



PCG: SPL Overview and Best Practices

2018 School-Based Services
Conference

August 16 - 17, 2018

PCG | *Education*

Agenda

- SPL Driving Factors
 - A look into the inner workings of what goes in to the SPL
- Informative Checklist for SPL and Calendar
- Questions

Staff Pool List Driving Factors

Staff Pool List Driving Factors

1. Staff Pool List (AOP, DS, CM, PC) and Credentials
2. Participants/Start and End Dates
3. Direct Replacements
4. Name/Email Changes
5. Long-Term Subs
6. Vacancies
7. RMTS CC
8. Shifts/Calendars

**By addressing
SPL factors, we
hope to increase
awareness on
each topic!**

Staff Pool List (AOP, DS, CM, PC) and Credentials

AOP Staff – Administrative and non-credentialed employees

Direct Service – Providers that perform direct services and have proper credentials

Case Management – Assesses, develops, refers, and monitors student education plans

Personal Care – Provides a range of human assistance to persons with disabilities and chronic conditions

Participants

- It's important for participants to know they are on the Staff Pool List and for them to be aware of the RMTS.

Aware Participants:

Have an understanding about the program and how their moment contributes.

Realize they can potentially be selected for a random moment and look for RMTS notifications.

Promptly answer their RMTS survey with accuracy and appropriate detail.

Are not as likely to receive a follow-up question from PCG coders.

Unaware Participants:

Do not understand the program and may feel that it is a waste of their time.

Ignore or delete RMTS notifications.

Need reminders from their ISD/LEA coordinator and sometimes do not provide enough detail.

Are more likely to receive follow-up questions from PCG coders.

New Participant Welcome Letter!

Start and End Dates

- Start Date – When a SPL participant will become active in a position.
- End Date – When a SPL participant will become inactivated from a position.
- When editing a start or end date, you must be in the specific quarter in which the desired date falls into.

Scenario: The need to add a staff member into a position as of 9/27/2018

- A staff member needs to be added to the an existing position on the SPL
- October – December 2018 is open for updates (July – September is not)
- The PCG claiming system opens to the quarter in which the date falls under (JS)
- The system will only allow you to add as early as 10/1/2018 (First day of OD quarter)

Solution :

- Use the dropdown menu and change to the previous quarter (JS)
- Even though a quarter is certified, making changes to a position such as start/end dates, direct replacements, and name changes are still allowed

Direct Replacements and Name/Email Changes

- Direct Replacement – Within a single position, there will be a different staff member placed into the position than currently listed.

- Example – Nancy Drew was directly replaced by Pippi Long.

Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll		ndrew@123pcgus.com	Drew, Nancy	10/01/2014	10/10/2014	✘
District Payroll		plong@123pcgus.com	Long, Pippi	10/11/2014	04/30/2015	✘

Name/Email Changes

The changing of a staff members name or email address can be complete in the system at any time.

Check to enable editing of last name/email ONLY if you are NOT performing a replacement. To perform a replacement please select an appropriate option above.

Employment Type: ?

Start Date: ?

End Date: ?

Email:

Long-Term Subs

- The temporary addition of a staff member to a position who's original staff member is out for long-term leave.

Step 1 – Once on the SPL page, click on the staff member/position that will have the long-term sub.

The screenshot shows a web interface for managing staff. At the top, there are several dropdown menus: 'Cost Pool' (AOP), 'Job Category' (Early Identification/Intervention Personnel), and 'Shift Type' (Full Time). Below these is a text field for 'Job Position Id' (43558), and empty fields for 'Job Title' and 'Description'. A table lists staff members with columns for Employment Status, Employee ID, Email, Name, Start Date, End Date, and Delete. One row is visible: District Payroll, new@enhancement.com, Enhancement, New, 10/01/2018, and a delete icon. Below the table is an 'Action' dropdown set to 'Edit'. The 'Edit staff' form contains a checkbox for enabling editing of last name/email, an 'Employment Type' dropdown (District Payroll), 'Start Date' (10/01/2018), 'End Date' (mm/dd/yyyy), 'Email' (new@enhancement.com), checkboxes for 'No Email' and 'Add Substitute', and text fields for 'Employee ID', 'First Name' (New), 'Middle Name', 'Last Name' (Enhancement), 'Suffix', 'Phone', and 'Email CC Person'.

Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll		new@enhancement.com	Enhancement, New	10/01/2018		✖

Long-Term Subs cont.

Step 2 – Click on the check box that lists “Add Substitute” New required field will be displayed for the sub’s information.

Create substitute staff:

Start Date: ?	<input type="text" value="10/01/2018"/>
End Date: ?	<input type="text" value="mm/dd/yyyy"/>
Employment Type:	<input type="text" value=""/> (Required)
Email (new@enhancement.com):	<input type="text"/> (Required)
	<input type="checkbox"/> No Email
Employee ID: ?	<input type="text"/>
First Name (New):	<input type="text"/> (Required)
Middle Name:	<input type="text"/>
Last Name (Enhancement) :	<input type="text"/> (Required)

Long-Term Subs cont.

Step 3 – Enter the long-term sub’s information into the required fields and click save changes. An additional screen will display with policy information regarding long-term sub requirements. If the long-term sub meets these requirements, confirm your changes and continue.

Please Confirm

Can you confirm the long-term sub being entered into the position meets the following:

- A long-term substitute staff must be employed by the ISD/Local Education Agency(LEA) for at least 30 calendar days within the quarter
- The long-term substitute staff must meet all of the program requirements and provider qualifications necessary to participate in the Medicaid school based services program staff pool
- If listed on the staff pool list, the substitute staff must complete the time study moment
- All audit liability for the financial data reported and the tracking of the moments is the responsibility of the ISD/LEA reporting entity

Step 4 – The long-term sub will be displayed in the position.

Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll		new@enhancement.com	Enhancement, New	10/01/2018		✘
District Payroll		awesome@stuff.com	Stuff, Awesome	10/02/2018		✘

Action:

Edit staff:

There is currently a substitute in the position.

Long-Term Subs cont.

Removing

- The removal process is the same as vacating an ordinary position.

Step – 1 Click on the position filled with the long-term sub. Use the action dropdown and select vacate.

District Payroll awesome@stuff.com Stuff, Awesome 04/10/2018

Action: Vacate

End Date for Stuff, Awesome: 5/10/2018

Are you sure you want to create a vacancy for this position?

Edit Another? Cancel Save Changes


Once vacated, the original staff member will be back in the position and displayed on the SPL. When clicking on the position, a history will display all staff members in the position.

Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll		awesome@stuff.com	Stuff, Awesome	04/10/2018	05/10/2018	✘
District Payroll	E0000023844	test23844@test.com	Stacy	08/16/2014		✘

Long-Term Subs cont.

Financials

- Any long-term sub that was in a position will have their own line item on the financial pages. Entering costs for long-term subs is the same as normal staff.
- SUBSTITUTE appears before the staff members name

Name ^	Job Category	Cost Pool	Job Title	Job Span	Salary	Benefits	Materials & Supplies	Staff Professional Dues & Fees	Staff Travel & Training	Fed Offset	State Offset	Gross	Net
SUBSTITUTE: Stuff, Awesome	Personal Care Services Provider	Pers. Care	Personal Care		\$50,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$50,000.00	\$50,000.00

Questions?!

Vacancies

- A vacancy is a position place holder, best used when there are intentions to fill it.
- A position with the first and last name (Vacancy, Vacant) is not a proper vacancy.

Cost Pool	Email	Emp Id	Name ▲	Job Category	Job Position Id	Job Title	Person History
Personal Care	va@va.com		Vacancy, Vacant	Personal Care Services Provider	26816	Room31	

- The Claiming system will see this position as being filled by a person named Vacant Vacancy and potentially send the position moments.
- The moment would need to be completed, but in this case there is no real staff member in the position, therefore the moment would count against compliance.
- Part of a PCG check to notify LEAs of any potential improper positions

Quick Fix – Click on the position, use the action dropdown and properly vacate it from the position

RMTS CC

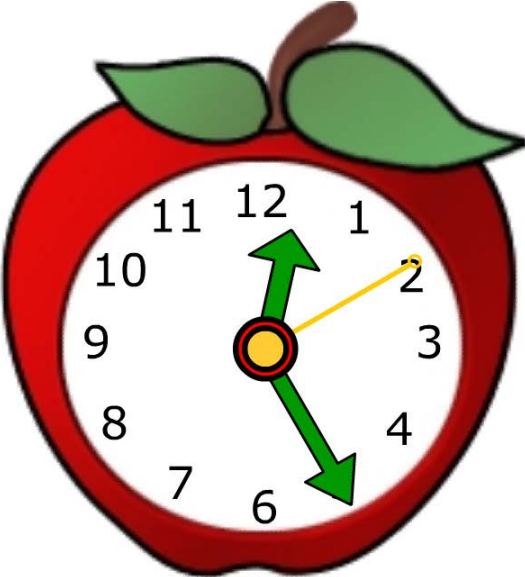
- Selecting a coordinator to be the CC staff member will increase the likelihood a moment will be compliant.

Location	User Type	SPL/Calendar ?	Quarterly ?	Annual ?	RMTS CC ?	Delete
Demo LEA <input type="checkbox"/>	ISD Administrator <input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- Changing a CC contact for a participant can be done two different ways:
 1. When on the participant, there is a dropdown to use. (Individual, anytime)
 2. When the Staff Pool List is open for updates, the export/import functionality can be used. (Mass change, only when SPL is open)

Shifts and Calendars

- Together Shifts and Calendars help narrow down the truest working time of Staff Pool List participants.
 - Calendar – will narrow down working and non-working days
 - Shifts – will narrow down working and non-working times



October 2018						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Informative Checklist for RMTS Staff Pool List

Informative Checklist for RMTS Staff Pool List

- Check your staff: correct cost pool? Appropriate credentials? State and local funds?
- Review your Vacancies
 - No first or last name of (Vacancy, Vacancy)**
- Review staff email addresses and names
- Review your Shifts:
 - Create more Shifts as needed
 - Assign staff to appropriate Shifts
 - No staff in inactive Shifts**
- Review your Calendar

**Due September 7
(SPL and Calendar
Due Date)**

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- Connect with IT about RMTS notifications
 - Talk to staff about the RMTS

**Recommended by
October 1, but it's
never too soon or
too late**

Before we wrap up, any questions?

Contact us

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