

WA Schools 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.

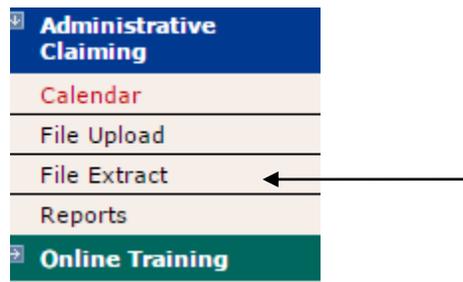
Extracting Files

Log into the site: <https://www.chcf.net/chcfweb/> and enter your User ID and password. If you do not have a User ID, please call 1-800-535-6741 or email MedicaidAdmMatch@umassmed.edu.

When you extract a file of current participants from the system it will give you a list of all the active time study participants, including any changes to that information that have already been shared with UMMS via the 'Change of Status' process. Therefore, it is important to always begin by extracting the participant data with an effective date of the upcoming quarter, i.e. the quarter in which you are working on making updates. The schedule below provides a reference of the quarterly schedule/due dates:

Participant Upload Due Date	Quarter Number	Quarter Start – End Dates
Approximately 9/1	Q2	10/01 – 12/31
Approximately 12/1	Q3	1/1 – 3/31
Approximately 3/1	Q4	4/1 – 6/30

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



Step 2: Your “School District” should pre-populate, use the drop downs to select “Year” and “Quarter.” An Excel file containing the RMTS participants will download.

The image shows a web form titled 'File Extract' with a blue header. Below the header is a sub-header 'Health Personnel File Extract' and a note 'Fields marked with an asterisk'. The form contains several fields: '*Extract Type:' with a dropdown menu showing 'HP Extract'; '*State:' with a dropdown menu showing 'WA-SCHOOLS'; '*Year:' with a dropdown menu showing '2016'; '*School District:' with a dropdown menu showing 'A B C School District'; and '*Quarter:' with a dropdown menu showing 'Second Quarter'. A 'Submit' button is located at the bottom right of the form. Arrows point to the 'Year', 'School District', and 'Quarter' dropdown menus.

After clicking 'Submit', an Excel file containing the Health Personnel Data will be downloaded to the current

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.

Creating Upload Files

Use the extracted file as a template and update the file with any changes for the next quarter. It is important that all the necessary data elements are completely filled in for each participant.

Employee ID	Last Name	First Name	Email Address	Job Description	Job Type E or C	Active Y or N	Fed Fund %	Medical Yes or No	Work Schedule	Supervisor Email #1	Supervisor Email #2	Supervisor Email #3
1234	Apple	Amy	Apple@mail.net	Nurse	E	Y	0	Y	Schedule A	supervisor@mail.net		
1235	Banana	Betty	Banana@mail.net	Occupational Therapist	E	Y	0	Y	Schedule A	supervisor@mail.net		
1236	Cucumber	Bill	Cucumber@mail.net	Physical Therapist	E	Y	0	Y	Schedule B	supervisor@mail.net		
1237	Dill	Jim	Dill@mail.net	Psychologist	E	Y	0	Y	Schedule D	supervisor@mail.net		
1238	Eggplant	David	Eggplant@mail.net	Nurse	E	Y	0	Y	Schedule A	supervisor@mail.net		
1239	Fruit	Elaine	Fruit@mail.net	Social Worker	E	Y	0	Y	Schedule C	supervisor@mail.net	boss@mail.net	
1240	Grape	George	Grape@mail.net	Paraprofessional	E	Y	50	N	Schedule E	supervisor@mail.net		
1241	Herb	Henry	Herb@mail.net	Elementary Teacher	E	Y	0	N	Schedule T	supervisor@mail.net		
1242	Iceberg-Lettuce	Sally	Iceberg-Lettuce@mail	Secondary Teacher	E	Y	0	N	Schedule T	supervisor@mail.net		
1243	Kiwi	Susan	Kiwi@mail.net	Office/Clerical	E	Y	0	N	Schedule O	supervisor@mail.net		
1244	Lemon	Anne	Lemon@mail.net	Occupational Therapist	E	Y	0	Y	Schedule B	supervisor@mail.net		
1245	Mango	Joyce	Mango@mail.net	Physical Therapist	E	Y	0	Y	Schedule B	supervisor@mail.net		
1246	Nectarine	Patricia	Nectarine@mail.net	Social Worker	E	Y	25	Y	Schedule C	supervisor@mail.net	boss@mail.net	
1247	Orange	Fran	Orange@mail.net	Social Worker	E	Y	0	Y	Schedule C	supervisor@mail.net	boss@mail.net	
1248	Peach	Peter	Peach@mail.net	Occupational Therapist	E	Y	0	Y	Schedule D	supervisor@mail.net		

The data elements/columns in the file are:

Employee ID (Must be unique for each participant. Leave blank to let system assign, or use a true HR/payroll ID#)

Last Name

First Name

Email Address

Job Description (copy/paste ‘valid values’ from Job Descriptions list)

Job Type E or C (employee or contractor)

Active Y or N

Fed Fund % (enter as a whole number rather than as a percent or decimal. So an employee who is 50% federally funded should be entered as ‘50’)

Medical Yes or No (enter Y or N to indicate whether this participant submits direct service claims through the SBHS program)

Work Schedule (must match a Work Schedule Group that was customized for your district and for which a work schedule group calendar has been entered)

Supervisor Email #1 (required – will be cc’d on reminder emails if participant fails to answer an assigned moment)

Supervisor Email #2 (optional – if provided will also receive cc on reminder emails)

Supervisor Email #3 (optional – if provided will also receive cc on reminder emails)

If you are adding a new participant that has never been in the system, you can either assign them a ‘true’ Employee ID (such as an ID# from your HR/Payroll system) 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. When you are adding job descriptions, use the “WA-Schools Job Descriptions” handout. Copy/paste the titles into the RMTS participant file. This will ensure that the RMTS system recognizes the job descriptions.

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_WA-Schools_MAC VENDOR NUMBER_Qtr_Year_file#.xls

Example Decoded:

The file in the above example is for HP (health personnel), for the TS (time study) _ for WA-SCHOOLS with a Provider number of 10233 (for the ABC School District)_ for the 2nd quarter _ 2016_01 (first upload). Below is how it should be saved for proper upload:

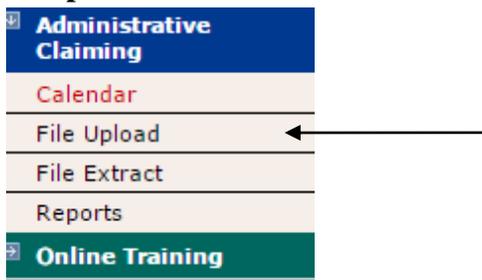
HP_TS_WA-Schools_10233_2_2016_01

You must include the underscore spaces, 01 (for the first upload) the system will automatically add the proper file extension 'xls.' You must upload the file in an Excel format; 'Excel 97-2003Workbook'

Uploading Files

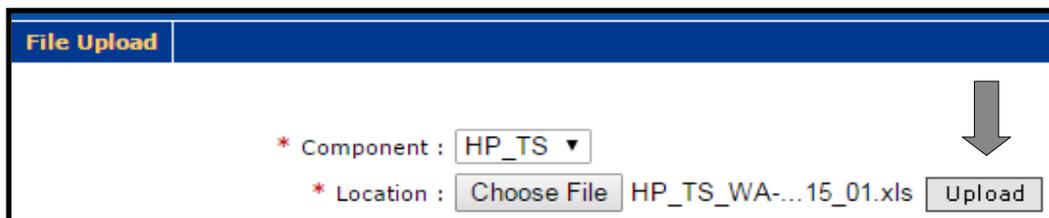
Files must be uploaded approximately 25 days prior to the start of each quarter, even if you have no changes from the current quarter. This enables UMMS to track and ensure the participant data for the entire state is ready to go for quarterly moment generation.

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 name will show next to the “Choose File” 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.

State: WA-SCHOOLS School District: A B C School District Year: 2016

File Upload

Fields marked with an (*) are mandatory fields

* Component : HP_TS
 * Location : Choose File No file chosen

Status during upload
 Page 1

File Name	Quarter	Date ▼	Status	Uploaded By	Delete
HP_TS_WA-SCHOOLS_k8765_2_2016_01.XFR	2	08/03/2015 10:29:38 AM	Preview Queue	AudetteE	<input type="checkbox"/>

[Refresh](#)

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.

File Upload

Health Personnel File Upload Results

File Name: HP_TS_WA-SCHOOLS_k8765_2_2016_01_20150803102938.XFR
 File Type: Time Study
 File Mode: Preview
 File Status: Review

Number of Records : 15
 Number of New Health Personnel : 15
 Number of Deactivated Health Personnel : 0
 Number of Updates : 0
 Number of Errors : 0

[View Detailed Report](#)

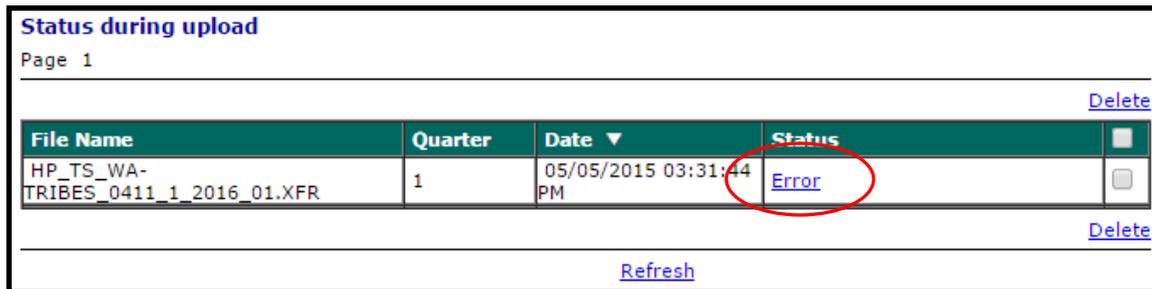
Verified Upload File Results

Step 5: Review all the reports that have a “View Detailed Report” link. This may include the ‘New Health Personnel’, ‘Deactivated Health Personnel’, ‘Number of Updates’ and ‘Number of 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.’ 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” from the list of uploaded files.

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 delete the Error file by checking the box under “Delete.” Then start the upload process again.



Status during upload
Page 1

File Name	Quarter	Date ▼	Status	<input type="checkbox"/>
HP_TS_WA-TRIBES_0411_1_2016_01.XFR	1	05/05/2015 03:31:44 PM	Error	<input type="checkbox"/>

[Delete](#) [Delete](#)
[Refresh](#)

Note: Remember, you must upload the file, even if there are no changes. Any files that are uploaded that have no changes will display a status of “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 2.

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.

Questions?

**Call the UMass RMTS Support team at 800-535-6741
(Hours: 7:30 am – 7:30 pm Eastern Time)
or email
MedicaidAdmMatch@umassmed.edu**