Payroll Based Journal (PBJ)
Excel to XML Template

Training Outline
- Excel to XML Template Instructions

Excel Proficiency
- Users must be proficient in Excel to perform the instructions and recommendations on this tab.

Excel 2010
- These templates were designed to work with Excel 2010.

Valid PBJ Data
- The User is responsible for getting their own valid data into the Excel format in the template provided and ensuring the data meets the rules of the PBJ Data Specifications. The PBJ Data Specifications can be found in the downloads section at https://www.cms.gov/Medicare/Quality-Initiatives-Patient-Assessment-Instruments/NursingHomeQualityInits/Staffing-Data-Submission-PBJ.html.

CMS Support
- The use of this spreadsheet to create an XML file is only supported by CMS once valid data has been manually entered or copied into the template.

Setting up Excel
- Add the Developer tab in Excel. This must only be set up once per machine.
- Instructions to show the Developer tab can be found here: https://msdn.microsoft.com/en-us/library/bb608625.aspx
    - o Start the Office application supported by this topic.
    - o On the File tab, choose the Options button.
    - o In the Excel Options dialog box, choose the Customize Ribbon button.
    - o In the list of main tabs, select the Developer check box.
    - o Choose the OK button to close the Options dialog box.

Spreadsheet Tabs
- Populate the appropriate spreadsheet tabs (e.g., Header, Employees, Staffing Hours, and Census). **The first row of example data must be deleted before entering your Header, Employees, Staffing Hours and Census data.**
- Only include one facility id in the header section (i.e., one row). Multiple rows are not valid.
- For staffing hours, repeat the employee id and applicable job title code and pay type code for each day being reported
- Only add complete rows of data (i.e., don't include census month-end dates for months that are not being reported).

Replace/Merge
- For staffing hours and census, update the processType to "replace" or "merge" as appropriate.

Delete Empty Tabs
- Delete Employee, Staffing Hours or Census tabs that are not populated. Errors will be encountered if empty tabs (i.e., sections without data) are not deleted when exported to XML.

Export to XML
- From the Developer toolbar, select "Export" and specify the XML file name to be saved
- If no errors are encountered, the XML file will be available at the specified save location

Errors
- If errors are encountered, a pop-up will be displayed stating "The XML data was successfully saved or exported. The data is not valid according to its schema." Even though an XML file was exported, it contains errors that must be corrected. Select the Details button for more information on the error. The XML is not "auto-corrected".

Submissions
- Zip one or more XML files and upload via the PBJ web application
- Note: To avoid generating invalid XML and/or to recover tabs that were deleted, the template should be downloaded each time an XML file is to be generated