

Quick Guide to Uploading RMTS Participants - Quarterly

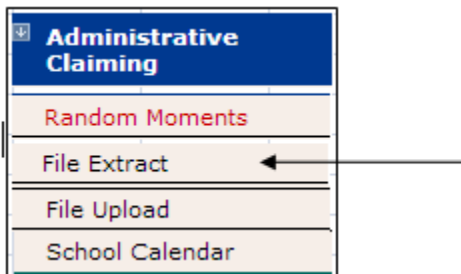
This guide will describe how to extract the RMTS participant list file from the system, create an upload file and then upload that file into the system. This must be completed on a quarterly basis.

Extracting Files

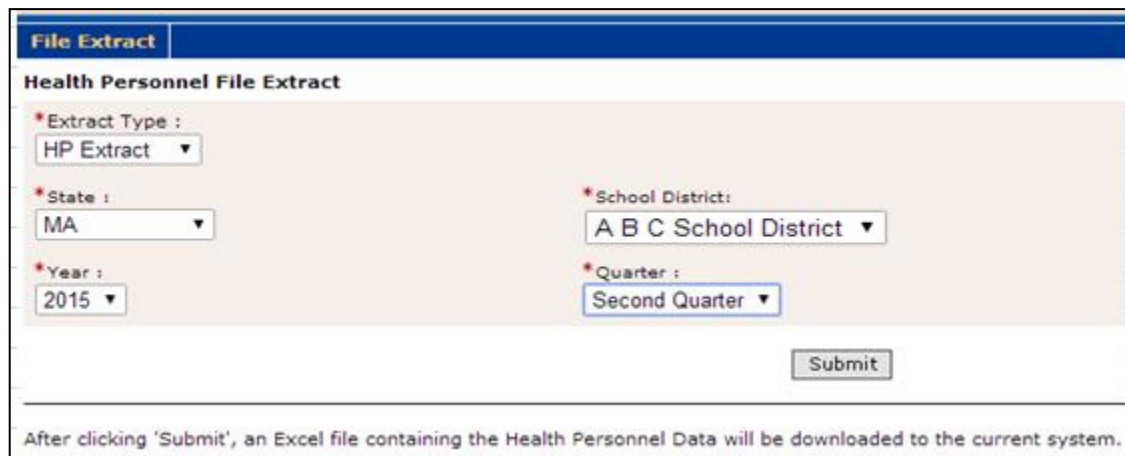
Log into the site: www.chcf.net and enter your User ID and password. If you do not have a User ID, please call 1-800- 535-6741.

When you extract a file from the system it will give you a list of all the active time study participants from the quarter you want to upload. For example, you will pull the extract for 2nd Q FY 17 because that is the quarter you want to upload your file into. You will update the file to reflect any changes you need to make for 2nd Q FY 17.

Step 1: Under “Administrative Claiming” on the left navigation menu, select “File Extract.”



Step 2: Your School District should pre-populate (if you are a vendor, you will see all the schools you manage), use the drop down arrow and select “Year” and “Quarter.” An Excel file containing the RMTS participants will download. Remember to choose the Year and Quarter in the future that you will be working on. Year is ‘fiscal year’ not calendar year, so the quarter 10/1/16 – 12/31/16 is the Second Quarter of Fiscal Year 2017.

A screenshot of a web form titled 'File Extract' with a sub-header 'Health Personnel File Extract'. The form contains several dropdown menus: 'Extract Type' (set to 'HP Extract'), 'State' (set to 'MA'), 'School District' (set to 'A B C School District'), 'Year' (set to '2015'), and 'Quarter' (set to 'Second Quarter'). A 'Submit' button is located at the bottom right of the form. Below the form, a note states: 'After clicking 'Submit', an Excel file containing the Health Personnel Data will be downloaded to the current system.'

Step 3: Click “Submit.” The file containing your school district’s RMTS participants will download to your computer. You may directly open the file or you may save it in Excel on your computer. When you open the file it will look like the RMTS participant list you used to receive from UMMS each quarter.

Creating Upload Files

Use the extracted file as a template which you need to update with any changes for the next quarter. It is important that all the necessary data elements are completely filled in for each participant. If you are adding a new participant that has never been in the system, you can either assign them a ‘true’ Employee ID, if you use them, or you can leave the Employee ID blank (column A) and the system will assign one. Anyone who will not participate in the next time study should simply be removed from the file by deleting the row of their information.

Remember to include the New Hire Date (if applicable) and the Actual Job Title (required field). You may reference Bulletin #28 to confirm all your time study participants should be included in the time study.



New as of FY 2017, you’ll no longer be indicating a ‘Medical Yes/No’ status for participants. Instead, indicate the correct job description for each participant, and choose the correct RMTS/Cost Pool for the participant.

The RMTS/Cost Pools are:

1. Direct Service Providers
2. Administrative Only Providers
3. ABA Providers

*For a detailed list of RMTS/Cost Pools and Job Descriptions, please see the **MA RMTS Job Description List FY17.xls** handout*

License Verification – (Required effective January 1, 2017)

This is will be required for health related professionals providing direct services to students whom your school district is including in the ABA Providers Pool or Direct Service Providers Pool. Be sure to complete all fields for each person. This information will be verified against the state licensing board database to ensure that only Medicaid qualified practitioners are included in either of the Direct Services cost pools.

Details on requested license information:

1. *License information* is only needed for participants who are:
 - a. In the ABA Providers or Direct Service Providers RMTS/Cost Pools
 - b. The staff member is providing a service for which Medicaid requires a professional/clinical license (See **MA RMTS Job Description List FY17.xls** for more information)
2. *License Type* reflects the licensing board name. Copy/paste the license type from the **MA RMTS Job Description List FY17.xls** handout i.e., ‘Registered Nurse’ not ‘RN/LPN.’
3. *License Numbers* field/column must be formatted as TEXT to retain numbers beginning with zero.

Any direct service Time Study Participant whose license cannot be verified by the next quarter will need to be removed from future time studies, or moved to the Administrative Only Providers pool.

Sample Full Upload File:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
Employee ID	Last Name	First Name	Email Address	Job Pool	Job Description	Job Type E or C	Active Yes or No	Fed Fund %	FTE	Work Schedule #1	Supervisors or Email #2	Supervisors or Email #3	Supervisors or Email #4	Actual Job Title	License Number	License Expiration Date	License Type	UMMS Comment	New Hire Date	NPI
1	123	American	Debra	Administrative Only Providers	Nurse Licensed - RN - Medicaid Definition	E	Y	0	1	Schedule A	sup@mail			School Nurse						
2	124	Apple	Heather	Direct Service Providers	Speech/Language Therapist - Medicaid Definition	E	Y	0	1	Schedule A	sup@mail			Speech/language Therapist						
3	125	Apple-Juic	Margaret	Direct Service Providers	Physical Therapist - Medicaid Definition	C	Y	0	3	Schedule A	sup@mail			Physical Therapist						
4	126	Apricot	Maryellen	Administrative Only Providers	Nurse Licensed - RN - Medicaid Definition	E	Y	0	1	Schedule B	sup@mail			Speech/language Therapist						
5	127	Artichoke	Alyson	Direct Service Providers	Speech/Language Therapist - Medicaid Definition	C	Y	0	1	Schedule A	sup@mail			Speech/language Therapist						
6	128	Asparagus	Melissa	Direct Service Providers	Occupational Therapist - Medicaid Definition	E	Y	0	1	Schedule B	sup@mail			Occupational Therapist						
7	129	Avocado	Tanya	Administrative Only Providers	School Psychologist	E	Y	0	1	Schedule C	sup@mail			School Psychologist						
8	130	Onion	Tijen	Direct Service Providers	Speech/Language Therapist - Medicaid Definition	C	Y	0	8	Schedule A	sup@mail			Speech/language Therapist						
9	131	Tomato	Elise	Direct Service Providers	Speech/Language Therapist - Medicaid Definition	C	Y	0	3	Schedule A	sup@mail			Speech/language Therapist						
10	132	Beet	Susan	Direct Service Providers	Speech/Language Therapist - Medicaid Definition	E	Y	0	1	Schedule B	sup@mail			Speech/language Therapist						
11	133	Berry	Debra	Direct Service Providers	Medicaid Billing Personnel	E	Y	0	1	Schedule A	sup@mail			Administrative Assistant						
12	134	Black-eyed	Kelly	Administrative Only Providers	School Psychologist	E	Y	0	1	Schedule A	sup@mail			School Psychologist						
13	135	Blue Chee	Lori	Direct Service Providers	Occupational Therapist - Medicaid Definition	E	Y	0	1	Schedule B	sup@mail			Occupational Therapist						
14	136	Blueberry	Paula	Administrative Only Providers	Nurse Licensed - RN - Medicaid Definition	E	Y	0	1	Schedule B	sup@mail			School Nurse						
15	137	Watermel	Holly	Administrative Only Providers	School Psychologist	E	Y	0	1	Schedule A	sup@mail			School Psychologist						
16	138	Grape	Susan	Direct Service Providers	Occupational Therapist - Medicaid Definition	C	Y	0	1	Schedule B	sup@mail			Occupational Therapist					4/1/2016	
17	139	Broccoli	Kathleen	Administrative Only Providers	School Psychologist	E	Y	0	1	Schedule A	sup@mail			School Psychologist						

Closer Look at Job Pool and Job Description:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	
Employee ID	Last Name	First Name	Email Address	Job Pool	Job Description																
1	123	American	Debra	Administrative Only Providers	Nurse Licensed - RN - Medicaid Definition																
2	124	Apple	Heather	Direct Service Providers	Speech/Language Therapist - Medicaid Definition																
3	125	Apple-Juic	Margaret	Direct Service Providers	Physical Therapist - Medicaid Definition																
4	126	Apricot	Maryellen	Administrative Only Providers	Nurse Licensed - RN - Medicaid Definition																
5	127	Artichoke	Alyson	Direct Service Providers	Speech/Language Therapist - Medicaid Definition																
6	128	Asparagus	Melissa	Direct Service Providers	Occupational Therapist - Medicaid Definition																
7	129	Avocado	Tanya	Administrative Only Providers	School Psychologist																
8	130	Onion	Tijen	Direct Service Providers	Speech/Language Therapist - Medicaid Definition																
9	131	Tomato	Elise	Direct Service Providers	Speech/Language Therapist - Medicaid Definition																

Closer Look at License Information:

O	P	Q	R	S	T	U
Actual Job Title	License Number	License Expiration Date	License Type	UMMS Comment	New Hire Date	NPI
School Nurse	RN259931	1/16/2017	Registered Nurse			
Speech/language Therapist	3390	2/2/2016	Speech Pathologist			
Physical Therapist	19865	5/1/2017	Physical Therapist		8/22/2016	
Speech/language Therapist	8479	3/15/2018	Speech Pathologist			
Speech/language Therapist	1317	3/1/2017	Speech Pathologist			

Once all the changes have been made, save the file to your computer. When saving the file, you MUST use the following naming convention so that it can be uploaded into the system:

HP_TS_State_SD PROVIDER NUMBER_Qtr_Year_file#.xls

Example Decoded:

The file in the above example is for HP (health personnel), for the TS (time study) _ in MA_ with a Provider number of 001123456 (for the ABC School District) _ for the 2nd quarter (Oct-Dec, 2016) _ 2017_first upload. Below is how it should be saved for proper upload:

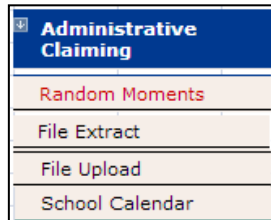
HP_TS_MA_001123456_2_2017_01

You must include the underscore spaces, 01 (for the first upload) the system will add the xls. File should be saved as Excel File Type 'Excel 97-2003 Workbook.'

Uploading Files

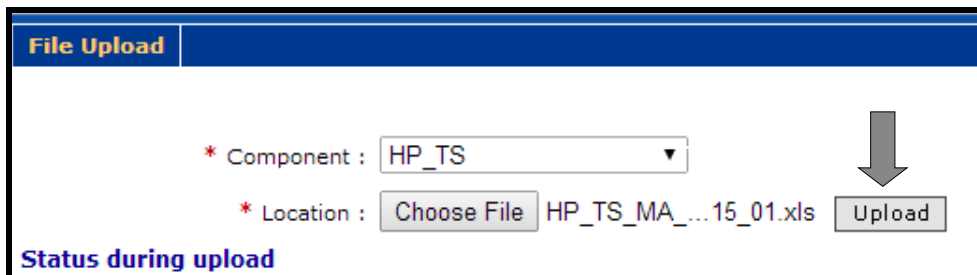
Files must be uploaded approximately 20 days prior to the start of each quarter, even if you have no changes from the current quarter. This enables UMMS to track and ensure the participant data for the entire state is ready to go for quarterly moment generation.

Step 1: Under the “Administrative Claiming” on the left navigation menu, select “File Upload.”



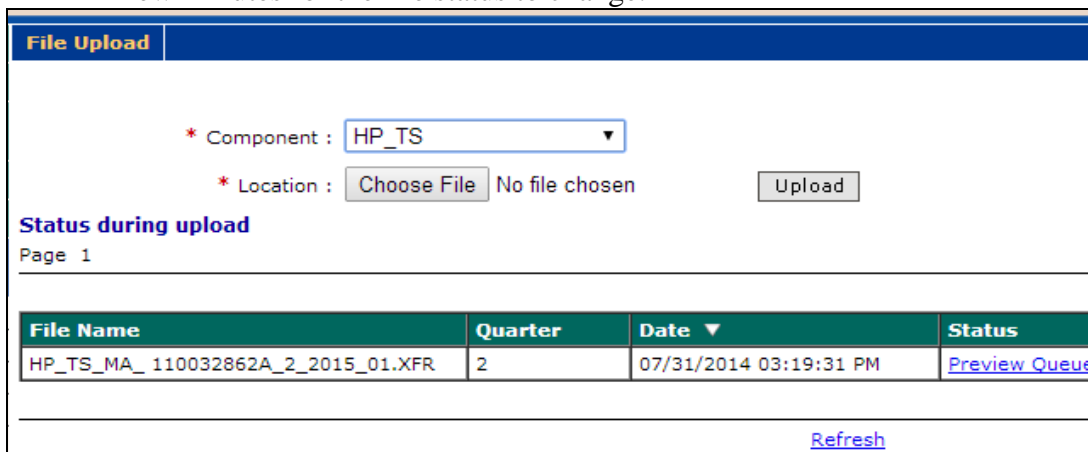
Step 2: The “Component” will pre-populate to ‘HP_TS’. Click “Choose File” to find the file you worked on. Select the file, and then click “Open.” Your file will show next to the “Choose File” button, as seen in the example below.

Note: The file must follow the naming convention described on the previous page.



A screenshot of the 'File Upload' form. The title bar says 'File Upload'. Below it, there is a dropdown menu for 'Component' with 'HP_TS' selected. To the right of the dropdown is a large downward-pointing arrow. Below the dropdown is a 'Choose File' button, followed by the text 'HP_TS_MA_...15_01.xls', and an 'Upload' button.

Step 3: Click “Upload.” The file will show up on the list of files on the bottom section of the screen. The upload process takes a little bit of time, so you may click “Refresh” after a few minutes for the file status to change.

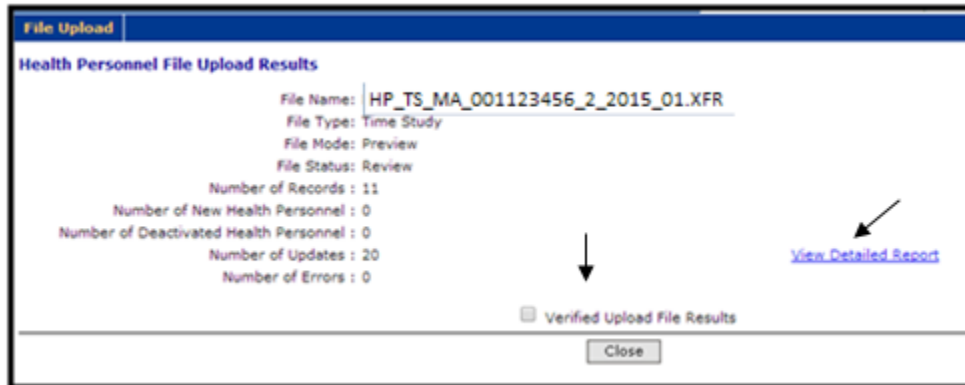


A screenshot of the 'File Upload' form after the upload process. The title bar says 'File Upload'. Below it, there is a dropdown menu for 'Component' with 'HP_TS' selected. To the right of the dropdown is a large downward-pointing arrow. Below the dropdown is a 'Choose File' button, followed by the text 'No file chosen', and an 'Upload' button. Below this is the text 'Status during upload' and 'Page 1'. At the bottom, there is a table with the following data:

File Name	Quarter	Date ▼	Status
HP_TS_MA_110032862A_2_2015_01.XFR	2	07/31/2014 03:19:31 PM	Preview Queue

Below the table is a 'Refresh' button. An arrow points to the 'Refresh' button.

Step 4: When the status changes from “Preview Queue” to “Review”, click on “Review”. This will open up the Health Personnel File Upload Results. Click on the active link(s) called “Viewed Detailed Report.” Each report will give you details on the file you uploaded. See an example below.



Step 5: Review all the reports that have a “View Detailed Report” link. This may include the New Health Personnel, Deactivated Health Personnel, Updates and Error reports. Once all data has been verified to be correct, check the “Verified Upload File Results” box and upload the file.

Note: To confirm you are ready to upload the file, you must click the box in front of the ‘Verified Upload File Results.’ If any file is not uploaded this will exclude your staff from being part of the RMTS pool of participants. Participants who are NOT listed on the upload file will be deactivated for the upcoming quarter.

Step 6: When the file is submitted and uploaded, the status will change to “Successful” when completed. At this point, all changes and additions will be made in the system. You may review the detailed reports at any time by clicking “Successful” and “View Detailed Report.”

Note: If the file ‘Errors’, click on the Error link. The report will show you the issues that caused the file to fail. You must fix the problems in the file that caused it to error. Then start the upload process again.

File Name	Quarter	Date	Status	
HP_TS_MA_001123456_2_2015_01.XFR	2	07/31/2014 03:19:31 PM	Preview Queue	

Note: Remember, you must upload the file, even if there are no changes. Any files that are uploaded that have no changes will read “Successful – no changes”. If a file has been uploaded and you wish to make changes after it has been uploaded, refer to the naming convention rules on page 3.

Status during upload			
Page 1			
File Name	Quarter	Date ▼	Status
HP_TS_MA_001123456_2_2015_01.XFR	2	07/01/2014 02:10:33 PM	Successful - No Changes
HP_TS_MA_001123456_2_2015_02.XFR	2	07/01/2014 02:02:50 PM	Successful

Helpful Tip: When you have completed your upload and your file status says ‘Successful,’ return to the ‘File Extract’ page and download a new list of your RMTS participants. This file should now exactly match your upload file, including removal of any staff, addition of new staff and changes to existing staff information.

Please call 800-535-6741 or email UMASS if you are having any trouble uploading the file.
Schoolbasedclaiming@umassmed.edu