CMS PBJ Technical Information Call Minutes
Thursday, February 26, 2026
1:00 p.m. to 2:00 p.m. (ET)

Welcome.. Shawnna Haley, CMS

Welcome and thank you for joining the CMS Payroll Based Journal Technical Information Call. The purpose of this call is to provide information to PBJ software developers and vendors who are creating or have created software for Nursing Home providers. On this call, we will discuss the updates to the technical data submission specifications, QIES and PBJ system updates for April 1, 2026. We also plan to discuss the submitted Q&As and if time allows, we will have an open Q&A session.

A few quick reminders before we start, this meeting will be recorded for note taking purposes. If you are not speaking, please keep yourself muted. If you have a question, please feel free to post it utilizing the Q&A function. If you would like to ask your question live, please let us know utilizing the Q&A or Raise Hand function, so we can help you unmute.

Also please note that this is our first time hosting the PBJ Technical call as a webinar on Microsoft Teams, so we appreciate your patience as we navigate this tool transition.

PBJ 4.10.0 Data Specifications... John Jackson, GDIT

- We have new data specs with a new fileSpecVersion, 4.10.0, which will go into effect on March 22, 2026.
- There is a grace period between March 22 and March 31 at 1159pm EST for submissions with older fileSpecVersions. If submissions are received with older fileSpecVersions (2.00, 2.03 or 4.00), they will be accepted up until April 1st. Note that a warning message will be given for these submissions, indicating that these versions will NOT be accepted after March 31 at 1159pm EST.
- From April 1st on, only fileSpecVersion 4.10.0 will be accepted. Submissions with earlier fileSpecVersion values **WILL BE REJECTED**.
- What's new in this fileSpecVersion? Employee IDs will be checked to see if the number of staffing hours exceeds 22.5 hours in a single day. If so, the submission will be rejected. This edit (-4025) is enforcing guidance for employee staffing hours that has been in the Policy manual for some time.

- The XSD and Excel template files have been updated to enforce the 22.5-hour constraint. They are available on the same web page as the submission data specs.
- Hire and termination dates from 2026 to 2050 will no longer receive a warning from the XSD/Excel template.

QIES/PBJ System Updates .... Pat Meyer, GDIT

Key Dates to Remember:
March 20 – 21: The new fileSpecVersion, a.k.a., PBJ Data Specifications will be implemented in the PBJ system the weekend of March 21st. Please Note:
- Files submitted in version 4.10.0 before March 22 will result in the file being rejected.
- Daily 22.5-hour limit enforcement: Starting March 22nd, manual entry of staffing hours in the PBJ Application and file submissions using the 4.10.0 data specifications will be restricted to a maximum of 22.5 hours per employee ID, per day.

April 1, 2026: fileSpecVersions 2.00.0, 2.00.3, and 4.00.0 will no longer be accepted by the PBJ Application.

Important Reminder: Due to Windows 10 no longer being supported by Microsoft, devices that are still running Windows 10 can no longer access the CMSNet QIES VPN as of November 15, 2025, which impacts both PBJ submissions and CASPER reporting. It's strongly recommended that the end-user device be upgraded to Windows 11 or an alternative operating system. If you are unsure if your device is upgraded to Windows 11, please check with your internal IT department.

Discussion of Submitted Q & A... Shawnna Haley, CMS

Q1: Instead of having to enter weekly hours, why can there not be a program designed to pull up a full month then put all hours in then save for the whole month instead of having to do it week by week?
A1: Hours can be submitted whenever the facility or vendor would like. PBJ does not have a weekly or monthly limit. An entire quarter can be submitted at once or it could be done daily, as long as there is not an attempt to enter hours beyond the current date. If this is a vendor limitation, it would need to be addressed by the vendor doing the processing. Facilities can also utilize the PBJ Excel to XML Template to input a whole month of data.

Q2: If we are using a third party or vendor to submit our quarterly file; is there anything required for us to do in regards to these new specs (PBJ Data Specifications V4.10.0)? Currently our payroll system creates the XML file, and we upload into third party software. We do NOT send directly to CMS; the third-party system sends the submission.

A2: For providers who use a vendor, there is no action required. Vendors have been notified of the data specification update and the timeline. If you would like, you can double check with your vendor to ensure that they are updating to PBJ Data Specifications version 4.10.0.

Q3: Is there a planned move date for PBJ to be migrated to iQIES?
A3: We don't have details we can share at this time.

Open Q and A Session...Shawnna Haley, CMS

Q4: For facilities that enter PBJ hours manually, will anything change beyond the new 22.5-hour daily limit per employee?
A4: No—nothing else will change for facilities entering hours manually. The only new requirement is to ensure that no employee exceeds the 22.5-hour maximum per day.

Q5: Where can I find the technical files, including data specifications, Excel templates and XSD for PBJ specification version 4.10.0 discussed on the call? Do I need to log in or have an account to access this?
A5: Go to -> https://www.cms.gov/medicare/quality/nursing-home-improvement/staffing-data-submission (all the specs and technical files are posted here). Scroll down to the end of the page to Downloads section. In the Downloads section, select "*PBJ Data Specs (V4.10.0) 01-16-2026 (ZIP)*" for the PBJ data specifications package, select "*PBJ-Excel-to-XML-Template-v-4-10-0 (ZIP)*" for the Excel to XML template, select "*nhpbj_4_10_0 (ZIP)*" for the XML schema (XSD) file. No login is required. It's an open CMS webpage that anyone can access.

Q6: It sounds like there are no structural changes to the XML itself—only enforcement of the 22.5-hour rule. In that case, is updating the file specification version to 4.10.0 the only change required?

A6: For vendors and programmers:

Header section

- fileSpecVersion fixed value has changed from 4.00.0 to 4.10.0

Employee section

- hireDate has changed from maxInclusive value of 2025-12-31 to maxinclusive value of 2050-12-31
- terminationDate has changed from maxInclusive value of 2025-12-31 to maxinclusive value of 2050-12-31
- You may have already incorporated this update in December. If not, you should do so now.

Staffing section – no changes

Shared types section

- HourEntry maxinclusive has changed from 24 to 22.5

Census section.

- This was removed from 4.00.0, but if you still have programming from older versions, you should remove it.

A6: For facilities that use the template to submit.

The XSD and the Excel template both enforce the new constraints, so you must use the new 4.10.0 template. If you try to use an existing file and just change the version to 4.10.0 you will receive errors. You should delete any old templates you have saved.

Q7: We currently export an XML file from our Workday system using the 4.0.0 XML structure. As we transition to 4.10.0, aside from updating the file specification version, are there any actual changes to the XML structure itself?

A7: If you're already submitting using the 4.00.0 XML structure, the format will look essentially the same in 4.10.0. The only updates involve the validation constraints, not the data elements themselves. But you need to make sure you are using the 4.10.0 template to export.

Q8: The item change report lists three updates—file spec version, hours, and the data spec version. I understand the file spec update and the hours change, but I don't see anything in the XML related to the data spec version. As a vendor, since our clients upload their own files, does the data spec version impact the XML upload process in any way, given that this element doesn't appear in the XML structure?

A8: The 'data spec version' is simply an internal reference we provide so you know when a new specification has been released. It's not part of the PBJ submission file, and you don't need to include or modify anything related to it in your XML uploads.

Q9: If a file is rejected because an employee exceeds the 22.5-hour daily limit, are we expected to adjust the hours, so the total is 22.5 or less? And in deciding how to handle the extra hours, is it up to us to determine whether to enforce the limit within our system or during the export process?

A9: The policy manual clearly outlines the meal break policy and states the max hours that can be reported per employee ID per day is 22.5. No one should be submitting more than 22.5 hours per employee ID per day. The XSD and template are now enforcing that rule to the benefit of the user.   If vendor programming chooses not to enforce the limit, the file will still be rejected by the PBJ system. Additional policy questions can be directed to CMS Policy Mailbox @ nhstaffing@cms.hhs.gov.

Q10: Do you have documentation that outlines the Windows operating system requirements for accessing the CMS VPN? Our clients connect through the VPN themselves, and we need to inform them that they may need to upgrade to Windows 11. Is there a specification or reference we can share with them? I didn't see anything detailing the supported Windows versions—did I miss it?

A10: A copy of the notification can be found here: https://qtso.cms.gov/news-and-updates/cmsnet-end-support-windows-10.

Q11: When will the PBJ Excel to XML template for version 4.0.0 stop being accepted, and after that point, should we simply download and begin using the new 4.10.0 template?

A11: You can use the 4.0.0 Excel to XML template until March 31st. Beginning April 1, the older specs will no longer be accepted, and everyone must use version 4.10.0. You can find the 4.10.0 template here -> https://www.cms.gov/medicare/quality/nursing-home-improvement/staffing-data-submission and go to -> Downloads.

Q12: I use a third-party vendor to report employee hours, and it sounds like they should receive the updated PBJ specifications and provide me with the revised file. I also use the CMS spreadsheet to report contract hours. Will I simply need to replace my current spreadsheet with the new 4.10.0 version when submitting those hours—is that correct?
A12: Yes, that's correct. https://www.cms.gov/medicare/quality/nursing-home-improvement/staffing-data-submission and go to -> Downloads and the top three links point to the specific template versions. The older versions are still listed right now because they haven't been removed yet, but after March 22, 2026, you must be sure to download and use version 4.10.0 instead of any earlier versions. We will remove the outdated templates later to avoid confusion, although some links will remain because they contain other useful information. If anything new is added to this section in the future, we'll announce it in the text above and in the Updates section.

Q13: I work for a vendor that supports this interface, and I'm wondering why this update has such a short turnaround time. We're scrambling to complete the changes and distribute updates to all of our customers before the deadline. I know these updates don't happen often, but is there a reason the timeline is so tight, and could CMS consider providing more lead time for future changes?
A13: Yes, we recognize that this turnaround time is shorter than what we've allowed in the past. The rationale was this update mainly adjusts the maximum hours from 24 to 22.5, and we expected the impact to be relatively small. That said, we understand your concerns and appreciate the feedback. We'll take this back and consider providing more lead time for future updates.

Q14: Since I enter my facility's PBJ hours manually, will anything change in how I enter them with the new update?
A14: If you enter hours manually through the PBJ user interface, the system will automatically enforce the new rule. The software will simply prevent you from entering more than 22.5 hours for any employee in a single day.

Q15: Will there be another webinar like this offered again in the near future?
A15: We don't have another webinar scheduled at this time, so I don't have a date to share. If we do schedule another session, we'll send out a notification similar to the one you received for this webinar so you can register and attend.

Q16: Which vendors were notified about the PBJ update?
A16: All registered PBJ vendors were notified.

Q17: After uploading our hours, I wasn't able to pull the CASPER report. Is there a reason it wasn't available within 24 hours?

A17: If the CASPER report didn't generate automatically, you can try running it manually. Usually, when a report doesn't appear, it means there was an issue with the file. You can check for errors under 'My Submissions' in PBJ. If you still can't resolve the issue, please submit a Help Desk ticket at iqies@cms.hhs.gov. Note that the 2026 validation reports may not appear at the top of my "My Submissions" list; you many need to scroll to another page to see them.

Q18: Manual entry in PBJ only allows one week at a time, which is slow. Is there a faster way to submit hours?

A18: Yes. Anyone can submit PBJ data using an XML file, not just vendors. You can upload all of your staffing information for an entire quarter in a single XML file instead of entering hours manually week by week. Go to https://www.cms.gov/medicare/quality/nursing-home-improvement/staffing-data-submission - Under Downloads - download the excel "PBJ-Excel-to-XML-Template-v-4-10-0 (ZIP)" . Open the downloaded file from your computer, Instructions on the first tab provide all the information. Follow the instructions to fill in the employee information. If you have no new employees to add, you can delete the Employee tab. If you're only submitting hours, you can use just the Staffing Hours tab. The template includes instructions to guide you through what is required.

Q19: Windows 10 Enterprise LTSC is supported by Microsoft until October 2026. Will it also be blocked from accessing CMSnet?

A19: The policy restriction is for all Windows 10 versions.

Q20: Will there be a training session on how to prepare PBJ file with employee hours to submit?

A20: No training sessions are planned at this time. You can find instructions how to do that within the template, and more information in the user guide here https://qtso.cms.gov/system/files/qtso/PBJ_Provider_User_Guide_4.00.1.pdf

Q21: Will the new PBJ Excel XML Template v 4.10.0 fix the 2025 hire date issue during the export process?

A21: Yes, the hire and termination dates now go to 2050, The warning will be gone.

Q22: How do I determine if my vendor is registered or if they received the message about the PBJ Data Specification updates?

A22: You need to check with your vendor directly.

Q23: Is there a way to submit additional RN coverage hours if PBJ rules do not allow those same hours to be reported?

A23: PBJ only accepts paid, auditable hours. If the extra RN hours aren't paid, they cannot be submitted in PBJ.

Q24: We're currently using PBJ Excel to XML version 4.1.17.6. Will this version still work with the new 4.10.0 requirements?

A24: That version number doesn't match any of the PBJ Excel to XML templates provided by CMS, so it's likely the version of your vendor's software rather than a CMS version. Your vendor should be releasing an updated template or export option that supports file spec 4.10.0.

Q25: Are there instructions on how to add the Add Developer tab in Excel?

A25: Instructions are included in the PBJ-Excel-to-XML-Template-v-4-10-0 (ZIP).

Closing Comments...Shawnna Haley, CMS

I would like to thank the presenters and participants for joining the call today to keep up to date on the future changes to the PBJ Submission System. We hope you have found the information presented helpful. Please note that minutes will be posted on the QTSO Vendor page, along with the important resources. If you have technical questions in the future, please send them to the CMS mailbox at iQIES@cms.hhs.gov.

Important Resources

QTSO Websites
https://qtso.cms.gov
https://qtso.cms.gov/providers/nursing-home-mdsswing-bed-providers
https://qtso.cms.gov/vendors/payroll-based-journal-pbj-vendors

CMS.gov – Staffing Data Submission
https://www.cms.gov/medicare/quality/nursing-home-improvement/staffing-data-submission

E-mail PBJ Technical Issues
IQIES@cms.hhs.gov

E-mail PBJ Policy Questions
nhstaffing@cms.hhs.gov