

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)