Payroll Based Journal (PBJ) Checklist

☐ Identify a PBJ champion in your organization. This will be the individual that will complete all of the subsequent steps.

☐ Become familiar with the requirements of the Payroll Based Journal
  ☐ Read the latest version of the Payroll Based Journal Manual available here
  ☐ Read the PBJ Policy Manual FAQs, available here
  ☐ Read the PBJ Technical Specifications, available here

Help on many of the steps listed here can be found on the QTSO e-University

☐ Set up your PBJ user account
  ☐ Obtain a CMSNet User ID (https://www.qtso.com/cmsnet.html)
  ☐ Obtain a PBJ QIES Provider ID (https://www.qtso.com/accesspbj.html)

☐ Crosswalk your organization's staffing categories to the 35 mandatory Job Codes in Table 1 of the PBJ Policy Manual

☐ Add staff unique IDs and hire dates into PBJ

☐ Determine if you will submit data manually, via XML, or utilizing a combination of the two.
  ☐ Determine how you are going to track hours for contract employees (e.g. therapy, medical directors, etc.)
  ☐ Determine whether your time and attendance vendor has the capacity to support you with PBJ submissions
    ▪ If your time and attendance vendor does not have a solution for PBJ, determine whether or not you would like to explore an alternative vendor. If yes, start researching vendors who offer PBJ solutions. Check out this helpful list of vendors with PBJ solutions from AHCA

☐ Submit test data to PBJ

☐ Review the PBJ Final File Validation Report in CASPER

☐ Review the 1700D Employee Report, 1701D Census Report, and 1702S Staffing Summary reports in CASPER

☐ Identify and review any issues that you ran into during the first test submission and start gathering data for a second submission

Got questions?

- For policy questions, email NHstaffing@cms.hhs.gov
- For technical questions, email NursingHomePBJTechIssues@cms.hhs.gov.
- You can also email your questions to AHCA staff at staffdatacollection@ahca.org.