NETHEALTH: CREATING THE CMS PBJ EXPORT FILE

The CMS PBJ Export is an export-only report containing staffing and labor data in a format that meets CMS Staffing Data Submission Payroll Based Journal (PBJ) requirements. The export contains all labor as soon as it is logged. A "How To" in Net Health with details about the report can be found here CMS PBJ Export.

Use the following steps to run and create the PBJ export file:

1. Go to **ReportsCMS PBJ Export**
   o Can be found in the Reports menu at a specific site or while signed in to Administration
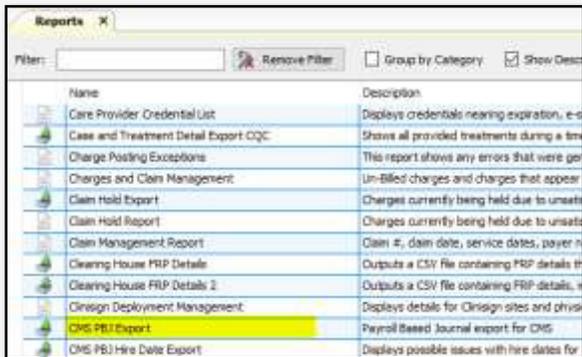
2. Enter the export selection parameters

   o **Export Date Range**: beginning and ending dates for selecting data
   o **File Type**: CSV or XML
   o **Site of Service**: choose the site for selecting the data
   o **Therapist(s):** Field defaults to only your name
      1. Click the drop-down arrow (1)
      2. Click the "Clear Filter" button (2)
      3. Click OK (3).
      4. The box should say "All". This will include terminated employees that worked during the selected time period
         • If the "Select All" button is used, only currently active employees will be selected and there may be missing data.
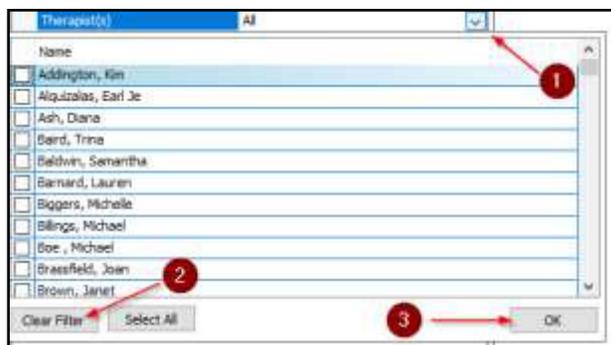
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- XML Version: Leave the default value unless a specific XML version is required. **Version 4.00.0 is the current CMS submission requirement.**

3. Click the **EXPORT** button

4. Enter the **File Name**, **Save as type**, and select the location for saving the file. The file extension of CSV or XML will be automatically added.
    - **NOTE:** for XML files, the save as type will default to CSV. Change it to XML before clicking the Save button or it will be saved with the CSV extension even though it is actually an XML file.
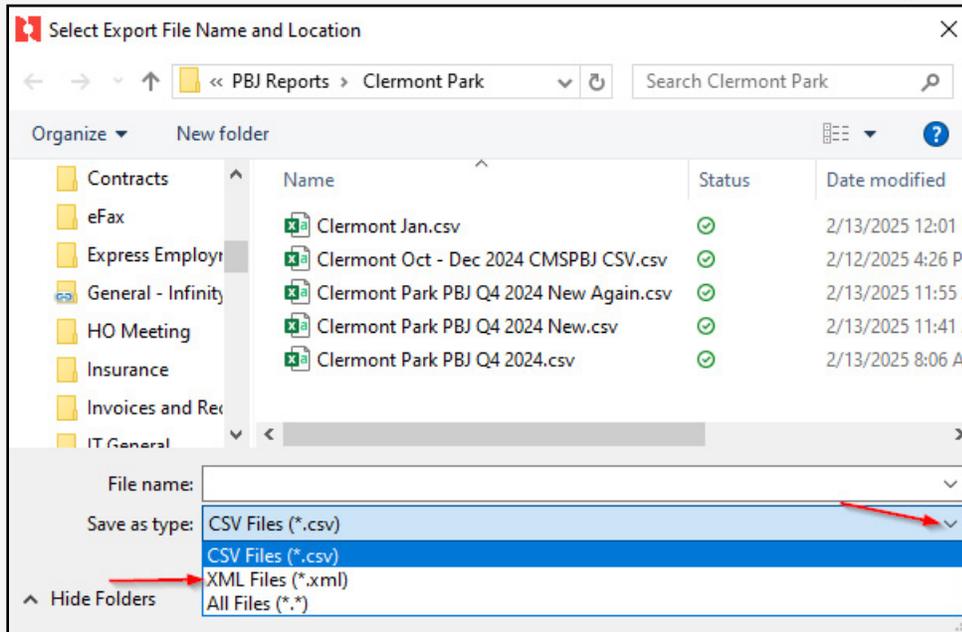
5. Click **Save**

6. Check the exported data to make sure it contains all the employees that worked during the selected time period. The CSV file can be used to make sure that all employees are accounted for in the export. Compare the employees found in the CSV file to the employees listed on the Labor Log report to find any that might be missing. If there are employees that are not in the exported file that should be, please contact the IT department.

7. Email saved file(s) as an attachment to identified personnel

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Sample CSV file:

fileSpec Version	employee Identifier	facilityIdent ifier	facility _ID	state Code	report Quarte r	federalF iscalYea r	software Vendor Name	software VendorE mail	software Product Name	software Product Version	hireDate	terminati onDate	LaborDate	hours	jobTitle Code	payTyp eCode	LastName	FirstNam e
4.00.0	INF007637	MDS001820	700	ID	2	2025	Optima H	support@	Optima H	5	7/30/2024		1/1/2025	6.17	21	3	▓▓▓	▓▓▓
4.00.0	INF007637	MDS001820	700	ID	2	2025	Optima H	support@	Optima H	5	7/30/2024		1/2/2025	5.53	21	3	▓▓▓	▓▓▓
4.00.0	INF007637	MDS001820	700	ID	2	2025	Optima H	support@	Optima H	5	7/30/2024		1/3/2025	5.58	21	3	▓▓▓	▓▓▓
4.00.0	INF007637	MDS001820	700	ID	2	2025	Optima H	support@	Optima H	5	7/30/2024		1/6/2025	3.33	21	3	▓▓▓	▓▓▓
4.00.0	INF007637	MDS001820	700	ID	2	2025	Optima H	support@	Optima H	5	7/30/2024		1/7/2025	5.5	21	3	▓▓▓	▓▓▓

Sample XML file:

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
▼<nursingHomeData xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="nhpbj_4.00.0.xsd"
  ▼<header fileSpecVersion="4.00.0">
      <facilityId>020454</facilityId>
      <stateCode>CO</stateCode>
      <reportQuarter>1</reportQuarter>
      <federalFiscalYear>2025</federalFiscalYear>
      <softwareVendorName>Optima Healthcare Solutions</softwareVendorName>
      <softwareVendorEmail>support@OptimaHCS.com</softwareVendorEmail>
      <softwareProductName>Optima Healthcare Solutions</softwareProductName>
      <softwareProductVersion>5.0</softwareProductVersion>
    </header>
  ▼<employees>
    ▼<employee>
        <employeeId>▓▓▓▓▓▓</employeeId>
        <hireDate>2024-07-29</hireDate>
      </employee>
    ▼<employee>
        <employeeId>▓▓▓▓▓▓</employeeId>
        <hireDate>2023-12-15</hireDate>
      </employee>
    ▼<employee>
        <employeeId>▓▓▓▓▓▓</employeeId>
        <hireDate>2023-07-06</hireDate>
      </employee>
```

ADDITIONAL INFORMATION

1. The CMS PBJ Report must be generated when logged into the <u>corresponding</u> NH operating site.
2. Failing to do so may result in not calculating staff hours associated with that building.
3. OP treatment minutes are not reportable to CMS, therefore are not captured in the CMS PBJ Report. Please make sure when opening a case the correct place of residence: "Skilled Nursing Facility" or "Outpatient" is chosen to ensure their time is accounted for appropriately.
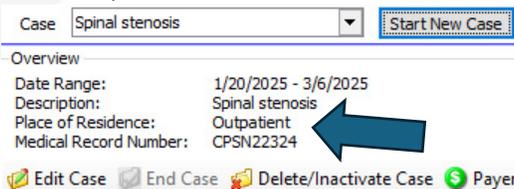
4. **Changing Place of Residence**:
   a. Highlight **Patient Name** in Case Manager
   b. Right Click and **Choose Patient Record**

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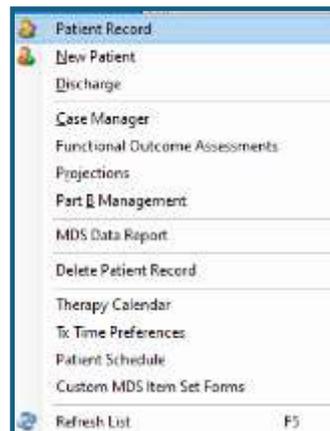
c. Select appropriate **"Place of Residence"**

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