

# **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 10<sup>th</sup> of the month preceding the start of each quarter.

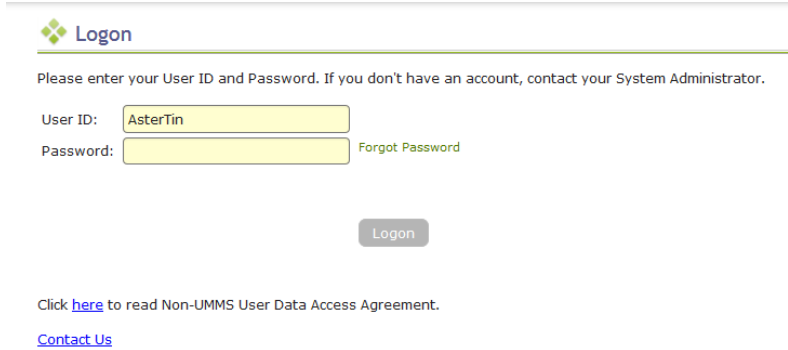
<u>Time Study Quarter:</u>	<u>Calendar Entry/Edit Deadline:</u>
July 1 – September 30	June 10
October 1 – December 31	September 10
January 1 – March 31	December 10
April 1 – June 30	March 10

## B. Logging on to the system

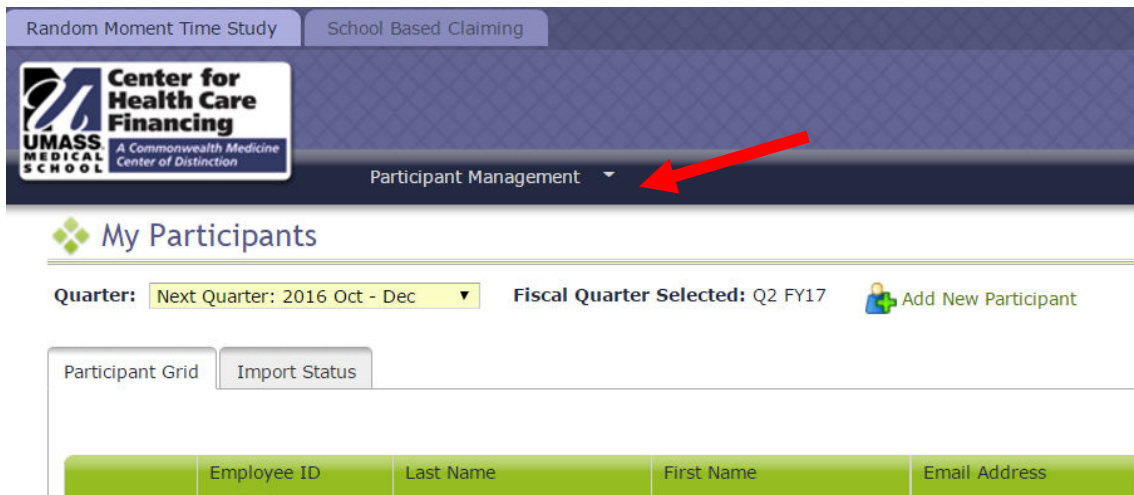
1. Participant Management information is entered into the RMTS section of the system.

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

Login with your User ID and password

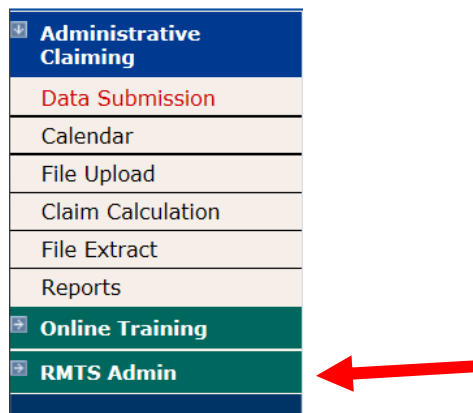


The screenshot shows the 'Logon' page of the RMTS system. It features a header with a green diamond icon and the word 'Logon'. Below the header, there is a message: 'Please enter your User ID and Password. If you don't have an account, contact your System Administrator.' There are two input fields: 'User ID:' with the value 'AsterTin' and 'Password:' which is empty. To the right of the password field is a link for 'Forgot Password'. A 'Logon' button is centered below the fields. At the bottom, there are two links: 'Click [here](#) to read Non-UMMS User Data Access Agreement.' and '[Contact Us](#)'.



The screenshot shows the 'Participant Management' interface. At the top, there are two tabs: 'Random Moment Time Study' and 'School Based Claiming'. Below the tabs is the 'Center for Health Care Financing' logo, which includes the text 'UMASS MEDICAL SCHOOL' and 'A Commonwealth Medicine Center of Distinction'. To the right of the logo is a dropdown menu labeled 'Participant Management' with a red arrow pointing to it. Below the logo and menu is the 'My Participants' section. It includes a 'Quarter:' dropdown set to 'Next Quarter: 2016 Oct - Dec' and a 'Fiscal Quarter Selected: Q2 FY17' label. There is also an 'Add New Participant' button with a plus icon. Below these are two buttons: 'Participant Grid' and 'Import Status'. At the bottom, there is a table header with columns: 'Employee ID', 'Last Name', 'First Name', and 'Email Address'.

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



The screenshot shows the left-hand navigation menu of the RMTS system. The menu is a vertical list of items. The top item is 'Administrative Claiming' with a dropdown arrow. Below it are 'Data Submission', 'Calendar', 'File Upload', 'Claim Calculation', 'File Extract', and 'Reports'. The next item is 'Online Training' with a plus icon. The bottom item is 'RMTS Admin' with a plus icon and a red arrow pointing to it.

## 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.

My Participants

Quarter: Next Quarter: 2016 Oct - Dec Fiscal Quarter Selected: Q2 FY17 Add New Participant

Participant Grid Import Status

	Employee ID	Last Name	First Name	Email Address
	<a href="#">UMMS81624</a>	Apple	Penny	susan.dadah@umassmed.edu
	<a href="#">UMMS81628</a>	Aster	Tina	susan.dadah@umassmed.edu
	<a href="#">UMMS81627</a>	Chocolate	Cynthia	susan.dadah@umassmed.edu
	<a href="#">UMMS81620</a>	Daffodil	Paul	susan.dadah@umassmed.edu

## 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.

	Employee ID	Last Name	First Name	Email Address
	<input type="text"/>	<input type="text" value="Bl"/>	<input type="text"/>	<input type="text"/>
	<a href="#">UMMS81690</a>	Blondie		Blondie@test.com
	<a href="#">UMMS81691</a>	Bloomers		Bloom@test.com
	<a href="#">UMMS81692</a>	Blossom		Blossom@test.com
	<a href="#">UMMS81722</a>	Thistleblossom		Thistleblossom@tst.com

abc Contains

abc Does not contain

abc Starts with

abc Ends with

= Equals

≠ Does not equal

Reset

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 %.

My Participants

Quarter: Next Quarter: 2016 Oct - Dec Fiscal Quarter Selected: Q2 FY17 [Add New Participant](#)

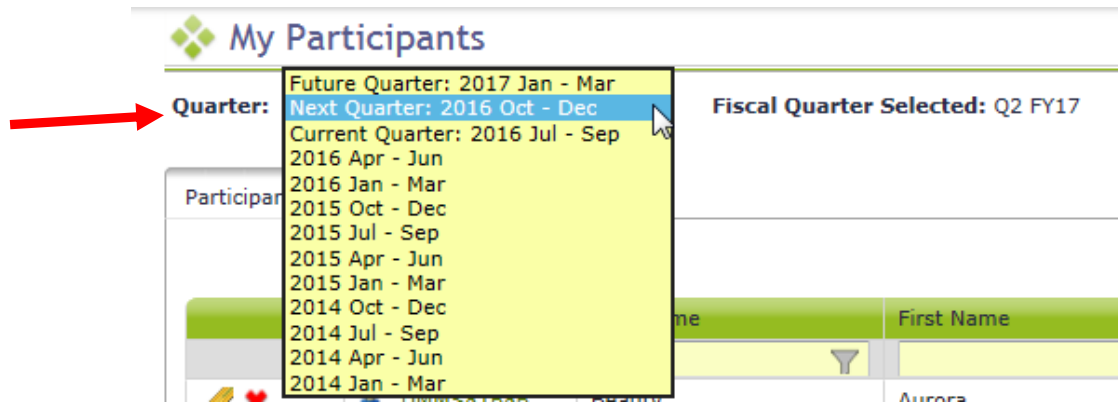
Participant Grid Import Status

Include Inactive Participants

	Employee ID	Last Name	First Name	Email Address	Job Pool	Job Description	Job Type E or C	Fed
	<a href="#">UMMS81078</a>	American Cheese	Robert	Robert@mymail.net	(All)	(All)	(All)	0
	<a href="#">UMMS81066</a>	Apple	Timothy	Timothy@mymail.net	All Participants	Chemical Dependency Professional	Employee	0
	<a href="#">UMMS63686</a>	Apple-Juice	Twila	Twila@mymail.net	All Participants	Mental Health Therapist	Employee	0
	<a href="#">UMMS26023</a>	Apricot	Tonya	Tonya@mymail.net	All Participants	Referral Scheduler Medical Records	Employee	0
	<a href="#">UMMS81068</a>	Artichoke	Kara	Kara@mymail.net	All Participants	Patient Benefits Tribal Assister	Employee	0
	<a href="#">UMMS81067</a>	Asparagus	Allison	Allison@mymail.net	All Participants	Chemical Dependency Professional	Employee	0
	<a href="#">UMMS25997</a>	Avocado	Dallas	Dallas@mymail.net	All Participants	Chemical Dependency Professional	Employee	0
	<a href="#">UMMS27124</a>	Beet	Michelle	Michelle@mymail.net	All Participants	Medical Receptionist	Employee	0
	<a href="#">UMMS81069</a>	Berry	Greg	Greg@mymail.net	All Participants	Chemical Dependency Supervisor/Manager/Admin	Employee	0
	<a href="#">UMMS81070</a>	Black-Eyed Pea	Jessica	Jessica@mymail.net	All Participants	Chemical Dependency Professional	Employee	0

5 10 20
Page 1 of 5 (48 items) 1 2 3 4 5

If you need to navigate to a different quarter, select the quarter from the 'Quarter' drop-down menu.



### What can I do from the 'My Participants' Grid?

#### Editing Information

1. Click on the 'pencil' in the left hand column.

The screenshot shows a grid with columns: Employee ID, Last Name, First Name, and Email. A red arrow points to the pencil icon in the left column of the first row.

	Employee ID	Last Name	First Name	Email
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<a href="#">UMMS81078</a>	American Cheese	Robert	RobertM@Mymail.net
	<a href="#">UMMS81066</a>	Apple	Timothy	Timothy@mymail.net
	<a href="#">UMMS63686</a>	Apple-Juice	Twila	Twila@mymail.net

- 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.

The screenshot shows the grid with a red arrow pointing to the green checkmark icon in the left column of the first row.

	Employee ID	Last Name	First Name	Email Address	Job Pool	Job Description	Job Type E or C	Fee
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	(All)	(All)	(All)	
	<a href="#">UMMS81078</a>	American Cheese	Robert	RobertM@Mymail.net	All Participants	Clinic Manager	Employee	0
	<a href="#">UMMS81066</a>	Apple	Timothy	Timothy@mymail.net	All Participants	Chemical Dependency Professional	Employee	0
	<a href="#">UMMS63686</a>	Apple-Juice	Twila	Twila@mymail.net	All Participants	Mental Health Therapist	Employee	0

2. Click on the 'Employee ID'

The screenshot shows the grid with a red arrow pointing to the 'Employee ID' field of the second row.

	Employee ID	Last Name	First Name	Email
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	<a href="#">UMMS81078</a>	American Cheese	Robert	RobertM@Mymail.net
	<a href="#">UMMS81066</a>	Apple	Timothy	Timothy@mymail.net
	<a href="#">UMMS63686</a>	Apple-Juice	Twila	Twila@mymail.net

- a. Edit Participant form opens. Makes edits and click Save.

## Edit Participant

---

**Fiscal Quarter Selected:** Q2 FY17

**Profile**

\* **Employee ID :**

\* **Last Name :**

\* **First Name :**

\* **Email Address :**

\* **Active Yes or No :**

**Job Details**

\* **Job Pool :**

\* **Job Description :**

\* **Job Type E or C :**

\* **Fed Fund % :**

\* **FTE :**

**Supervisor Emails**

\* **Supervisor Email #1 :**

**Supervisor Email #2 :**

**Supervisor Email #3 :**

New Change of Status Request
Save
Cancel

### Inactivating Participants

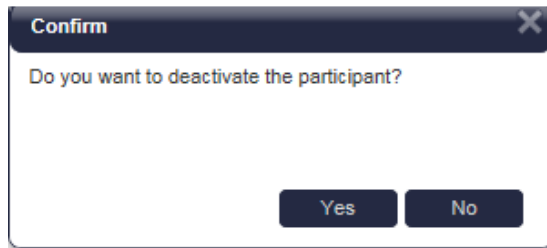
If someone is no longer going to participate in the RMTS program for the next quarter or indefinitely, they can be marked as inactive. If someone leaves during the quarter and moments have been generated, see the section on Change of Status (COS) forms.

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

	Employee ID	Last Name	First Name	Em
	<input type="text" value="UMMS81078"/>	<input type="text" value="American Cheese"/>	<input type="text" value="Robert"/>	Rot
	<a href="#">UMMS81078</a>	American Cheese	Robert	Rot
	<a href="#">UMMS81066</a>	Apple	Timothy	Tir
	<a href="#">UMMS63686</a>	Apple-Juice	Twila	Twi

- 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	Last Name	First Name	Em
	<a href="#">UMMS81078</a>	American Cheese	Robert	Rob
	<a href="#">UMMS81066</a>	Apple	Timothy	Tim
	<a href="#">UMMS63686</a>	Apple Juice	Twila	Tw

- c. Edit Participant form opens. Change 'Active Yes or No' field to 'No'. Click Save.

**Profile**

\* Employee ID :

\* Last Name :

\* First Name :

\* Email Address :

\* Active Yes or No :

**Job Details**

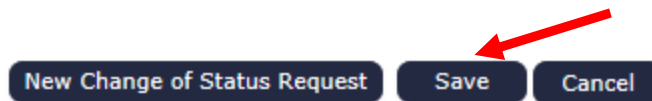
\* Job Pool :

\* Job Description :

\* Job Type E or C :

\* Fed Fund % :

\* FTE :



## 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.

**My Participants**

Quarter: Next Quarter: 2016 Oct - Dec Fiscal Quarter Selected: Q2 FY17 [Add New Participant](#)

Participant Grid Import Status

Include Inactive Participants

	Employee ID	Last Name	First Name	Email Address	Job Pool	Job Description	Job Type E or C	Fed Fund %	FT
 	<a href="#">UMMS81078</a>	American Cheese	Robert	RobertM@mymail.net	All Participants	Clinic Manager	Employee	0	1
 	<a href="#">UMMS81066</a>	Apple	Timothy	Timothy@mymail.net	All Participants	Chemical Dependency Professional	Employee	0	1
 	<a href="#">UMMS63686</a>	Apple-Juice	Twila	Twila@mymail.net	All Participants	Mental Health Therapist	Employee	0	1
 	<a href="#">UMMS26023</a>	Apricot	Tonya	Tonya@mymail.net	All Participants	Referral Scheduler Medical Records	Employee	0	1
 	<a href="#">UMMS81068</a>	Artichoke	Kara	Kara@mymail.net	All Participants	Patient Benefits Tribal Assister	Employee	0	1
	<a href="#">UMMS25993</a>	Artichoke	Rob	Rob@mymail.net	All Participants	Clinic Manager	Employee	0	1
 	<a href="#">UMMS81067</a>	Asparagus	Allison	Allison@mymail.net	All Participants	Chemical Dependency Professional	Employee	0	1
 	<a href="#">UMMS25997</a>	Avocado	Dallas	Dallas@mymail.net	All Participants	Chemical Dependency Professional	Employee	0	1
	<a href="#">UMMS25994</a>	Banana	Donna	Donna@mymail.net	All Participants	Care Coordinator	Employee	0	1
 	<a href="#">UMMS27124</a>	Beet	Michelle	Michelle@mymail.net	All Participants	Medical Receptionist	Employee	0	1

5 10 20 Page 1 of 9 (87 items) 1 2 3 4 5 6 7 8 9

b. You will see a confirmation box. Click 'Yes.'

**Confirm** ✕

Do you want to activate the participant?

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

Option 2: Click on the Employee ID

	Employee ID	Last Name	First Name
 	<a href="#">UMMS81686</a>	Beauty	Aurora
 	<a href="#">UMMS81687</a>	Berry	Snow White
 	<a href="#">UMMS81688</a>	Bibbidy	Cinderella

- a. Edit Participant form opens. Change 'Active Yes or No' field to 'Yes.' Click 'Save.'

**Profile**

\* Employee ID : UMM525993

\* Last Name : Artichoke

\* First Name : Rob

\* Email Address : Rob@Mymail.net

\* Active Yes or No : No

Yes

**Job Details**

\* Job Pool : All Participants

\* Job Description : Clinic Manager

\* Job Type E or C : Employee


\* Fed Fund % : 0

\* FTE : 1

## Adding New Participants

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

**My Participants**

Quarter: Next Quarter: 2016 Oct - Dec Fiscal Quarter Selected: Q2 FY17  Add New Participant

Participant Grid Import Status

- a. Complete the Add Participant Form and click Save.

**Add Participant**

Fiscal Quarter Selected: Q2 FY17

**Profile**

Employee ID :

\* Last Name :

\* First Name :

\* Email Address :

\* Active Yes or No : Select...

**Job Details**

\* Job Pool : Select...

\* Job Description : Select...

\* Job Type E or C : Select...

\* Fed Fund % :

\* FTE :

**Supervisor Emails**

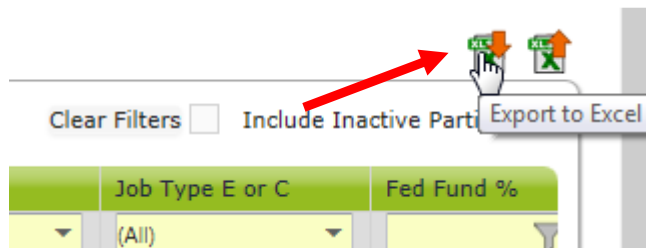
\* Supervisor Email #1 :

Supervisor Email #2 :

Supervisor Email #3 :

## 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.



- 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.

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Employee ID	Last Name	First Name	Email Address	Job Pool	Job Description	Job Type E or C	Active Yes or No	Fed Fund %	FTE	Supervisor Email #1	Supervisor Email #2	Supervisor Email #3
2	UMMS81078	American Cheese	Robert	RobertM@mymail.net	All Participants	Clinic Manager	Employee	Y	0	1	super@mymail.net		
3	UMMS81066	Apple	Timothy	Timothy@mymail.net	All Participants	Chemical Dependency Professional	Employee	Y	0	1	super@mymail.net		
4	UMMS63686	Apple-Juice	Twila	Twila@mymail.net	All Participants	Mental Health Therapist	Employee	Y	0	1	super@mymail.net		
5	UMMS26023	Apricot	Tonya	Tonya@mymail.net	All Participants	Referral Scheduler Medical Records	Employee	Y	0	1	super@mymail.net		
6	UMMS81068	Artichoke	Kara	Kara@mymail.net	All Participants	Patient Benefits Tribal Assister	Employee	Y	0	1	super@mymail.net		
7	UMMS25993	Artichoke	Rob	Rob@mymail.net	All Participants	Clinic Manager	Employee	Y	0	1	super@mymail.net		
8	UMMS81067	Asparagus	Allison	Allison@mymail.net	All Participants	Chemical Dependency Professional	Employee	Y	0	1	super@mymail.net		
9	UMMS25997	Avocado	Dallas	Dallas@mymail.net	All Participants	Chemical Dependency Professional	Employee	Y	0	1	super@mymail.net		
10	UMMS27124	Beet	Michelle	Michelle@mymail.net	All Participants	Medical Receptionist	Employee	Y	0	1	super@mymail.net		
11	UMMS81069	Berry	Greg	Greg@mymail.net	All Participants	Chemical Dependency Supervisor/Manager/Admin	Employee	Y	0	1	super@mymail.net		
12	UMMS81070	Black-eyed Pea	Jessica	Jessica@mymail.net	All Participants	Chemical Dependency Professional	Employee	Y	0	1	super@mymail.net		
13	UMMS78468	Blue Cheese	Letha	Letha@mymail.net	All Participants	Chemical Dependency Supervisor/Manager/Admin	Employee	Y	0	1	super@mymail.net		
14	UMMS26000	Blueberry	Kara	Kara@mymail.net	All Participants	Mental Health Therapist	Employee	Y	0	1	super@mymail.net		
15	UMMS26003	Broccoli	Emily	Emily@mymail.net	All Participants	Mental Health Therapist	Employee	Y	0	1	super@mymail.net		
16	UMMS26007	Brussel Sprout	Maytal	Maytal@mymail.net	All Participants	Mental Health Therapist	Employee	Y	0	1	super@mymail.net		

- 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)

	A	B	C	D	E	F	G	H	I	J	K
1	Employee ID	Last Name	First Name	Email Address	Job Pool	Job Description	Job Type E or C	Active Yes or No	Fed Fund %	FTE	Supervisor Email #1 S
44	UMMS81071	Pepper	Amber	Amber@mymail.net	All Participants	Chemical Dependency Professional	Employee	Y	0	1	super@mymail.net
45	UMMS26016	Pickles	Lashay	Lashay@mymail.net	All Participants	Medical Receptionist	Employee	Y	0	1	super@mymail.net
46	UMMS81077	Radish	Manny	Manny@mymail.net	All Participants	Nurse (RN)	Employee	Y	0	1	super@mymail.net
47	UMMS26020	Strawberry	Pamela	Pamela@mymail.net	All Participants	Medical Assistant	Employee	Y	0	1	super@mymail.net
48	UMMS25998	Tomato	Celia	Celia@mymail.net	All Participants	Mental Health Therapist	Employee	Y	0	1	super@mymail.net
49	UMMS26032	Watermelon	Dana	Dana@mymail.net	All Participants	Data Entry Coder	Employee	Y	0	1	super@mymail.net
50	UMMS26001	Watermelon	Masha	Masha@mymail.net	All Participants	Mental Health Therapist	Employee	Y	0	1	super@mymail.net
51		Newperson	Anna	Anna@mymail.net	All Participants						
52						Admin Assistant					
53						Application Coordinator					
54						Billing & Benefits Specialist					
55						Billing Clerk/Specialist					
56						Billing Manager					
57						Business Coordinator/Manager					
58						Care Coordinator					
59						Case Manager					

**Tip** 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.

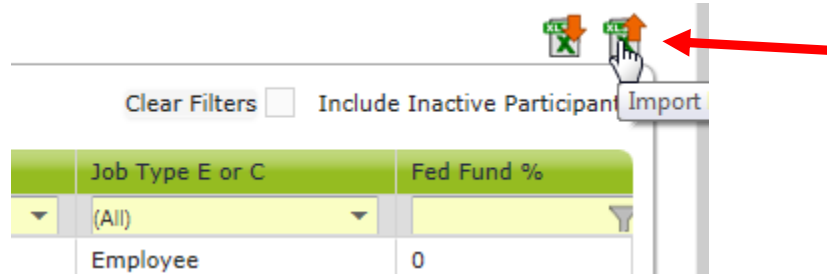
1	Employee ID	Last Name	First Name	Email Address	Job Pool	Job Description
2				RobertM@mymail.net	All Participants	Clinic Manager
3				Timothy@mymail.net	All Participants	Chemical Dependency Professi
4				Twila@mymail.net	All Participants	Mental Health Therapist
5				Tonya@mymail.net	All Participants	Referral Scheduler Medical Re
6			Kara	Kara@mymail.net	All Participants	Patient Benefits Tribal Assister
7			Rob	Rob@mymail.net	All Participants	Clinic Manager
8			Allison	Allison@mymail.net	All Participants	Chemical Dependency Professi
9			Dallas	Dallas@mymail.net	All Participants	Chemical Dependency Professi
10			Michelle	Michelle@mymail.net	All Participants	Medical Receptionist
11			Greg	Greg@mymail.net	All Participants	Chemical Dependency Supervis
12			Jessica	Jessica@mymail.net	All Participants	Chemical Dependency Professi
13			Letha	Letha@mymail.net	All Participants	Chemical Dependency Supervis
14			Kara	Kara@mymail.net	All Participants	Mental Health Therapist
15			Emily	Emily@mymail.net	All Participants	Mental Health Therapist
16			Maytal	Maytal@mymail.net	All Participants	Mental Health Therapist
17			Jessica	Jessica@mymail.net	All Participants	Mental Health Therapist
18			Ben	Ben@mymail.net	All Participants	Chemical Dependency Professi
19			Jessica	Jessica@mymail.net	All Participants	Mental Health Therapist
20			Aniezka	Aniezka@mymail.net	All Participants	Mental Health Therapist
21			Steve	Steve@mymail.net	All Participants	Health Administrator
22			Kimberly	Kimberly@mymail.net	All Participants	Mental Health Therapist
23			David	David@mymail.net	All Participants	Mental Health Therapist
24	UMMS26017	Coroa	Karen	Karen@mymail.net	All Participants	Mental Health Therapist

- d. **Name and save your file.**

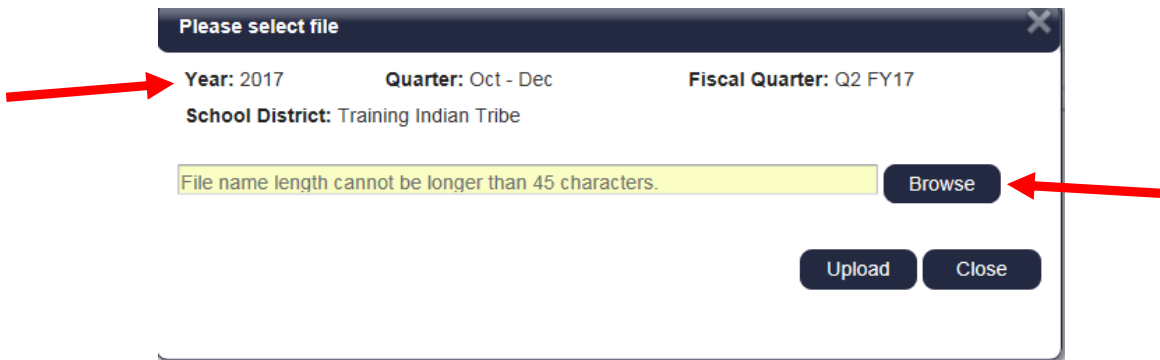
- i. Note there is no special naming convention requirement for the file name.

- 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))

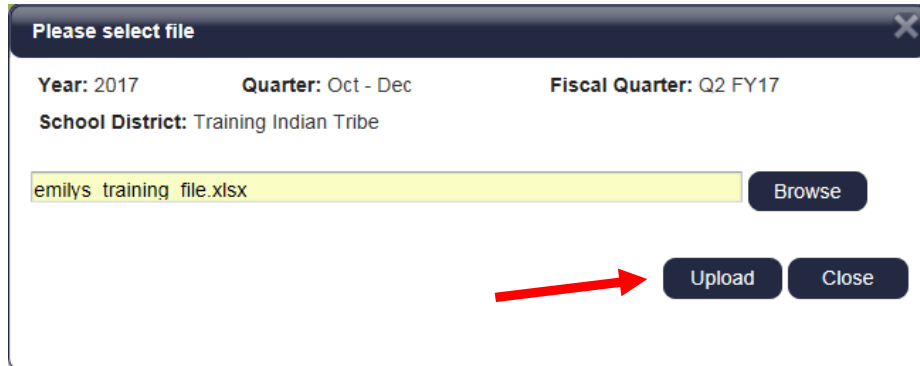
e. Click on the 'Import Participant File' icon on the top right.



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

**Import Report**

Confirm the following changes for the following school district

Year: 2017                      Quarter: Oct - Dec                      Fiscal Quarter: Q2 FY17  
 School District: Royal Princess Schools

**New Participants**

Last Name	First Name	Email Address	Job Description	Work Schedule	Supervisor Email #1
Newperson	Test	Windflower@tst.com	Psychologist		BigBadWolf@test.com

**Deactivated Participants**

Employee Id	Last Name	First Name	Email Address	Deactivated Start Date
UMMS81687	Berry	Snow White	Berry@test.com	10/1/2016 12:00:00 AM

**Upload Changes**

Employee Id	First Name	Last Name	Field Name	New Value	Old Value
UMMS81686	Aurora	Beauty	Email Address	Michael@test.com	Beaty@test.com

- 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.

**My Participants**

Quarter: Next Quarter: 2016 Oct - Dec Fiscal Quarter Selected: Q2 FY17 [Add New Participant](#)

Participant Grid **Import Status**

File Name	Status	Report	Imported-By
Royal Princess Schools FY17 Q2.xlsx	Review		Belle Teacup
Q2 FY17.xlsx	Successful		Belle Teacup



## 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.

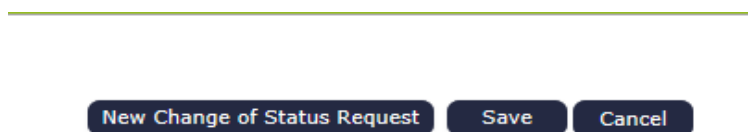
**My Participants**

Quarter: Next Quarter: 2016 Oct - Dec Fiscal Quarter Selected: Q2 FY17 Ad

Participant Grid Import Status

	Employee ID	Last Name	First Name
	<a href="#">UMMS81685</a>	Bayou	Tiana
	<a href="#">UMMS81687</a>	Berry	Snow White

- Click ‘New Change of Status Request’



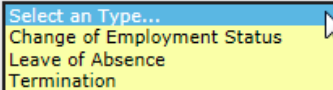
- b. Select Change of Status Type from the drop-down menu.

### Change of Status Request

#### Participant Information

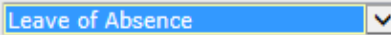
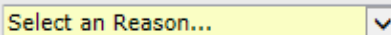
**Participant Name:** Tiana Bayou  
**Participant Employee ID:** UMMS81685  
**Job Pool:**  
**Job Description:** 607

#### Change of Status Request

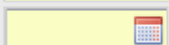
**Change of Status Type:**   
**Reason:**

- c. Depending upon the Change of Status Type, other questions will be asked. When completed, click Submit.

### Change of Status Request

**Change of Status Type:**   
**Leave of Absence Reason:**   
 Paid  
 Unpaid  
 Undetermined

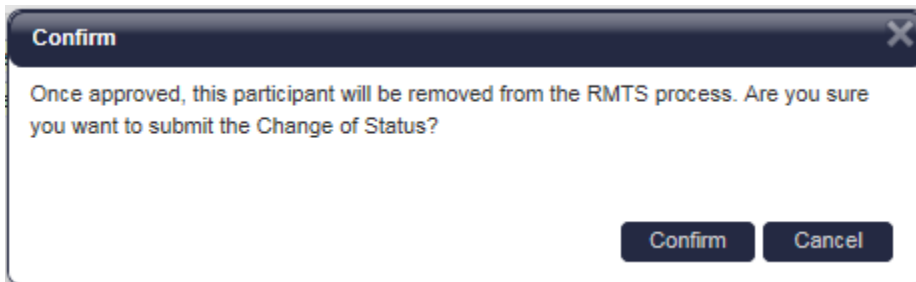
### Change of Status Request

**Change of Status Type:**   
**Change of Employment Status Reason:**   
**Change of Employment Status Start Date:** 

### Change of Status Request

<b>Change of Status Type:</b>	Termination
<b>Termination Reason:</b>	Select an Reason...
<b>Termination Start Date:</b>	<input type="text"/>

d. You will receive a confirmation message. Click confirm.



## D. Resources

For assistance please e-mail [MedicaidAdmMatch@umassmed.edu](mailto:MedicaidAdmMatch@umassmed.edu) or call 1-800-535-6741.