Pennsylvania Bureau of Early Intervention Services and Family Support (BEISFS) Rate Study
PA Early Intervention (EI) Rate Study

Personnel Roster Instructions

12/12/2023

Pennsylvania Bureau of Early Intervention Services and Family Support (BEISFS)
Rate Study Personnel Roster Instructions

Pennsylvania Bureau of Early Intervention Services and Family Support (BEISFS) has contracted with Public Consulting Group LLC (PCG) to perform a rate study of its Early Intervention system. The goal of this analysis is to implement a comprehensive study of the cost of delivering early intervention services that meet best practice standards, support the mission of BEISFS, determine adequate rates for EI services, and provide equity of payment in those rates for providers.

Part of PCG's assessment involves collecting cost reports that capture expenses associated with carrying out early intervention programs at contracted provider agencies. Through the collection of the Pennsylvania EI system specific expense data from the cost reports and personnel rosters, PCG can assess the fiscal health of these programs state-wide. This document provides instructions on how to complete the personnel roster.

In addition to these instructions, PCG made itself available to providers throughout this engagement via email, video of online training and the following office hour sessions:

- Email Account: PABEISFSRateStudy@pcgus.com

- Office Hours:
    - Office Hours 1: Thursday, December 14th, 2023, from 4:00PM-5:00PM EST
      Join on your computer, mobile app, or room device
      Click here to join the meeting.

    - Office Hours 2: Wednesday, December 20th, 2023, from 12:30PM-1:30PM EST
      Join on your computer, mobile app, or room device
      Click here to join the meeting

    - Office Hours 3: Thursday, January 4th, 2024, from 10:00AM-11:00AM EST
      Join on your computer, mobile app, or room device
      Click here to join the meeting

    - Office Hours 4: Thursday, January 11th, 2024, From 11:30AM-12:30PM EST
      Join on your computer, mobile app, or room device
      Click here to join the meeting

- **Online training webinar: https://www.youtube.com/watch?v=JMzmkOtpyd0**

The office hours and email account above are available to all agency staff for any questions related to the cost report or personnel roster. The email account is actively monitored during normal business hours (9 a.m. to 5 p.m. Eastern Time Monday through Friday). The email account will also serve as the repository for all cost report submissions. ***The completed Personnel Roster and accompanying backup documentation must be submitted to PCG by Tuesday, January 16th, 2024.***

Please also note that this personnel roster should only contain information incurred by your agency during state fiscal year 2023 (July 1, 2022, to June 30, 2023).

Purpose of the Personnel Roster

Collecting personnel rosters as part of the cost study will allow for:
- a detailed salary analysis by position across the state;
- a turnover analysis by position across the state; and,
- running correlations between experience, education, certifications/licensure and retention.

Staff Included in the Personnel Roster

All employees that were employed during State Fiscal Year (SFY) 2023 (7/1/2022 – 6/30/2023) and provided direct services or supported the Early Intervention System program may be included. This includes both direct services staff and administrative staff.

Personnel Roster Form

The personnel roster form is based in a Microsoft Excel workbook (.xlsx) that is compatible with Microsoft Excel 2003, 2007, 2010, 2013 and 2016. One workbook for each Pennsylvania EI program should be submitted to PCG electronically.

Filling Out the Personnel Roster

Due 1/15/2024	State of Pennsylvania, Bureau of Early Intervention Services and Family Supports (BEISFS)
	Active Personnel Roster (Provider Agencies) (SFY 2022/2023)

BEISFS Provider Agency Name (Drop-Down)		Provider IRS Tax Status (Drop-Down)	
BEISFS Program Name (if different)		Provider County- Main Office (Drop-Down)	
Contact Name		Reporting Period	SFY2023 (July 1, 2022 to June 30, 2023)
Contact E-mail			

Please include ALL active employees AND subcontractors that may deliver BEISFS early intervention services

1. *Begin by filling out the top section of the personnel roster.*
   - Select your Early Intervention System Provider Agency name from the dropdown menu.
   - Type the Early Intervention System program name into the "BEISFS Program Name" field if it is different from the agency name.
   - Select your provider IRS Tax Status from the dropdown menu.
     - For-Profit
     - Non-Profit
   - Select your county of operation from the dropdown menu.

Please note that all active staff during State Fiscal Year 2023 (7/1/2022-6/30/2023) should be included, whether they are full time salaried, part time salaried employees, part time hourly employees, or independent contractors.

2. *Fill out the roster section of the personnel roster shown below. Use a separate line for each employee. Please fill out each field listed below for each employee.*

#	Last Name or ID Number/Mnemonic	First Name or ID Number/Mnemonic	Employee Type (Drop-Down)	Primary Role / Discipline (Drop-Down)	Secondary Role / Discipline (Drop-Down)	Actual Title
1	Rigsby	Jill	Full Time Employee	Special Instructor		
2	Wyrick	Zane	Part Time Employee	Physical Therpist		
3	Carbeau	Joe	Full Time Employee	Occupational Therapist		Director
4						

Last Name: Type the last name of the person or initials or ID or other way you can identify them.

First Name: Type the first name of the person or initials or ID or other way you can identify them.

Employee Type: Indicate via the drop-down menu whether the person is a Full-Time Employee, Part-Time Employee, or Contractor.

Primary EI Role Category: Many personnel that deliver Early Intervention services are part of a professional role regularly associated with EI services. By associating staff with these roles, PCG can better categorize staff that may otherwise have unique positions. Use the dropdown menu by selecting this cell and indicating the appropriate title for the personnel based on their primary function for the Early Intervention System program. Options include:

- Admin/Billing
- Audiologist
- Nutritionist/ Registered Dietician
- Orientation and Mobility Specialist
- Physical Therapist
- Physician/Pediatrician
- QA Specialist
- Registered Nurse
- Service Coordinator
- Social Worker
- Special Instructor
- Special Instructor (Behavior)
- Special Instructor (Deaf/Hard of Hearing)
- Special Instructor (Nutrition)
- Special Instructor (Vision)
- Speech Pathologist
- Supervisor Manager
- Trainer/Coach/Mentor
- Vision specialists, including ophthalmologists and optometrists
- Occupational Therapist
- Family Therapist

Secondary EI Role Category: If your job title entails more than one EI profession or role, select a secondary title by EI profession.

Actual Title: Type the person's actual title as your agency calls it.

Union Status (Drop-Down)	Bi-Lingual Status (Drop-Down)	Highest Education Reached (Drop-Down)	Professional Licensure(s)	End/Term Date, if applicable
Yes	Other	Masters Degree (MA/MS)		12/5/2022
No	Spanish	Doctorate Degree (PhD)		
Yes		Doctorate Degree (PhD)		

Union Status: If a person is unionized, select yes or no from the drop-down menu.

Bi-Lingual Status: If a person uses a second language to conduct their business at any point, select the second language from the drop-down menu.

Highest Education Reached: Select from the drop-down menu the highest level of education the personnel have completed.

Professional Licensure: Type any professional licensures the personnel may have.

End/Term Date: Enter the date the person stopped working, if applicable. If they are still a staff person, leave the end date blank.

Please enter the # of hours in a full-time workweek at your organization in T5

Full-Time =	35.0	hours per week
=	1820.0	hours per year

Totals:	$354,250.00	$31,750.00					3.37	2.03	9,829.00	$379,250.00	$354,250.00
# Hours Paid Annually (in SFY22 & 23)	Total Annual Salary or Amount Paid (in SFY22/23)	Total Annual Taxes & Fringe Benefits Paid (in SFY22/23)	% Time Allocated to BEISFS-Direct Services	% Time Allocated to BEISFS-Supv & Support	% Time Allocated Elsewhere (Non-BEISFS)	Total % Time Allocated	Direct Service FTE	Admin FTE	BEISFS Hours Allocated	Total Annual Personnel Expenses	Total Annual BEISFS Personnel Expenses
473.0	$37,500.00	$3,750.00	100%	0%	0%	100%	0.3	0.0	473.00	$ 41,250	$ 41,250
1040.0	$80,000.00	$8,000.00	100%	0%	10%	110%	0.6	0.0	1040.00	$ 88,000	$ 88,000
1820.0	$100,000.00	$10,000.00	50%	40%	10%	100%	0.5	0.4	1638.00	$ 110,000	$ 99,000

 # Hours Paid Annually: Indicate the number of hours each person worked annually. This field should include all hours paid including paid time off (PTO). The hours and other figures on this roster are meant to capture all active personnel information for anyone that delivers Early Intervention System services.

Total Annual Salary or Amount Paid: Type the total salary or amount paid to each person annually.

Total Annual Taxes & Fringe Benefits Paid: Type the total fringe benefits allocated to each employee annually. This should include worker's compensation, healthcare, retirement, and/or other fringe benefits.

% time Allocated to BEISFS- Direct Service: Type the **percentage** of each person's time dedicated to the Early Invention program for Direct Services only.

% time Allocated to BEISFS- Supervising & Support: Type the **percentage** of each person's time dedicated to the Early Invention program for Supervising and Support only.

% time Allocated Elsewhere: Type the **percentage** of each person's time dedicated to other programs other than EI.

Total % Time Allocated: This field will automatically calculate and is intended as a check figure. Each cell has a formula and if you filled out columns Z:AB correctly, each cell under this column should equal to 100%. For each cell that does not equal to 100% that has an employee on that row, please review and correct what was entered in columns Z:AB.

Direct Service FTE: This field will automatically calculate the FTE for each employee and for the entire reporting entity. The total for your entity is summed in cell AD10. This is your total Direct Service FTEs to report on the Cost Tool.

Admin FTE: This field will automatically calculate the FTE for each employee and for the entire reporting entity. The total for your entity is summed in cell AE10. This is your total Admin FTEs to report on the Cost Tool.

BEISFS Hours Allocated: This field will automatically calculate using the # Hours Paid Annually and the % Time Allocated to BEISFS to calculate the hours per year dedicated to BEISFS.

Total Annual Personnel Expenses: This field will automatically calculate by summing the values from the "Total Salary" and "Total Fringe Benefits" columns and is your total entity's personnel costs.

Total Annual BEISFS Personnel Expenses: This field will automatically calculate by multiplying "Total Personnel Expenses" by the "% Time Allocated to BEISFS" and is your total entity's personnel costs related to BEISFS. The total in AH10 should match costs reported in the Cost Tool cell C56.

Returning the Personnel Roster

Please submit the completed personnel roster via the PA EI Rate Study Website by Tuesday, January 16th, 2024.