



# AAA/CIL RMS Survey Participant Training

Provided by the Strategic Systems - Cost Allocation Unit/RMS Central Coordinator Office,  
In partnership with APD Design – Central Program Administration  
Office of Financial Services  
ODHS|OHA Shared Services, Central Office



# Administrative Costs

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Federal regulations require states to carefully determine the administrative costs for each program.



The image shows a magnifying glass and a calculator placed over a spreadsheet. The magnifying glass is focused on a specific row of data in the spreadsheet. The spreadsheet contains numerical values in dollars, organized into columns. The calculator is a standard black handheld calculator with a numeric keypad and function keys.

\$ 2510.00	\$130.75	\$
\$ 236.40	\$ 44.90	\$
\$ 25.10	\$195.70	\$
\$ 64.70	\$475.10	\$ 114.20
\$ 326.70	\$337.95	\$ 162.61
\$ 623.50		\$ 99.64
\$ 52.40		\$ 94.06
\$ 268.10		\$ 123.61
\$ 352.00	\$368.00	\$ 90.60
\$ 264.00	\$145.00	\$ 39.10
\$ 26.00	\$ 50.50	\$ 62.74
75.00	\$263.20	\$ 163.00
451.40	\$551.80	\$ 210.84

The costs include administrative expenses for staff salaries, travel, support, services, and supplies.



## Random Moment Sampling (RMS)

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ODHS uses the federally approved method of Random Moment Sampling (RMS) to survey and record the work being done by RMS eligible staff.

Overall, the RMS Surveys help us...

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**Minimize activity tracking and  
maximize Federal funding.**

Without using the RMS method, every worker would have to accurately track EVERY individual activity they perform, EVERY DAY, and submit it for reporting and cost allocation.

# Survey Distribution

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- ✓ Five days prior to the start of every month, the RMS system schedules surveys for all RMS eligible AAA/CIL staff in random time slots throughout the month.
- ✓ Currently, there are approximately 713 participants across the state, and each participant is currently scheduled 10 surveys per month in order to accurately measure the work being done. This process generates 7,130 surveys scheduled and distributed across all AAA/CIL offices.
- ✓ Participants are prohibited from seeing their scheduled surveys in advance, in order to provide a true 'random moment' sampling of monthly activities.

# Survey Results

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At month end, the collective total of the completed surveys help determine the proportion of funding allocated between each Federal and State program, by linking each recorded activity to their appropriate funding source.

# Survey Email Notifications

When a survey participant is scheduled to complete a survey, they'll receive an autogenerated email notification from the RMS system, advising that they have a survey due; the notification includes all the information needed to access the survey.

NOTE : The notifications are distributed at the exact date/time the survey is scheduled for; they are not sent in advance.

## [New RMS Survey Notice: Survey ID: 11111](#)

**From:** rms.noreply@dhsosha.state.or.us <rms.noreply@dhsosha.state.or.us>

**Sent:** Wednesday, July 27, 2022 5:30 AM

**To:** Mouse Mickey <Mickey.Mouse@dhsosha.state.or.us>

**Cc:** RMS NoReply <RMS.NoReply@odhsosha.oregon.gov>

**Subject:** New RMS Survey Notice: Survey ID: 11111

**\*\*\* DO NOT REPLY TO THIS EMAIL \*\*\***

**\*\*\* FOR MORE INFORMATION CONTACT YOUR RMS BRANCH COORDINATOR LISTED BELOW \*\*\***

You have an RMS survey that has not yet been completed. Please log in to the RMS system to complete it as soon as possible. The survey will no longer be available if not completed by the end of the day.

Survey Details:

**Survey ID:** 11111

**Start Date:** 7/26/2022

**Start Time:** 3:04 PM

**Participant Name:** Mickey Mouse

**Employee ID:** P0000000

**Branch Coordinator:** Donald Duck

**Backup Branch Coordinator:** Walt Disney

**Link to Survey:**

<https://rms.dhsosha.state.or.us/SurveyParticipants/Details/11111>

If you experience any technical issues with accessing RMS, or completing your survey, please contact your local branch coordinator, or [RMSS@odhsosha.oregon.gov](mailto:RMSS@odhsosha.oregon.gov).



# 'Late' RMS Survey Email Notifications

If a survey is not completed on the first day that it's been scheduled for, a 'Late' survey email notification will automatically be sent out the following business day.

NOTE: The 'Late' notification acts as a reminder informing the participant that the survey must be completed by the end of the second business day.

Late RMS Survey Notice: Survey ID: 11111

**From:** [rms.noreply@dhsoha.state.or.us](mailto:rms.noreply@dhsoha.state.or.us) <[rms.noreply@dhsoha.state.or.us](mailto:rms.noreply@dhsoha.state.or.us)>

**Sent:** Wednesday, July 27, 2022 5:30 AM

**To:** Mouse Mickey <[Mickey.Mouse@dhsoha.state.or.us](mailto:Mickey.Mouse@dhsoha.state.or.us)>

**Cc:** Duck Donald <[Donald.Duck@dhsoha.state.or.us](mailto:Donald.Duck@dhsoha.state.or.us)>; Disney Walt <[Walt.Disney@dhsoha.state.or.us](mailto:Walt.Disney@dhsoha.state.or.us)>

**Subject:** Late RMS Survey Notice: Survey ID: 11111

**\*\*\* DO NOT REPLY TO THIS EMAIL \*\*\***

**\*\*\* FOR MORE INFORMATION CONTACT YOUR RMS BRANCH COORDINATOR LISTED BELOW \*\*\***

You have an RMS survey that has not yet been completed. Please log in to the RMS system to complete it as soon as possible. The survey will no longer be available if not completed by the end of the day.

Survey Details:

**Survey ID:** 11111

**Start Date:** 7/26/2022

**Start Time:** 10:44 AM

**Participant Name:** Mickey Mouse

**Employee ID:** P0000000

**Branch Coordinator:** DONALD DUCK

**Backup Branch Coordinator:** WALT DISNEY

**Link to Survey:**

<https://rms.dhsoha.state.or.us/SurveyParticipants/Details/11111>

If you experience any technical issues with accessing RMS, or completing your survey, please contact your local branch coordinator, or [RMSS@odhsoha.oregon.gov](mailto:RMSS@odhsoha.oregon.gov).



# RMS Surveys

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Per Federal guidelines, the participants have two business days to complete their survey(s) online, recording the activity they were doing at the specific date and time of the survey.

NOTE: The survey scheduling excludes Holidays and Weekends.

*\*\*The two-day time frame helps ensure accuracy, by completing the survey while the memory of what the participant was doing is still fresh in their mind.*

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The current RMS system ***is*** compatible with most common web browsers, specifically 'Chromium' based browsers such as **MS Edge** and **Google Chrome**; and is accessible on all smart devices, including iPhones.

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Participants and Coordinators can access the surveys by clicking on the link provided in the survey email notifications, or by using the General RMS URL, <https://rms.dhsoha.state.or.us/>, then after signing into Citrix, the surveys can be accessed by clicking on Surveys>My Surveys from the left menu panel.

# Accessing RMS

# Options to Access RMS

1. The most common way of accessing the survey is to use the survey link provided in the participants survey email notification.
  - a) When clicking on the survey link provided, the participant, or branch coordinator should be prompted to sign into Citrix by using their P number and password.
  - b) Once they are successfully signed in, they will be taken directly to their survey.
2. The other option is for the participant to...
  - a) Open a new internet window, preferably Google or MS Edge.
  - b) Paste the general RMS URL, <https://rms.dhsoha.state.or.us/> in the address line.
  - c) You will be prompted to sign into Citrix, and once successfully logged into Citrix, the RMS Home Page should be visible.
  - d) From there, go to the left menu and click on Surveys>My Surveys.
3. If working outside the office, RMS should be able accessible through laptops and smart devices, including iPhones by using either method mentioned above. However, if you experience any issues, please contact [RMSS@odhsoha.Oregon.gov](mailto:RMSS@odhsoha.Oregon.gov).

# The RMS Home Page

The RMS Home Page [URL, <https://rms.dhsoha.state.or.us/>,] provides basic information about RMS, and Quick Links for additional RMS resources and information.

Home Page - RMS

https://rms.dhsoha.state.or.us

OFS  
OFFICE OF FINANCIAL SERVICES

RMS

ROSE, SUSAN R

## Welcome to the Random Moment Sampling (RMS) System

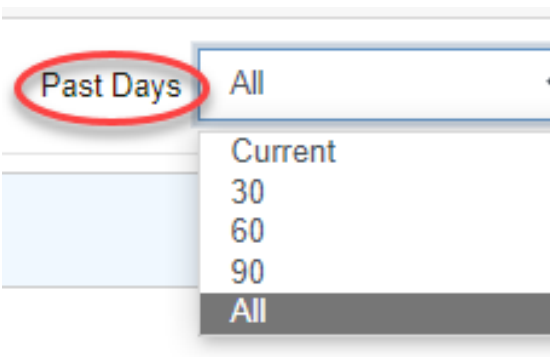
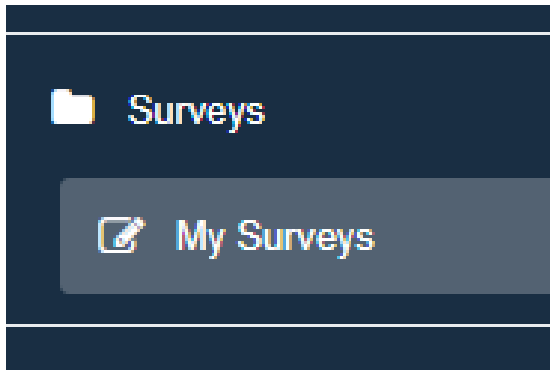
Across the nation, State and Federal governments share the costs to administrate public assistance programs such as Medicaid, SNAP, TANF, ERDC, Foster Care, and many others. Costs include administrative expenses for staff salaries, travel, support, and supplies.

Federal regulations require states to carefully determine the administrative costs for each program. ODHS uses the federally approved method of Random Moment Sampling (RMS). From the results of the completed RMS surveys, the collective total of each survey helps determine the proportion of funding allocated between each Federal and State program by linking each activity to their appropriate funding source.

The RMS system and processes are administered by the ODHS RMS Central Coordinator Office within the Systems - Cost Allocation Unit in the Office of Financial Services (OFS). Our RMS general email address is available as a quick link on this page, as well as our RMS/Cost Allocation 'OWL' [SharePoint] page that provides various resources for RMS users and support staff.

### Quick Links

- RMS Email
- RMSS OWL Page
- RMS Training Materials



Showing 1 to 4 of 4 entries

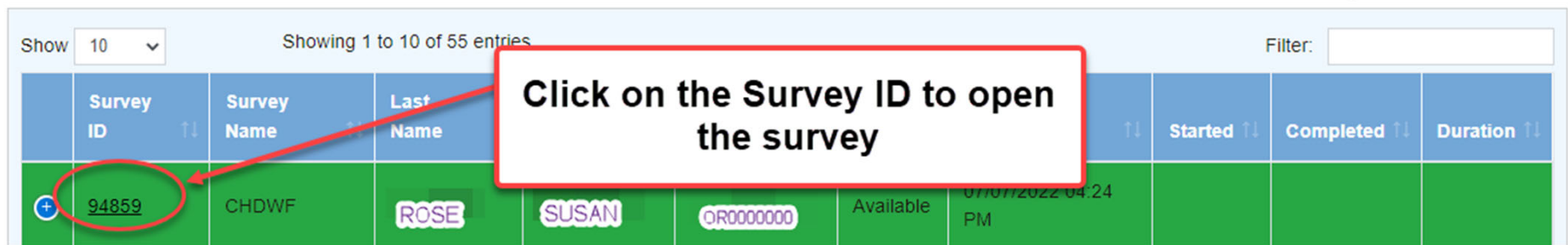
Last Name	First Name	Employee ID	Status	Scheduled
ROSE	SUSAN, R	OR0186505	Missed	03/28/2022 12:00 AM
ROSE	SUSAN, R	OR0186505	Missed	03/28/2022 12:00 AM

# Accessing the Survey

- The quickest way to access your survey is to click on the survey link provided in your survey email notification.
- If you use the main URL through your favorites, then once you're in RMS, you can click on 'My Surveys' from the left menu panel.
- If you have any current surveys, they will show up in the results. (NOTE: Current surveys consist of surveys scheduled for 'yesterday and today'.)
  - If you don't see any surveys, you can change the filter in the 'Past Days' field from 'Current', to 30, 60, or 90 days, and beyond.

# Opening the Survey

Once you find the survey you're looking for, click on the Survey ID to open the survey.



The screenshot shows a table with the following columns: Survey ID, Survey Name, Last Name, Started, Completed, and Duration. The first row of data is highlighted in green and contains the following information: Survey ID 94859, Survey Name CHDWF, Last Name ROSE SUSAN, OR0000000, Available, and 07/07/2022 04:24 PM. A red circle highlights the Survey ID '94859', and a red arrow points from a callout box to it. The callout box contains the text: 'Click on the Survey ID to open the survey'.

Survey ID	Survey Name	Last Name	Started	Completed	Duration
94859	CHDWF	ROSE SUSAN	OR0000000	Available	07/07/2022 04:24 PM

# Activating the Survey Selections

Once you open the survey, make sure you activate the survey selections by clicking on 'Start Survey', or 'Edit Survey'.

The screenshot displays the RMS interface with two survey cards. The first card, titled 'Survey - SSP-ELIG', shows fields for Employee ID, Survey ID, Status, and Scheduled (07/25/2022 03:04 PM). Below the card, there are buttons for Print, Start Survey (highlighted with a red circle and arrow), Preview, and Back to List. The second card, titled 'Survey - CHDWF', shows fields for Employee ID, Survey ID, Status, and Scheduled (07/07/2022 03:44 PM). Below the card, there are buttons for Print, Edit Survey (highlighted with a red circle and arrow), Preview, and Back to List. The interface also shows user information 'ROSE, SUSAN R' and various navigation options like 'Print', 'Preview', and 'Back to List'.

**NOTE: If you skip this step, all selections will be grayed out preventing them from being selected.**



# Completing the Survey

1. The survey will ask you a series of questions, for example:
  - ✓ What type of activity were you doing at the time of the survey?

## ACTVD - Activity Details

3.1 What type of activity were you doing at the time of the survey? \*

- A program/case related work activity.
- A non-program work activity.
- Not doing a work related activity.
- Participating in a training.

Once all the questions for the section are complete, the 'Next' button will appear, allowing you to move to the next section of questions.

ACTVD - Activity Details

3.1 What type of activity were you doing at the time of the survey? \*

- A program/case related work activity.
- A non-program work activity.
- Not doing a work related activity.
- Participating in a training.

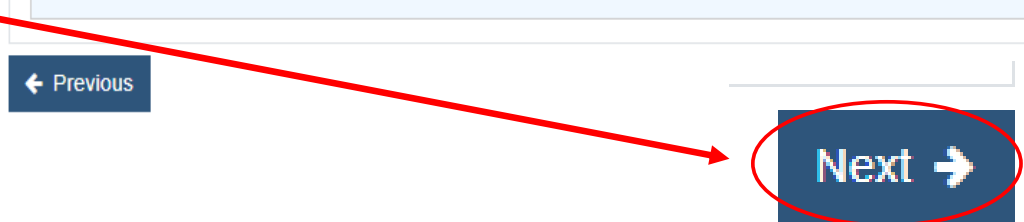
3.2 What type of non-program/non-case related activity were you doing? \*

- On a 10-20 minute work Break.
- Doing general administrative, clerical office work, NOT related to a specific program or case.
- Attending Huddle, a Staff/general meeting, not related to a training, or a case.

← Previous

Next →

Next →



# Selecting Activity Selections

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RMS surveys provide 'activity' selections for each service or activity performed by the program workers.

Make the effort to select the activity that **best matches the activity you were performing at the scheduled date and time of your survey.**

# Remembering the purpose...

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## Remember

RMS is the reporting tool that we use to claim federal funding to help cover program administrative costs.

## Select

Select the survey activity that best represents the activity you were doing at the time of the survey. Accuracy is essential to ensure that we are honestly reporting the activities and claiming appropriate funding.

## Ask for Help

If there are questions concerning what selection(s) to make, please ask your local RMS coordinator, or your manager, for help.

# Saving Your Survey

Once you've completed all the questions, and the narrative, you can click on 'Save>Save and Submit' the survey.

Survey - AAV10

1 CC 3 ACTD 4 APRG

APRGA - Program Activities

4.1 Was the program activity case related? \*

Yes.

No.

4.7 What program activity were you doing at the time of the survey? \*

5.G. ADRC/NWD (No Wrong Door) ⓘ

5.A. Adult Care Home (AFH/ACH) ⓘ

5.B. Adult Protective Services (APS) ⓘ

5.C. Medicare Savings Program (MSP) ⓘ

5.D. Medicaid ⓘ

5.E. Medicare Choice Counseling

5.H. Older Americans Act (OAA) ⓘ

5.I. Oregon Project Independence (OPI) ⓘ

5.K. Supplemental Nutrition Assistance Program (SNAP) Activities ⓘ

5.L. Transition Activities

5.F. Other Programs; Not SNAP, Medicaid, OAA, MMA, OPI, MSP or OHP ⓘ

4.8 Please select the 'No Wrong Door' activity you were doing. \*

5.G.2. Information & Referral - NOT Medicaid Claimable ⓘ

5.G.3. Person Centered Options Counseling - NOT Medicaid Claimable ⓘ

5.G.5 Information & Referral - Medicaid Claimable ⓘ

5.G.6. Person Centered Option Counseling - Medicaid Claimable ⓘ

Save Save Draft Save and Submit Cancel

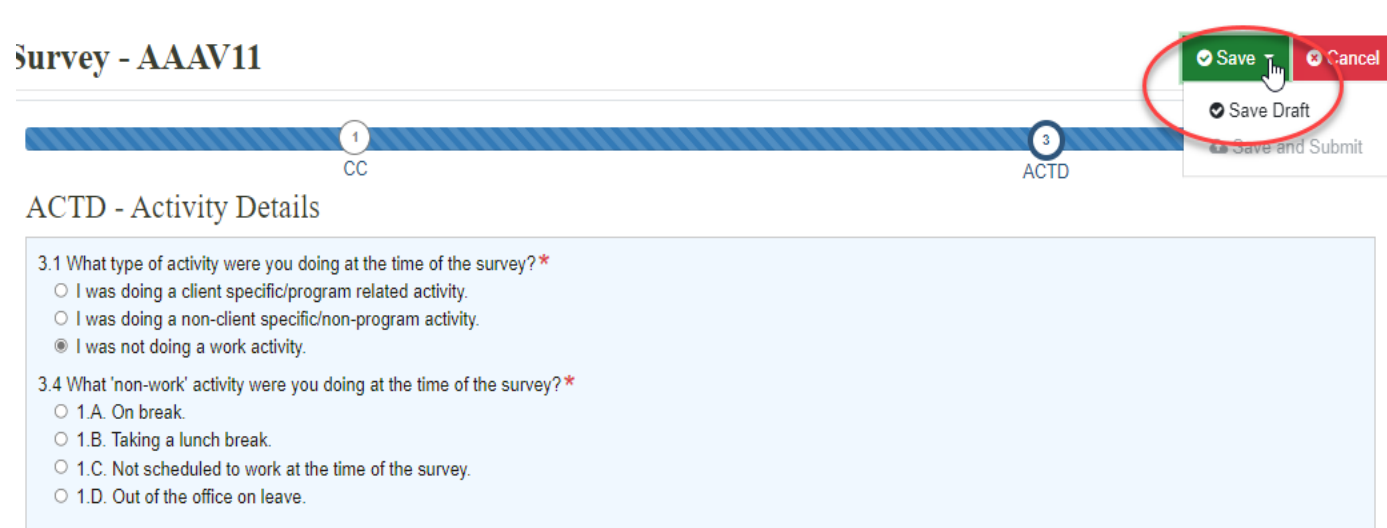
← Previous

# Saving Your 'Partially' Completed Survey

If you start your survey, but get interrupted, or find that you are not able to complete the survey at that moment, you can save your survey as a 'draft'.

If you've already made selections, or entered information into the survey, the 'Save Draft' option will save the entries made, so that you can go back where you left off and finish it later.

NOTE: You still only have two days to finish your 'partially' completed survey, in order to 'Save and Submit' it on time.



The screenshot shows a survey titled "Survey - AAV11". A progress bar at the top indicates two steps: "1 CC" and "3 ACTD". The current step is "ACTD - Activity Details". The survey content includes two questions with radio button options:

3.1 What type of activity were you doing at the time of the survey?\*

- I was doing a client specific/program related activity.
- I was doing a non-client specific/non-program activity.
- I was not doing a work activity.

3.4 What 'non-work' activity were you doing at the time of the survey?\*

- 1.A. On break.
- 1.B. Taking a lunch break.
- 1.C. Not scheduled to work at the time of the survey.
- 1.D. Out of the office on leave.

In the top right corner, a menu is open with three options: "Save", "Save Draft", and "Save and Submit". The "Save Draft" option is highlighted with a red circle and a mouse cursor, indicating it is the selected action.

# Survey Status Definitions

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**Available** = The scheduled survey is ready to access and complete.

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**Late** = The first day of the scheduled survey has passed and the survey still needs to be completed by the end of the day.

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**Completed** = This status indicates that the survey was completed and submitted after clicking 'Save and Submit'. This status shows that no further action is required, and that it is no longer accessible.

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**Missed** = This means that the survey was not completed within the two-day allotted time frame, and the participant/branch coordinator will need to contact the RMS Central Coordinator at [RMSS@odhsoha.oregon.gov](mailto:RMSS@odhsoha.oregon.gov) for assistance.

# 'Available' RMS Surveys


Surveys that are in the 'Available' status are colored green.

	Survey ID ↑↓	Survey Name ↑↓	Last Name ↑↓	First Name ↑↓	Employee ID ↑↓	Status ↑↓	Scheduled ↑↓	Started ↑↓	Completed ↑↓	Duration ↑↓
+	<a href="#">50980</a>	AAAV11				Available 🚩	08/10/2022 10:44 AM	07/11/2022 11:08 AM		48hrs 0mins
+	<a href="#">50988</a>	AAAV11				Available	08/08/2022 02:04 PM			

# Partially Completed Surveys

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Partially completed surveys that are saved in 'Draft' mode will reflect the date and time that they were started, in the 'Started' column. They will also have a 'black flag' icon under the survey status.

Status	Scheduled	Started
Available 	08/10/2022 10:44 AM	07/11/2022 11:08 AM
Available	08/08/2022 02:04 PM	

The black flag indicates that selections were made, and/or, information was entered when it was saved in Draft mode; the black flag is visible regardless of the survey status.



# 'Late' RMS Surveys

Surveys that are in the 'Late' status are colored yellow.

Show  Showing 1 to 10 of 13 entries Filter:

	Survey ID	Survey Name	Last Name	First Name	Employee ID	Status	Scheduled	Started	Completed	Duration
+	██████	CHDWF	██████	██████	██████	Late	07/27/2022 03:28 PM			
+	██████	SSP-ELIG	██████	██████	██████	Late	07/27/2022 04:08 PM			

# 'Completed' RMS Surveys

Surveys that are in the 'Complete' status are colored white.

Survey ID	Survey Name	Last Name	First Name	Employee ID	Status	Scheduled	Started	Completed	Duration
<u>50980</u>	AAAV11				Complete	08/10/2022 10:44 AM	07/11/2022 11:08 AM	07/13/2022 06:08 PM	54hrs 59.44mins
<u>51286</u>	AAAV11				Complete	08/02/2022 11:08 AM	07/11/2022 11:05 AM	07/11/2022 11:06 AM	0hrs 0.51mins

# 'Missed RMS Surveys

Surveys that are in the 'Missed' status are colored pink.

Survey ID	Survey Name	Last Name	First Name	Employee ID	Status	Scheduled	Started	Completed	Duration
<a href="#">2783</a>	CW315	ROSE	SUSAN, R	OR0186505	Missed	03/28/2022 12:00 AM			
<a href="#">2791</a>	CW315	ROSE	SUSAN, R	OR0186505	Missed	03/28/2022 12:00 AM			

# RMS Survey – Activity Details Section

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This is where you'll be asked to select the **type** of work you were doing at the time of the survey.

## ACTVD - Activity Details

3.1 What type of activity were you doing at the time of the survey? \*

- A program/case related work activity.
- A non-program work activity.
- Not doing a work related activity.
- Participating in a training.

The selections you choose in this section will route you to the next appropriate questions.

# Branch Coordinator Selections

Branch Coordinators only have access to complete surveys for participants that were NOT doing a Case/Program specific activity, which includes the following examples:

- Not working at the time of the survey.
- On a break or on lunch.
- Participating in a general training.
- Participating in a meeting not related to a case or specific program/service.

## BC/CC - Branch Coordinator and Central Coordinator Section

2.1 Please select the activity that best describes what the participant was doing at the time of the survey, or explains their current status. \*

- On a 10-20 minute work Break.
- Taking a lunch break.
- Not scheduled to work at the time of the survey.
- Out of the office on Leave.
- Doing general administrative/clerical office work, NOT related to a specific program activity or case.
- Participating in a Training.
- Moved to a different office/program/position.
- No longer works for the program/agency.
- Currently on rotation.
- The participant is a temporary employee/limited duration and should not be surveyed.
- The participant is currently in an RMS Primary Branch Coordinator Role and should not be surveyed.




# Things to Know and Remember

# Survey Status Bar

As you progress through the survey, the status bar will tell you what survey section you are in, and how many sections are remaining, before the survey is complete.

**Survey - AAAV10** Save Cancel



**ACTD - Activity Details**

3.1 What type of activity were you doing at the time of the survey? \*

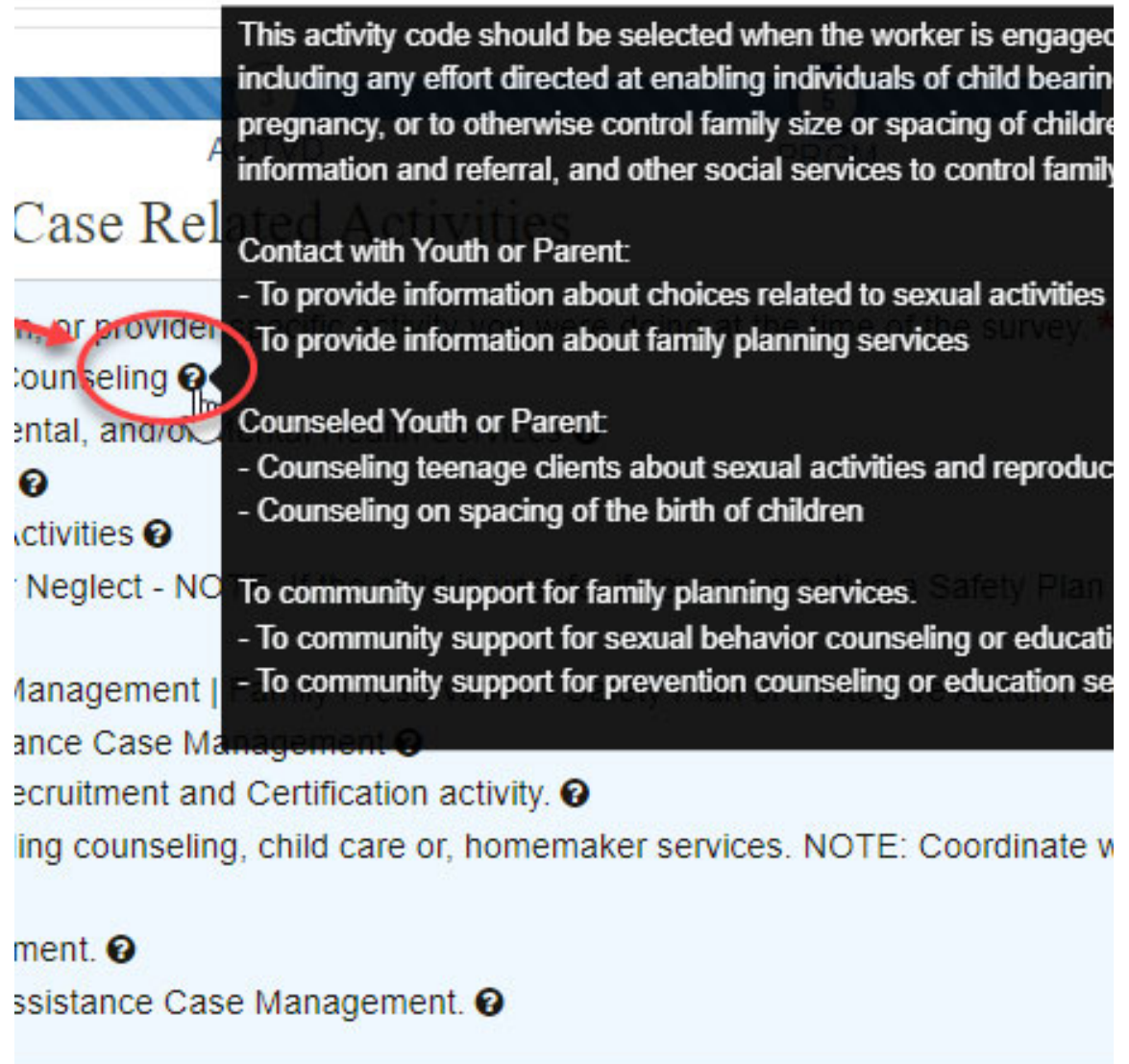
- I was doing a client specific/program related activity.
- I was doing a non-client specific/non-program activity.
- I was not doing a work activity.

← Previous Next →

# 'Help Text'

The surveys include 'Help Text' which will provide further information about the specific activity selection.

If you see a black circle with a white question mark in the center, that is the icon for 'Help Text'. By clicking on the icon, the 'Help Text' will appear.



This activity code should be selected when the worker is engaged including any effort directed at enabling individuals of child bearing pregnancy, or to otherwise control family size or spacing of children information and referral, and other social services to control family

### Case Related Activities

Contact with Youth or Parent:

- To provide information about choices related to sexual activities
- To provide information about family planning services

Counseled Youth or Parent:

- Counseling teenage clients about sexual activities and reproductive
- Counseling on spacing of the birth of children

Neglect - NO

To community support for family planning services. Safety Plan

- To community support for sexual behavior counseling or education
- To community support for prevention counseling or education services

Management

Recruitment and Certification activity. ?

ing counseling, child care or, homemaker services. NOTE: Coordinate with

ment. ?

Assistance Case Management. ?



# Questions that Require Responses

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Survey questions that have the red asterisk (\*) are required and must be answered before you can move on to the next question.

3.1 What type of activity were you doing at the time of the survey? \*

- A program/case related work activity.
- A non-program work activity.
- Not doing a work related activity.
- Participating in a training activity.

# 'Late' Surveys

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If you  
don't  
complete  
the survey  
on the  
first day...

- The status of the survey will turn to '**Late**', which is your indication that you only have one more day to complete it before it becomes unavailable.
- A '**Late**' email notification will be sent to you and your primary branch coordinator advising that the survey needs to be completed before the end of the day, before it becomes 'Missed'.

# Meeting the Survey Deadline

- ✓ Federal guidelines stipulate that the surveys need to be completed within two business days (excluding holidays and weekends).
- ✓ If the deadline is missed, it becomes Missed and can't be included in the cost allocation process. If you've missed a survey, please contact our Central RMS Coordinator Office as soon as possible at [RMSS@odhsoha.oregon.gov](mailto:RMSS@odhsoha.oregon.gov) for assistance.
- ✓ Each completed survey can potentially bring in thousands of dollars in Federal funds for your specific program, so, **every survey counts!**

# Updating Saved Surveys

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Once the survey is 'Saved and Submitted', the survey can no longer be accessed.

If a correction is needed, please contact the Central RMS Coordinator office at [RMSS@odhsoha.oregon.gov](mailto:RMSS@odhsoha.oregon.gov) to request assistance in updating the survey.

# Remember...

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Surveys saved in 'Save Draft' mode still must be completed within the two-day allotted time frame.

Be sure to go back in and complete it by answering all required questions, and then 'Saving and Submitting' the survey before the two days are up.

# Junk Mail

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Occasionally, RMS email notifications are flagged and redirected to our junk mail folders, preventing the notifications from hitting our inboxes.

For this reason, we encourage all RMS survey participants to frequently check their junk email inbox for survey notifications. We also recommend that you update your 'Safe Sender' list in your Outlook settings to ensure RMS related emails are delivered to your inbox.

If you need instructions for updating your 'Safe Sender' list, please contact [RMSS@odhsoha.Oregon.gov](mailto:RMSS@odhsoha.Oregon.gov).

# Branch Coordinators

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Branch coordinators are a valuable resource and should be your first point of contact for assistance when you can't figure things out.

Always be in communication with them; they can make your RMS life a whole lot easier.





# Accuracy is Crucial

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The activity selections are a fundamental element in allocating costs to their matching funding sources.

It's crucial that you select the activity that *best* resembles the task you were performing at the scheduled date and time of the survey.

To ensure accuracy, do the survey as soon as possible...the longer you wait, the harder it is to remember what you were doing.



# Technical Assistance

Anytime you experience technical issues accessing or completing a survey, please contact:

- Your local branch coordinator(s), and/or,
- Our RMS Central Coordinator Office at [RMSS@odhsoha.oregon.gov](mailto:RMSS@odhsoha.oregon.gov).

NOTE: If we determine that your issue is not RMS related, we will recommend that you contact the ODHS Service Desk at (503) 945-5623.



### **Primary Branch Coordinators and Back-up Coordinators**

Contact your local branch coordinator(s) for assistance; they can answer most of your questions and help you resolve simple issues.

They can also complete surveys for you if you're out of the office at the time of the survey.



### **RMS Central Office**

Please contact [RMSS@odhsoha.oregon.gov](mailto:RMSS@odhsoha.oregon.gov) for:  
Training materials.

Survey and system support.

# RMS Tools and Resources



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*Thank you for being an active and supportive participating member of our RMS community; we look forward to working with you!*