Introduction to the CASPER Reporting and Payroll Based Journal (PBJ) systems

Training Outline:
Introductory Module
- Acronyms
- QTSO Website
- Minimum Hardware and Software Requirements
- Location of Detailed Technical Information
- PBJ Technical Training Opportunities
- QTSO Help Desk Information

Acronyms
- **PBJ** *(Payroll Based Journal)*
  - The PBJ system will collect Facility staffing data and census information
- **QIES** *(Quality Improvement and Evaluation System)*
  - This system collects and validates data from designated providers and produces quality measures and other provider reports.
- **CASPER** *(Certification and Survey Provider Enhanced Reporting)*
  - This is the application where users may obtain reports about the PBJ data submitted or manually entered into PBJ.
- **QTSO** *(QIES Technical Support Office)*
  - The entity that provides technical help desk support for the QIES User ID registration process and the CASPER Reporting and PBJ systems.

QTSO Website
- The QTSO website contains the PBJ technical user’s guides and other important technical information that you will use for the User ID Registration, CASPER Reports and PBJ systems.
- To access the QTSO website, enter https://www.qtso.com in your browser
- Bookmark this website for future use

Hardware and Software Requirements for PBJ
PBJ Technical Information
- On https://www.qtso.com/ Select the Vendors link in the left navigational bar.

PBJ Technical Information
- Select Payroll Based Journal (PBJ) at the top to find additional information for PBJ.
- Please check the “What’s New” section at the bottom of http://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInits/Staffing-Data-Submission-PBJ.html periodically for updates on the latest activities.

PBJ Training Opportunities
A description of the eleven WebEx training modules will now be presented. Please follow along in your training slides as the modules are described.
- **Introduction** - Introduction to the CASPER Reporting and PBJ systems.
- **Module 1** - Obtaining a CMSNet User ID: How to obtain a CMSNet User ID.
- **Module 2** - Installing Juniper Software to access the QIES system: How to install the Juniper software required to access the QIES system.
- **Module 3** - Obtaining a QIES User ID: How to obtain a QIES User ID to access the CASPER Reporting and PBJ systems.
- **Module 4** - PBJ XML Submission: How to submit PBJ records to the PBJ system.
- **Module 5** - PBJ Login and Initial Facility Setup: How to start the process of manual PBJ data entry.
- **Module 6** - PBJ Employee Information: How to add, edit and delete employees manually in the PBJ system.
- **Module 7** - PBJ Staffing Information: How to add, edit and delete staffing information manually in the PBJ system.
- **Module 8** - PBJ Census Information: How to add, edit and delete census information manually in the PBJ system.
- **Module 9** - Retrieving the PBJ Final File Validation Report: How to locate the Final Validation Report in the CASPER system. This report contains information about each of the PBJ records submitted via XML submission to the PBJ system.
- **Module 10** - Interpreting the Final Validation Report: Provides information about reviewing and interpreting the Final Validation Report and gives you guidance about addressing errors that may return on the report.
- **Module 11** - CASPER Reports for PBJ Providers: How to request other PBJ reports available to you in the CASPER Reporting system.
QIES Technical
Help Desk Support

If at any point in the process you need technical assistance, you may contact the QIES Technical Support Office help desk at

(1) 800-339-9313 or by email at help@qtso.com.

For PBJ policy questions you may email nhstaffing@cms.hhs.gov.

(Please print this page and post by the PC used for PBJ)
CMSNet User ID Registration Process

Training Outline: Module 1
- CMSNet User ID Registration Tips
- CMSNet User ID
- QTSO Website
- CMSNet Information Page on QTSO Web Site
- CMSNet Remote Access Request Portal Home Page
- CMSNet Help Desk Information

CMSNet User ID Registration Tips
Ensure that you have available your provider’s CCN (CMS Certification Number), state and ZIP Code prior to registering for the CMSNet User ID

CMSNet User ID
CMSNet User ID allows you access into CMS’ private network where the CASPER Reporting and PBJ systems reside

First of two required User IDs necessary to access the CASPER Reporting and PBJ systems

Each provider is allowed two CMSNet User IDs

User IDs and passwords may not be shared

Online, self-registration process

CMSNet Online Registration link is posted on the CMSNet Information page on the QTSO website.

Print the PBJ CMSNet Online Registration Instructions.

CMSNet Remote Access Tips
Once the CCN, State and ZIP Code information validation passes, complete the remainder of the fields on the Access Request Form tab

Additional fields to be completed include:

Type of Request

Type Provider (select MDS for PBJ access)

Personal information
NOTE: Required fields are marked with an asterisk (*).

After completing the required information, select the Submit button and a "Request Successfully Submitted" page displays. Page includes the following information:

Allow two full business days to receive your login information

Login information will be sent from mdcn.mco@palmettobga.com

If you do not receive your login information, check your spam folder before calling the CMSNet Help Desk for assistance.

Two emails will be sent from mdcn.mco@palmettobga.com:

Email #1 – contains your CMSNet user ID

Email #2 – contains the password associated to the user ID, links to access the Juniper software installation document, Frequently Asked Questions (FAQ’s) and contact information

Help Desk Support
If you have questions while registering for the CMSNet User ID, contact the CMSNet Help Desk by:

Phone at (888) 238-2122

E-mail at mdcn.mco@palmettobga.com
Installing the Juniper Software to Access CMSNet

Training Outline:
Module 2
- QTSO Website
- Installation Guide for CMSNet Remote Users
- Next Steps After Juniper Software Is Installed
- Important Tips
- CMSNet Help Desk Contact Information

QTSO Website
- The QTSO website contains the Installation Guide for CMSNet Remote Users
- A link to access the installation guides is also available in the second email you received when you registered for your CMSNet user ID referenced in module 1

Important Tips
- You must have administrative privileges to install the Juniper software on your PC
- Contact your IT support personnel for their assistance with this step if you do not have administrative privileges
- The administrative privileges are only necessary for the set up and first successful log in to the Juniper client
- Refer to the Installation Guide for CMSNet Remote Users for additional information regarding administrative privileges
- Once you are logged into the CMS Network, you will not be allowed to access the Internet, network printers, or email until you log out of the network

CMSNet Help Desk Support
- Contact the CMSNet Help Desk if:
  - You require assistance with any of the functions outlined in the Installation Guide for CMSNet Remote Users
  - You have difficulty connecting to the CMS Network after you have completed the software installation
- Contact number is (888) 238-2122
QIES User ID Registration Process

Training Outline:
Module 3
- QIES User ID Activation Tips
- QIES Systems for Providers Website
- QIES User ID Registration
- Activating Your QIES User ID
- QTSO Help Desk Information

QIES User ID Registration Tips
- The QIES user ID allows you to access the CASPER Reporting and PBJ systems
- Only persons responsible for submitting PBJ records or reviewing PBJ reports should register for this ID.
- The QIES User ID is the second of two separate required user IDs. Each provider will be allowed to register for two QIES (PBJ) User IDs.

QIES User ID Registration Tips
- The Provider User Registration system allows you to self-register for your QIES user ID.
- Two-step registration process
- Complete the online registration form
- Activate your new QIES user ID

QIES Systems Website
- The CMS QIES Systems for Providers website contains the PBJ technical user’s guides and other important technical information that you will use for the QIES User ID Registration and PBJ record submission process.
- To access the QTSO website, enter https://mds.qiesnet.org/mds_home.html in your browser.
- Bookmark this website for future use.

QIES User ID Registration Tips
- Remember the answers to your security questions.
- The answers to the security questions will be used if you need to reset your password.
- A Confirmation of PBJ User ID Registration page will display following a successful registration.
- Print this page for your records.
QIES User ID Registration Tips

- Confirmation of PBJ User ID Registration page contains the following information:
  - Your new PBJ user ID – you will need this for activation of your new QIES user ID
  - Some personal information entered in the online registration form
  - The Facility ID (FAC_ID) for your provider. The Facility ID must be entered into the software used to create the PBJ records
  - Additional helpful information is available in the Notes section of the confirmation message

User ID Activation Tips

- An e-mail will be sent to the e-mail address you used for the registration process. This e-mail contains the necessary information required to activate your new QIES user ID.
- You may need to log out of the Provider User Registration system to log into your e-mail and access the activation e-mail.
- The Activation e-mail contains the following information:
  - Link to the Activation web page
  - Activation Key
  - Activation Complete Date – you must activate your user ID no later than the Activation Complete date identified in the e-mail
  - If you do not activate the new user ID prior to the Activation Complete date, you will be required to repeat the registration process.

Security Reminder

- Remember: It is a violation of CMS security policy to share your individual user IDs and passwords.

QTSO Help Desk Support

- If you have questions or encounter issues during the QIES User ID registration process, contact the QTSO Help Desk by:
  - Phone at (877) 201-4721
  - E-mail at help@qtso.com
PBJ XML Submission Process

Training Outline: Module 4

- CMS Website
- QTSO Website
- Important Reminders
- Merge/Replace
- CMS QIES Systems for Providers Welcome Page
- XML Submission Process
- QTSO Help Desk Support

CMS Website

The CMS website contains the PBJ technical data specifications required for PBJ XML submissions.

To access the CMS website, enter http://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInitis/Staffing-Data-Submission-PBJ.html in your browser.

Bookmark this website for future use.

QTSO Website

The QTSO website contains technical user guides and other important technical information that you will use for the CMSNet and QIES User ID Registration.

To access the QTSO website, enter https://www.qtso.com in your browser.

Bookmark this website for future use.

Important Reminders

The PBJ XML submission process should not be attempted if any of the steps below are not complete.

Ensure that you have a CMSNet User ID and password and the Juniper software is correctly installed on your PC.

Register and activate your PBJ QIES User ID. This gives you access to the CASPER Reporting and PBJ systems.

To obtain instructions about registering for a CMSNet User ID, QIES User ID or installing your communications software, please refer to recorded training Module 1 – CMSNet User ID Registration, Module 2 – Installing Juniper Software and Module 3 – QIES User ID Registration at https://www.qtso.com/webex/qiesclasses.php.
Each XML file must be created in accordance with CMS’s PBJ Data Specifications.

The PBJ system only processes zipped files with a "zip" extension. Files with extensions other than .zip will not be accepted into the PBJ system.

The PBJ system will only accept files that are 5 MB or less in size.

Also important to note is that two employee records cannot have the same employee ID in the employee section of the XML file. This will result in a rejected file. Therefore, if you need to make one or more updates to an employee’s information, you will need to do this in separate zip files.

The two examples below are not allowed in one zip file for the same employee. You will need to submit the second change (b.) in a subsequent zip file.

1. Pay-Type Code change example
   a. Change pay type code from exempt to non-exempt
   b. Change pay type code back to exempt

2. Hire or Term Date change example
   a. Update the term date
   b. Add a new hire date

**Merge/Replace**

The process type functionality has two options and is as follows:

The "process type" within the <staffing hours> and <census> tags are used to control how the data within these sections will be processed. There are two possible values for “process type”: “merge” and “replace”.

**Replace**

If "process type" is set to the value "replace", then all the data for that specific section (census or staffing) for the specified quarter will be removed from the active database and then replaced with the data submitted in the file.

**Merge**

If “process type” is set to the value “merge”, then the data within that section will be processed as follows:

- Staffing Hours data will be matched on the employee ID, job title and date. If data exists for a specific day/employee ID/job title combination, it will be overwritten; otherwise the data for that day is simply added.
Census data will be matched on the month end date. If data exists for a specific month end date, it will be overwritten; otherwise the data for that day is simply added.

**Merge/Replace - Scenarios**

Scenario #1: A facility submits hours for week 1 for all their employees. Then they submit hours for week 2 with process type="merge". Week 1 hours are left intact and week 2 hours are added on.

Scenario #2: A facility submits hours for week 1 for all their employees. Then they submit hours for week 2 with process type="replace". Week 1 hours are removed and week 2 hours are added. Only week 2 hours will remain in the database.

Scenario #3: A facility submits hours for week 1 for all their employees. They realize they made a mistake for a single employee on a single day. For EMP1234 they had 4 hours on Job Title 1 and 5 hours on Job Title 2 on 4/28/2015. They submit a file with process type="merge" that only contains 3 hours on Job Title 3 and 4 hours on Job Title 4 on 4/28/2015. The original hours on Job Title 1 and Job Title 2 are removed, and the hours for Job Title 3 and Job Title 4 are added. No other data was affected by the merge.

Scenario #4: If staffing data is submitted in the same XML for the same employee id, job title and date, the staffing hours will be added together.

Scenario #5: If census data is submitted for the same month end date multiple times in the same XML, the census count will be added together.

Please Note: The PBJ manual data entry system will automatically perform the merge/replace functions, this feature is only important for XML submissions into the PBJ system.

**CMS QIES Systems for Providers Welcome Page**

The PBJ XML submission process begins at the point of establishing the connection to the CMS private network as outlined in the Installation Guide for CMSNet Remote Users referenced in Module 2; however, for demonstration purposes, this module will begin at the CMS QIES Systems for Providers Welcome Page.

**XML Submission Process**

The confirmation message only confirms successful receipt of the file by the CASPER Reporting and PBJ systems. It does NOT confirm the file has processed or the records have been accepted by the CASPER Reporting and PBJ systems.

It is highly recommended that you print this message or otherwise note the submission ID and date information. You will need this information to identify the corresponding system-generated Final Validation Report in the CASPER Reporting system. The confirmation message is cleared once you perform another PBJ File Submission function.
NOTE: After your submitted PBJ data file is successfully received by the CASPER Reporting and PBJ systems, the PBJ system validates the file structure and data content. Within 24 hours of a successful submission, a system-generated Final Validation Report is created in the CASPER Reporting system.

This report provides a detailed account of any errors found during the validation of the records in the PBJ submission file. This report is generally created within minutes of the submission, but the time does vary depending on the size of your file and concurrent system activity.

**Training Progression**

Please proceed to Module 5 “PBJ Login and Facility Information Verification” if you plan to submit data manually or go to Module 9 “Retrieving the PBJ Final Validation Report” for more information on the report that is generated once the file is processed.

Please note: You can perform a combination of manual data entry and XML submissions.

**QTSO Help Desk Support**

If you require assistance with the PBJ system, contact the QTSO Help Desk by:

Phone at (800) 339-9313

E-mail at help@qts.com
PBJ Login and Facility Information Verification

Training Outline: Module 5

- CMS Website
- QTSO Website
- Important Tips
- PBJ Login
- Facility Information Verification
- QTSO Help Desk Support

CMS Website
The CMS website contains the PBJ technical data specifications required for PBJ XML submissions.

To access the CMS website, enter http://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInitiatives/Staffing-Data-Submission-PBJ.html in your browser.

Bookmark this website for future use.

QTSO Website
The QTSO website contains the technical user guides and other important technical information that you will use for the CMSNet and QIES User ID Registration.

To access the QTSO website, enter https://www.qtso.com in your browser.

Bookmark this website for future use.

Important Tips
The PBJ submission process should not be attempted if any of the steps below are not complete.

To connect to the CMS Network and access the CASPER Reporting and PBJ systems, ensure that you have a CMSNet User ID and password and the Juniper software is correctly installed on your PC.

To successfully login to the CASPER Reporting and PBJ systems you must have registered for and activated your QIES User ID.

PBJ Login
To log into the PBJ system, select the PBJ Submissions link. The QIES National System Login page now displays.
Enter your QIES User ID in the User ID field.

Enter the password for your QIES User ID.

Select the Login button and the U.S. Government-Authorized Use Only pop-up window is presented. Review the contents of the window.

Select the OK button. The PBJ Home page is presented.

**Facility Information Verification**
Under the Updates and Alerts section you will see the Facility State, Facility ID and Facility Name that your QIES User ID is associated with.

If you are a PBJ Corporate or Third Party Service Bureau and your User ID is associated to multiple Facilities, select the drop down list to view all Facilities.

If you see an issue with your Facility information you will need to contact your state MDS/ASPEN Coordinator for any necessary updates.

**QTSO Help Desk Support**
If you require assistance with the PBJ submission system, contact the QTSO Help Desk by:

Phone at (800) 339-9313

E-mail at help@qtsoro.com
PBJ Employee Data

Training Outline: Module 6
PBJ Login

Add Employee Data

Edit Employee Data

Delete Employee Data

QTSO Help Desk Support

PBJ Login
To log into the PBJ system, select the PBJ Submissions link and the QIES National System Login page displays.

If you are unable to login you can go to the QIES User Maintenance application to reset your User ID/Password.

Enter your QIES User ID in the User ID field.

Enter the password for your QIES User ID.

Select the Login button and the U.S. Government- Authorized Use Only pop-up window is presented. Review the contents of the window.

Select the OK button and the PBJ Home page is presented.

Add Employee Data
Under the Data Entry section select the Employee Data option.

The Manual Employee Data Entry screen will be displayed.

You can choose to see Terminated Employees in the employee list by selecting the Include Terminated Employees checkbox.

Select the Facility from the dropdown to view the corresponding Employee List.

The Employee List page will be displayed.

To add a new employee, select the Add New Employee option.

The Add New Employee page will display.

All fields marked with an asterisk will be required.

After all required fields are filled out select the Save New Employee button.

A confirmation message will be displayed confirming the employee record has been saved.
Edit Employee Data
If you need to edit existing employee information, go to the Employee List and select Edit.

After you have made the correction select the Save Changes button.

Delete Employee Data
If you need to delete an existing employee you can go to the Employee List and select Delete. Only employees without staffing hours saved can be deleted.

Training Progression
Following completion of this recorded training module, please view Module 7 “Staffing Data”. Please note: You can perform a combination of manual data entry and XML submissions.

QTSO Help Desk Support
If you require assistance with the PBJ submission system, contact the QTSO Help Desk by:

Phone at (800) 339-9313
E-mail at help@qtsq.com
PBJ Staffing Data

Training Outline: Module 7
- PBJ Login
- Add Staffing Data
- Edit Staffing Data
- Delete Staffing Data
- Training Progression
- QTSO Help Desk Support

PBJ Login
To log into the PBJ system, select the PBJ Submissions link and the QIES National System Login page displays.

If you are unable to login you can go to the QIES User Maintenance application to reset your User ID/Password.

Enter your QIES User ID in the User ID field.

Enter the password for your QIES User ID.

Select the Login button and the U.S. Government-Authorized Use Only pop-up window is presented. Review the contents of the window.

Select the OK button and the PBJ Home page is presented.

Add Staffing Data
Under the Data Entry section Select the Staffing Hours Data option.

The Manual Staffing Hours Data Entry screen will be displayed.

Select the Facility that corresponds to the Staffing Data.

Select the Federal Fiscal Quarter that corresponds to the Staffing Data.

Select the Calendar Date that corresponds to the Staffing Data.

Search for the Employee ID that needs staffing hours added. The search function is a 'smart search' which means you could enter in the entire employee id or just a partial search. For example you could search for all employee id's that have the number 1 in them.
The default number of employees displayed is 10. You can change the amount of employees you view at a time by selecting the View option and changing the value. You may also use the page functionality to navigate your employee list.

Select the Employee ID in the Staffing Details section.

Select the Labor Category/Job Title code from the dropdown list.

Enter the staffing hours for the employee.

If the employee has multiple job titles you can add additional job titles by selecting the plus sign next to the Add New Work Entry button. Providers do not need to split time of employees who may perform multiple duties throughout the day. Rather, providers are to report an employee’s primary role each day. Providers may report multiple job titles for employees on separate days.

You will then select the Labor Category/Job Title code from the dropdown list and enter the staffing hours for the employee for their second job title.

**Edit Staffing Data**

To update hours that have been entered you can highlight the existing hours and enter the correct hours. If you need to delete hours then you can highlight the existing hours and delete them out. This will update the hours for that day/job code to zero.

After you have entered staffing hours you will select the Save Changes button on the bottom of the staffing hours screen.

**Delete Staffing Data**

If you need to delete additional job titles you can select the red X if the changes haven’t been saved. If the changes have been saved the red x is no longer available. If you need the job title removed you can leave it blank and it will automatically drop off after one week if no hours have been saved to that specific job title.

**Training Progression**

Following completion of this recorded training module, please view Module 8 “Census Data”. Please note: You can perform a combination of manual data entry and XML submissions.

**QTSO Help Desk Support**

If you require assistance with the PBJ system, contact the QTSO Help Desk by:

Phone at (800) 339-9313

E-mail at help@qtso.com
PBJ Census Data

Training Outline: Module 8
- PBJ Login
- Add Census Data
- Edit Census Data
- Delete Census Data
- QTSO Help Desk Support

PBJ Login
To log into the PBJ system, select the PBJ Submissions link and the QIES National System Login page displays.

If you are unable to login you can go to the QIES User Maintenance application to reset your User ID/Password.

Enter your QIES User ID in the User ID field.

Enter the password for your QIES User ID.

Select the Login button and the U.S. Government- Authorized Use Only pop-up window is presented. Review the contents of the window.

Select the OK button and the PBJ Home page is presented.

Add Census Data
Under the Data Entry section, select the Census Data option.

The Manual Census Data Entry screen will be displayed.

Select the Facility that corresponds to the Census Data.

Select the Federal Fiscal Quarter that corresponds to the Census Data.

Census data needs to be submitted on the last day of the month for a total of three submissions per quarter.

The three types of Census data required are as follows:

Medicare Census
Medicaid Census
Other Census
Select the appropriate box that corresponds to the correct month end date and enter your census information.

The Total Census count will be displayed on the right hand side.

Select the Save Changes button to save your Census Data.

**Edit and Delete Census Data**

To make a change to saved census data you can highlight the field that needs updated and enter the correct number or enter zero if you entered the information in the wrong field.

Save any updates by selecting the Save Changes button.

**QTSO Help Desk Support**

If you require assistance with the PBJ submission system, contact the QTSO Help Desk by:

Phone at (800) 339-9313

E-mail at help@qtso.com
Retrieving the PBJ Final File Validation Report in CASPER

Training Outline: Module 9
- CMS Website
- QTSO Website
- Accessing the Validation Report (VR) Folder
- Accessing the Final File Validation Reports (VR)
- VR Tips
- CASPER Reporting User’s Manual
- Training Progression
- QTSO Help Desk Information

CMS Website
The CMS website contains the PBJ technical data specifications required for PBJ XML submissions.

To access the CMS website, enter http://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInitis/Staffing-Data-Submission-PBJ.html in your browser.

Bookmark this website for future use.

QTSO Website
The QTSO website contains the technical user guides and other important technical information that you will use for the CMSNet and QIES User ID Registration.

To access the QTSO website, enter https://www.qtso.com in your browser.

Bookmark this website for future use.

Accessing the Validation Report (VR) Folder
You must be connected via CMSNet before you can access the Providers Welcome Page or CASPER Reports.

To log into the CASPER Reporting system, select the CASPER Reporting link. The QIES National System Login page displays.
- Enter your QIES User ID in the User ID field
- Enter the password for your QIES User ID
- Select the Login button
- The U.S. Government-Authorized Use Only pop-up window is presented. Review the contents of the window.
- Select the OK button and the CASPER Home page is presented.

Once logged into the CASPER Reporting system, select the Folders button to access your provider’s Validation Report (VR) folder.

The VR folder name is configured as follows:

State Code is the two-character state abbreviation for your provider.

PBJ is the provider type.

Facility ID is the CMS-assigned ID used to associate the submitted PBJ records to your provider.

VR is the abbreviation for Validation Report.

The VR folder is only accessible to users associated with your provider.

Other users not associated to your provider cannot see your provider’s VR folder.

**Accessing the Final File Validation Reports (VR)**

To view the PBJ Final File Validation Reports for your provider, select the VR folder link.

A list of links for the system-generated PBJ Final File Validation Reports is displayed.

The links for the system-generated Final File Validation Report (VR) are sorted in ascending order by submission Date & Time. Submission Date and Time is the date and time the PBJ file was accepted into the CASPER Reporting and PBJ systems.

To view the Submission ID of the VR you can hover over the PDF symbol under the Info column. The Submission ID is the unique numeric identifier assigned to the PBJ file at the time of submission.

You can also select the PDF icon to see additional document information.

To locate the VR you wish to view, select the link containing the submission ID that matches the submission ID in the Initial Confirmation message that you printed earlier. The system-generated VR will display.

**PBJ Final File Validation Report Tips**
- Automatically generated by the CASPER Reporting and PBJ systems.
- Provides detailed information about each record contained in the submission file. Please note that only records where the Facility ID could be verified by the CASPER Reporting and PBJ systems display.
- Includes the following for each record that was successfully processed:
  - The status of record processing - Accepted or Rejected
  - Identification items to identify the record
  - Error messages associated to the record, if applicable
- Review carefully to determine the processing status of each record included in the submission file. Records with fatal errors and a status of Rejected are not saved into the CASPER Reporting and PBJ systems.
- If fatal errors are returned on the Validation Report, corrections should be made to the record and the record should be resubmitted to the CASPER Reporting and PBJ systems.
- The report is automatically deleted from the VR folder after 60 days.
- CMS highly recommends that you print or save a copy of the report prior to the system deletion.

**PBJ User’s Guide**
The PBJ User’s Guide is available in the PBJ application and the CMS QIES Systems for Providers Welcome page. The PBJ User’s Guide provides a detailed explanation of the PBJ Final File VR.

**Training Progression**
Following completion of this recorded training module, please view Module 10 “Interpreting the PBJ Final File VR”.

**QTSO Help Desk Support**
If you require assistance with the CASPER Reporting and PBJ systems, contact the QTSO Help Desk by:

Phone at (800) 339-9313

E-mail at help@qtso.com
Interpreting the PBJ Final File Validation Report

Training Outline: Module 10
- Tips about the VR
- Types of Error Messages
- User Guide References
- Training Progression
- QTSO Help Desk Information

Tips about the VR
To view the PBJ Final File Validation Report you must be logged into CMSNet.

The PBJ Final File Validation Report provides feedback about the processing status of each record included in the submission file.

It is vitally important that you print and carefully review each PBJ Final File Validation Report.

Types of Error Messages (Fatal & Warning)
The two types of errors that could display on the VR are fatal errors and warning messages.

Fatal - If the record contains one or more fatal errors, it is rejected and NOT accepted by the PBJ system.

The fatal error(s) must be corrected and the record must be resubmitted to the PBJ system.

If a record contains both Fatal and Warning errors, fatal errors take precedence; the record is rejected.

Depending on the fatal error received it’s possible a VR will not be generated for the Facility. If this is the case you will need to run the PBJ Submitter Report to determine why the VR was not generated. Instructions for the PBJ Submitter Report will be outlined in Module 11 – Other Casper Reports for PBJ.

Warning - If the record contains only warning messages, the record is accepted by the PBJ system.

Evaluate the message to determine if the error must be addressed.
User Guide References
Refer to the PBJ User’s Guide for additional information about the potential error messages that may appear on the PBJ Final File Validation Report.

The above guide is available in the PBJ application and on the CMS QIES Welcome page.

Training Progression
Following completion of this recorded training module, please view Module 11 “Other CASPER Reports for PBJ”.

QTSO Help Desk Support
If you have questions about interpreting the PBJ Final File Validation Report (VR) in the CASPER Reporting system, contact the QTSO Help Desk by:

Phone at (800) 339-9313

E-mail at help@qtso.com
Other CASPER Reports for PBJ

Training Outline: Module 11
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CMS Website
The CMS website contains the PBJ technical data specifications required for PBJ XML submissions.

To access the CMS website, enter http://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInitiatives/Staffing-Data-Submission-PBJ.html in your browser.

Bookmark this website for future use.

QTSO Website
The QTSO website contains the technical user guides and other important technical information that you will use for the CMSNet and QIES User ID Registration.

To access the QTSO website, enter https://www.qtso.com in your browser.

Bookmark this website for future use.

General Report Information
Select the desired underlined report name link from the right-hand frame.

One or more CASPER Reports Submit pages are presented providing criteria options with which you specify the information to include in your report. These options may differ for each report. Specific report criteria details are outlined later on in this training module.
Choose the desired criteria and select the Submit or Next button.

NOTE: PBJ reports access detailed information and may require a significant amount of time to process. Once you submit your report request(s), you may consider exiting the CASPER Reporting application and viewing the completed report(s) at a later time.

1700D Employee Report
The Employee Report lists the active and/or terminated employees associated with a facility during a specified period.

The report is available in PDF or CSV format.

1701D Census Report
The Census Report details facility census information for a specified period.

The report is available in PDF or CSV format.

1702S Staffing Summary Report
The Staffing Summary Report summarizes staffing information by Job Title for a facility during a specified period.

The report is available in PDF or CSV format.

PBJ Submitter Final File Validation Report
The PBJ Submitter Final File Validation Report provides detailed information about the status of a select submission file.

The report indicates whether the submitted file was accepted or rejected and details the warning and fatal errors encountered.

The report is sorted by State Code and Facility ID.

User’s Guide Reference
Refer to Section 2, Functionality, of the CASPER Reporting User’s Guide for assistance in viewing, printing, saving and exporting the reports you request. The CASPER Reporting User’s Guide is located on the QIES Systems for Providers Welcome page.

NOTE: PBJ reports are automatically removed after 60 days.
Training Progression
Module 11 is the final PBJ training module. Please review prior modules as needed.

QTSO Help Desk Support
If you require assistance with the CASPER Reporting and PBJ systems, contact the QTSO Help Desk by:

Phone at (800) 339-9313

E-mail at help@qtso.com