

SDIS Eligibility Processing Data Portal Updates

[Slide 1] Hello and thank you for reviewing this video in which we will describe and demonstrate the recent SDIS Eligibility Processing data portal updates.

[Slide 2] We have three objectives for this demonstration video:

First, we will provide an overview of the recent updates to the Eligibility Processing data collection portal, which includes the addition of new data validation features.

We will then provide a demonstration showing the new data validation features in the Eligibility Processing data collection portal and how to submit Eligibility Processing data when a soft-warning flag is triggered.

Lastly, we'll highlight available Eligibility Processing data resources.

[Slide 3] Now we'll provide an overview of the Eligibility Processing data portal updates.

[Slide 4] CMS has added two new types of validations, including hard validation checks and soft warning flags, to the Eligibility Processing data collection portal.

Hard validation checks identify errors in the data that must be corrected prior to report submission. States will not be able to save or submit their report if a hard validation check is triggered. If a hard validation check is triggered, the field will be highlighted in red, and an error message will appear explaining the reporting requirements and asking states to review their data.

Soft warning flags identify unexpected values in the data. If a soft warning flag is triggered, a warning message, highlighted in yellow, will appear asking the states to use the "Notes" field to provide an explanation of their data reporting. States are still able to submit their report if a soft warning flag is triggered.

States will see the new validation features in all new Eligibility Processing data submissions, including original and updated reports and when making any revisions to previous data submissions.

[Slide 5] In these next slides, first we'll review the old validation features in the original and updated renewal outcomes reports. These are the validation features states are used to seeing in the portal which have now been retired and replaced with the new validation features. Then we'll show how these compare to the new validation features in each report.

The old validation features included one hard validation check and two soft warning flags applicable to the Eligibility Processing data reports. A hard validation check, meaning the report couldn't be submitted if it flagged, was triggered if the "as of date" field in the

updated report was not entered or selected. A soft warning flag, meaning the report could still be submitted if the warning message appeared, was triggered if the values entered for M5a, M5b, M5c, and M5d did not sum to the value entered for M5 or if the values entered for M5a1 and M5a2 did not sum to the value entered for M5a. These soft warning flags were applicable only to original reports.

[Slide 6] Now we will walk through each of the new validation features.

In the original reports, the two validation features regarding sub metrics summing to the parent metric will be hard validation checks rather than soft warning flags.

Hard validation checks will be triggered if the values entered for renewal outcomes, M5a, M5b, M5c, and M5d, do not sum to the value entered for M5, the total due; or if the values entered for M5a1, those renewed on an ex parte basis, and M5a2, those renewed using a renewal form, do not sum to the value entered for M5a, the total renewed. Additionally, a hard validation will trigger if states report a value for metric 5d, referred to as pending renewals, that is larger than the value reported for the renewal backlog, metric 7.

Soft warning flags will trigger if a state reports a 0 value or leaves the field blank for metrics 4, 5, 5a, 5a1, 5a2, 5b, or 5c. A soft warning flag will also trigger for metric 5d if a state leaves the field blank.

[Slide 7] In the updated reports, a hard validation check will be triggered if the values entered for M5a, M5b, M5c, and M5d do not sum to the value entered for M5 or if the values entered for M5a1 and M5a2 do not sum to the value entered for M5a. Additionally, hard validation checks will be triggered if the "as of date" is not selected or if the checkbox confirming that the "as of date" is correct is not checked. The expected "as of date" is now prepopulated for state review and confirmation based on the Eligibility Processing Data Report Specifications, but the state can modify it if needed.

Soft warning flags will be triggered if a state reports a 0 value or leaves the field blank for metrics 5, 5a, 5a1, 5a2, 5b, or 5c or if a state leaves metric 5d blank. Additional soft warning flags will be triggered if the value for metric 5, submitted in the original report, differs from the value for metric 5 submitted in the updated report or if the values for metrics 5a1, 5b, or 5c are greater in the original reports than the values reported in the updated reports.

[Slide 8] Here we have an example from a test environment of the portal showing what report submitters can expect to see if a hard validation check is triggered. If a hard validation check is triggered, the field will be highlighted in red; and an error message will appear explaining the triggered hard validation check and asking the submitter to review their data.

[Slide 9] On this slide, we have an example showing what report submitters can expect to see if a soft warning flag is triggered. If a soft warning flag is triggered, the field will be highlighted in yellow, and the warning message will appear asking the submitter to use the "Notes" field to explain their reporting.

Next, let's transition to a demonstration of the new Eligibility Processing data validation features.

[Demonstration] For today's demonstration, I'm going to use a test environment of the portal. This test environment does have the same look and feel as the production environment that states use to submit Eligibility Processing data. I'm going to log in using my test state credentials.

I'm using a test account that is associated with Puerto Rico with fake data added for demonstration purposes only. Since this is a test environment, this demonstration will not impact any existing report submissions in any way.

Once you log in, you're taken to this Overview page; and then you navigate to the "Eligibility Processing Reports" tab.

First, I'm going to navigate to an original monthly report. In order to show a blank report, I cleared out the data from a previously-submitted reporting period. All validation features are applicable to both current and historic reporting periods, as well as initial submissions and resubmissions, so any relevant error or warning messages will still appear.

I'm going to scroll past the PRA disclosure statement and the instructions for the report to the "Renewals and Outcomes" section. For this hypothetical example, I'm going to populate 20,000 for metric 5 and 0 for metrics 5a, 5a1, 5a2, 5b, and 5c. I will leave 5d blank.

As you can see, there is now an error message indicating that the amount reported in metric 5 must equal the sum of metrics 5a, 5b, 5c, and 5d in order to save or submit the report; and the field is highlighted in red.

Scrolling down if I click the "Save" button, I'm taken back to this error message and can't submit the report.

Additionally, the fields for metrics 5a, 5a1, 5a2, 5b, 5c, and 5d are all highlighted in yellow; and there are warning messages asking that I use the "Notes" field to explain why a zero value is reported for these fields or the field is left blank.

Note that this warning message will automatically appear for metrics 4, 5, 5a, 5a1, 5a2, 5b, 5c, and 5d when a new original report is opened and the data has not yet been populated in

these fields. If I populate 5,000 for metrics 5a, 5b, 5c, and 5d, as well as 2,500 for both 5a1 and 5a2, we'll see that all error messages are resolved.

So as you can see here, all of the hard validations and soft warning language has resolved, and I can now save the report.

Now I'm going to navigate to the updated report for the same reporting period.

First, I want to highlight that the "as of date" field is now prepopulated with the expected "as of date" for the reporting period based on the Eligibility Processing Data Specifications. States should modify this field only if they used a different "as of date" for their updated data. Additionally, to submit the updated report, there is now a checkbox that submitters are required to select confirming that the "as of date" is correct.

For this hypothetical example, I'm going to populate 10,000 for metric 5; 3,000 for metrics 5a, 5b, 5c; and 1,000 for metrics 5a1, 5a2, and 5d.

There is now an error message indicating that the amount reported on updated metric 5a must equal the sum of metrics 5a1 and 5a2. I'm going to populate 1,500 for metrics 5a1 and 5a2.

As you can see, the hard validation check is no longer triggered. However, there is a soft warning flag being triggered for metric 5 since the updated value for metric 5 differs from the metric 5 value populated in the original report. I'm going to populate the "Notes" field with "Updated metric 5 value reflects corrections."

The warning message is still triggered, but since I have provided an explanation of my data reporting and confirmed the updated value for metric 5 is accurate, I can go ahead and select "Submit" to submit the report.

And if I filter back to that reporting period, we can see here that the original "Last Saved" is today's date, 7/14, as well as the updated "Last Saved" is also today's date.

This concludes our demo, and I will now return back to the presentation.

[Slide 11] This slide includes links to the most recent Eligibility Processing Data Specifications, as well as a link to the data submission portal. If you have any questions about the new portal validation features, please reach out to EPDataSupport@mathematica-mpr.com.

Thank you.