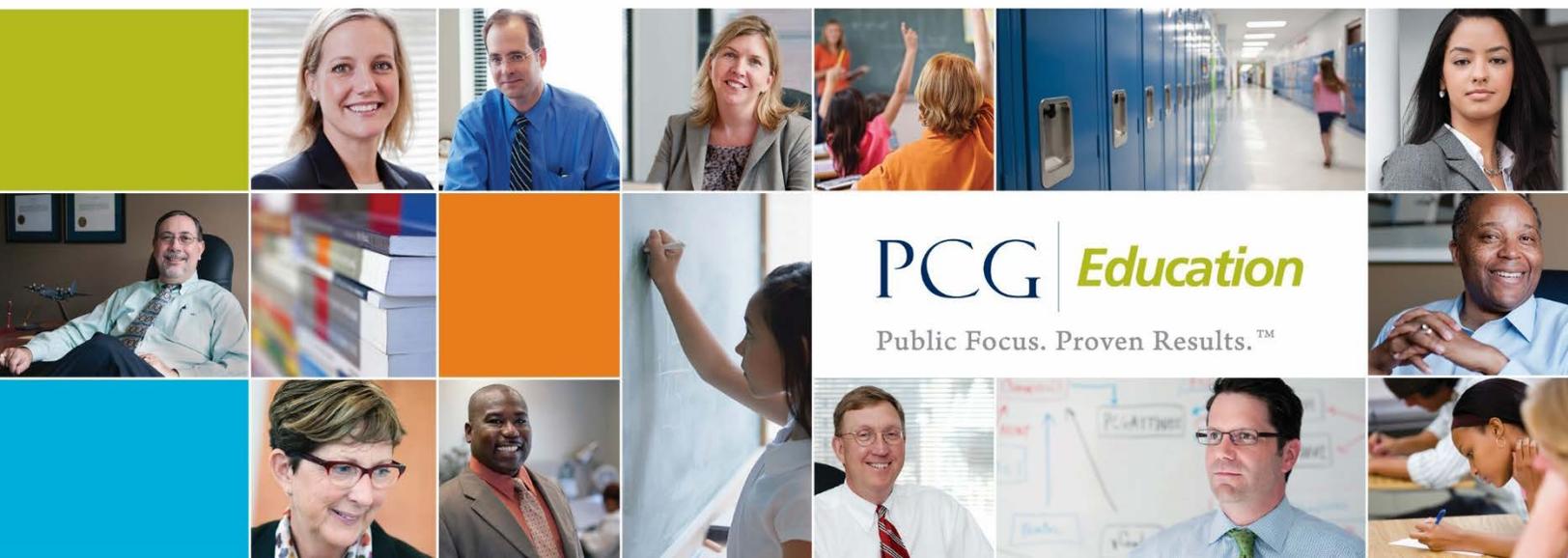


# PCG Claiming System™ Administrator User Guide for School Based ACCESS Program

June 2019





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## I. Introduction

The Pennsylvania Department of Education (PDE) and the Pennsylvania Department of Human Services (DHS) are committed to providing an efficient and effective School Based ACCESS program to document children's services cost recovery program efforts that comply with all applicable federal rules. To that end, PDE has implemented a Random Moment Time Study (RMTS) methodology to support Medicaid reimbursement for Medicaid covered services delivered by schools and local education agencies. The time study is administered by Public Consulting Group (PCG) through the PCG Claiming System™.

### *How this Manual Works*

This manual helps administrators access and oversee the PCG Claiming System™ process. The guide walks administrators through step-by-step procedures and tasks of the Random Moment Time Study as experienced by participants and LEA users.

### *Process Cycle*

The process cycle for each quarterly claim continues for almost a year. For each quarterly claim, PCG staff:

1. Collect Staff Pool Lists and school calendars
2. Implement a Random Moment Time Study
3. Collect allowable expenditures from each district or LEA
4. Submit a claim to the state
5. Review and monitor selected claims
6. Non-quarterly: Collect annual eligibility and indirect cost rates



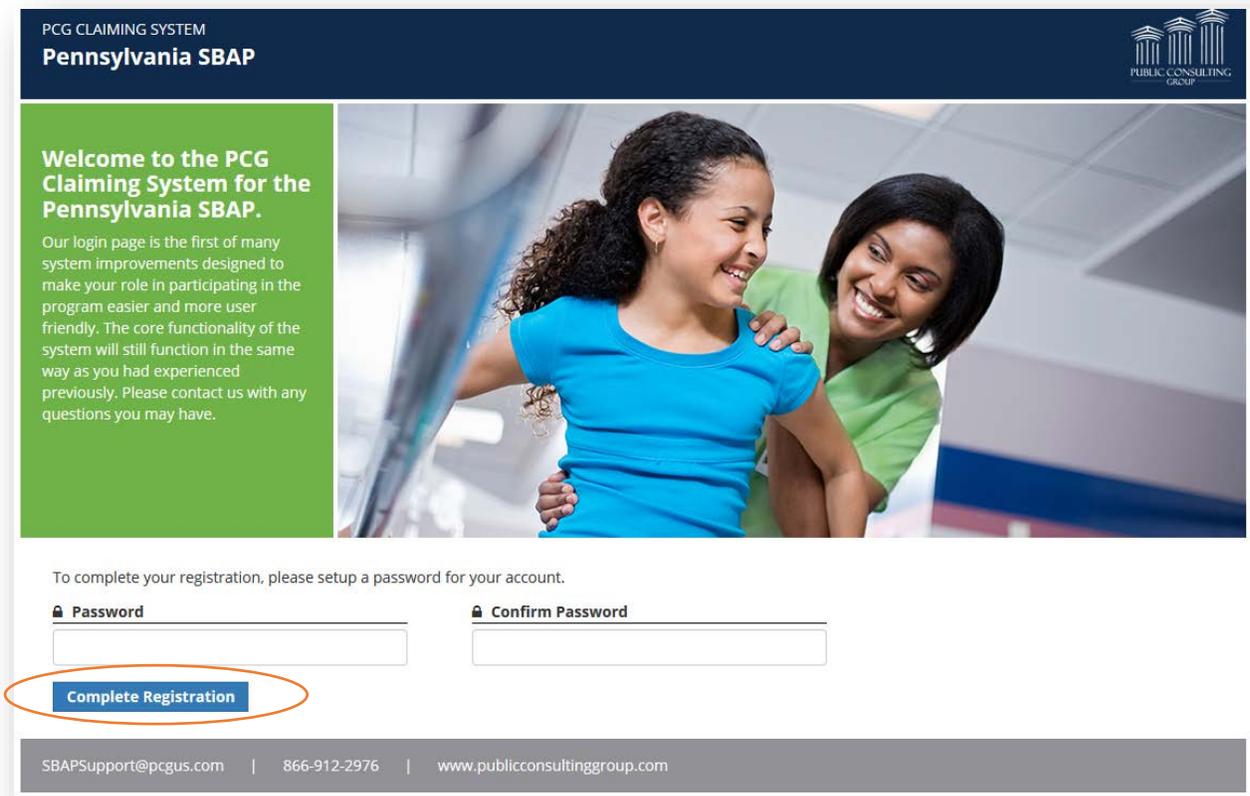
## II. Accessing the PCG Claiming System™

### *First Time Registration*

Once staff are added to the PCG Claiming system they will receive an email with the subject ‘New Account Registration’ from a ‘do not reply’ email address.

First time users need to click the web link in the email which will then bring them to the page below, so they can enter their password in the ‘Password’ and ‘Confirm Password’ fields.

Users then click the ‘Complete Registration’ button and they will be brought back to the main page to enter the email and new password to log into the site.



PCG CLAIMING SYSTEM  
**Pennsylvania SBAP**

**Welcome to the PCG Claiming System for the Pennsylvania SBAP.**

Our login page is the first of many system improvements designed to make your role in participating in the program easier and more user friendly. The core functionality of the system will still function in the same way as you had experienced previously. Please contact us with any questions you may have.

To complete your registration, please setup a password for your account.

**Password**

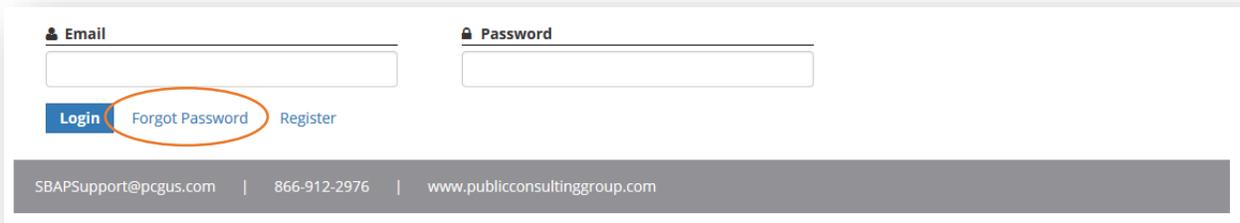
**Confirm Password**

**Complete Registration**

SBAPSupport@pcgus.com | 866-912-2976 | www.publicconsultinggroup.com

### *Resetting Passwords*

User passwords will never expire but they can be reset as needed. If a coordinator needs a new password, or has forgotten his/her login information, he/she may click on the ‘Forgot Password’ link located next to ‘Log in.’ The coordinator may also contact SBAPSupport@pcgus.com or call 866-912-2973 for assistance.

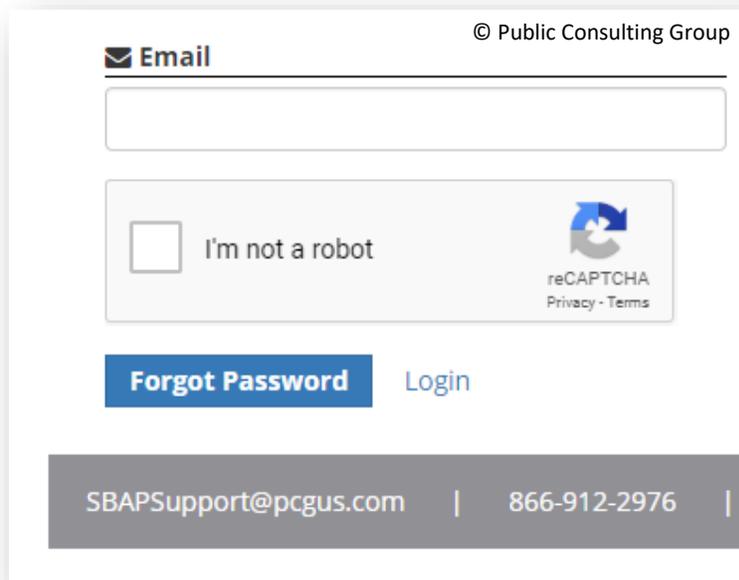


Email Password

Login Forgot Password Register

SBAPSupport@pcgus.com | 866-912-2976 | www.publicconsultinggroup.com

The user will then be sent to the screen below and will need to enter their email address that is associated with the system along with the text that is displayed in the image field and then click the 'Forgot Password' button.



© Public Consulting Group

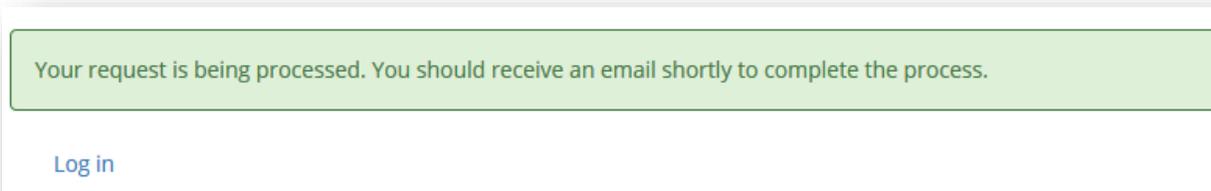
Email

I'm not a robot reCAPTCHA Privacy - Terms

Forgot Password Login

SBAPSupport@pcgus.com | 866-912-2976 |

When the user clicks the 'Forgot Password' button, the following screen displays:



Your request is being processed. You should receive an email shortly to complete the process.

Log in

The user will then be sent an email with the subject 'Reset Password Request' from a 'do not reply' email address. The email will contain a link to the page below for users to reset their password.

To change your password, please enter and confirm a new password below.

<b>🔒 Password</b>	<b>🔒 Confirm Password</b>
<input type="password"/>	<input type="password"/>
<b>Reset Password</b>	

Enter the new password in the 'Password' and 'Confirm Password' fields and click the 'Reset Password' button. The new password must contain the following:

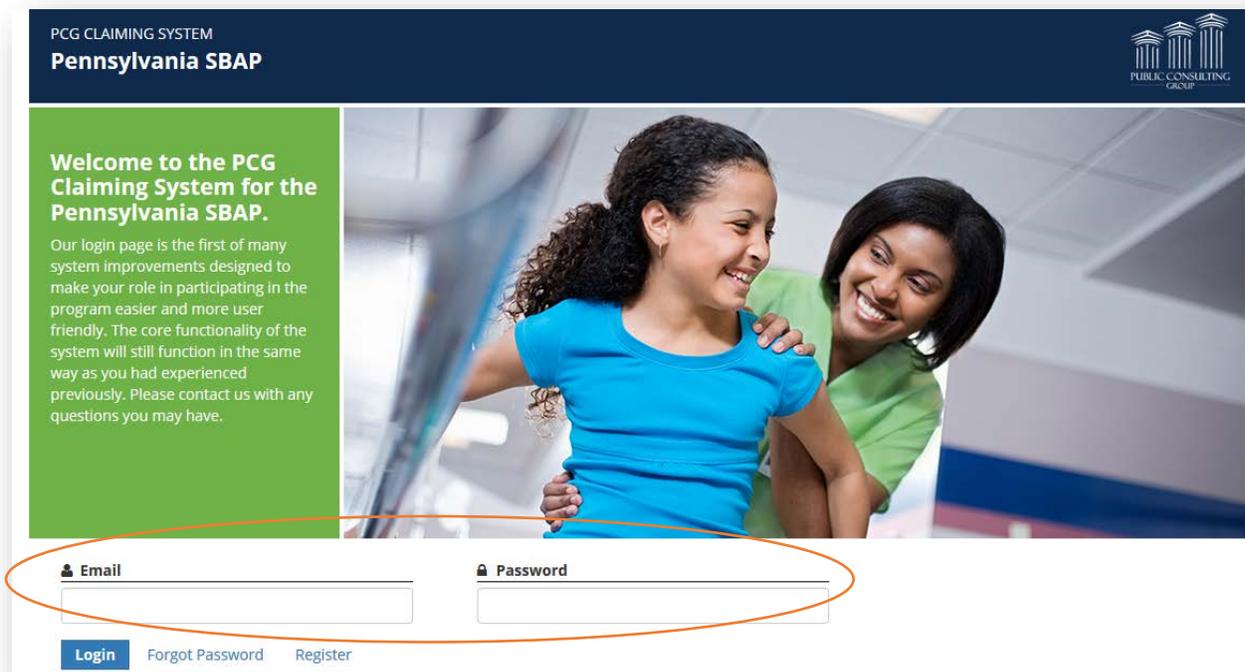
© Public Consulting Group

- At least 1 digit(s)
- At least 1 upper case character(s)
- At least 1 special character(s) !@#\$\$%^&\*(){}|~./<>?'~+.
- At least 8 characters

Users will then be brought back to the main page to enter the email and new password and log into the site.

### Registered User Login

1. To enter the PCG Claiming System website after registering, a coordinator will open an internet browser and enter: <https://claimingsystem.pcgus.com/pa>
2. Enter email and password. Be sure to enter password exactly as created, using appropriate letter cases and symbols.



PCG CLAIMING SYSTEM  
Pennsylvania SBAP

**Welcome to the PCG Claiming System for the Pennsylvania SBAP.**

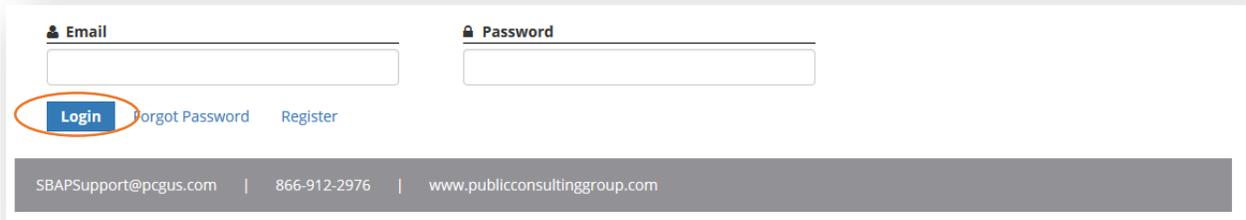
Our login page is the first of many system improvements designed to make your role in participating in the program easier and more user friendly. The core functionality of the system will still function in the same way as you had experienced previously. Please contact us with any questions you may have.

**Email**

**Password**

**Login** [Forgot Password](#) [Register](#)

3. Click the 'Log in' button after entering the email and password.



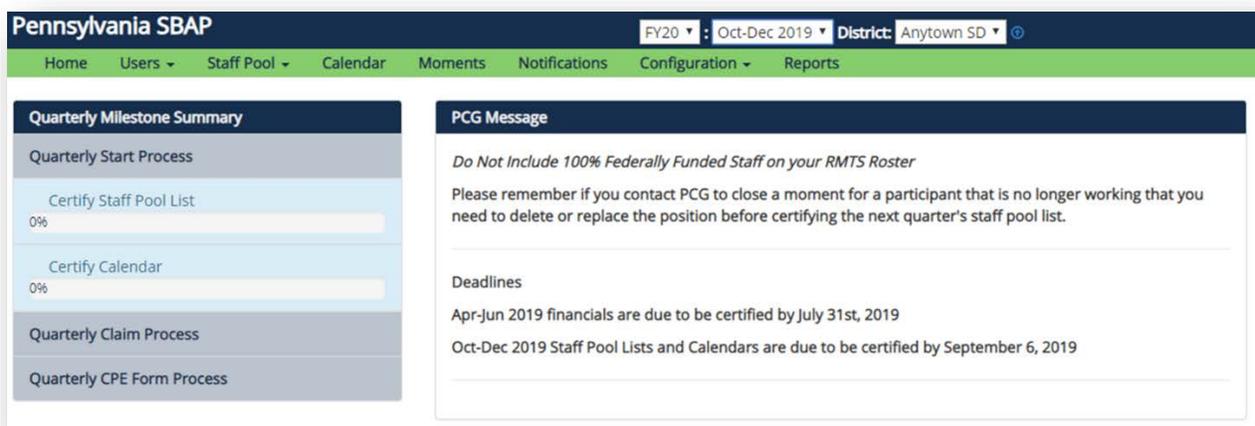
The screenshot shows a login form with two input fields: 'Email' and 'Password'. Below the 'Email' field, there are three buttons: 'Login' (highlighted with a red circle), 'Forgot Password', and 'Register'. At the bottom of the form, there is a footer with contact information: 'SBAPSupport@pcgus.com | 866-912-2976 | www.publicconsultinggroup.com'.

### III. Navigating the Home Screen

Roughly one month before each quarter begins, a new quarter will be opened in the RMTS website. General information is entered about the quarter in the RMTS website, which opens the site for SPL certification, new Calendar Loading, and Sample Generation.

Below is the home screen available after logging into the website. The home screen contains links to all of the functionality within the system, including links to Users, Staff Pool, Calendars, Moments, Configuration and Reports. Use the links to each of the sections to navigate through the system. The home screen also contains data fields known as widgets that will display information regarding quarterly milestone summaries, moment status, and resources uploaded by PCG. Click on the 'Home' link at any time to return to the home screen shown below. **The desired quarter needs to be selected by clicking on the dropdown next to the Fiscal Year dropdown at the top of the home screen to edit or monitor information pertaining to that quarter.**

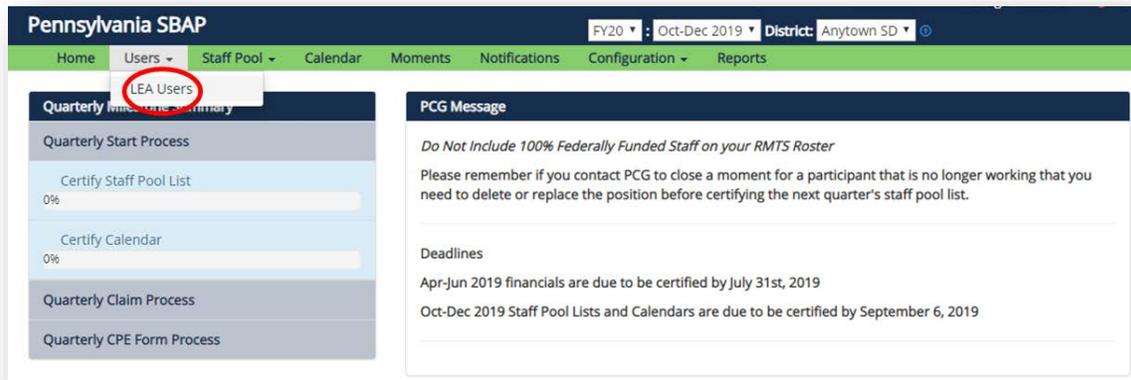
The 'Quarterly Milestone Summary' below the Home screen displays the status of the claiming process for each quarter.



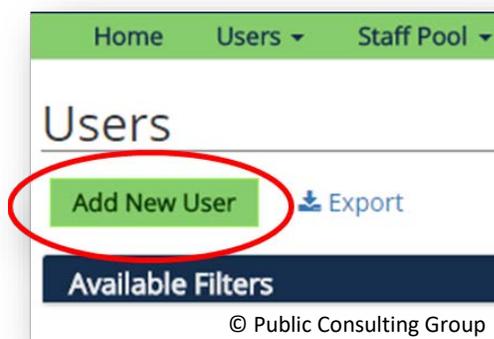
The screenshot shows the 'Pennsylvania SBAP' home screen. At the top, there is a navigation bar with 'Home', 'Users', 'Staff Pool', 'Calendar', 'Moments', 'Notifications', 'Configuration', and 'Reports'. Below the navigation bar, there are two main sections: 'Quarterly Milestone Summary' and 'PCG Message'. The 'Quarterly Milestone Summary' section shows progress bars for 'Quarterly Start Process', 'Certify Staff Pool List', 'Certify Calendar', 'Quarterly Claim Process', and 'Quarterly CPE Form Process', all at 0%. The 'PCG Message' section contains a message: 'Do Not Include 100% Federally Funded Staff on your RMTS Roster' and 'Please remember if you contact PCG to close a moment for a participant that is no longer working that you need to delete or replace the position before certifying the next quarter's staff pool list.' Below the message, there are 'Deadlines' listed: 'Apr-Jun 2019 financials are due to be certified by July 31st, 2019' and 'Oct-Dec 2019 Staff Pool Lists and Calendars are due to be certified by September 6, 2019'.

#### IV. Updating Contacts

The ‘Users’ dropdown is where Coordinators can add users (Administrative users will be able to see and update users for the LEAs, LEA users will be able to see Administrative users and update LEA users) by selecting the identifying menu (LEA Users). Coordinators will be able to edit the staff pool list by selecting ‘Staff Pool Positions’ from the dropdown menu. Coordinators can view the staff pool list for the selected quarter by clicking ‘Staff Pool.’



The Coordinators now have access to manage contacts within the site. To add users, click on ‘Staff Pool’ then ‘LEA Users.’ Select the green button ‘Add New User’ and a fill in screen will appear to add the user’s information.



Create New User

**Email:**   
(Required)

**First Name:**   
(Required)

**Middle Name:**

**Last Name:**   
(Required)

**Suffix:**

**Phone:**

[Show Details](#)

Accounts

Location	User Type	SPL/Calendar	Quarterly	Annual	RMTS CC	Delete
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Add Another?

(No changes on page)

Enter in all of the required information (in red), the location the contact will have access to (only locations the user has access to will appear), and user type. Then select the check boxes for the respective program and system information and if the user should receive RMTS late notifications for participants at the assigned location. Once all of the information has been entered click ‘Create New User’ to save the information in the site. The site will then send the user an email with instructions to access the system.

## V. Creating/Updating the Staff Pool List

The foundation of the Pennsylvania School Based ACCESS Program is the Staff Pool List (SPL). The SPL is comprised of staff members that perform Medicaid allowable outreach, referral or health service coordination activities on a regular basis. LEAs are given the opportunity to update their SPL during the following 3 quarters of each year: October – December, January – March and April – June. Having a compliant SPL directly affects the reimbursement received by participating LEAs. An accurate, up-to-date SPL allows the LEA to claim a portion of salary and benefits costs for each person during the quarterly financial reporting period.

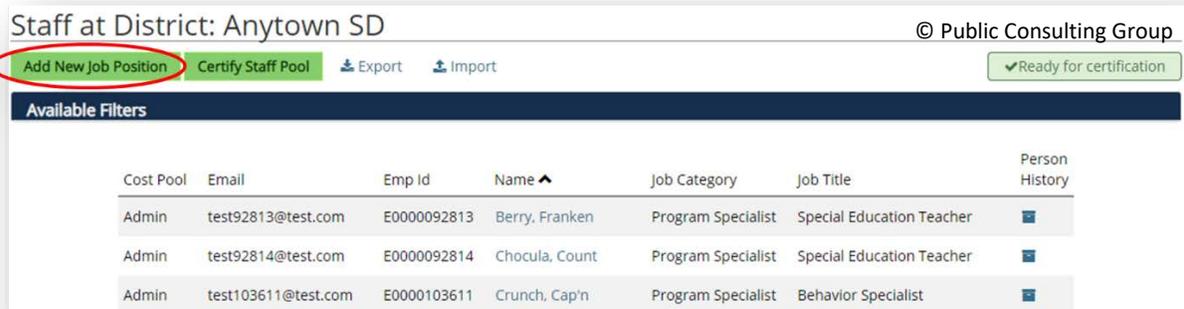
### *Staff Pool List*

To view, create, and/or update the SPL, click on the ‘Staff Pool’ link on the home screen and select ‘Staff Pool Positions.’ On the right corner, choose the appropriate district to add staff pool. The two main

components of the ‘Staff Pool’ page are the ‘Add New Job Position’ and ‘Certify Staff Pool’ buttons. The ‘Add New Job Position’ button is how users can add new job positions to their staff pool list. The ‘Certify Staff Pool’ button is the button that users click to certify and lock their staff pool in the PCG Claiming System.

On the following page is the screen that will appear after clicking on the ‘Staff Pool Positions’ link on the ‘People’ dropdown. All current active job positions included in the staff pool will appear with the following information:

- Cost Pool (Direct Service or Admin)
- Email
- Emp. ID
- Full Name
- Job Category
- Job Title
- Person History - When clicked this icon will display any name or email changes. When a name or email change is completed a log of that specific change is saved with old and new values.



Staff at District: Anytown SD © Public Consulting Group

Buttons: Add New Job Position, Certify Staff Pool, Export, Import, Ready for certification

Available Filters

Cost Pool	Email	Emp Id	Name ▲	Job Category	Job Title	Person History
Admin	test92813@test.com	E0000092813	Berry, Franken	Program Specialist	Special Education Teacher	📄
Admin	test92814@test.com	E0000092814	Chocula, Count	Program Specialist	Special Education Teacher	📄
Admin	test103611@test.com	E0000103611	Crunch, Cap'n	Program Specialist	Behavior Specialist	📄

### *Filtering the Staff Pool List*

It is possible to filter the SPL by clicking ‘Available Filters.’

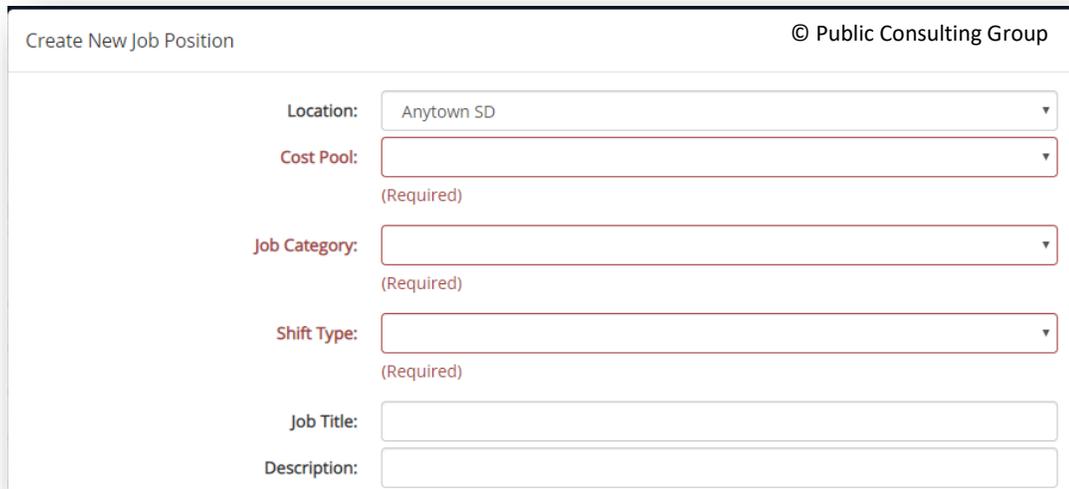
#### **Available Filters**

Select the desired cost pool, job category, email, first name, or last name, either individually or in combination with each other. Once the desired criteria have been selected, click “Filter” to display the results for all participants. To review the SPL in its entirety, leave all the search fields blank and select “Filter”. The staff that match the search criteria will display.

The staff members that meet the search criteria selected will be displayed.

### ***Adding a New Job Position***

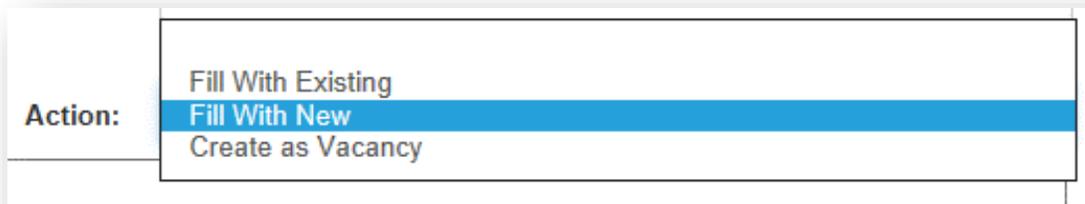
1. From the ‘Staff Pool Positions’ screen, click on the ‘Add New Job Position’ button located on the upper left of the screen to add a new job position. The job position is created first and then a staff person assigned to it.
2. The required fields below will appear:
  - Cost Pool: A drop down menu with the cost pools allowed.
  - Job Category: A drop down menu with job categories allowed in that cost pool.
  - Shift Type: A drop down menu with all shifts listed created by the LEA.



The screenshot shows a web form titled "Create New Job Position" with a copyright notice for Public Consulting Group. The form contains several input fields:
 

- Location:** A dropdown menu currently showing "Anytown SD".
- Cost Pool:** An empty dropdown menu with a red border and the label "(Required)" below it.
- Job Category:** An empty dropdown menu with a red border and the label "(Required)" below it.
- Shift Type:** An empty dropdown menu with a red border and the label "(Required)" below it.
- Job Title:** A text input field.
- Description:** A text input field.

3. Enter the required information and then select the action. When adding a new staff person, select the action, ‘Fill With New’ from the drop down.



The screenshot shows a dropdown menu for the "Action" field. The menu is open, displaying three options:
 

- Fill With Existing
- Fill With New** (highlighted with a blue background)
- Create as Vacancy

4. Complete the new staff person’s information by entering: (\* = Required field)
  - Start Date (will default to the first day of the quarter): Enter the employment start date.
  - \*Employment Type: A drop down menu to select Salaried or Contracted.
  - \*Email: The participant must have a working email address.
  - \*First Name

- Middle Name (optional)
- \*Last Name
- Suffix (optional)
- Phone
- Email CC person: select from the dropdown the contact that will receive this participant's RMTS late notifications

Create new staff: © Public Consulting Group

Start Date:

End Date:

Employment Type:  (Required)

Email:  (Required)

No Email

Employee ID:

First Name:  (Required)

Middle Name:

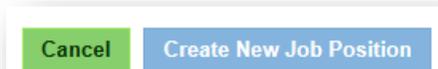
Last Name:  (Required)

Suffix:

Phone:

Email CC Person:

5. Click 'Create New Job Position' or cancel to abort new job position and return to the SPL.



### ***Adding a New Vacancy Position***

1. From the 'Staff Pool Positions' screen, click on the 'Add New Job Position' button located on the upper left of the screen to add a new Job Position. The job position is created first and then a staff person assigned to it.

Staff at District: Anytown SD

Add New Job Position

Certify Staff Pool

Export

Import

Ready for certification

Available Filters

2. The required fields below will appear:

- Cost Pool: A drop down menu with the cost pools allowed.
- Job Category: A drop down menu with job categories allowed in that cost pool.
- Shift Type: A drop down menu with all shifts listed created by the LEA.
- Job Title: Job title used by the district to describe the position. Note: This field can be used to enter further identifying information such as school building, room number, etc.

Create New Job Position © Public Consulting Group

Location: Anytown SD

Cost Pool:  (Required)

Job Category:  (Required)

Shift Type:  (Required)

Job Position Id:

Job Title:

Description:

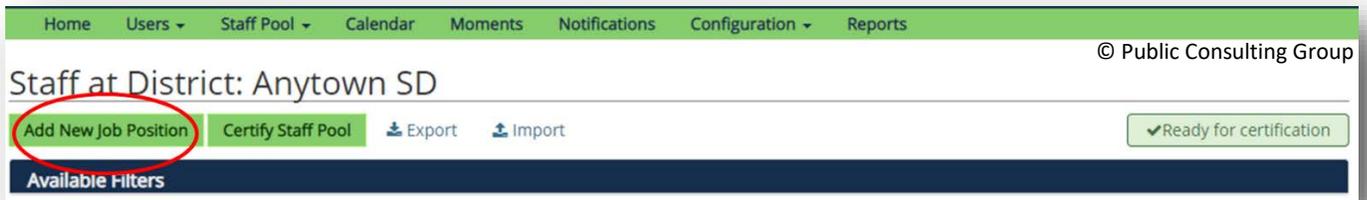
4. Click 'Create New Job Position' or cancel to abort new job position and return to the SPL.

Cancel

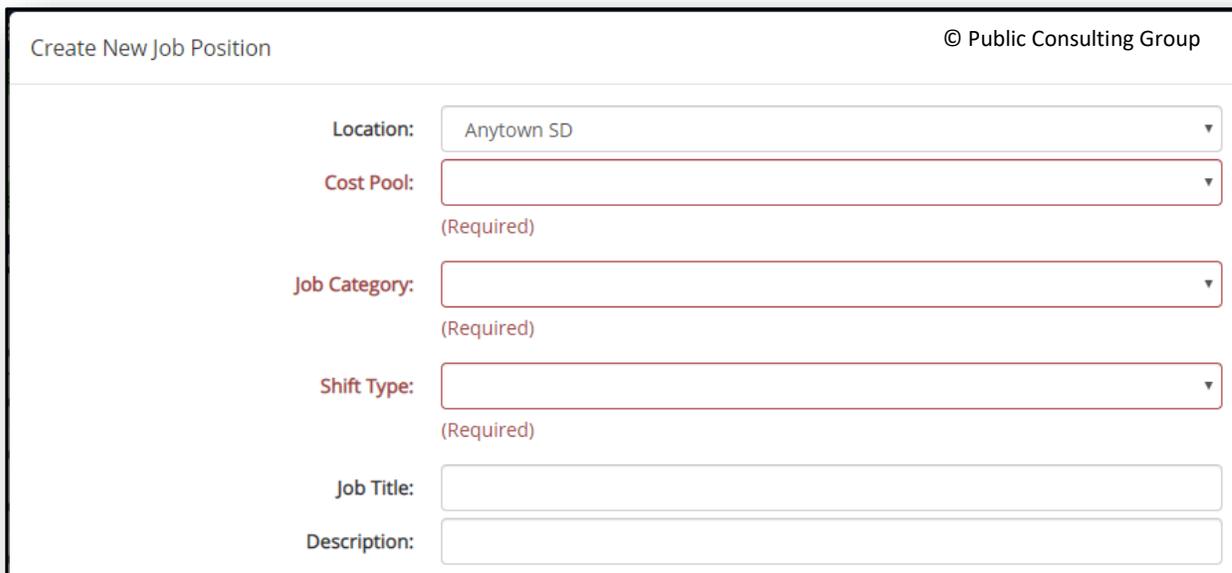
Create New Job Position

### *Filling a New Position with an Existing Staff Member*

1. From the 'Staff Pool Positions' screen, click on the 'Add New Job Position' button located on the upper left of the screen to add a new Job Position. The job position is created first and then a staff person assigned to it.



2. The required fields below will appear:
  - Cost Pool: A drop down menu with the cost pools allowed.
  - Job Category: A drop down menu with job categories allowed in that cost pool.
  - Shift Type: A drop down menu with all shifts listed created by the LEA.
  - Job Title: Job title used by the district to describe the position.



The screenshot shows the 'Create New Job Position' form. The form is titled 'Create New Job Position' and includes the following fields:

- Location:** A dropdown menu with 'Anytown SD' selected.
- Cost Pool:** A dropdown menu with a red border and '(Required)' text below it.
- Job Category:** A dropdown menu with a red border and '(Required)' text below it.
- Shift Type:** A dropdown menu with a red border and '(Required)' text below it.
- Job Title:** A text input field.
- Description:** A text input field.

3. Enter the required information and then select the action. When selecting an existing staff, select the action 'Fill With Existing.' Note: Only staff that are inactive and not assigned to another position can be selected to fill a position. If changing a staff person from one cost pool to another, delete the position in the current cost pool, then add a position in the correct cost pool and select 'Fill With Existing' to choose the existing staff person.

Action:

- Fill With Existing
- Fill With New
- Create as Vacancy

- Search for the staff person by entering specific criteria in the search fields

Search for staff:

Email:

Employee ID:

First Name:

Last Name:

© Public Consulting Group

All staff, both inactive and active, will appear in the search results based on the criteria selected. ‘Yes’ under the column header ‘inactive’ means the participant is inactive and can be selected to fill the position. ‘No’ in the ‘inactive’ column means the staff is active in the district. Only a participant that is not assigned to a current position (having a yes in the column, ‘inactive’) can be selected. Select the Back button to redo search criteria or to return to the adding participant screen.

Search results:

Location	Email	Employee ID	Name	Inactive	Fill
	test5964@test.com	431	Dwarf, Sleepy	Yes	<input type="button" value="Fill"/>

© Public Consulting Group

- Click the ‘Fill’ button once the desired staff is located to populate the job position. Enter the start date that the existing staff person is beginning the new position. The system will default to the first day of the quarter.
- Then select ‘Create New Job Position’ to save it.

Fill with staff:

Employment Type: District Payroll

Start Date: 07/01/2017

End Date: mm/dd/yyyy

Email: test5964@test.com

Employee ID: 431

Name: Dwarf, Sleepy

Email CC Person: (none)

© Public Consulting Group

Add Another?

Cancel

Create New Job Position

### Deleting a Staff Person and a Position

1. Select the link on the name of the staff person to delete. The 'Edit Job Position' window will open. Go to the Action menu and select Delete.

Edit Job Position 4 / 8

© Public Consulting Group

Location: Anytown SD

Cost Pool: Admin

Job Category: Administrator

Shift Type: Full Time

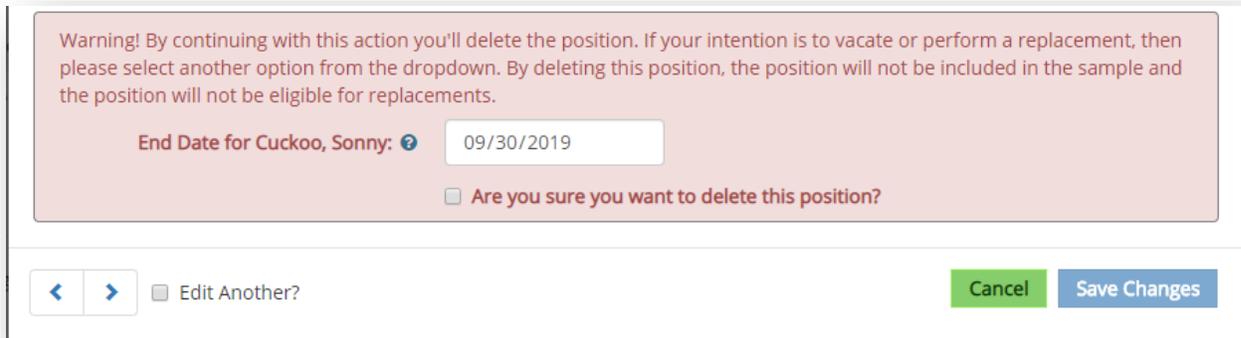
Job Title: Special Education Coordinator

Description:

Employment Status	Employee ID	Email	Name	Start Date	End Date	Delete
District Payroll	E0000092816	test92816@test.com	Cuckoo, Sonny	10/01/2017		✕

Action: Delete

2. The following Warning message will appear.



Warning! By continuing with this action you'll delete the position. If your intention is to vacate or perform a replacement, then please select another option from the dropdown. By deleting this position, the position will not be included in the sample and the position will not be eligible for replacements.

End Date for Cuckoo, Sonny:

Are you sure you want to delete this position?

Edit Another? Cancel Save Changes

The end date from the previous quarter will display. Enter the date the staff person left the position. Also, click the checkbox indicating assurance of the deletion.

3. Select “Save Changes” to complete the deletion.

### ***Reactivating a Job Position***

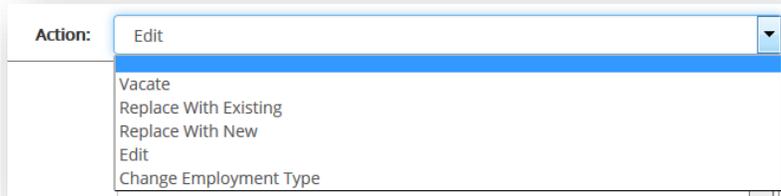
If a job position returns to the district that was at one time inactive, the Coordinator will need to create a new job position and fill it with a participant that is active. This is the same process as the ‘Adding a New Job Position’ process that was described earlier in this guide. For example, in one quarter there were three Speech Therapists and then the following quarter only two, in order to add one back this quarter, a new position must be created.

### ***Allowable Actions during a Quarter***

Once the quarter has begun, the ‘Action’ menu allows users to make the position a vacancy (if the participant has left the position), or replace the participant with another staff (existing or new) during the quarter. This will allow users to track specific dates that participants were in the position for financial claiming and allow new participants to be notified of moments that occurred while they are in the position.

### ***Replacing a Staff Person***

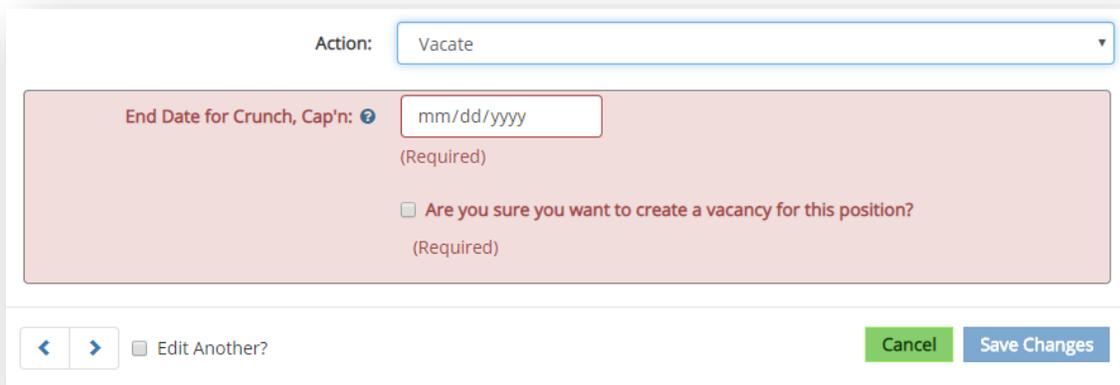
1. Select the link on the name of the staff person to replace.
2. Scroll to the Action Dropdown box to make a selection:
  - a. Vacate
  - b. Replace with Existing
  - c. Replace with New
  - d. Edit
  - e. Change Employment Type



The screenshot shows a dropdown menu with the following options: Edit (selected), Vacate, Replace With Existing, Replace With New, Edit, and Change Employment Type.

**a. Vacate**

Use this if a staff person has left a position and there is no replacement staff. This feature can be used during the quarter as well as at the beginning. Enter the date the staff person vacated the position. Enter any other identifying information about the position in the job title field such as school building, room number, etc. Click the check box indicating assurance of creating a vacancy and select ‘Save Changes.’

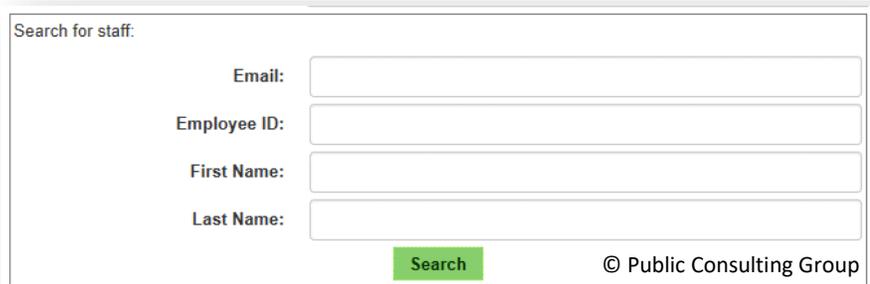


The screenshot shows the 'Vacate' form with the following fields and options:

- Action: Vacate
- End Date for Crunch, Cap'n:  (Required)
- Are you sure you want to create a vacancy for this position? (Required)
- Buttons: < > Edit Another? Cancel Save Changes

**b. Replace with Existing**

Search for the staff person by entering specific criteria in the search fields



The screenshot shows the 'Search for staff' form with the following fields and options:

- Search for staff:
- Email:
- Employee ID:
- First Name:
- Last Name:
- Buttons: Search © Public Consulting Group

All staff, both inactive and active, will appear in the search results based on the criteria selected. ‘Yes’ under the column header ‘inactive’ means the participant is inactive and can be selected to fill

the position. 'No' in the 'inactive' column means the staff is active in the district. Only a participant that is not assigned to a current position (having a yes in the column 'inactive') can be selected. Select the Back button to redo search criteria or to return to the adding participant screen.

Search results:

Location	Email	Employee ID	Name	Inactive	Fill
	test5964@test.com	431	Dwarf, Sleepy	Yes	Fill

[Back](#)

© Public Consulting Group

Click the 'Fill' button once the desired staff is located to populate the job position. Enter the start date that the existing staff person is beginning the new position. The system will default to the first day of the quarter. Then select 'Create New Job Position' to save it.

Fill with staff:

**Employment Type:** District Payroll

**Start Date:** 07/01/2017

**End Date:** mm/dd/yyyy

**Email:** test5964@test.com

**Employee ID:** 431

**Name:** Dwarf, Sleepy

**Email CC Person:** (none)

© Public Consulting Group

Add Another? [Cancel](#) [Create New Job Position](#)

**c. Replace with New**

Complete the new staff person information by entering:

- Start Date (will default to the first day of the quarter): Enter the employment start date.
- Email address
- First Name
- Middle Name (optional)

- Last Name
- Suffix (optional)
- Phone (optional but recommended)
- Email CC person: select from the dropdown the contact that will receive this participant's RMTS late notifications

Create new staff: © Public Consulting Group

End Date for Chocula, Count:

Start Date:

End Date:

Employment Type:  (Required)

Email:  (Required)

No Email

Employee ID:

First Name:  (Required)

Middle Name:

Last Name:  (Required)

Suffix:

Phone:

Email CC Person:

Click 'Save Changes' or cancel to abort new job position and return to the SPL

### ***Long-Term Subs***

A long-term sub must meet the long-term sub criteria. The sub must have at a minimum, the same qualifications/licenses that the staff person has and be in the position for at least 30 days during the quarter. All moments that occur during the quarter when the sub is in the position, will be sent to the sub. There is no need to further contact PCG via email unless there are questions.

1. Select the link of the name of the participant that is on leave.
2. Follow the steps above for Replace with New or Replace with Existing.

### ***Editing a Staff Person***

If information needs to be updated for a staff person, such as email address, name, or job title, follow the following steps:

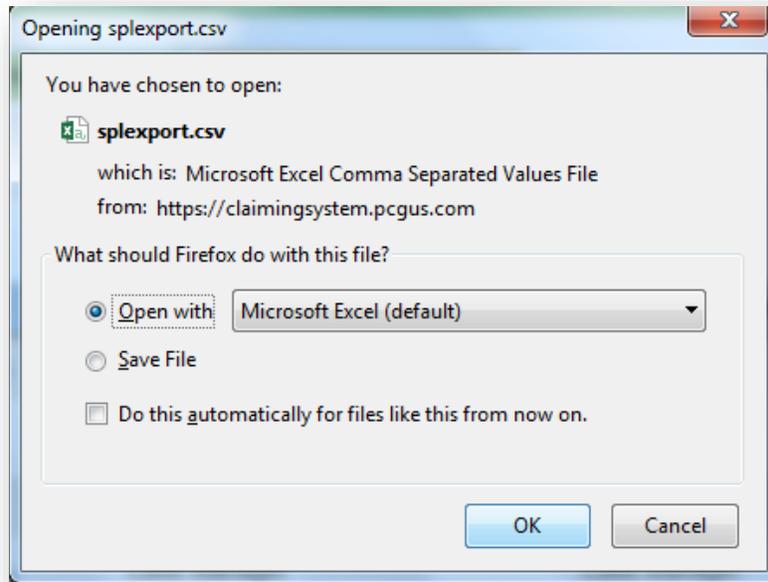
1. From the 'Staff Pool screen,' job position information may be edited by selecting the link on the desired participant's name.
2. Make all necessary modifications to the individual job position's screen by clicking in the text boxes or by using the drop-down menus. Users are able to make updates to the job position's:
  - Employee Type
  - End Date
  - Employee ID
  - Middle Name
  - Suffix
  - Phone
  - Email CC Person
3. To change the email or last name, place a checkmark on the section below the Action dropdown and above the Employment Type. Once checked, those 2 sections will open up so you can make edits.
4. Once all the necessary changes have been made, click the 'Save Changes' button at the bottom of the screen to save the updated information.

### ***Exporting and importing the SPL***

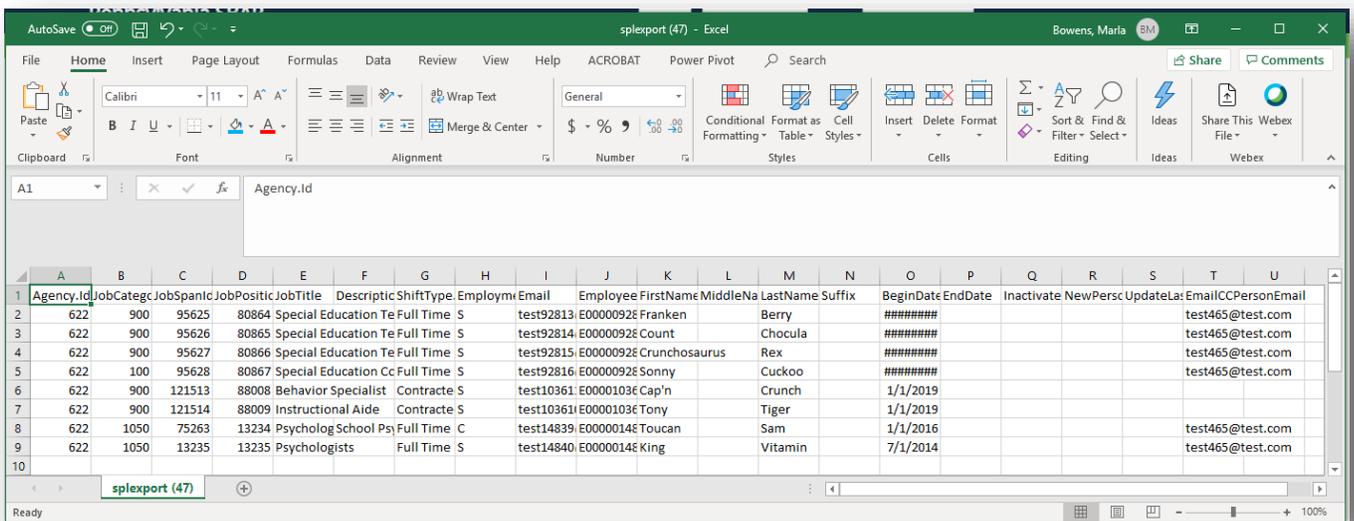
As an additional option, staff can export the SPL, make updates and then import the file into the site. To export the file go to the 'People' tab and choose 'Staff Pool Positions,' you will see 'Export' on the top of the screen.



A pop up box will appear, click 'OK.'



This will allow the file to open, it will open in a .CSV file but it is important to note that you will need to save this file in Excel format.



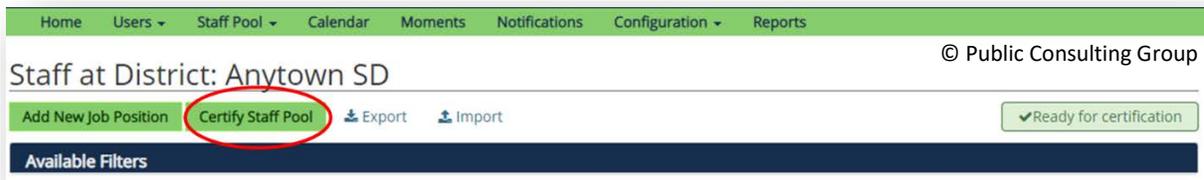
Agency.Id	JobCategory	JobSpanId	JobPositic	JobTitle	Descriptive	ShiftType	Employment	Email	Employee	FirstName	MiddleNa	LastName	Suffix	BeginDate	EndDate	Inactivate	NewPersc	UpdateLa	EmailCC	PersonEmail
622	900	95625	80864	Special Education Te	Full Time	S	test92813	E00000928	Franken		Berry		#####							test465@test.com
622	900	95626	80865	Special Education Te	Full Time	S	test92814	E00000928	Count		Chocula		#####							test465@test.com
622	900	95627	80866	Special Education Te	Full Time	S	test92815	E00000928	Crunchosaurus		Rex		#####							test465@test.com
622	100	95628	80867	Special Education Cc	Full Time	S	test92816	E00000928	Sonny		Cuckoo		#####							test465@test.com
622	900	121513	88008	Behavior Specialist	Contracte	S	test10361	E00001036	Cap'n		Crunch		1/1/2019							
622	900	121514	88009	Instructional Aide	Contracte	S	test10361	E00001036	Tony		Tiger		1/1/2019							
622	1050	75263	13234	PsychologSchool Psy	Full Time	C	test14839	E00000148	Toucan		Sam		1/1/2016							test465@test.com
622	1050	13235	13235	Psychologists	Full Time	S	test14840	E00000148	King		Vitamin		7/1/2014							test465@test.com

Edits and vacancies must be completed in the system and cannot be completed through the import. If updating via import is preferred, please contact PCG to assist you with matching all required fields.

## VI. Certifying the Staff Pool List

After all updates have been completed, the LEA must certify the Staff Pool List. Before certifying the SPL, please be sure the list is accurate and complete. **Please note that each LEA must be certified in order for the staff pool list to be included in the time study for the quarter. An Administrator certifying just the State and not each LEA will exclude any LEAs not certified.**

1. Click on the ‘Staff Pool Positions’ link from the ‘People’ dropdown on the ‘Home’ screen.
2. The staff pool will display. Select the ‘Certify Staff Pool’ box to certify the staff pool.



The system will display the message that the list has been certified successfully. The final step is for the State to review the SPLs of all the LEAs and click Certify Staff Pool List.

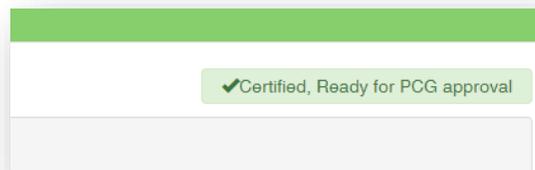
### *Administrator View of Staff Pool List*

Administrators can view the Staff Pool List for all LEAs by selecting ‘Staff Pool Summary’ from the ‘Staff Pool’ menu. The list shows all participants by LEA and can be exported for easy viewing. Though edits must be made at the LEA level needing the change, the list is a quick way for comparisons to be made for the whole State.

### *Administrator Certification of Staff Pool List*

Administrators must contact PCG if they need the LEA to make updates once the district has certified their Staff Pool List. When PCG has unlocked the staff pool, edits can be made to the LEA’s staff pool list.

Once all edits are made, the staff pool list must be certified again. Then the Administrator should certify the whole staff pool list. This will indicate to PCG that the State’s staff pool list is finalized and ready for PCG review.



An Administrator can quickly view which of their LEAs have certified their SPLs by selecting the arrow in the dropdown menu next to the State name while in the ‘Staff Pool Participants’ section in the ‘Staff Pool’ tab.

Pennsylvania SBAP

 FY20 : Oct-Dec 2019 District: Anytown SD

Home Users Staff Pool Calendar Moments Notifications Configuration Reports

 Certified, Ready for PCG approval  
Anytown SD

## Staff at District: Anytown SD

[Export](#)

Certification Date: 06/28/2019 3:29 PM

Certification User: Bowens, Marla (mbowens@pcgus.com)

Available Filters

Cost Pool	Email	Emp Id	Name ▲	Job Category	Job Title	Person History
Admin	test92813@test.com	E0000092813	Berry, Franken	Program Specialist	Special Education Teacher	
Admin	test92814@test.com	E0000092814	Chocula, Count	Program Specialist	Special Education Teacher	
Admin	test103611@test.com	E0000103611	Crunch, Cap'n	Program Specialist	Behavior Specialist	
Admin	test92816@test.com	E0000092816	Cuckoo, Sonny	Administrator	Special Education Coordinator	
Admin	test92815@test.com	E0000092815	Rex, Crunchosaurus	Program Specialist	Special Education Teacher	
DS	test14839@test.com	E0000014839	Sam, Toucan	Psychologists	Psychologists	
Admin	test103610@test.com	E0000103610	Tiger, Tony	Program Specialist	Instructional Aide	
DS	test14840@test.com ✓	E0000014840	Vitamin, King	Psychologists	Psychologists	

( 8 Job Positions ) © Public Consulting Group

The list of LEAs will then display in two sections:

- Ready for certification: This group of LEAs has not certified yet.
- Certified, Ready for PCG approval: This group of LEAs has certified their SPL.

## VII. Completing Calendars

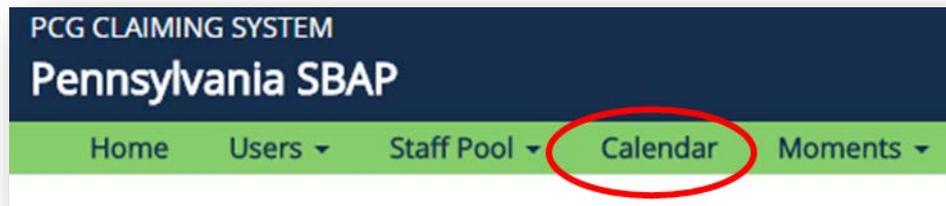
Staff included on the SPL are eligible to receive Random Moment Time Study (RMTS) surveys throughout each quarter. Because each LEA has a different schedule, we need a way to ensure that staff members have a high likelihood of receiving a moment during work hours. To do this, we collect calendar information for each participating LEA. In August, LEAs are notified that their SPL is open to be updated for the October-December quarter. Roughly one month before each quarter begins, non-work days must

be selected on the calendar (e.g. enter non-work days in December for January – March quarter) and the calendar must be certified. The RMTS system uses this information when assigning moments to ensure they are distributed during working hours. This is important because for a sample to be valid, a certain number of working moments need to be returned.

The calendar collection process is much simpler in the new system. Instead of collecting hundreds of Excel documents, proofing them, aggregating them, importing them into the system, and then manually entering in start/end times, the LEA Admin enters the information directly into the system.

LEAs enter their non-work days directly into the PCG Claiming system to prevent staff from being selected for a moment on days that they do not work. **Each LEA must certify the calendar before each quarter in order for the non-working days to be excluded from being selected for moments.**

The ‘Calendar’ dropdown is where Coordinators update their calendar information.



***To enter staff days off:***

1. Click the ‘Calendar’ link at the top of the home page.
2. Holiday/Non-Work Day is the only selection that indicates non-work days for staff. The Teacher In-service Work Day and Early Release Day—Optional selections can both be used if the LEA wishes to indicate them on the calendar, but they will not be days that are removed from the time study. Select Holiday/Non-Work Day and then click on the days on the calendar that correspond to the days off for the district. If a day is selected in error, simply click it again to refresh.

## Calendar: Anytown SD

© Public Consulting Group

Save Changes **Reset** **Certify Calendar** [Export Days Off](#)

Ready for certification



### Additional Information:

- The calendar is ready to be certified. Please make sure all holidays for the quarter have been indicated, saved, and certified.

Calendar Options:  Show Certified Calendar?  Show Number of Moments

Moment Counts:  Moments  Overdue Moments  Moment Notices  Overdue Follow-ups

Holiday/Non-Work Day  Early Release Day  Teacher Inservice Work Day

April 2019						
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				

May 2019						
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	

June 2019						
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						

- Click 'Save Changes' to lock in the non-work days and then click 'certify calendar.' Contact PCG to make changes to the calendar if certification is selected prematurely. Only PCG can unlock a district calendar.

Save Changes	<b>Reset</b>	<b>Certify Calendar</b>
--------------	--------------	-------------------------

Once a calendar is certified, it locks and the Unplanned Closure selection is displayed. Use this throughout the quarter to identify any days off that the district has to schedule unexpectedly. PCG will use this information to assist in completing moments.

## Calendar: Anytown SD

Save Changes **Reset** Export Calendar Export Days Off ✔ Certified, Ready for PCG approval

**i** Additional Information:

- The calendar has been locked. It will be unlocked once the sample is finalized.

Calendar Options:  Show Certified Calendar?  Show Number of Moments

Moment Counts:  Moments  Overdue Moments  Moment Notices  Overdue Follow-ups

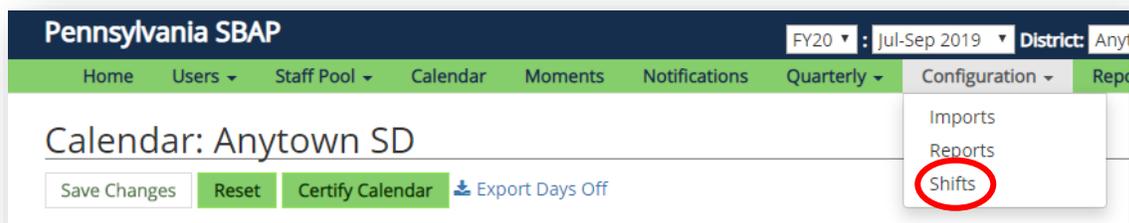
Unplanned Closure © Public Consulting Group

## VIII. Entering Shifts

PCG recognizes that not every LEA or school on the staff pool list begins and ends their work day at the same time. The creation of shifts in the new system allows for differences in schedules per LEA or school to be created within each LEA to capture the truest working time for each participant. An LEA can create multiple shifts for staff that have set schedules. If an LEA has a part time staff person, but their schedule is flexible, that participant must be assigned the full-time shift. At a minimum, an LEA must have a full-time shift that encompasses the contracted work time. Other examples of shifts the LEA may set are:

- Shift for high schools
- Shift for elementary schools
- Shift for administrators' contract time
- Shift for a part time staff that have a set schedule (M-F 8-12, etc.).

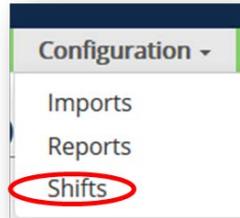
The 'Configuration' dropdown is where Coordinators update their shifts.



The screenshot shows the Pennsylvania SBAP system interface. At the top, there are navigation tabs: Home, Users, Staff Pool, Calendar, Moments, Notifications, Quarterly, Configuration, and Reports. The 'Configuration' dropdown menu is open, showing options: Imports, Reports, and Shifts. The 'Shifts' option is circled in red. Below the navigation tabs, the page title is 'Calendar: Anytown SD'. There are buttons for 'Save Changes', 'Reset', 'Certify Calendar', and 'Export Days Off'.

To enter shifts:

1. Go to the 'Configuration' drop down on the home screen and select 'Shift.'



2. Click on 'Add New Shift.'



3. Type in a Name for the shift being created. Naming conventions should be easy to identify so that a correct shift can be selected for a staff person. Naming convention examples:
  - M-F 8-12
  - T, W, TH 8-3
  - Full Time HS 8-3:30
  - Full Time Toyon Elementary School

Create New Shift © Public Consulting Group

Shift:

Position:

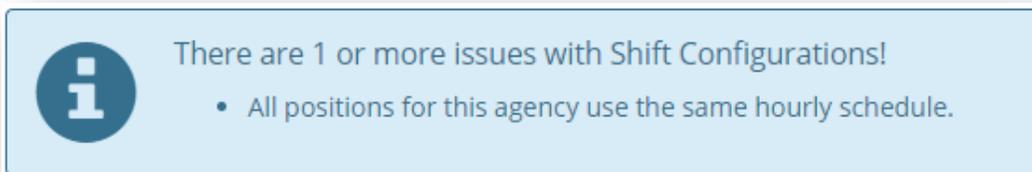
Day of week	Begin Time	Duration	Delete
Monday <input type="button" value="v"/>	11:00 AM	2h	<input type="button" value="x"/>
<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="x"/>

4. The Position is there to indicate the order you want your shifts to appear in the drop down for your staff pool (Positions).
5. Choose the day of the week for your shift from the drop down. Each day must be added to the shift separately. If the shift is 2 or more days, steps 5-7 will be repeated until the full shift has been identified.

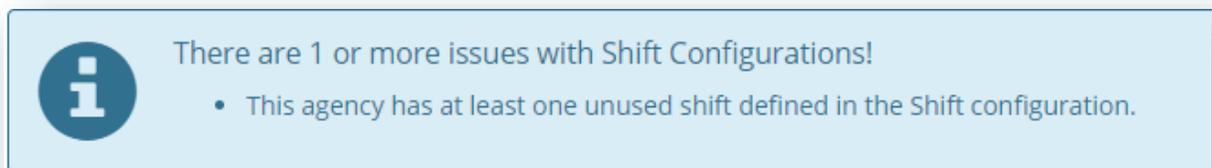
6. Enter the starting time in the following format 8:00 AM/PM or military time (13:00 = 1:00 PM).  
**Note: LEAs will not enter the end time.**
7. Enter the duration of the shift in the following format #h #m (substituting # for the actual duration of hours and minutes) – This is not the ending time, but instead is the length of the shift. The system will determine the ending time based on the start time entered in step 6 and the duration of the shift entered in this step.
8. Repeat steps 5 – 7 for each of the days which are associated with this shift and click ‘Create New Shift’ to save it in the system.
9. The shift will then be saved in the system and can be assigned to job positions.
10. If only one full-time shift is used the start and end times should cover all the time staff on the staff pool list are required to work on a typical school day.
11. If multiple shifts are used, each shift should cover the entire workday and not just timeframes within the workday.

**Please see important UPDATES for adding SHIFTS for the Spring 2019 Quarter**

1. Edit checks have been added to warn that additional review may be needed for the following:
  - a. All staff pool positions have the same shift/same hourly schedule.



- b. A shift is created but positions are not assigned to it.



- c. All staff pool positions have the same shift/hourly schedule and a shift is created but positions are not assigned to it.



There are 1 or more issues with Shift Configurations!

- All positions for this agency use the same hourly schedule.
- This agency has at least one unused shift defined in the Shift configuration.

2. Please review any shift warnings that appear. Make appropriate changes or verify and confirm.
  - a. If attempting to certify the SPL with only one shift or with at least one shift that has been created but not assigned to any position, the below Confirmation box will appear.

Please Confirm

You have only one shift, all of your shifts have the same start time and duration, or you have an unused shift configured. Please verify that the shift covers the entire time that staff are required to work on a standard day within your district.

Cancel Confirm

- b. Please make appropriate changes or verify the shifts entered cover all the time staff on the staff pool list are required to work and are paid on a typical day.
- c. If multiple shifts are used, each shift should cover the entire work day the position is paid during the workday.
- d. After reviewing your shifts and confirming they cover all the times the position works and is paid or making the appropriate changes, please proceed in certifying the SPL by selecting the confirm box.

Please Confirm

By clicking this button, I certify that I have provided all requested information, and that the information I have provided is accurate and complete. Specifically, I certify that calendar and shift information is accurate and complete, and that the dates and times entered in the system cover ALL time that any staff listed on the Staff Pool list are scheduled to work (from the earliest start time each day to the latest end time each day). I understand this information is used to determine federal cost reimbursement, and is subject to audit. I also understand that if I have questions, I can contact PCG.

Cancel

Confirm

- e. After clicking confirm, the LEA will be able to certify the SPL. If the LEA certified the SPL without assigning additional shifts to positions the below message will display after certification and for the remainder of the quarter.

