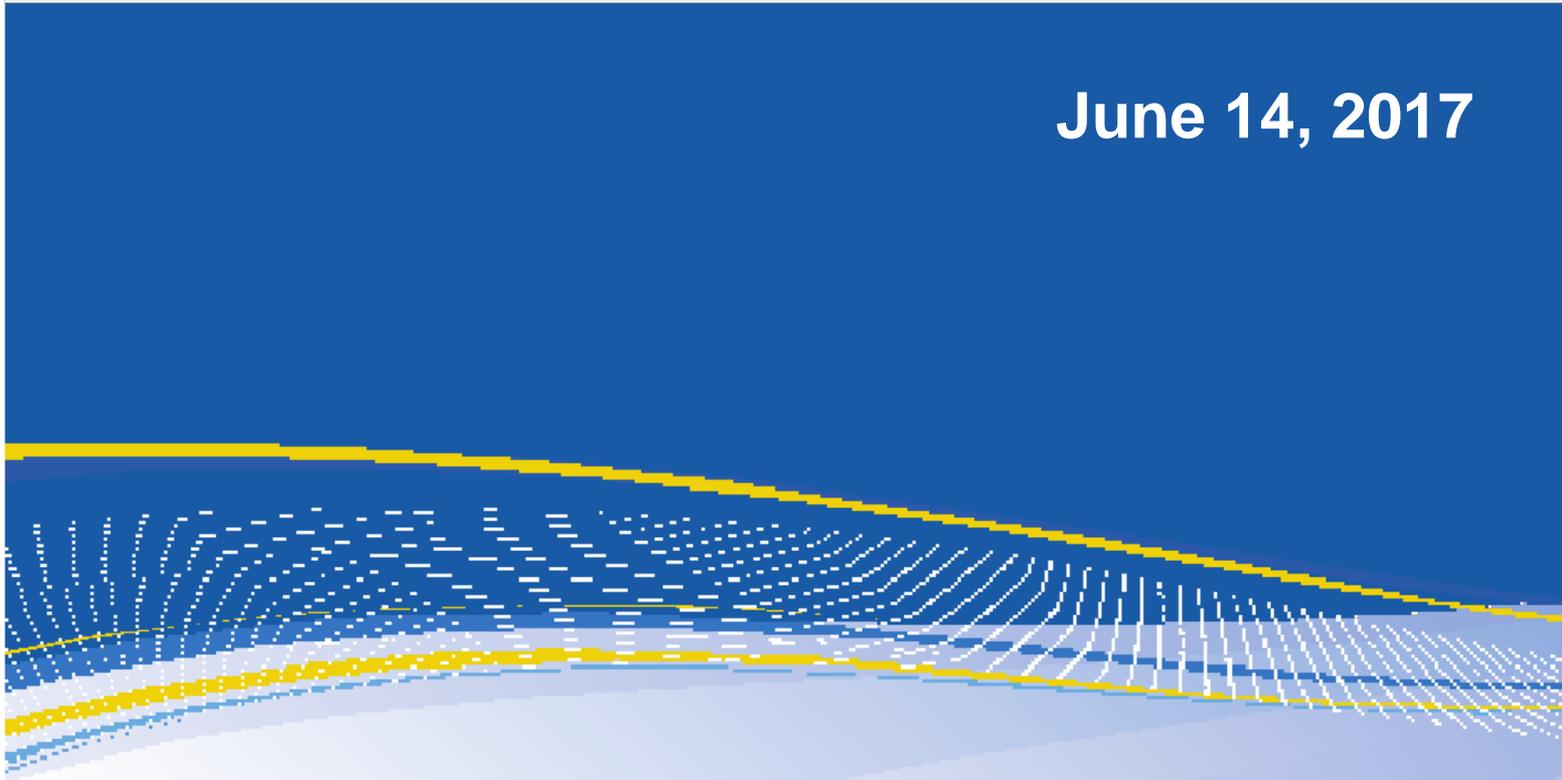




Home and Community-Based Settings Statewide Transition Plan (STP) website

June 14, 2017



Overview

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Introduction

- The Home and Community-Based Settings Statewide Transition Plan website (HCBS STP website) is the same site states have been accessing to upload and submit their STPs and related documents to CMS.
- The milestone feature was added in order to facilitate the tracking of state milestones through March 2019.

Logging on to the HCBS STP website

[pages 2-3 of the State User Guide]

- Section 2 of the user guide details the process for logging on to the website.
- Type <https://norc.sharepoint.com/sites/hcbs/xx>
 - Enter your state's two-letter state abbreviation in lieu of the **xx** above
 - For example, for California the URL is <https://norc.sharepoint.com/sites/hcbs/ca>
- If you have trouble logging on to the website, please reach out to the Helpdesk via HCBSSTPWebsiteHelpdesk@norc.org

• Updating state contact information

[pages 4-6 of the State User Guide]

- Section 3 of the state user guide provides information on updating the contact persons for the HCBS STP website.
- If you have staff that leave or new staff join the state team, you may need to add or change a contact person. These are the individuals who will receive updates and alerts from the website related to milestones.
- States can provide up to two designated contacts for the HCBS STP website.

Milestone summary

[pages 11-13 of the State User Guide]

- Section 5 of the user guide provides general information on the overall milestone process. This section also explains the state milestone summary page, which provides a listing and details of all milestones for your state.
- To find this page, click the “Milestone” option on the left side of the main page (after logging on).
- Note: If you notice—after the milestones are input into the system—a need for corrections, please email the helpdesk directly, HCBSSTPWebsiteHelpdesk@norc.org.

Edit Milestone Tool:

Requesting milestone status changes

[pages 14-15 of the State User Guide]

- States may submit a request to CMS to change the status of a milestone.
- Section 5.2 of the user guide details how states can make a request to change the status. The status change types include:
 - Completed
 - Delayed
 - Revised

Edit Milestone Tool:

Requesting milestone status changes

[pages 15-16 of the State User Guide]

- States access the “Edit Milestone Tool” from the “State Milestone Summary” page, and can edit the following fields:
 - Requested Status Change
 - Delayed Due to Public Notice (for Delayed requests)
 - Requested New Due Date (for Delayed requests)
 - Supporting Evidence
- These four fields belong to the state—no other users can edit them.

Edit Milestone Tool: Providing Clarification to CMS [page 16-18 of the State User Guide]

- In some instances, CMS may request additional clarification on a milestone status change request.
- Section 5 of the user guide also provides information on how to respond to requests for clarification, using the “Edit Milestone Tool.”
- The state provides additional clarification through the Supporting Evidence field. States may also attach documents using the “Attach File” button.

State Milestone Report Function

[page 19 -21 of the State User Guide]

- Section 5.3 describes the state milestone reporting function.
- The State Milestones Report function allows states to download an Excel spreadsheet with a complete list of milestones.
- This spreadsheet will include most of the information contained in the State Milestone Summary dashboard of the website.

Other Milestone Features

[page 22 of the State User Guide]

- The user guide also provides information on a few other features related to state milestones. Specifically, states can:
 - view details of the milestone in a pop-up window, or
 - review the timeline of a particular milestone.

Automated Email Alerts

[page 23 of the State User Guide]

- To assist states in managing milestone timelines, the HCBS STP website sends automated email alerts.
- States will receive an alert when:
 - A milestone is due within 30 days
 - A milestone is 30 days past due (and an additional alert every 30 days thereafter)
 - CMS has questions requiring clarification
 - CMS has approved or not approved your milestone change request

Accessing the HCBS STP Website Helpdesk

[page 24 of the State User Guide]

- Section 6.2 of the user guide provides the email address for the HCBS STP Website Helpdesk: HCBSSTPWebsiteHelpdesk@norc.org. If you have issues logging on to the website, you will be prompted to email the Helpdesk.
- Please reach out to the Helpdesk if you are having technical issues with the website such as difficulty logging on, or if you need your password reset. The Helpdesk can also assist in uploading documents or assist in technical questions related to submitting milestone status change requests.

Questions

- Questions on the user guide or presentation?
- Specific questions on website access can be directed to the HCBS STP Website Helpdesk at HCBSSTPWebsiteHelpdesk@norc.org. Someone from NORC will contact you as soon as possible to provide assistance.