Medicaid and CHIP Program System (MACPro)

Medicaid State Plan Amendment (SPA) State Introductory Training

Session 1: Thursday, November 8th, 2018
Session 2: Wednesday, November 14th, 2018
Welcome!

- Laurel Holmquist – Presenter
- Lexie Norfleet – Demo Driver
- Katie Nation – Ask Me a Question
- Stephanie Bell – CMS
- Jessica Hickey – CMS
Chat Questions
Meet & Greet

Please introduce yourself:

- Type your name in the chat box
- Let us know what you are hoping to get out of today’s session
- If you hold one, include your current role in the state submission process
Training Expectations

Today’s Training

- Introduction to MACPro
- Understand MACPro State user roles
- Overview of the MACPro Medicaid SPA submission process

Additional User resources will be available on Medicaid.gov
Raise your Hand...

If you have ever used MACPro
Agenda

- Introduction
- MACPro Access
- State User Roles
- State SPA Workflows
- Additional Resources & Help Desk
- Next Steps
Introduction
What is MACPro?

MACPro is a **web-based** system that allows CMS and states to **collaborate more effectively online** in support of Medicaid and CHIP initiatives.
MACPro Functionality

Current MACPro Functionality

- Medicaid State Plan Amendments
  - Health Homes
  - Eligibility
  - Administration (Single State Agency)
- Quality Measure Reporting
Future of MACPro

- Adult and Child Core Quality Measures Reporting
- Additional Medicaid State Plan Amendments (SPA)
- Managed Care Contracts (MCC)
- CHIP Program and SPAs
- Waivers and 1115 Demonstrations
- Advanced Planning Documents (APD)
Transition of SPAs to MACPro

- MACPro currently contains a relatively small portion of State Plan material, and new material will be added in phases over time.
- As new sections of the State Plan become available, new SPA actions on those topics will need to be submitted in MACPro.
As each section of State Plan material becomes available in MACPro, States must submit those SPAs in MACPro.

SPAs already submitted and being processed by CMS will be completed in the existing workflow.

SPAs submitted and approved in MACPro become the official record.
Key Features

MACPro Features

- SPA templates designed with structured data choices and built-in logic
- Tasks
- Automated notifications

System Functionalities

- Submission Packages
- Reviewable Units
- Correspondence Log
- Clarification
- Request for Additional Information (RAI)
- Allow CMS to View
Benefits of MACPro

- Ensure data consistency
- Improves efficiency
- Increases transparency
- Establishes clear communication processes
- Enables data-driven decision making
- Centralizes multiple systems
Questions?
MACPro Access
MACPro Access: What Will I Learn?

- How to obtain access to MACPro
- When each step of the process should be completed
MACPro Access Steps

1. Register for an EIDM ID at the Enterprise Portal using the address: https://portal.cms.gov
2. Login to the Enterprise Portal using the address: https://portal.cms.gov and request access to MACPro
3. Receive approval for your EIDM role request (via email)
4. Log into the MACPro system via the MACPro address (https://macpro.cms.gov) using your EIDM username and password
5. Request your appropriate MACPro roles using the MACPro address: https://macpro.cms.gov
6. Receive approval for your MACPro role request (via email or MACPro Newsfeed)
Enterprise Identity Management (EIDM)

- An identity management and services system providing access to CMS applications

- Users have one EIDM ID for identity proofing across multiple applications

- EIDM CMS Enterprise Portal address (https://portal.cms.gov)

- All State users request “MACPro State User” role

- New users must obtain and request an EIDM role for MACPro
MACPro Roles

- MACPro website: https://macpro.cms.gov
- MACPro roles are unique for CMS, State, and Business Support users
- Information on MACPro roles and functions can be found in the Introductory Reference Document for MACPro Roles and Administration
Obtain MACPro Access

1. Register for an EIDM ID at the Enterprise Portal using the address: https://portal.cms.gov
2. Login to the Enterprise Portal using the address: https://portal.cms.gov and request access to MACPro
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5. Request your appropriate MACPro roles using the MACPro address: https://macpro.cms.gov
6. Receive approval for your MACPro role request (via email or MACPro Newsfeed)
MACPro Access Scenarios

**Scenario 1: New MACPro user without EIDM access or MACPro access:**

- **EIDM ID:** ✗
- **MACPro Access in EIDM:** ✗
- **MACPro Role:** ✗

**Execute Steps 1-6**

**Scenario 2: User has EIDM access, but no access to MACPro:**

- **EIDM ID:** ✓
- **MACPro Access in EIDM:** ✗
- **MACPro Role:** ✗

**Execute Steps 2-6**

**Scenario 3: User has EIDM access and requested MACPro access in EIDM, but no MACPro role:**

- **EIDM ID:** ✓
- **MACPro Access in EIDM:** ✓
- **MACPro Role:** ✗

**Execute Steps 5-6**
MACPro Access: Knowledge Check Question

If I am a state user looking to be a State System Administrator which EIDM role for MACPro do I select?

A. Business Support User
B. State User
C. CMS Staff User
D. Approver
MACPro Access: Knowledge Check Answer

Answer:

B. State User

Unless notified otherwise, all state users should request the State User role in EIDM to obtain access to MACPro.
State User Roles
State User Roles: What Will I Learn?

- Who is involved in the State submission process
- Functions of the MACPro State roles for Medicaid State Plan (MSP)
MACPro State User Roles

- State Editor
- State Director
- State Point of Contact
- *State System Administrator

Roles with an asterisk (*) indicate that the role has administrative functions and must view the MACPro Administrative Roles Training. There are no role sharing limitations for state roles.
MACPro Role: State Editor

State Editor (SE)

Abilities

- Creates content for new submission packages
- Updates submission packages based on feedback from state leadership
- Converts Draft submission packages to Official
- Collaborates with the State Point of Contact (SPOC) on submission package Clarification(s) and Request for Additional Information (RAI) responses

Role Approver

- State System Administrator (SSA)
MACPro Role: State Point of Contact

State Point of Contact (SPOC)

Abilities

- Reviews and updates submission package content
- Submits Draft packages and certifies Official submission packages to CMS
- Serves as the primary contact with CMS for specific package submissions, including Clarification requests and RAI
- Documents, reviews, and communicates with CMS via Correspondence Log entries
- Returns submission packages to the SE when revisions or additional information are needed
- Submits RAI responses to CMS

Role Approver

- State System Administrator (SSA)
MACPro Role: State Director

State Director

Abilities

- Reviews state-prepared submission packages
- Approves (certifies) submission packages for SPOC submission to CMS

Role Approver

- State System Administrator (SSA)
MACPro Role: State System Administrator

State System Administrator (SSA) Abilities

- Reviews and dispositions state user role addition, modification, or removal requests
- Reassigns state specific tasks on behalf of users
- Creates and maintains the State Profile
- Views state system submission package reports

Role Approver

- CMS System Administrator
Questions?
State SPA Workflows
State SPA Workflows: What Will I Learn?

- State User Functionalities
- How states create and submit submission packages in MACPro
- The MACPro state roles involved in the submission process
State User Functionalities

Submission Packages
- Compilation of state plan templates

Reviewable Units
- MACPro version of state plan templates

Dependencies
- If RUs are dependent, a change in one RU will result in a change in another RU
- These are described as primary and secondary RUs

Correspondence Log
- Tool for communication between the State Point of Contact (SPOC) and CMS Point of Contact (CPOC)
Clarification Request
  ▪ Informal information request – Does not stop the 90-day clock

Request for Additional Information (RAI)
  ▪ Formal information request – Does stop the 90-day clock

Approval Notice
  ▪ Notification to the state of approved submission
Upper Tool Bar & Package Navigation Menu

- **Upper Tool Bar:** News, Tasks, Records, Reports, and Actions

- **Package Navigation Menu:**

![Package Navigation Menu Image](image-url)
Submission Packages

What is a Submission Package?

- The electronic package created by the state to propose amendments to a Medicaid State Plan
- Includes necessary attachments and supporting information that is required for CMS approval
State SPA Workflow

1. Create package & complete all reviewable units (RUS)
2. Send package to State Point of Contact for review & edits
3. Review & edit package
4. Send package to State Director for review & certification
5. Review package
6. Certify & send package to State Point of Contact to submit to CMS
7. Submit package to CMS

CMS Review Begins
Step 1: Create State Profile

- State System Administrator (SSA) creates the State Profile
SSA selects **Create State Profile** in the **Actions** tab

- The State Profile must be established prior to submission package creation

The State Profile includes basic information such as:

- Addresses
- Medicaid Key Contacts
- CHIP and Medicare Information
- Public Notice Methods
Step 2: Create Submission Package

- State Editor creates the submission package and completes the Submission Forms and Reviewable Units (RUs)
Create Package

- SE creates a submission package from the Actions tab
Draft vs. Official Submissions

**Official Submissions**
Start the 90-day clock
- CMS may review and disposition
- CMS may implement RAI or Clarification
- State may allow CMS to view prior to submission

**Draft Submissions**
Does not start the 90-day clock
- CMS may review, but cannot disposition or submit Clarification/RAI
- CMS returns the submission to the state and provides feedback in the Correspondence Log
- If the state does not edit the returned Draft package, it may be closed and converted to Official for submission to CMS on the 90-day clock
- If the state does edit the returned Draft package, the state must re-submit the Draft to CMS off the 90-day clock
- State may allow CMS to view prior to submission
Reviewable Units

- Submission packages are composed of **Reviewable Units**, which are sections within the package that must each be validated and saved.
- In an Official package, all RUs must be completed to forward to SPOC.
- Every submission package begins with the Submission Forms, which are required components of every new submission package:
  - Summary
  - Medicaid State Plan
  - Public Comment
  - Tribal Input
  - Other Comment (Health Homes SPA only)
- Additional RUs will vary in name and amount based on program.
Validate & Navigate RUs

- Validate & Save: SE validates and saves RUs to ensure no errors are present.

- If no errors exist, the RU saves and SE can continue to other RUs.
Forward Package to SPOC

- SE forwards the package to State Point of Contact (SPOC) for review
Package Created: What’s Next?

- SPOC receives the task (via email and the Tasks tab) to review and edit the submission package.
State SPA Workflow (Steps 1-2): Knowledge Check Question

Which role is not matched with the correct action?

A. State Editor (SE): Creates package
B. State Editor (SE): Makes updates to the package
C. State System Administrator (SSA): Creates State Profile
D. State System Administrator (SSA): Forwards the package to the State Point of Contact
State SPA Workflow (Steps 1-2): Knowledge Check Answer

Answer:

D. SSA: Forwards the package to the SPOC

Once the SE has created the package, the SE forwards the package to the SPOC to review and edit.
Break!
Step 3: Review & Edit Package

- State Point of Contact (SPOC) opens the task to review and edit the package
Review & Edit Package

- The SPOC is routed to a screen that includes all RUs added to the package.
- They may review each RU or choose to move the package forward.

### Submission Form - Reviewable Units

<table>
<thead>
<tr>
<th>Reviewable Unit</th>
<th>Updated By</th>
<th>Updated Date</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submission - Summary</td>
<td>Training Sery</td>
<td>8/30/2018 10:38 AM EDT</td>
<td>✔️</td>
</tr>
<tr>
<td>Submission - Medicaid State Plan</td>
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### Medicaid Eligibility SPA - Reviewable Units

<table>
<thead>
<tr>
<th>Reviewable Unit</th>
<th>Proposed Effective Date</th>
<th>Updated By</th>
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<tr>
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</table>
Forward Package to the SDIR

- After completing the review, the SPOC will take action and send the package to the State Director for further review.
Package Reviewed: What’s Next?

- The package is sent to the State Director (SDIR) for review and certification
Step 4: Review & Certify Package

- SDIR opens the task to review and certify the package

![Review Submission Package](image)
Review Package

- SDIR is routed to a screen that includes all RUs added to the package.
- They may review each RU of choose to move the package forward.

### Submission Form - Reviewable Units

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Certify & Forward Package to SPOC

- After completing the review, SDIR will take action and send the package to the State Point of Contact (SPOC) who will submit the package to CMS.
Package Certified: What’s Next?

- The package is forwarded to the SPOC for submission to CMS
Step 5: Submit Package to CMS

- SPOC receives a task to review the package to submit to CMS

  ![Email Example]

  **AWS TRAIN <AWSTRAIN@macprotrn.cms.gov>**
  Today, 11:03 AM

  This message has been sent by Appian

  **Review Submission Package - NY2018MS0049O - (NY-18-4688-as3)**

  This task was assigned to you on Aug 30, 2018 11:01 AM EDT
  The task priority is Normal

  To view the task, please [follow this link](#)
Submit Package to CMS

- SPOC will take action to submit the package to CMS
Package Record

- State roles can view submission packages in the Records tab.

<table>
<thead>
<tr>
<th>News</th>
<th>Tasks (8)</th>
<th>Records</th>
<th>Reports</th>
<th>Actions</th>
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<tr>
<td></td>
<td></td>
<td>Submission Packages</td>
<td>View Submission Packages for other States</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Submission Packages</td>
<td>View all Submission Packages for your State</td>
<td></td>
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</table>
Package Submitted: What’s Next?

- The package is submitted to CMS, specifically the CMS Point of Contact (CPOC) to begin the review process.
State SPA Workflow (Steps 3-5): Knowledge Check Question

Which role is not matched with the correct action?

A. SPOC: Reviews and validates RUs
B. State Director: Sends package to CMS for approval
C. SPOC: Can return the package to the SE for revision
D. State Director: Certifies the package
State SPA Workflow (Steps 3-5): Knowledge Check Answer

Answer:

B. State Director: sends package to CMS for approval

After the SPOC forwards the package to the State Director to review and certify, the State Director sends the package back to the SPOC to send to CMS for approval.
Questions?
State SPA Workflow Review

1. Create package & complete all reviewable units (RUS)
2. Send package to State Point of Contact for review & edits
3. Review & edit package
4. Send package to State Director for review & certification
5. Review package
6. Certify & send package to State Point of Contact to submit to CMS
7. Submit package to CMS

CMS Review Begins
Roadmap to Clarification

- CMS may issue a request for Clarification on a submission package and enters question via the Correspondence Log
- SPOC receives an email notification of the Clarification request

From: MACPRO Notification Service <process72696@cms.gov>
Sent: Wednesday, June 6, 2018 4:14 PM
To: CMS MACPro
Subject: Clarification Requested by CMS (NE-18-0001-A) - NE2018MS00300

Training CPOCNE,
CMS Point of Contact (CPOC) has requested clarification for a package.

Package Information:

- **State:** Nebraska
- **Package ID:** NE2018MS00300
- **SPA ID:** NE-18-0001-A
- **Date:** 6/6/2018

Sincerely,
Training CPOCNE - macpro@cms.hhs.gov
Correspondence Log

- CMS will communicate with the State Point of Contact (SPOC) via the Correspondence Log
- The Correspondence Log is located under the package record
- A Correspondence Log can be created for an entire submission package or at an RU level
Additionally, when responding to entries in the Correspondence Log, the SPOC can create a thread.
Clarification Process

CMS requests Clarification, returning package to SPOC

SPOC: Go to Records tab to review Correspondence Log

Are package updates needed?

NO: SPOC: Respond to CMS in Correspondence Log thread

YES: SPOC: Respond to CMS in Correspondence Log thread

SPOC: Go to Tasks tab & take action to modify package

SPOC: Take action to submit package to CMS

SPOC: Refresh Tasks tab to review & edit

CMS Review Begins
Clarification

What happens next:

- After a response is submitted, the submission package will return to CMS for continued review
- CMS will receive a notification that the submission package has been sent back
Roadmap to RAI

- CMS may issue a Request for Additional Information (RAI) on a submission package
- SPOC receives an email notification of the RAI

From: AWS TRAIN <AWSTRAIN@macprotrn.cms.gov>
Sent: Thursday, April 19, 2018 12:18 PM
Subject: New Task: Respond to RAI - NE2018MS0022O - (NE-18-0001-TEST)

Respond to RAI - NE2018MS0022O - (NE-18-0001-TEST)

This task was assigned to you on Apr 19, 2018 12:18 PM EDT
The task priority is Normal

To view the task, please follow this link

This message has been sent by Appian
RAI Process

CMS initiates RAI, returning package to SPOC

State Point of Contact (SPOC)

90-day clock stops

CMS

SPOC

Go to Tasks tab to view RAI

Are package updates needed?

YES

NO

SPOC

Respond to RAI questions & return to package summary

Take action to submit RAI response & package to CMS

New 90-day clock starts

SPOC

Take action to modify package

Refresh Tasks tab to review & edit package

CMS Review Begins
What happens next:

- Once the RAI response is submitted to CMS, CMS will receive a notification to review the package again
- CMS will re-review the submission package
Additional Resources & Help Desk
Additional Resources

Resources for obtaining access can be found on Medicaid.gov at the links below:

- **EIDM Instructions for MACPro Users**
  - Provides users with detailed steps on registering an EIDM ID and requesting MACPro access in EIDM

- **Introductory Reference Document for Roles and Administration**
  - Provides users with detailed descriptions on available MACPro roles, the steps to request a role, and additional user management functionalities

- **MACPro Medicaid State Plan Reference Document for State Users**
  - Provides users with detailed steps users will follow to create, review, and submit a SPA submission package in MACPro, as well as additional actions state users can take
How to Contact the Help Desk

For issues related to MACPro access and how to use the MACPro system, contact the MACPro Help Desk:

- Email: MACPro_HelpDesk@cms.hhs.gov
- Phone: 301-547-4688
- Hours: 9:00 AM – 7:00 PM EST
Contacting the Help Desk

Info to include in email requests:

- User contact information (Name, phone number, organization/state, email address, User ID)
- Component (Medicaid State Plan)
- Authority (Eligibility/Administration)
- Detailed description of your inquiry
- Last screen/tab/navigation activity before problem
- Screenshots
Web Browsers

Optimal Web Browsers

**Google Chrome** is optimal and recommended; updates automatically; most recent version supported

**Mozilla Firefox** updates automatically; most recent version supported

**Internet Explorer Version 11** required; using older version will prevent login

**Windows 10** software is compatible with MACPro

**OS X Yosemite** software is compatible with MACPro
Next Steps
Next Steps: Obtain MACPro Access

- Obtain an EIDM ID and request your appropriate EIDM Role for access to MACPro, if you do not already have one **at this time**.
- Once approved in EIDM, log in to MACPro to request MACPro specific roles.
Questions?
This video recording can be found in 4 parts on Medicaid.gov (Part 1, Part 2, Part 3 and Part 4).

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<th>Video Timestamp</th>
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<tr>
<td>State User Roles</td>
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<td>Part 2: 0:00-7:48</td>
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<tr>
<td>State SPA Workflow</td>
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<td>Part 2: 7:49-16:10</td>
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<td>SSA, Step 1: Create State Profile</td>
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<td>Part 2: 16:11-18:03</td>
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<td>Part 3: 10:10-12:49</td>
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<td>SDIR, Step 4: Review &amp; Certify a Package</td>
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<td>Part 3: 12:50-14:50</td>
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<td>Additional Resources, Help Desk, and Next Steps</td>
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<td>Part 4: 10:17-15:45</td>
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