

Changing Employee Identifiers in the Payroll-Based Journal (PBJ) System

CMS is aware of situations when a facility needs to change the employee ID for one or more of its staff (examples below). In order to maintain the reporting of an employee's hours through an employee ID change, we are adding a method that facilities can use to link an old employee's ID to a new one. This feature will be available through the Payroll-Based Journal (PBJ) system beginning November 20, 2017.

The method in which this is being implemented in PBJ is through a Linking table. The PBJ system will assign a system generated ID to each employee ID. When a facility links a new employee ID to an old employee ID, the system will link both of these IDs to the same system ID. Therefore, the two or more individual Employee IDs each can have hours logged to it, and both will be tied to the same system ID. This functionality will enable CMS to more accurately report on measures such as turnover and tenure. NOTE: For purposes of existing PBJ Reports and screens, the individual Employee ID's will continue to appear on the reports as two or more Employee ID's assigned by the facility. The new field, System Employee ID, is being added, which will show the individual Employee ID's together on reports under one System Employee ID, if this option is selected.

When might you use this?

Employee = the real person

Employee ID = An ID assigned by the Facility or representative of the Facility

System Employee ID: An ID assigned by the PBJ System. This ID will be the same for linked Employee ID's

1. Scenario #1: An employee leaves the facility, and then is rehired months later. The timekeeping system the facility uses automatically assigns the employee a new Employee ID when they are rehired (the second Employee ID for the same person).
 - a. What to do:
 - i. In PBJ, when the employee returns, add the Employee using the second Employee ID. Once it's added, you can begin logging hours toward this second Employee ID.
 - ii. Assuming you have not deleted the Employee ID for their first stint of employment, this first Employee ID and the second Employee ID will be submitted in a cross-reference XML file that will tell PBJ to "link" these two Employee IDs, when calculating hours for quality measures.
 - iii. After the employee ID's are linked, the old and new ID's still remain in PBJ and either can have hours logged to them. Do not delete either Employee ID.
2. Scenario #2: A facility changes HR Timekeeping Vendors. The new vendor cannot use the Employee ID's of the old vendor. Every employee in the facility will be given a new Employee ID.
 - a. What to do:
 - i. In PBJ, add all of the new Employee ID's of the new vendor as if these are all new employees. Once added, you can begin logging hours toward these new Employee ID's.
 - ii. Submit a cross-reference XML file that will tell PBJ to "link" corresponding Employee IDs, when calculating hours for quality measures.
 - iii. After the employee ID's are linked, the old and new ID's still remain in PBJ and either can have hours logged to them. Do not delete either Employee ID.

Other similar scenarios might include:

- A corporation acquires a facility and needs to change the facility's employee IDs to the corporate standard IDs.
- The submitter, on behalf of the facility, requires a standard employee ID.

Notes:

- The system will allow staffing hour submissions for the old and new Employee IDs.
- You must delete both Employee ID's for that Employee, if you want the employee deleted.
- The linking can only occur for Employee ID's in the same facility, not across facilities.

FAQ's

1. Once I link two employee ID's, can I go back and add hours or update hours on the old employee ID? Yes, both employee ID's still exist in PBJ as separate Employee ID's. The quarterly deadline rules apply to the hours associated with both individual Employee ID's.
2. Is there an "effective" date where the old ID is disabled and the new one begins? No, each ID continues to exist in PBJ as separate Employee IDs, and they are both tied to the same system ID.
3. Can I link employees in the middle of a quarter? Yes, the linking file can be submitted at any time. Note: The quarterly submission deadlines still apply.
4. Will providers be able to login and change the employee number through the PBJ online screens? No, there is no capability to "change" an employee ID online. The only way to represent two Employee ID's as one employee is to submit the XML linking file which will link the two employee IDs to the same system ID. The linking XML file will be submitted from the same PBJ screen that the current PBJ XML files are submitted.
5. Will CMS provide an Excel template to assist in auto generating the linking XML file? Yes, this will be posted on the CMS PBJ website in October.
6. What if I want to delete the employee? All staffing hours will need to be deleted for each Employee ID. Then you can delete each individual Employee ID that is associated with that employee. You can run PBJ CASPER report to give you this information.