California Local Education Agency School-Based Medi-Cal Administrative Activities Coordinator PCG Claiming System User Guide

2018

Table of Contents

The California Local Education Agency (LEA) School-Based Medi-Cal Administrative Activities (SMAA) coordinator's guide was developed to assist the LEA SMAA coordinator with navigating through the on-line PCG Claiming System. The guide provides the LEA SMAA coordinator with a walk-through of the screens that are available for managing the program and moment notifications at the LEA level. This guide also provides detail around the on-line Random Moment Time Survey (RMTS) form that will be completed by the sampled participants.

The LEA SMAA is responsible for routinely accessing the PCG Claiming System website. The PCG 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 LEA SMAA coordinator to edit and monitor their Time Study Participant (TSP) list and manage shifts and calendar(s).

The TSPs will receive a hyperlink via email in order to access their moment. The TSP must contact their LEA SMAA coordinator in case of deletion or non-receipt of the email to respond to assigned moments. With this responsibility, it is essential that the TSP understand how to obtain his/her email, and how to access and accurately complete the on-line RMTS form.

This User Guide will provide the following details related to LEA SMAA 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 TSP
- How to access hard copy moments (when applicable)
- How to access reports used to help manage program compliance

Introduction to the RMTS

What is RMTS?

To participate in the SMAA program, LEAs must participate in the RMTS, or a time survey methodology for accurately assessing the time spent on administrative activities. The RMTS method polls each TSP on an individual basis at random time intervals over a given time period and totals the results to determine the work effort for the entire population of TSPs over that same time period. The RMTS method provides a statistically valid means of determining what portion of the selected group of a TSP workday is spent performing activities that are reimbursable by Medi-Cal.

Who participates in the RMTS?

All staff that perform allowable Medi-Cal direct service and administrative activities participate in a quarterly time survey, that are not 100% federally funded. As a part of their regular job functions TSPs are either 1) eligible to provide Direct School-Based Services, perform activities reimbursable under the SMAA program, and meet the provider credential and license requirements necessary to provide direct School-Based services; or 2) on a regular basis provide administrative activities only that are considered reimbursable under the SMAA program.

In order to ensure success with the RMTS, the following is a list of requirements for participation:

- Coordinators must complete an annual training
- If selected, TSP must complete the training prior to completing the RMTS form
- TSPs must complete the RMTS form answering all of the questions within 5 student attendance days (electronically) or 3 student attendance days when using the hard copy option
- Coordinators must monitor TSP participation ensuring that all forms are completed and returned timely

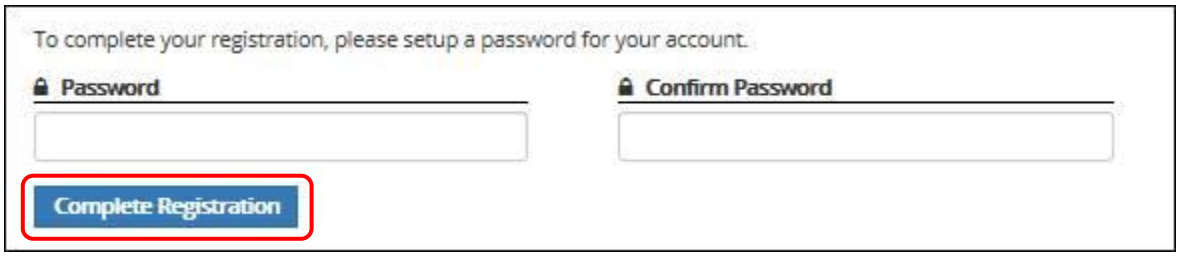
Accessing the PCG Claiming System

First Time Registration for System Users

Once system users are added to the PCG Claiming System they will receive an email with the subject 'New Account Registration' from calec@pcgus.com, a 'do not reply' email address.

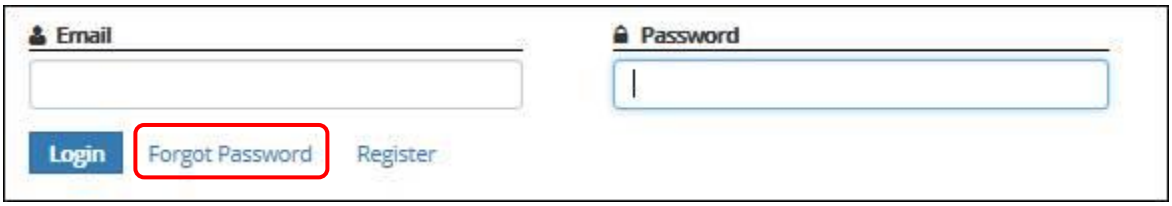
First time users need to click the web link in the email and will then be brought to the page below to enter their password in the 'Password' and 'Confirm Password' fields.

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.

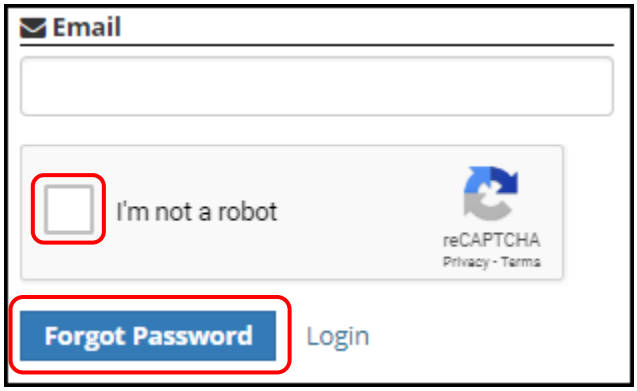


Resetting Passwords

User passwords will never expire but they can be reset as needed. If a user needs a new password, or has forgotten their login information, simply click on the 'Forgot Password' link located next to 'Log in'.



Next, select the box next to 'I'm not a robot' and select 'Forgot Password' button.



The user will then be sent an email with the subject 'Reset Password Request' from calec@pcgus.com 'do not reply' email address. The email will contain a link to the page below for users to reset their password. Enter the new password in the 'Password' and 'Confirm Password' fields and click the 'Reset Password' button.

User will then be brought back to the main page to enter the email and new password to log into the site.

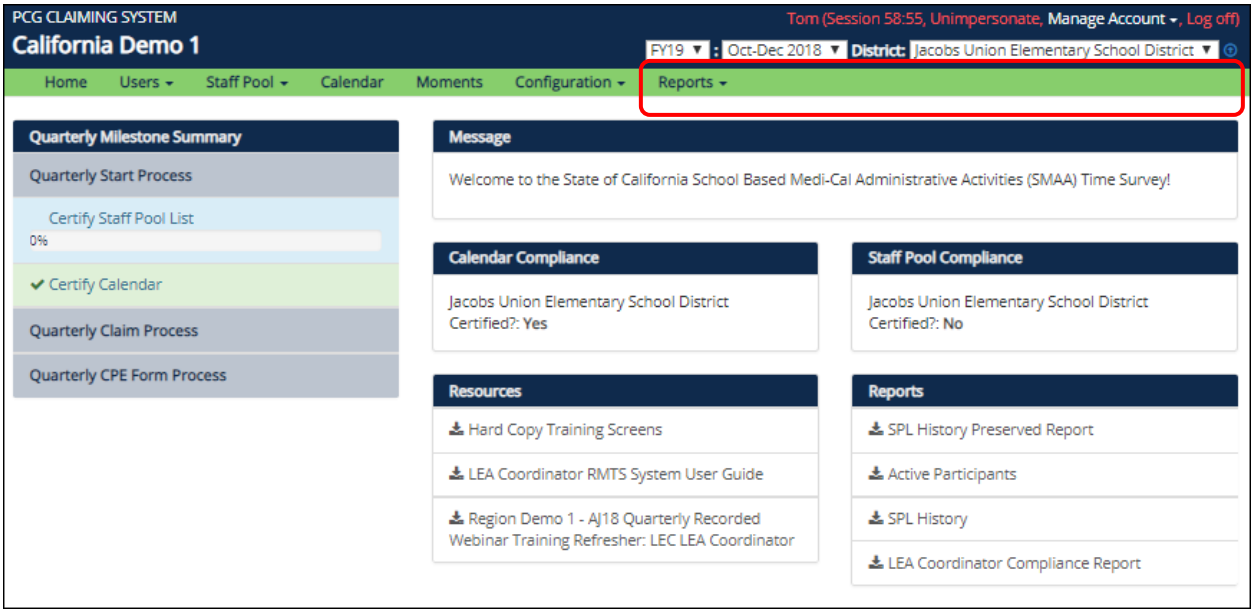
Registered User Login

1. To enter the PCG Claiming System website after registering, a coordinator will open an Internet browser and enter the appropriate claiming website address.

2. Enter email and password. Password must be entered exactly as created, using appropriate letter cases and symbols.

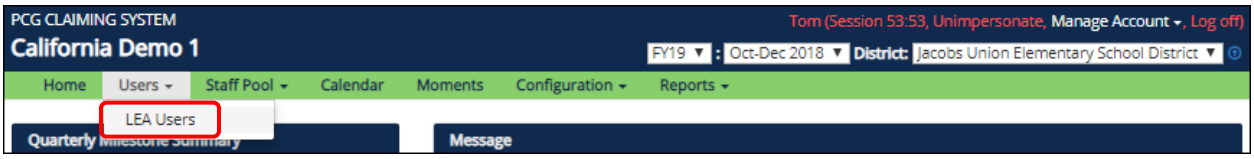
Navigating the Home Screen

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 links to 'Staff Pool', 'Calendar', and 'Configuration'. 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 fields known as widgets that will display information regarding quarterly milestone summaries, moment status, and resources uploaded by PCG. Click on the 'Home' link at any time return to the home screen shown below. **The desired quarter needs to be selected by clicking on the 'Quarter' dropdown at the top of the home screen to edit or monitor information pertaining to that quarter.**



The 'Users' dropdown is where LEA SMAA coordinators view users by selecting the identifying menu LEA Users. Coordinators will be able to view and edit the TSP list by selecting 'Staff Pool Positions' from the dropdown menu.

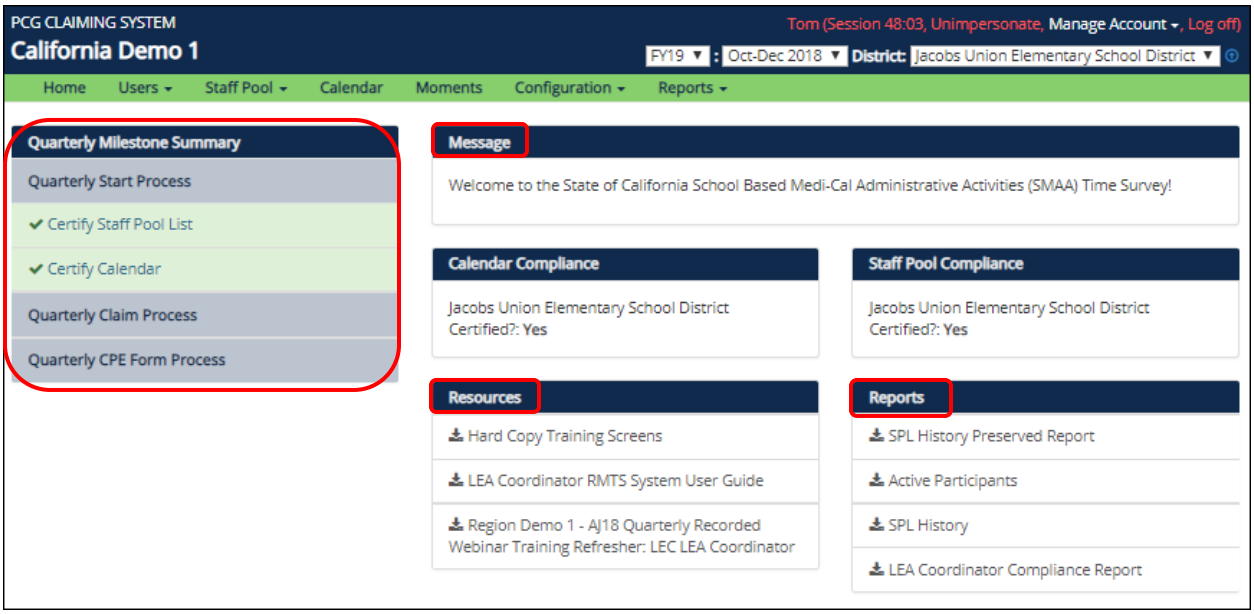
If a LEA SMAA coordinator requires that a system user be added to the system, they must contact their Local Educational Consortia (LEC) coordinator.



Dashboard Features

The diagram below highlights the locations of the following dashboard features:

- **'Quarterly Milestone Summary'** on the left of the 'Home' screen displays the status of the claiming process for each quarter. LEA SMAA 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
- **'Resources'** contains training guides and other important resources
- **'Message'** will display important information to system users
- **'Moment Compliance'** feature allows LEA SMAA coordinators to track the number of total moments that have occurred and how many have been completed throughout a given RMTS quarter
- **'Reports'** feature allows LEA SMAA coordinators to download different spreadsheets depending on the information needed
  - SPL History Preserved – Displays the certified SPL list as it existed at time of sample generation for a particular quarter
  - Active Participants - Displays all LEA participants who are active at the time of running the report
  - SPL History - Displays the finalized snap shot of the LEA time study participant staff pool list from which the sample was drawn for a particular quarter
  - LEA Coordinator Compliance Report - Displays the completion status of moments and corresponding participants in a quarter



Calendar Completion

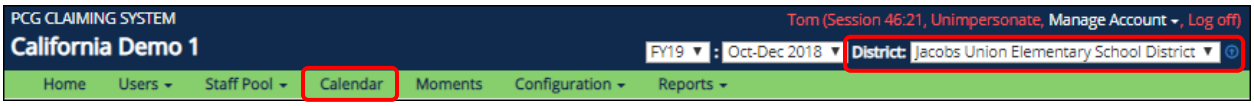
A full year calendar is available for LEA coordinators to enter all non-student attendance days and holidays prior to the start of Q2 (October-December) in order to appropriately calculate the 5 student attendance day

notification and expiration required for the state of California. The LEA coordinator will have the opportunity to enter the entire school year calendar once, and verify the calendar prior to each quarter's start via calendar certification. **Each LEA must certify their calendar each quarter in order for the non-student attendance days to be excluded from being sampled for moments.**

To enter non-student attendance days:

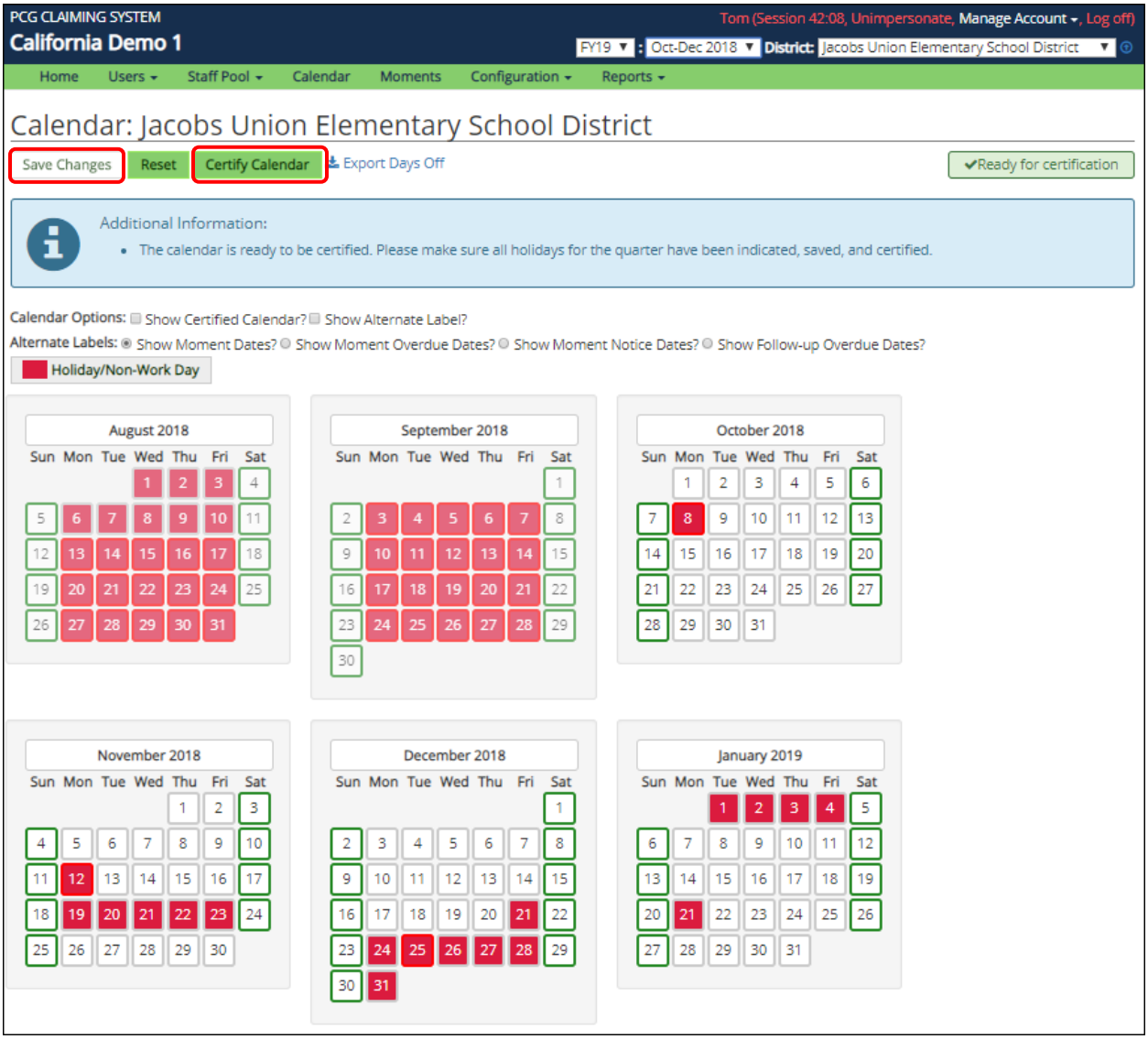
1. Click the 'Calendar' link at the top of the home page.

2. LEA SMAA coordinators will have access to all their tracks/sites by choosing the particular track/site from the 'District dropdown menu next to quarter. This is only applicable if there are multiple approved calendars under the LEA that significantly affect staff work days. In this scenario, each calendar will be required to be certified independently and staff assigned to each location accordingly.



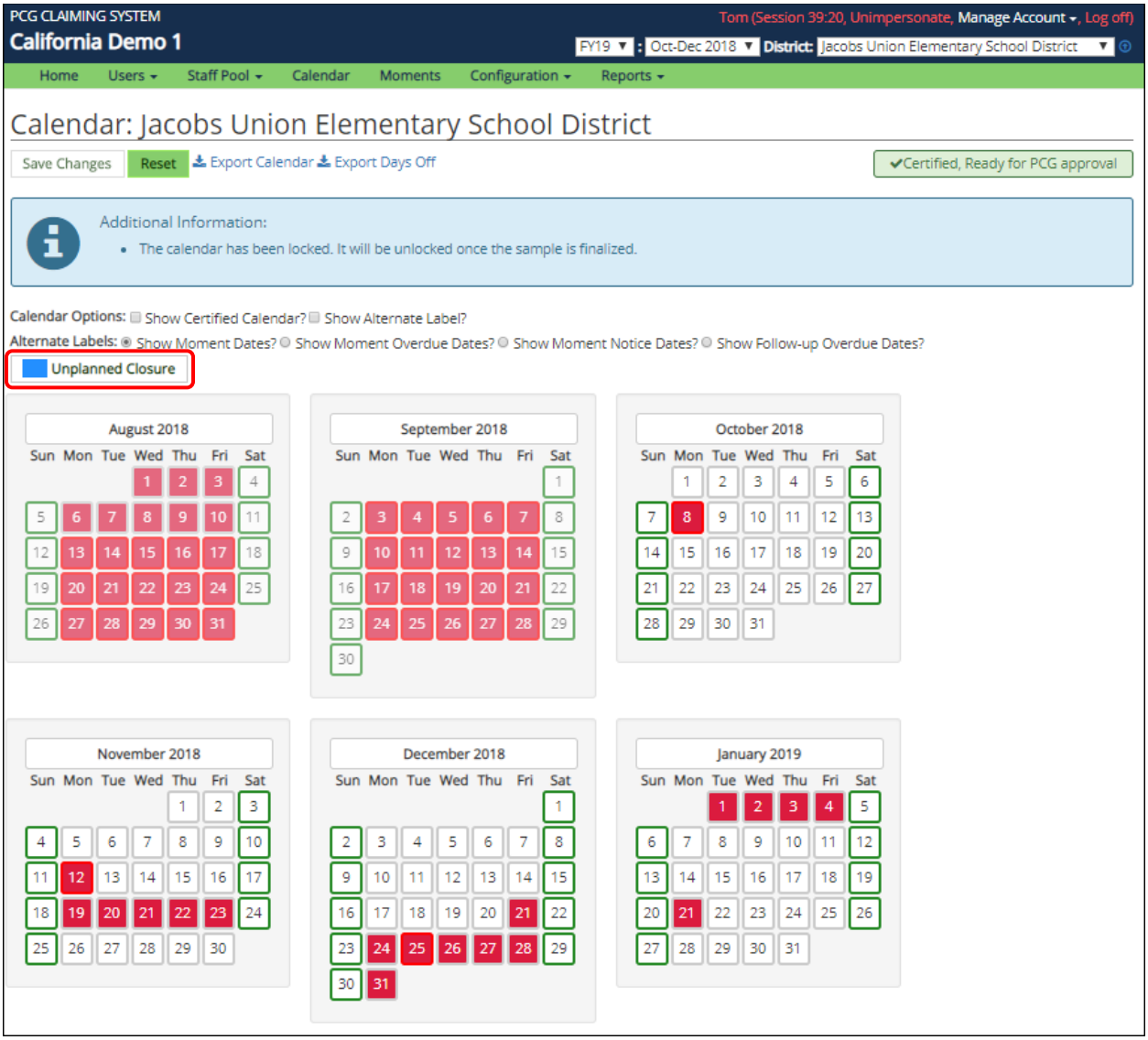
3. Holiday/Non-Work Day is the only selection that indicates non-student attendance days for staff. Select Holiday/Non-Work Day and then click on the days on the calendar that correspond to the days off for the students. If a day is selected in error, simply click it again to unselect.

4. Click 'Save Changes' to lock in the non-work days, review days selected according to approved school calendar, then click 'Certify Calendar'. Contact the appropriate LEC coordinator to make changes to the calendar if certification is selected prematurely and changes need to be made. Only a LEC coordinator can unlock a LEA 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 LEA SMAA 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.

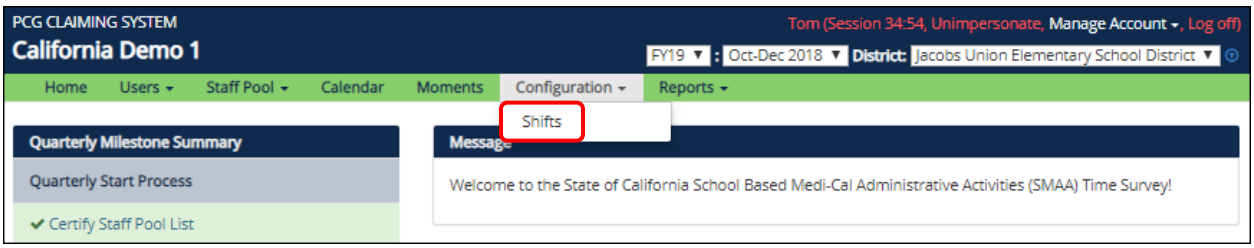


Entering Shifts (Work schedules/hours)

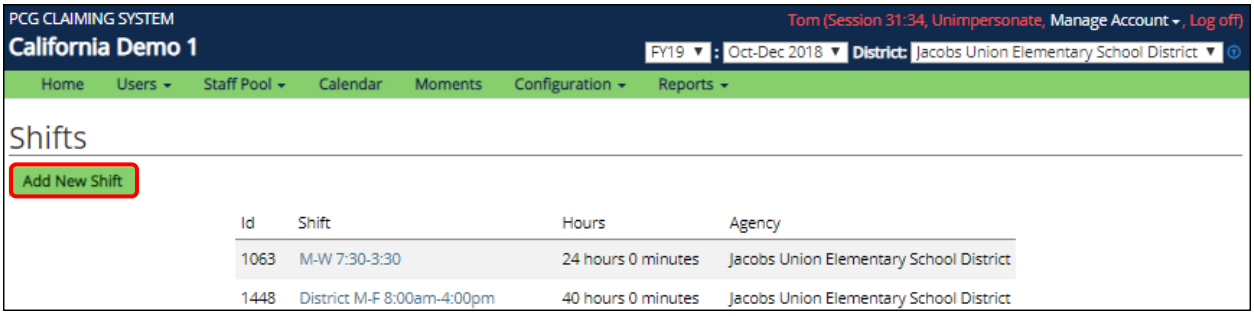
Not every participant on the TSP list begins and ends their work day at the same time. The creation of "shifts" in the PCG Claiming System allows for differences in schedules per LEA to capture the base work schedule for each TSP. A coordinator can create multiple types of shifts for staff that have various schedules.

To create shifts (work schedules/hours):

1. Go to the 'Configuration' dropdown 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 TSP. If there are multiple schools within the LEA, each school can have a specific shift with a start time and duration.

   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
   - Full Time Sunshine Elementary school

4. The 'Position' indicates the order a shift will appear in the dropdown list.

5. Choose the 'Day of the week(s)' for each shift from the dropdown. 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.

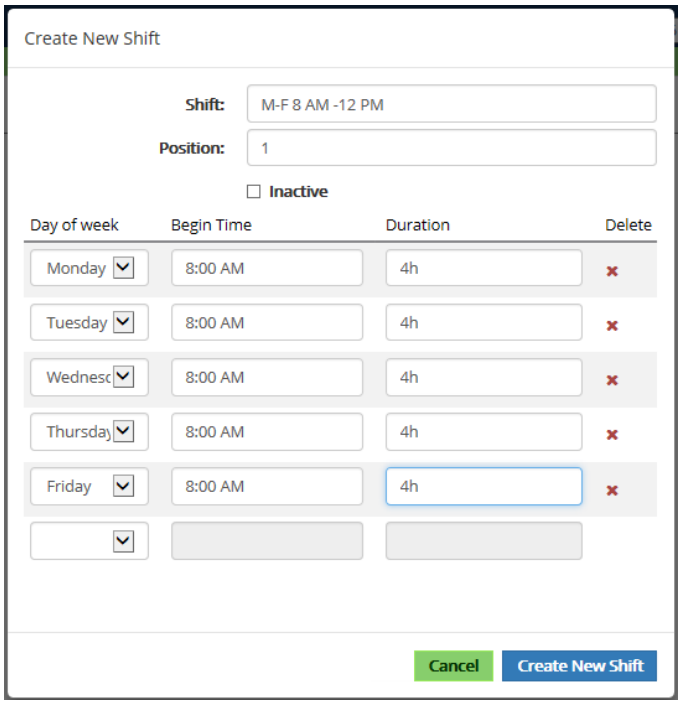
6. Enter the 'Begin Time' in either of the following formats:
   - 8:00 AM/PM; or
   - 13:00 (military time = 1:00 PM)

7. Enter the 'Duration of the shift in the hours and minutes using the following format:
   - #h #m (Ex: 4h 30m)

   Duration is the length of the shift, **not** the ending time. 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.

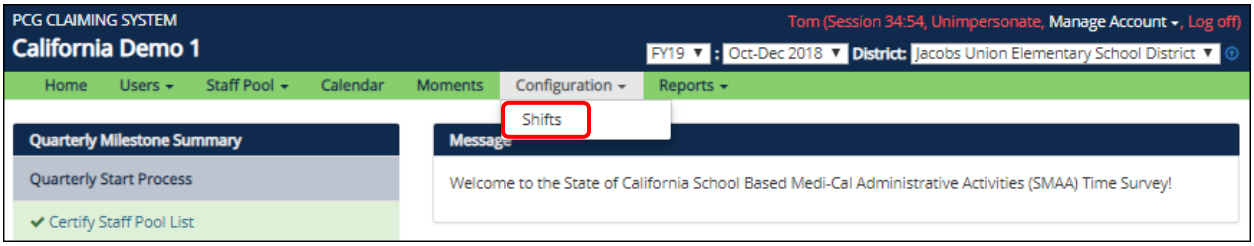
9. The shift will be saved in the system and will then become available in the dropdown list.



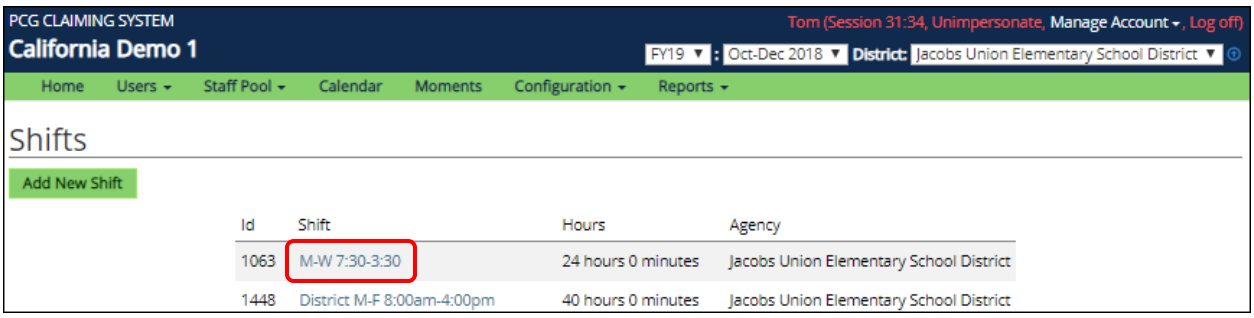
To Edit Existing Shifts:

Once a shift has been created within the system it can be edited any time prior to sample generation as long as the Staff Pool List has been certified. If edits need to be made to an existing shift, please contact your LEC SMAA coordinator to have them unlock your Staff Pool List.

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

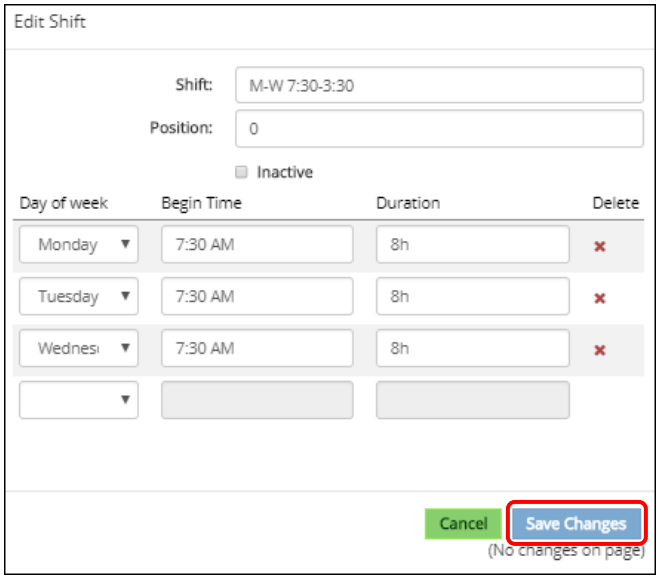


2. Select the shift that you would like to edit by clicking on the blue hyperlink under the Shift column.



3. Make required changes to the established shift's name, position, begin time or duration by replacing the existing text. To delete the Day of 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.

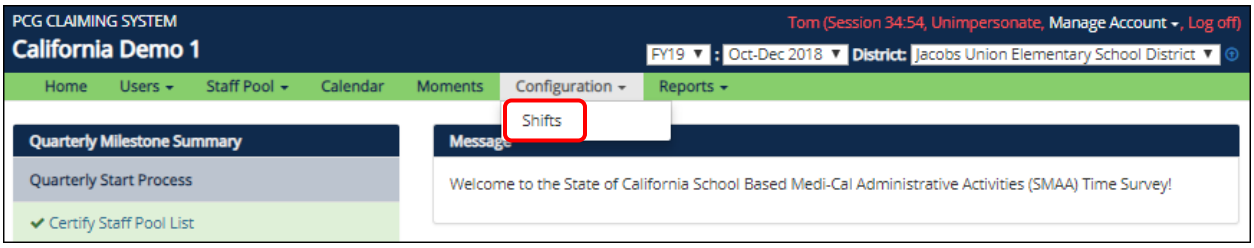
4. Once all changes have been made, click on 'Save Changes' to make changes effective.



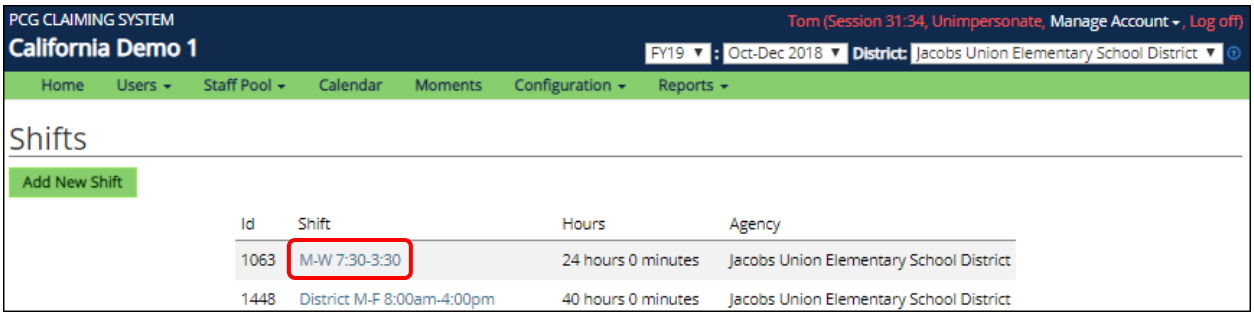
To Inactivate Existing Shifts

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

1. Go to the 'Configuration' dropdown on the home screen and select 'Shifts.'

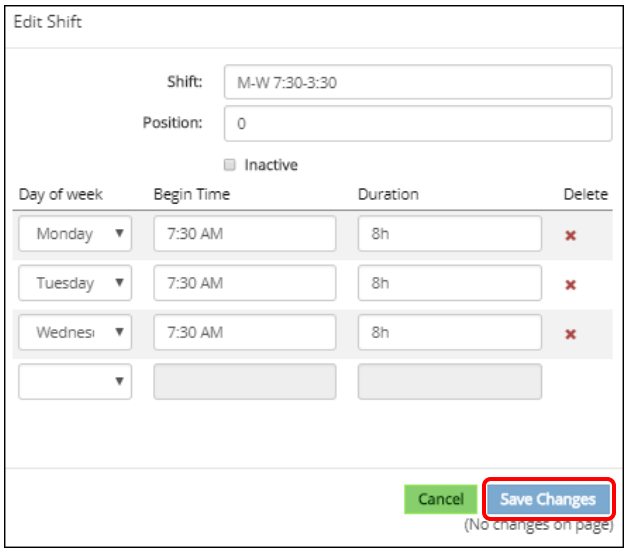


2. Select the shift that needs to be edited by clicking on the blue hyperlink under the 'Shift' column.



3. Select the 'Inactive' text box to inactivate the shift.

4. Once all changes have been made, click on 'Save Changes' to make changes effective.



A shift can be re-activated at any time by selecting the inactivated shift (click on the blue hyperlink under the 'Shift column') that needs reactivation, unselecting the 'Inactivate' text box, and saving changes.

Creating/Updating the Time Survey Participant List

It is important for LEAs to have an accurate TSP list, as the information will be used to include the costs associated with the staff on this list for the quarterly SMAA invoice. LEA SMAA coordinators update their TSP list once per quarter using the web-based PCG Claiming System.

All LEAs participating in the RMTS must complete the certification process to have their TSP list included in the sample. TSP lists that have not been certified will not be included in the sample and those LEAs will not be considered as participating during the quarter.

Once the TSP list has been certified, it is locked and only changes to last names and email addresses can be made in the PCG Claiming System. If additional updates and /or changes are needed, the LEA SMAA coordinator must contact their LEC coordinator to request to have the TSP list unlocked to make any additional updates/changes. If the TSP list is unlocked, the LEA SMAA coordinator must complete the certification process again.

Once the quarterly sample has been generated, updates to TSP email addresses and name corrections can be made and will take effect immediately. Any changes in status, or the addition of new TSPs, 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.

Participant Pool 1 – Direct Service & Administrative Providers - Participant Pool 1 is comprised of direct service staff and the respective costs for these staff. This pool includes those who conduct any direct service, even if they also conduct administrative services. These costs include staff time spent on billing activities related to direct services.

- Audiologist with Valid Credential
- Certified Nurse Practitioner
- Credentialed School Counselor
- Credentialed School Psychologist
- Credentialed School Social Worker
- Licensed Audiologist
- Licensed Clinical Social Worker
- Licensed Educational Psychologist
- Licensed Marriage and Family Therapist
- Licensed Optometrist
- Licensed Physical Therapist
- Licensed Physician/Psychiatrist
- Licensed Psychologist
- Licensed Registered Nurse, including registered credentialed school nurse and certified public health nurse

- Licensed Speech-Language Pathologist
- Licensed Vocational Nurse
- Other positions approved by CMS for the LEA Medi-Cal Billing Program SPA
- Program Specialist
- Registered Occupational Therapist
- Registered School Audiometrist
- Speech-Language Pathologist with a Valid Credential
- Trained Health Care Aide

Participant Pool 2 - Administrative Service Providers Only - Participant Pool 2 is comprised of administrative claiming staff only and the respective costs for these staff. Staff should be included in Participant Pool 2 only if they perform allowable Medicaid administrative activities on a regular basis.

- Coordinator- Various Selected Positions (Medi-Cal, Mental Health, Speech, Nursing, etc.)
- Director- Various Selected Positions (Mental Health, Speech, Nursing, etc.)
- Education Aides
- Medical Interns
- Health Care Advocate
- Health Center Manager
- Health Services Special Education Teachers
- Instructor, Orientation and Mobility (Visually Handicapped)
- Interpreters & Interpreter Assistants
- Medical Administrative Coordinator / Assistant
- Medical Assistant
- Medical Interns
- Office Technician / Sr. Office Technician
- Organization Facilitator
- Orientation & Mobility Specialist
- Parent Community Facilitator / Liaison
- Placement Assistant
- Principal and/or Assistant Principal
- Principal at Special Education Schools
- Professional Expert
- Pupil Support Services Administrators
- Pupil Support – Technicians
- School Bilingual Assistants
- Secretary, Sr. Secretary
- Sign Language Interpreter
- Special Education Administrators
- Special Education Assistant
- Special Education – Support Technicians

- Student Support Services coordinator / Case Manager
- Teacher- Various Selected Positions (Special Ed., Alternative Ed., Resource, SDC)
- Translator / Sr. Translator
- Transportation Planner / Router
- Other groups/individuals that may be approved by DHCS

Important notes regarding adding staff onto the Time Study Participant List: Consider each staff member and their job duties individually. Staff should conduct reimbursable activities on a regular basis or as a regular part of their job. The LEA SMAA coordinator should verify that each staff meets the criteria prior to adding to the TSP list. It is imperative that TSPs are placed in the correct Participant Pool and job category based on their actual job title within the LEA.

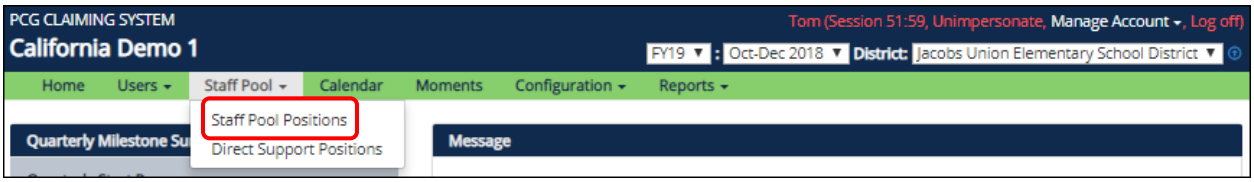
Notes on the Time Study Participant List:

- TSP lists must be submitted and certified in the PCG Claiming System on a quarterly basis
- A staff member can only be included in **one** participant pool
- Participant pools are mutually exclusive
- Do not include any TSPs who are 100% federally funded
- Staff must be included on the TSP list in order for costs to be included in quarterly SMAA invoice
- Each staff person should be considered individually for the TSP list - job title alone does not automatically qualify a staff person for the program

Once LEA SMAA coordinators have decided who to include on their TSP list, utilize the PCG Claiming System to create, update and submit this list. The following sections will explain how to access the site, edit, submit, and certify the TSP list. For additional information, please refer to the CA SMAA Manual by DHCS.

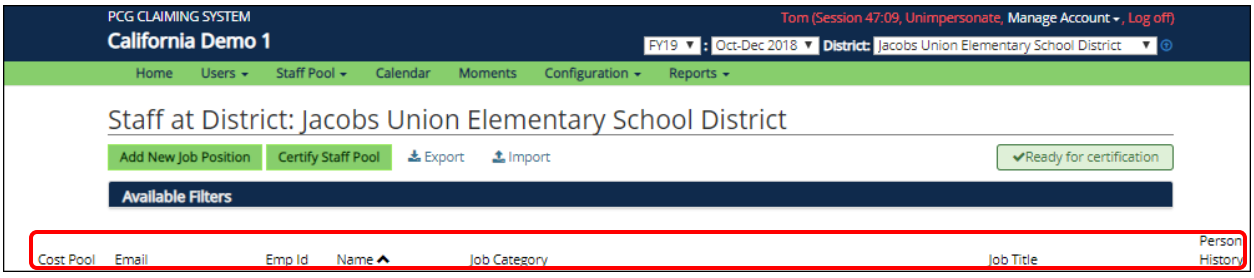
View, Create, and/or Update the TSP List

To view, create, and/or update the TSP list, click on the 'Staff Pool' 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 PCG Claiming System.



Click on the 'Staff Pool Positions' link on the 'Staff Pool' dropdown. All current active job positions included in the staff pool will appear with the following information:

- Cost Pool (Direct Service and Administrative Providers or Administrative Service Providers)
- Email
- Emp Id
- Name
- Job Category
- Job Title
- Person History

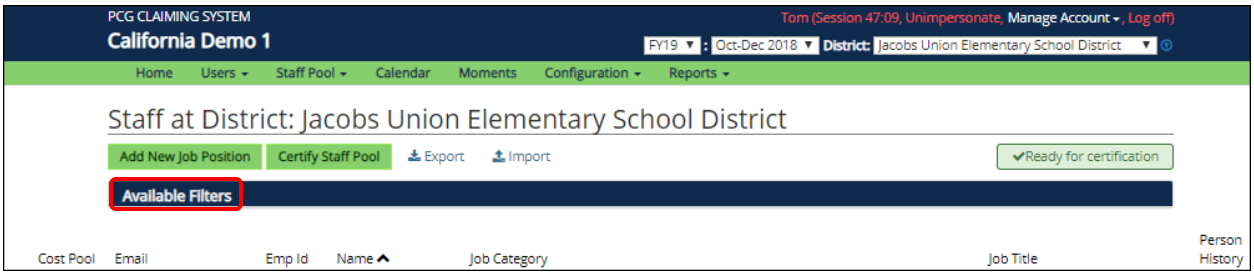


Filtering the Time Study Participant List

It is possible to filter the TSP by clicking 'Available Filters'

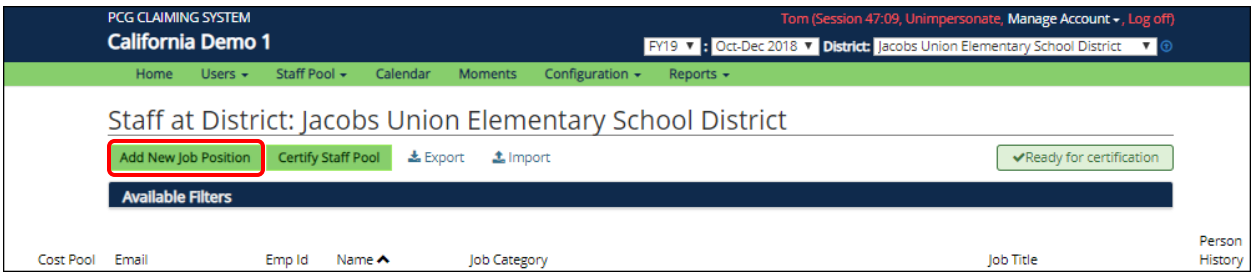
Select the desired cost pool, job category, email, first name, or last name, either individually or in combination with each other. Once the desired criteria has been selected, select "Filter" to display the results for all TSPs. To review the TSP list in its entirety, leave all the search fields blank and select "Filter". The staff that match the search criteria will display.

The staff members that meet the search criteria selected will be displayed.

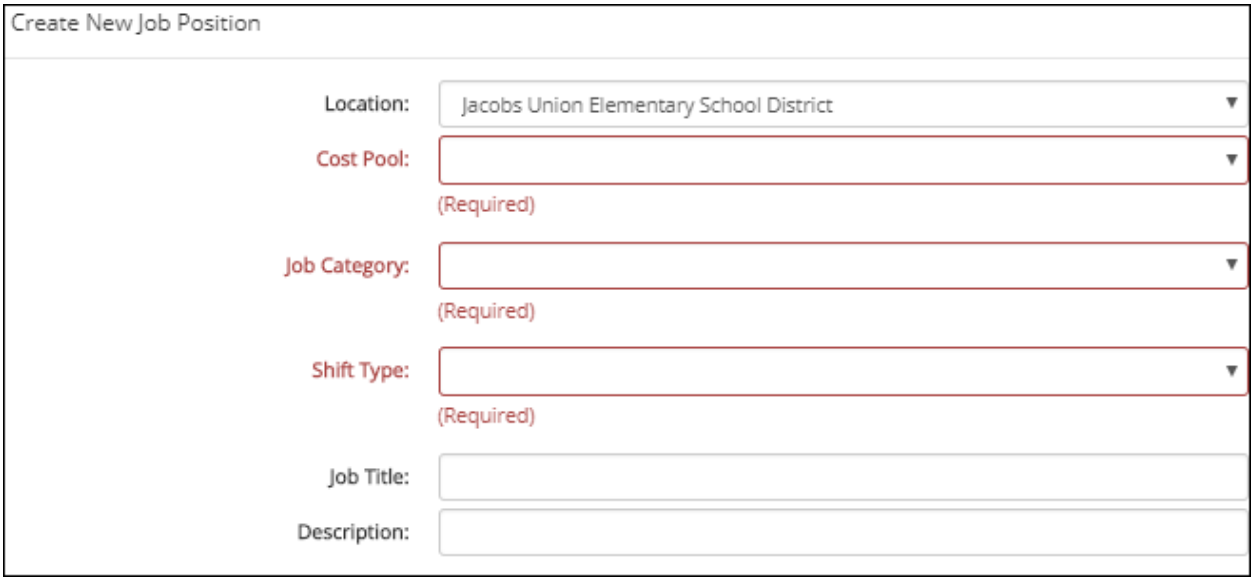


Adding a New Job Position

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.



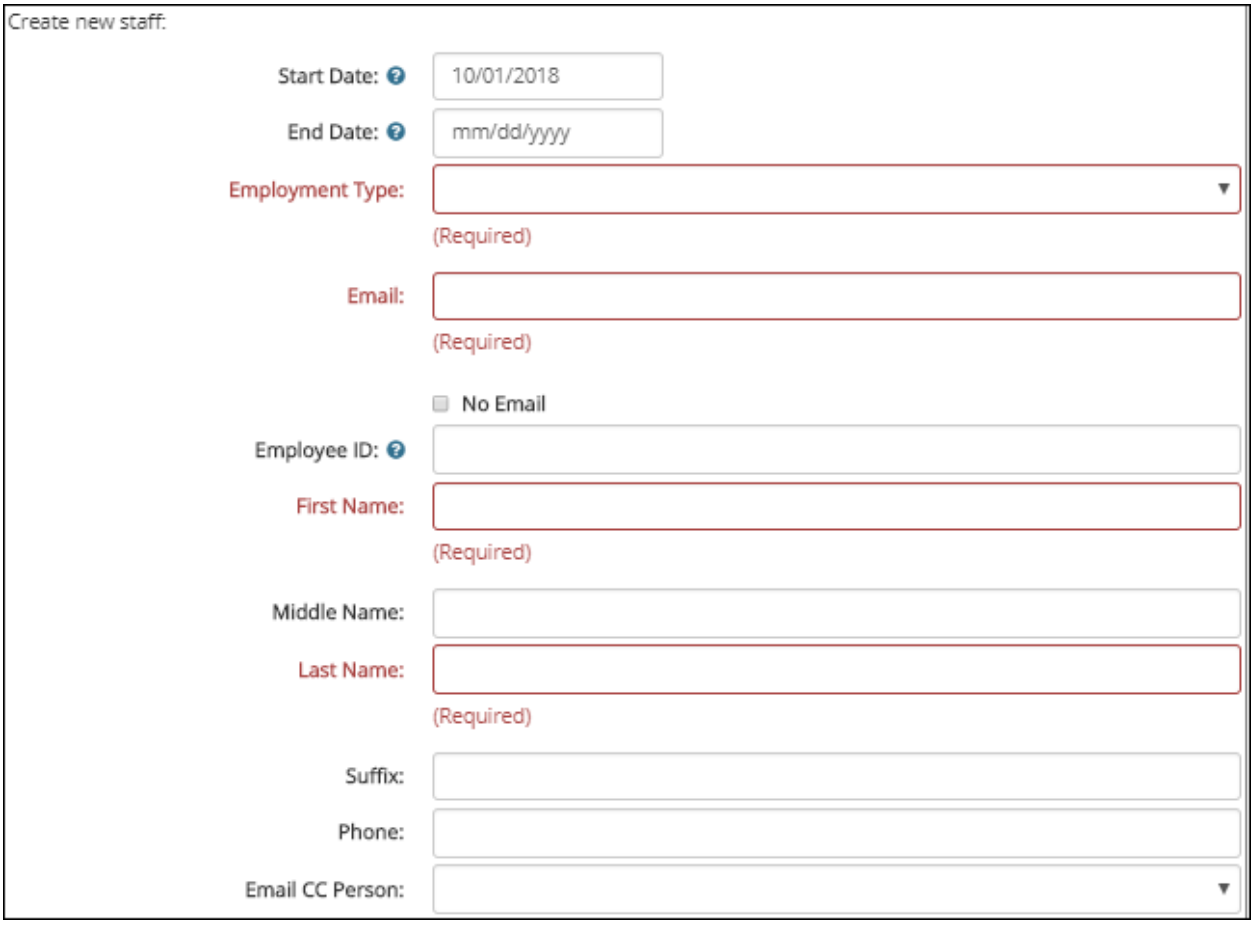
2. The required fields below will appear:
   - Cost Pool - A dropdown menu with the cost pools allowed
   - Job Category - A dropdown menu with job categories allowed in that cost pool
   - Shift Type - A dropdown menu with all shifts (work schedules) listed created by the coordinator
   - Job Title - The TSP's official district job title
   - Description – Not a required field but can be used for any purpose



3. Enter the required information and leave the 'Action' field as 'Fill With New' from the dropdown.

4. Complete the new TSP information by entering:

- Start Date – This should be the first day of the first RMTS quarter TSP is being included on the TSP list unless they are a replacing another TSP in the middle of the quarter in which case it will be the start date of employment
- End Date – The date the employee stopped working in the position or under the specified employment status in mm/dd/yyyy format
- Employment Type – A dropdown menu to select District Payroll or Contracted
- Email - If this field is left blank, the TSP will be assigned hard copy moment notifications
- Employee ID – LEA issued employee ID
- 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, if one specific person is not selected all of the people in the dropdown will be CC'd on late notifications

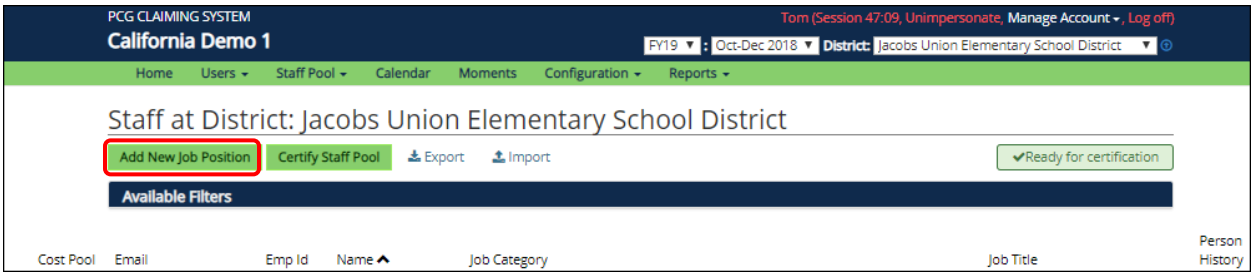


5. Click 'Create New Job Position' or cancel to abort new job position and return to the TSP list

Filling a New Position with an Existing Staff

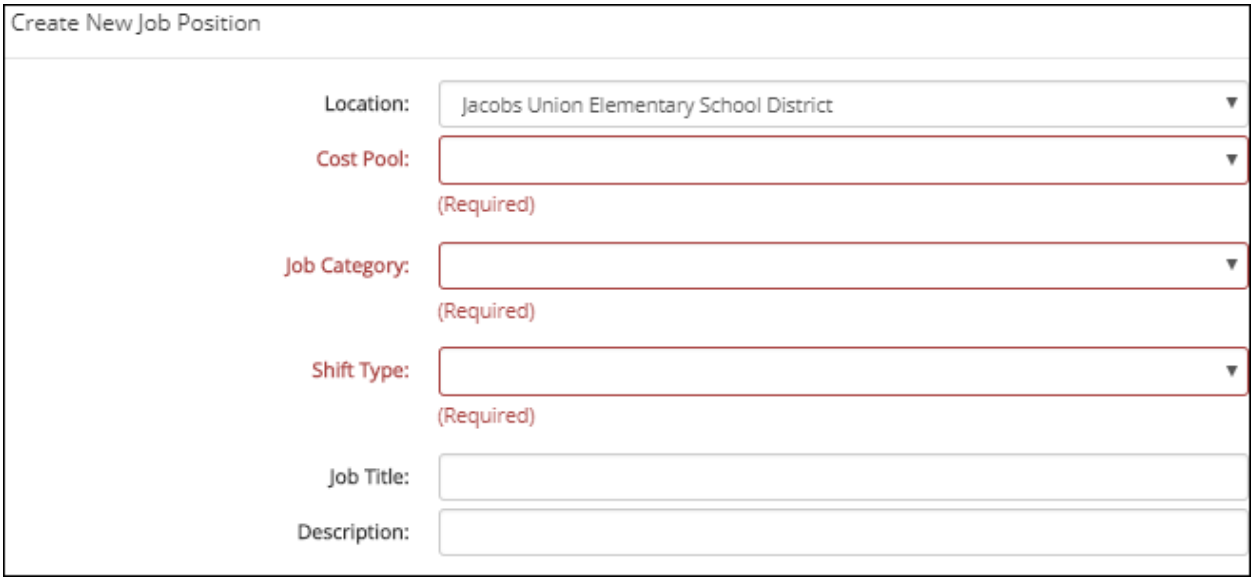
If a TSP has been employed by the LEA previously and has been rehired, or has participated in the time survey but is not currently included on the TSP list, create a new position and fill it with their previously entered information.

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.



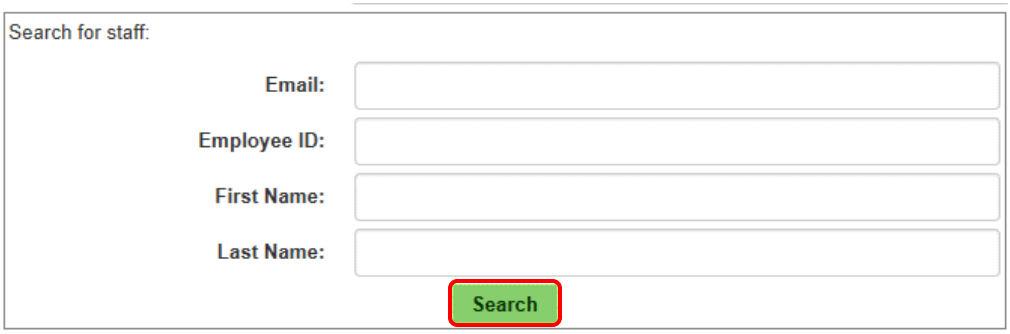
2. The required fields below will appear:

- Cost Pool – A dropdown menu with the cost pools allowed
- Job Category – A dropdown menu with job categories allowed in that cost pool
- Shift Type – A dropdown menu with all shifts (work schedules) listed created by the coordinator
- Job Title – The TSP official district job title
- Description – N ot a required field but can be used for any purpose



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 TSP 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.

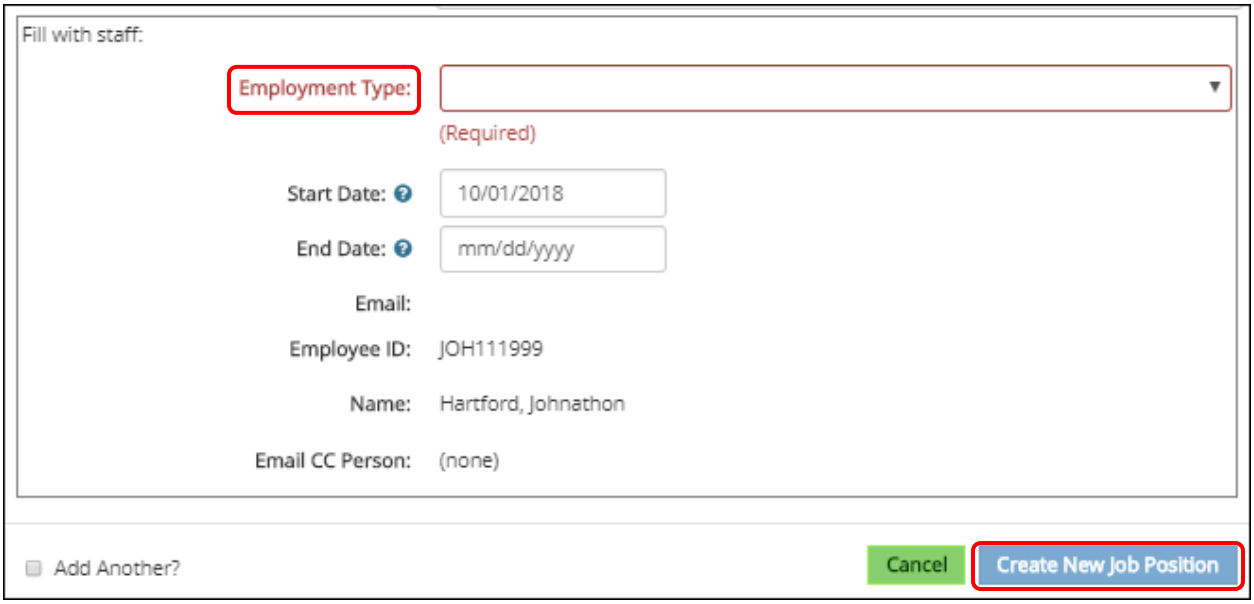
4. Search for the staff person by entering specific criteria in the search fields



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 TSP is inactive and can be selected to fill the position. 'No' in the 'Inactive' column means the staff is active in the LEA. Only a TSP that is not assigned to a current position (having a 'Yes' in the 'Inactive' column) can be selected.

5. Click the 'Fill' button once the desired staff is located to populate the job position. Select the Back button to redo search criteria or to return to the adding participant screen

6. Enter 'Employment Type' and the 'Start Date' that the existing staff person is beginning the new position. The system will default to the first day of the quarter.

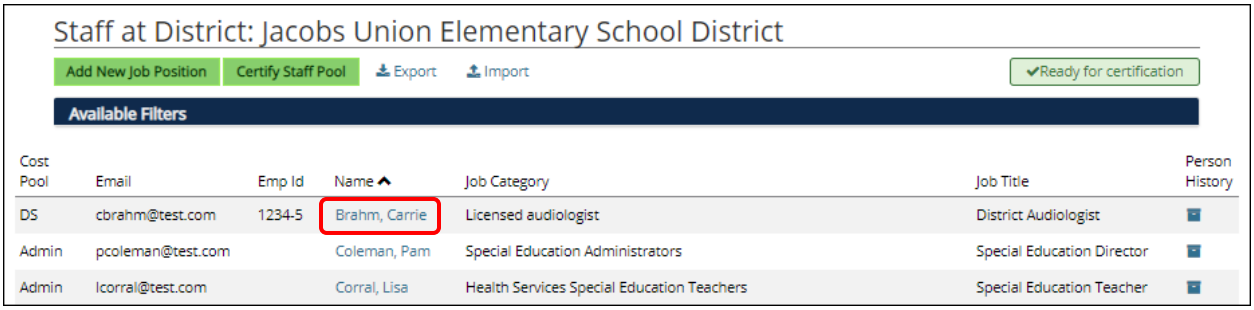


7. Then select 'Create New Job Position' to save it.

Deleting a Staff Person and a Position

TSP lists are updated quarterly. If a TSP is no longer employed within the LEA, or should no longer be included on the TSP list for the upcoming quarter, they should be 'deleted' from the TSP list.

1. Select the staff person and position to delete.

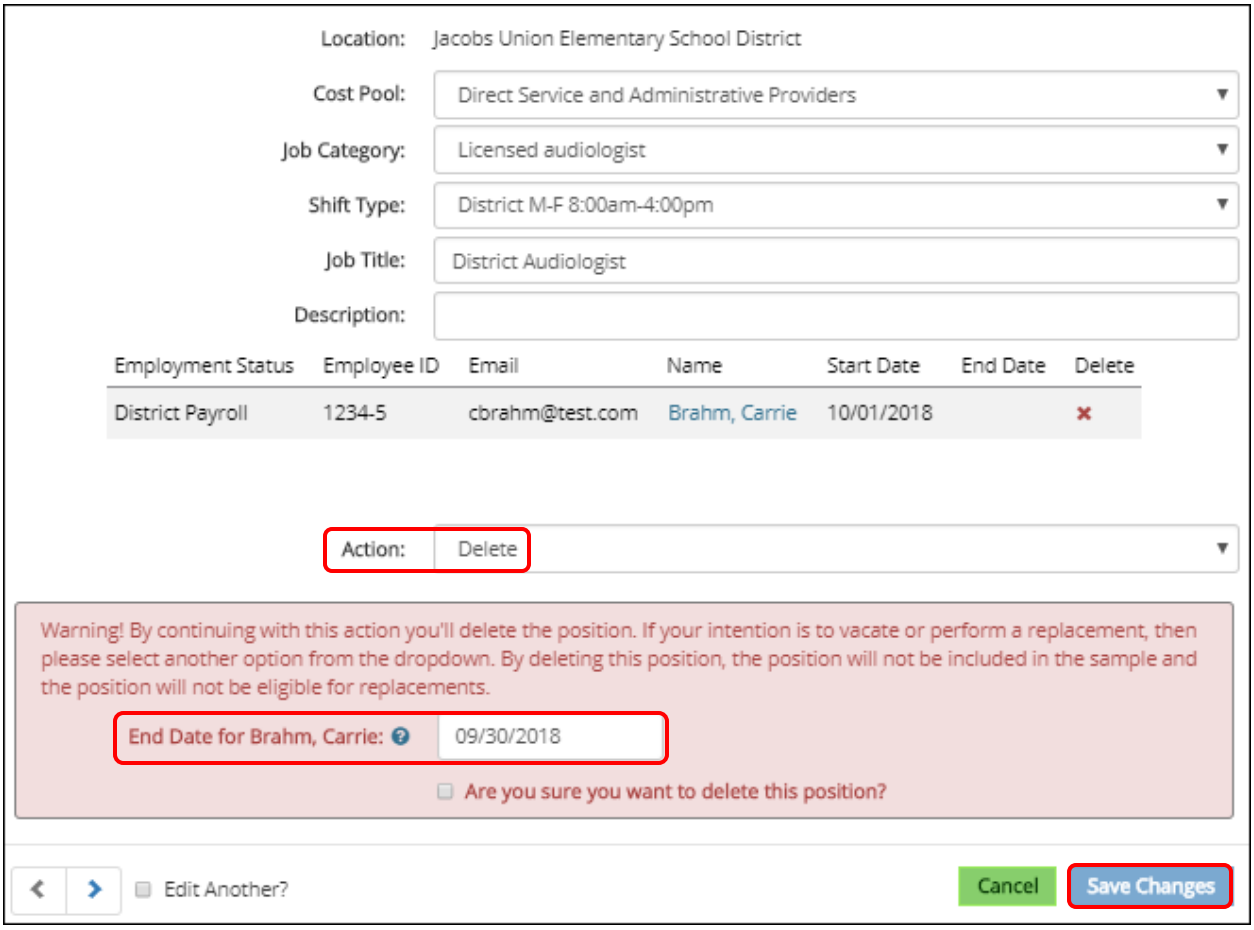


2. Scroll to the 'Action' dropdown box to select 'Delete'

3. Enter 'End Date' of employment

4. To confirm that you would like to delete the TSP from the TSP list, click on the box labeled 'Are you sure you want to delete this position?'

5. Then click on the 'Save Changes' button to delete the TSP from the current list.



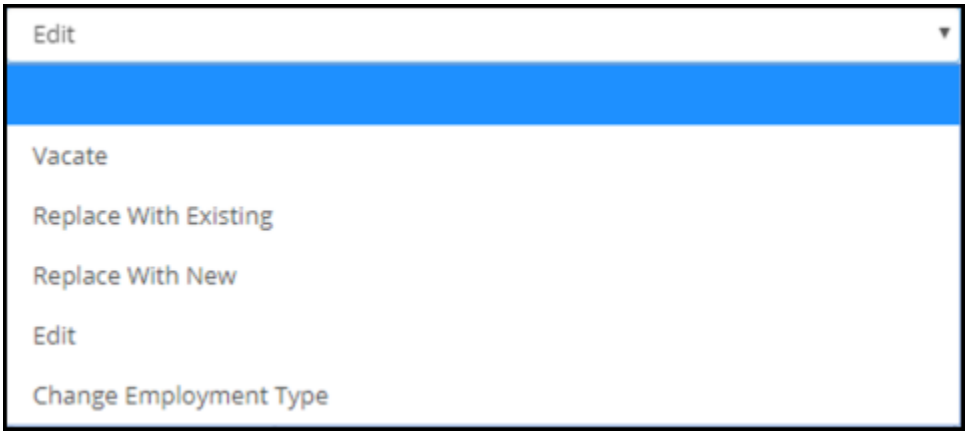
Reactivating a Job Position

If a TSP returns to the LEA that was at one time inactivated, the LEA SMAA coordinator will need to create a new job position but can fill it 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' dropdown menu (available once a TSP is selected) allows users to perform the following actions:

1. Vacate – Use this action for employees who are no longer with the LEA, or should no longer be participating in the SMAA program with the LEA. TSP who will not be replaced and should be removed will require the date the TSP vacated the position. **Please note: ALL updates should be made in the quarter they occurred in.**
2. Replace with Existing – Replace the TSP with another staff (existing) during the quarter
3. Replace with New – Replace the TSP with a member who is not already participating with the current LEA.
4. Edit – TSP Last Name, Email Address
    a. Users must first select the check box: *'Check to enable editing of last name/email ONLY if you are NOT performing a replacement. To Perform a replacement please select an appropriate option'*
5. Change Employment Type – District Payroll or Contracted



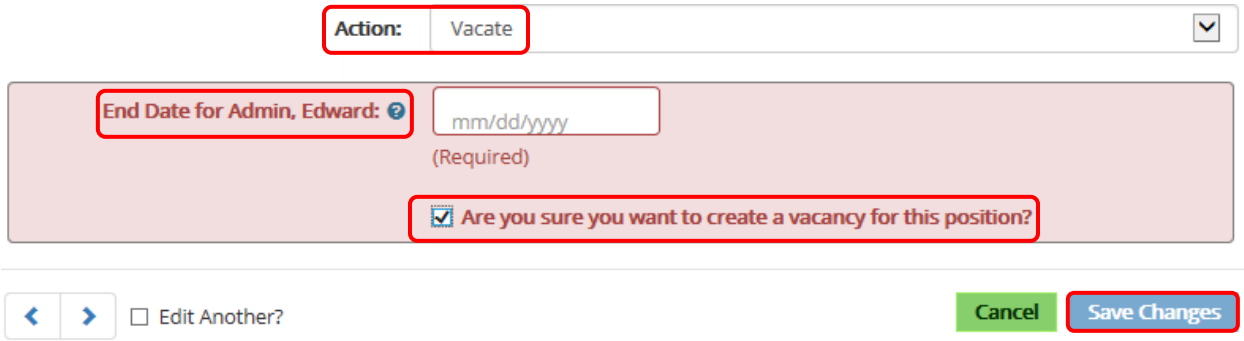
Replacing a Staff Person

1. Select the link on the name of the staff person to replace
2. Scroll to the 'Action' dropdown' box to make a selection:
    a. Vacate
    b. Replace with Existing
    c. Replace with New
    d. Edit

e. Change Employment Type
f. Delete

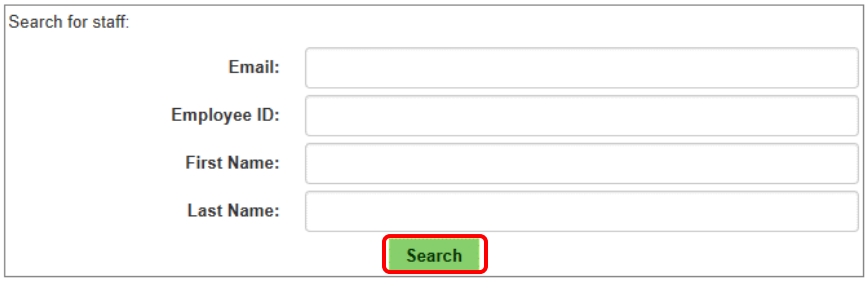
Vacate

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 LEA, or is no longer appropriate to be included on the TSP list, they should be deleted. Enter the date the staff person vacated the position. Enter any other identifying information about the position in the job title field such as school building, room number, etc. Click the check box indicating assurance of creating a vacancy and select 'Save Changes'.



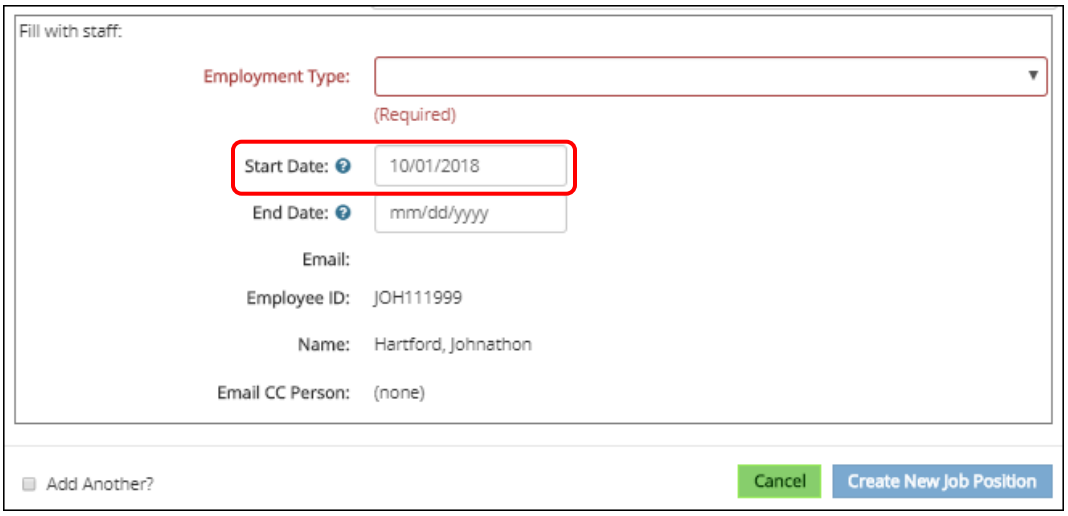
Replace with Existing

Search for the staff person by entering specific criteria in the search fields



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 TSP is inactive and can be selected to fill the position. 'No' in the 'inactive' column means the staff is active in the LEA. Only a TSP that is not assigned to a current position (having a Yes in the 'Inactive' column) can be selected. Select 'Back' button to redo search criteria or to return to the adding TSP screen.

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 'Create New Job Position' to save it.

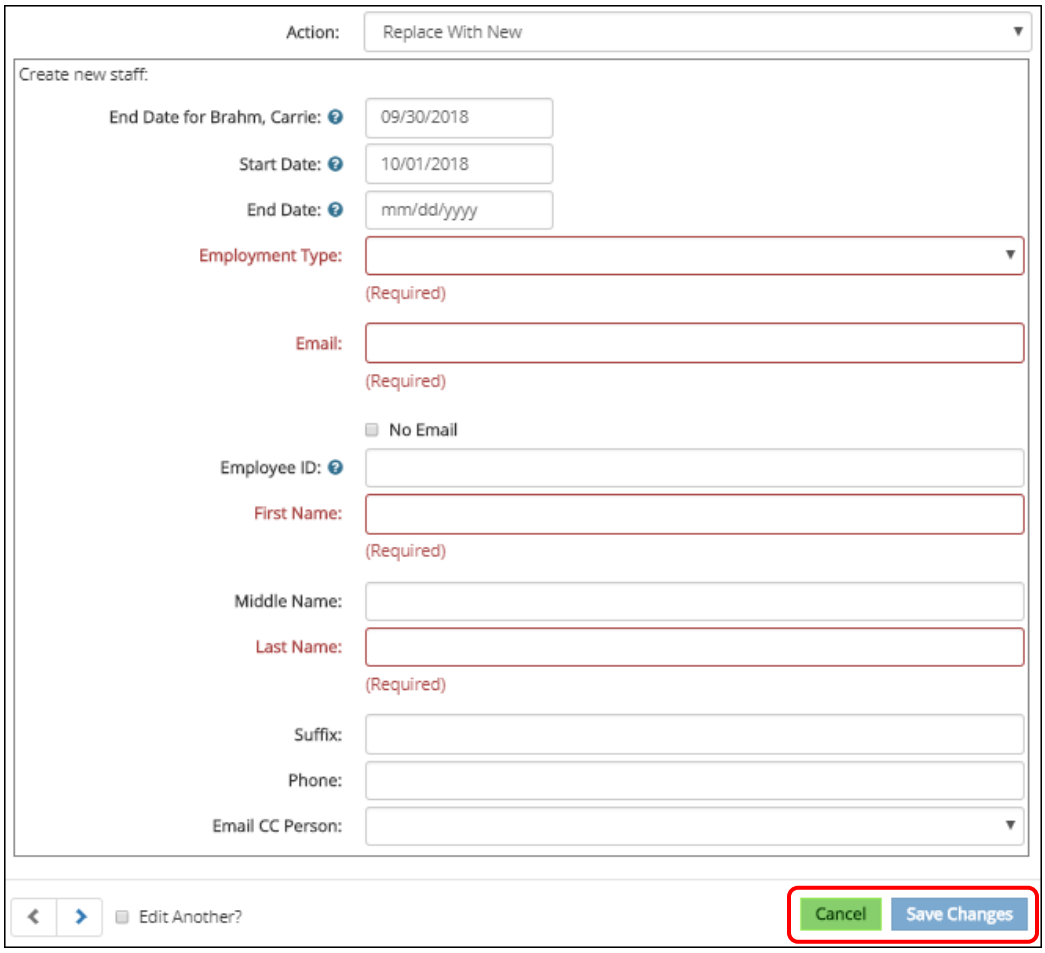


Replace with New

Complete the new staff person information by entering:

- End Date (for previous TSP) – The date the previous employee stopped working or changed employment status
- Start Date – This should be the first day of the first RMTS quarter TSP is being included on the TSP list unless they are a replacing another TSP in the middle of the quarter in which case it will be the start date of employment
- End Date -The date the employee will stop working in the postion or under the sepcific status
- Employment Type - A dropdown menu to select District Payroll or Contracted
- Email - If this field is left blank, the TSP will be assigned hard copy moment notifications
- Employee ID – LEA issued employee ID

- 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, if one specific person is not selected all of the people in the dropdown will be CC'd on late notifications
- Click 'Save Changes' or cancel to abort new job position and return to the TSP list



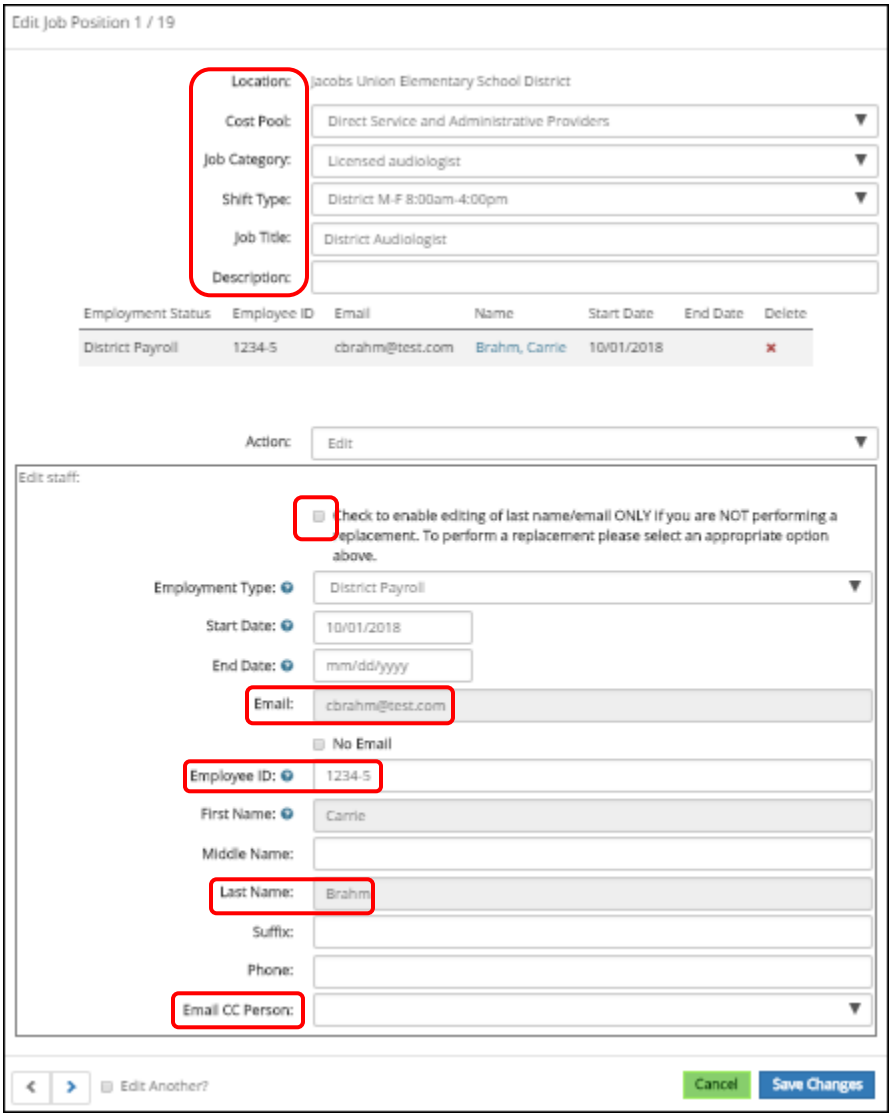
Editing a Staff Person

If information needs to be updated for a staff person, such as email address, name, or job title, follow the following steps:

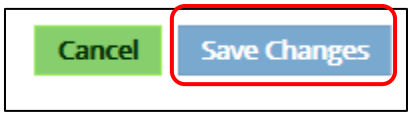
1. From the 'Staff Pool Position' screen, job position information may be edited by selecting the link on the desired TSP's name

2. The selected TSP 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 dropdown menus. Users are able to make updates to the job position's Cost Pool, Job Category, Shift Type, Job Title, Description, Employment Type, Email, Employee ID, Last 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.***



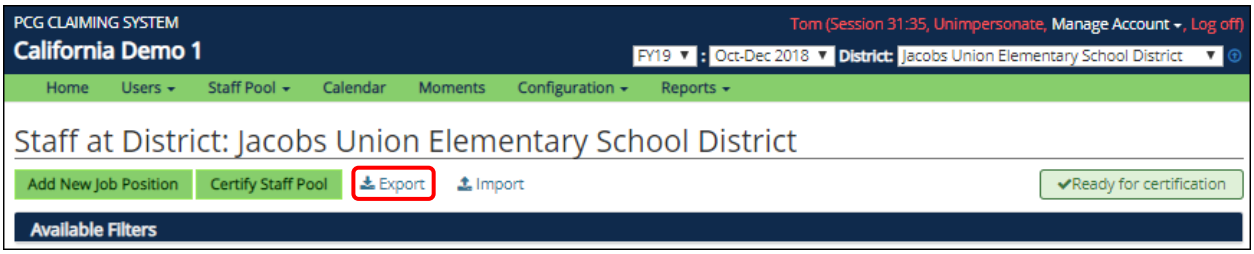
4. Once all the necessary changes have been made, click the 'Save Changes' button at the bottom of the screen to save the updated information.



Exporting and Importing the TSP

Another option for making TSP list updates is using the '**Export'** feature. This feature allows you to use Excel to make changes/updates and import the list. Complete the following steps to export the TSP list:

1. Click on the link at the top of the 'Staff Pool Positions' screen to export the TSP list



2. The Excel workbook file name can be changed, but it must be saved as an **Excel file.** The worksheet in the Excel export must remain titled **splexport**. Any other title will prevent the TSP list workbook from loading into the PCG Claiming System

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 TSP, 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 – Enter the applicable cost pool for the new TSP
   b. Agency Name – Enter the full LEA name
   c. Parent Agency Name – Enter region or agency that the LEA participates under
   d. Job Span ID - System generated number that is included in the export for existing TSPs that should be left blank for new and should not be edited for existing TSPs
   e. Job Position ID - System generated number that is included in the export for existing TSPs and that should be left blank for new and should not be edited for existing TSPs
   f. Job Category Name – Enter one of the approved job categories exactly how it is listed (maintain all of the same capitals, punctuation, and characters if applicable)

g. Job Title – Enter TSP's official LEA job title

h. Description - Not a required field but can be used for any purpose

i. Shift Type Name – Enter the name of the shift established in the system that is appropriate for the TSP (go to Configuration menu then Shifts to see list in PCG Claiming System)

j. Last Name – Enter last name of TSP

k. First Name – Enter first name of TSP

l. Middle Name – Enter the middle name of TSP (if applicable)

m. Email – Enter the TSP's unique email address. If the participant does not have an email address, then Employee ID is required

n. Employee ID – This is a required field. Enter the LEA 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 'District Payroll' or 'Contracted'

p. New Person – Populate with a 'Y' or 'Yes' if the row is adding a new TSP

q. Update Last Name or Email - Populate with a 'Y' or 'Yes' if the row contains changes to the TSP last name or email address

r. Delete Job Span – Populate with a 'Y' to delete the participant from the position. This is the same action as clicking the red 'X' from in the system within the same quarter that a TSP is added

s. Begin Date – Enter the employee start date in MM/DD/YYYY format (to be the first date of the quarter start unless TSP is a replacement in which case the exact hire date should be used)

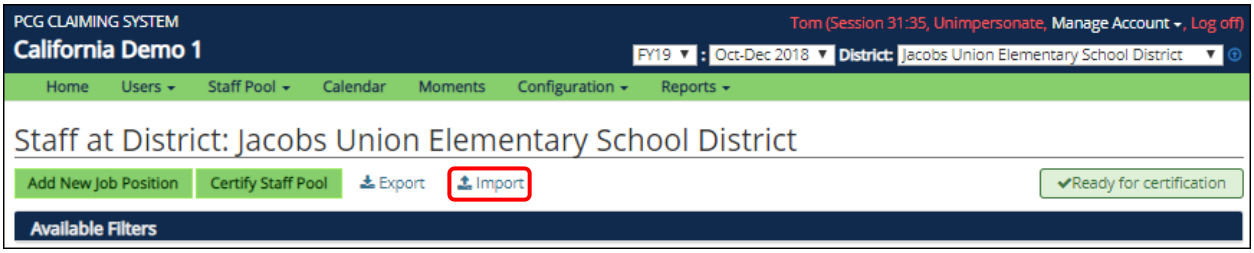
t. End Date – Enter the end date of the TSP if you would like to remove them from the TSP list. End dates cannot be before the last day of the previous quarter via import.

u. Inactivate - Enter a 'Y' if you are removing a TSP from your TSP list

5. To edit a TSP, locate the TSP in the Excel export file, make the necessary update in the appropriate column. Make sure to enter 'District Payroll' or 'Contracted' in the **EmploymentStatus.Name** column if it is blank.

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:

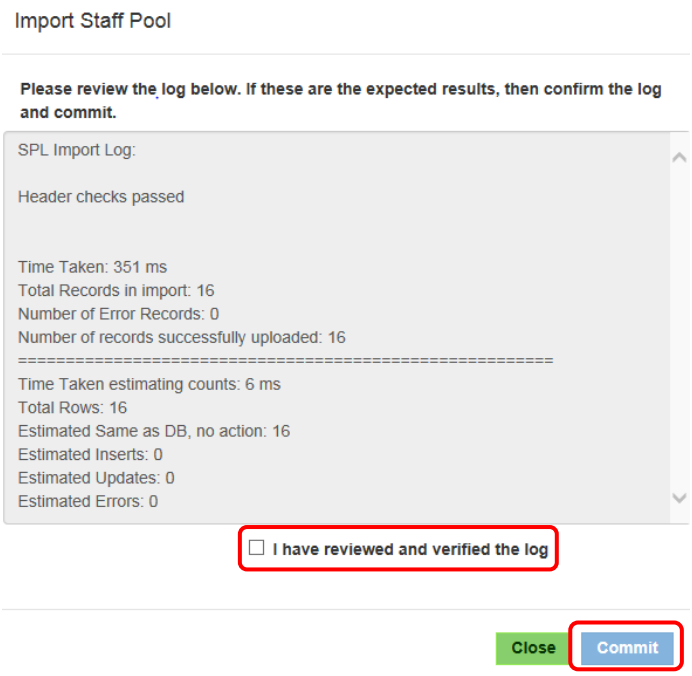
1. Click on '**Import'** at the top of the Staff Pool Position screen.



2. Click '**Browse**' to locate the updated TSP list file

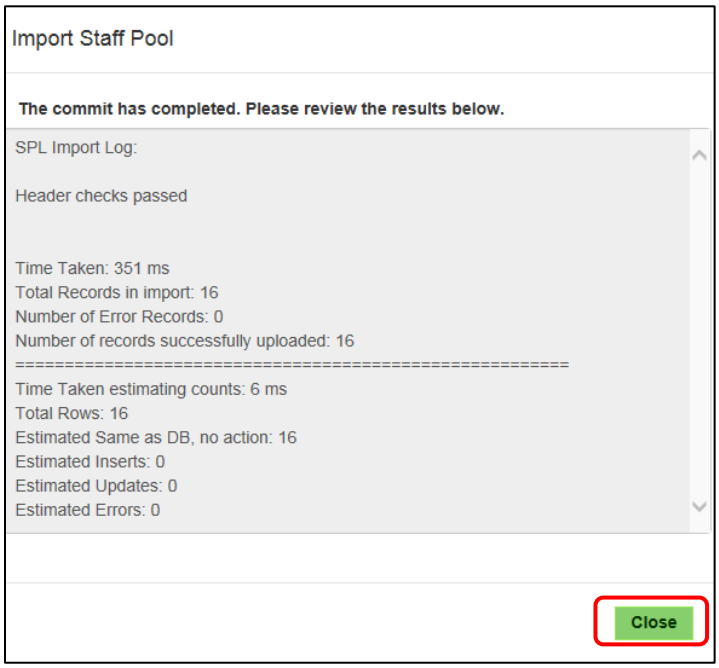
3. After you have located the file, click on '**Upload**' to import the updated TSP list to the PCG Claiming System

4. 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.



5. 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
    - Entering Shift names that do not currently exist in the system
    - Duplicate entries (TSP already exists in the site)
    - Unauthorized worksheet name change
    - Employment Status field is blank for any TSP (even TSPs where no changes were made)

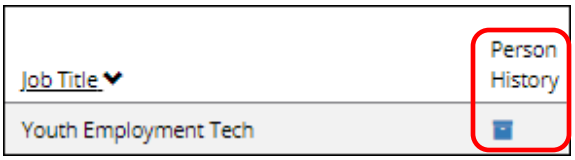
6. If no errors have been detected the file will load successfully and you will receive a confirmation email in addition to the confirmation screen below. Click 'Close' to return to the TSP list. It is very important that the TSP list is reviewed for accuracy prior to certification.



Person History

Coordinators have the ability to view TSP name and email changes by selecting the 'Person History' icon listed next to each TSP in the claiming system

- Changes only made to name and email addresses will appear
  - Change Type (Name or Email Address, Old Value, New Value, Changed By (email user executing the change)
  - When a replacement is executed:
    - The icon will display the name/email address history of the last person in the position
    - If a person was never attached to the position, the icon will not be available since there is no person history
  - Name/Email address change history is unique and is displayed in all quarters regardless when the change was executed

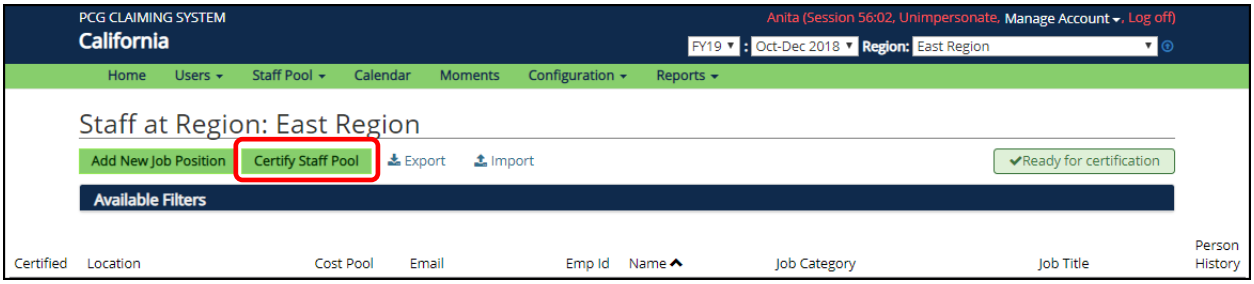


Certifying the Staff Pool List

After all updates have been completed, the coordinator must certify the TSP list. Before certifying the TSP list, please be sure the list is accurate and complete. **Please note that you must certify your TSP list to be included in the time study for the quarter.**

1. Click on the 'Staff Pool Positions' link from the 'Staff Pool' dropdown on the 'Home' screen.

2. The TSP list will display. Select the 'Certify Staff Pool' box to certify the TSP list.



If the list has been successfully certified, the system will display a message with a time stamp of when the TSP list was certified as well as the name of the user who certified the list.

Reports

Select the 'Report' dropdown from the home screen to see a list of all available reports.

A list of reports available to the LEA SMAA coordinator to help manage the PCG Claiming System are as follows:

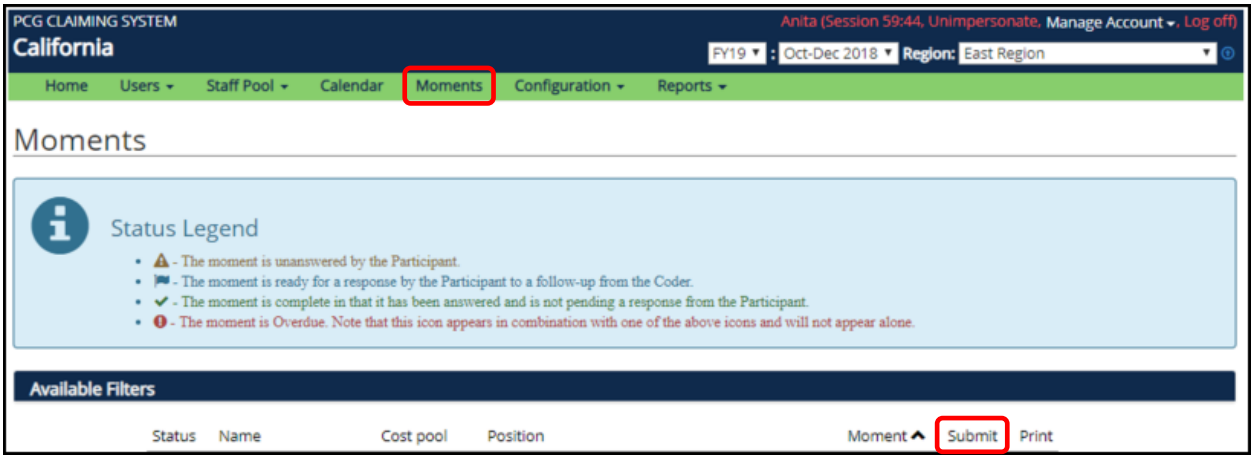
- SPL History Preserved – Displays the certified SPL list as it existed at the time of sample generation for a particular quarter
- Shift Report – Displays all active and inactive shift that are currently entered in the system
- Active Participants – Displays all participants who are active at the time 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 TSP list
- SPL History – Displays the finalized snap shot of the TSP list from which the sample was drawn for a particular quarter. This is a 'real time' report and should not be used to determine the exact snapshot of TSPs who existed at the time of sample generation

- LEA Coordinator Compliance Report – Displays the completion status for all the moments and corresponding TSP in a quarter. LEA SMAA 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 TSPs who are inactive at the time of running the report
- Quarterly Participant Snapshot – Display's the TSP's that held positions by job span dates for the selected quarter
- LEA Coordinator Follow-Up Report – This report provided information surrounding the clarifying question process for lEA coordinators and included items such as follow-up submission dates, expiration dates, and time/date of response if applicable

Moments

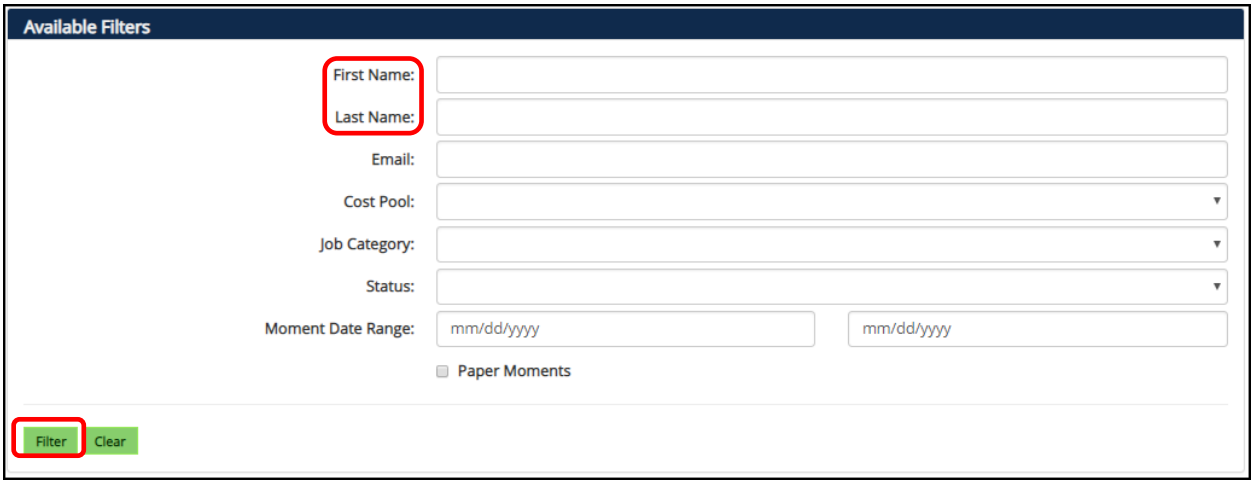
All sampled moments that have already occurred and upcoming moments that are within five (5) student attendance days of the sampled moment can be found by selecting the 'Moments' dropdown option from the home screen.

The submit column displays the date the RMTS form was submitted or completed by the TSP.



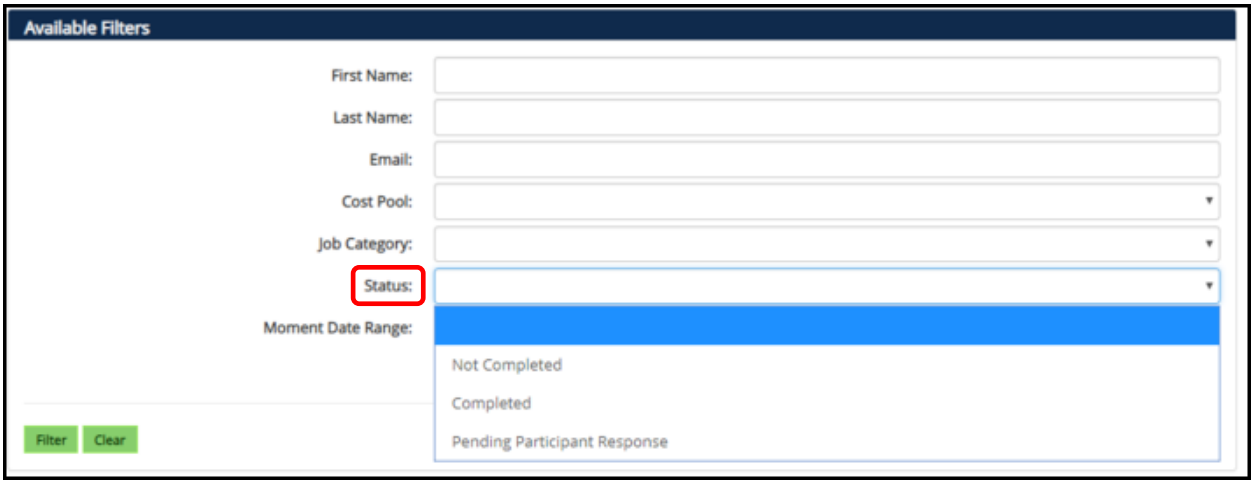
Moments can be displayed by the following views:

View by Participant - To view the sampled moments by TSP, enter the TSP's **First Name** and **Last Name**, and click **'Filter'**.



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.

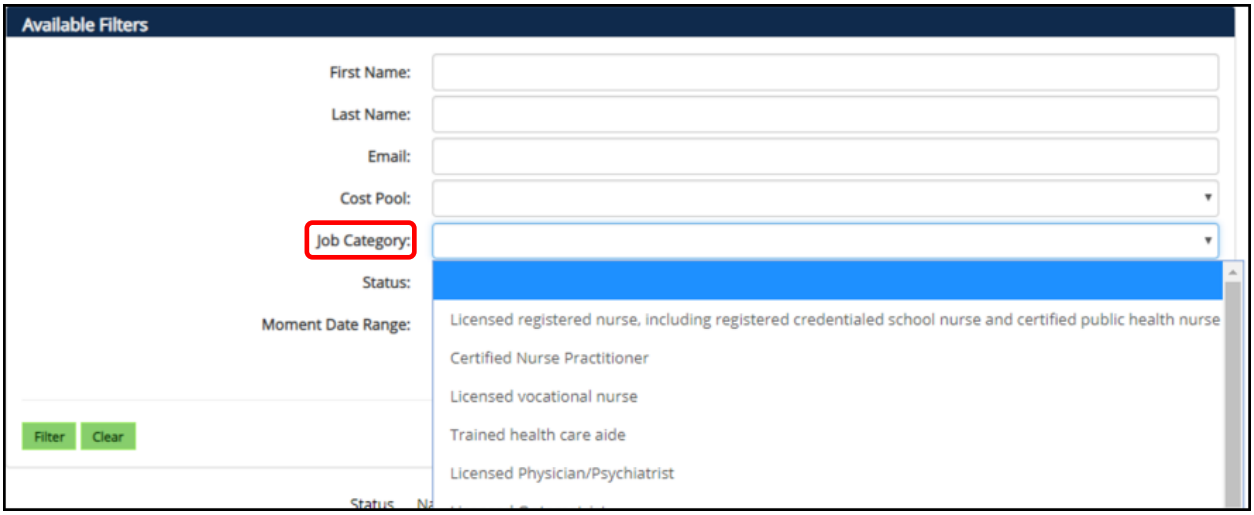
- **Not Completed** - This view displays all moments that have not been submitted / completed
- **Completed** - This view displays all moments that have been submitted / completed
- **Pending Participant Response** - This view displays all moments that have not been responded to. As a coordinator, you will use this to monitor staff's participation to ensure that the sampled moments are completed timely



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

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 TSP list.

Click on the dropdown arrow and select desired job category for display and click 'Filter'.



Participant Screens

Email Notifications

TSP will receive the following email notifications regarding his/her RMTS form:

1. Moment reminder – 5 student attendance days before the moment
2. Moment reminder – 1 hour before the moment
3. Late notice – 24 hours after the moment
4. Late notice – 3 days after the moment

The emails will come from calec@pcgus.com. The sampled TSP will receive the first email notification **<u>five (5) student attendance days</u>** prior to his/her selected moment in time.

The email notification will provide the TSP with a link to access the on-ine RMTS form. The hyperlink to respond to the moment will be included in the first two (2) email notifications.

The TSP will receive two late notice emails if the RMTS form is not completed on the day of the sampled moment in time. The LEA coordinator will be copied on the late notice emails that are sent to the TSP. However, the TSP's link to respond will not be included in the late notification emails.

If the TSP has deleted or lost his/her emails that contains the access link to respond to the moment, the TSP must contact their LEA SMAA coordinator.

Please keep in mind, that the TSP has **five (5) student attendance days** to complete their on-line RMTS form.

Participant Login

To log in, the TSP will click the hyperlink located within the body of the email notification.

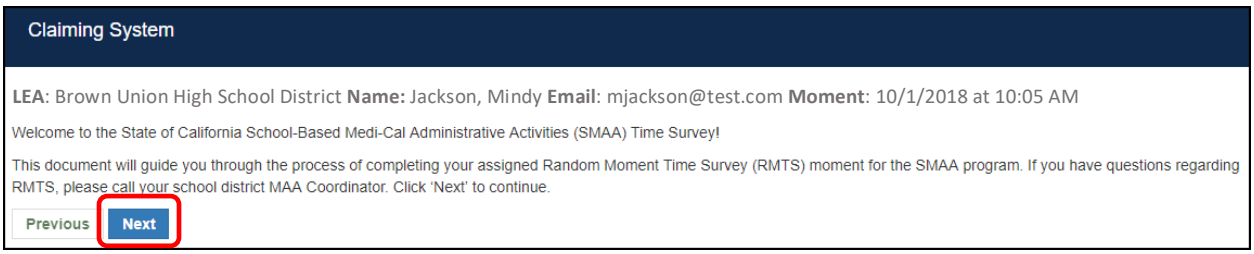
The hyperlink **will** be included in the moment reminder email that is sent to the TSP five student attendance days before the moment, and within notification email sent at the time of the moment.

Program Overview and Online Training Material

The following screens provide the TSP 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 TSP will click '**Next'** to advance through the screens.

***Welcome to the State of California Time Study!**

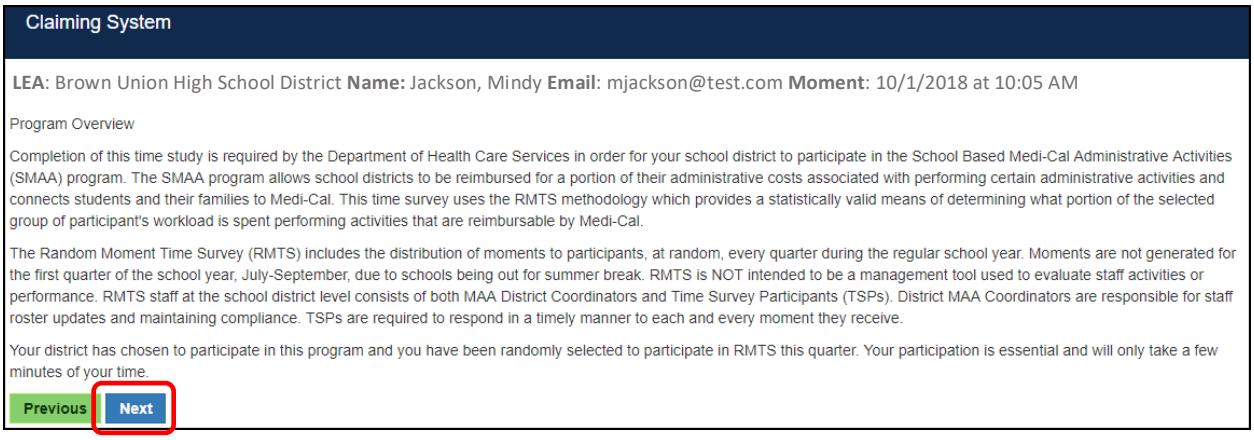

Claiming System

LEA: Brown Union High School District **Name:** Jackson, Mindy **Email**: mjackson@test.com **Moment**: 10/1/2018 at 10:05 AM

Welcome to the State of California School-Based Medi-Cal Administrative Activities (SMAA) Time Survey!

This document will guide you through the process of completing your assigned Random Moment Time Survey (RMTS) moment for the SMAA program. If you have questions regarding RMTS, please call your school district MAA Coordinator. Click 'Next' to continue.

Previous Next


Claiming System

LEA: Brown Union High School District **Name:** Jackson, Mindy **Email**: mjackson@test.com **Moment**: 10/1/2018 at 10:05 AM

Program Overview

Completion of this time study is required by the Department of Health Care Services in order for your school district to participate in the School Based Medi-Cal Administrative Activities (SMAA) program. The SMAA program allows school districts to be reimbursed for a portion of their administrative costs associated with performing certain administrative activities and connects students and their families to Medi-Cal. This time survey uses the RMTS methodology 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 Medi-Cal.

The Random Moment Time Survey (RMTS) includes the distribution of moments to participants, at random, every quarter during the regular school year. Moments are not generated for the first quarter of the school year, July-September, due to schools being out for summer break. RMTS is NOT intended to be a management tool used to evaluate staff activities or performance. RMTS staff at the school district level consists of both MAA District Coordinators and Time Survey Participants (TSPs). District MAA Coordinators are responsible for staff roster updates and maintaining compliance. TSPs are required to respond in a timely manner to each and every moment they receive.

Your district has chosen to participate in this program and you have been randomly selected to participate in RMTS this quarter. Your participation is essential and will only take a few minutes of your time.

Previous Next

LEA: Brown Union High School District **Name:** Jackson, Mindy **Email**: mjackson@test.com **Moment**: 10/1/2018 at 10:05 AM

Claiming System

LEA: Warner Unified School District; **Name:** Osuna, Chermaine; **Email:** test824@test.com; **Moment:** 6/14/2018 at 11:15 AM

What is the Random Moment Time Study?

-Random Moment Sampling is a time survey methodology for accurately assessing the time spent on administrative activities.

-Time studies are conducted on a quarterly basis in order for school districts to be able to participate in the SMAA program.

-Time Study Participants (TSPs) are randomly selected and randomly assigned a moment(s) in time to create time study sample moments. A moment is the one/single minute assigned.

- All moments will be received via e-mail. A direct link to the secure RMTS website will be provided in the e-mail.
- A TSP will receive an e-mail notification 5 calendar days prior to their moment and another email 1 hour prior to their moment. Do not delete time study notification emails until the moment has been completed. Emails associated with the RMTS will always come from CALGA@pcgus.com and you should add this email address to your safe sender list so it is not moved to your "spam" or "junk" folders.
- After your moment has arrived, you will log into a secure website using the link provided in the e-mail.

-TSPs must complete their RMTS form on or after their time study sample moment. The sample moment will expire after 5 student attendance days and TSPs will no longer have an opportunity to complete this moment. Electronic forms are submitted directly to Public Consulting Group (PCG) through the completion of the electronic RMTS form.

- TSPs must accurately report what they are doing during their assigned moment.
- All data transferred and collected is secure and confidential. You will only have 5 student attendance days to complete your response in order for it to be considered valid. You will receive follow-up e-mails 24 hours and 72 hours after the moment if you have not yet completed your moment.

-All sampled moments must be completed to obtain a statistically valid sample.

Previous Next

Claiming System

LEA: Brown Union High School District **Name:** Jackson, Mindy **Email**: mjackson@test.com **Moment**: 10/1/2018 at 10:05 AM

Completing the Electronic RMTS Form

As soon as your sampled moment in time has occurred, complete your RMTS moment by clicking on the link provided in the moment notification email. You will first be asked to verify whether or not you were working during your RMTS moment.

Were you working during your sample moment? (Select appropriate radio button when prompted)

- Yes, I was working
- No, Moment was during paid time off
- No, Moment was during an unpaid time off
- No, Moment was before/after workday (This does not include lunch)

Note: If your moment occurs during lunch, notate whether that lunch was paid time off or unpaid time off.

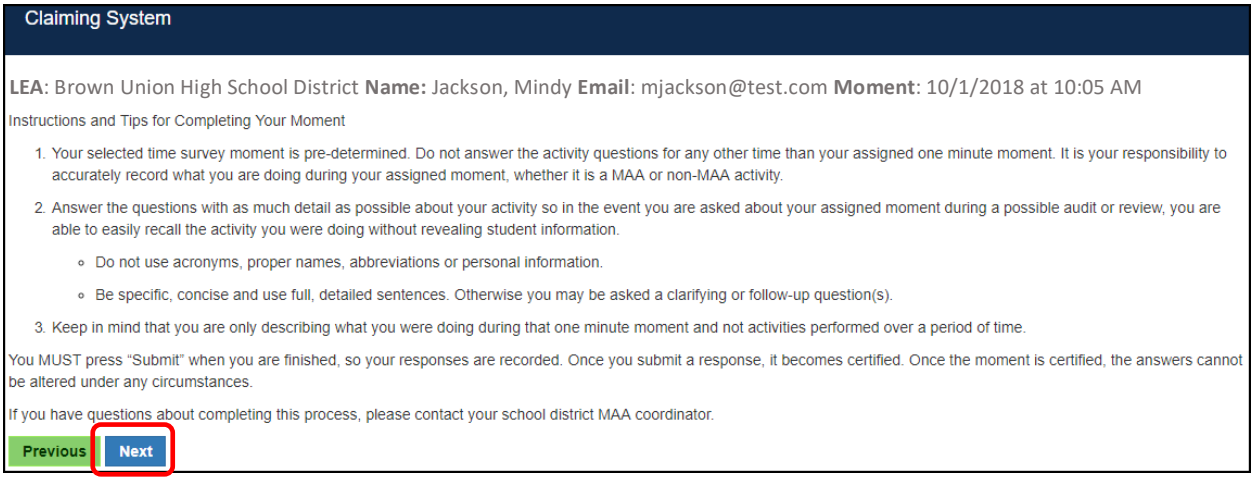
Next, you will be prompted to document the activity you were performing at the specific time of your selected one minute moment by answering three questions:

1) Who were you with?

2) What were you doing?

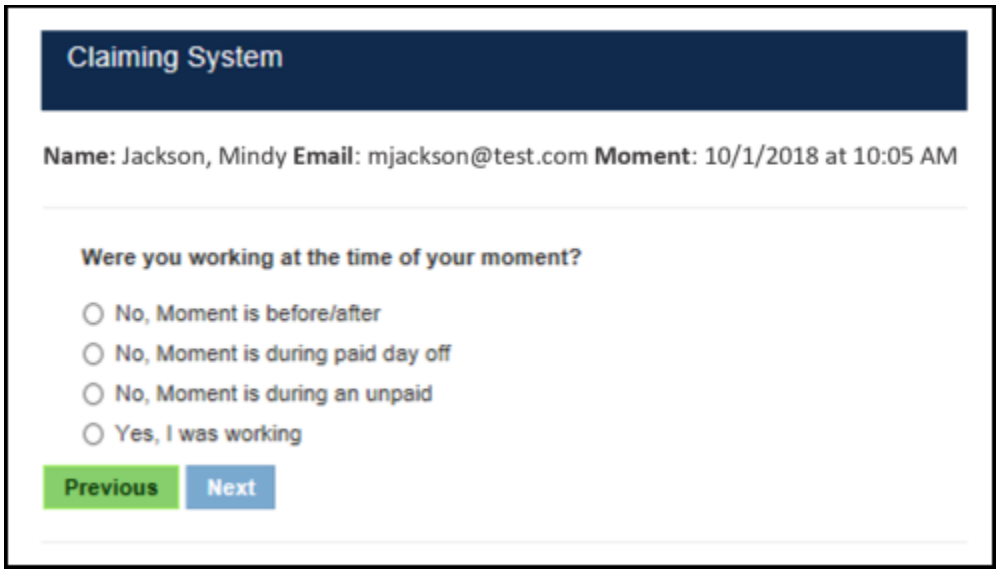
3) Why were you performing the activity?

Previous Next



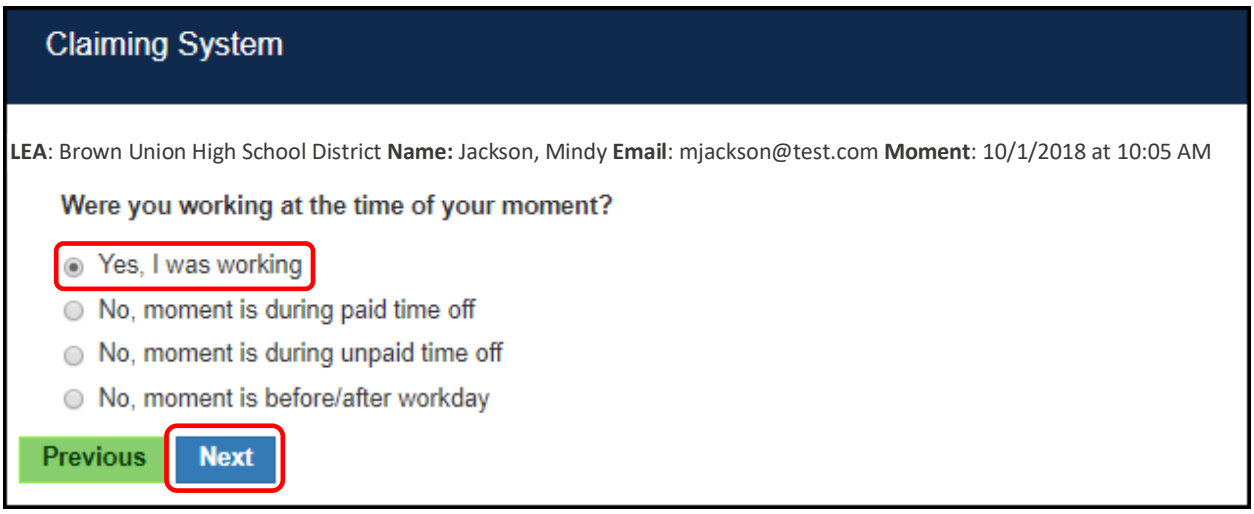
After the TSP has completed reading the training material and instructions, the TSP will click '**Next**' to access the RMTS form.

RMTS Form



Moment During Working Day

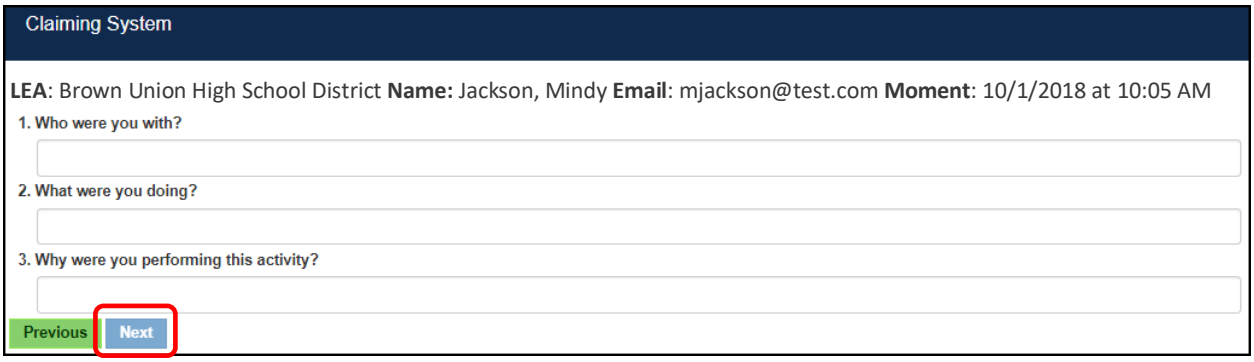
By selecting the 'Yes, I was working' it will illuminate the 'Next' option. Select 'Next'



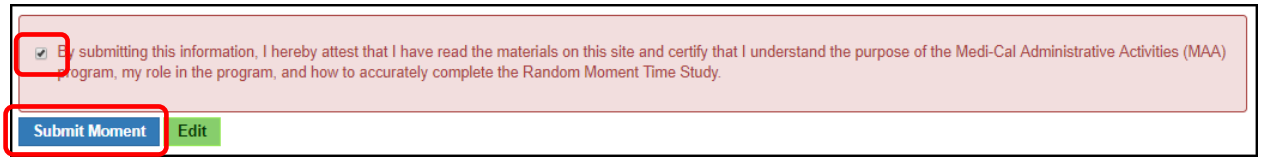
The TSP must answer all of the questions, documenting the activity that was being performed at his/her sampled moment in time. **ALL three (3) questions** must be answered to complete the form

1. Who were you with?
2. What were you doing?
3. Why were you performing this activity?

4. Select 'Next'



1. Check the box that states, '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 Medi-Cal Administrative Activities (MAA) program, my role in the program, and how to accurately complete the Random Moment Time Study.' and either select 'Edit' to review the moment or select 'Submit Moment' to complete the moment and receive confirmation.

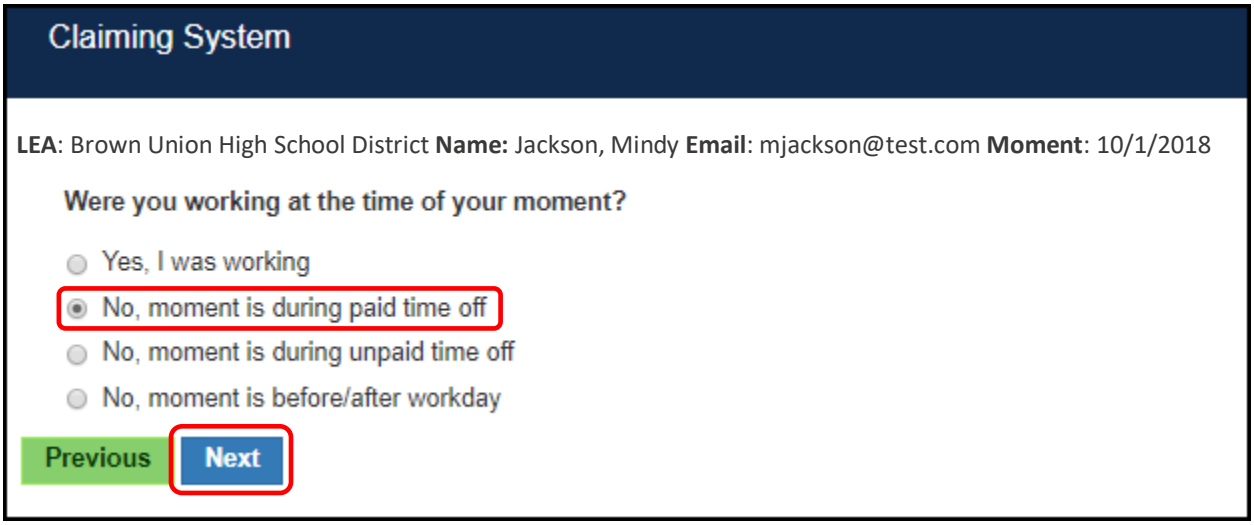


See below the confirmation that indicates the moment has been submitted successfully:

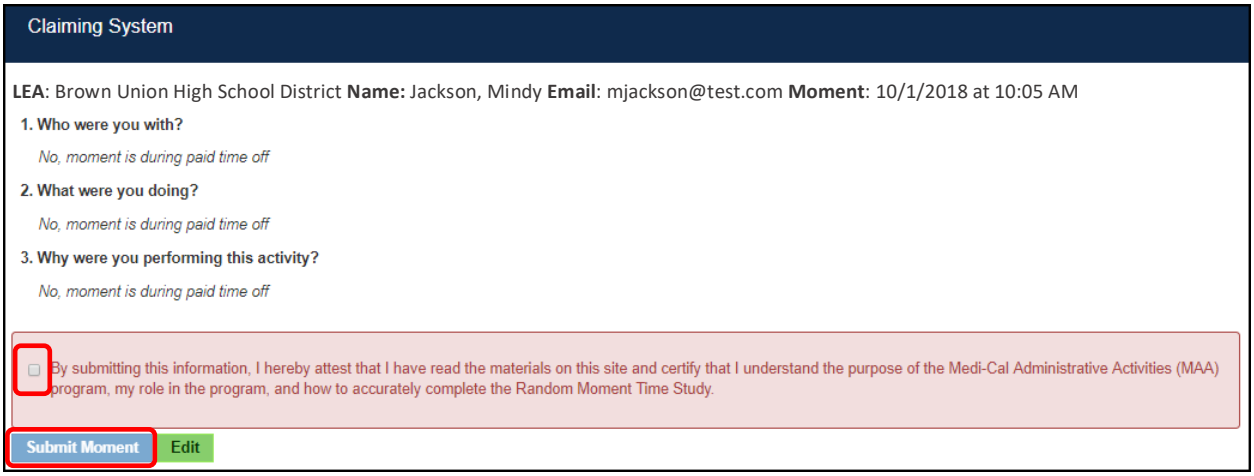
Completing the RMTS Form

During Non-Working Day

Select the appropriate non-working response according to pay status (i.e., either 'No moment is during paid time off' or 'No, moment is during unpaid time off'). Click 'Next' to view the completed form.



To complete the form, the TSP must click the check box. This will serve as the TSP's electronic signature. The 'Submit Moment' button will appear after the TSP clicks the check box.

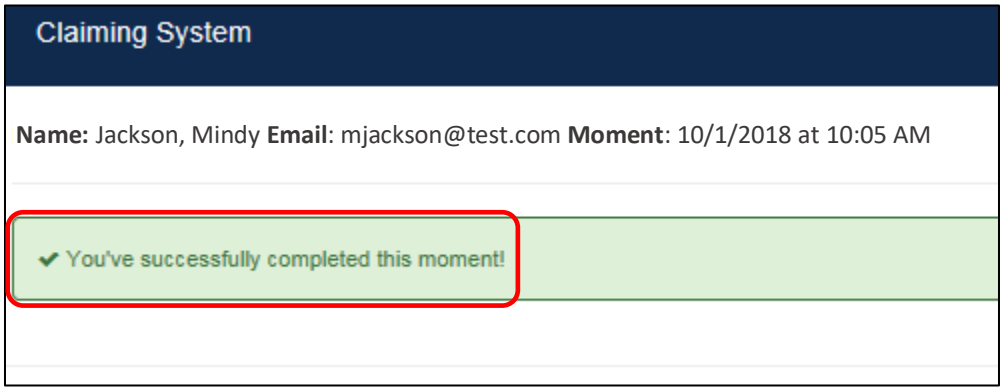


When the TSP selects that he/she was not working during their sampled moment in time, the form will automatically populate with the reason that TSP selected for not working.

To make changes, the TSP can click the '**Edit**' button and return to the previous screen to make any necessary changes.

To complete the RMTS form the TSP **must** complete the check box at the bottom of the form. By checking this box, the TSP is stating that he/she has accurately completed the random moment time survey.

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



**Responses in the previous 2 system screen shots are for example only and should not be used by TSPs to complete their sampled moment.*

Request for Follow Up

The TSP will be notified via email if additional information is needed to accurately code the completed sample moment. When the TSP's response does not provide enough information to accurately code the moment, a request for follow up via email will be sent.

The follow-up email will come from calec@pcgus.com. The TSP can receive up to two (2) email requests for follow up. The TSP is provided reminders for 3 days between notifications to log into the PCG Claiming System and provide the additional information that is being requested. If the TSP fails to provide the additional information after two requests, the SMAA coordinator is copied on the third and final email request. However, the TSP's hyperlink will not be provided in the third request that includes the SMAA coordinator.

If the TSP has deleted or lost his/her emails that contain the hyperlink to access their moment, the TSP must contact their LEA SMAA coordinator.

To access the RMTS form to provide additional information, the TSP will log into the PCG Claiming System using the link provided in the above referenced emails.

The TSP must complete the on-line training screens, clicking **'Next'** to progress through the screens. The PCG Claiming System does not allow the original response to be altered. The TSP will provide the information requested by PCG and then click '**Save'** to complete the form.

Hard Copy Moments

TSPs that do not have an email address that are selected for a moment must be administered a paper or hard copy moment according to the hard copy moment process outlined by DHCS. By selecting the 'Moments'

dropdown option from the homepage and then selecting the 'All' from the dropdown options the LEC coordinator can see a list of all moments selected for the quarter. A printer icon indicates that a hard copy moment must be printed and distributed to the TSP by the LEA SMAA or LEC coordinator.
LEA SMAA coordinators must not notify a TSP of their selected moment in time no more than five (5) student attendance days before the sampled moment.

TSPs receiving hard copy moments must complete the same training and answer the same questions as outlined above (except on paper) and they will have **three (3) student attendance days** to turn in their hard copy moment to the LEA SMAA coordinator.

Frequently Asked Questions

What if a TSP does not have a work email address?
If a TSP does not have a work email address, they can provide a personal email address. All TSPs should have their own unique email address that is not shared. If a TSP does not have a unique email address entered with the PCG Claiming System, hard copy moments will be created during the claim generation for the TSP.

What if a selected TSP quits prior to the sampled moment in time?
If there is a replacement, the replacement's name and email address should be entered within the PCG Claiming System. Please reference section the LEA SMAA Coordinator Guide for detailed instructions on how to replace a TSP within the system. If there is not a direct replacement for the TSP that the moment is assigned to, enter the TSP's end date and the moment will be assigned to a vacant position.

What if a selected TSP is on leave during the sampled moment in time?
The LEA coordinator will notify his/her LEC coordinator prior to the sampled moment that the TSP is on leave, the start and end date of the leave, the type of leave, and if the leave is paid or unpaid. Please reference the section with this guide 'Completing Moments on Behalf of TSPs' for detailed instructions on how to complete a moment on behalf of the TSPs on leave during their sampled moment day/time.

How do we know if someone has completed their RMTS form?
By reviewing the moments list, the SMAA coordinators can see who has not completed their on-line RMTS form. The SMAA coordinator will also be copied on the **24 Hour Late Notice** and the **3 Day Late Notice** email notifications sent to the TSPs when they have not completed their on-line RMTS form.

How will the TSPs know when they have been assigned a moment?
The email notifications will come from **calec@pcgus.com** that contain all moment information as well as a link to complete their moment. TSPs should not respond to the RMTS email notifications and should direct all questions to their SMAA coordinator.

What if the TSP deletes their email notifications with the link to access their moment?
The TSP must contact their LEA SMAA coordinator. The link to access moments <u>will not</u> be provided to the SMAA coordinator but can be accessed by the LEC coordinator using the Master Sample File or can resend the link using the 'Notifications' resend link option. The TSP has five (5) student attendance days from the sampled moment in time to complete the on-line RMTS form.

Can participant data be updated in the PCG Claiming System during the quarter?
Updating TSP data such as correcting the spelling of a name, updating an email address, or entering a termination date can be completed at any time during the quarter. Any changes in status or the addition of new positions cannot be made until updates are allowed for the next quarter.

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