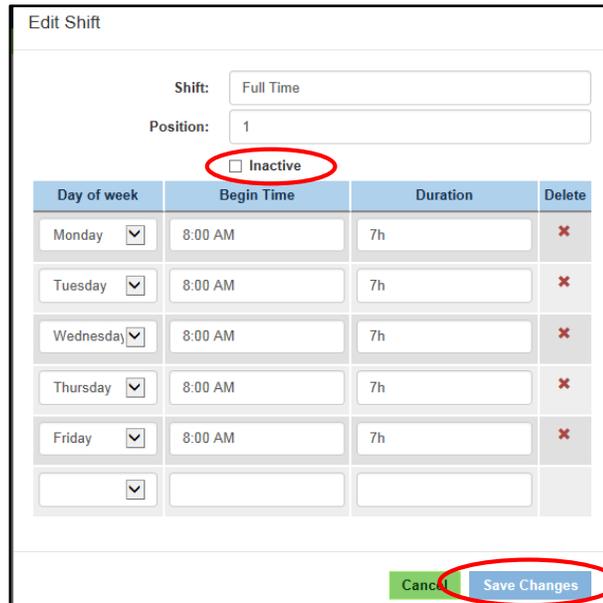
1. Go to the 'Configuration' drop down on the home screen and select 'Shift.'



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. (Please see graphic on next page)



The screenshot shows the 'Edit Shift' form. The 'Shift' field is set to 'Full Time' and the 'Position' field is set to '1'. The 'Inactive' checkbox is checked and circled in red. Below the form is a table with columns for 'Day of week', 'Begin Time', 'Duration', and 'Delete'. At the bottom right, the 'Save Changes' button is circled in red.

Shift: Full Time  
Position: 1  
 Inactive

Day of week	Begin Time	Duration	Delete
Monday	8:00 AM	7h	✕
Tuesday	8:00 AM	7h	✕
Wednesday	8:00 AM	7h	✕
Thursday	8:00 AM	7h	✕
Friday	8:00 AM	7h	✕

Cancel Save Changes

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, Targeted Case Management (TCM), and Administrative 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 or IFSP. Also, staff who are performing administrative claiming activities that include administrative and outreach activities to students and/or their families. Also, cost pool 1 will include the respective costs for these staff. These costs include staff time spent on billing activities related to direct services. Examples of staff included in cost pool 1 include:

- Audiologist
- Health Technician
- Licensed Counselor
- Nurse Aide
- Nurse, LPN
- Nurse, RN
- Occupational Therapist
- Occupational Therapy Assistant (Technician)
- Orientation Mobility Specialist
- Personal Care Aide/Teacher's Aide
- Physical Therapist
- Physical Therapy Assistant (Technician)
- Physician
- Psychiatrist
- Psychologist
- Social Worker
- Special Education Teacher
- Speech/Language Pathologist
- Speech/Language Pathologist candidate
- Supervised Audiology Candidate
- Speech/Language Impairment Teacher

**Cost Pool 2 – TCM** – Cost Pool 2 is comprised of TCM staff that identifies special health problems and addresses needs that affect a student’s ability to learn, assists the student to gain and coordinate access to a broad range of medically necessary services covered under the Medicaid program and ensures that the student receives effective and timely services appropriate to their needs, and also the respective costs for these staff. These costs include staff time spent on billing activities related to TCM. Examples of staff included in cost pool 2 include:

- Audiologist
- Health Technician
- Licensed Counselor
- Nurse Aide
- Nurse, LPN
- Nurse, RN
- Occupational Therapist
- Occupational Therapy Assistant (Technician)
- Orientation Mobility Specialist
- Personal Care Aide/Teacher’s Aide
- Physical Therapist
- Physical Therapy Assistant (Technician)
- Physician
- Psychiatrist
- Psychologist
- Social Worker
- Special Education Teacher
- Speech/Language Pathologist
- Speech/Language Pathologist candidate
- Supervised Audiology candidate

**Cost Pool 3 – Administrative 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. Also, cost pool 3 will 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
- Pupil Support – Technician
- Non-licensed Orientation & Mobility Specialist
- Non-licensed Psychologist
- Non-licensed Social Worker
- Nurses – Non DS or TCM
- School Bilingual Assistant
- School Counselor
- Special Education Administrator
- Special Education – Support Teacher
- Special Education Teacher Aide – non DS or TCM
- Special Education Teacher – non DS or TCM

**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 one 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 in order 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.

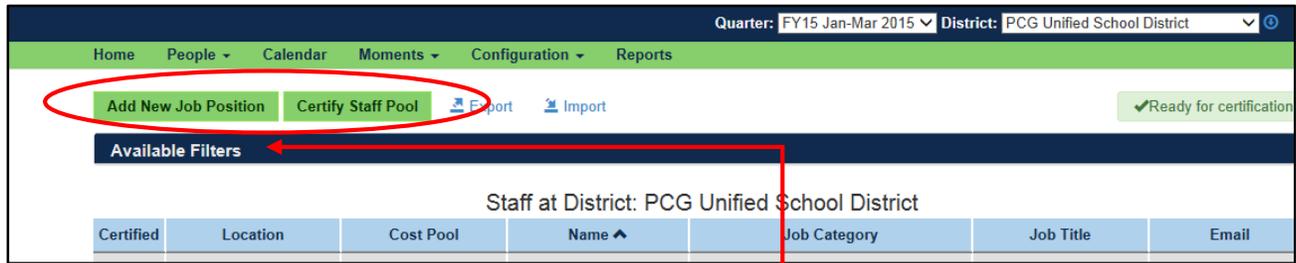
***View, Create, and/or Update the Staff Pool List***

To view, create, and/or update the SPL, click on the ‘People’ 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 ‘People’ dropdown. All current active job positions included in the staff pool list will appear with the following information: (Please see graphic on next page)

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



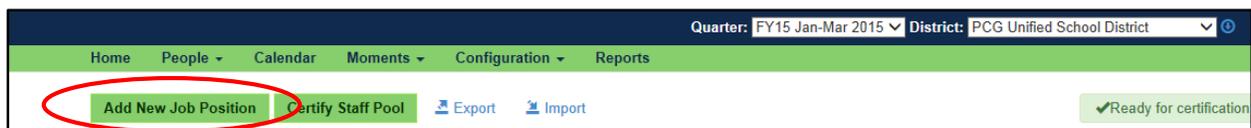
### *Filtering the Staff Pool List*

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
- Employment Type: A drop down menu to select Salaried or Contracted
- Job Title: Job title used by the district to describe the position

Create New Job Position

Location:  (Required)

Cost Pool:  (Required)

Job Category:  (Required)

Shift Type:  (Required)

Job Title:

- 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.**

<b>Action:</b>	Fill With Existing
	Fill With New
	Create as Vacancy

- Complete the new participant information by entering:
  - 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
  - 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

*\*Denotes Required fields*

Create new staff:

Start Date:

Email:

(Required)

No Email

Employee ID:

First Name:

(Required)

Middle Name:

Last Name:

(Required)

Suffix:

Phone:

Email CC Person:

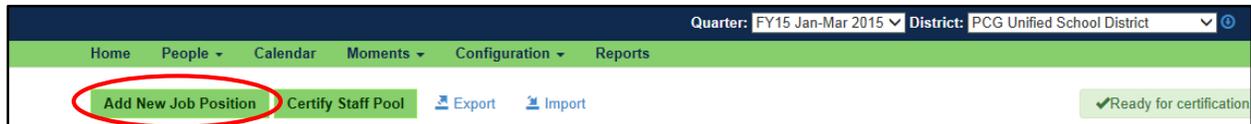
- Click 'Create New Job Position' or cancel to abort new job position and return to the SPL

Cancel
Create New Job Position

### 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

**Create New Job Position**

**Cost Pool:**  (Required)

**Job Category:**  (Required)

**Shift Type:**  (Required)

**Employment Type:**  (Required)

**Job Title:**

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 inactive 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.

<b>Action:</b>	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:

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	<input type="button" value="Fill"/>
Demo LEA		krogers99	Rogers, Kenny	No	<input type="button" value="Fill"/>
Demo LEA	ndrew@123pcgus.com		Drew, Nancy	No	<input type="button" value="Fill"/>
Demo LEA	plong@123pcgus.com		Long, Pippi	No	<input type="button" value="Fill"/>
	dkellog@123pcgus.com		Kellog, Denny	Yes	<input type="button" value="Fill"/>

5. 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.

Start Date:

Email: dcurry@test.com

Employee ID:

Name: Curry, Darren T

Email CC Person: (none)

Add Another?

6. Then select ‘Create New Job Position’ to save it.

**Deleting a Staff Person and a Position**

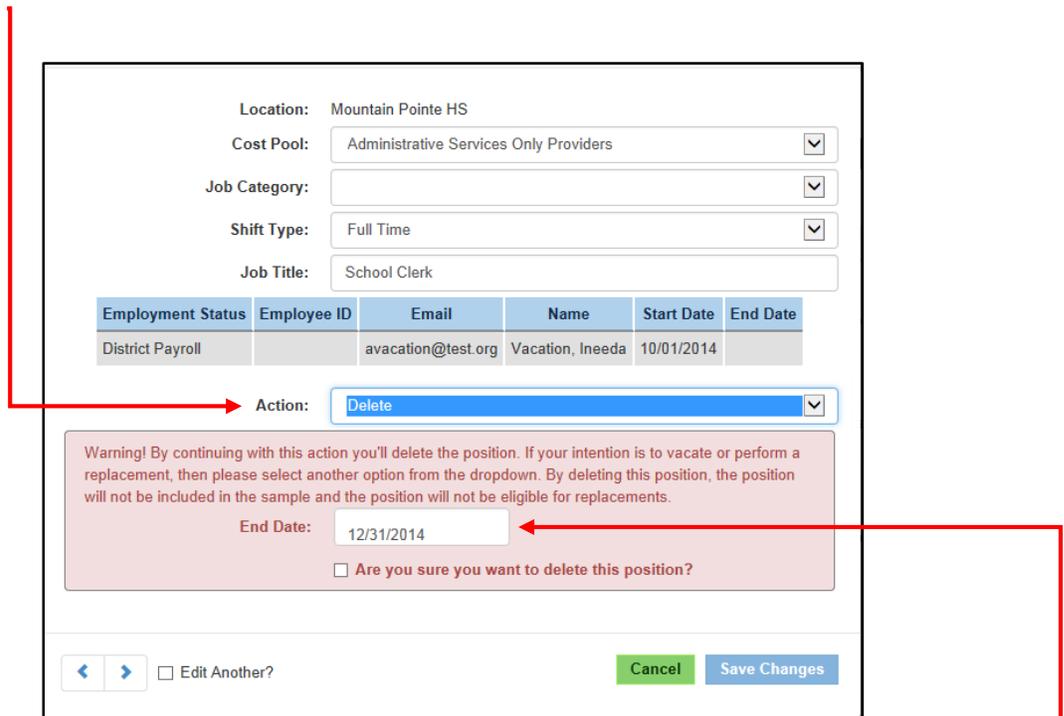
SPL's are updated quarterly. If a participant is no longer employed within the district or should no longer be included on the SPL for the upcoming quarter, they should be removed, or 'deleted' from the SPL.

1. Select the staff person and position to delete.

Staff at District: PCG Unified School District						
Certified	Location	Cost Pool	Name	Job Category	Job Title	Email
	Boulder Creek ES	Admin	Witt, Ryan	School Counselors	Counselor	rwitt@pcgus.com ✓
	Mountain Pointe HS	Admin	Vacation, Ineeda	Interpreters & Interpreter Assistants	School Clerk	avacation@test.org
	Boulder Creek ES	Direct Service and Admin	Sparrow, Jack	Licensed Physical Therapists	PT	jsparrow@test.com
	Centennial MS	Direct Service and Admin	Smith, Susan	Licensed Clinical Social Workers	School Social Worker	ssmith@test.com
	Centennial MS	Direct Service and Admin	Sanchez, Steve	Licensed Occupational Therapists	OT	ssanchez@pcgus.com
	Mountain Pointe HS	Admin	Pavelek, Lisa	Special Education Administrators	Special Education Director	lpavelek@test.com

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. Delete



Location: Mountain Pointe HS  
 Cost Pool: Administrative Services Only Providers  
 Job Category:  
 Shift Type: Full Time  
 Job Title: School Clerk

Employment Status	Employee ID	Email	Name	Start Date	End Date
District Payroll		avacation@test.org	Vacation, Ineeda	10/01/2014	

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: 12/31/2014

Are you sure you want to delete this position?

3. The 'End Date' entered should be the last day of 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.

Location: Mountain Pointe HS

Cost Pool: Administrative Services Only Providers

Job Category:

Shift Type: Full Time

Job Title: School Clerk

Employment Status	Employee ID	Email	Name	Start Date	End Date
District Payroll		avacation@test.org	Vacation, Ineeda	10/01/2014	

Action:

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:

Are you sure you want to delete this position?

Edit Another?

### ***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 Quarter***

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 make a selection:
  - 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

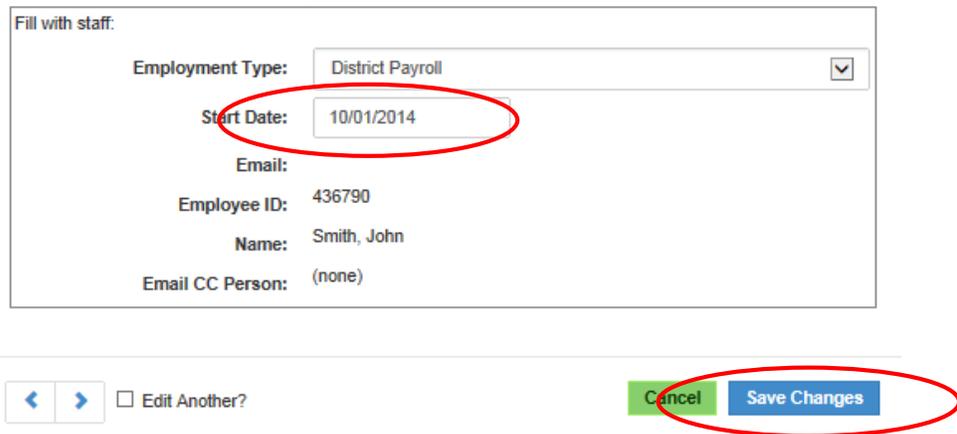
All staff, both inactive and active, will appear in the search results based on the criteria selected. ‘Yes’ under the column header ‘inactive’ means the participant is inactive and can be selected to fill the position. ‘No’ in the ‘inactive’ column means the staff is active in the district. Only a participant 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. (Please see graphic on next page)

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.



Fill with staff:

Employment Type: District Payroll

Start Date: 10/01/2014

Email:

Employee ID: 436790

Name: Smith, John

Email CC Person: (none)

Edit Another?

Cancel Save Changes

*c. Replace with New*

Complete the new staff person information by entering:

- 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 – 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

*(See graphic on next page)*

Create new staff:

Start Date:

Email:   
(Required)

No Email

Employee ID:

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



### ***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.***

*(See graphic on next page)*

Create New Job Position

Location:  ▼  
(Required)

Cost Pool:  ▼  
(Required)

Job Category:  ▼  
(Required)

Shift Type:  ▼  
(Required)

Job Position Id:

Job Title:

Description:

Action:  ▼

---

Create new staff:

Start Date:

End Date:

Employment Type:  ▼  
(Required)

Email:   
(Required)

Employee ID:

First Name:   
(Required)

Middle Name:

Last Name:   
(Required)

Suffix:

Phone:

Email CC Person:  ▼

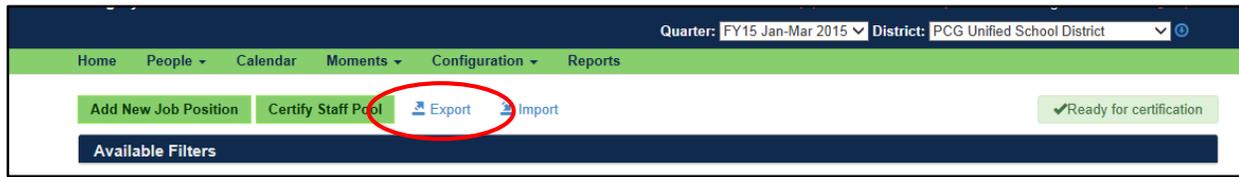
Add Another?

- 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

CostPool.Name	Agency.Name	JobCategory.Name	ShiftType.Name	EmploymentStatus.Name	Email	EmployeeId	FirstName	MiddleName	LastName	BeginDate	EndDate
Direct Service	Boulder Creek ES	Licensed Speech/Language Therapist	Full Time	District Payroll	jones@test.com		Thomas	J	Jones	10/1/2014	
Direct Service	Centennial MS	Licensed Clinical Social Workers	Full Time	District Payroll	ssmith@test.com	PCG1234667	Susan		Smith	10/5/2014	
Administrative Personnel	Mountain Pointe HS	Special Education Administrators	Full Time	District Payroll	lpavelek@test.com		Lisa		Pavelek	10/1/2014	
Direct Service	Centennial MS	Licensed Occupational Therapists	Full Time	Contractor	ssanchez@test.com		Steve		Sanchez	10/1/2014	
Direct Service	Mountain Pointe HS	School Nurses, RN	Full Time	District Payroll	soconnell@test.com		Stephanie		O'Connell	10/1/2014	
Administrative Personnel	Boulder Creek ES	School Counselors	Full Time	District Payroll	rwitt@test.com		Ryan		Witt	10/1/2014	
Administrative Personnel	Centennial MS	Health Services Special Education Teachers	Full Time	District Payroll	lobb@test.com		Lori		Bobb	10/1/2014	
Direct Service	Boulder Creek ES	Licensed Physical Therapists	Full Time	Contractor	jsparrow@test.com		Jack		Sparrow	10/1/2014	
Direct Service	Boulder Creek ES	Licensed Physical Therapists Assistants	Full Time	District Payroll	rgraine@test.com		Rachel		Greene	10/1/2014	
Administrative Personnel	Mountain Pointe HS	Interpreters & Interpreter Assistants	Full Time	District Payroll	avacation@test.com		Ineeda		Vacation	10/1/2014	

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

- s. 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)
  - t. End Date – When adding a new participant this field will be blank
  - u. 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	JobCategory.Name	ShiftType.Name	EmploymentStatus.Name	Email	EmployeeId	FirstName	MiddleName	LastName	BeginDate	EndDate
Direct Service	Boulder Creek ES	Licensed Speech/Language Therapist	Full Time	District Payroll	jones@test.com		Thomas	J	Jones	10/1/2014	10/25/2014
Direct Service	Centennial MS	Licensed Clinical Social Workers	Full Time	District Payroll	ssmith@test.com	PCG1234667	Susan		Smith	10/5/2014	
Administrative Personnel	Mountain Pointe HS	Special Education Administrators	Full Time	District Payroll	lpavelek@test.com		Lisa		Pavelek	10/1/2014	
Direct Service	Centennial MS	Licensed Occupational Therapists	Full Time	Contractor	ssanchez@test.com		Steve		Sanchez	10/1/2014	
Direct Service	Mountain Pointe HS	School Nurses, RN	Full Time	District Payroll	soconnell@test.com		Stephanie		O'Connell	10/1/2014	
Administrative Personnel	Boulder Creek ES	School Counselors	Full Time	District Payroll	rwitt@test.com		Ryan		Witt	10/1/2014	
Administrative Personnel	Centennial MS	Health Services Special Education Teachers	Full Time	District Payroll	lobb@test.com		Lori		Bobb	10/1/2014	
Direct Service	Boulder Creek ES	Licensed Physical Therapists	Full Time	Contractor	jsparrow@test.com		Jack		Sparrow	10/1/2014	
Direct Service	Boulder Creek ES	Licensed Physical Therapists Assistants	Full Time	District Payroll	rgreene@test.com		Rachel		Greene	10/1/2014	
Administrative Personnel	Mountain Pointe HS	Interpreters & Interpreter Assistants	Full Time	District Payroll	avacation@test.com		Ineeda		Vacation	10/1/2014	

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



The screenshot shows the 'Import Staff Pool' form. It has an 'Import File:' label followed by a text input field and a 'Browse...' button. The 'Browse...' button is circled in red. At the bottom right, there are 'Close' and 'Upload' buttons, with the text '(No changes yet)' below them.

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



The screenshot shows the 'Import Staff Pool' form. The 'Import File:' field is now populated with a file name. The 'Upload' button is circled in red. The 'Close' button and '(No changes yet)' text are still visible at the bottom right.

- 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).

Import Staff Pool

Please review the log below. If these are the expected results, then confirm the log and commit.

SPL Import Log:

Header checks passed

Time Taken: 351 ms  
Total Records in import: 16  
Number of Error Records: 0  
Number of records successfully uploaded: 16  
=====

Time Taken estimating counts: 6 ms  
Total Rows: 16  
Estimated Same as DB, no action: 16  
Estimated Inserts: 0  
Estimated Updates: 0  
Estimated Errors: 0

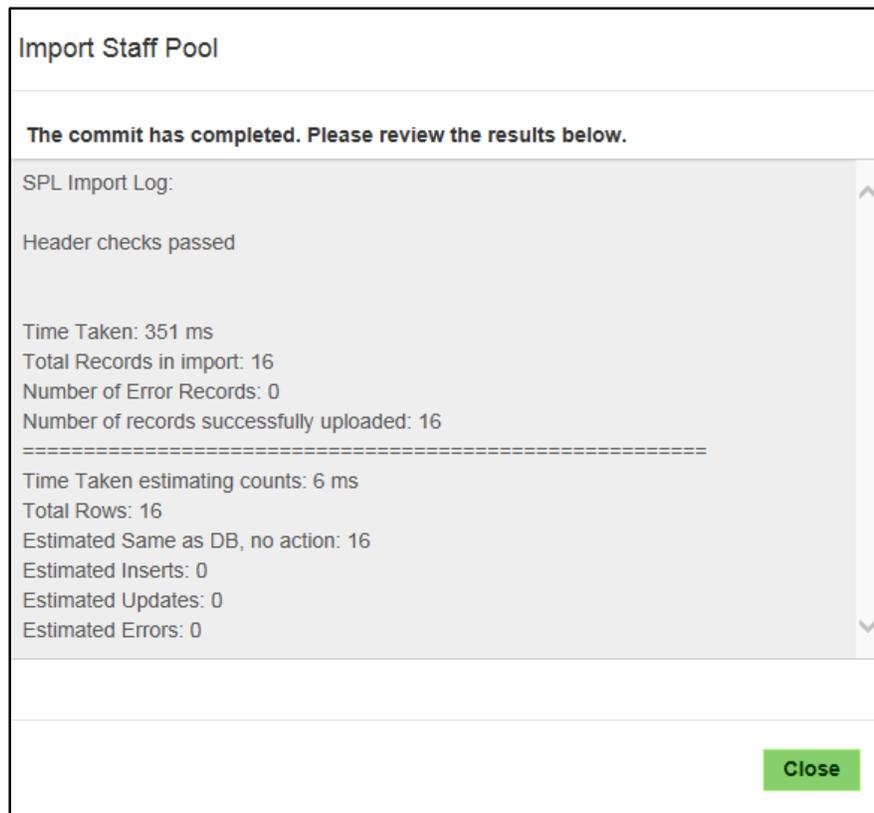
I have reviewed and verified the log

[Close](#) [Commit](#)

- 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

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.

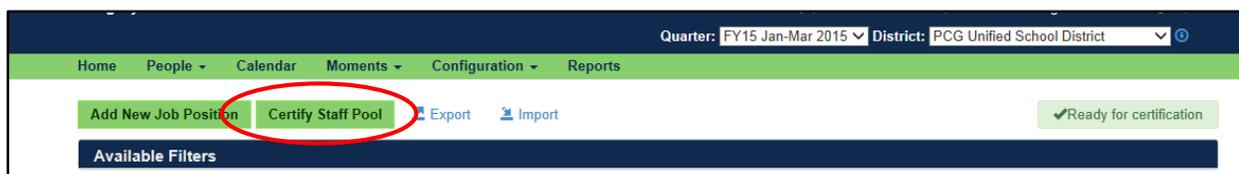
6.



### 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.
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 list 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 snap shot 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
- **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
- **Inactive Participants** - Displays all participants who are inactive at the time of running the report.

## X. Moments

All sampled moments that have already occurred and upcoming moments that are within five (5) days of the sampled moment can be found by selecting the 'Moments' dropdown option from the home screen and then selecting 'All'. **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.



Status	Name	Cost pool	Position	Moment ▲	Submit	Print	Reset	Send Link
⚠	Gable, Clark	Admin	Non-licensed Social Worker	06/02 8:14AM (MST)			✖	🔄
⚠	Harrison, Jamey	Direct	Physical Therapist	06/02 9:14AM (MST)			✖	🔄
⚠	Grant, Cary	Admin	Interpreter Assistant	06/02 9:18AM (MST)			✖	🔄
🔍	Heston, Charlton	Admin	School Counselor	06/02 10:01AM (MST)	06/02 12:56PM (MST)		✖	
⚠	Bobbb, Lori	Direct	Psychologist	06/02 11:03AM (MST)			✖	🔄
⚠	Gielgud, John	Admin	Interpreter Assistant	06/02 11:16AM (MST)			✖	🔄

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. (Please see graphic on next page)

**Available Filters (filtered)**

First Name:

Last Name:

Email:

Cost Pool:

Job Category:

Code:

Status:

Moment Date Range

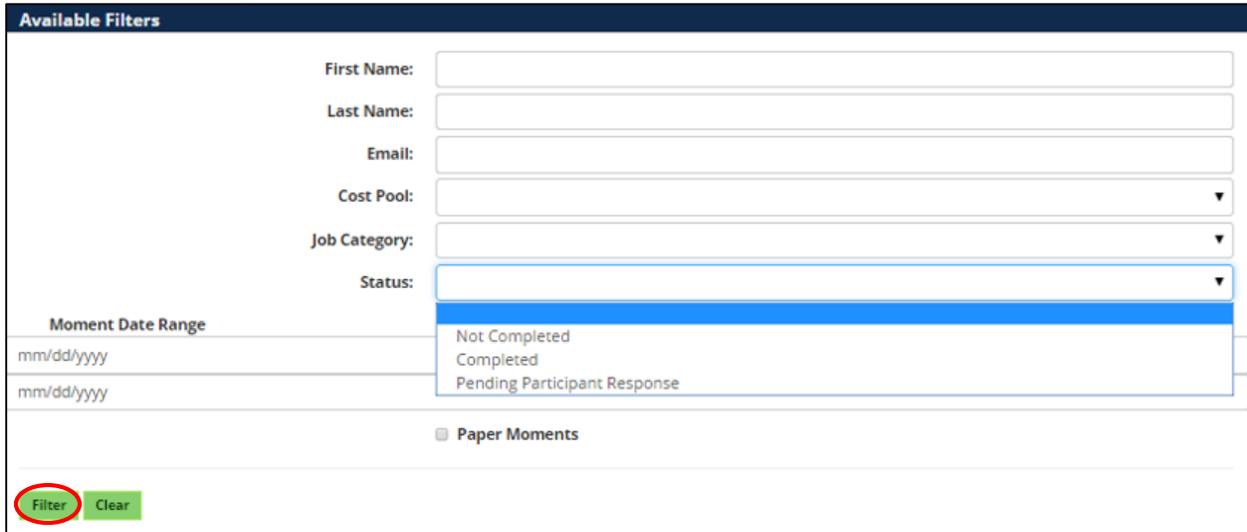
Paper Moments

Status	Name	Cost pool	Position	Moment ▲	Submit	Print	Reset	Send Link
	Bobb, Lori	Direct	Psychologist	06/02 11:03AM (MST)	<input type="button" value="Submit"/>	<input type="button" value="Print"/>	<input type="button" value="Reset"/>	<input type="button" value="Send Link"/>
	Bobb, Lori	Direct	Psychologist	06/02 12:45PM (MST)	<input type="button" value="Submit"/>	<input type="button" value="Print"/>	<input type="button" value="Reset"/>	<input type="button" value="Send Link"/>

( 2 Entries )

**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. (Please see graphic on next page)

- **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.



**Available Filters**

First Name:

Last Name:

Email:

Cost Pool:

Job Category:

Status:

Moment Date Range

mm/dd/yyyy

mm/dd/yyyy

Paper Moments

**Filter** **Clear**

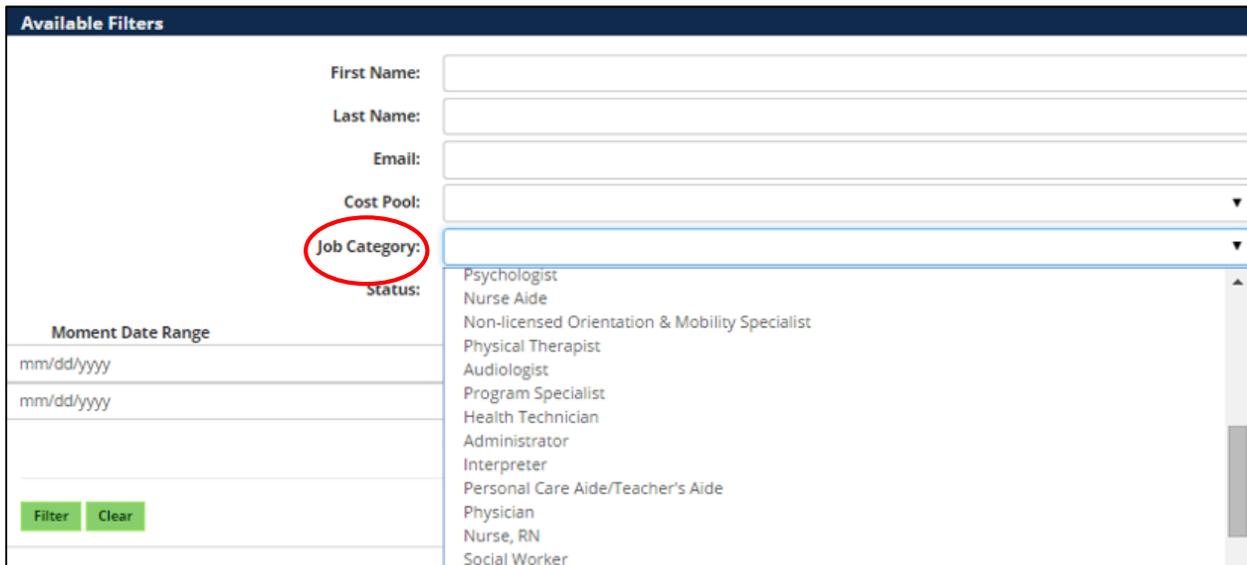
Select desired status filter option and click 'Filter' to view the status of the forms.

\* Depending on 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'.



**Available Filters**

First Name:

Last Name:

Email:

Cost Pool:

**Job Category:**

Status:

Moment Date Range

mm/dd/yyyy

mm/dd/yyyy

**Filter** **Clear**

- Psychologist
- Nurse Aide
- Non-licensed Orientation & Mobility Specialist
- Physical Therapist
- Audiologist
- Program Specialist
- Health Technician
- Administrator
- Interpreter
- Personal Care Aide/Teacher's Aide
- Physician
- Nurse, RN
- Social Worker

## 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 five (5) days before the moment – contains the hyperlink for the moment
  - Sent one (1) day 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 24 hours after the moment, if the moment has not been completed – does not contain hyperlink for the moment
  - Sent three (3) days 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 **five (5) days** 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 two 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 the first and second late notification emails that are sent to the participant. However, the participant's link to respond will not be included in the second and third late notification emails.

If the participant has deleted or lost his/her emails that contains the hyperlink to respond to the moment, please have the participant contact the PCG RMTS help desk at [cormts@pcgus.com](mailto:cormts@pcgus.com) or toll free at 1-866-766-9015.

### ***Participant Moment Access***

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

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

- First Notice - 5 days prior to actual moment
- Second Notice - 1 day 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:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

**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](tel:8667669015) **FREE**. Click 'Next' to continue.

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## Claiming System

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

### 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 Medicaid.

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.*

[Previous](#) [Next](#)

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## Claiming System

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

### What is Medicaid?

Medicaid is a federally funded health insurance program for lower income individuals as well as for individuals meeting certain other requirements.

Medicaid is also 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; OR

Writing the student's math resource service times for an IEP; OR

Having lunch; OR

Leading reading group with special education students; OR

Working with on a student on their math goals; OR

Writing service notes following evaluation for speech services; OR

Administering First Aid; OR

Writing the student's physical therapy goals for an IEP; OR

Checking work email

*Do not copy these examples into your sample moment.*

[Previous](#) [Next](#)

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## Claiming System

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

### What is Medicaid School Based Claiming (MSBC)?

MSBC is a joint state and federal program that offers LEA'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 Medicaid 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 three ways Medicaid pays for services provided in the schools:

1. Direct Services Claiming (DSC) Program
2. Targeted Case Management (TCM) Program
3. Medicaid Administrative Claiming (MAC) Program

[Previous](#) [Next](#)

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**Claiming System**

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

**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.

[Previous](#) [Next](#)

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**Claiming System**

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

**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.

[Previous](#) [Next](#)

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**Claiming System**

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

**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

[Previous](#) [Next](#)

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**Claiming System**

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

**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.*

[Previous](#) [Next](#)

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Claiming System

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

**Completing the Electronic RMTS Form (continued)**

Were you working with a student during this sampled moment?  
(select appropriate radio button when prompted)

Yes, I was working with a student who has an IEP or IFSP.  
Yes, I was working with a student without an IEP or IFSP.  
Yes, I was working with a student who is being assessed for an initial IEP or IFSP.  
No, but I was working on behalf of a student who has an IEP or IFSP.  
No, but I was working on behalf of a student without an IEP or IFSP. N/A

Was this service you performed listed on the child's IEP/IFSP?  
(select appropriate radio button when prompted)

Yes, the service I performed was listed on the child's IEP/IFSP.  
No, the service I performed was not listed on the child's IEP/IFSP.  
The child does not have an IEP/IFSP.  
N/A

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## Instructions and Tips for Completing Your Moment

Claiming System

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

**Instructions and Tips for Completing Your Moment**

1. Your selected time study moment is pre-determined. Do not answer the activity questions for any other time than your selected moment.
2. Answer the activity questions with as much detail as possible about your activity so in the event you are asked about your assigned moment during a possible audit or compliance review, you are able to easily recall the activity you were doing without revealing student information.
3. If you have questions about completing this process, please contact your district coordinator or email the PCG Help Desk as cormts@pcgus.com.
4. Keep in mind you are only describing what you were doing during that one-minute moment and not over a period of time.
5. To access your moment and the electronic form, select 'respond' next to the available moment.

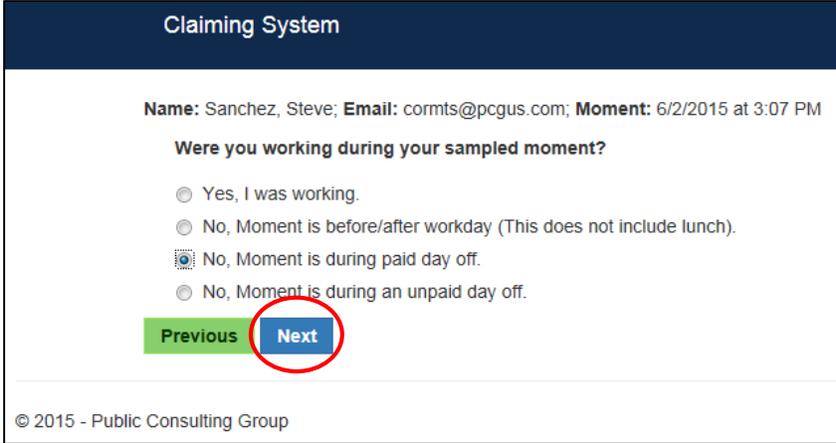
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After the participant has completed reading the training material and instructions, the participant will click 'Next' to access the RMTS form.

## 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.



**Claiming System**

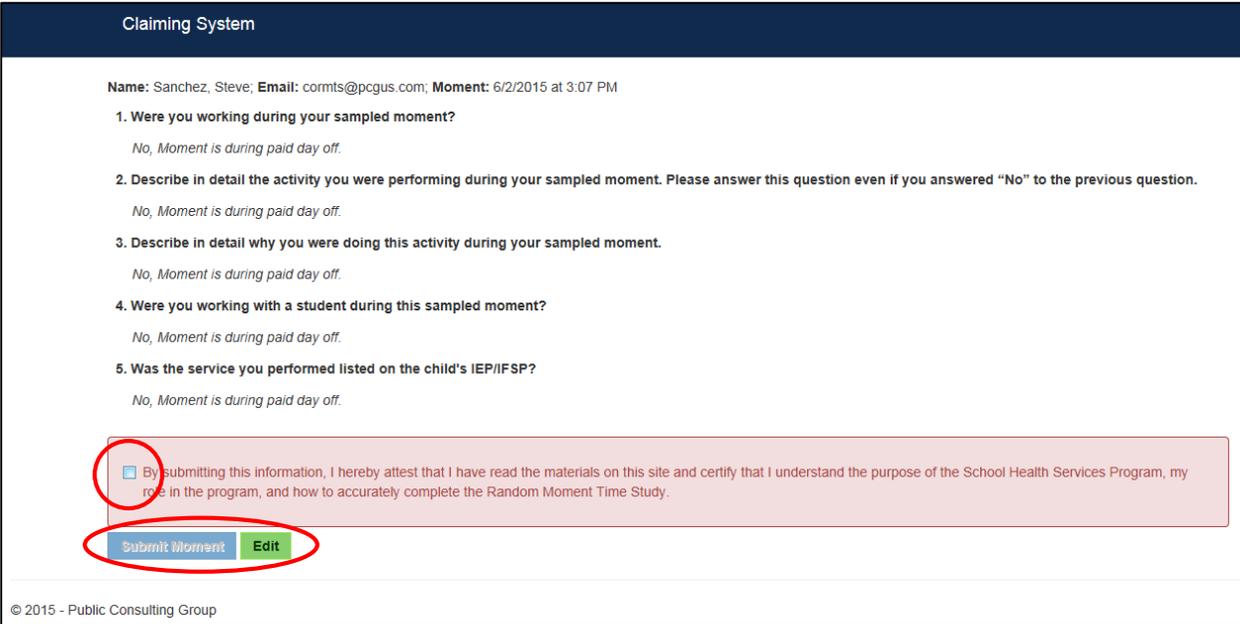
**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

**Were you working during your sampled moment?**

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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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.



**Claiming System**

**Name:** Sanchez, Steve; **Email:** cormts@pcgus.com; **Moment:** 6/2/2015 at 3:07 PM

1. **Were you working during your sampled moment?**  
*No, Moment is during paid day off.*

2. **Describe in detail the activity you were performing during your sampled moment. Please answer this question even if you answered "No" to the previous question.**  
*No, Moment is during paid day off.*

3. **Describe in detail why you were doing this activity during your sampled moment.**  
*No, Moment is during paid day off.*

4. **Were you working with a student during this sampled moment?**  
*No, Moment is during paid day off.*

5. **Was the service you performed listed on the child's IEP/IFSP?**  
*No, Moment is during paid day off.*

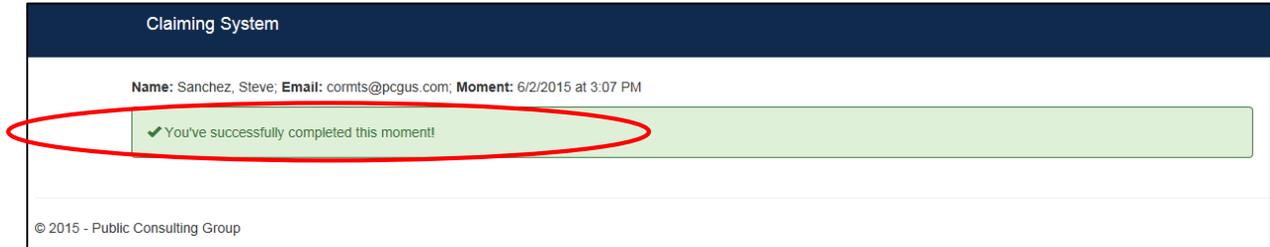
By submitting this information, I hereby attest that I have read the materials on this site and certify that I understand the purpose of the School Health Services Program, my role in the program, and how to accurately complete the Random Moment Time Study.

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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.

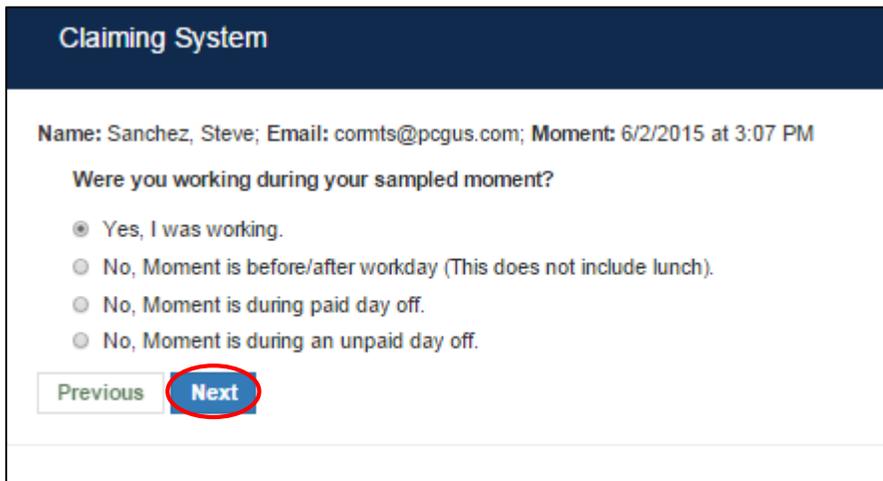
After the participant has clicked on the check box, the **Submit** button will appear. The participant can now click the button to submit the form for coding. The participant will receive confirmation that the form was submitted successfully.



The screenshot shows the 'Claiming System' interface. At the top, it displays the user's name and email: 'Name: Sanchez, Steve; Email: comrts@pcgus.com; Moment: 6/2/2015 at 3:07 PM'. Below this, a green message box with a checkmark icon states 'You've successfully completed this moment!'. This message box is circled in red. At the bottom left, there is a copyright notice: '© 2015 - Public Consulting Group'.

### *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 screenshot shows the 'Claiming System' interface with a question: 'Were you working during your sampled moment?'. Below the question are four radio button options: 'Yes, I was working.', 'No, Moment is before/after workday (This does not include lunch).', 'No, Moment is during paid day off.', and 'No, Moment is during an unpaid day off.'. At the bottom, there are two buttons: 'Previous' and 'Next'. The 'Next' button is circled in red.

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.

## Claiming System

Name: Sanchez, Steve; Email: comts@pcgus.com; Moment: 6/2/2015 at 3:07 PM

1. Were you working during your sampled moment?

- 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.

2. Describe in detail the activity you were performing during your sampled moment. Please answer this question even if you answered "No" to the previous question.

3. Describe in detail why you were doing this activity during your sampled moment.

4. Were you working with a student during this sampled moment?

*Example: Select answer below*

- Yes, I was working with a student who has an IEP or IFSP.
- Yes, I was working with a student without an IEP or IFSP.
- Yes, I was working with a student who is being assessed for an initial IEP or IFSP.
- No, but I was working on behalf of a student who has an IEP or IFSP.
- No, but I was working on behalf of a student without an IEP or IFSP.
- N/A

5. Was the service you performed listed on the child's IEP/IFSP?

*Example: Select answer below*

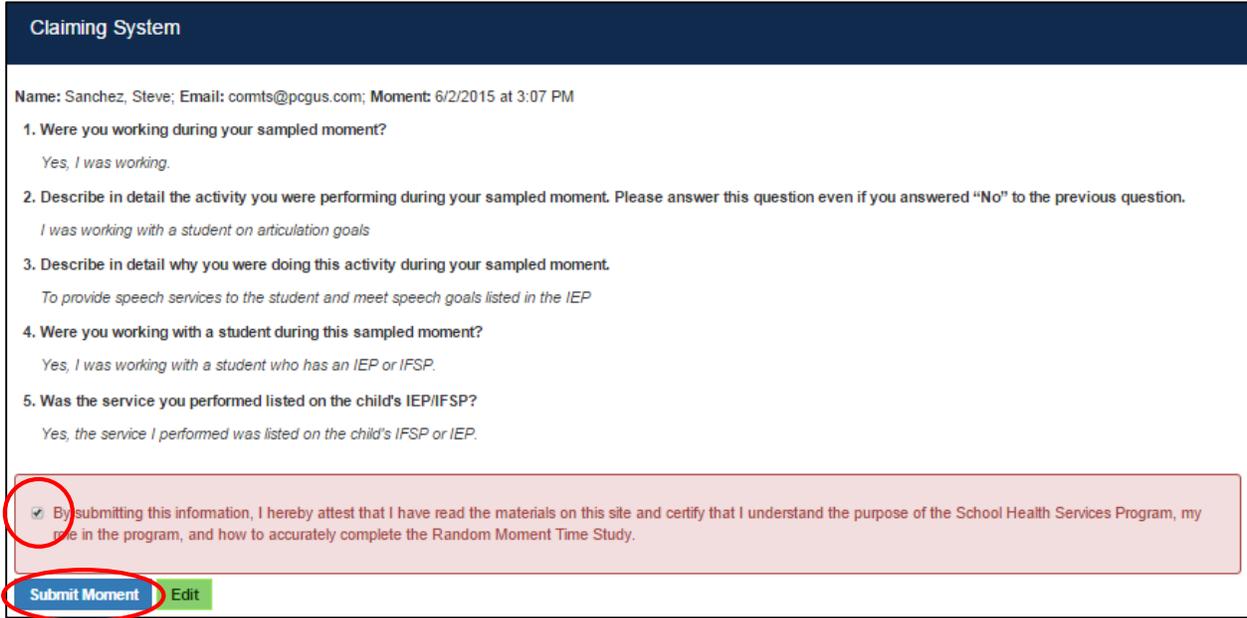
- No, the service I performed was not listed on the child's IEP/IFSP.
- Yes, the service I performed was listed on the child's IFSP or IEP.
- The child does not have an IEP/IFSP.
- N/A

Previous

Next

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.



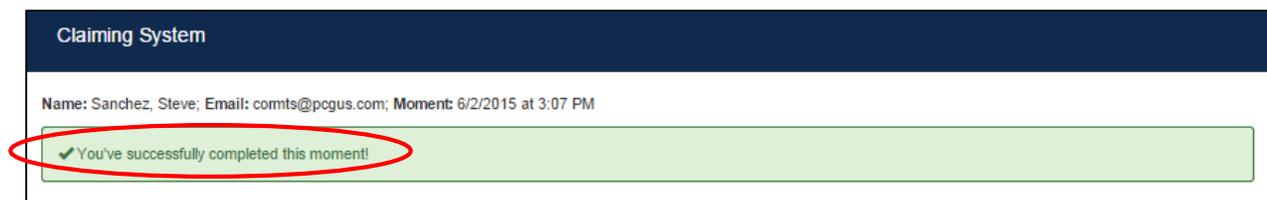
The screenshot shows the 'Claiming System' interface. At the top, it displays the user's name, email, and the time of the moment: 'Name: Sanchez, Steve; Email: comts@pcgus.com; Moment: 6/2/2015 at 3:07 PM'. Below this are five numbered questions with their respective answers:

1. Were you working during your sampled moment?  
*Yes, I was working.*
2. Describe in detail the activity you were performing during your sampled moment. Please answer this question even if you answered "No" to the previous question.  
*I was working with a student on articulation goals*
3. Describe in detail why you were doing this activity during your sampled moment.  
*To provide speech services to the student and meet speech goals listed in the IEP*
4. Were you working with a student during this sampled moment?  
*Yes, I was working with a student who has an IEP or IFSP.*
5. Was the service you performed listed on the child's IEP/IFSP?  
*Yes, the service I performed was listed on the child's IFSP or IEP.*

At the bottom of the form, there is a red-bordered box containing a checked checkbox and the text: 'By submitting this information, I hereby attest that I have read the materials on this site and certify that I understand the purpose of the School Health Services Program, my role in the program, and how to accurately complete the Random Moment Time Study.' Below this box are two buttons: 'Submit Moment' (highlighted with a red circle) and 'Edit'.

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.



The screenshot shows the 'Claiming System' interface after successful submission. It displays the same user information as the previous screenshot. Below the questions, there is a green-bordered box containing a checked checkbox and the text: 'You've successfully completed this moment!' (highlighted with a red circle).

*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](mailto: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](mailto: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 PCG RMTS help desk via email at [cormts@pcgus.com](mailto:cormts@pcgus.com) or toll free at 1-866-766-9015.

The link to access moments will not be provided to the district RMTS coordinator. The participant should complete the on-line RMTS form within five (5) days 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.

