Medicaid Administrative Claiming
Random Moment Time Study
Coordinator’s Instruction Guide to Participant Management

Federally Recognized Indian Tribes

Effective August, 2016
Participant Management for RMTS

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A. Participant Management: Overview and Purpose

On a quarterly basis, prior to the start of the Random Moment Time Study (RMTS), each Tribe must update information in the RMTS system that will identify individuals who will be participating in the RMTS in the upcoming quarter.

Part of this process is to identify a work schedule for each RMTS participant. Please see the RMTS Calendar Instruction Guide for the details of that process. Information for all RMTS participants must be completed in the RMTS system no later than the 10th of the month preceding the start of each quarter.

<table>
<thead>
<tr>
<th>Time Study Quarter:</th>
<th>Calendar Entry/Edit Deadline:</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 1 – September 30</td>
<td>June 10</td>
</tr>
<tr>
<td>October 1 – December 31</td>
<td>September 10</td>
</tr>
<tr>
<td>January 1 – March 31</td>
<td>December 10</td>
</tr>
<tr>
<td>April 1 – June 30</td>
<td>March 10</td>
</tr>
</tbody>
</table>
B. Logging on to the system

1. Participant Management information is entered into the RMTS section of the system.

   https://cbe.chcf-umms.org/RMTSAdmin

   Login with your User ID and password

   ![Login with User ID and Password]

   Click [here](#) to read Non-UMMS User Data Access Agreement.

   ![Contact Us]

   If you are logged into the RMTS system, select ‘RMTS Admin’ from the left-hand navigation menu to transfer to Participant Management.

   ![Participant Management]
C. Participant Management

The My Participants grid for the Random Moment Time Study (RMTS) identifies individuals from your Tribe that you have named to participate in the RMTS.

From this screen, you will be able to:

- Add new participants
- Update information about current participants who will be continuing to participate
- De-activate staff members who will no longer be participating
- Re-activate staff who participated in the past, but did not participate in the most recent RMTS quarter

The system allows more than one way to complete most functions, including clicking on an action icon in the left hand column of the participant grid, opening a form by clicking on the Employee ID, making changes directly in the participant grid, or importing and exporting files.

Confirm that you are Working in the Correct Quarter

The RMTS System will default to displaying participant information related to the Next Quarter. But it’s always a good practice to double check that the Next Quarter is displayed in the ‘Quarter’ navigational field near the top left of the screen.
General Information about Using the ‘My Participants’ Grid

On the grid, you will notice that the first four columns will freeze as you scroll to the right, and filters at the top of every field will help you search for information as you type in the field. Find what works best for you.

Maximize your screen to see as many fields as possible. Fields listed include: Employee Number, Last Name, First Name, Email Address, Job Pool, Job Description, Job Type (Employee or Contractor) and Federally Funded %.
If you need to navigate to a different quarter, select the quarter from the ‘Quarter’ drop-down menu.

**My Participants**

- **Quarter:** Future Quarter: 2017 Jan - Mar
- **Fiscal Quarter Selected:** Q2 FY17
- **Current Quarter:** 2016 Jul - Sep

What can I do from the ‘My Participants’ Grid?

**Editing Information**

1. Click on the ‘pencil’ in the left hand column.
   a. As you tab across each field, it becomes interactive and you can update information.
   b. After your edits are complete, save your changes by clicking on the green check mark icon in the left column, or cancel your changes and return to the grid view without saving by clicking on the black ‘reverse’ arrow.

2. Click on the ‘Employee ID’
Inactivating Participants

If someone is no longer going to participate in the RMTS program for the next quarter or indefinitely, they can be marked as inactive. If someone leaves during the quarter and moments have been generated, see the section on Change of Status (COS) forms.

**Option 1: Click on the red X in the left hand column.**

<table>
<thead>
<tr>
<th>Employee ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>UMMS81078</td>
<td>American Cheese</td>
<td>Robert</td>
<td><a href="mailto:Robert@Mmail.net">Robert@Mmail.net</a></td>
</tr>
<tr>
<td>UMMS81066</td>
<td>Apple</td>
<td>Timothy</td>
<td><a href="mailto:Timothy@Mmail.net">Timothy@Mmail.net</a></td>
</tr>
<tr>
<td>UMMS63586</td>
<td>Apple-Juice</td>
<td>Twila</td>
<td><a href="mailto:Twila@Mmail.net">Twila@Mmail.net</a></td>
</tr>
</tbody>
</table>

a. You will see a confirmation box. Click ‘Yes.’
b. The person’s information will no longer be displayed on the grid (unless you choose the option to display inactive participants).

Option 2: Click on the Employee ID

![Employee ID Grid]

![Profile Form]

c. Edit Participant form opens. Change ‘Active Yes or No’ field to ‘No’. Click Save.
Returning Inactive Participants
When a prior RMTS participant returns to the RMTS program for the next quarter, you can reactivate their participant information to include them. This prevents having to re-enter information.

Option 1: Click on the box labeled ‘Include Inactive Participants’ on the right side, above the grid.

a. Click on the green arrows in the left hand column.

b. You will see a confirmation box. Click ‘Yes.’

c. The person’s information will be displayed on the grid as an ‘active’ participant.

Option 2: Click on the Employee ID
a. Edit Participant form opens. Change ‘Active Yes or No’ field to ‘Yes.’ Click ‘Save.’

Adding New Participants

Click on the ‘Add New Participant’ link at the top of the grid.

a. Complete the Add Participant Form and click Save.
What can I do with Exporting/Importing Files?

1. If you have a lot of changes to make, you may find it easier to use the ‘Export to Excel’ and ‘Import Participant File’ icons on the top right of the participant grid. Begin by downloading your current list of participants by clicking on ‘Export to Excel’ as shown below.

   ![Export to Excel icon](image)

   a. **Update participants** by making edits directly in the Excel spreadsheet as needed.
      i. Edit any field directly in the spreadsheet
      ii. Use Dropdowns to help select valid choices for each field
      iii. Use Excel functions if helpful, such as ‘Copy / Paste’ and Sort/Filter
      iv. Make sure all information for all participants is current and accurate for the new quarter
         1. Don’t forget to check participant email addresses and Supervisor email addresses that may have changed.

   ![Example spreadsheet](image)

   b. **Add New Participants** by scrolling down to the bottom of the participant list and adding the required information to a new, blank row of the spreadsheet.
      i. Use the drop-down menus to select valid values for accurate information.
      ii. You may choose to leave the ‘Employee ID’ field blank for the system to generate a unique ID for your new participants.
         *(See example on next page)*
If you need to re-activate an individual who participated in the RMTS previously, but not in the most recent quarter, please do not add them as a new participant. Instead, use the online screen option to re-activate them, as described in the ‘Returning Inactive Participants’ section of this manual on prior pages.

c. De-activate participants by highlighting the entire row that contains the participant’s information, and deleting that entire row from the file.

Tip This is most easily accomplished by clicking on the row number on the left hand side of the spreadsheet to highlight the row, then use the ‘right click’ of your mouse to bring up a drop down menu. Choose ‘delete’ from the drop down menu. You’ll know you completed this step correctly when the participant’s information you selected to delete is gone from the spreadsheet, and there are no blank row(s) where the information used to be.

d. Name and save your file.
   i. Note there is no special naming convention requirement for the file name.
ii. We suggest you name the file something that will be helpful and meaningful to you so that you can accurately identify the file when you browse for it.

iii. File names cannot exceed 45 characters in length.

iv. The file format cannot be changed (i.e. the file must be in the latest version of Excel (.xlsx))

e. Click on the ‘Import Participant File’ icon on the top right.

f. Confirm the Year, Quarter, then click ‘Browse.’

g. Select your file based on the name you assigned it and click ‘Upload.’
h. Review the **Import Report** to verify the changes. This report identifies all changes that your upload file will make to your list of participants. These changes are detailed in three (3) sections:

i. New Participants

ii. Deactivated Participants

iii. Upload Changes

![](image)

a. **Review the changes** to make sure that everything is accurate. Then you must choose one of the following actions:

iv. **Review**: Click this button to export an Excel version of the report for further review. This is helpful if you have made a lot of changes and would like more time to check that they are all correct.

   *Note: If you select this option, you will need to return to the ‘Import Status’ tab screen later to ‘confirm’ or ‘reject’ the upload file.*

v. **Confirm**: Click this button to confirm that the changes in the file are accurate and to process those changes.

vi. **Reject**: Click this button to reject the upload file if errors have been found. Once an upload file has been rejected, you then need to correct and re-upload a new file.
b. Click on the **Import Status** tab, click on the Excel Report icon to open the Import Report and **Confirm** it if the report is still in Review status. It should be ‘successful’ when done.
Complete Quarter – Finalizing Participant Management
When all updates have been completed, and before the submission deadline listed in Section A, click ‘Complete Quarter’ in the lower right hand corner. This will confirm that you have completed your updates for the next quarter and it will lock the system. If for any reason you realize you need to make changes after you have already marked a quarter as complete, contact UMMS to open the Participant Management screens for you.

New Change of Status Request during the Quarter
If someone is not able to participate in the Random Moment Time Study after moments have been generated, you can submit a Change of Status Report using the My Participants screens.

  Locate the participant for the Change of Status and click on the ‘Employee ID’ for that person.

  a. Click ‘New Change of Status Request’
b. Select Change of Status Type from the drop-down menu.

c. Depending upon the Change of Status Type, other questions will be asked. When completed, click Submit.
d. You will receive a confirmation message. Click confirm.

D. Resources

For assistance please e-mail MedicaidAdmMatch@umassmed.edu or call 1-800-535-6741.