Introductory Reference Document for MACPro Roles and Administration

Reflects MACPro Environment as of 2/5/2018

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Introduction

This document describes the steps The Centers for Medicare & Medicaid Services (CMS) and state users follow to request, review, approve, or deny roles within MACPro. Steps on role removal and task reassignment are available as well.

- For a list of common terms used in this document, along with their definitions, refer to the Glossary in the Appendix.
- For questions regarding the use of MACPro, please contact the MACPro Help Desk, Monday through Friday, 9:00 am – 7:00 pm Eastern Time via the MACPro Help Desk email address, MACPro_HelpDesk@cms.hhs.gov, or call at 301-547-4688. Alternatively, you can fill out the Request System Help form within MACPro.
- The MACPro Help Desk Team welcomes your suggestions for our training and reference materials. Please contact us with your feedback and comments on this training, or if you need other MACPro assistance.

NOTE: The images in this document are reflective of a training environment; the available options in your environment may differ based on your user role.
What is MACPro?

MACPro is a web-based application for the submission, review, disposition, and management support of Medicaid and Children’s Health Insurance Program (CHIP) initiatives, Quality Measures Reporting, State Plan Amendments (SPA), Waivers, Demonstrations and Advance Planning Documents.

MACPro is the current system being used to improve state reporting and federal review processes, federal program management, and transparency. It also supports data-driven decision making for Medicaid and CHIP programs through online access to data and information.

Obtaining MACPro Access

MACPro is integrated with the Enterprise Portal (EIDM), a CMS shared service. EIDM is an identity management and services system that provides users with access to a variety of CMS applications. An EIDM account ensures that only authorized and registered users can access protected information and systems through the CMS Enterprise Portal. All existing and potential MACPro users, regardless of user role, are required to have an Enterprise Identity Management (EIDM) ID.

There are six steps necessary to obtain access to MACPro.


Note: All state users must request the MACPro State User role. All CMS users must request the MACPro CMS Staff User role, unless otherwise notified

1. Register for an EIDM ID (if you do not already have one)
2. Request the appropriate MACPro User role through the EIDM
   a. All state users must request the “MACPro State User” role in EIDM. All CMS users must request the “MACPro CMS Staff User” role in EIDM, unless otherwise notified.
3. Receive approval for your MACPro User role request (via email)

Steps 4 through 6 are completed via MACPro (https://macpro.cms.gov). Instructions for steps 4 and 5 can be found in the Requesting a Role(s) section in this document.

4. After your MACPro User role in EIDM has been approved, log in to MACPro with your EIDM credentials
5. Request all roles needed in MACPro
6. Receive approval for your MACPro role request(s) (via email)
# Web Browser/Software Requirements for MACPro

The table below provides a list of browsers/software and versions compatible with MACPro.

<table>
<thead>
<tr>
<th>Browser/Software</th>
<th>Version necessary to access MACPro</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Chrome</td>
<td>Google Chrome updates automatically. The most recent version is supported</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE:</strong> Google Chrome is the optimal web browser for using MACPro.</td>
</tr>
<tr>
<td>Mozilla Firefox</td>
<td>Mozilla Firefox updates automatically. The most recent version is supported</td>
</tr>
<tr>
<td>Microsoft Internet Explorer</td>
<td>Version 11</td>
</tr>
<tr>
<td></td>
<td>Users who attempt to access MACPro using Internet Explorer browser versions lower than 11 will see a screen indicating that they are using an unsupported browser. Login will be prevented</td>
</tr>
<tr>
<td>Windows 10</td>
<td>Not applicable. Software does not impact ability to access MACPro</td>
</tr>
<tr>
<td>OS X Yosemite</td>
<td>Not applicable. Software does not impact ability to access MACPro</td>
</tr>
</tbody>
</table>
MACPro User Roles

Roles in MACPro determine in what capacity a user will utilize the application. Distinct roles have been established in MACPro for CMS users, State users, and Business Support users.

It is important to note that the user roles in MACPro differ from roles used in other CMS web-based systems, including EIDM, CARTS, MMDL, and WMS – and for some applications, this is the first time that there are roles.

MACPro State User Roles

This table describes the MACPro roles available to state users. Users must first obtain the MACPro State User role in EIDM to request the roles listed in this table.

NOTE: There are no role sharing limitations for state user roles; therefore, state users may hold more than one of the roles listed below. Additionally, there may be multiple State System Administrators (SSAs) per state.

<table>
<thead>
<tr>
<th>MACPro Role</th>
<th>Role Description</th>
<th>Role Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Director (SDIR)</td>
<td>• Reviews QM reports or submission packages</td>
<td>SSA</td>
</tr>
<tr>
<td></td>
<td>• Certifies and submits the QM report</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Certifies a submission package</td>
<td></td>
</tr>
<tr>
<td>State Editor (SE)</td>
<td>• Creates and updates the QM report, draft or official submission package</td>
<td>SSA</td>
</tr>
<tr>
<td></td>
<td>• Converts Draft packages to Official packages</td>
<td></td>
</tr>
<tr>
<td>State Point of Contact (SPOC)</td>
<td>• Serves as the primary contact for all state submissions</td>
<td>SSA</td>
</tr>
<tr>
<td></td>
<td>• Reviews and may update submission package or QM report content</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Submits Draft and Official submission packages to the State Director and to CMS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Un-certifies QM reports</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Documents and reviews correspondence log entries</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Responds to the RAI/SMI</td>
<td></td>
</tr>
<tr>
<td>State System Administrator (SSA)</td>
<td>• Reviews and dispositions state user role requests</td>
<td>CMS System Administrator (CSA)</td>
</tr>
<tr>
<td></td>
<td>• Reassigns state specific tasks on behalf of users</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Reviews and dispositions role removal requests</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Creates and maintains the State Profile</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Views all system reports for the state</td>
<td></td>
</tr>
</tbody>
</table>
**MACPro CMS User Roles**

This table describes the MACPro roles available to CMS Users. Users must first obtain the **MACPro CMS Staff User** role in EIDM to request the roles listed in this table.

**NOTE:** The CMS System Administrator (CSA) cannot hold any other role in MACPro.

<table>
<thead>
<tr>
<th>MACPro Role</th>
<th>Component</th>
<th>Role Description</th>
<th>Role Approver</th>
</tr>
</thead>
</table>
| CMS Package Approver         | State Plan     | • Evaluates recommended dispositions of approval, including disapproval justification  
                          |                 | • Approves SPA packages                                                                                                                                  | CSA                 |
| CMS Disapproval Coordinator  | State Plan     | • Tailors disapproval notice to the state  
                          |                 | • Assembles disapproval package  
                          |                 | • Coordinates the Official submission package through the CMS senior review and clearance process for recommended disapprovals | CSA                 |
| CMS Package Disapprover      | State Plan     | • Evaluates recommended dispositions of disapproval, including disapproval justification  
                          |                 | • Disapproves SPA packages                                                                                                                               | CSA                 |
| CMS Point of Contact (CPOC)  | State Plan     | • Oversees the review of Draft and Official submissions  
                          |                 | • Assigns and maintains the composition of the review team (selects SRT members)  
                          |                 | • Documents and reviews correspondence log entries  
                          |                 | • Reviews and compiles review team comments  
                          |                 | • Recommends a disposition for an Official submission package  
                          |                 | • Requests submission package clarification (informal)  
                          |                 | • Generated and submits RAI (formal)  
                          |                 | • Tailors approval notice to the state  
                          |                 | • Sets and manages internal milestones and reminders for the SRT, and Sr. Reviewers  
                          |                 | • Oversees the Official submission package through the CMS senior review process for recommended approvals | CMS Role Approver (CRA) |
| CMS Report Admin             | State Plan     | • Requests/views all reports on behalf of CMS Senior staff  
                          |                 | • Views submission packages on behalf of CMS Senior staff                                                                                               | CSA                 |
| CMS Role Approver (CRA)      | State Plan     | • Reviews and dispositions CPOC and SRT role requests  
                          |                 | • Reassigns tasks for the CPOC role  
                          |                 | • Reviews and dispositions role removal requests for CPOC and SRT roles                                                                             | CSA                 |
| CMS Senior Reviewer          | State Plan     | • Requests/views all system reports  
                          |                 | • Evaluates recommended dispositions  
                          |                 | • Reviews the submission package disapproval justification  
<pre><code>                      |                 | • Reassigns tasks for Package Approver/Disapprover, Disapproval Coordinator, Senior Reviewer and CPOC | CSA                 |
</code></pre>
<p>| CMS CO/RO                    | Quality Measures | • CMS Central Office staff with no direct responsibility for implementing and/or administering the quality measurement programs, but who may be interested in state reporting of the measures | CMS CO Admin      |</p>
<table>
<thead>
<tr>
<th>MACPro Role</th>
<th>Component</th>
<th>Role Description</th>
<th>Role Approver</th>
</tr>
</thead>
</table>
| CMS Submission Review Team (SRT)                 | State Plan                                | • Receives package review assignments  
• Reviews and submits comments for Draft and Official submissions  
• Provides assessments for submission package RUs                                                                                                                                                                                                                             | CRA           |
| CMS Subscriber                                  | State Plan                                | • Views read-only versions of state submission packages  
• Subscribes to particular states or areas of interest                                                                                                                                                                                                                              | CSA           |
| CMS System Administrator (CSA)                   | State Plan and Quality Measures           | • Reviews and dispositions user role requests  
• Requests/Views all system reports  
• Reassigns tasks on behalf of the Package Approver/Disapprover, Disapproval Coordinator, Senior Reviewer and CMS CO Admin  
• Reviews and dispositions role removal requests                                                                                                                                                                                                                              | CSA           |
| CMS CO Administrator                            | Quality Measures                          | • CMS Central Office staff with direct responsibility for implementing and/or administering the quality measurement programs  
• Reviews and dispositions CMS CO/RO, Technical Assistance/Analytic Support, and Researcher roles  
• Reassigns tasks on behalf of CMS CO Admin and Technical Assistance/Analytic Support roles                                                                                                                                                                                   | CSA           |

**MACPro Business Support User Roles**

This table describes on the MACPro roles available to users holding the **MACPro Business Support User** role in EIDM.

<table>
<thead>
<tr>
<th>MACPro Role</th>
<th>Component</th>
<th>Role Description</th>
<th>Role Approver</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researcher</td>
<td>Quality Measures</td>
<td>• CMS support user with no direct responsibility for implementing or administering the quality measurement programs, but has CMS-related or approved business needs for which access to state reporting of the quality measures is necessary/required</td>
<td>CMS CO Admin</td>
</tr>
<tr>
<td>Technical Assistance/Analytic Support</td>
<td>Quality Measures</td>
<td>• CMS support user associated with central office quality measurement staff with direct responsibility for helping CMS to implement and/or administer quality measurement programs</td>
<td>CMS CO Admin</td>
</tr>
</tbody>
</table>
User Management Tips

Requesting Roles
1. Users cannot approve their own role requests.
2. All requests for the State System Administrator (SSA) role are routed to CMS for approval.
3. If a user submits a role request, they may not submit an additional request until the pending request is approved or denied.
4. Users can request multiple roles at one time if it agrees with role sharing limitations.
5. CMS Users must enter a Front Line Manager upon their first role request in MACPro.

Removing Roles
1. If a user attempts to request to remove a role and they have a pending task, they will receive a notification. At that point, the user can either complete the task, can go back and reassign the task (depending on the user’s role), or submit the role removal request to have the appropriate administrator reassign the task upon approving the role removal request.
2. If a role approver approves a role removal request, and the requester is the only user in that role, the approver will be notified that the role is now vacant.
3. IMPORTANT NOTE: Removing a role from a MACPro profile is different than discontinuing MACPro access. If a user no longer requires MACPro access, contact the MACPro Help Desk at Macpro_Helpdesk@cms.hhs.gov.

Reassigning Tasks
1. Users can reassign their own tasks to another user, if the recipient has matching role attributes. The following roles can reassign their own task: State Editor, State Point of Contact, State Director, CMS Point of Contact, Senior Reviewer, Package Approver/Disapprover, Disapproval Coordinator, CMS CO Admin, Technical Assistance/Analytic Support.
2. If a task must be unassigned from a user but there is no other appropriate user in MACPro to assign it to, the user will be advised that the task will be unassigned and given the option to cancel or accept.
3. Senior Reviewers can reassign tasks for the following roles: Package Approver, Package Disapprover, Disapproval Coordinator, Senior Reviewer and CMS Point of Contact.
4. IMPORTANT NOTE: All Administrator roles cannot reassign role requests or role removal requests.
5. The Submission Review Team role cannot self-reassign tasks.
General Users: Managing Roles & Tasks

Requesting One or More Role(s)
This section provides instructions for users to request a new role in MACPro.

1. Log in to MACPro with EIDM credentials.

2. Select the **Records** tab from the upper toolbar and then select “**My User Profile**”.

Figure 1: Records tab
3. Select your name.

![My User Profile](image1.png)

Figure 2: Username link

4. Select the “Add or Modify Roles” button in the upper-right corner.

![Add or Modify Roles button](image2.png)

Figure 3: Add or Modify Roles button.
a. Alternatively, select “Related Actions” from the profile toolbar.

![Figure 4: Related Actions link](image)

b. Select “Add or Modify Roles.”

![Figure 5: Add or Modify Roles link](image)
5. Select the appropriate Role, Program, Component, Authority, Office Type, Region, and State from the drop-down menu in the “Add Role(s)” section. Depending on the selections made, additional fields may become available or populate with information. When selecting options for each field, complete the left column first and then the right column.

**NOTE:** CMS roles will need to fill out the Frontline Manager field upon their first role request. Refer to the section in Appendix on how to fill out this field.

![MACPro User Role Request](image)

*Figure 6: Add Role section*
6. Select multiple options under each respective drop-down menu, if applicable.

**NOTE:** Depending on the role selection, drop-down menus that may allow multiple selections include Component, Authority, State/Territory, Office Type, Region.

![Authority drop-down](image-url)

*Figure 7: Authority drop-down*
7. Select the “Add Role” button and then the role request will appear in the “New Role Request” section.

Figure 8: Add Role button

Figure 9: New Role Request action
8. If adding multiple roles, fill out the “Add Role” section again with the desired role and select the “Add Role” button again.

![Add Role section](image)

Figure 10: Add Role section

9. If necessary, select the red “x” icon to remove a role request.

![New Role Request](image)

Figure 11: Red “x” link to remove a role request
10. Select “Check Validation” in the bottom-right corner once all required fields are completed.

![New Role Request Table]

If validation errors are present, they will be listed below the New Role Request table. All validation errors must be fixed before the role request can be submitted.

![Figure 13: Validation error]
12. Select the “Request” button once all validation errors have been resolved.

![New Role Request table](image)

**Figure 14: Request button**

13. Select “Yes” to the confirmation prompt.

![Confirmation prompt](image)

**Figure 15: Yes button in prompt**
Modifying Current Roles
This section provides instructions on how users can modify their current roles.

1. Select the **Records** tab from the upper toolbar and then select "**My User Profile.**"
2. Select your name.

![Image of My User Profile with username link](image17.png)

Figure 17: Username link

3. Select the “Add or Modify Roles” button in the upper-right corner.

![Image of My User Profile with Add or Modify Roles button](image18.png)

Figure 18: Add or Modify Roles button
a. Alternatively, select “Related Actions” from the profile toolbar.

![Figure 19: Related Actions link](image)

b. Select “Add or Modify Roles.”

![Figure 20: Add or Modify Roles link](image)
4. Select “Modify” under the “Current Role(s)” table.

![MACPro User Role Request](image1)

Figure 21: Modify link

5. Update fields as necessary under the “Modify Role(s)” section.

![Modify Role](image2)

Figure 22: Modify Role section
6. Select “Modify Role” once the fields are updated.

**NOTE:** The “Modify Role” button will not become active until a field is updated.

![Modify Role button](image)

**Figure 23: Modify Role button**

7. Select “Check Validation” at the bottom-right corner. All validation errors must be resolved before the role request can be submitted.

**NOTE:** If a user submits a modification request for a role that has an open and accepted task, a validation error will appear stating that the role cannot be requested due to open tasks. Complete all open tasks and try again.

![Modification Request](image)

**Figure 24: Check Validation button**
8. Select the “Request” button once all validation errors are resolved.

![Modification Request](image)

Figure 25: Request button

9. Select “Yes” to the confirmation prompt.

![Confirmation Prompt](image)

Figure 26: Yes button in Prompt
Removing a Role

This section provides instructions on how users can remove a current role in MACPro.

1. Select the **Records** tab from the upper toolbar and then select "My User Profile."

![Figure 27: My User Profile link]
2. Select your name.

![Image of My User Profile](image1.png)

Figure 28: Username link

3. Select the “Add or Modify Roles” button in the upper-right corner.

![Image of Add or Modify Roles button](image2.png)

Figure 29: Add or Modify Roles button
a. Alternatively, select “Related Actions” from the profile toolbar.

![Related Actions link](image)

Figure 30: Related Actions link

b. Select “Add or Modify Roles.”

![Add or Modify Roles link](image)

Figure 31: Add or Modify Roles link
4. Select “Remove” in the “Current Role(s)” table.

![Current Role(s)](image)

Figure 32: Remove link

5. Select “Check Validation” in the bottom-right corner. All validation errors must be resolved before a role request is submitted.

![Removal Request](image)

Figure 33: Check Validation button
6. Select “Request” once all validation errors are resolved.

![Removal Request](image)

Figure 34: Request button

7. Select “Yes” to the confirmation prompt.

![Confirmation Prompt](image)

Figure 35: Yes button in Prompt
Reassigning Tasks

This section provides instructions on how users can reassign an accepted task to another user.

NOTE: To reassign a task to another user, the task recipient must have matching role and authority attributes.

1. Select the Records tab from the upper toolbar and then select "My User Profile."

![Figure 36: My User Profile link]
2. Select your **name**.

![My User Profile](image)

**Figure 37: Username link**

3. Select **“Related Actions”** from the profile toolbar.

![Related Actions](image)

**Figure 38: Related Actions link**
4. Select “Reassign My Tasks.”

![Reassign My Tasks link]

5. Select a “Component” option, if applicable.

![Component radio buttons]

![Task Reassignment table]
6. Select the icon under the “Details” column of the “Tasks” table for the applicable task.

![Figure 41: View Details icon](image)

7. Select the “Get Available Assignees” button under the “Selected Tasks Details” section.

![Figure 42: Get Available Assignees button](image)
8. Select an Assignee from the “**New Assignee**” drop-down menu that appears.

![New Assignee drop-down](image)

Figure 43: New Assignee drop-down

9. Select the “**Reassign Task**” button in the bottom-right corner.

![Reassign Task button](image)

Figure 44: Reassign Task button
10. Select “Yes” to the confirmation prompt.

![Figure 45: Yes button in Prompt](image)

11. When the **Confirmation of Reassignment** screen appears, select either the “Exit” button or “Return to Task Reassignment” button to exit.

![Figure 46: Confirmation of Reassignment screen](image)
12. Once the task is reassigned, the task recipient will receive an email notification.

Following task has been re-assigned by Jane Jones

**Task Information:** Review and Edit Report: Child Quality Measure (KS2017CQ0011O)

- **Workstream:** QMR
- **State:** KS
- **Status:** In Review
- **Original Assignee:** Jane Jones (JANEJONES)
- **New Assignee:** Jenny James

Figure 47: Task Reassignment notification
Administrator Users: Managing Users’ Roles & Tasks

This section provides instructions for administrator users to approve or deny role requests and role removal requests. Steps on reassigning tasks for other roles are also included.

State Approval Hierarchy

Note: if a state does not have an SSA, all requests go to the CSA

Figure 48: State Approval Hierarchy
CMS Approval Hierarchy

Figure 49: CMS Approval Hierarchy
Approving or Denying a Role Request

This section provides instructions on how administrator users can approve or deny a role request in MACPro. The following roles can approve or deny a role request in MACPro: CMS System Administrator (CSA), CMS Role Approver (CRA), CMS CO Administrator (CCA), and the State System Administrator (SSA).

1. When there is a new role request awaiting approval, eligible approvers will receive an email notification. At the end of each day, an additional notification will be sent to approvers if there is a request that no one has added to their queue. Access the request using one of the following two options:

   a. Click on the "View Role Requests" link in the email notification.

   Hello,

   There are new role requests awaiting your approval.
   To access the Role Approval action, navigate to the Actions tab in MACPro, or follow the link below:
   [View Role Requests]

   If you have questions, please contact the MACPro Help Desk.
   [MACPro_HelpDesk@cms.hhs.gov]

   Figure 50: View Role Requests email link
b. Or select the **Actions** tab from the upper toolbar and select “**Role Request Management**.”

![Role Request Management link](image1)

**Figure 51: Role Request Management link**

2. Select the checkbox next to all applicable requests under the “**All Pending Requests**” section. The All Pending Requests pool is visible to all eligible approvers. To approve a request, **one** approver must add the request(s) to their queue and remove it from the general pool.

**NOTE:** A request to add a role will display a “+” icon under the “**Request Type**” column.

![Role request checkbox](image2)

**Figure 52: Role request checkbox**
3. Select the “Add to My Queue” button. Once the request is placed in an approver’s queue, no other role approver may act on the request.

**NOTE:** If an approver has not acted on a role request in their queue by midnight the following day, it will be returned to the general pool.

![Figure 53: Add to My Queue button](image)

4. Select the checkboxes next to each applicable role request under the “My Queue” section.

![Figure 54: Role request checkbox](image)
5. Optional: Select the link in the “Notes/Info” column to provide any reviewer notes to the requester.

**NOTE:** Reviewer Notes will be shown in the email notification sent to the requester, as well as in the requester’s News tab.

![Figure 55: Reviewer Notes field](image)
6. Select the checkbox next to the applicable role request and select “Approve” or “Deny.”

**NOTE:** At this step, users may choose to return the request to the group. If “Return to Group” is selected, it will remove the request from the queue and return to the general pool.
7. Select “Yes” to the approval or denial confirmation prompt.

Figure 58: Yes button in Prompt

Figure 59: Yes button in Prompt
8. Select “Continue” on the action summary confirming the request approval or denial.

![Figure 60: Continue button](image1)

![Figure 61: Continue button](image2)
9. Once the role is approved or denied, an email notification will be sent to the requester.

**Figure 62: Email notification for role approval**

Hello,

Your request for the following role has been Approved:

Request Type: New MACPro Role  
Role Name: State Editor (SE)  
Program: Medicaid  
Component: Quality Measure Reporting (QMR)  
Authority: Maternal and Infant Health Quality Measures (MIHQM)  
Office Type: N/A  
Region: N/A  
State: Indiana

If you have questions, please contact the MACPro Help Desk.  
MACPro_HelpDesk@cms.hhs.gov

**Figure 63: Email notification for role denial**

Hello,

Your request for the following role has been Denied:

Request Type: New MACPro Role  
Role Name: State Point of Contact (SPOC)  
Program: Medicaid  
Component: Quality Measure Reporting (QMR)  
Authority: Maternal and Infant Health Quality Measures (MIHQM)  
Office Type: N/A  
Region: N/A  
State: Wisconsin

If you have questions, please contact the MACPro Help Desk.  
MACPro_HelpDesk@cms.hhs.gov
Approving/Denying a Role Removal Request
This section provides instructions for administrator users to approve or deny a role removal in MACPro. The following roles can approve or deny a role request in MACPro: CMS System Administrator (CSA), CMS Role Approver (CRA), CMS CO Admin (CCA), and the State System Administrator (SSA).

1. When there is a new role removal request awaiting approval, eligible approvers will receive an email notification. At the end of each day, an additional notification will be sent to approvers if there is a request that no one has added to their queue. Access the request using one of the following two options:

   a. Click on the "View Role Requests" link in the email.

   ![Figure 64: View Role Requests email link](image)

   Hello,

   There are new role requests awaiting your approval.

   To access the Role Approval action, navigate to the Actions tab in MACPro, or follow the link below:

   **View Role Requests**

   If you have questions, please contact the MACPro Help Desk.

   [MACPro_HelpDesk@cms.hhs.gov](mailto:MACPro_HelpDesk@cms.hhs.gov)
b. Alternatively, select the **Actions** tab from the upper toolbar and select “Role Request Management.”

![Role Request Management link](image)

Figure 65: Role Request Management link

2. Select the checkbox next to all applicable requests under the “**All Pending Requests**” section. The All Pending Requests pool is visible to all eligible approvers. To approve a request, **one** approver must add the request(s) to their queue and remove it from the general pool.

**NOTE:** A request to remove a role will display a “x” icon under the “**Request Type**” column.

![Role request checkbox](image)

Figure 66: Role request checkbox
3. Select the “Add to My Queue” button. Once the request is placed in an approver’s queue, no other role approver may act on the request.

NOTE: If an approver has not acted on a role removal request in their queue by midnight the following day, it will be returned to the general pool.

4. Select the checkboxes next to each applicable role request under the “My Queue” section.
5. Optional: Select the link in the “Notes/Info” column to provide any reviewer notes to the requestor.

**NOTE:** Reviewer Notes will be shown in the email notification sent to the requester, as well as in the requester’s News tab.

```
<table>
<thead>
<tr>
<th>Requester</th>
<th>Request Type</th>
<th>Role</th>
<th>Program</th>
<th>Component</th>
<th>Authority</th>
<th>Office Type</th>
<th>Region</th>
<th>State / Territory</th>
<th>Request Date</th>
<th>Notes/Info</th>
<th>Title (for Notice)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joe Jones</td>
<td></td>
<td>State Point of Contact (SPOC)</td>
<td>Medicaid</td>
<td>Quality Measure Reporting (QMR)</td>
<td>Maternal and Infant Health Quality Measures (MIHQM)</td>
<td>N/A</td>
<td>N/A</td>
<td>Kansas</td>
<td>2/4/2018</td>
<td>Hide</td>
<td>N/A</td>
</tr>
</tbody>
</table>
```

**Figure 69: Reviewer Notes field**
6. Select the checkbox next to the applicable role request and select “Approve” or “Deny.”

NOTE: At this step, the user may choose to return the request to the group. If the “Return to Group” is selected, it will remove the request from the queue and return to the general pool.
7. Select “Yes” to the approval or denial confirmation prompt.
8. Select “Continue” on the action summary confirming the request approval or denial.

<table>
<thead>
<tr>
<th>Action Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request Approved: Joe Jones - State Point of Contact (SPOC)</strong></td>
</tr>
<tr>
<td><strong>Requestor:</strong> Joe Jones</td>
</tr>
<tr>
<td><strong>Request Type:</strong> Role Removal</td>
</tr>
<tr>
<td><strong>Role Name:</strong> State Point of Contact (SPOC)</td>
</tr>
<tr>
<td><strong>Program:</strong> Medicaid</td>
</tr>
<tr>
<td><strong>Component:</strong> Quality Measure Reporting (QMR)</td>
</tr>
<tr>
<td><strong>Authority:</strong> Maternal and Infant Health Quality Measures (MIHQM)</td>
</tr>
<tr>
<td><strong>Office Type:</strong> N/A</td>
</tr>
<tr>
<td><strong>Region:</strong> N/A</td>
</tr>
<tr>
<td><strong>State:</strong> Kansas</td>
</tr>
<tr>
<td><strong>Reviewer Notes:</strong></td>
</tr>
<tr>
<td><strong>Continue</strong></td>
</tr>
</tbody>
</table>

Figure 74: Continue button

<table>
<thead>
<tr>
<th>Action Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request Denied: Joe Jones - State Point of Contact (SPOC)</strong></td>
</tr>
<tr>
<td><strong>Requestor:</strong> Joe Jones</td>
</tr>
<tr>
<td><strong>Request Type:</strong> Role Removal</td>
</tr>
<tr>
<td><strong>Role Name:</strong> State Point of Contact (SPOC)</td>
</tr>
<tr>
<td><strong>Program:</strong> Medicaid</td>
</tr>
<tr>
<td><strong>Component:</strong> Quality Measure Reporting (QMR)</td>
</tr>
<tr>
<td><strong>Authority:</strong> Adult Quality Measures (AQM)</td>
</tr>
<tr>
<td><strong>Office Type:</strong> N/A</td>
</tr>
<tr>
<td><strong>Region:</strong> N/A</td>
</tr>
<tr>
<td><strong>State:</strong> Kansas</td>
</tr>
<tr>
<td><strong>Reviewer Notes:</strong></td>
</tr>
<tr>
<td><strong>Continue</strong></td>
</tr>
</tbody>
</table>

Figure 75: Continue button
9. Once the role removal request is approved or denied, an email notification will be sent to the requester, including the approver’s notes.

Hello,

Your request for the following role has been Approved:

Request Type: New MACPro Role  
Role Name: State Editor (SE)  
Program: Medicaid  
Component: Quality Measure Reporting (QMR)  
Authority: Maternal and Infant Health Quality Measures (MIHQM)  
Office Type: N/A  
Region: N/A  
State: Indiana

If you have questions, please contact the MACPro Help Desk.
MACPro_HelpDesk@cms.hhs.gov

Figure 76: Email notification for role approval

Hello,

Your request for the following role has been Denied:

Request Type: MACPro Role Removal  
Role Name: State Director (SDIR)  
Program: Medicaid  
Component: Medicaid State Plan (MSP)  
Authority: All  
Office Type: N/A  
Region: N/A  
State: Missouri

If you have questions, please contact the MACPro Help Desk.
MACPro_HelpDesk@cms.hhs.gov

Figure 77: Email notification for role denial
Reassigning Users’ Tasks
This section provides instructions for administrator users or Senior Reviewers to reassign tasks for other users. The following roles can reassign a task on behalf of other users in MACPro: CMS System Administrator (CSA), CMS Role Approver (CRA), CMS CO Admin (CCA), Senior Reviewer, and the State System Administrator (SSA).

1. Select the **Actions** tab and then select “**Task Reassignment**.”

![Task Reassignment link](image)

Figure 78: Task Reassignment link
2. Search for the applicable task by using the available “Filters”.

![Filters section]

Figure 79: Filters section

3. All tasks held by users managed by the admin role will appear in a table. Select the icon under the “Details” column to view a task.

NOTE: This list may differ based on the administrator or approver role. All requests are routed based on certain matching attributes.

![View Details icon]

Figure 80: View Details icon

4. Select the “Get Available Assignees” button under the “Selected Tasks Details” section.

![Get Available Assignees button]

Figure 81: Get Available Assignees button
5. Select an assignee from the “New Assignee” drop-down menu that appears.

6. Select “Reassign Task” in the bottom-right corner.
7. Select “Yes” in the confirmation prompt.

![Figure 84: Yes button in prompt](image)

8. When the Confirmation of Reassignment screen appears, select either the “Exit” button or “Return to Task Reassignment” button to exit.

![Figure 85: Confirmation of Reassignment screen](image)
Appendix
The appendix contains instructions on additional actions users may take in MACPro.

Glossary
This table provides common terms used throughout this document along with their definitions.

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute</td>
<td>Describes the various access a user role has. Attributes include Program, Component, Authority, Region, State/Territory, and Office Type.</td>
</tr>
<tr>
<td>Authority</td>
<td>The section within a Component. Under the Components of Quality Measures (QMR) or Medicaid State Plan (MSP), there are various Authorities such as Adult Quality Measure, Medicaid and CHIP Child Quality Measures, Health Homes SPA, MAGI Eligibility, or Administration.</td>
</tr>
<tr>
<td>Component</td>
<td>Describes a program section available within MACPro. The two Components currently available in MACPro are Quality Measures Reporting and Medicaid State Plan.</td>
</tr>
<tr>
<td>Deactivation</td>
<td>The act of revoking a user's access to MACPro. Users cannot complete this action themselves and must contact the MACPro Help Desk for further guidance.</td>
</tr>
<tr>
<td>Program</td>
<td>Section of MACPro that designates what the user is reporting on. Available Programs are CHIP or Medicaid. Users can select various Components and Authorities under a Program.</td>
</tr>
<tr>
<td>Role Removal</td>
<td>The feature in MACPro that allows users to request to remove a current role from their user profile in MACPro while remaining active in the system.</td>
</tr>
<tr>
<td>Task Reassignment</td>
<td>The feature of MACPro that allows specific users to reassign an accepted task to another user. This feature also allows certain roles holding administration and approver capabilities to reassign tasks on behalf of other users.</td>
</tr>
<tr>
<td>User Management</td>
<td>The section of MACPro that includes all features related to roles and administration. This includes role requesting, role removal, approving or denying role requests or role removal requests, self-task reassignment, and task reassignment for users.</td>
</tr>
<tr>
<td>User Profile</td>
<td>The section of MACPro that includes all information related to the user information, roles, and attributes. The user information included in the user profile is populated from EIDM.</td>
</tr>
</tbody>
</table>

Adding Front Line Manager

Adding a Front Line Manager is an action for CMS Users only. The Front Line Manager field is for records purposes and does not have an impact on who approves a CMS user role within MACPro.

**NOTE:** CMS Users are required to enter a Front Line Manager before requesting a role.

1. Select the “**Records**” tab from the upper toolbar and select **“My User Profile.”**
2. Select your name.

![Username link](image1.png)

**Figure 87: Username link**

3. Select the *“Edit Front Line Manager”* button in the upper-right corner.

![Edit Front Line Manager button](image2.png)

**Figure 88: Edit Front Line Manager button**
a. Alternatively, select “Related Actions” from the profile toolbar and select “Edit Front Line Manager”.

Figure 89: Edit Front Line Manager link

4. Enter the Front Line Manager’s First and Last Name in the appropriate text boxes. Select “Submit.”

Figure 90: Submit button
5. Edits made to the Front Line Manager field will be reflected in the user profile.

![Figure 91: Front Line Manager listed under Records tab Summary view](image)

6. If a CMS user attempts to request a role before the Front Line Manager has been captured, a validation error will appear.

![Figure 92: Validation error](image)
Viewing Your User Profile

This section provides instructions on how to view your MACPro User Profile.

1. Select the “Records” tab from the upper toolbar and select “My User Profile.”

Figure 93: My User Profile link
2. Select your **Name**.

![Figure 94: Username link](image)

3. On this page, Basic Information including First Name, Last Name, Type of MACPro User (EIDM Role), User ID, Email Address, Phone Number, and Front Line Manager (CMS Users only) will populate. A list of Approved Roles in a table will also populate.

![Figure 95: User Profile page](image)
4. Select “Show Advanced Options” to customize the view of approved roles.

![Show Advanced Options link](image)

Figure 96: Show Advanced Options link

5. Check the boxes next to the column titles to show in the Approved Roles table. Available items are State/Territory, Program, Component, Authority, Region, Office Type, Approved By, Date Approved, and Title (for notice).

![Approved Roles section with checkbox options](image)

Figure 97: Approved Roles section with checkbox options
Viewing Other User Profiles

This section provides instructions on how to view the user profiles of other users in MACPro. The following roles can view other profiles:

<table>
<thead>
<tr>
<th>Role</th>
<th>Ability to view CMS User Profiles</th>
<th>Ability to view State User Profiles</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMS System Administrator</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>CMS Role Approver</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>CMS CO Administrator</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>State System Administrator</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

1. Select the **Records** tab from the upper toolbar and select **"My User Profile."**

![Figure 98: My User Profile link under the Records tab](image)
2. Select your name.

3. Select “User Profile Search” from the profile toolbar.
a. Alternatively, if on the Role Request Management screen, select the "User Profile Search" link from the upper-right corner.

![Role Request Management](image)

Figure 101: User Profile Search link

4. There are three different filter views available: "Filter By User", "Filter By Role", and "View All Users". In the "Filter By User" view, the user can search for any user in the system by First Name, Last Name, or Username. A list of users matching this search criterion will appear in a table below.

![User Profile Search buttons to filter views](image)

Figure 102: User Profile Search buttons to filter views
5. To view a user’s profile, select the Username in the “Username” column.

![Username link](image1)

Figure 103: Username link

6. After selecting a username, the user’s **Basic Information** and **Approved Roles** will appear.

![User Profile page](image2)

Figure 104: User Profile page
7. Select “Show Advanced Options,” to customize the view of the user’s approved roles.

![Figure 105: Show Advanced Options link](image)

8. Check the boxes next to the column titles to show in the Approved Roles table. Available items are: State/Territory, Program, Component, Authority, Region, Office Type, Approved By, Date Approved, and Title (for notice).

![Figure 106: Approved Roles section with checkbox options](image)
9. Select the “Filter By Role” view to filter by EIDM Role or by MACPro user roles using the drop-down menu. After selecting “Filter By Role”, repeat steps 5-8 in this section to view a user’s approved roles.

**NOTE:** State System Administrators can only view the State User EIDM role.

![Filter By Role button](image)

**Figure 107: Filter By Role button**

10. Select the “View All Users” button to display a table with all eligible users.

![View All Users button](image)

**Figure 108: View All Users button**
Request System Help (System-Related Inquiries)

The Request System Help link is easily available for MACPro system-related inquiries. The link is located on every page of a report or package. It is also listed as an action under the Actions tab. Should you need system-related assistance at any point when navigating MACPro, just click the link in the upper-right corner of the screen.

Figure 109: Request System Help link
A form will open in a new tab to avoid interrupting work in MACPro. Complete all required fields (marked by asterisks) and then select “Submit Help Request”. Once the form is submitted, the MACPro Help Desk will receive an email with the information included in the form. To help expedite a response to your request, upload screenshots of the issue you are experiencing.

Figure 110: Submit Request button
General Accessibility Guidelines

MACPro users can utilize the ‘Tab’ key to navigate through every data field, image, icon and link within MACPro. Here are the general functions available to users in MACPro:

1. +/- link
   - Selecting this link will expand or collapse particular sections within the application.
2. “View All Responses” button
   - Selecting this button will expand all sections on a page within MACPro.
3. “Save” button
   - Selecting this button will save data you have entered within the application. If you do not receive a red validation error after selecting the save button, the data can be considered successfully saved.
4. Other Action buttons
   - When the user selects any action button like “Cancel” or “Go to Admin Page”, the application will perform the respective function. If you do not receive any errors on the page, the action can be considered successfully completed.

Alternatively, users can use following shortcut keys in JAWS to navigate and take actions:

1. Insert + F7 key
   - By using this key combination, users will be provided with list of all the links on the page. Users can navigate through the list using the arrow keys and take appropriate actions.
2. Insert + F6 key
   - By using this key combination, users will be provided with list of all the headings on the page. Users can navigate through the list using the arrow keys and take appropriate actions.