TEXAS
Department of Aging
and Disability Services

REGULATORY SERVICES

Waiver Survey & Certification

**Work Measurement Study for the Period
April 2005 - October 2005**

Final Report

June 2006

Prepared by

**Performance & Workload Measurement Unit
Office of Budget & Data Management Services**

ACKNOWLEDGMENTS

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BACKGROUND

At the request of Department of Aging and Disability Services (DADS) Assistant Commissioner for Regulatory Services, Veronda Durden, and DADS Chief Financial Officer, Gordon Taylor, the work measurement study (WMS) of Regulatory Services Waiver Survey & Certification surveyors was conducted by the Performance and Workload Measurement (PWM) unit.

The study provides valid and reliable information about the amount of time Waiver Survey & Certification surveyors spend on regulatory and related activities.

Additionally, study results provide:

- information for evaluating the impact of program and policy changes on conducting compliance reviews, and;
- analytical tools for use by budget staff in the development of the:
    - Legislative Appropriations Request,
    - Equity of Service Statement, and;
    - Centers for Medicare and Medicaid Services (CMS) Mission Letter.

STUDY DESIGN

Methodology

To develop Waiver Survey & Certification surveyor standards and percentages of time with a high degree of statistical reliability at the statewide level, PWM employed a simple random sampling methodology. The sampling occurred in two stages:

1) start dates (day to start recording work activities) were randomly assigned to participants, and,
2) time samples (recording of activity) were randomly collected from each participant using Personal Digital Assistants (PDA's).

Participation

The scheduled six month Waiver Survey & Certification study period was April 2005 – September 2005.

Seventeen (17) Waiver Survey & Certification surveyors (Program Specialist III's) were employed in the area during the study period and participated in the study. Since surveyors are not assigned to regions, only statewide validity was obtained.

Each surveyor participated for at least 80 work hours while submitting a minimum of 184 completed time samples. If a participant was not at work because of annual, sick, or compensatory leave, their participation dates were extended to reach the minimum number of samples required.

During the individual study periods, participants used a PDA set to emit random signals (optional beep or vibration) at an average of 2.5 times an hour. Participants were required to have the device on whenever they were working, including work occurring outside their normal assigned hours (See Appendix A).

Data Collection

Participants were asked for basic identification and work environment information at the beginning of the study. Throughout the study, participants entered activity information directly into the PDA.

Each time the device signaled, the participant recorded the corresponding Program Type, Compliance Review Type, and Activity Type they were performing at the moment of the signal (See Appendix B).

Interactive PDA menu selections automated the recording of activities. Data not associated with random observations, such as travel and lunch times were also entered into the PDA.

Participants were requested to submit collected data at least once per week via the PDA "hot-synch" method that electronically transmitted their data to the PWM server (See Appendix C).

Confidence Intervals

When sampling is used to collect information, the intent is to draw conclusions about the universe from which the samples are selected. There is always a margin of error associated with this generalization process. The 95% confidence interval is the standard statistical index of the margin of error.

Because of the large number of samples collected throughout the Regulatory Services study (over 3,300 time samples); data for the percentages of time participants spent in given activities and standard times calculated are precise. A 95% confidence interval was achieved.

Data Integrity

To ensure data integrity, there were a number of quality assurance steps and techniques employed, such as:

- extensive one-on-one phone training and instruction, with written instructions (see Appendix C);
- PDA automated menus allowing only logical activity entry combinations;
- PWM analysts reviewed participant submitted data throughout the study period;
- PWM analysts established data-cleaning procedures to capture and correct data entry errors prior to analysis of the data;
- a random sample of participant-collected study data was cross checked with actual program data records; and
- the standard times derived from study data was reviewed with program subject matter experts.

KEY FINDINGS

Standard Times

Of the eight (8) possible standard time combinations for Program Types and Compliance Review Types, five (5) combinations had sufficient data to determine standard time.

Three (3) within HCS and two (2) within TxHmL:

Home and Community-based Services	Initial	13 hours	and	53 minutes
	Annual Certification	49 hours	and	37 minutes
	Follow Up	20 hours	and	33 minutes
Texas Home Living	Initial	21 hours	and	53 minutes
	Annual Certification	48 hours	and	19 minutes

Program Types

For Program Types, nearly sixty (59.4%) percent of surveyor time is spent within HCS. TxHmL comprised nineteen (19.0%) percent of surveyor time.

The percentage of time spent by surveyors in each Program Type is summarized as follows:

Home and Community-based Services	59.4%
Texas Home Living	19.0%
General Program Related	19.1%
Non-Work	2.5%

Compliance Review Types

The percentage of time spent by surveyors in each Compliance Review Type is summarized as follows:

Annual Certification	69.6%
Initial	16.9%
Intermittent/Drop By	7.3%
Follow Up	6.2%

Activity Types

When analyzing Activity Types by functional groups, nearly half (48.5%) of surveyor time is spent within Certification-related Activity Types. Thirty-two (32.1%) percent of surveyor time is spent in travel or travel-related activities, and nineteen (19.4%) percent in preparation and reporting activities.

The percentage of surveyor time by functional group is summarized as follows:

Preparation & Reporting 19.4%	Pre-survey Preparation	13.4%
	Report Generation	5.9%
	Record Review Information Gathering	15.8%
	Information Analysis	10.2%
	Debriefing/Exit Conference	6.9%
Certification 48.5%	Interview w/Paid Staff Information Gathering	4.5%
	Providing Information	4.5%
	Observation Information Gathering	2.5%
	Interview w/Stakeholder Information Gathering	2.4%
	Entrance	1.8%
Travel-related 32.1%	Travel	28.4%
	Trip Planning & Post	3.8%

RESULTS

Standard Times Defined

Standard times are the average time to perform or complete a given compliance review within a given Waiver Survey & Certification Program Type. The standard time calculated for compliance review completion incorporates all time spent by surveyors, whether individually or collectively. The time samples reported, and activities completed by study participants served as the basis for developing standard times and for determining percentages of time devoted to work activities.

*This report presents standard times for Program Type/Compliance Review Type combinations for which sufficient data was available. Where sufficient data was not available, **NS** (not sufficient) is listed.*

Standard times are stated in hours and minutes (i.e., a standard time of 1:15 is equal to one hour and fifteen minutes).

Program Types Defined

- **Home and Community-Based Services (HCS) Waiver:** An ICF-MR/RC waiver program designed to serve persons with mental retardation and related conditions living at home, independently, in foster care, or in residential services in a home serving no more than four individuals. Contracts are based on geographic regions and providers must be certified shortly after the first individual is enrolled in the contract and annually thereafter. A license is not required.

- **Texas Home Living (TxHmL) Waiver:** An ICF-MR/RC waiver program designed to provide limited services to persons with mental retardation and related conditions in their own or family home. Services include service coordination, community support, day habilitation, respite care, nursing, dental, minor home modifications, adaptive aides, employment services and professional therapies. Contracts are based on geographic regions and providers must be certified shortly after the first individual is enrolled in the contract and annually thereafter. A license is not required.

- **General Program-Related:** Performance of Waiver Survey & Certification associated activities but the duties cannot be identified with a specific Program Type. Examples include: attending unit meetings, seminars or training, and/or reviewing memoranda and emails.

- **Non-Work:** Performance of Non-Work related activities during the paid workday, as well as time spent working on the study. Examples include: personal phone calls, breaks, and speaking with PWM staff.

Compliance Review Types Defined

- **Initial:** A compliance review conducted within 120 days of a contract receiving its first consumer to determine compliance with certification principles.

- **Annual Certification:** A compliance review for recertification of contracts.

- **Follow Up:** A compliance review conducted to determine if corrective action has been completed for items cited during a previous compliance review.

- **Intermittent/Drop By:** A compliance review or on-site visit (drop-by) conducted in response to a complaint, Abuse/Neglect/Exploitation, or administration concern.

Standard Times for Program Types by Compliance Review Type

The WMS instrument gathered information on two (2) Program Types (HCS and TxHmL), four (4) Compliance Review Types (Initial, Annual Certification, Follow Up, and Intermittent/Drop By), and twelve (12) Activity Types (Appendix A, Work Measurement Study Definitions).

Of the eight (8) possible standard time calculations for Program Types (e.g. HCS/Initial), five (5) combinations produced valid calculations: Three (3) for HCS and two (2) for TxHmL.

Table-1 provides a summary of the standard time calculations.

Standard Times in Hours and Minutes by Program Type/Compliance Review Type

Table-1.	Initial	Annual Certification	Follow Up	Intermittent/Drop By
Home and Community-based Services	13:53	49:37	20:33	*NS*
TX Home Living	21:53	48:19	*NS*	*NS*

Percentage of Time by Program Type

HCS (59.4%) and TxHmL (19.0%) account for over seventy-eight (78.4%) percent of surveyor time. General Program Related (19.1%) and Non-Work (2.5%) comprise the remaining time.

Figure 1 provides the percentage of time spent on each Program Type.

Percentage of Time by Program Type

Figure 1
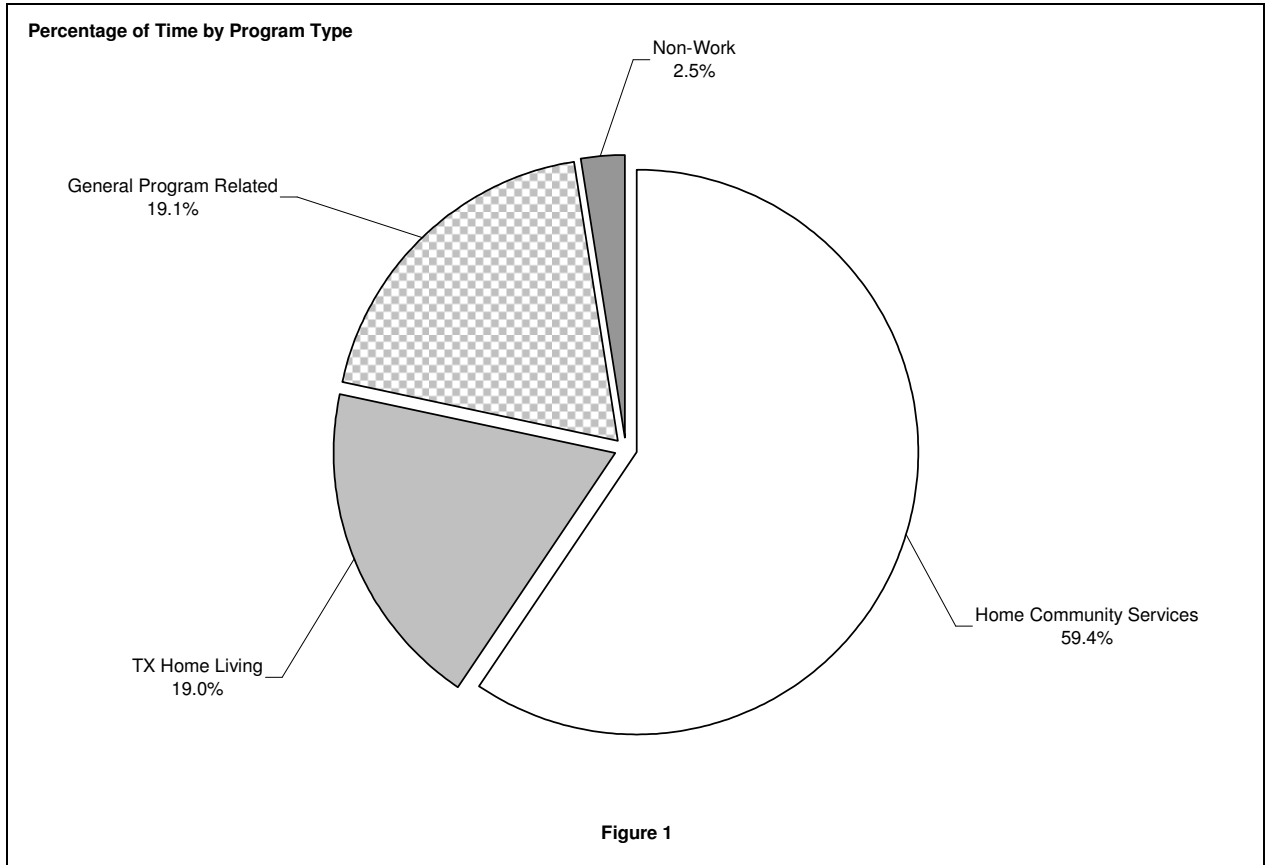
Waiver Survey & Certification – Program Types

- Home and Community-based Services   59.4%

- TX Home Living   19.0%

- General Program Related   19.1%

- Non-Work   2.5%

Percentage of Time by Compliance Review Type

Of the total surveyor time spent on HCS and TxHmL compliance review-related work[1], Annual Certification (69.6%) and Initial (16.9%) comprise nearly eighty-seven (86.5%) percent of surveyor time.

Intermittent/Drop By (7.3%) and Follow Up (6.2%) encompass the remaining portion of surveyor time.

Figure 2 provides the percentage of time surveyors spent within each Compliance Review Type.

Figure 2
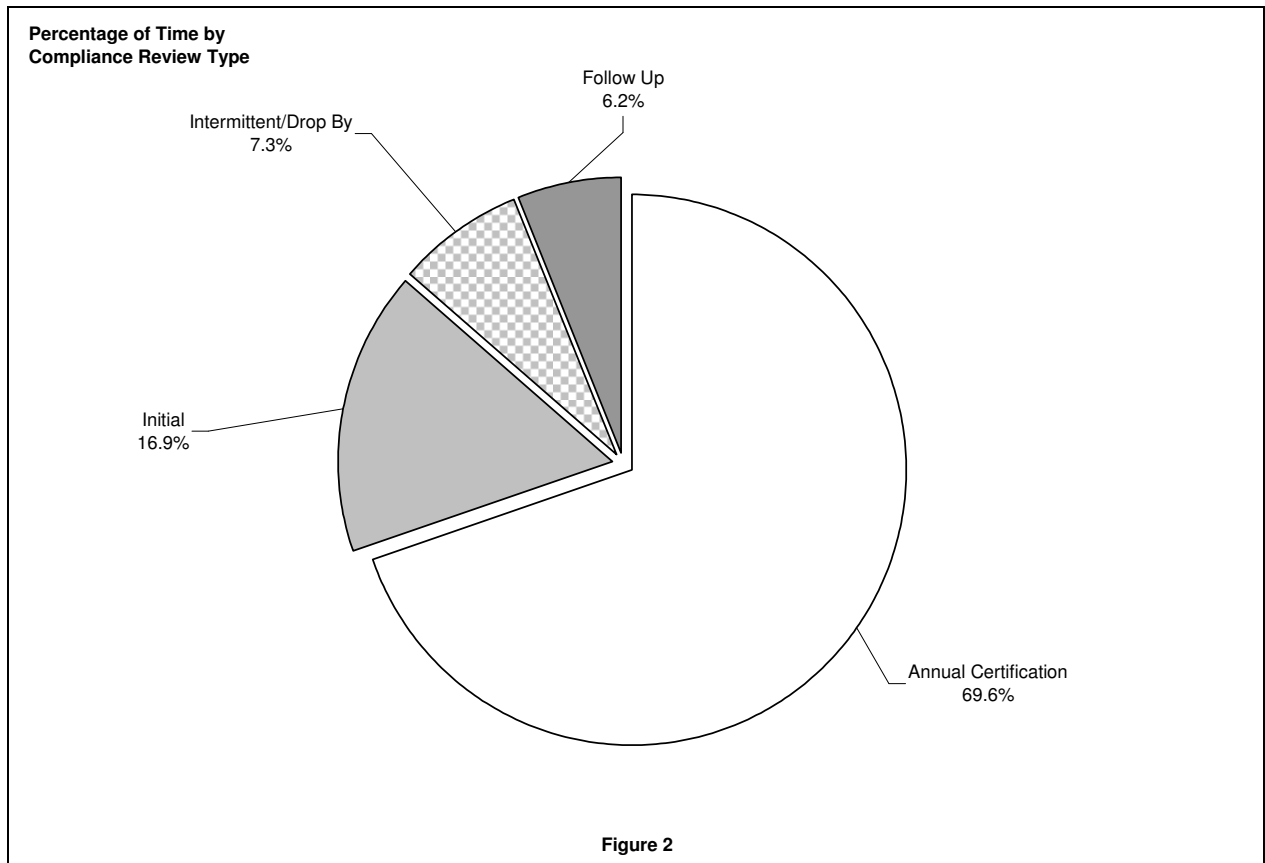
Waiver Survey & Certification – Compliance Review Types

- Annual Certification   69.6%
- Initial   16.9%
- Intermittent/Drop By   7.3%
- Follow Up   6.2%

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[1] Program Types "General Program Related" and "Non-Work" do not have associated compliance review activities and are excluded.

HCS

Previously, Figure 1 showed that HCS comprised nearly sixty (59.4%) percent of surveyor time spent.

When re-calculating for Compliance Review Types within HCS, Annual Certification (77.2%) accounted for the vast majority of surveyor-collected time samples.

Intermittent/Drop By (9.6%), Follow Up (8.1%), and Initial (5.0%) comprise the remaining portion of surveyor time within HCS Compliance Review Types.

Figure 3 provides the percentage of time spent on each Compliance Review Type within HCS.

HCS by Compliance Review Type

Initial
5.0%

Follow Up
8.1%

Intermittent/Drop By
9.6%

Annual Certification
77.2%

Figure 3

HCS
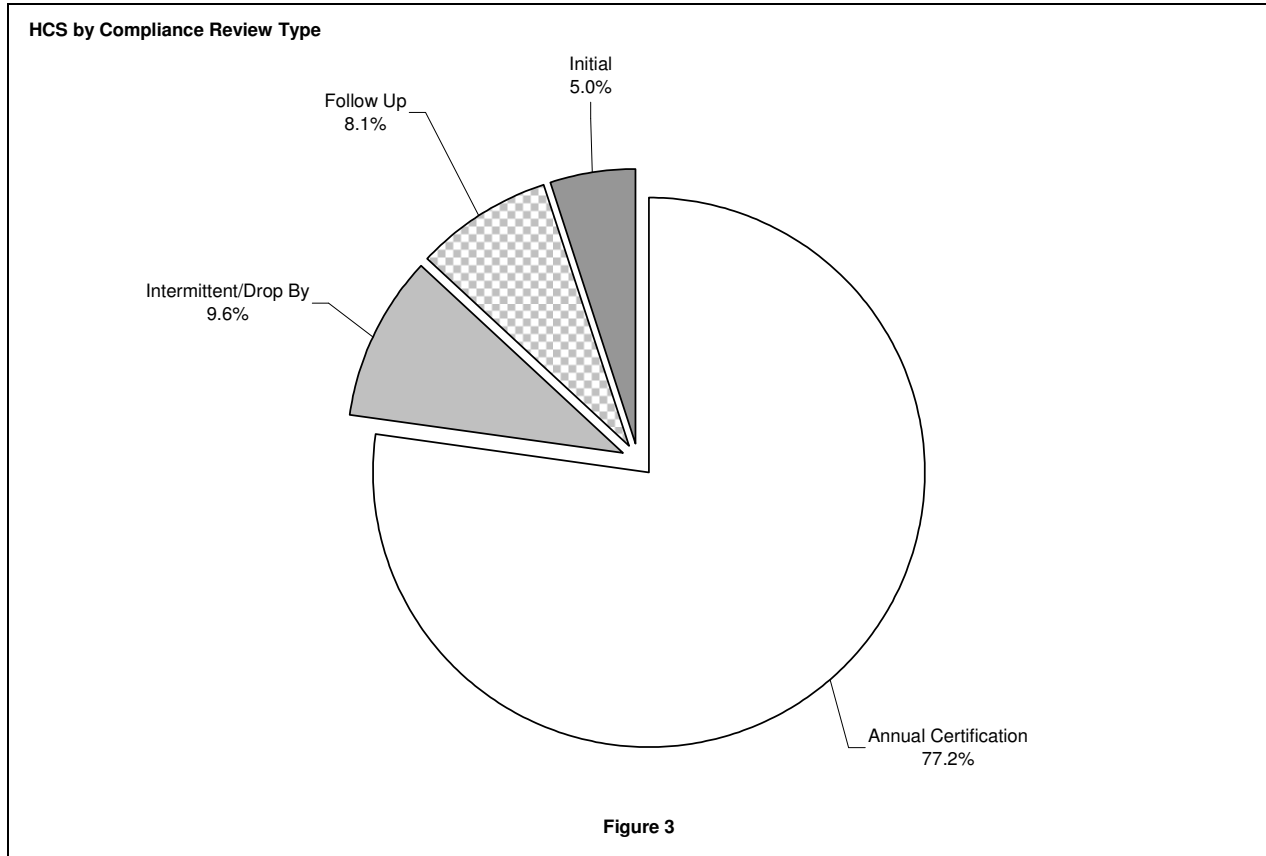
- Annual Certification   77.2%

- Intermittent/Drop By   9.6%

- Follow Up   8.1%

- Initial   5.0%

TxHmL

Previously, Figure 1 showed that TxHmL comprised nineteen (19.0%) percent of total surveyor time spent.

When calculating Compliance Review Types within TxHmL, Initial (54.1%) and Annual Certification (45.9%) encompass one-hundred (100%) percent of surveyor time.

The TxHmL program was established on 3/1/04 and commenced certification activity effective 9/21/04. As a new program, collected time samples were limited within two (2) Program Types (Initial and Annual Certification) during the inaugural year of the program.

Surveyors did not register time samples in Follow Up or Intermittent/Drop By, but this should change as the program matures.

Figure 4 provides the percentage of time spent on each Compliance Review Type within TxHmL.

TxHmL by Compliance Review Type

Annual Certification
45.9%

Initial
54.1%

Figure 4
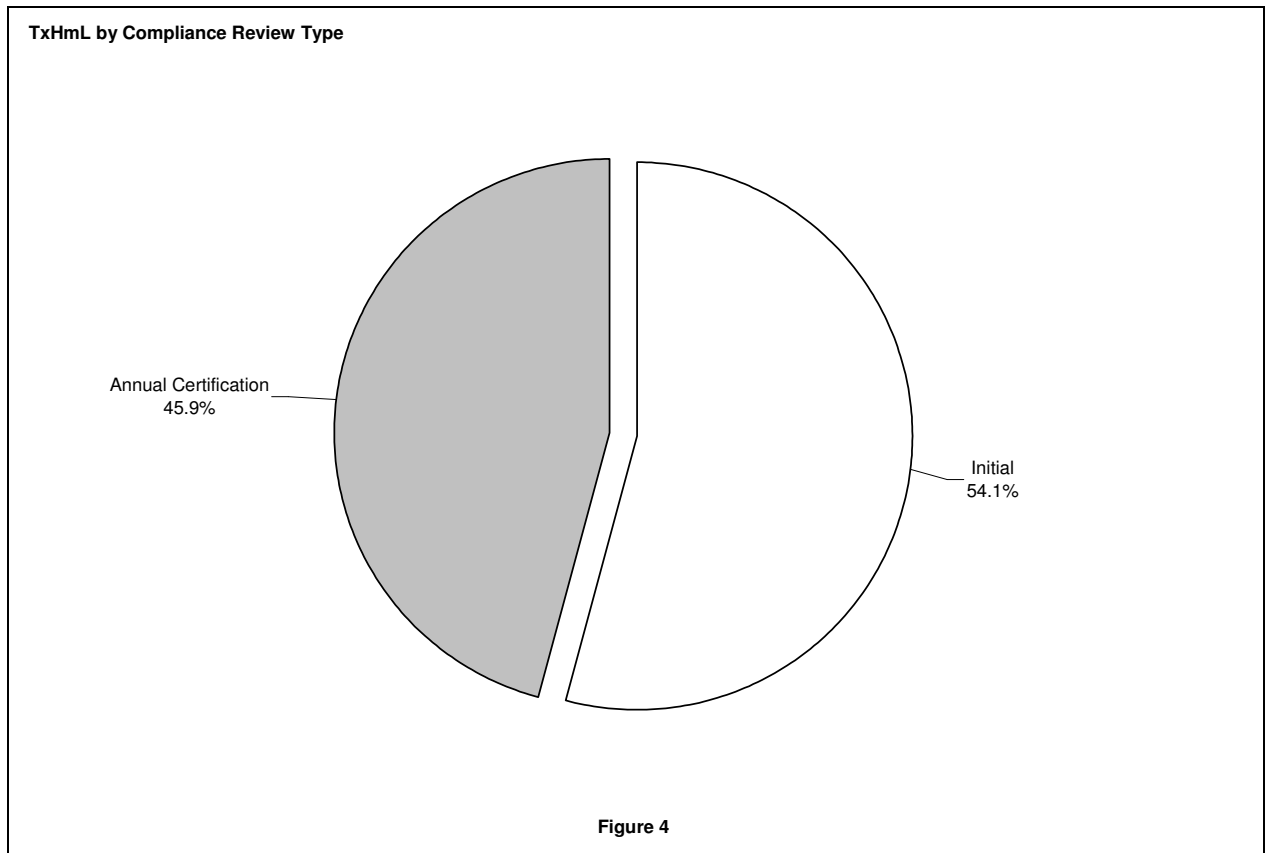
TxHmL

- Initial   54.1%

- Annual Certification   45.9%

Activity Type Defined

The PDA study instrument allowed an activity selection from a list of twelve (12) Activity Types:

- **Pre-survey Preparation**: Any activity (except trip planning & actual travel) related to a specific compliance review that occurs prior to the entrance conference.

- **Entrance**: A conference with provider or authority staff to state purpose of compliance review and to request information necessary to conduct the compliance review.

- **Record Review Information Gathering**: Information gathered through review of documented sources, such as consumer records, personnel records, contracts, committee meeting minutes, reports, electronic records, etc.

- **Observation Information Gathering**: Information gathered about the residents, environment, and physical plant (using the five senses). This could be a formal environmental compliance review and/or an impromptu discovery.

- **Interview with Paid Staff Information Gathering**: Information gathered through conversations with staff employed or contracted by the program provider or local authority.

- **Interview with Stakeholder Information Gathering**: Information gathered through conversations with individuals other than paid staff including consumers, LARs, family members, advocates, neighbors, etc.

- **Providing Information**: Preparing or disseminating information related to service delivery specific to HCS/TxHmL. Includes responding to inquiries and providing technical assistance.

- **Information Analysis**: Evaluating information gathered to determine compliance with certification or TxHmL authority requirements.

- **Debriefings/Exit Conference**: Conveying compliance review findings and recommendations.

- **Report Generation**: Completion of forms, reports, notes, or citations of the compliance review.

- **Travel**: Travel related to compliance review. Actual travel as well as walking to and from mode of transportation. Wait time at the airport.

- **Trip Planning & Post**: Planning trip (making hotel, car, plane reservations, printing map, etc.). Compiling trip receipts and submission for reimbursement.

Percentage of Time by Activity Type

Nearly a third (32.2%) of combined HCS and TxHmL compliance review time is spent by surveyors on Travel (28.4%) and Trip Planning & Post (3.8%).

Pre-survey Preparation (13.4%) and Report Generation (5.9%) comprise over nineteen (19.4%) percent of surveyor time.

Record Review Information Gathering (15.8%) and Information Analysis (10.2%) constitute the two highest survey-related activities.

On the following page, Figure 5 provides a summary of the percentages for all Compliance Review Types by Activity Type.

Percentage of Time by Activity Types

Activity Type	Percentage
Travel	28.4%
Record Rvw Info Gathering	15.8%
Presurvey Prep	13.4%
Information Analysis	10.2%
Debriefing/Exit Conference	6.9%
Report Generation	5.9%
Providing Information	4.5%
Interview w/Paid Staff Info Gathering	4.5%
Trip Planning & Post	3.8%
Observation Info Gathering	2.5%
Intv w/Stakeholder Info Gathering	2.4%
Entrance	1.8%

Figure 5

The following page provides analysis of the Activity Types depicted in Figure 5 by Functional Group, for Waiver Survey & Certification combined.

Functional Groups Defined

To facilitate the ensuing analysis, related Activity Types were divided into three (3) Functional Groups: Preparation and Reporting, Certification, and Travel-related.

The following table summarizes the functional groups:

Table-2	Activity Type
Preparation & Reporting	• Pre-survey Preparation • Report Generation
Certification	• Entrance • Record Review Information Gathering • Observation Information Gathering • Interview with Paid Staff Information Gathering • Interview w/Stakeholder Information Gathering • Providing Information • Information Analysis • Debriefings/Exit Conference
Travel-related	• Travel • Trip Planning & Post

The following pages provide analysis of Activity Types by Functional Group.

Percentage of Time by Functional Group

For all Compliance Review Types within Waiver Survey & Certification, Certification activities accounted for nearly forty-nine (48.5%) percent of time spent by surveyors. Preparation and Reporting activities entailed over nineteen (19.4%) percent and Travel-related activities over thirty-two (32.1%) percent.

Table-3	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	13.4%	19.4%
	Report Generation	5.9%	
Certification	Record Review Information Gathering	15.8%	48.5%
	Information Analysis	10.2%	
	Debriefing/Exit Conference	6.9%	
	Interview w/Paid Staff Information Gathering	4.5%	
	Providing Information	4.5%	
	Observation Information Gathering	2.5%	
	Interview w/Stakeholder Information Gathering	2.4%	
	Entrance	1.8%	
Travel-related	Travel	28.4%	32.1%
	Trip Planning & Post	3.8%	

*Totals may differ due to rounding.

Figure 6 depicts the percent of time in each Functional Group for Waiver Survey & Certification.

Percentage of Time by Functional Group

Preparation & Report 19.4%

Travel-related 32.1%

Certification 48.5%
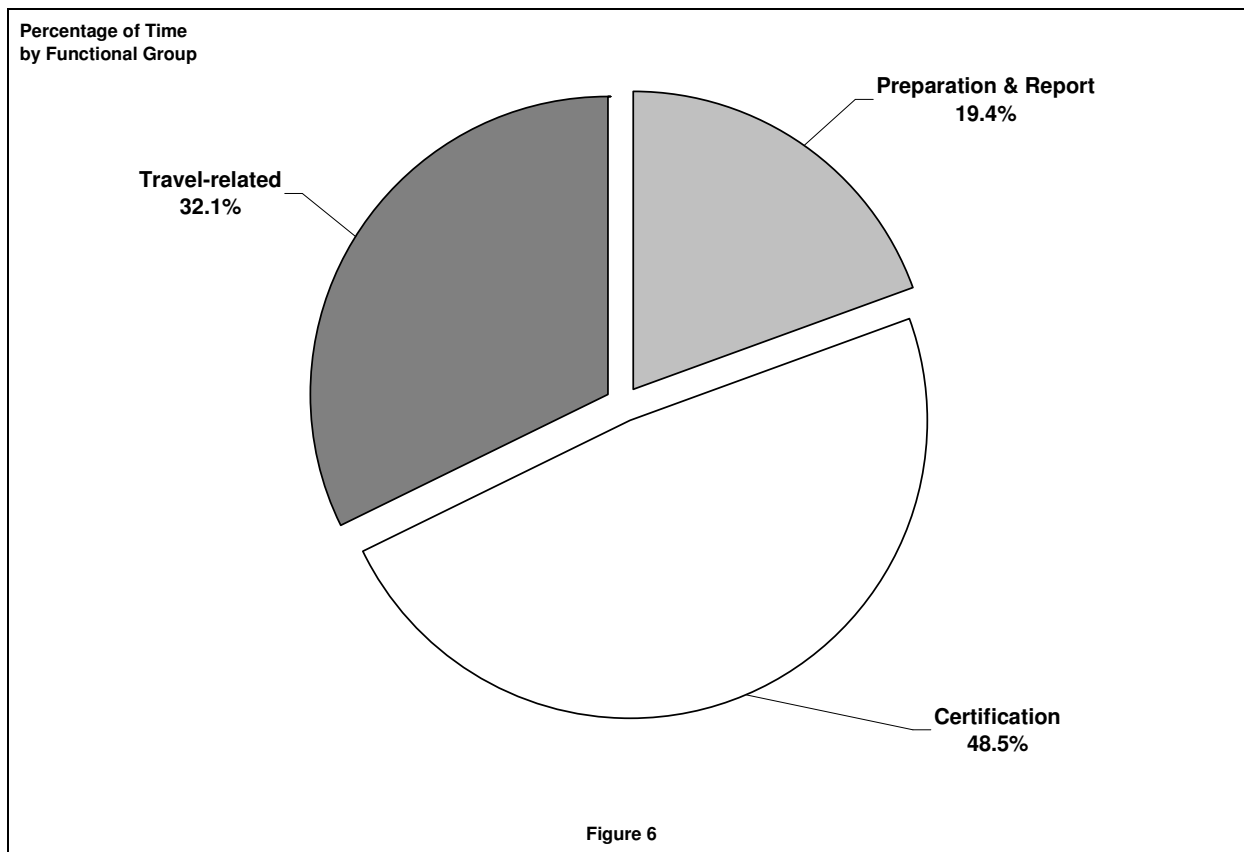
Figure 6

The following pages provide a comparison analysis of each individual Program Type.

Percentage of Time Comparison by Functional Group: Program Types

Previously, Figure 6 showed that the percentage of time spent in Activity Types for all combined Program Types/Compliance Review Types consisted of the following Functional Group breakdown:

- **Preparation and Reporting**: nineteen (19.4%) percent
- **Certification**: forty-nine (48.5%) percent
- **Travel-related**: thirty-two (32.1%) percent

When re-calculated for each Program Type, the division of time spent by surveyors on individual Activity Types within Functional Groups differs slightly from the combined Program Type percentages:

- Preparation and Reporting activities occupied significantly more surveyor time for TxHmL (25.7%) than HCS (17.3%).

- Certification activities accounted for significantly more surveyor time for HCS (51.55%) than TxHmL (39.3%).

- Travel-related percentages remained consistent across both Program Types, with HCS (31.2%) and TxHmL at (35.1%).

Figure 7 provides a comparison of the percentages in each Functional Group by Program Type.
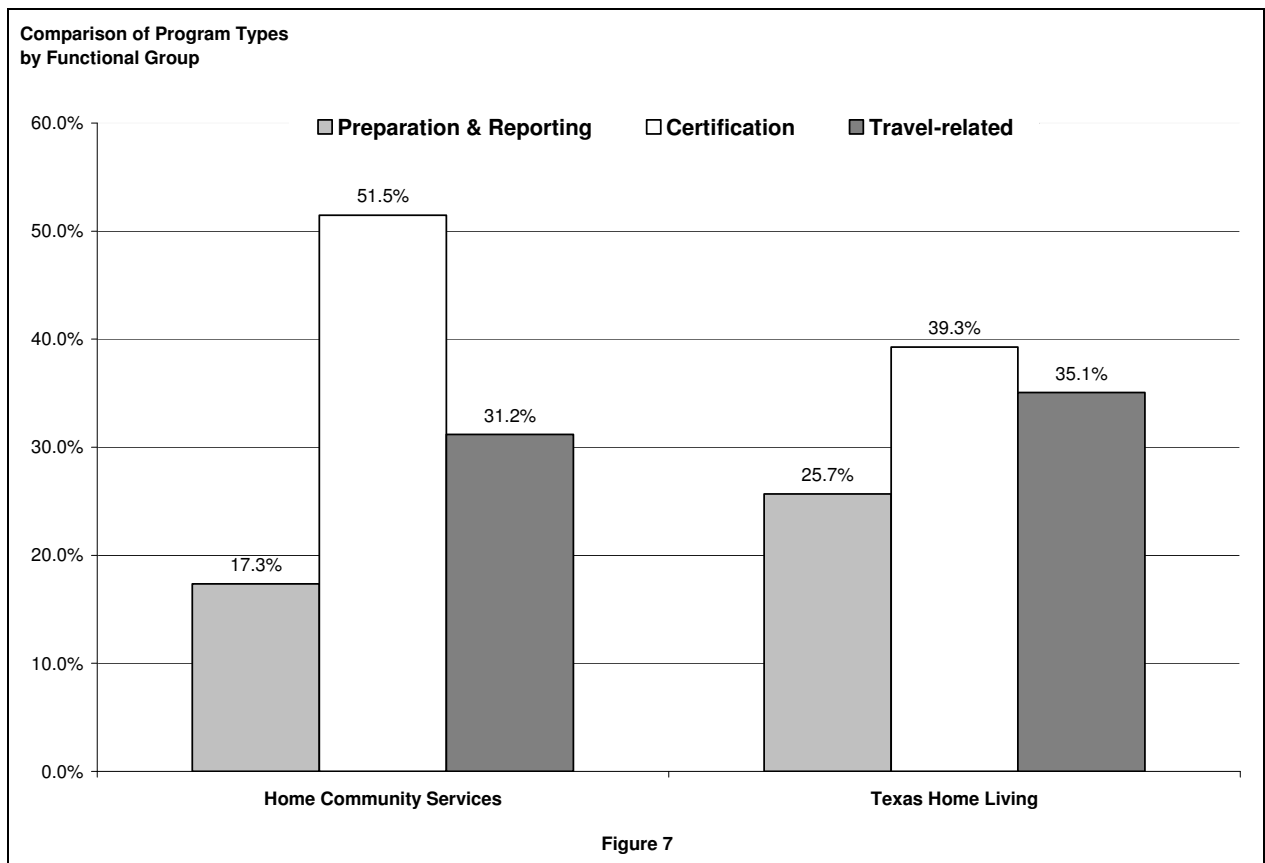
Figure 7

The following pages provide individual analysis of each Program Type depicted in Figure 7.

HCS

For Activity Types re-calculated within HCS, Certification activities accounted for nearly fifty-three (52.8%) percent of activities. Preparation and Reporting activities accounted for over seventeen (17.5%) percent. Travel-related activities accounted for nearly thirty (29.7%) percent.

Table-4	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	12.1%	17.5%
	Report Generation	5.3%	
Certification	Record Review Information Gathering	17.6%	52.8%
	Information Analysis	11.5%	
	Debriefing/Exit Conference	7.5%	
	Interview w/Paid Staff Information Gathering	4.9%	
	Providing Information	4.6%	
	Observation Information Gathering	3.1%	
	Interview w/Stakeholder Information Gathering	2.1%	
	Entrance	1.7%	
Travel-related	Travel	25.0%	29.7%
	Trip Planning & Post	4.7%	

*Totals may differ due to rounding.

Figure 8 provides the percentage of time spent in each Functional Group within HCS.

HCS by Functional Group

Preparation & Reporting 17.5%

Travel-related 29.7%

Certification 52.8%

Figure 8
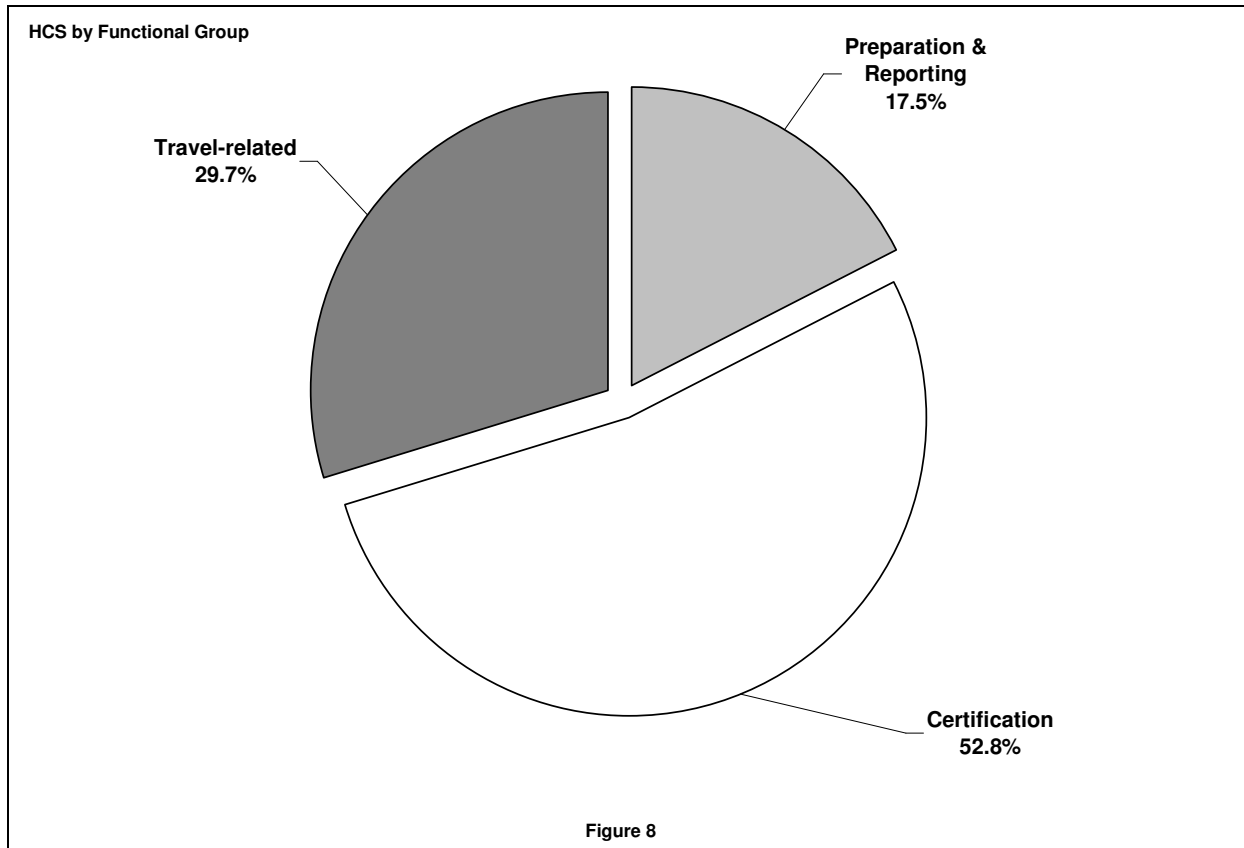
TxHmL

For Activity Types re-calculated within TxHmL, Certification activities encompassed over thirty-nine (39.3%) percent of surveyor time. Preparation and Reporting accounted for approximately twenty-six (25.7%) percent, and Travel-related activities over thirty-five (35.1%).

Table-5	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	20.0%	25.7%
	Report Generation	5.6%	
Certification	Record Review Information Gathering	10.5%	39.3%
	Information Analysis	7.7%	
	Interview w/Stakeholder Information Gathering	5.9%	
	Debriefing/Exit Conference	5.9%	
	Interview w/Paid Staff Information Gathering	3.6%	
	Providing Information	3.1%	
	Entrance	1.9%	
	Observation Information Gathering	0.6%	
Travel-related	Travel	33.3%	35.1%
	Trip Planning & Post	1.7%	

*Totals may differ due to rounding.

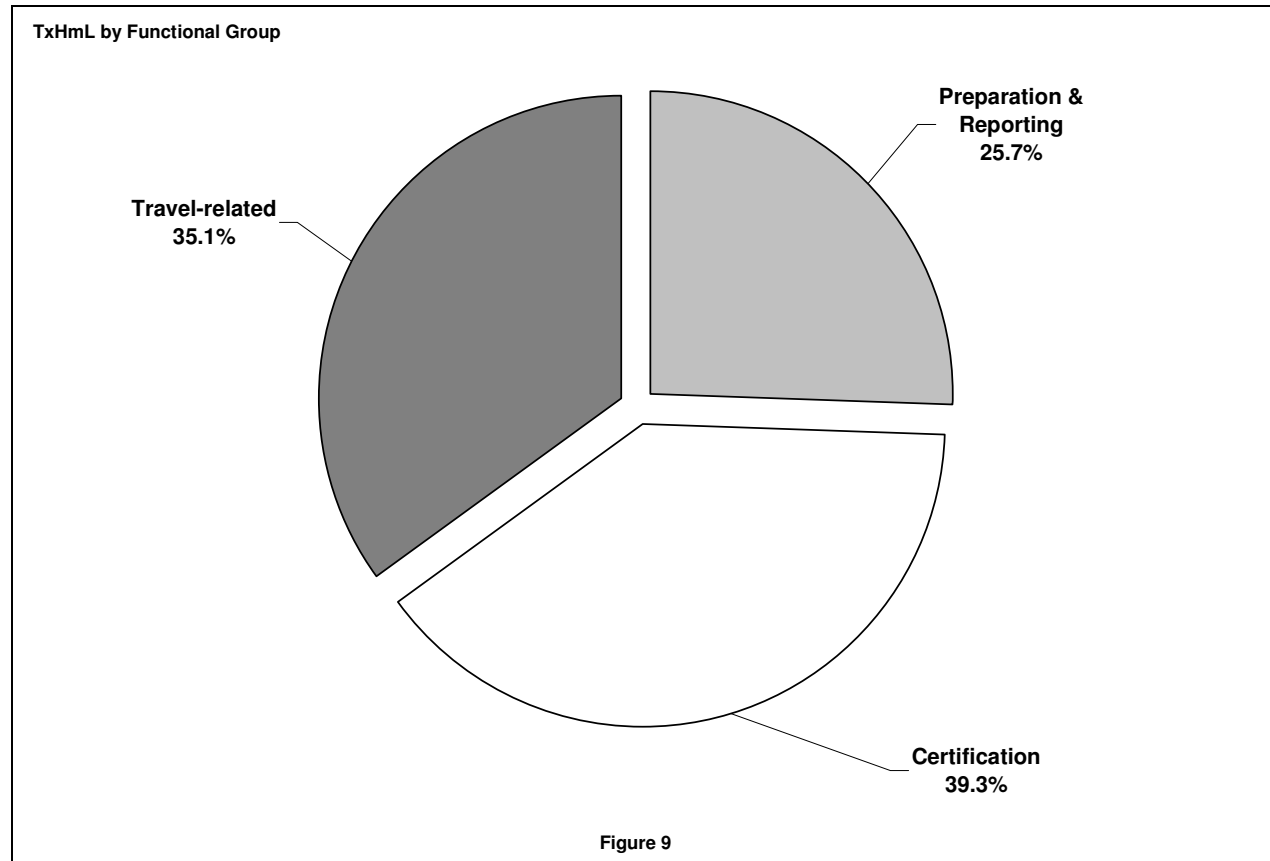Figure 9 depicts the percentage of time for each Functional Group within TxHmL.

TxHmL by Functional Group

Preparation & Reporting 25.7%

Travel-related 35.1%

Certification 39.3%

Figure 9

Percentage of Time Comparison by Functional Group: Compliance Review Types

Previously, Figure 6 showed that the percentage of time spent in Activity Types for all combined Program Types consisted of the following Functional Group breakdown:

- **Preparation and Reporting**: nineteen (19.4%) percent
- **Certification**: forty-nine (48.5%) percent
- **Travel-related**: thirty-two (32.1%) percent

When calculated within each Compliance Review Type, the division of time spent by surveyors within Activity Types differs slightly from combined Program Type percentages:

- Preparation and Reporting activities ranged from a high in Intermittent/Drop By (30.6%) to a low in Annual Certification (17.5%).

- Certification activities ranged from a high in Annual Certification (52.6%) to a low in Intermittent/Drop By (26.9%).

- Travel-related percentages ranged from a low in Annual Certification (29.9%) to a high in Intermittent/Drop By (42.5%).

Figure 10 provides a comparison of percentages within Functional Groups by Compliance Review Type.
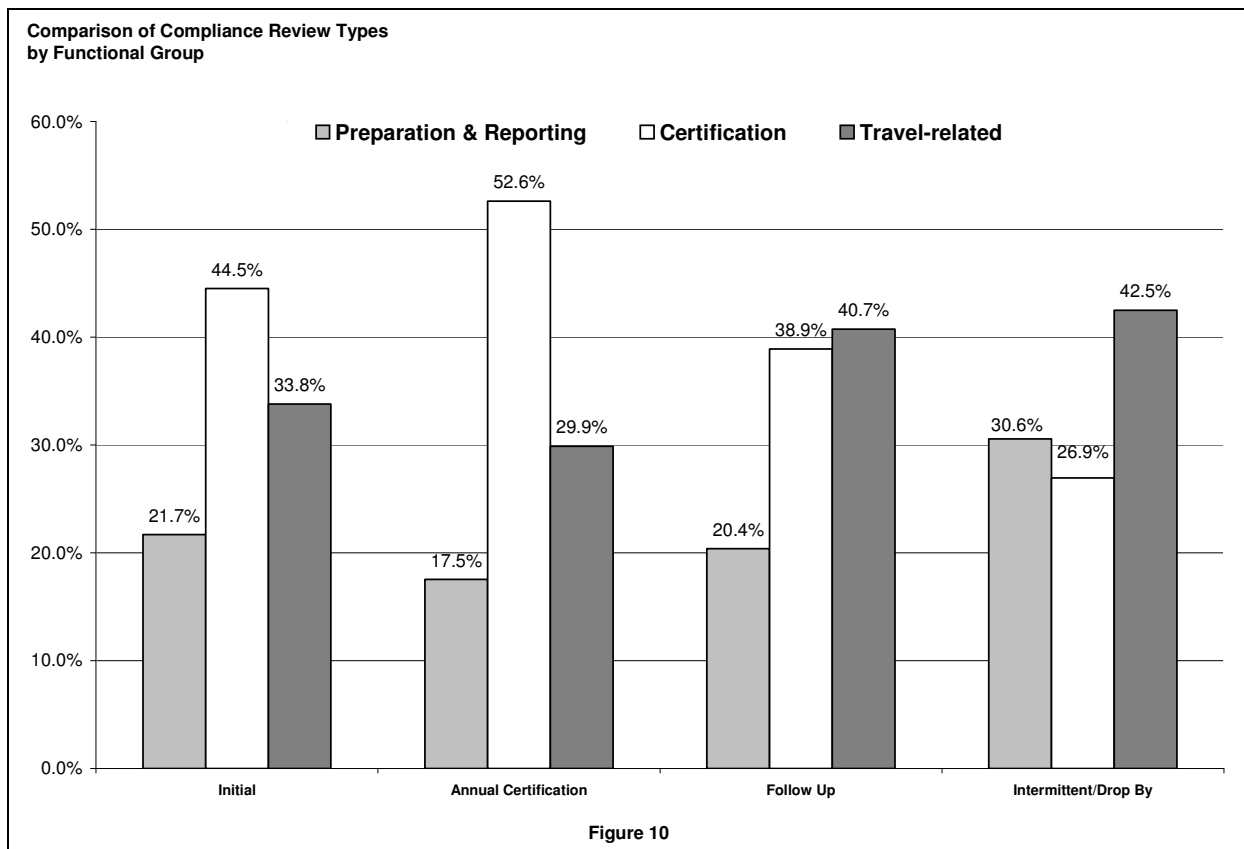
Figure 10

The following pages provide individual analysis of each Compliance Review Type depicted in Figure 9.

Initial

For an Initial, Travel (33.3%) and Trip Planning & Post (0.4%) travel-related activities accounted for nearly thirty-four (33.8%) percent of time spent by surveyors.

Table-6	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	16.1%	21.7%
	Report Generation	5.6%	
Certification	Record Review Information Gathering	12.3%	44.5%
	Debriefing/Exit Conference	8.7%	
	Information Analysis	8.1%	
	Providing Information	5.4%	
	Interview w/Paid Staff Information Gathering	3.6%	
	Interview w/Stakeholder Information Gathering	2.9%	
	Entrance	2.5%	
	Observation Information Gathering	1.1%	
Travel-related	Travel	33.3%	33.8%
	Trip Planning & Post	0.4%	

*Totals may differ due to rounding.

Figure 11 provides percentages by Functional Group for Activity Types within an Initial.

Initial by Functional Group

Preparation & Reporting 21.7%

Travel-related 33.8%

Certification 44.5%

Figure 11

Annual Certification

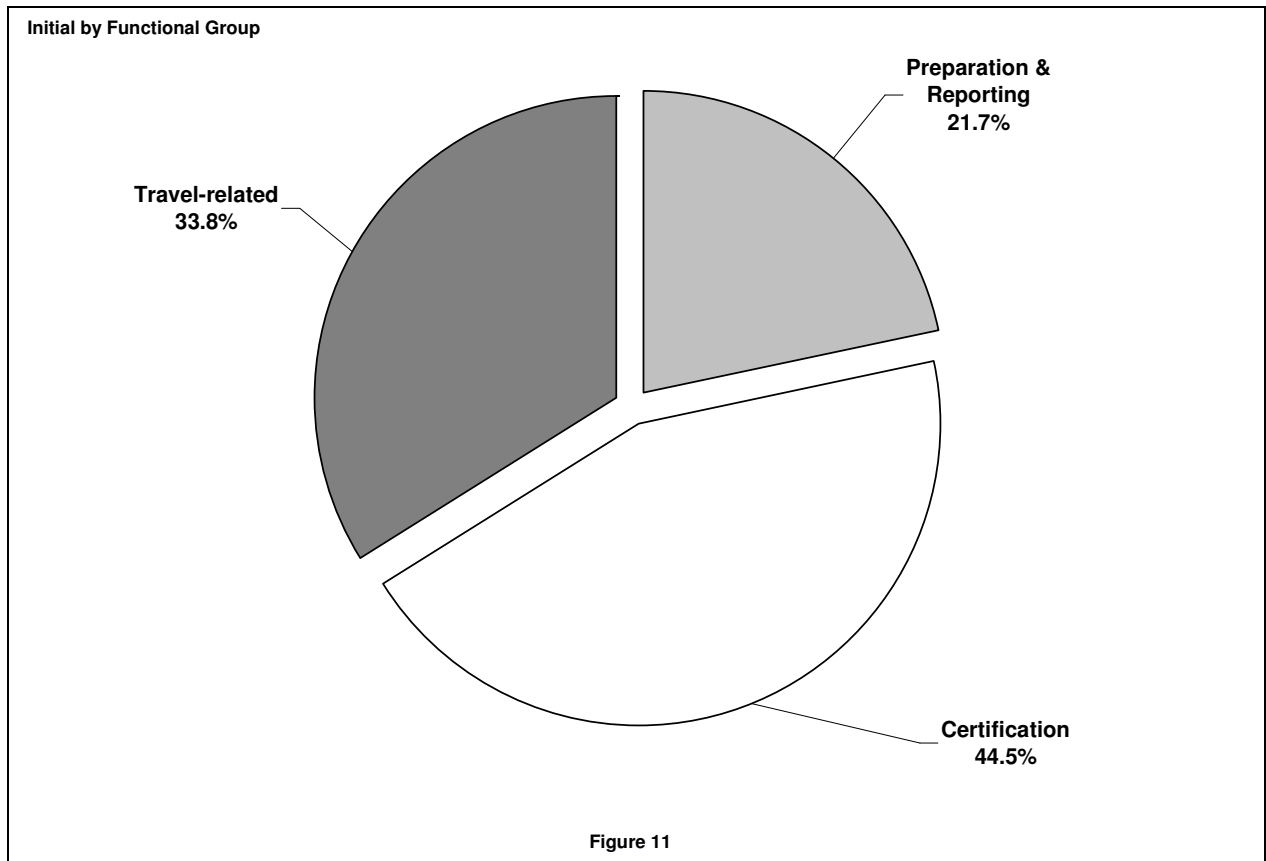For an Annual Certification, Travel (25.4%) and Trip Planning & Post (4.5%) travel-related activities accounted for nearly thirty (29.9%) percent of time spent by surveyors.

Table-7	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	12.0%	17.5%
	Report Generation	5.5%	
Certification	Record Review Information Gathering	17.5%	52.6%
	Information Analysis	11.3%	
	Debriefing/Exit Conference	7.1%	
	Interview w/Paid Staff Information Gathering	5.1%	
	Providing Information	4.6%	
	Observation Information Gathering	3.2%	
	Interview w/Stakeholder Information Gathering	2.2%	
	Entrance	1.6%	
Travel-related	Travel	25.4%	29.9%
	Trip Planning & Post	4.5%	

*Totals may differ due to rounding.

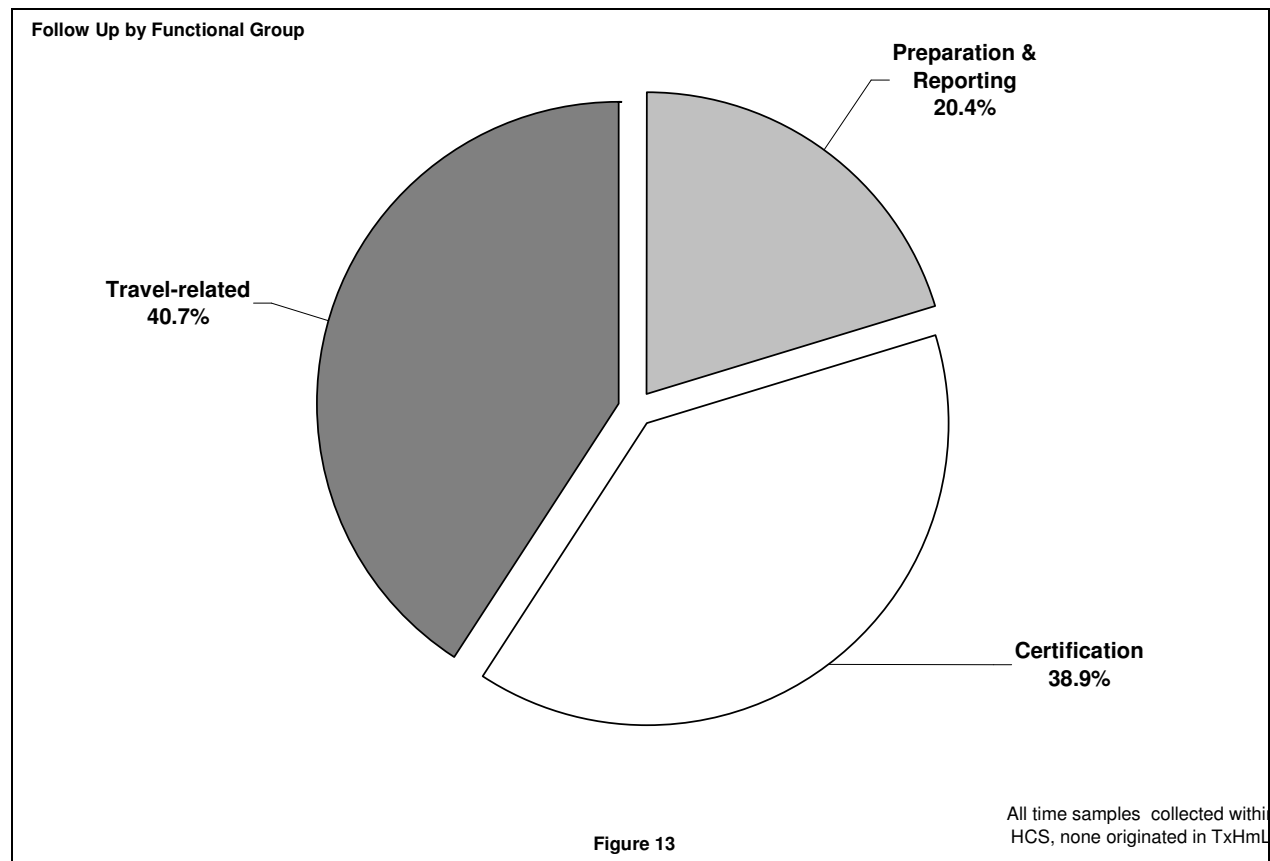Figure 12 provides percentages by Functional Group for Activity Types within an Annual Certification.

Annual Certification by Functional Group

Preparation & Reporting 17.5%

Travel-related 29.9%

Certification 52.6%

Figure 12

20
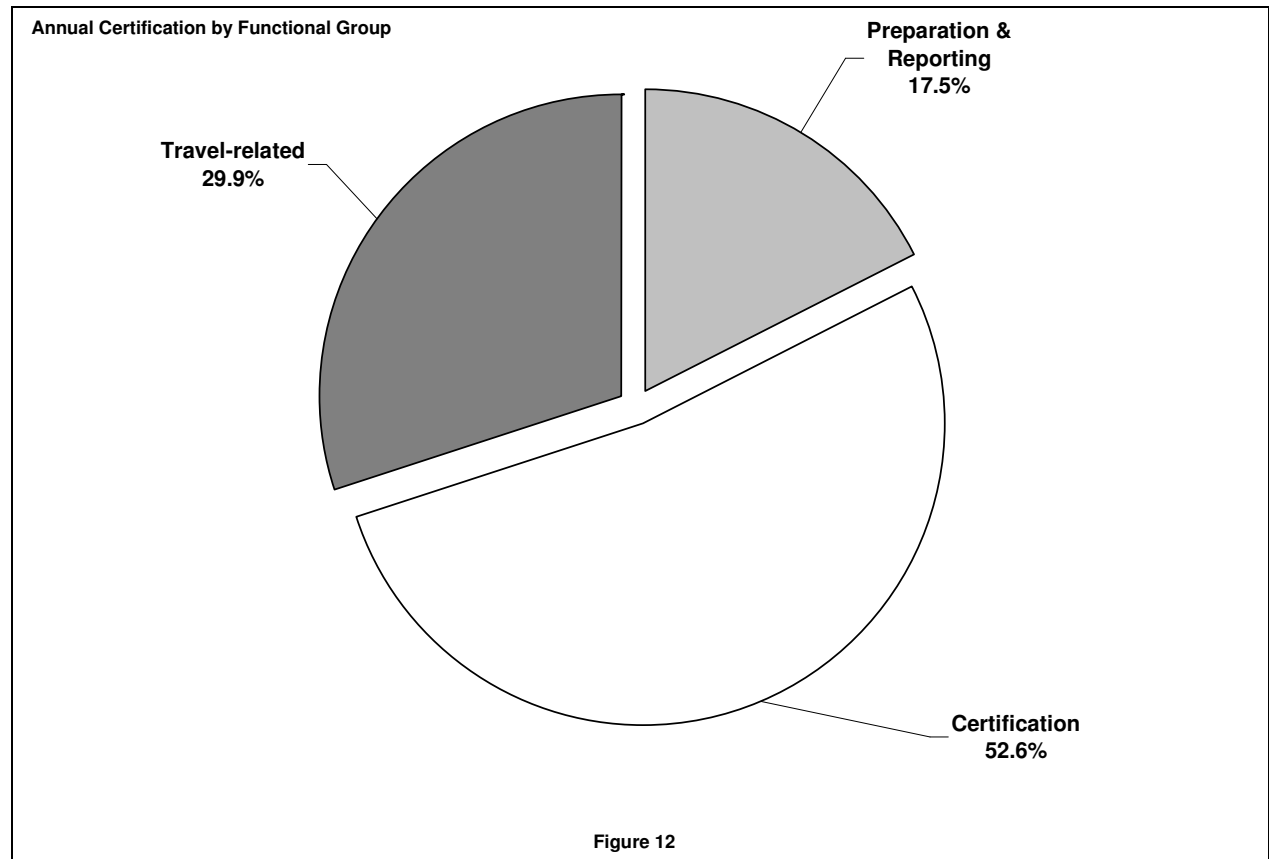
Follow Up

For a Follow Up, Travel (37.0%) and Trip Planning & Post (3.7%) travel-related activities accounted for nearly forty-one (40.7%) percent of surveyor time.

Table-8	Activity Type	Percent*	Total*
Preparation & Reporting	Report Generation	12.3%	20.4%
	Pre-survey Preparation	8.0%	
Certification	Record Review Information Gathering	17.9%	38.9%
	Information Analysis	6.2%	
	Debriefing/Exit Conference	4.3%	
	Providing Information	3.1%	
	Entrance	3.1%	
	Interview w/Paid Staff Information Gathering	1.9%	
	Interview w/Stakeholder Information Gathering	1.9%	
	Observation Information Gathering	0.6%	
Travel-related	Travel	37.0%	40.7%
	Trip Planning & Post	3.7%	

*Totals may differ due to rounding.

Figure 13 provides percentages by Functional Group for Activity Types within a Follow Up.
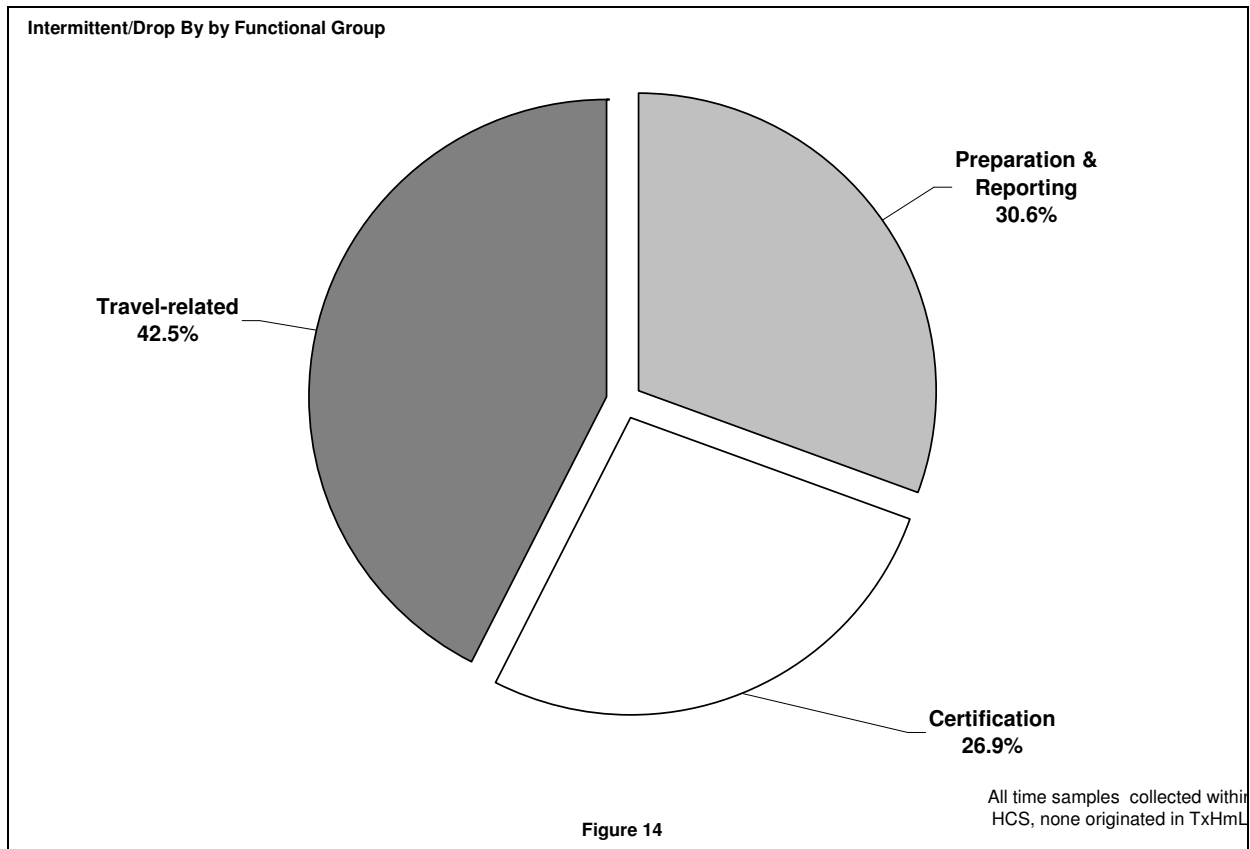

Follow Up by Functional Group

Preparation & Reporting 20.4%

Travel-related 40.7%

Certification 38.9%

All time samples collected withi
HCS, none originated in TxHmL

Figure 13

Intermittent/Drop By

For an Intermittent/Drop By, Travel (38.3%) and Trip Planning & Post (4.1%) travel-related activities accounted for nearly forty-three (42.5%) percent of time spent by surveyors.

Table-9	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	25.9%	30.6%
	Report Generation	4.7%	
Certification	Information Analysis	7.3%	26.9%
	Record Review Information Gathering	5.7%	
	Interview w/Paid Staff Information Gathering	3.6%	
	Interview w/Stakeholder Information Gathering	3.6%	
	Providing Information	3.1%	
	Debriefing/Exit Conference	2.1%	
	Entrance	1.0%	
	Observation Information Gathering	0.5%	
Travel-related	Travel	38.3%	42.5%
	Trip Planning & Post	4.1%	

*Totals may differ due to rounding.

Figure 14 provides percentages by Functional Group for Activity Types within an Intermittent/Drop By.

Intermittent/Drop By by Functional Group

Preparation & Reporting 30.6%

Travel-related 42.5%

Certification 26.9%

All time samples collected within HCS, none originated in TxHmL
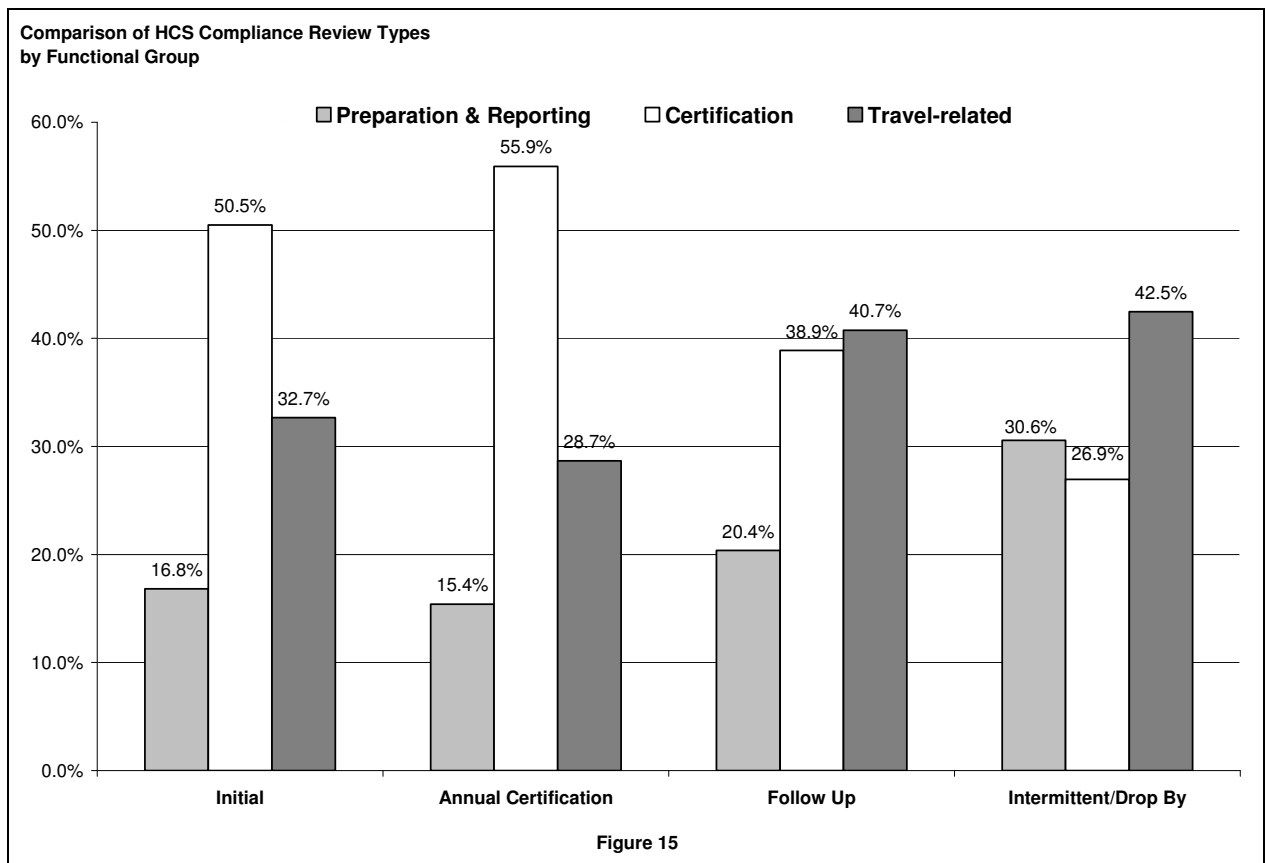
Figure 14

The following pages give Functional Group analysis of Compliance Review Types for HCS and TxHmL.

Percentage of Time Comparison by Functional Group: HCS

When calculated within HCS, Compliance Review Types show the following:

- Preparation and Reporting activities ranged from a low in Initial (16.8%) to a high in Intermittent/Drop Bys (30.6%).

- Certification activities comprised a low in Intermittent/Drop Bys (26.9%) to a high in (Annual Certification (55.9%).

- Travel-related activities varied from a low in Annual Certification (28.7%) to a high in Intermittent/Drop Bys (42.5%).

- Less than half of surveyor time is spent in Certification activities for Follow Up (38.9%) and Intermittent/Drop By (26.9%).

Figure 15 provides a comparison of HCS Compliance Review Types by Functional Group.

Comparison of HCS Compliance Review Types by Functional Group

Figure 15

The following pages provide Functional Group analysis for each HCS Compliance Review Type depicted in Figure 15.
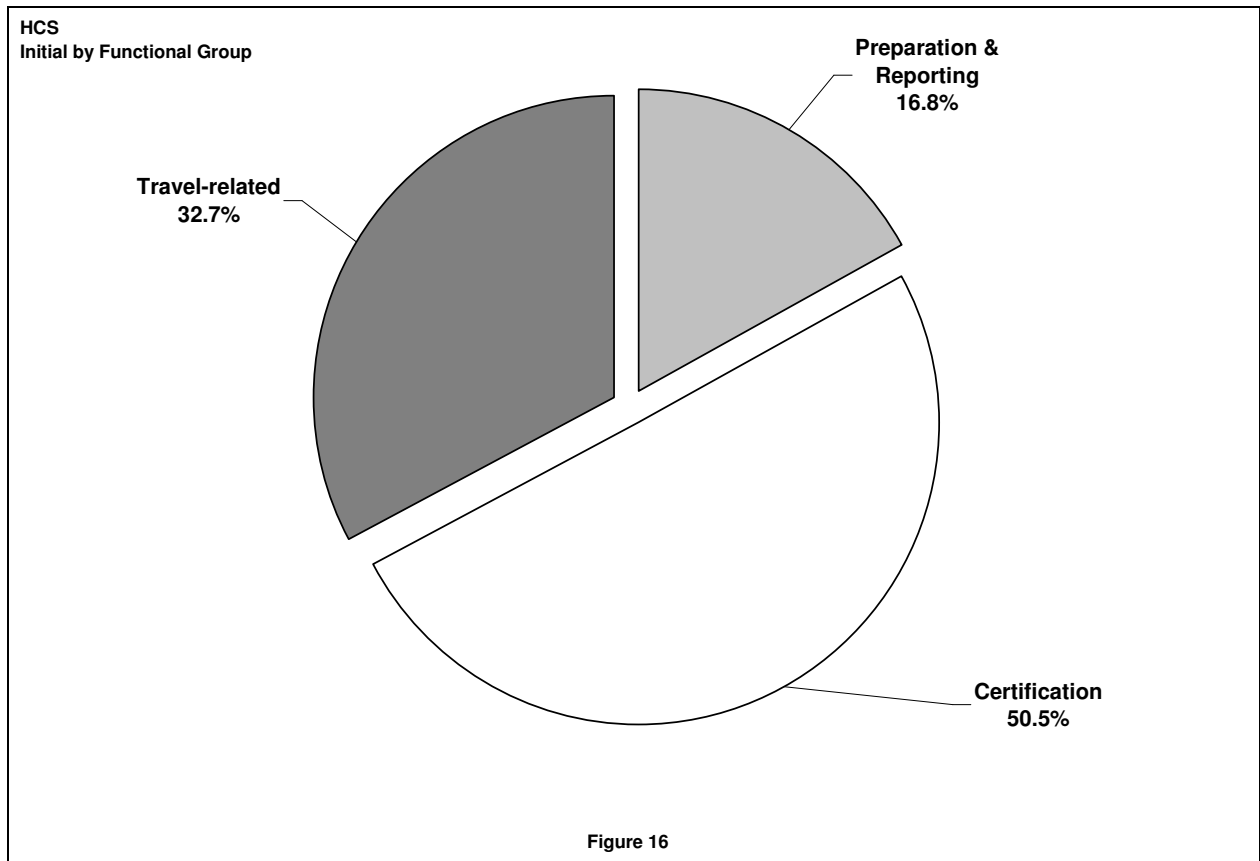
HCS: Initial

Travel (30.7%) and Trip Planning & Post (2.0%) comprise nearly thirty-three (32.7%) percent of surveyor time for a HCS Initial.

Table-10	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	13.9%	16.8%
	Report Generation	3.0%	
Certification	Record Review Information Gathering	16.8%	50.5%
	Debriefing/Exit Conference	12.9%	
	Providing Information	9.9%	
	Information Analysis	4.0%	
	Observation Information Gathering	3.0%	
	Entrance	2.0%	
	Interview w/Stakeholder Information Gathering	1.0%	
	Interview w/Paid Staff Information Gathering	1.0%	
Travel-related	Travel	30.7%	32.7%
	Trip Planning & Post	2.0%	

*Totals may differ due to rounding.

Figure 16 depicts the percentage of surveyor time spent in Functional Groups for a HCS Initial.


**HCS
Initial by Functional Group**

**Preparation & Reporting
16.8%**

**Travel-related
32.7%**

**Certification
50.5%**

Figure 16

HCS: Annual Certification

Travel (24.0%) and Trip Planning & Post (4.7%) comprise nearly twenty-nine (28.7%) percent of surveyor time for a HCS Annual Certification.

Table-11	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	9.7%	15.4%
	Report Generation	5.7%	
Certification	Record Review Information Gathering	18.9%	55.9%
	Information Analysis	12.4%	
	Debriefing/Exit Conference	7.7%	
	Interview w/Paid Staff Information Gathering	5.6%	
	Providing Information	5.1%	
	Observation Information Gathering	3.6%	
	Entrance	1.7%	
	Interview w/Stakeholder Information Gathering	0.9%	
Travel-related	Travel	24.0%	28.7%
	Trip Planning & Post	4.7%	

*Totals may differ due to rounding.

Figure 17 depicts the time surveyors spent within each Functional Group for a HCS Annual Certification.


HCS Annual Certification by Functional Group

Travel-related 28.7%

Preparation & Reporting 15.4%

Certification 55.9%

Figure 17
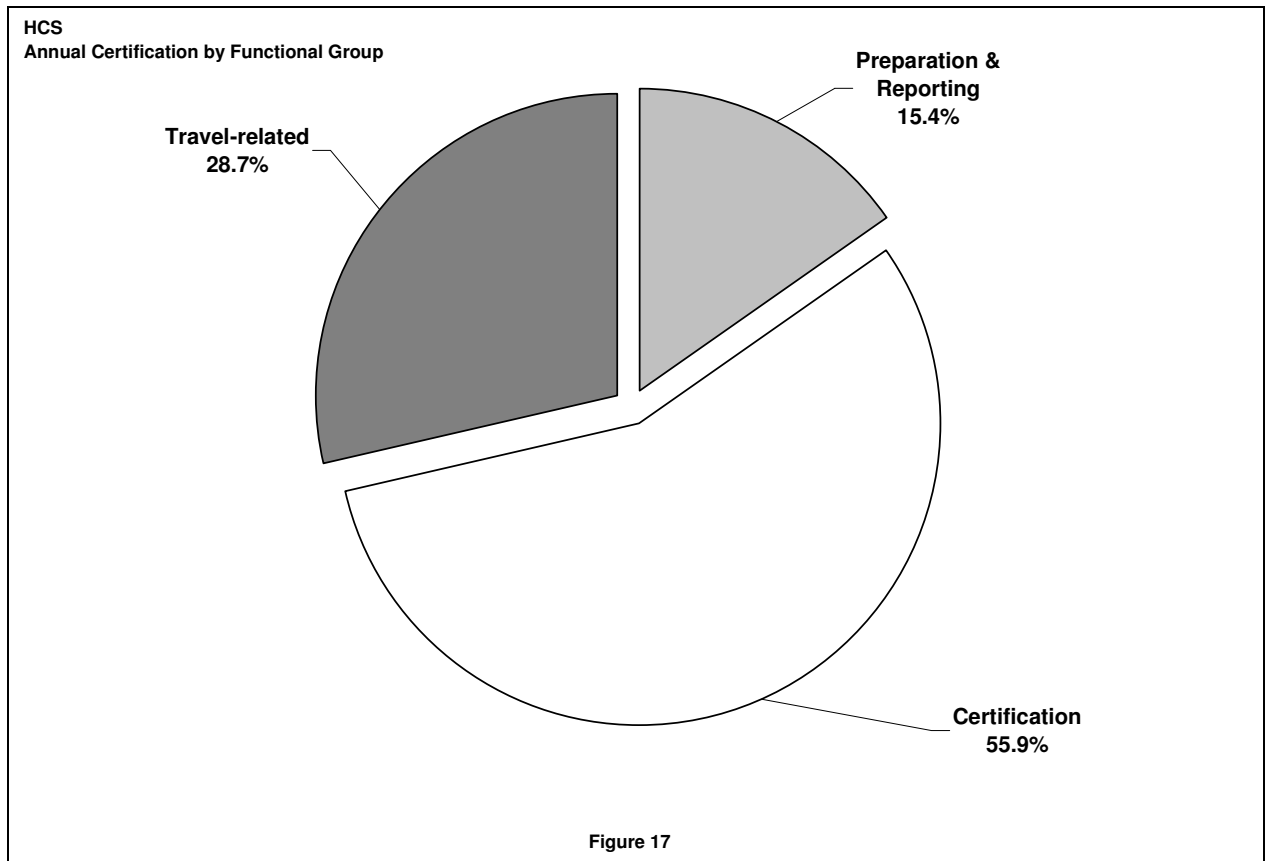
HCS: Follow Up

Travel (37.7%) and Trip Planning & Post (3.7%) encompass nearly forty-one (40.7%) percent of surveyor time for a HCS Follow Up.

Table-12	Activity Type	Percent*	Total*
Preparation & Reporting	Report Generation	12.3%	20.4%
	Pre-survey Preparation	8.0%	
Certification	Record Review Information Gathering	17.9%	38.9%
	Information Analysis	6.2%	
	Debriefing/Exit Conference	4.3%	
	Providing Information	3.1%	
	Entrance	3.1%	
	Interview w/Paid Staff Information Gathering	1.9%	
	Interview w/Stakeholder Information Gathering	1.9%	
	Observation Information Gathering	0.6%	
Travel-related	Travel	37.0%	40.7%
	Trip Planning & Post	3.7%	

*Totals may differ due to rounding.

Figure 18 depicts the percent of time surveyors spend in Functional Groups for a HCS Follow Up.

**HCS
Follow Up by Functional Group**

Preparation & Reporting 20.4%

Travel-related 40.7%

Certification 38.9%

Figure 18
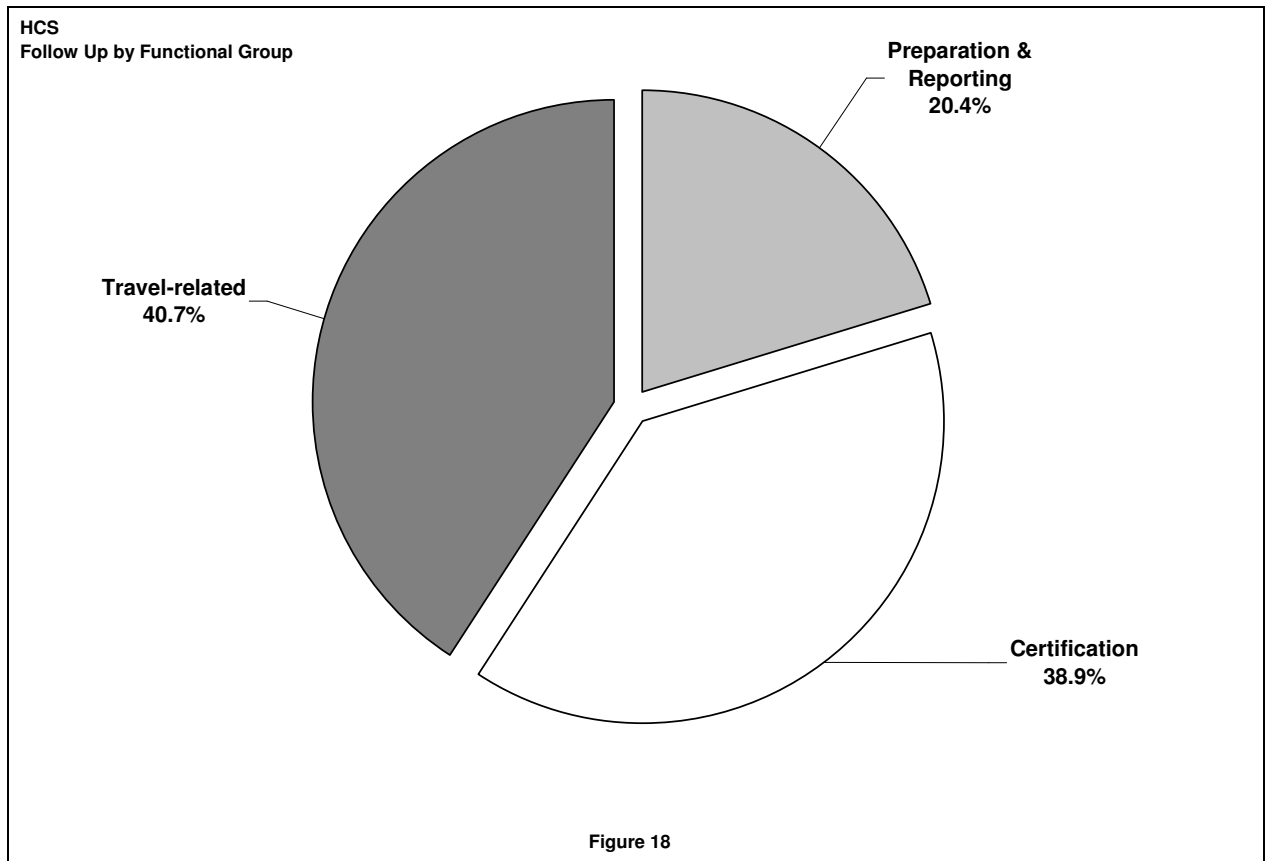
HCS: Intermittent/Drop By

Travel (38.3%) and Trip Planning & Post (4.1%) encompass nearly forty-three (42.5%) percent of surveyor time for a HCS Intermittent/Drop By.

Table-13	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	25.9%	30.6%
	Report Generation	4.7%	
Certification	Information Analysis	7.3%	26.9%
	Record Review Information Gathering	5.7%	
	Interview w/Paid Staff Information Gathering	3.6%	
	Interview w/Stakeholder Information Gathering	3.6%	
	Providing Information	3.1%	
	Debriefing/Exit Conference	2.1%	
	Entrance	1.0%	
	Observation Information Gathering	0.5%	
Travel-related	Travel	38.3%	42.5%
	Trip Planning & Post	4.1%	

*Totals may differ due to rounding.

Figure 19 depicts the percent of time spent in Functional Group activities for a HCS Intermittent/Drop By.


HCS Intermittent/Drop By by Functional Group

Preparation & Reporting 30.6%

Travel-related 42.5%

Certification 26.9%

Figure 19
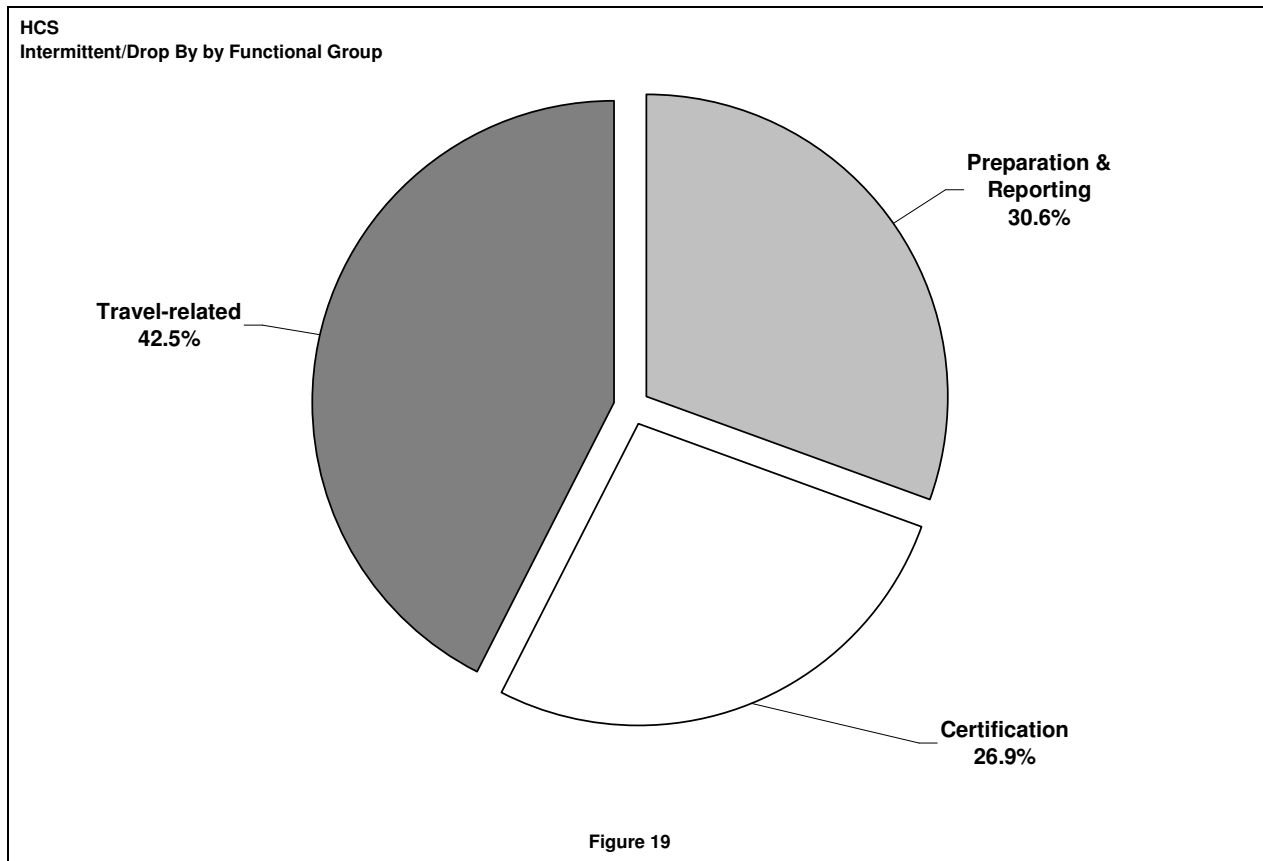
Percentage of Time Comparison by Functional Group: TxHmL

When re-calculating Compliance Review Types within TxHmL, Functional Group breakdowns reveal the following:

- Preparation and Reporting activities were highest for Annual Certification (28.7%) and lowest for Initial (23.1%).

- Certification activities were higher for Initial (42.8%) than Annual Certification (35.2%).

- Travel-related activities were similar for Initial (34.1%) and Annual Certification (36.2%).

- Less than half of surveyor time was spent in Certification activities for Initial (42.8%) and Annual Certification (35.2%).

Figure 20 depicts a comparison of TxHmL Compliance Review Types by Functional Group.

Comparison of TxHmL Compliance Review Types by Functional Group
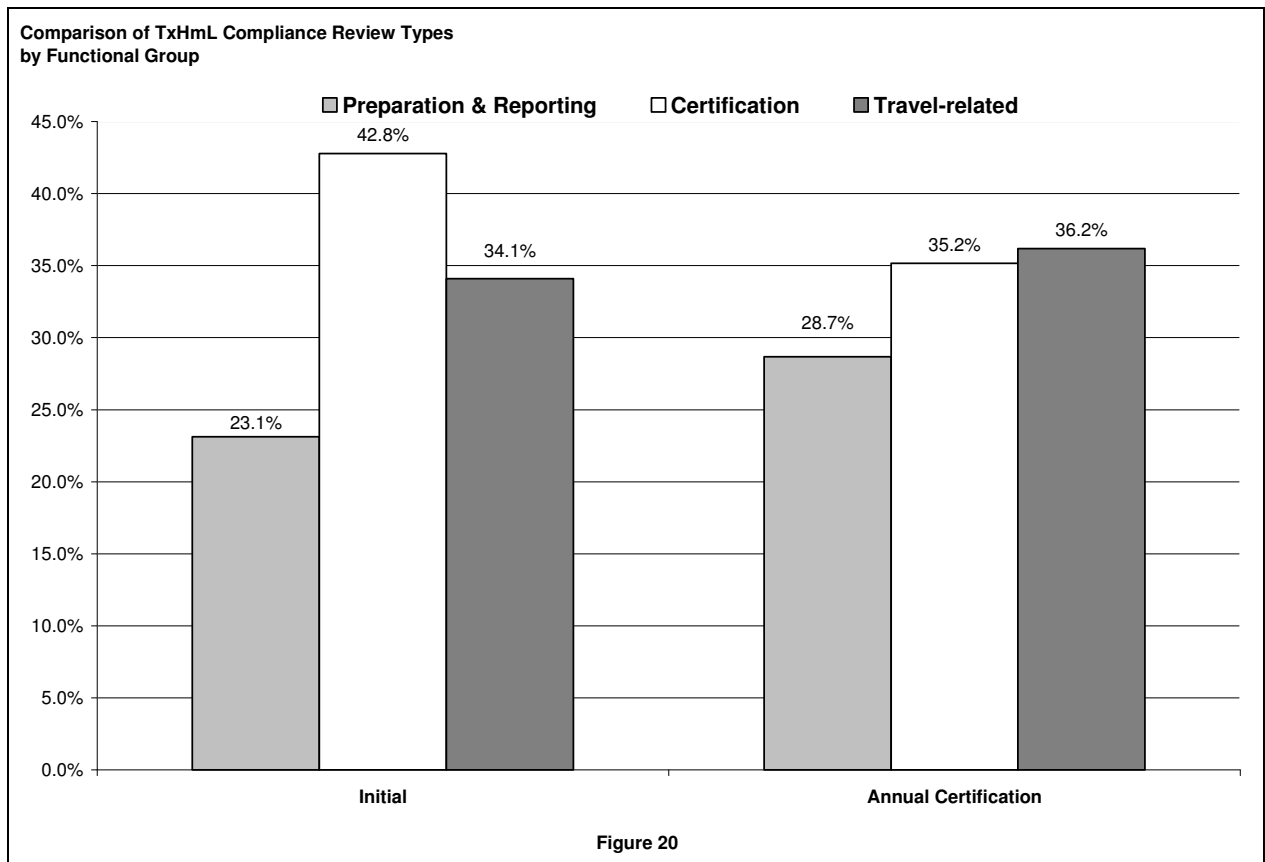
Figure 20

The following pages provide individual analysis of each TxHmL Compliance Review Type by Functional Group shown in Figure 20.
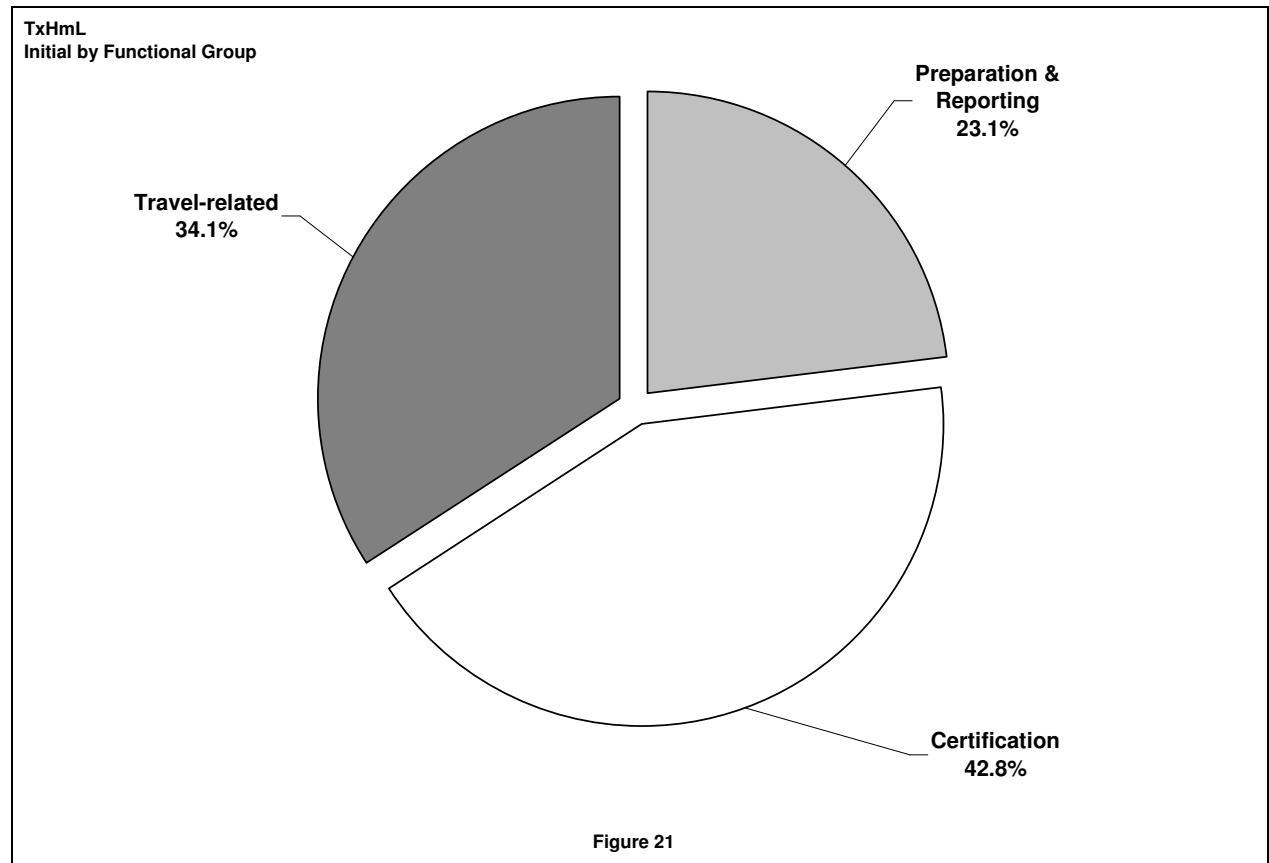
TxHmL: Initial

Travel encompasses over thirty-four (34.1%) percent of surveyor time for a TxHmL Initial.

Table-14	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	16.8%	23.1%
	Report Generation	6.4%	
Certification	Record Review Information Gathering	11.0%	42.8%
	Information Analysis	9.2%	
	Debriefing/Exit Conference	7.5%	
	Interview w/Paid Staff Information Gathering	4.3%	
	Providing Information	4.0%	
	Interview w/Stakeholder Information Gathering	3.5%	
	Entrance	2.6%	
	Observation Information Gathering	0.6%	
Travel-related	Travel	34.1%	34.1%
	Trip Planning & Post	0.0%	

*Totals may differ due to rounding.

Figure 21 shows the percent of time within Functional Groups for a TxHmL Initial.

TxHmL
Initial by Functional Group

Preparation & Reporting 23.1%

Travel-related 34.1%

Certification 42.8%

Figure 21

TxHmL: Annual Certification

Travel (32.4%) and Trip Planning & Post (3.8%) encompass over thirty-six (36.2%) percent of surveyor time for a TxHmL Annual Certification.

Table-15	Activity Type	Percent*	Total*
Preparation & Reporting	Pre-survey Preparation	23.9%	28.7%
	Report Generation	4.8%	
Certification	Record Review Information Gathering	9.9%	35.2%
	Interview w/Stakeholder Information Gathering	8.9%	
	Information Analysis	5.8%	
	Debriefing/Exit Conference	4.1%	
	Interview w/Paid Staff Information Gathering	2.7%	
	Providing Information	2.0%	
	Entrance	1.0%	
	Observation Information Gathering	0.7%	
Travel-related	Travel	32.4%	36.2%
	Trip Planning & Post	3.8%	

*Totals may differ due to rounding.

Figure 22 shows the time spent within Functional Group activities for a TxHmL Annual Certification.

TxHmL
Annual Certification by Functional Group

Preparation & Reporting 28.7%

Travel-related 36.2%

Certification 35.2%

Figure 22
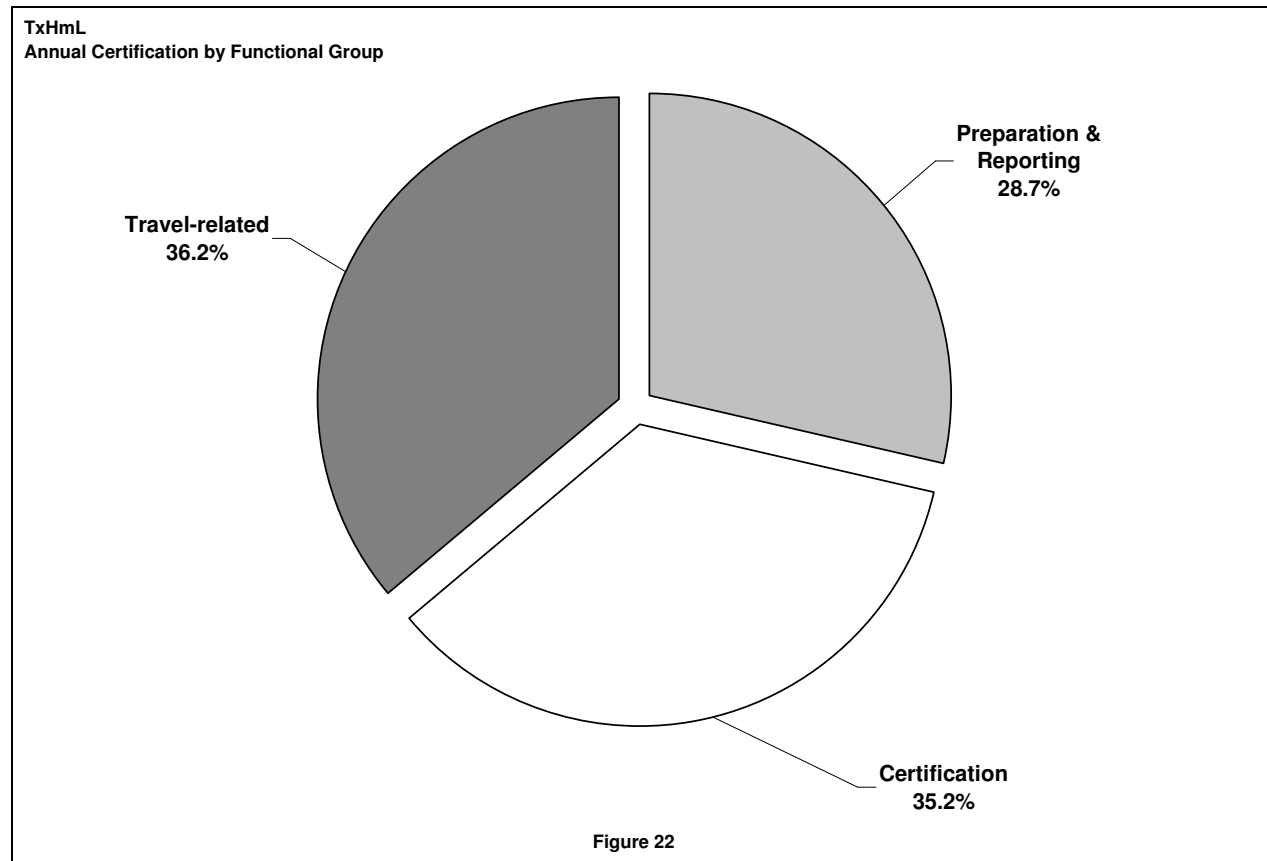
LIMITATIONS

Standard times were only reported for Program Types with sufficient data.

The TxHmL program was established on 3/1/04 and commenced certification activity effective 9/21/04. As a new program, TxHmL contracts were deemed based on HCS certification for the same waiver contract area. The first certification review for a TxHmL contact was designated as an "Initial" review regardless of deemed status. Future time studies will likely reflect a higher proportion of Annual Certification reviews and a lower proportion of Initial certification reviews.

Because this WMS was conducted for the period April through September 2005 instead of a full year, the impact of seasonality that the workload might have had on this WMS is unknown.

Two natural disasters (Hurricanes Katrina and Rita) occurred during the WMS study period creating unforeseen disruptions in the normal work schedule and collection of time samples.

RECOMMENDATIONS

To better inform agency leadership of the effects of major initiatives and address seasonal concerns, it is recommended that ongoing (gathering data continuously) work measurement studies be conducted.

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Appendix A

Basic Study Statistics

A-1. Basic Statistics

Average number of hours on study	80
Average number of beeps per hour	2.5
Length of study in weeks	2
Participant Population	17
Participation rate	100.0%
Number of participants*	17

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A-2

Appendix B

**Work Measurement Study
Definitions**

WAIVER SURVEY AND CERTIFICATION DEFINITIONS

Waiver Survey & Certification Code Descriptions

Program Type	Description
Home Community Services (HCS)	An ICF-MR waiver program designed to serve persons with mental retardation and some persons with related conditions. Services delivered by a contracted provider are evaluated for certification shortly after the first individual is enrolled in the contract and annually thereafter. A license is not required.
Texas Home Living (TxHmL)	An ICF-MR waiver program designed to provide limited services to persons with mental retardation and some persons with related conditions in their own or family home. Services delivered by a contracted provider are evaluated for certification shortly after the first individual is enrolled in the contract and annually thereafter. A license is not required.
General Program-Related	Performance of Regulatory Services associated activities but the duties cannot be identified with a specific program/facility type. Examples of General Program-Related activities include: • Unit meetings • Attending professional seminars for continuing education credit • Attending training related to job duties • Reviewing survey and certification clarification memos • Reviewing e-mails that clarify the intent of a principle or that instruct how to document findings • Filing updated policies and procedures • Preparing training curricula • Presenting information related to HCS or TxHmL at conferences Examples which would **NOT** be recorded as General Program-Related activities include: receiving a complaint, typing deficiencies, reviewing a plan of correction (PoC), etc., as these should be identified with a specific program type.
Non-Work	Performance of Non-Work related activities during the paid workday. Lunch time is outside of the paid workday, so lunch is **NOT** a Non-Work activity. Non-Work examples include: • personal phone calls • breaks • working on this study (e.g., communication with a work measurement analyst)

Waiver Survey & Certification Code Descriptions (continued)

Compliance Review Type	Description
Initial	A compliance review conducted within 120 days of a contract receiving its first consumer to determine compliance with certification principles.
Annual Certification	A compliance review for recertification of contracts.
Follow-up	A compliance review conducted to determine if corrective action has been completed for items cited during a previous compliance review.
Intermittent/Drop-by	A compliance review or on-site visit (drop-by) conducted in response to a complaint, Abuse/Neglect/Exploitation, or administration concern.

Activity Type	Description
Pre-survey Preparation	Any activity (except trip planning & actual travel) related to a specific compliance review that occurs prior to the entrance conference.
Entrance	A conference with provider or authority staff to state purpose of compliance review and to request information necessary to conduct the compliance review.
Record Review Information Gathering	Information gathered through review of documented sources, such as consumer records, personnel records, contracts, committee meeting minutes, reports, electronic records, etc.
Observation Information Gathering	Information gathered about the residents, environment, and physical plant (using the five senses). This could be a formal environmental compliance review and/or an impromptu discovery.
Interview with Paid Staff Information Gathering	Information gathered through conversations with staff employed or contracted by the program provider or local authority.
Interview with Stakeholder Information Gathering	Information gathered through conversations with individuals other than paid staff including consumers, LARs, family members, advocates, neighbors, etc.
Providing Information	Preparing or disseminating information related to service delivery specific to HCS/TxHmL. Includes responding to inquiries and providing technical assistance.
Information Analysis	Evaluating information gathered to determine compliance with certification or TxHmL authority requirements.
Debriefings/Exit Conference	Conveying findings and recommendations of the compliance review.
Report Generation	Completion of forms, reports, notes, or citations of the compliance review.
Travel	Travel related to compliance review. Actual travel as well as walking to and from mode of transportation. Wait time at the airport.
Trip Planning & Post	Planning trip (making hotel, car, plane reservations, printing map, etc.). Compiling trip receipts and submission for reimbursement.

Appendix C

Study Instruction Booklet

DEPARTMENT OF AGING AND DISABILITY SERVICES

WAIVER & CERTIFICATION
STUDY INSTRUCTION BOOKLET

2005

Table of Contents

Contacts and Troubleshooting Assistance

Performance & Workload Measurement Unit (PWM)
Office of Budget & Data Management
Department of Aging & Disability Services
701 W. 51st Street, W-421
Austin, TX 78751

Fax: 512/438-4675

Contacts For:

- **General Study Questions**
- **PDA Equipment**
- **PDA Use**

Wes Yeager, Manager 512/438-3673
Jan Amazeen, Sr. Analyst 512/438-3785
Vivian Haynes, Analyst   512/438-3341

Or E-mail: workmeasurement@dads.state.tx.us

Please contact your Program Automation Coordinator (PAC) for any hardware or software problems/questions.

1

WORK MEASUREMENT EQUIPMENT

- **PDA HARDWARE**

PALM m500 PDA

If you receive a Palm M500 for the study, your package will include:

| **A Palm PDA** | **Palm Power Cord** | **Palm Synchronization Cradle** |

The power cord for the Palm should be attached to the cradle's USB cord.

SONY S360 PDA (Clié)

If you receive a Sony Clié for the study, your package will include the following:


| **A Clié PDA** | **Clié Power Cord** | **Clié Synchronization Cable** |

2

PDA HARDWARE SETUP

1. Shut down PC.
2. Plug the PDA synchronization cradle/cable into the USB port on the back of the PC below the area where the mouse and keyboard are plugged in as shown below.
    Palm Only Note: The charger connects directly to the cradle. Be sure to plug the AC adapter into an AC current outlet after connecting the cradle to the PDA.
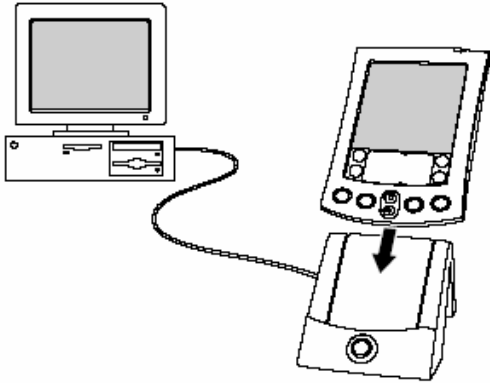3. Power up PC.

AC Charger to Cradle Connection
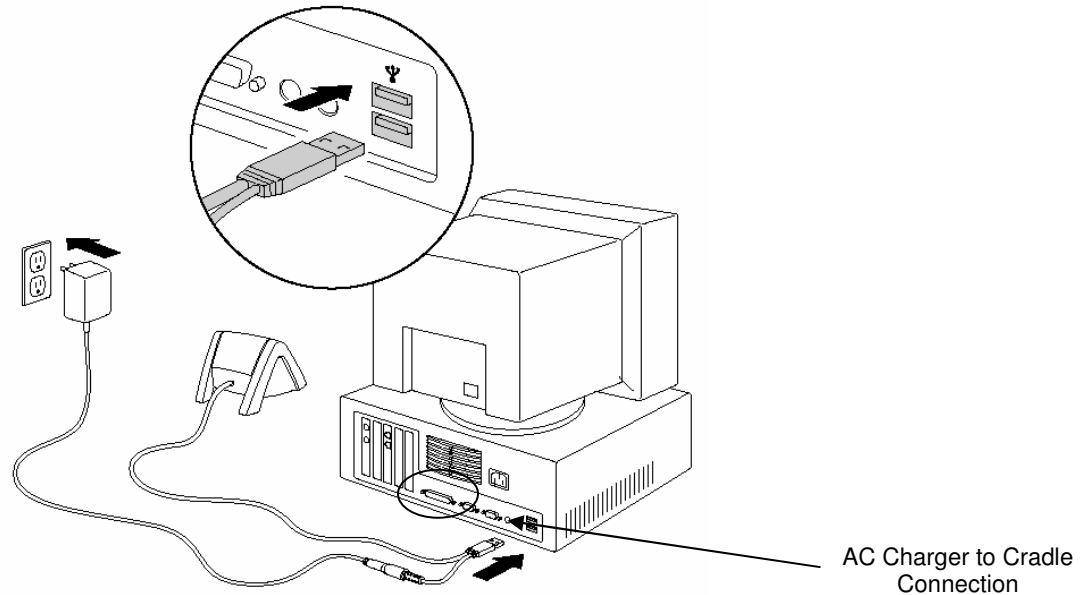
Palm Cradle Installation

Clié Cable Installation
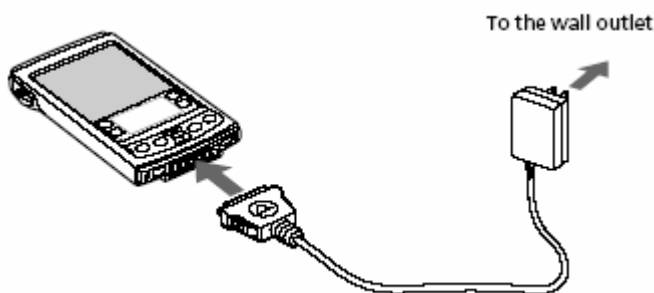
3
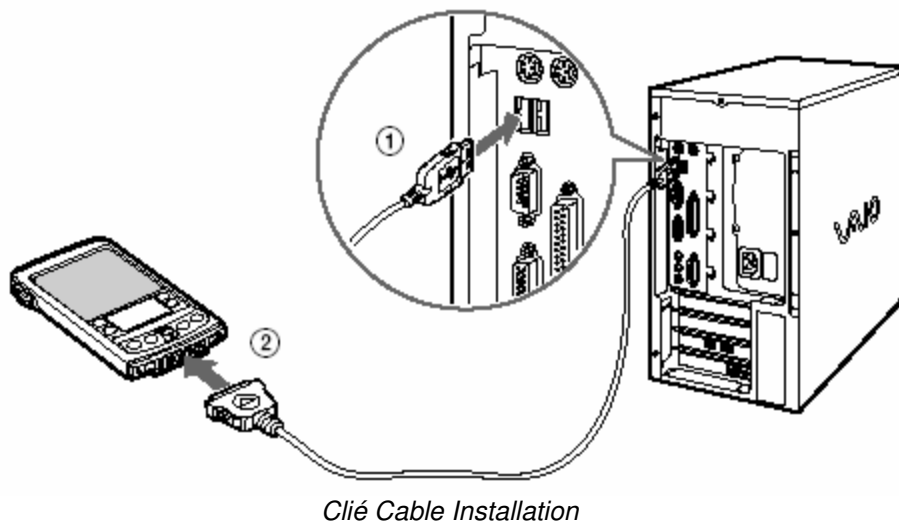
PDA MAINTENANCE AND FAQ

Charge the Palm PDA in the synchronization cradle as shown below:

Note: Be sure the AC Charger cable is connected to the Cradle Cable

Charge the Clié PDA, as shown below:

1. Connect the AC adapter to an AC current outlet and attach cable to PDA.


General Maintenance:

- Use the stylus supplied with the PDA. Never use an actual pen or pencil or other sharp object on the surface of the PDA screen.
- The PDA is not waterproof. Do not expose it to rain or other moisture.
- Do not drop the PDA or expose it to any strong impact.
- Do not leave the PDA on the dashboard of a car on a hot day. Keep it away from heaters and other heat sources.
- To clean the PDA dampen a soft cloth with a diluted window-cleaning solution and gently wipe the PDA screen.

4

FAQ

Where is the stylus?

It is located on the right side of the PDA in a designated slot.
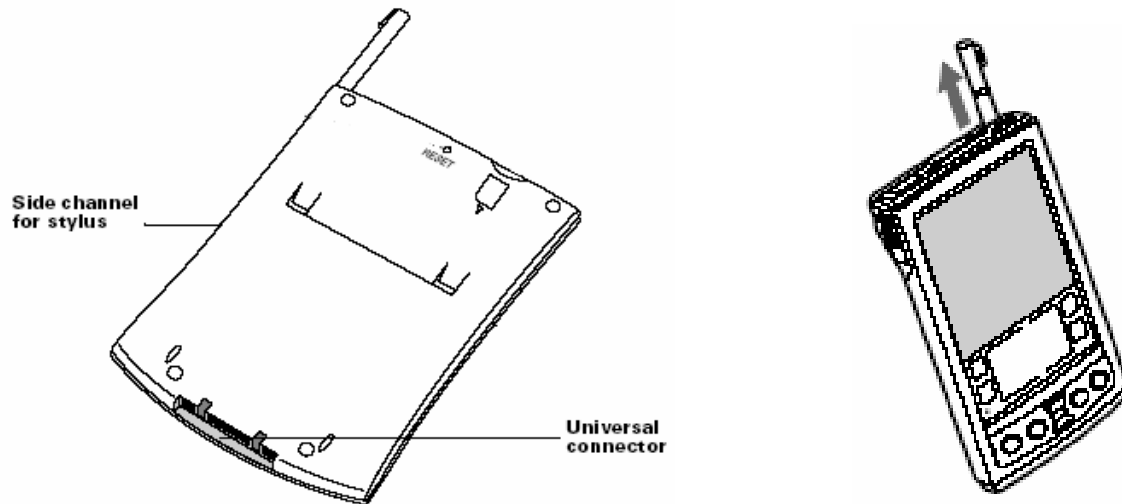
Lost stylus?

Contact Performance & Workload Measurement unit (see Contacts and Troubleshooting Assistance) for further instructions.

My PDA keeps turning itself off.

The PDA turns itself off after two minutes of inactivity to conserve battery power.

My PDA won't turn on.

Follow the instructions for charging the PDA.

When I try to Hot Sync nothing happens.

Review the PDA Synchronization Procedures section. If the problem persists, contact your Program Automation Coordinator (see *Contacts and Troubleshooting Assistance*).

When I try to charge my PDA nothing happens.

Make sure all connections are secure (refer to charging section above) and that the PDA is turned off. If you are still having problems contact the Performance & Workload Measurement unit (see *Contacts and Troubleshooting Assistance*) for further instructions.

For additional problems or questions, contact the Performance & Workload Measurement unit. See *Contacts and Troubleshooting Assistance*.
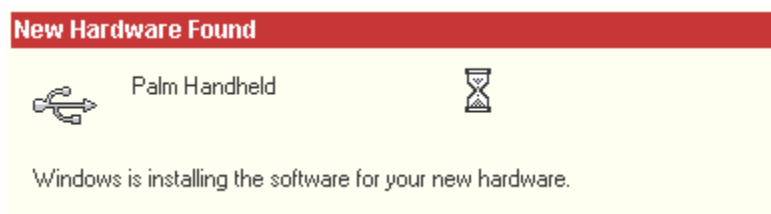
5

PDA SYNCHRONIZATION PROCEDURES

The synchronization process, called the "HotSync Operation" or "Sync," is the transferring of information between a computer and a PDA. The PDA transfers data to your computer, which then transfers the data to a Performance & Workload Measurement server.

Palm PDA Sync Procedures

1. Place the PDA in the cradle

2. Press the Hot Sync button on the cradle as shown below:
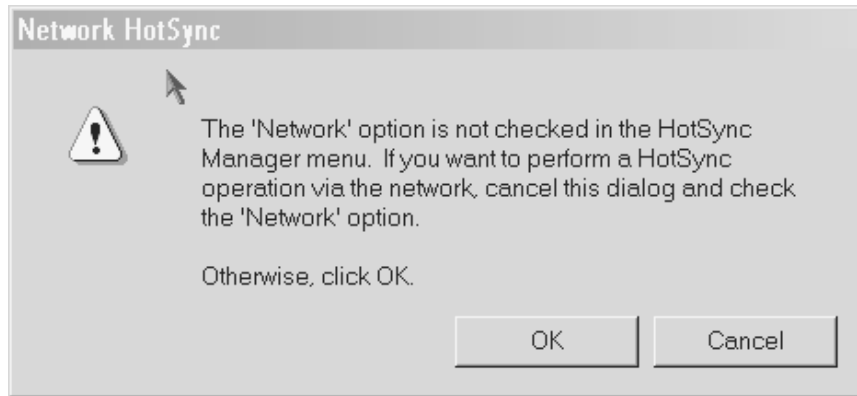

3. The first time you sync the PDA, the following message will appear:

The above message will disappear when the following message comes up.

6

When you click on the OK button, the following message may appear.
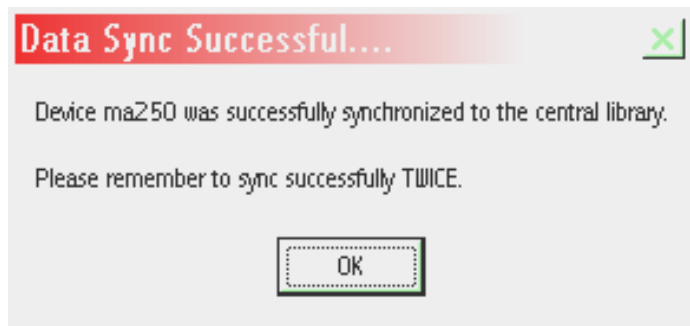

Click on the OK button.

4. When the synchronization begins the following screen appears.

5. While synchronization is in progress, a screen similar to the following will be displayed:

7

When synchronization has completed successfully, the message below will appear: (For Windows 98 users it will appear minimized on the task bar). Leave the message on the screen/taskbar.

6. If synchronization is unsuccessful, contact your Program Automation Coordinator [or if you are a Program Automation Coordinator contact Performance & Workload Measurement Unit] (see Contacts and Troubleshooting Assistance).

7. When the PDA has finished synchronizing, repeat step 2.

8. You should then have a second successful message as shown above.

9. Click OK on the two messages.

10. Remove the PDA from the cradle.

11. Click the "Home" button below the PDA screen on the left and a screen similar to the following will appear:
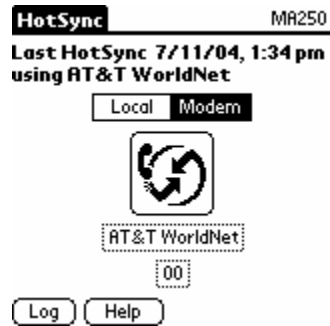

PDA Sampling Screen

8
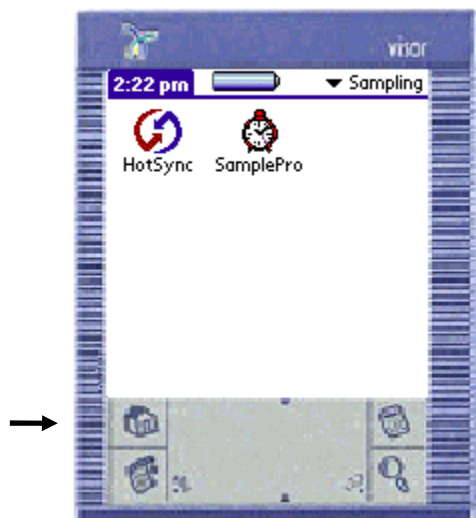
PDA SYNCHRONIZATION PROCEDURES

The synchronization process, called the "HotSync Operation" or "Sync," is the transferring of information between a computer and a PDA. The PDA transfers data to your computer, which then transfers the data to a Performance & Workload Measurement server.
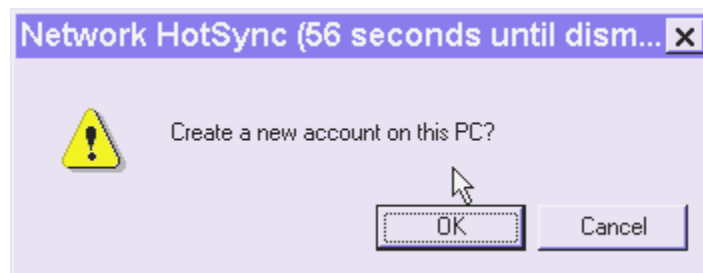
Clié PDA Synch Procedures

1. Attach the Sync cable to the PDA as shown in PDA Client Hardware Setup.

2. From the PDA Sampling screen (see Palm PDA Sync Procedures step 8), click on the Hot Sync icon which takes you to the screen similar to the following.
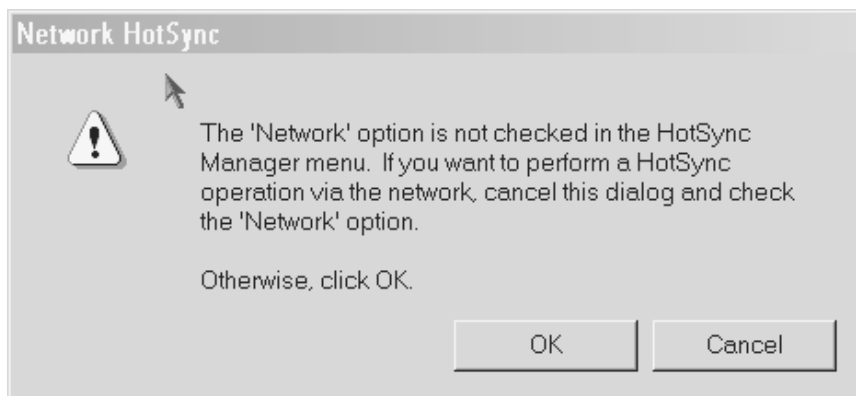

3. The first time you sync the PDA, the following message will appear:

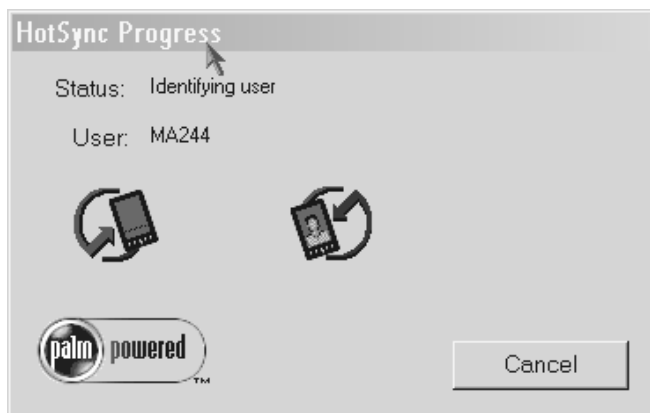The above message will disappear when the following message comes up.

9

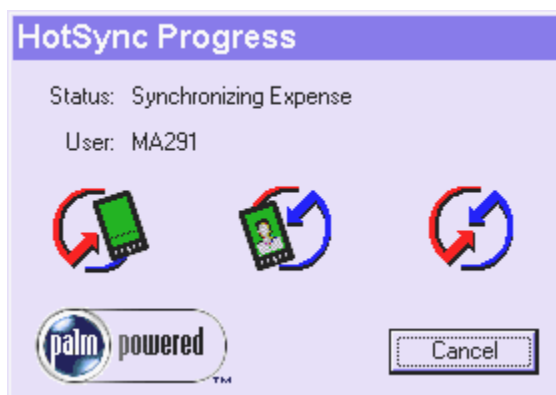When you click on the OK button, the following message may appear.
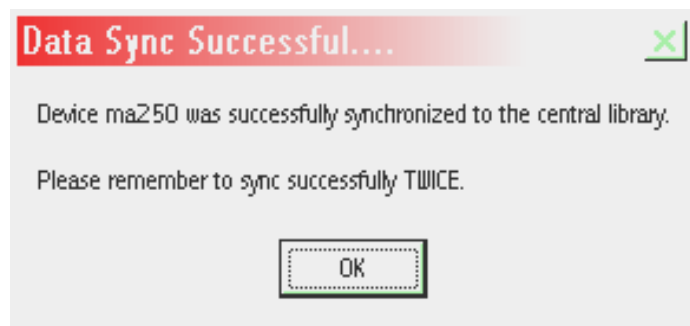

Click on the OK button.

4. When the synchronization begins the following screen appears.

5. While synchronization is in progress, a screen similar to the following will be displayed:

10

When synchronization has completed successfully, the message below will appear: (For Windows 98 users it will appear minimized on the task bar.) Leave the message on the screen/taskbar.

6. If synchronization is unsuccessful, contact your Program Automation Coordinator [or if you are a Program Automation Coordinator contact Performance & Workload Measurement Unit] (see Contacts and Troubleshooting Assistance).

7. When the PDA has finished synchronizing, repeat step 2.

8. You should then receive a second successful message as shown above.

9. Click OK on the two messages.

10. Remove the cable from the PDA.

11. Click the "Home" button below the PDA screen on the left and a screen similar to the following will appear:

PDA Sampling Screen

11

C-13

WAIVER & CERTIFICATION WORK MEASUREMENT STUDY INSTRUCTIONS

General Instructions

For each work day, the PDA device should be turned on as soon as you begin your work day, and should not be turned off until the end of your work day.

Do not record any signals during lunch break (or if you are off duty in the middle of the work day such as sick leave for a doctor appointment or annual leave to run a personal errand), but please record all break time using the appropriate program code of Non-work.

You should receive about 20 signals during an eight-hour work day (approx. 2.5 signals per hour). If you feel you are not receiving the correct amount of signals for two days in a row, please contact the your Work Measurement Study analyst.

Your participation in the study will be for approximately 80 work hours and you must have at least 184 time samples in order to complete the study. If you take any leave, you will have to make up that time at the end of the study. For example, if you were on annual leave for two days, you will most likely need to extend your study participation a couple of days to be able to meet your study requirements.

PLEASE REMEMBER TO CHARGE YOUR PDA EACH DAY.

You will need to synch your data upon returning to your office. (See Syncing Procedures on page 6). This will send your data to the PWM server. Your analyst may call you to verify the data you synched.

You will be notified by your analyst when you have acquired the required number of hours and time samples. Your analyst will call you for an exit interview and provide you with equipment return instructions.

Program Type	Description
Home Community Services (HCS)	An ICF-MR waiver program designed to serve persons with mental retardation and some persons with related conditions. Services delivered by a contracted provider are evaluated for certification shortly after the first individual is enrolled in the contract and annually thereafter. A license is not required.
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Non-Work	Performance of Non-Work related activities during the paid workday. Lunch time is outside of the paid workday, so lunch is **NOT** a Non-Work activity. Non-Work examples include: • personal phone calls • breaks • working on this study (e.g., communication with a work measurement analyst)

13

Compliance Review Type	Description
Initial	A compliance review conducted within 120 days of a contract receiving its first consumer to determine compliance with certification principles.
Annual Certification	A compliance review for recertification of contracts.
Follow-up	A compliance review conducted to determine if corrective action has been completed for items cited during a previous compliance review.
Intermittent/Drop-by	A compliance review or on-site visit (drop-by) conducted in response to a complaint, Abuse/Neglect/Exploitation, or administration concern.

| Activity Type	Description
Pre-survey Preparation	Any activity (except trip planning & actual travel) related to a specific compliance review that occurs prior to the entrance conference.
Entrance	A conference with provider or authority staff to state purpose of compliance review and to request information necessary to conduct the compliance review.
Record Review Information Gathering	Information gathered through review of documented sources, such as consumer records, personnel records, contracts, committee meeting minutes, reports, electronic records, etc.
Observation Information Gathering	Information gathered about the residents, environment, and physical plant (using the five senses). This could be a formal environmental compliance review and/or an impromptu discovery.
Interview with Paid Staff Information Gathering	Information gathered through conversations with staff employed or contracted by the program provider or local authority.
Interview with Stakeholder Information Gathering	Information gathered through conversations with individuals other than paid staff including consumers, LARs, family members, advocates, neighbors, etc.
Providing Information	Preparing or disseminating information related to service delivery specific to HCS/TxHmL. Includes responding to inquiries and providing technical assistance.
Information Analysis	Evaluating information gathered to determine compliance with certification or TxHmL authority requirements.
Debriefings/Exit Conference	Conveying findings and recommendations of the compliance review.
Report Generation	Completion of forms, reports, notes, or citations of the compliance review.
Travel	Travel related to compliance review. Actual travel as well as walking to and from mode of transportation. Wait time at the airport.
Trip Planning & Post	Planning trip (making hotel, car, plane reservations, printing map, etc.). Compiling trip receipts and submission for reimbursement.

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WAVIER & CERT STUDY INSTRUCTIONS

To turn on the PDA device, depress the on/off button located on the top right portion of the device. The following icon screen will appear: (For the Clié device a Pref icon will appear instead of the Clock.)


Remove the stylus located on the top right side of the PDA and tap on the Sample Pro icon to start the program. A sign-on screen will appear.


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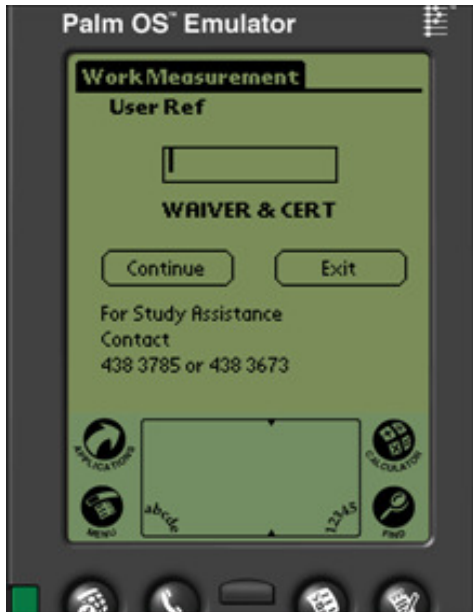
Enter your ID provided to you by Performance and Workload Measurement Unit. Use your stylus and tap on "abc" or "a" on the device (a keyboard should appear) use the keyboard to enter your ID, tap the **Done** key when finished.

Your ID should appear in the box. Tap the Continue button.

C-19
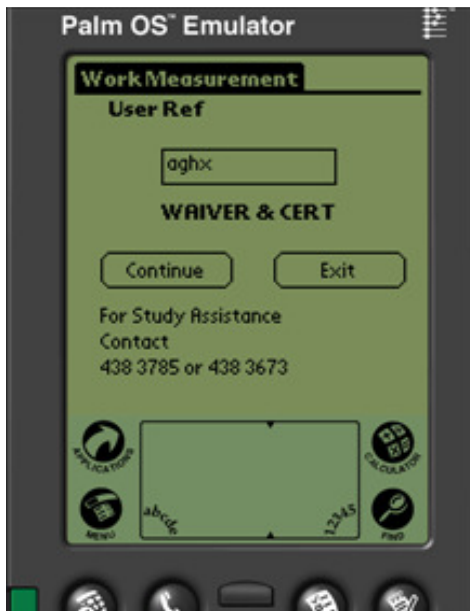
The following Main Input screen will appear. Using your stylus select the Start Study button.
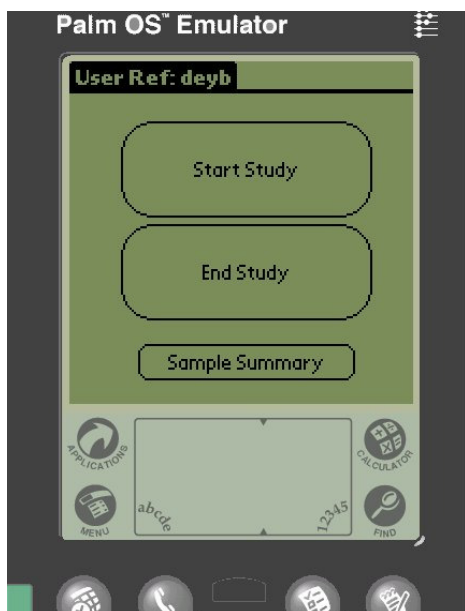
The Sampling in Progress screen appears as shown below. At the bottom of the screen you will see three prompting modes: Sound, LED and Buzz. To activate these options tap the square in front of your selection(s). You may have 1 or more selected simultaneously. **Note:** (The more options selected, the more wear on the battery.) (The Clié device only has sound available.)

The study is now in progress. Please wait for a signal to enter your data. If you would like to access the Lunch/Leave/Travel option shown simply tap on the button on this screen. Refer to page 21 for Lunch/Leave/Travel information.

To stop the study, tap the Exit button. The study will close and you will be returned to the Main Input screen (see page 25).

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When you are prompted for an entry by the device (Sound, LED, and/or Buzz – according to the selected options), the screen shown below appears.

To enter data, tap the **OK** button to proceed to the data collection screen.
Use your stylus and tap on your Program Type selection.

Then use your stylus and tap on your Compliance Review selection.

Then use your stylus and tap on your Activity selection.   If you need to scroll to your Activity selection tap the vertical scroll bar and drag down until the activity appears, then make your selection.

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Once you made all your selections, review the selected entries and if the selections are correct, click OK. You will then be taken back to the Sampling in Progress screen shown on page 18. If corrections are required, select the level above the inaccurate entry (or the Program Type level) and make the correct entries.

Lunch/Leave/Travel

The Lunch/Leave/Travel function is to record your Lunch time, your Leave time and any Travel time you take during the study day. Tap on the Lunch/Leave/Travel button with your stylus.

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The following screen will appear. If this is the first Lunch/Leave/Travel entry of the day the screen will be blank. If Lunch/Leave/Travel entries have already been made for that day they will appear. Tap on the NEW button.

The following screen appears, tap on Lunch.

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The following screen appears. The Start Time box will be highlighted, select the hour and minute vertical scroll areas to select the start time. Tap inside the End Time box and then select the hour and minute vertical scroll areas to select the stop time.

The system will calculate the total elapsed time and present it for confirmation purposes.
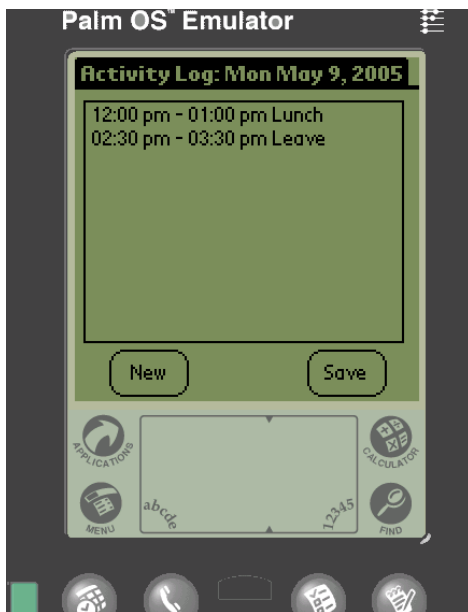
When you have defined the times click the OK button and the entry will be saved. The entry will appear in this window.
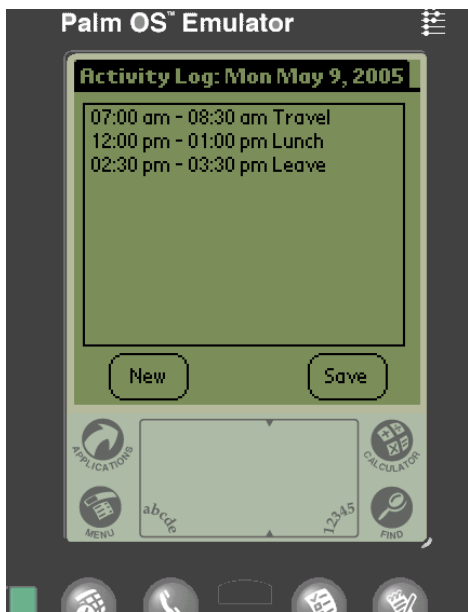

Repeat previous steps to record other Lunch/Leave/Travel times as necessary.

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The next two screens show a Leave entry and a Travel entry.

(Leave Entry)

Palm OS™ Emulator

Activity Log: Mon May 9, 2005

12:00 pm - 01:00 pm Lunch
02:30 pm - 03:30 pm Leave

New   Save

(Travel Entry)

Palm OS™ Emulator

Activity Log: Mon May 9, 2005

07:00 am - 08:30 am Travel
12:00 pm - 01:00 pm Lunch
02:30 pm - 03:30 pm Leave

New   Save

Please Note: If you receive a signal while recording Lunch/Leave/Travel times (prior to saving the entry), the Sampling Alert screen will appear. Upon completion of entering sampling data, you will need to start the Lunch/Leave/Travel entry process over.

When you have made all the entries, click Exit and you will return to the same screen you were at prior to your Lunch/Leave/Travel entry.

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To End the Study Day

To end your study day, tap the **EXIT STUDY** button.
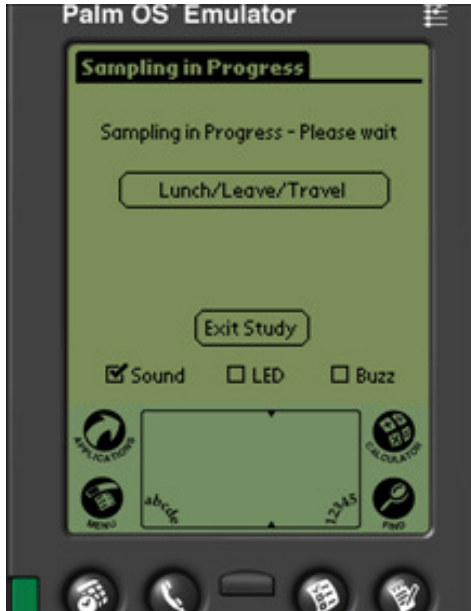
The following Main Input screen will appear. When your workday has ended, completely exit out of the Sample Pro program at the Main Input screen by tapping the End Study button.
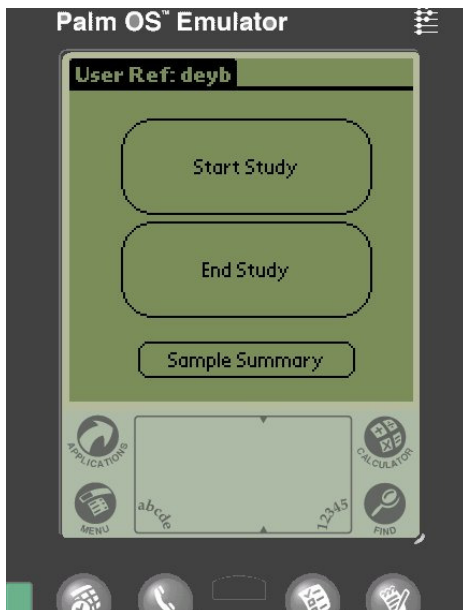
You will return to the icon screen (as shown on page 18). Turn off the device. Please remember to charge the PDA daily.