WebRMS Checklist and Reminders:

Quarterly Web RMS Sample Creation Checklist:

*Initiate calendar changes. If your agency is closed for different days than those reflected on the State Calendar (view the "2011 State Calendar" at Master Data>Maintain Calendar.). <u>Do not attempt to select/assign a calendar within the system</u>. Instead, please e-mail the CFIS_Help_Desk noting the county and cost pool and the days you are scheduled to be closed and the Help Desk staff will assign the appropriate calendar for your sample.

* Request the addition of any new supervisors that will do control group observations. (In the near future operations will be able to add supervisors to both the participant and sample participant lists).

* Verify work schedules. Check and edit, as needed work schedules in Maintain Participant screens.

* Change sample size. Increase sample size if desired. If you previously increased the sample size, you may also decrease the size to the required number of samples.

* Change roster members. Add new positions or remove vacant positions that will remain unfilled through the majority of the next RMS sample period.

Reminders:

* Create your sample and generate the observations no less than five business days prior to the beginning of the new sampling period!

* Remember to follow the Desk Reference "Sample Code" and "Sample Name" naming convention, using your agency's appropriate name and number! Every space, hyphen, and capital letter – it must match EXACTLY! !

Example:
Sample Code: **2011Q4 XX-IM** (replace the XX with your county number).
Sample Name: **(JFS 02710) – XXX County Income Maintenance RMS** (replace the XXX with your county name).
We recommend that you use Copy and Paste from the existing sample as follows:
1) Copy the Sample Code from 2011Q3.
2) Paste in the Sample Code field for the new sample and change the **Q3** to **Q4.**

You can copy the Sample Name for one quarter to the next as it does not change. Save the sample once you have the Sample Code and Name completed.

* Generate and print control list reports no earlier than the first day of the sample period. Remember that this tool is for RMS Coordinators' use only and is not to be shared with supervisors or participants.

* The e-mail notice that is sent to participants is in HTML format. By default, GroupWise is set to display e-mail in plain text format. RMS participants must set their GroupWise system to display e-mail in HTML format in order to access the link to the observation moment.