Medicaid and CHIP Program (MACPro) System

User Management Overview & In-System Demonstration

March 15, 2018
Agenda

- Updates to MACPro User Management Functionality
- Impacted MACPro Administrative Roles
- Additional Resources
- Help Desk/Technical Assistance
- Final Questions
- In-System Demonstration
Questions?

Webex meeting panel
Agenda

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- Updates to MACPro User Management Functionality
  - Applicable MACPro Administrative Roles
  - Additional Resources
- Help Desk/Technical Assistance
- Final Questions
- In-System Demonstration
Updates to MACPro
User Management Functionality

Poll:
Have you ever used the User Management functionality in MACPro?

YES = Green Check
NO = Red X
Updates to MACPro
User Management Functionality

Poll:
Have you ever requested a role in MACPro?

YES = Green Check
NO = Red X
Updates to MACPro
User Management Functionality

Poll:
Have you ever approved or denied a role in MACPro?

YES = Green Check
NO = Red X
Updates to MACPro
User Management Functionality

◊ Requesting Roles Based on Attributes
  ♦ When requesting/modifying a role, all users may select multiple authorities and/or states

◊ Role Removal
  ♦ All users may submit a role removal request for any currently assigned roles
  ♦ Administrators (SSA, CSA, CRA, CO Admin) may approve or deny role removal requests submitted by users
# Updates to MACPro User Management Functionality

<table>
<thead>
<tr>
<th>Functionality</th>
<th>Applicable Roles</th>
<th>* NEW*</th>
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<tbody>
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<td>Requesting to add, modify, or remove a role</td>
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Updates to MACPro
User Management Functionality

◊ Task Reassignment
  ♦ Specific users can reassign their own tasks
  ♦ Tasks may be manually reassigned from one MACPro user to another eligible user
    ◇ E.g. Senior Reviewers with matching component, region, and office type attributes can reassign tasks for certain users
  ♦ Tasks may be removed from a user's task queue when there are no eligible users available for reassignment
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Updates to MACPro
User Management Functionality

Routing CPOC Tasks

- A CPOC task will be routed to a CPOC with attributes (state and authority) matching that of the package.
- CPOCs can have a read-only view of the package even after they drop their “Authority” attribute matching the package.
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- Updates to MACPro User Management Functionality

- Applicable MACPro Administrative Roles

- Additional Resources

- Help Desk/Technical Assistance

- Final Questions

- In-System Demonstration
Applicable MACPro Administration User Roles

- State System Administrator (SSA)
- CMS Central Office Administrator (CMS CO Admin)
- CMS Role Approver (CRA)
- CMS System Administrator (CSA)
- CMS Senior Reviewer
<table>
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<tr>
<th>Role</th>
<th>Actions</th>
<th>Role Approver</th>
</tr>
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</table>
| **State System Administrator (SSA)** | • Reviews and dispositions state user role requests  
• Creates and maintains the State Profile  
• Views state system reports  
• Reassigns state specific tasks on behalf of users  
• Reviews and dispositions state role removal requests | • CMS System Administrator (CSA)                           |
# Applicable MACPro CMS Administration User Roles

<table>
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<th>Details</th>
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| CMS System Administrator (CSA)            | • Reviews and approves/denies user role requests  
• *Reassigns tasks on behalf of Package Approver/Disapprover, Disapproval Coordinator, Senior Reviewer, and CMS CO Admin*  
• Reviews and dispositions role removal requests  
• Runs system reports as needed                  | • Cannot request any other user role                                                              |
| CMS Role Approver (CRA)                   | • Reviews and approves/denies CPOC and SRT user role requests  
• *Reassigns tasks for the CPOC role*  
• Reviews and dispositions role removal requests for CPOC and SRT roles | • Authority specific                                                                             |
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| CMS CO Admin (CCA)        | • CMS Central Office staff with direct responsibility for implementing and/or administering the quality measurement programs  
• Reviews and approves/denies CMS CO/RO, Researcher, and Technical Assistance/Analytic Support role requests  
• *Reviews and dispositions role removal requests for CMS CO/RO, Researcher, and Technical Assistance/Analytic Support roles*  
• *Reassigns tasks on behalf of CMS CO Admin and Technical Assistance/Analytic Support roles* | • Cannot request CSA role |

*Note:* The italics indicate actions that are specific to user roles.
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<tr>
<td>CMS Senior Reviewer</td>
<td>• Views system reports</td>
<td>• Cannot request CSA</td>
</tr>
<tr>
<td></td>
<td>• Evaluates recommended submission package dispositions</td>
<td>• Cannot be Package Disapprover on the same package</td>
</tr>
<tr>
<td></td>
<td>• Reviews the submission package disapproval justification</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• <em>Reassigns tasks for Package Approver/Disapprover, Disapproval Coordinator, Senior Reviewer, and CPOC</em></td>
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Knowledge Check

Survey:
Which of the following roles CANNOT reassign tasks on behalf of another user?

A. Senior Reviewer  
B. State Director  
C. State System Admin  
D. CMS Role Approver
The State Director role does NOT have the ability to reassign tasks on behalf of another user.
Survey:
True or False?
Prior to this update, users were able to request a role removal in MACPro.

A. True
B. False
Knowledge Check

Answer: B. False

Prior to this new update for User Management, users were NOT able to request a role removal in MACPro.
Agenda

- Updates to MACPro User Management Functionality
- Applicable MACPro Administrative Roles

Additional Resources

- Help Desk/Technical Assistance
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Additional Resources

♦ MACPro Role and Administrative Training Slides

♦ MACPro Role and Administrative Training Video
  - https://www.youtube.com/watch?v=3yOfo992Dms&feature=youtube
Questions?
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- **Help Desk/ Technical Assistance**
- Final Questions
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Help Desk and Technical Assistance

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<thead>
<tr>
<th>Browser</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. <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>Software</td>
<td>Version necessary to access MACPro</td>
</tr>
<tr>
<td>-------------------------</td>
<td>-----------------------------------------------------------------------------------------------</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>
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Help Desk and Technical Assistance

- Contact the MACPro Help Desk
  - Email: MACPro_Helpdesk@cms.hhs.gov
  - Phone: 301–547–4688
- Within MACPro, select "Request System Help" link
Information to provide in your email request:

- User contact information (Name, callback number, organization/state, email address, User ID)
- Component (Medicaid State Plan/Quality Measures)
- Authority (AQM, CCQM, MCQM, MIH, HHQM, Administration, HHSPA, Eligibility)
- Detailed description of your inquiry
- Last screen/tab/navigation activity before problem
- Screenshots
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Role Requests: Adding, Modifying, and Removing

✦ All MACPro users have the ability to:
  ✦ Add a new role
  ✦ Modify a current approved role
  ✦ Remove a current approved role

✦ All requests are routed to the appropriate role approver to be approved or denied.
Role Requests: Approving or Denying

- Role approvers will receive an email notification letting them know that there is a pending role request awaiting their approval.
- Role approvers have the ability to:
  - Place requests in their queue
  - Enter notes if desired
  - Approve role requests
  - Deny role requests
  - Approve role removal requests
  - Deny role removal requests
Task Reassignment for Self

Self Task Reassignment applies to:

- State Editor
- State Point of Contact
- State Director
- CMS Point of Contact
- CMS Central Office Administrator
- Senior Reviewer
- Package Approver
- Package Disapprover
- Disapproval Coordinator
- Technical Assistance/Analytic Support roles
These users will be shown a list of MACPro users with matching attributes to whom the task can be reassigned.

The new assignee will receive an email notification once the task is reassigned.

The original owner will receive an email notification letting them know that the task is no longer in their queue.
Task Reassignment on Behalf of Others

Task Reassignment on the behalf of others applies to:

- State System Administrator
- CMS System Administrator
- CMS Role Approver
- CMS Central Office Administrator
- Senior Reviewer
These users will be shown a list of eligible tasks and MACPro users with matching attributes to whom the task can be reassigned.

The new assignee will receive an email notification once the task is reassigned.

The original owner will receive an email notification letting them know that the task is no longer in their queue.