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 ICMS PBJ Export.

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

1. Go to Reports CMS PBJ Export

o Can be found in the Reports menu at a specific site or while signed in to Administration

Rep	Reports X					
riter; [Renove Piller	Group by Category 🔄 Show Desc				
	Name	Description				
	Care Provider Credential List	Displays credentials nearing expiration, e-s				
-	Case and Treatment Detail Export CQC	Shows all provided treatments during a time				
12	Charge Posting Exceptions	This report shows any errors that were ge				
	Charges and Claim Nanagement	Un-Billed charges and charges that appear				
4	Claim Hold Export	Charges currently being held due to unsets				
8	Clain Hold Report	Charges currently being held due to unsate				
	Claim Management Report	Claim #, daim date, service dates, payer n				
	Cleaning House PRP Details	Outputs a CSV file containing PRP details th				
4	Clearing House FiLP Details 2	Outputs a CSV file containing FRP details, it				
	Clinisign Deployment Management	Displays details for Clinisign sites and physi				
	CMS PBJ Export	Payroll Seeed Journal export for DMS				
	CMS PBJ Hire Date Export	Displays possible issues with here dates for				

2. Enter the export selection parameters

Par	arameters					
	Export	Save	Close			
~	Misc					
	Export Dat	e Range	Last Month			
	File Type		xml			
	Site of Serv	/ice				
	Therapist(s)	All			
	XML Version	1	4.00.0			

- 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.

	Therapist(s)	Al	¥
	Name		
	Addington, Kim		
	Alquizalas, Earl Je		•
	Ash, Diana		
\square	Bard, Trina		
	Beldwin, Semantha		
	Barnard; Lauren		
	Biggers, Michelle		
	Bilings, Michael		
	Boe , Michael		
	Bressfield, Joan		
	Brown, Jarvet		
9	Jear Filter Select All		3 — к

>	Misc					
	Export Date Range	Last Month				
	File Type	xml				
	Site of Service	takes and the set of the set of the set				
	Therapist(s)	All				
	XML Version	4.00.0				



- 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.

Select Export File Na	me ar	nd Location		×
← → · ↑	PBJ	Reports > Clermont Park v Ö Sear	ch Clermont	t Park 🔎
Organize 🔻 New	folde	r		
Contracts	^	Name	Status	Date modified
eFax		🔯 Clermont Jan.csv	\odot	2/13/2025 12:01 P
Express Employ	1	😰 Clermont Oct - Dec 2024 CMSPBJ CSV.csv	\odot	2/12/2025 4:26 PM
👼 General - Infinity	5	😰 Clermont Park PBJ Q4 2024 New Again.csv	0	2/13/2025 11:55 A
HO Meeting		😰 Clermont Park PBJ Q4 2024 New.csv	\odot	2/13/2025 11:41 A
Insurance		🖬 Clermont Park PBJ Q4 2024.csv	\odot	2/13/2025 8:06 AM
Invoices and Red	¢			
IT General	¥ -	<		>
File name:				~
Save as type: C	SV Fil	es (*.csv)		
C	SV Fil	es (*.csv)		
∧ Hide Folders A	ML Fi II Files	les (*.xml) s (*.*)		

- 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



Sample CSV file:

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

Sample XML file:

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<facilityid>020454</facilityid>	
<statecode>CO</statecode>	
<reportquarter>1</reportquarter>	
<federalfiscalyear>2025<td>.scalYear></td></federalfiscalyear>	.scalYear>
<softwarevendorname>Optima Healthd</softwarevendorname>	are Solutions
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<softwareproductname>Optima Health</softwareproductname>	care Solutions
<softwareproductversion>5.0<td>vareProductVersion></td></softwareproductversion>	vareProductVersion>
▼ <employees></employees>	
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<employeeid> /employeeI</employeeid>	d>
<hiredate>2024-07-29</hiredate>	
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<employeeid></employeeid>	d>
<hiredate>2023-12-15</hiredate>	
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<hiredate>2023-07-06</hiredate>	

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.



🧭 Edit Case 💮 End Case 💋 Delete/Inactivate Case 🔇 Payer

4. Changing Place of Residence:

- a. Highlight Patient Name in Case Manager
- b. Right Click and Choose Patient Record

Patient Record	
New Patient	
Discharge	
<u>C</u> ase Manager	
Functional Outcome Assessment	8
Projections	
Part B Management	
MDS Data Report	
Delete Patient Record	
Therapy Calendar	
Tx Time Preferences	
Patient Schedule	
Custom MDS Item Set Forms	
Refresh List	F5



c. Select appropriate "Place of Residence"

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one owys			Sided Nursing	Facility	
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11/25/2024 - 12/6/2024	Nedcal Record Number:]	
Part8 Management	Bett	(thing form that		0	
Physicians 🔶 Add 🕅					
1000	Admission ID				flor
External Stress					

