

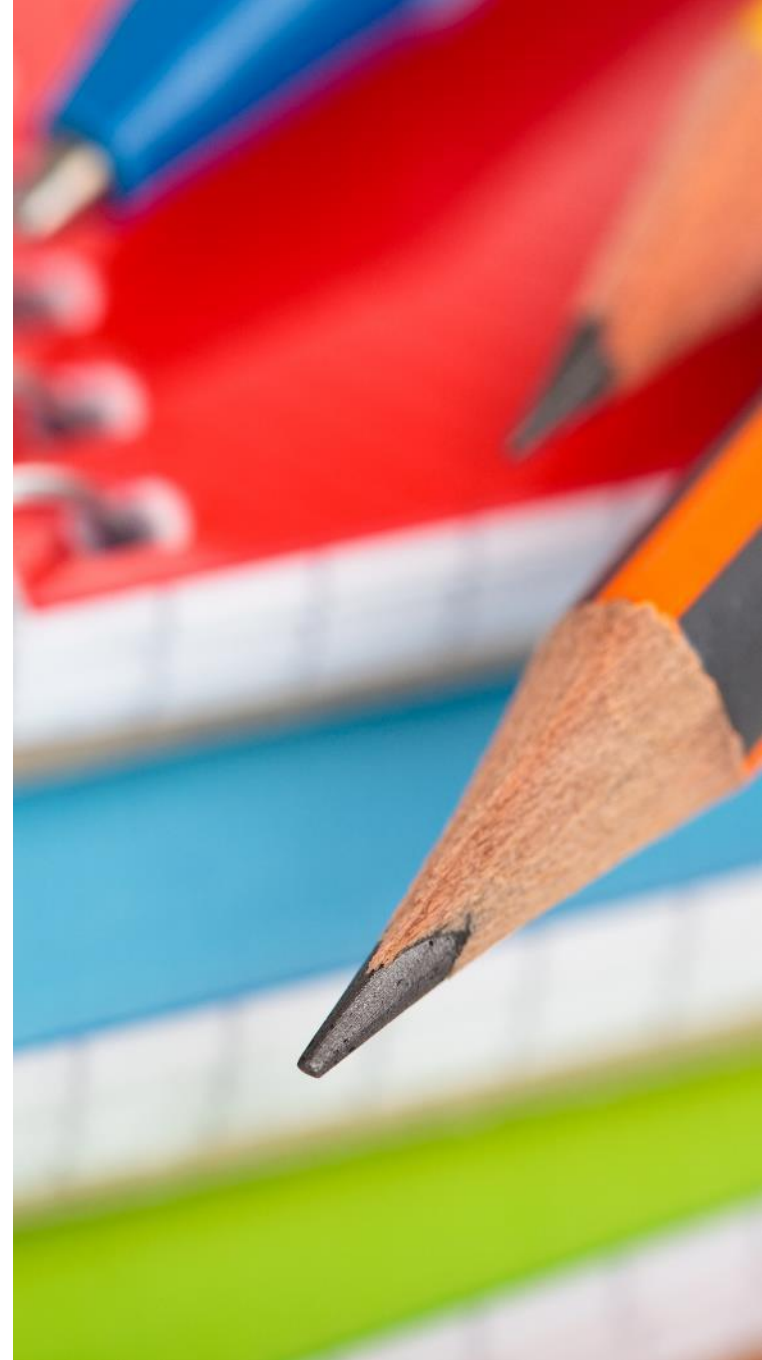


School-based Medi-Cal Administrative Activities (SMAA) Program

Random Moment Time Survey (RMTS)
Quarterly Refresher Training

Agenda

- Quarterly Updates
- Calendars
- Shifts
- TSP Updates
- Sample Generation
- System Reminders



RMTS –Quarterly Updates

RMTS Quarterly Updates

Each quarter the following will be updated unless otherwise directed by your LEC coordinator:

- Calendars
- Shifts
- TSP list

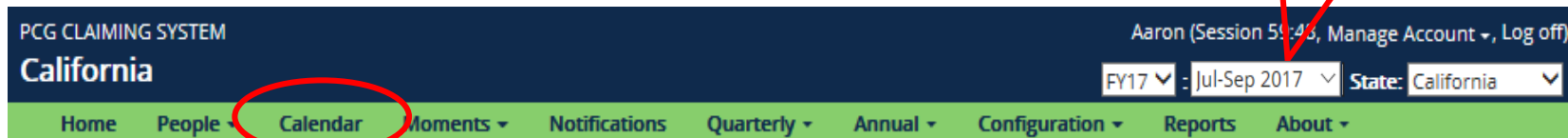
Work with your Business Office and Human Resource department to identify TSPs who:

- **Are NOT 100% federally funded (eliminate from TSP list if they are)**
- Currently employed with the LEA
- Meet SMAA participant time survey requirements as outlined in the DHCS SMAA guide

Calendar Updates

Calendars

Reminder: Enter the full school year calendar within the JS quarter



Calendar Certification

- Each LEA MAA coordinator must enter the LEA school year calendar indicating all non-student attendance days
 - LEC coordinators certify all Federal holidays before the LEA calendar is available
 - LEA MAA coordinators must indicate all additional non-student attendance days for the entire school year displayed within the JS quarter's calendar
 - Be sure to indicate all non-student attendance days by marking the days as holiday/non-work day in the system (red)
- Each quarter calendar must be certified prior to sample generation
 - Verify existing non-student attendance days selected for the upcoming quarter that were previously entered and make revisions as necessary
- Calendars must be approved by LEC coordinators

Calendars

- Access calendars by clicking on the ‘Calendar’ link from the home screen
- Add holidays/non-working days for the entire school year by clicking on the appropriate label (‘Holiday/ Non-Work day’) and then clicking on each date to label appropriately
- Certify calendar by clicking the ‘Save Changes’ then ‘Certify’
 - Each quarter, review the certified calendar and make changes if necessary to future dates
 - ‘Save Changes’ if applicable and ‘Certify’

PCG CLAIMING SYSTEM
 California
 Anita (Session 43:13, Unimpersonate, Manage Account -, Log off)
 FY17 Jul-Sep 2017 District: California LEA

Home People **Calendar** Moments Configuration Reports About

Calendar: California LEA
 Save Changes **Certify Calendar** Export Days Off Ready for certification

Additional Information:
 • The calendar is ready to be certified. Please make sure all holidays for the quarter have been indicated, saved, and certified.

Calendar Options: Show Certified Calendar? Show Alternate Label?
Alternate Labels: Show Moment Dates? Show Moment Overdue Dates? Show Moment Notice Dates? Show Follow-up Overdue Dates?

Holiday/Non-Work Day

August 2016
 Sun Mon Tue Wed Thu Fri Sat
 1 2 3 4 5 6
 7 8 9 10 11 12 13
 14 15 16 17 18 19 20
 21 22 23 24 25 26 27
 28 29 30 31

September 2016
 Sun Mon Tue Wed Thu Fri Sat
 1 2 3
 4 5 6 7 8 9 10
 11 12 13 14 15 16 17
 18 19 20 21 22 23 24
 25 26 27 28 29 30

October 2016
 Sun Mon Tue Wed Thu Fri Sat
 1
 2 3 4 5 6 7 8
 9 10 11 12 13 14 15
 16 17 18 19 20 21 22
 23 24 25 26 27 28 29
 30 31

November 2016
 Sun Mon Tue Wed Thu Fri Sat
 1 2 3 4 5
 6 7 8 9 10 11 12
 13 14 15 16 17 18 19
 20 21 22 23 24 25 26
 27 28 29 30

December 2016
 Sun Mon Tue Wed Thu Fri Sat
 1 2 3
 4 5 6 7 8 9 10
 11 12 13 14 15 16 17
 18 19 20 21 22 23 24
 25 26 27 28 29 30 31

January 2017
 Sun Mon Tue Wed Thu Fri Sat
 1 2 3 4 5 6 7
 8 9 10 11 12 13 14
 15 16 17 18 19 20 21
 22 23 24 25 26 27 28
 29 30 31

February 2017
 Sun Mon Tue Wed Thu Fri Sat
 1 2 3 4
 5 6 7 8 9 10 11
 12 13 14 15 16 17 18

March 2017
 Sun Mon Tue Wed Thu Fri Sat
 1 2 3 4
 5 6 7 8 9 10 11
 12 13 14 15 16 17 18

April 2017
 Sun Mon Tue Wed Thu Fri Sat
 1
 2 3 4 5 6 7 8
 9 10 11 12 13 14 15

Shift Updates

Shift Updates

PCG CLAIMING SYSTEM Anita (Session 52:42, Unimpersonate, Manage Account ▾, Log off)

California FY17 ▾ : Oct-Dec 2017 ▾ District: California LEA ▾

Home People ▾ Calendar Moments Configuration ▾ Reports About ▾

Shifts

Add New Shift

Id	Shift	Hours	Agency
45	M-W 6:30 AM - 3:30 PM	27 hours 0 minutes	California LEA
47	MW 7:30-3:30	16 hours 0 minutes	California LEA
46	MWF 6:30-3:30	27 hours 0 minutes	California LEA

- Shifts previously established will transfer from the previous quarter
 - Review Shifts
 - Shifts can be added, edited, or inactivated for the prospective quarter
 - Verify that no TSPs are assigned to a shift before inactivating
- LEA MAA coordinator will select the most appropriate shift for each employee
- Shifts must be completed prior to updating TSP data or adding new TSPs to the staff pool list

Adding or Editing Shifts

- Access shifts by clicking on the 'Configurations' link from the home screen
- To add new shifts for TSPs enter:
 - Desired name of shifts
 - Day(s) of the week
 - Begin time associated with each day
 - Duration for each day in hours and minutes (6h 30m)
 - Position indicates the order in which shifts will display in the TSP shift type drop down menu
- To edit Shifts for TSPs edit any desired field or delete rows
- To inactivate entire shift select 'Inactive' box
 - Please make sure to NOT inactivate shifts that are currently assigned to TSPs

Edit Shift

Shift:

Position:

Inactive

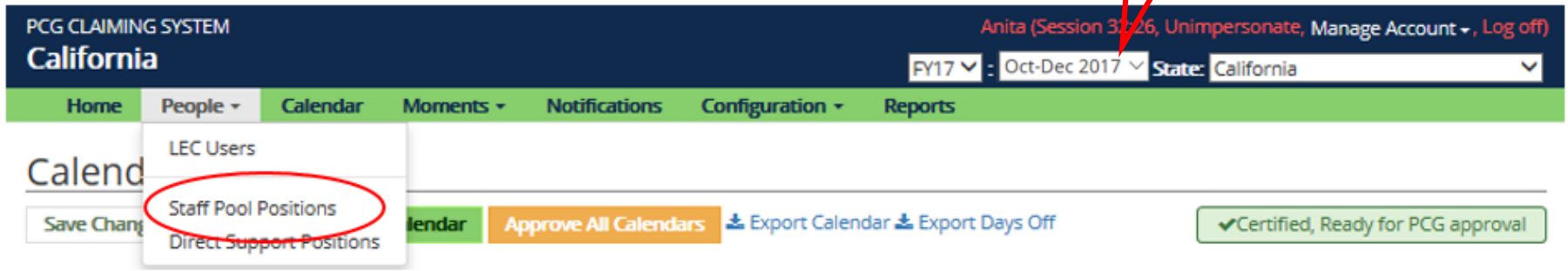
Day of week	Begin Time	Duration	Delete
<input type="text" value="Monday"/>	<input type="text" value="6:30 AM"/>	<input type="text" value="9h"/>	<input type="text" value="✘"/>
<input type="text" value="Wednesd"/>	<input type="text" value="6:30 AM"/>	<input type="text" value="9h"/>	<input type="text" value="✘"/>
<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

(No changes on page)

Updating TSP Lists

TSP List Updates

Reminder: Change to the appropriate quarter



- All changes such as adding a new job position, updating existing TSP information, and inactivating/activating TSP must be made directly in the system from the **‘Staff Pool Positions’** link located under the ‘People’ menu from the home screen
 - Changes can be made up until TSP list has been certified
 - If changes need to be made in the system **AFTER** it has been certified the LEA will need to contact their LEC coordinator to unlock the previously certified list
 - The TSP list cannot be unlocked or updated after the sample has been generated and moments have been assigned
 - Positions added to TSP lists are effective with the upcoming quarter and does not change data for the current quarter
 - Name changes, replacements, terminations, and emails addresses update immediately
- TSP list must be certified after all updates are completed in the system

Adding a new TSP

- Access the TSP list from the ‘People’ tab on the home screen then select ‘Staff Pool Positions’
- Add a new participant:
 - Manually by clicking on ‘Add New Job Position’ and completing the required information
 - Mandatory fields are highlighted in ‘red’
 - Employee ID is not a required field but is required for the SMAA program
 - All newly added TSP positions for October-December must have a start date of 10/01/17

The screenshot displays the 'PCG CLAIMING SYSTEM' interface for 'California'. The top navigation bar includes 'Home', 'People', 'Calendar', 'Moments', 'Notifications', 'Configuration', and 'Reports'. The main heading is 'Staff at District: California LEA'. Below this, there are three buttons: 'Add New Job Position' (circled in red), 'Certify Staff Pool', and 'Approve All Staff Pools', along with 'Export' and 'Import' icons. An 'Available Filters' section is visible below the buttons. The main form area contains several fields: 'Location' (California LEA), 'Cost Pool' (Required), 'Job Category' (Required), 'Shift Type' (Required), 'Job Title', 'Description', and 'Action' (Fill With New). Below these is a 'Create new staff:' section with fields for 'Start Date' (10/01/2016), 'End Date' (mm/dd/yyyy), 'Employment Type' (Required), 'Email' (Required), 'Employee ID' (with a 'No Email' checkbox), 'First Name' (Required), 'Middle Name', 'Last Name' (Required), 'Suffix', 'Phone', and 'Email CC Person'. At the bottom, there is an 'Add Another?' checkbox and two buttons: 'Cancel' and 'Create New Job Position'.

Editing TSP Information

- Access the TSP list from the 'People' tab from the home screen then select 'Staff Pool Positions' and click on the TSP's name
- To make edits to an existing TSP click on the TSP's name, make applicable changes, and click 'Save Changes'
- Last names and/or email addresses can be updated by selecting the check box and then making the appropriate changes
- To remove a position from future RMTS participation, place an end date of the last day of the previous quarter (ex: 09/30/17 for OD17) and then delete the vacancy that is created in the following quarter

Edit Job Position 8 / 27

Location: California LEA

Cost Pool: Administrative Service Providers Only

Job Category: Secretary, Sr. Secretary

Shift Type: TeacherElementarySchool 9-2

Job Title: Sped Secretary

Description:

Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll		lucy@caelementaryschool.com	Lucy, Laney	10/01/2014		x

Action: Edit

Edit staff:

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 above.

Employment Type: District Payroll

Start Date: 10/01/2014

End Date: mm/dd/yyyy

Email: lucy@caelementaryschool.com

No Email

Employee ID:

First Name: Laney

Middle Name:

Last Name: Lucy

Suffix:

Phone:

Email CC Person:

< > Edit Another?

Cancel Save Changes
(No changes on page)

Editing TSP Information

- To delete a vacancy, choose 'Delete' from the action drop down, confirm the deletion, and 'Save Changes'
- A vacant position can be filled by a TSP who has previously participated in RMTS by selecting the 'Fill With Existing' option from the 'Action' dropdown
 - Coordinator will search by email address, last name, or first name to locate the TSP filling the position
 - TSP filling the position CAN NOT be an active TSP for the LEA
- A vacant position can be filled with a new participant by selecting the 'Replace with New' option from the 'Action' drop down
 - All required fields would then need to be completed
- Certify the TSP list by clicking on the 'Certify Staff Pool' option
- TSP lists must be approved by LEC coordinator prior to claim sample generation

The screenshot displays a web application interface for managing TSPs. At the top, there is a 'Description:' field. Below it is a table with columns: 't Status', 'Employee ID', 'Email', 'Name', 'Start Date', 'End Date', and 'Delete'. A row is visible with Employee ID 1768, Email cynthia_acaba@fullertonsd.org, Name Acaba, Cynthia, and Start Date 01/01/2015. An 'Action:' dropdown menu is open over this row, showing options: 'Vacate', 'Replace With Existing', 'Replace With New', and 'Edit' (which is highlighted). Below the table is a form for editing the selected TSP. It includes a checkbox for '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 above.' The form fields are: 'Employment Type' (District Payroll), 'Start Date' (01/01/2015), 'End Date' (mm/dd/yyyy), 'Email' (cynthia_acaba@fullertonsd.org), 'Employee ID' (1768), 'First Name' (Cynthia), 'Middle Name' (empty), 'Last Name' (Acaba), 'Suffix' (empty), 'Phone' (714/447-7500), and 'Email CC Person' (empty). At the bottom right, there are 'Cancel' and 'Save Changes' buttons, with a note '(No changes on page)' below them.

Using the Import / Export Feature

- Select the 'Export' option from the 'People' tab from the home screen

The screenshot shows the top navigation bar of the PCG CLAIMING SYSTEM. The user is logged in as 'Jeri (Session 58:11, Unimpersonate, Manage Account, Log off)'. The system is set to 'California'. The navigation menu includes 'Home', 'People', 'Calendar', 'Moments', 'Configuration', and 'Reports'. Below the navigation bar, the page title is 'Staff at District: California LEA'. There are three main buttons: 'Add New Job Position', 'Certify Staff Pool', and 'Export' (circled in red). There is also an 'Import' button and a 'Ready for certification' status indicator.

- Save the file as an Excel file named 'spllexport'
- Retain the worksheet (tab) naming convention of 'spllexport' as well
- **DO NOT** rearrange, insert/delete, or rename columns
- The export file contains the following fields:
 - **CostPool.Name** – name of the cost pool
 - **Agency.Name** – full LEA name
 - **ParentAgencyName** – region or agency that the Local Education Agency (LEA) participates under
 - **JobSpanID** – a system generated number that is included in the export for existing Time Study Participants (TSPs) that should be left blank for new and should not be edited for existing TSPs
 - **JobPositionID** – a 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
 - **JobCategory.Name** – one of the approved job categories
 - **JobTitle** – the TSP's official district job title
 - **Description** – not a required field but can be used for any purpose

Using the Import / Export Feature

- **ShiftType.Name** - name of the shift established in the system that is appropriate for the TSP
- **LastName** – last name of TSP
- **FirstName** – first name of TSP
- **MiddleName** – middle name of TSP (if applicable)
- **Email** - the participant's unique email address. If the participant does not have an email address, then Employee ID is required
- **EmployeeId** - not a required field (unless no email address is available) but may include LEA created employee ID. DO NOT use Social Security numbers
- **EmploymentStatus** - either 'District Payroll' or 'Contracted'
- **NewPerson** – must be populated with a 'Y' or 'Yes' if the row is adding a new TSP
- **UpdateLastNameorEmail** – must be populated with a 'Y' or 'Yes' if the row contains changes to the TSP last name or email address
- **DeleteJobSpan** – may be populated 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
- **BeginDate** - 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 – this is for new TSPs during quarterly updates)
- **EndDate** – 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. For OD17, this would be 09/30/2017
- **Inactivate** – enter a 'Y' if you are removing a TSP from your TSP list

Using the Import / Export Feature

- All new positions must be added to the bottom of the file
- **DO NOT** delete rows – to delete a TSP please use the ‘EndDate’ and ‘Inactivate’ columns
 - Vacancy will be created if ‘Y’ is not indicated in the ‘Inactivate’ column
- Import the file by selecting ‘Import’ from the ‘People’ option from the home screen

PCG CLAIMING SYSTEM Jeri (Session 58:11, Unimpersonate, Manage Account, Log off)

California FY18 : Oct-Dec 2017 District: California LEA

Home People Calendar Moments Configuration Reports

Staff at District: California LEA

Add New Job Position Certify Staff Pool Export **Import** ✓ Ready for certification

Available Filters

Sample Generation

Sample Generation

- Once all quarterly updates have been completed by the LEA, the LEC coordinator will need to approve the calendars and TSP lists
- PCG will then provide additional QA and will follow-up with LEC coordinators for clarification or required revisions
- After all QA is finished the quarterly sample will be generated and TSPs will be notified 5 student attendance prior to their first moment
- Once the new quarterly sample has been generated, updates to TSPs email addresses and last names, or terminations and replacements are the only changes that will be effective during the quarter



RMTS – System Reminders

Best Practices

- **All changes** should be made in the quarter in which they occur
 - If a TSP is terminated in the current, active quarter place the actual TSP end in the system creating a vacancy
 - Replacement information is effective immediately and actual start dates should be entered during current, active quarters so that assigned moments can be assumed
- A position can be vacated by selecting the '**Vacate**' option from the '**Action**' drop down menu
 - Appropriate end date will be required
 - Vacant positions must be resolved prior to certification (filled or deleted)

RMTS System Reminders

TSPs document their activity during assigned moment(s) in the web-based RMTS system

TSPs receive the following notifications:

- 5 student attendance days before the moment
- 1 hour before the time of the moment
- 24 hours after the moment
- 3 student attendance days after the moment
- The LEA MAA coordinators are copied on the 24 hour and 3 day late notifications

Paper RMTS moments are generated for TSPs that do not have an available email address

- TSP must complete, certify, and submit their paper moment within 3 student attendance days of the moment to the LEA MAA coordinator unless otherwise directed by your LEC coordinator
- LEC coordinator must enter the responses within the 5 student attendance day response timeframe



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