



Medicaid and CHIP Program System (MACPro)

MACPro

Medicaid & CHIP Program System

Medicaid State Plan Amendment (SPA) State Introductory Training

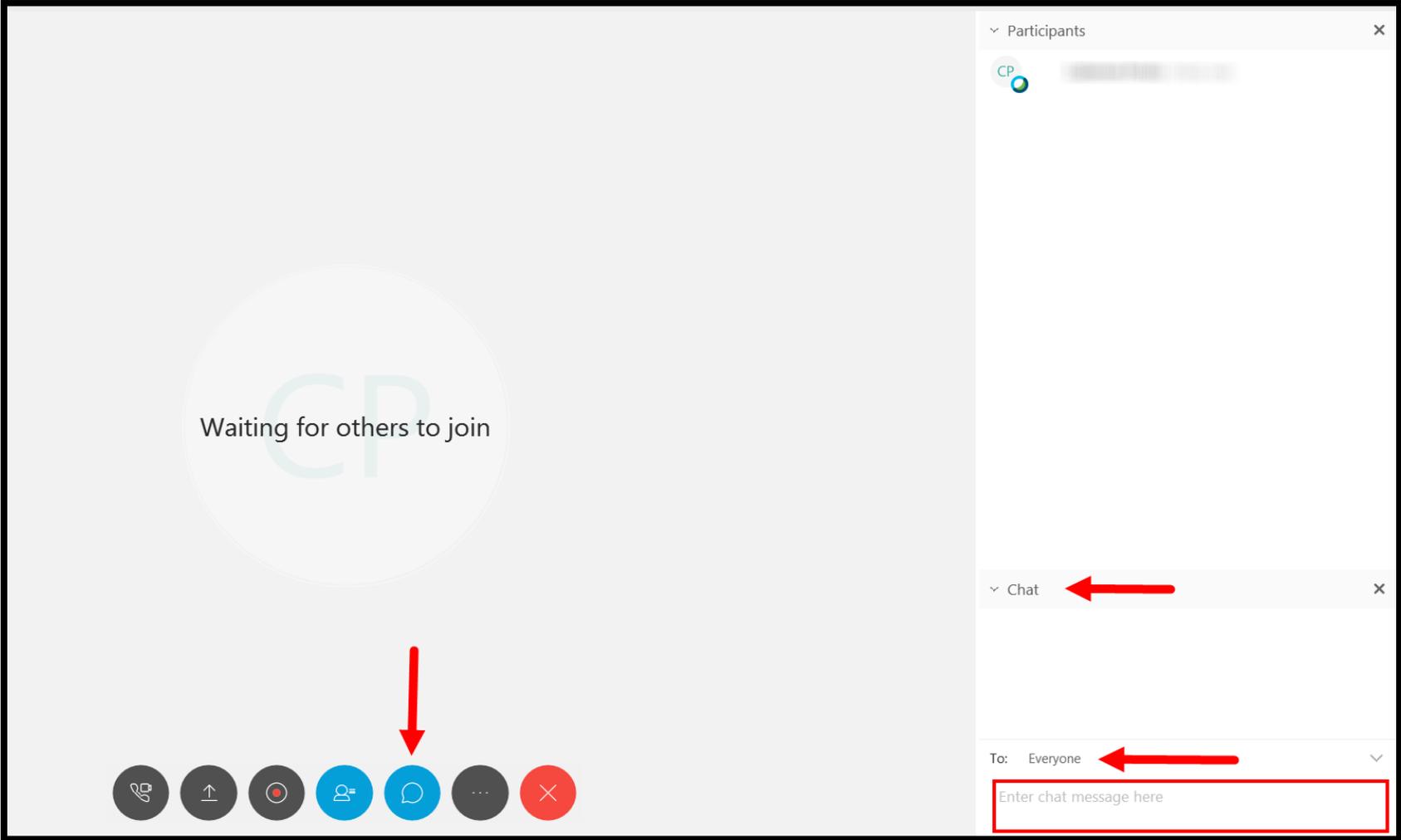
Session 1: Thursday, November 8th, 2018

Session 2: Wednesday, November 14th, 2018

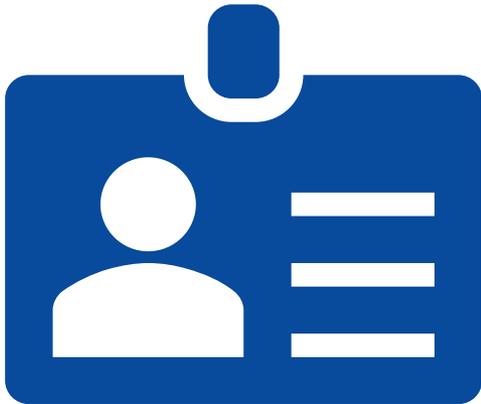
Welcome!

- 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

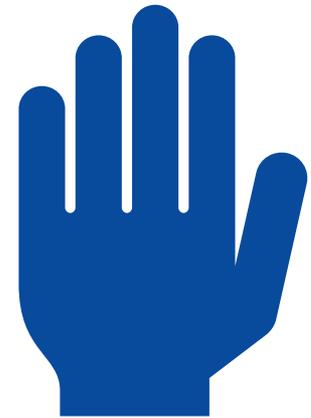
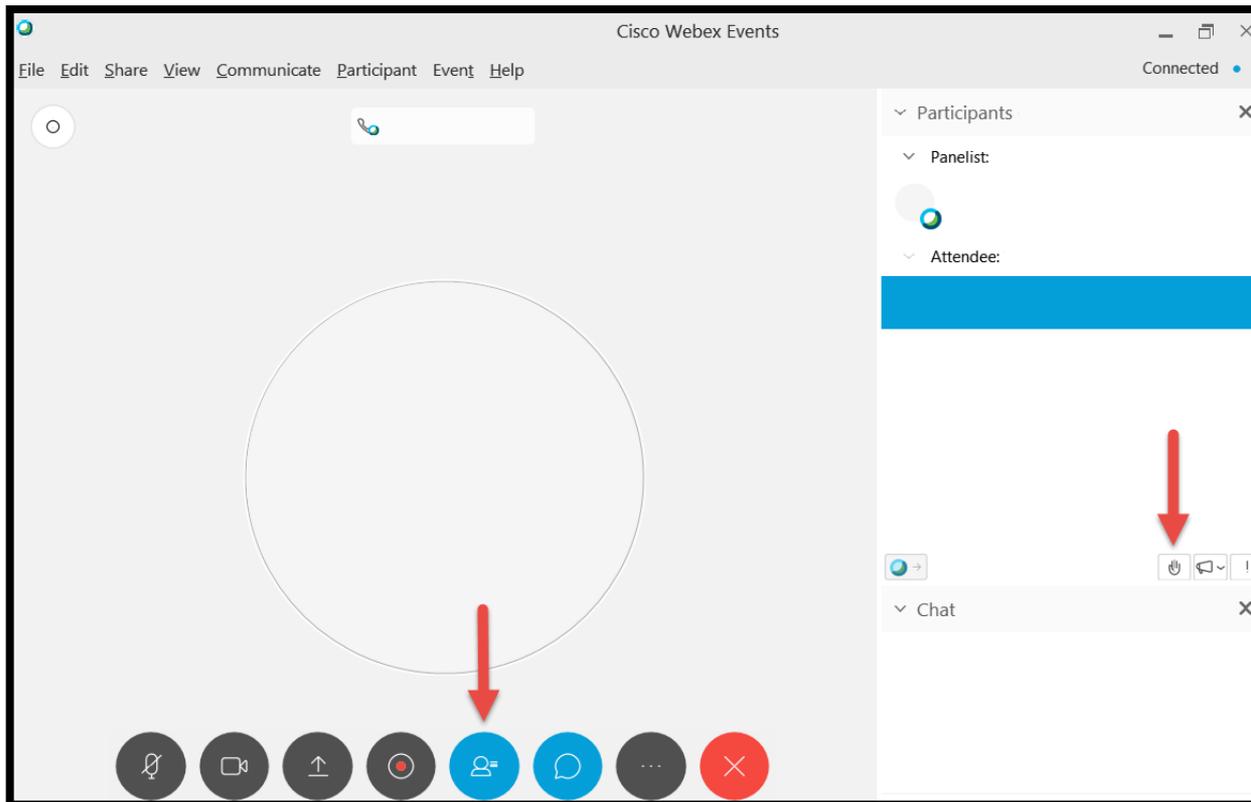


Today's Training

- 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](https://www.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.



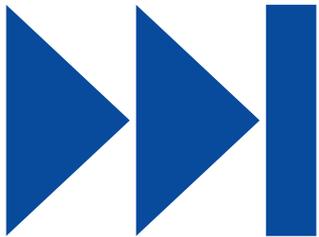
MACPro Functionality



Current MACPro Functionality

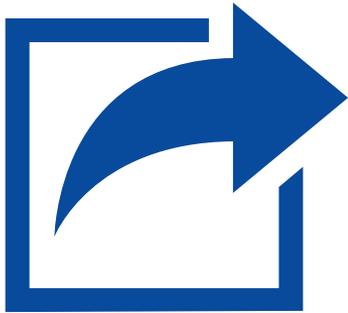
- Medicaid State Plan Amendments
 - Health Homes
 - Eligibility
 - Administration (Single State Agency)
- Quality Measure Reporting

Future of MACPro



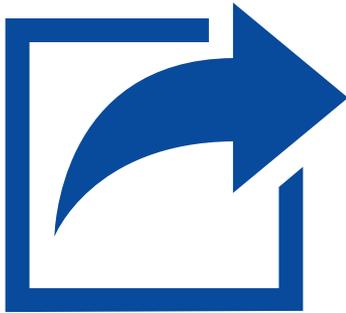
- Adult and Child Core Quality Measures Reporting
- Additional Medicaid State Plan Amendments (SPA)
- Managed Care Contracts (MCC)
- CHIP Program and SPAs
- Waivers and 1115 Demonstrations
- Advanced Planning Documents (APD)

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

Transition of SPAs to MACPro (cont.)



- 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

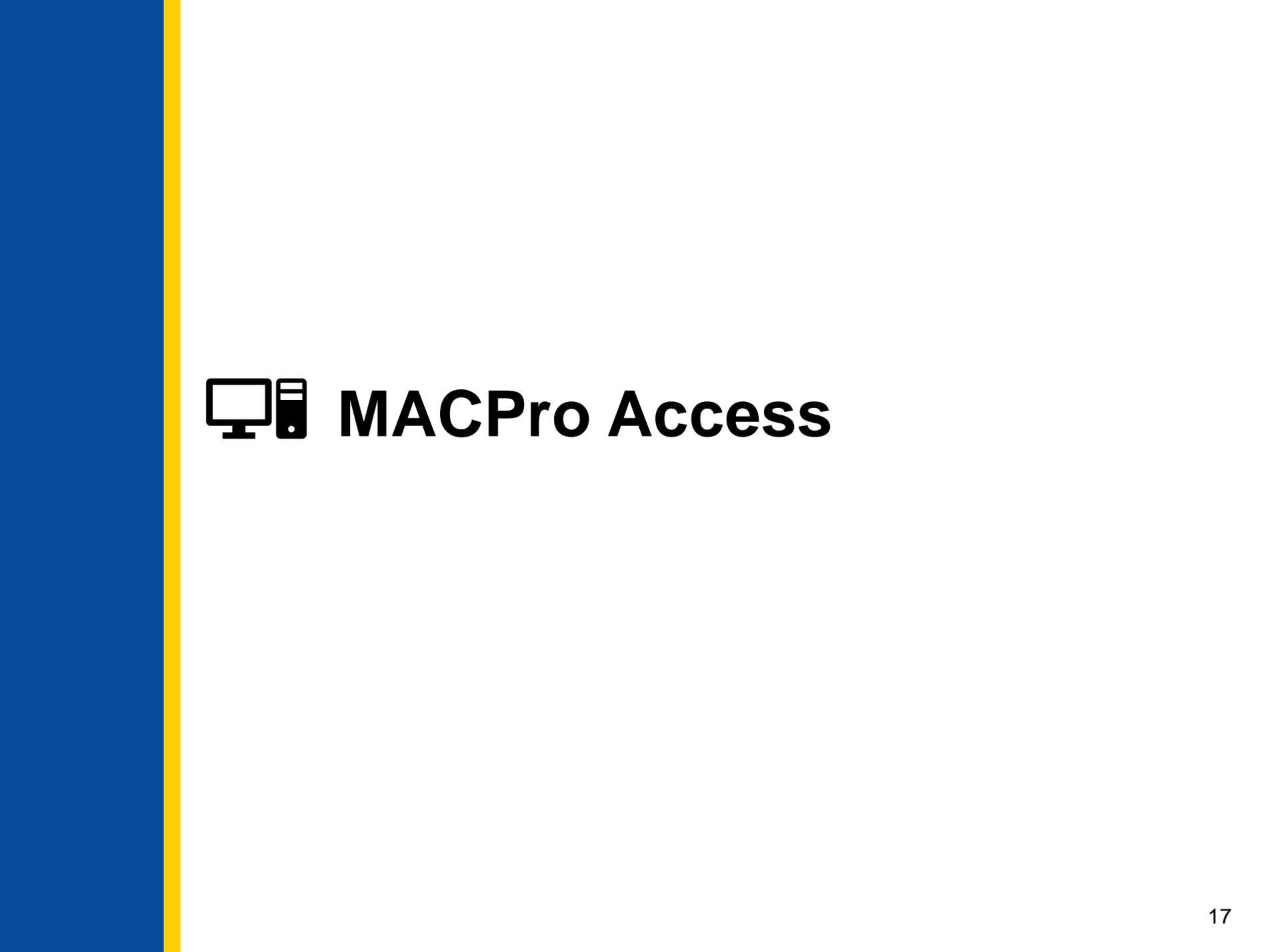
Benefits of MACPro



- Ensure data consistency
- Improves efficiency
- Increases transparency
- Establishes clear communication processes
- Enables data-driven decision making
- Centralizes multiple systems

Questions?





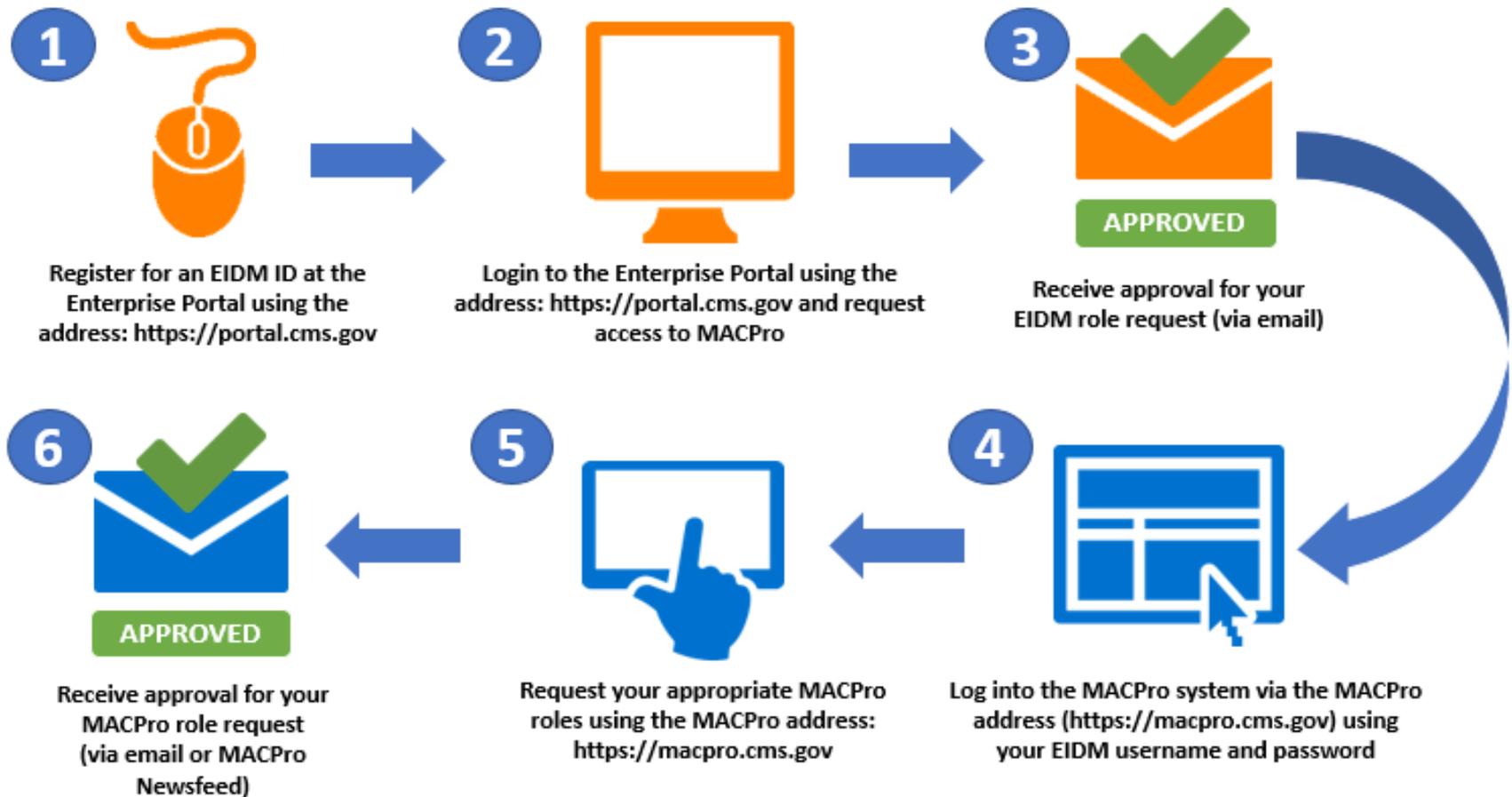
MACPro Access

MACPro Access: What Will I Learn?

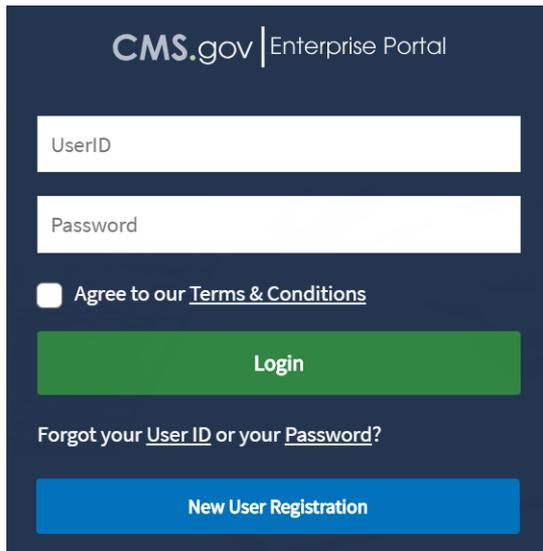


- How to obtain access to MACPro
- When each step of the process should be completed

MACPro Access Steps



Enterprise Identity Management (EIDM)



The image shows a screenshot of the CMS.gov Enterprise Portal login interface. At the top left, it says "CMS.gov | Enterprise Portal". Below this are two input fields: "UserID" and "Password". Under the password field is a checkbox labeled "Agree to our Terms & Conditions". A green "Login" button is positioned below the checkbox. At the bottom of the login area, there is a link that says "Forgot your User ID or your Password?". Below the login area is a blue button labeled "New User Registration".

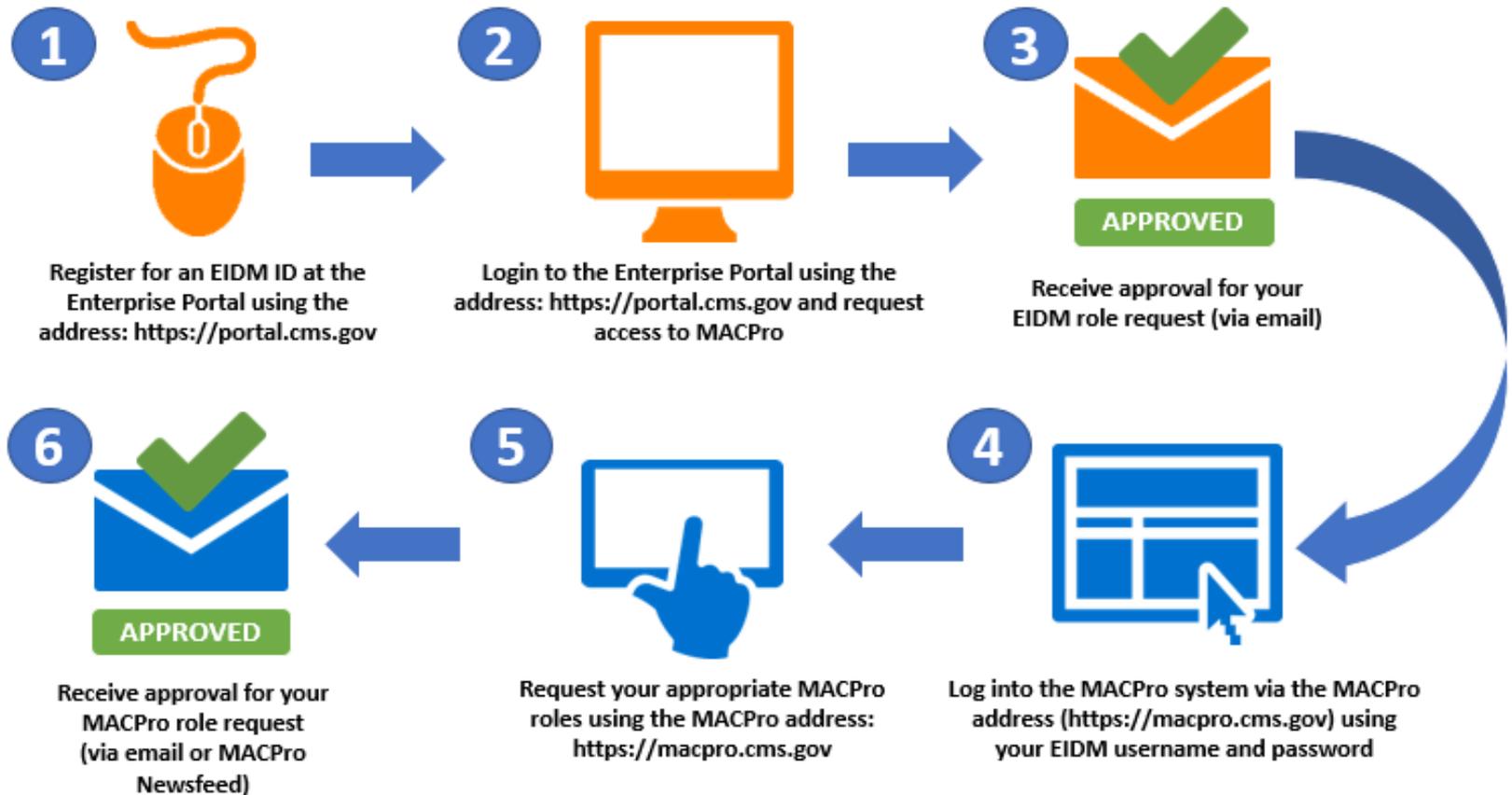
- **Enterprise Identity Management (EIDM)**
 - An identity management and services system providing access to CMS applications
- Users have one EIDM ID for identity proofing across multiple applications
- EIDM CMS Enterprise Portal address (<https://portal.cms.gov>)
- All State users request “**MACPro 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

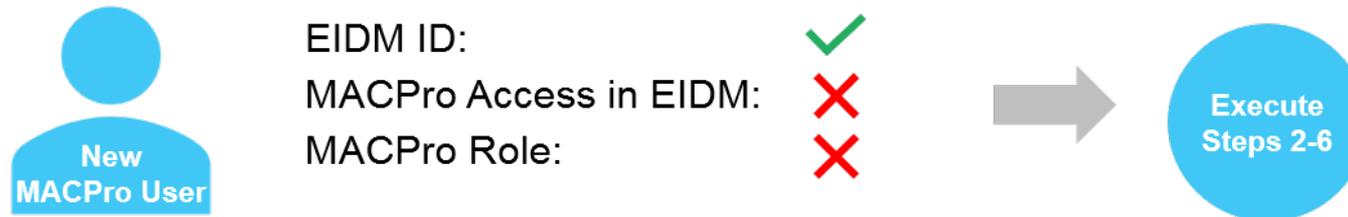


MACPro Access Scenarios

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



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



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



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 Point of Contact**



- **State Director**



- ***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

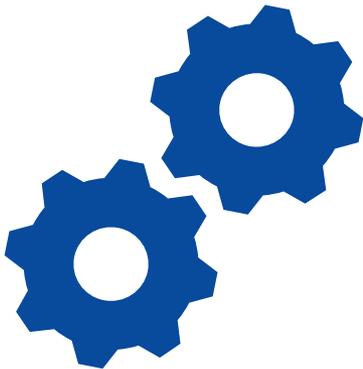
- MACPro version of state plan templates

Dependencies

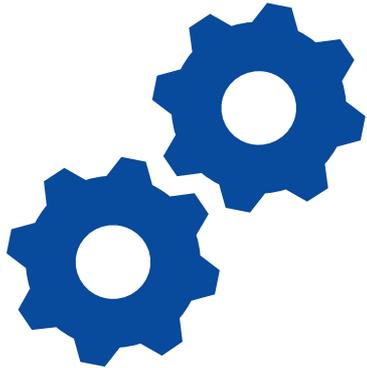
- If RUs are dependent, a change in one RU will result in a change in another RU
- These are described as primary and secondary RUs

Correspondence Log

- Tool for communication between the State Point of Contact (SPOC) and CMS Point of Contact (CPOC)



State User Functionalities cont.



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 Toolbar & Package Navigation Menu

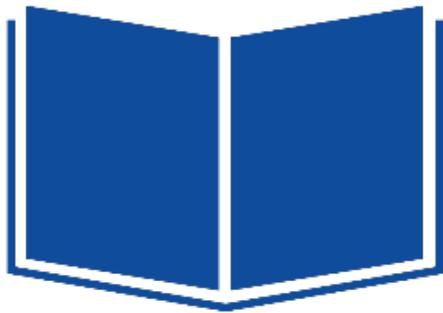
- **Upper Tool Bar:** News, Tasks, Records, Reports, and Actions



- **Package Navigation Menu:**



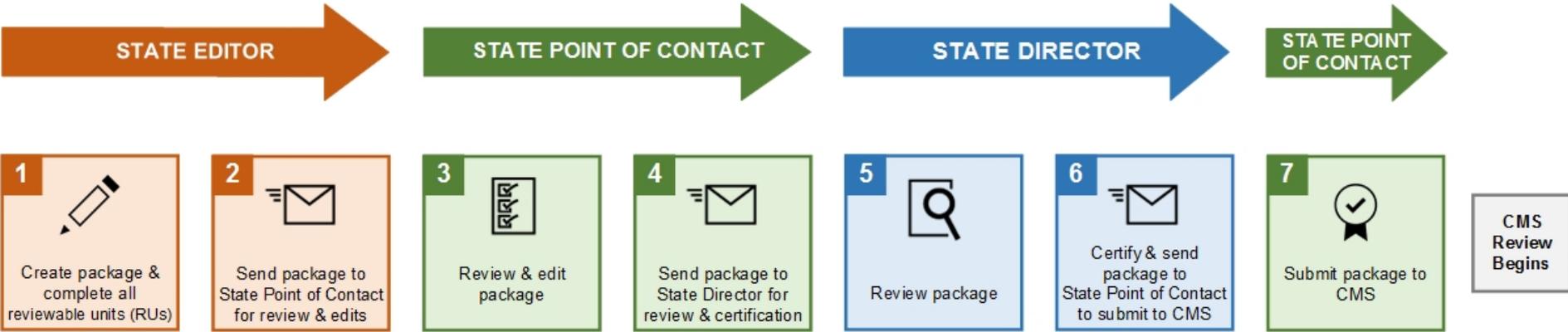
Submission Packages



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



Step 1: Create State Profile



- State System Administrator (SSA) creates the State Profile



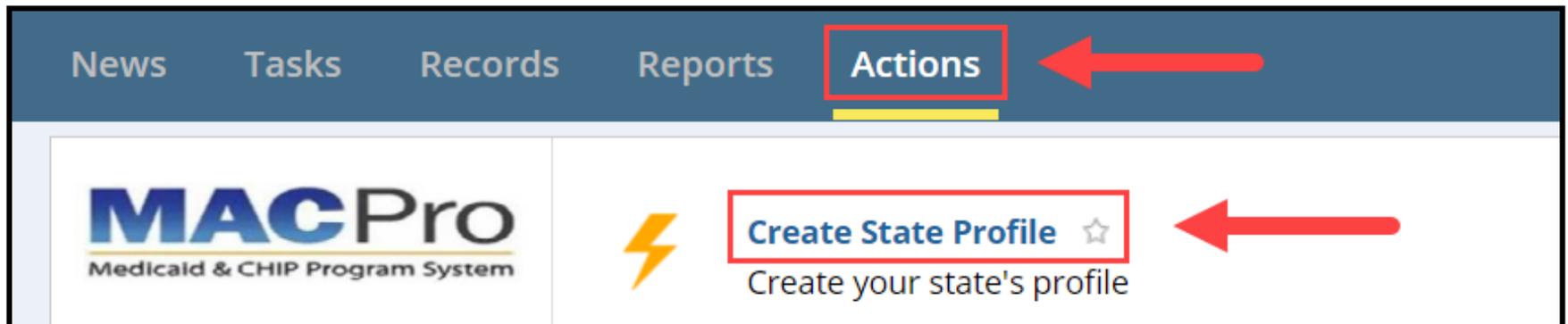
Create State Profile

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

A screenshot of a software interface's navigation menu. The menu is a dark blue horizontal bar with several tabs: "News", "Tasks (1)", "Records", "Reports", and "Actions". The "Actions" tab is highlighted with a red box and a red arrow pointing to it from the right. Below the menu, there is a list of actions. The first action is "Create a new Medicaid and CHIP Child Quality Measure Report" with a yellow lightning bolt icon. The second action is "Create Submission Package" with a grey star icon and a red box around it, with a red arrow pointing to it from the right. Below this is the text "Create a new Submission Package".

News	Tasks (1)	Records	Reports	Actions
Medicaid State Plan (1)				Create a new Medicaid and CHIP Child Quality Measure Report
Quality Measure (5)				Create Submission Package ☆
System Help (1)				Create a new Submission Package



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

Submission Type

Official Submission Package ←

Draft Submission Package

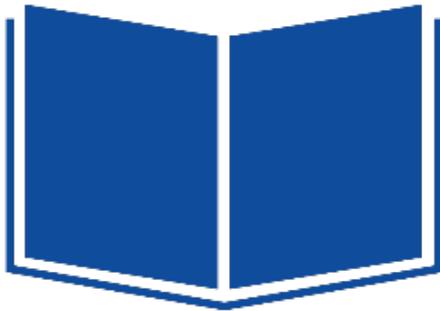
Draft Submissions

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

Validation & Navigation

Would you like to validate the reviewable unit data?

Yes No

Note: If validation fails, errors will appear in red above.

SAVE REVIEWABLE UNIT **GO TO SELECTED REVIEWABLE UNIT**

Navigate to Reviewable Unit

Submission - Medicaid State Plan

Progress Complete

Persons are required to respond to a collection of information unless it displays a valid... is 0938-1188. The time required to complete this information collection is estimated... existing data resources, gather the data needed, and complete and review the... estimate(s) or suggestions for improving this form, please write to: CMS, 7500 Security... land 21244-1850.

SAVE REVIEWABLE UNIT **GO TO SELECTED REVIEWABLE UNIT**

- 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

News Tasks (1) **Records** Reports Actions

Records / Submission Packages

NY - Submission Package - NY2018MS00490 - (NY-18-4688-as3) - Eligibility

Summary Reviewable Units News **Related Actions**

Forward Package to State POC for Review
Forward a submission package to the State POC for review

Modify Package

Choose Action

Available Workflow Actions *

Forward Submission Package to State Point of Contact (SPOC)

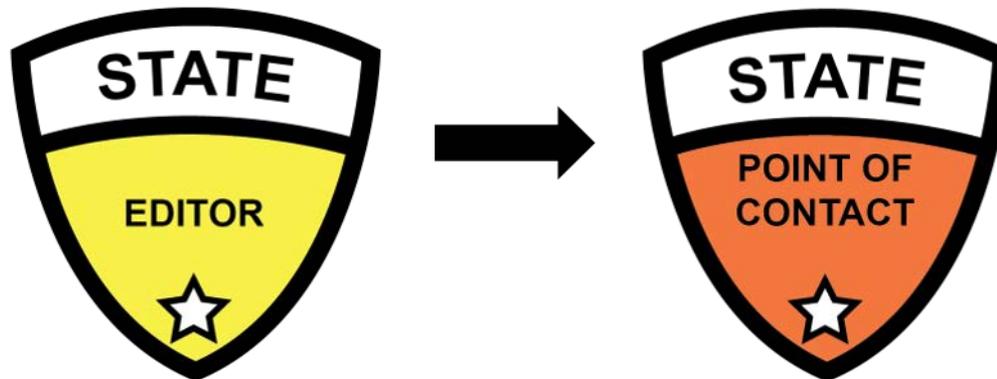
Instructions

CANCEL EXECUTE ACTION



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

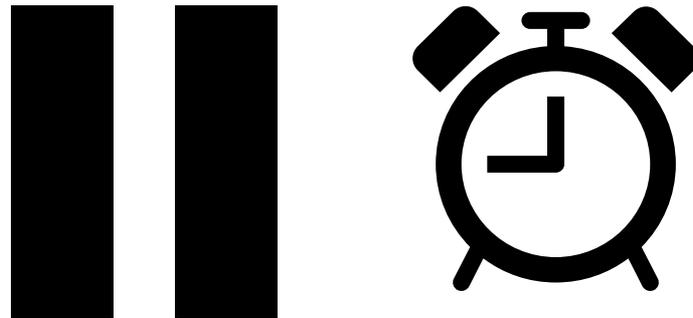
State SPA Workflow (Steps 1-2): Knowledge Check Answer

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

The screenshot shows an email notification from AWS TRAIN. The sender is identified as "AT" with the email address <AWSTRAIN@macprotrn.cms.gov>, and the time is "Today, 11:03 AM". The message content includes a header "Review Submission Package - NY2018MS00490 - (NY-18-4688-as3)" and a body text stating "This task was assigned to you on Aug 30, 2018 11:01 AM EDT. The task priority is Normal". At the bottom, it says "To view the task, please [follow this link](#)", with a red arrow pointing to the link. A separate box at the bottom of the screenshot shows a checkmark icon, "Me", the same task title, and "A moment ago" with a star icon.



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

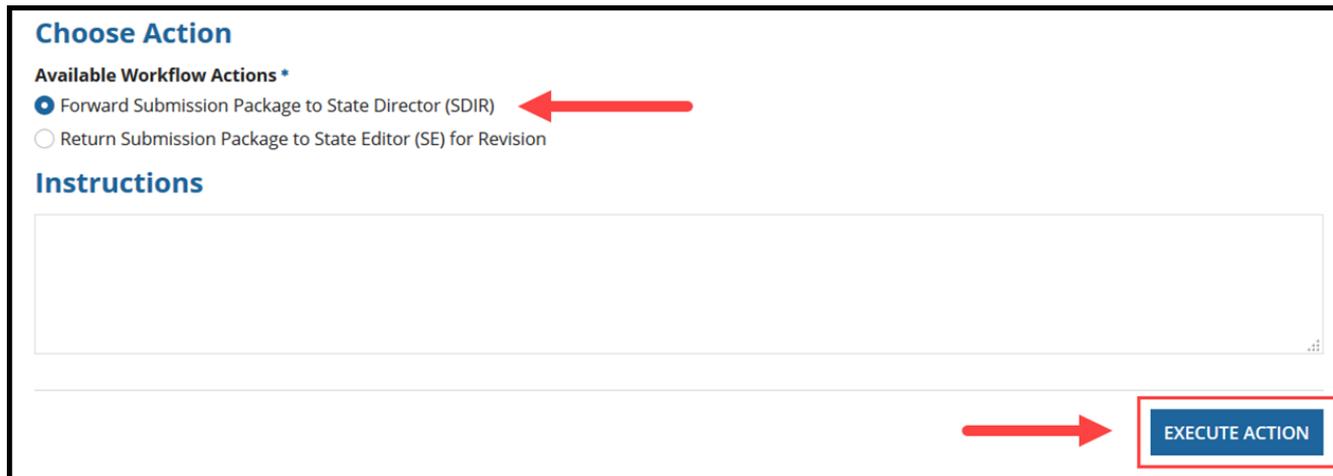
Submission Form - Reviewable Units					
Reviewable Unit		Updated By	Updated Date		Status
Submission - Summary		Training Seny	8/30/2018 10:38 AM EDT		✓
Submission - Medicaid State Plan		Training Seny	8/30/2018 10:23 AM EDT		✓
Submission - Public Comment		Training Seny	8/30/2018 10:33 AM EDT		✓
Submission - Tribal Input		Training Seny	8/30/2018 10:34 AM EDT		✓

Medicaid Eligibility SPA - Reviewable Units					
Reviewable Unit	Proposed Effective Date	Updated By	Updated Date	Other Approved Version	Status
Mandatory Eligibility Groups	8/31/2018	Training Seny	8/30/2018 10:35 AM EDT	<input type="radio"/>	✓
Optional Eligibility Groups	8/31/2018	Training Seny	8/30/2018 10:35 AM EDT	<input type="radio"/>	✓



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



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

This message has been sent by Appian

Review Submission Package - NY2018MS00490 - (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](#) 

 → Me
Review Submission Package - NY2018MS00490 - (NY-18-4688-as3)
A moment ago ☆



Review Package

- SDIR 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					
Reviewable Unit		Updated By	Updated Date		Status
Submission - Summary		Training Seny	8/30/2018 10:38 AM EDT		✓
Submission - Medicaid State Plan		Training Seny	8/30/2018 10:23 AM EDT		✓
Submission - Public Comment		Training Seny	8/30/2018 10:33 AM EDT		✓
Submission - Tribal Input		Training Seny	8/30/2018 10:34 AM EDT		✓

Medicaid Eligibility SPA - Reviewable Units					
Reviewable Unit	Proposed Effective Date	Updated By	Updated Date	Other Approved Version	Status
Mandatory Eligibility Groups	8/31/2018	Training Seny	8/30/2018 10:35 AM EDT	<input type="radio"/>	✓
Optional Eligibility Groups	8/31/2018	Training Seny	8/30/2018 10:35 AM EDT	<input type="radio"/>	✓



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



Choose Action

Available Workflow Actions *

- Certify and Forward Submission Package to State Point of Contact (SPOC) for Submission to CMS ←
- Return Submission Package to State Point of Contact (SPOC) for Revision

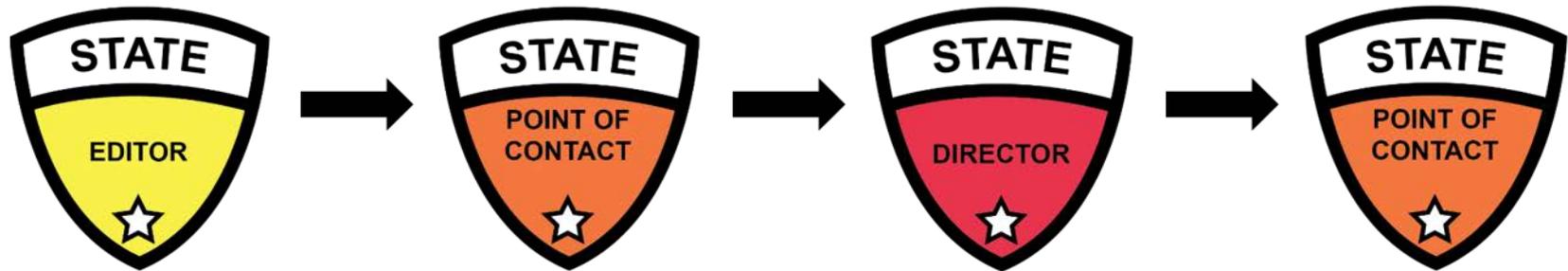
Instructions

→ EXECUTE ACTION



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



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

This message has been sent by Applan

Review Submission Package - NY2018MS00490 - (NY-18-4688-as3)

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

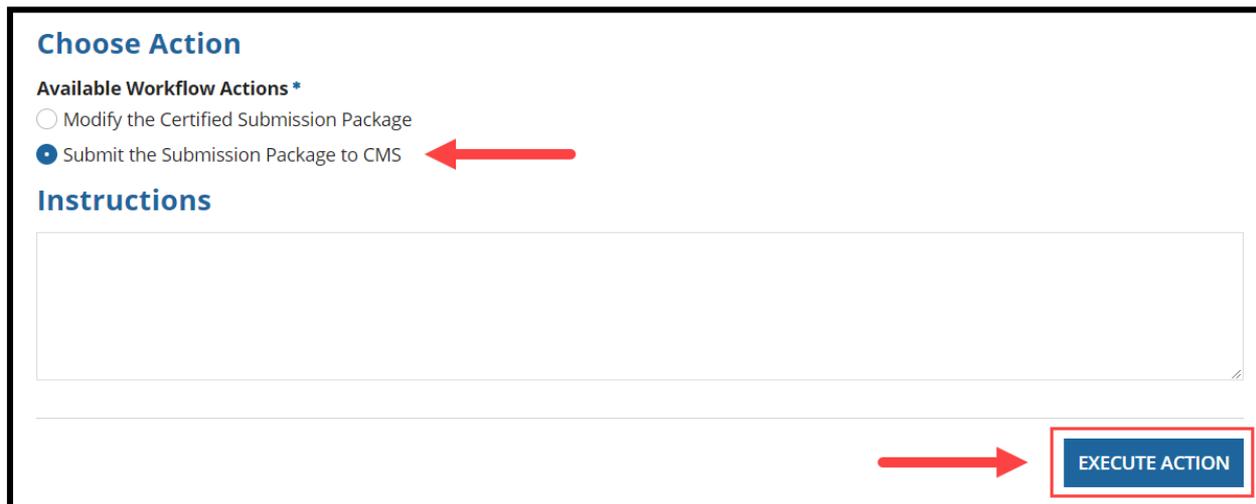
To view the task, please [follow this link](#) ←

 → Me
Review Submission Package - NY2018MS00490 - (NY-18-4688-as3)
2 minutes ago ☆



Submit Package to CMS

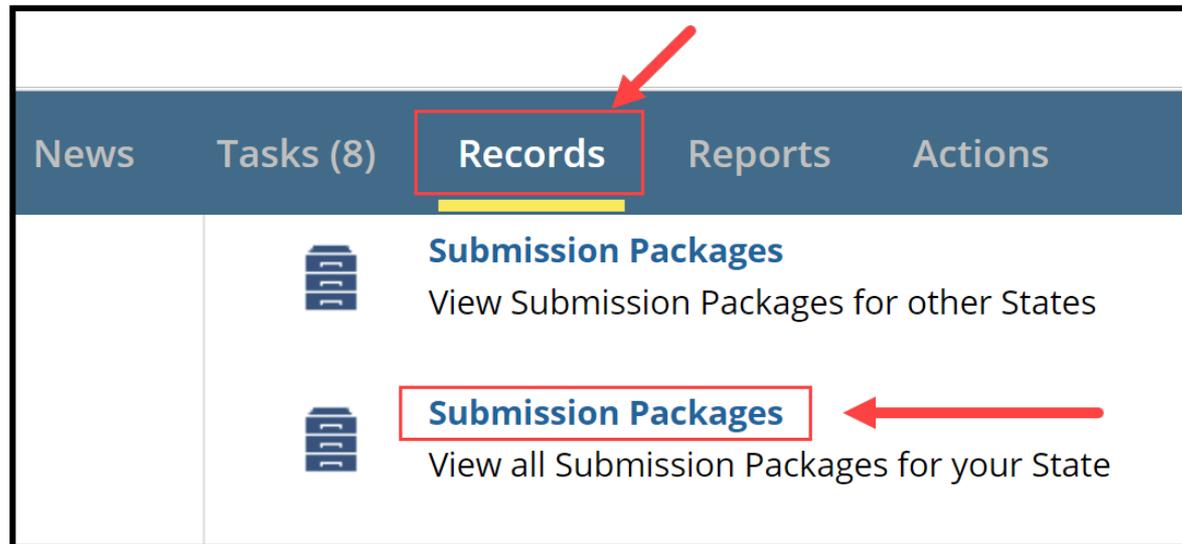
- SPOC will take action to submit the package to CMS





Package Record

- State roles can view submission packages in the Records tab





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



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

The screenshot shows a web application interface for creating a correspondence log. The page title is 'NY - Submission Package - NY2018MS0046D - Eligibility'. The breadcrumb trail is 'Records / Submission Packages'. The main heading is 'Create/Add Correspondence Log'. Below the heading, there is a form with the following fields and elements:

- Reference Subject:** A text input field with a red arrow pointing to it.
- Reviewable Unit:** A dropdown menu with a red arrow pointing to it. Below it, a note says 'Please select a reviewable unit here. If reviewable unit is not selected, this entry will be treated as package level correspondence.'
- Correspondence Detail:** A large text area with a red arrow pointing to it. Below it, a character count shows 'Character count: 12/4000'.
- Correspondence Document:** A file upload area with a red arrow pointing to it. It includes an 'UPLOAD' button and a 'Drop file here' instruction.
- Buttons:** A 'Request System Help' link, a 'Collapse' button, and a 'CREATE CORRESPONDENCE LOG' button (highlighted with a red box and a red arrow).



Correspondence Log (cont.)

- Additionally, when responding to entries in the Correspondence Log, the SPOC can create a thread

The screenshot displays the 'Correspondence Log Summary' page for 'NY - Submission Package - NY2018MS0046D - Eligibility'. The page includes a search bar and a table of correspondence entries. A red arrow points from the 'Test 2' entry in the table to a 'Respond' button in a modal window. The modal window shows details for the selected entry, including the user, group, division, date and time, and a text input field for the response.

Name	Group	Division	POC E-mail	Reviewable Unit	Reference Subject
Training Cpoony (TRAININGCPOCNY)			macpro@cms.hhs.gov		Test 2
Training Cpoony (TRAININGCPOCNY)			macpro@cms.hhs.gov	Submission - Tribal Input	Test

Reference Subject : Test 2

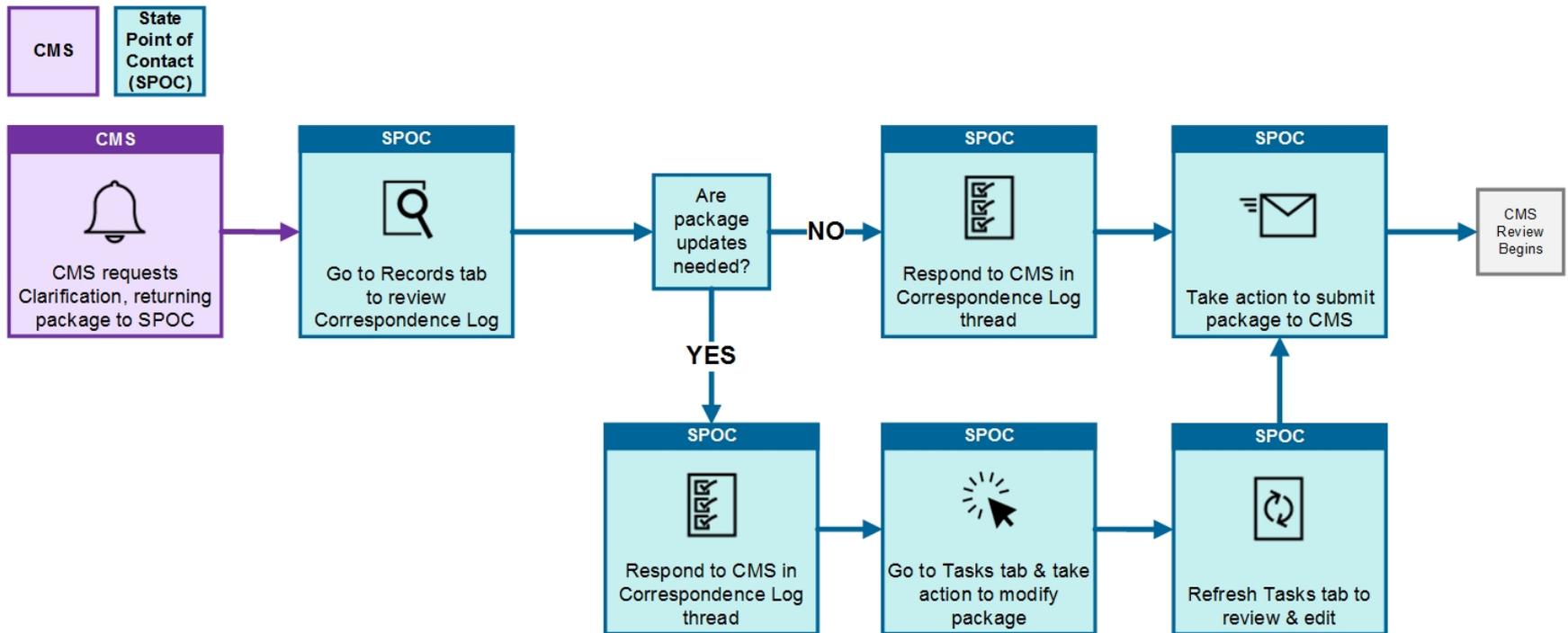
User : Training Cpoony (TRAININGCPOCNY)
Group :
Division :
Date and Time : 8/28/2018 3:21 PM EDT
Email : macpro@cms.hhs.gov

Correspondence Detail
text entered here

Respond

CLOSE

Clarification Process



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@macrotrn.cms.gov>
Sent: Thursday, April 19, 2018 12:18 PM
Subject: New Task: Respond to RAI - NE2018MS00220 - (NE-18-0001-TEST)

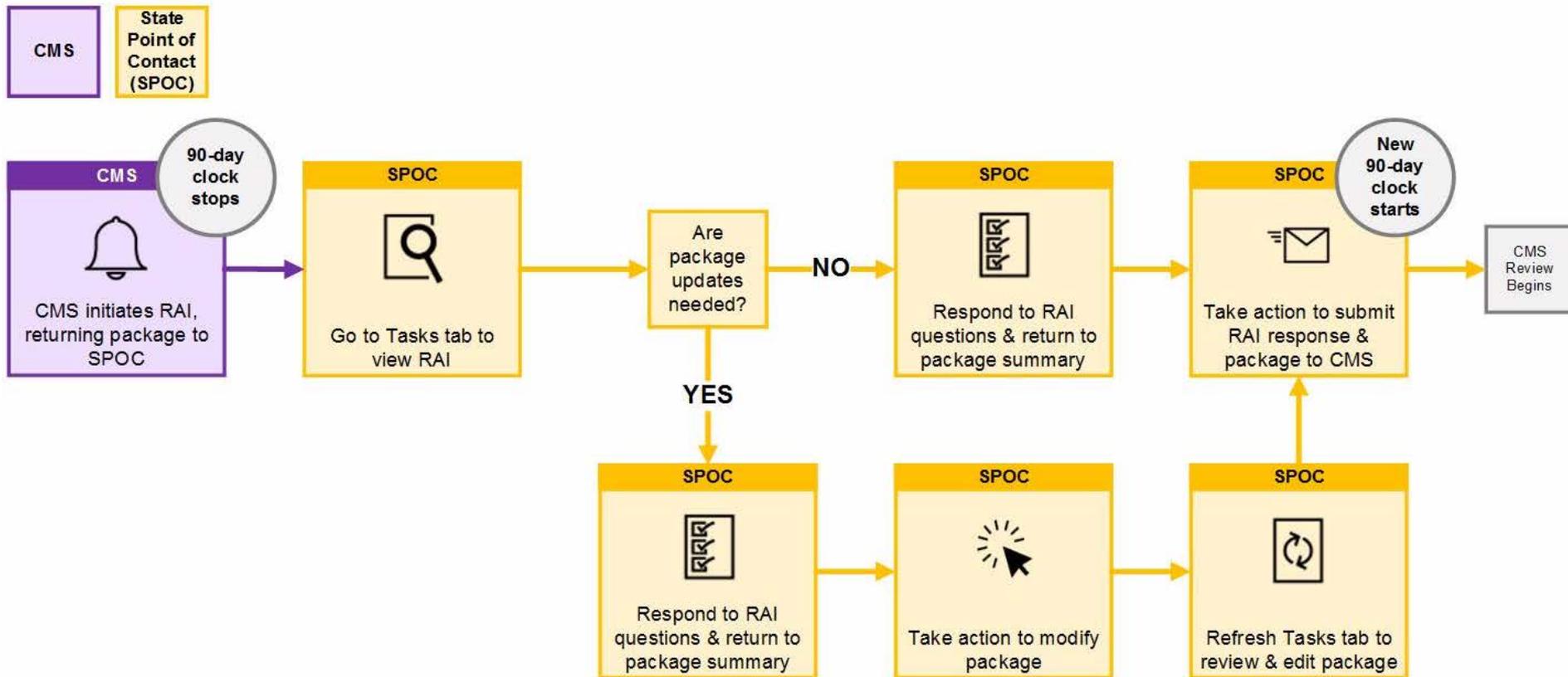
Respond to RAI - NE2018MS00220 - (NE-18-0001-TEST)

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



RAI



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

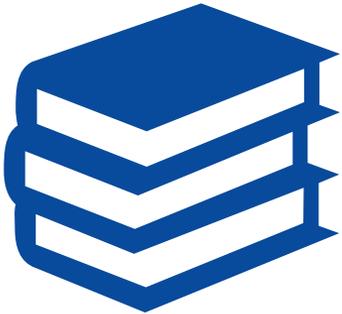


Additional Resources & Help Desk

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



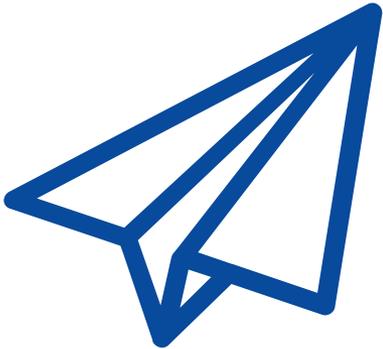
For issues related to MACPro **access** and how to **use** the MACPro system, contact the MACPro Help Desk:

- 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



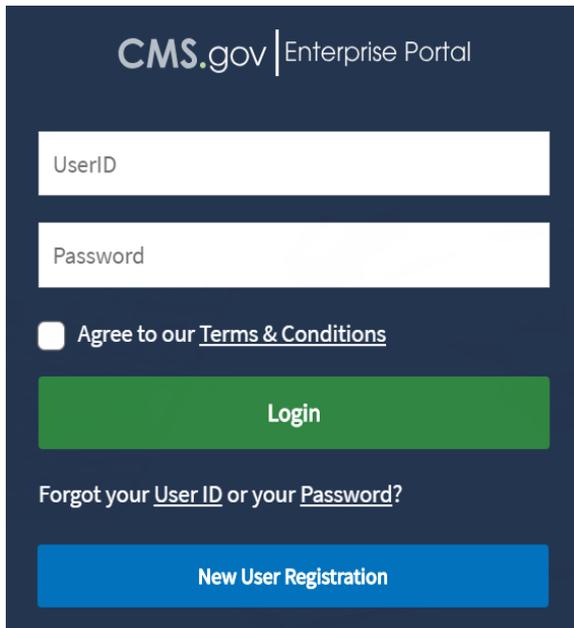
Windows 10 software is compatible with MACPro



OS X Yosemite software is compatible with MACPro

 **Next Steps**

Next Steps: Obtain MACPro Access



The screenshot shows the CMS.gov Enterprise Portal login interface. At the top left, it says "CMS.gov | Enterprise Portal". Below this are two input fields: "UserID" and "Password". Under the password field is a checkbox labeled "Agree to our [Terms & Conditions](#)". A green "Login" button is positioned below the checkbox. Below the login button is a link that says "Forgot your [User ID](#) or your [Password](#)?". At the bottom of the form is a blue "New User Registration" button.



- 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?



Video Recording Timestamp Reference

This video recording can be found in 4 parts on [Medicaid.gov](https://www.Medicaid.gov) ([Part 1](#) , [Part 2](#), [Part 3](#) and [Part 4](#)).

Topic	Slides	Video Timestamp
Introduction	1-16	Part 1: 0:00-13:47
MACPro Access	17-25	Part 1: 13:48-21:51
State User Roles	26-33	Part 2: 0:00-7:48
State SPA Workflow	34-40	Part 2: 7:49-16:10
SSA, Step 1: Create State Profile	41-42	Part 2: 16:11- 18:03
SE, Step 2: Create a Submission Package	43-52	Part 3: 0:00-10:09
SPOC, Step 3: Review & Edit a Package	53-56	Part 3: 10:10-12:49
SDIR, Step 4: Review & Certify a Package	57-60	Part 3: 12:50-14:50
SPOC, Step 5: Submit Package to CMS	61-68	Part 3: 14:51-18:34
Clarification & RAI	69-76	Part 4: 0:00-10:16
Additional Resources, Help Desk, and Next Steps	77-84	Part 4: 10:17-15:45