Payroll Based Journal (PBJ) Checklist

☐ Identify a PBJ champion in your organization. This will be the individual that will complete all of the subsequent steps.

☐ Become familiar with the requirements of the Payroll Based Journal
   ☐ Read the latest version of the Payroll Based Journal Manual available [here](https://www.qtso.com/cmsnet.html)
   ☐ Read the PBJ Policy Manual FAQs, available [here](https://www.qtso.com/accesspbj.html)
   ☐ Read the PBJ Technical Specifications, available [here](https://www.qtso.com/cmsnet.html)

Help on many of the steps listed here can be found on the [QTSO e-University](https://www.qtso.com/cmsnet.html)

☐ Set up your PBJ user account
   ☐ Obtain a CMSNet User ID ([https://www.qtso.com/cmsnet.html](https://www.qtso.com/cmsnet.html))
   ☐ Obtain a PBJ QIES Provider ID ([https://www.qtso.com/accesspbj.html](https://www.qtso.com/accesspbj.html))

☐ Crosswalk your organization’s staffing categories to the 35 mandatory Job Codes in Table 1 of the PBJ Policy Manual

☐ Add staff unique IDs and hire dates into PBJ

☐ Determine if you will submit data manually, via XML, or utilizing a combination of the two.
   ☐ Determine how you are going to track hours for contract employees (e.g. therapy, medical directors, etc.)
   ☐ Determine whether your time and attendance vendor has the capacity to support you with PBJ submissions
      ▪ If your time and attendance vendor does not have a solution for PBJ, determine whether or not you would like to explore an alternative vendor. If yes, start researching vendors who offer PBJ solutions. [Check out this helpful list of vendors with PBJ solutions from AHCA](https://www.qtso.com/cmsnet.html)

☐ Submit test data to PBJ

☐ Review the PBJ Final File Validation Report in CASPER

☐ Review the 1700D Employee Report, 1701D Census Report, and 1702S Staffing Summary reports in CASPER

☐ Identify and review any issues that you ran into during the first test submission and start gathering data for a second submission

Got questions?

- For policy questions, email [NHstaffing@cms.hhs.gov](mailto:NHstaffing@cms.hhs.gov)
- For technical questions, email [NursingHomePBJTechIssues@cms.hhs.gov](mailto:NursingHomePBJTechIssues@cms.hhs.gov).
- You can also email your questions to AHCA staff at [staffdatacollection@ahca.org](mailto:staffdatacollection@ahca.org).