Agenda

- Transition to MACPro
- How Do I Obtain Access to MACPro?
- State MACPro User Roles
- Overview of Creating, Reviewing, and Submitting Medicaid MAGI Eligibility and Administration State Plan Amendments (SPAs)
- Step-by-Step In-System Demonstration
- Help Desk/Technical Assistance
- Additional Resources
- Questions?
Transition to MACPro

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Transition to MACPro

MACPro will include the following state plan authorities on August 28\textsuperscript{th}, 2017:

- Mandatory and optional MAGI-based eligibility groups
- Additional eligibility sections including state residency, citizenship/immigration, and presumptive eligibility
- Single State Agency sections
**Transition to MACPro**

- **MAGI and Admin. SPA functionality will be available in MACPro on Monday, August 28th, 2017:**
  - All new SPAs will be submitted through MACPro
    - States will no longer submit new SPAs in MMDL
  - SPAs currently submitted through MMDL will be transitioned to MACPro
  - SPAs that are officially submitted in MMDL on or before **Friday, August 25th, 2017** will continue to be processed in MMDL
  - States will need to close out any draft SPAs that are currently under development in MMDL
Transition from the MMDL to MACPro:

- Approved Medicaid eligibility SPA data from MMDL will be copied into MACPro to simplify the creation of new SPAs and to be used as a reference material.
  - Except where the MMDL and MACPro templates differ, states will find the MACPro screens prepopulated with available information.

NOTE: PDF copies of Medicaid MAGI Eligibility and Admin. SPA packages approved in MMDL will be viewable in MACPro.
How Do I Obtain Access to MACPro?

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How do I Obtain Access to MACPro?

What is EIDM?
- Enterprise Identity Management (EIDM) is an identity management and services system that provides users with access to CMS applications.
- EIDM is accessed through the CMS Enterprise Portal address ([https://portal.cms.gov](https://portal.cms.gov)).

Which EIDM Role for MACPro should I request?
- All State users should request the “MACPro State User” role for MACPro.

When do I obtain an EIDM ID and EIDM role for MACPro?
- All new users may obtain EIDM IDs and/or request an EIDM role for MACPro now, if they do not have one already.

*Please note, users should only hold one EIDM ID, even if accessing multiple CMS applications through the EIDM Portal.*
How do I Obtain Access to MACPro?

What is a MACPro role?
- Distinct user roles have been established for CMS, state, and business support users within MACPro (https://macpro.cms.gov). These roles determine in what capacity a user will utilize MACPro.

When do I obtain my MACPro role?
- You should have received an email from MACPro@cms.hhs.gov notifying you to request your MACPro role(s) for the Medicaid Eligibility and Administration SPA authorities including detailed instructions.
State MACPro User Roles

- Transition to MACPro
- How Do I Obtain Access to MACPro?

**State MACPro User Roles**

- Overview of Creating, Reviewing, and Submitting Medicaid MAGI Eligibility and Admin. SPAs
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MACPro has numerous distinct state user roles

MACPro roles determine users’ range of available actions and responsibilities

MACPro roles differ from those currently used in other CMS web-based systems (e.g., CARTS, MMDL, WMS)
State User Roles

- **State Editor (SE)**
  - Builds submission packages

- **State Point of Contact (SPOC)**
  - Reviews, edits, and submits submission packages

- **State Director (SDIR)**
  - Conducts final review and certifies submission packages

- **State System Administrator (SSA)**
  - Approves state role requests and maintains the state profile
State User Functionalities

- **Submission Packages**
  - Compilation of state plan templates

- **Reviewable Units (RUs)**
  - MACPro version of state plan templates

- **Task List**
  - To do list for workflow actions

- **Correspondence Log**
  - Tool for communication between CMS (CPOC) and the State (SPOC)
State User Functionalities

 관한 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
Transition to MACPro

How Do I Obtain Access to MACPro?

State MACPro User Roles

Overview of Creating, Reviewing, and Submitting Medicaid MAGI Eligibility and Admin. SPAs

Step-by-Step In-System Demonstration

Help Desk/Technical Assistance

Next Steps

Questions?
Official Spa Submission: State Workflow

State Editor creates SPA package and completes/validates Reviewable Units

State Editor sends package to State Point of Contact for review

State Point of Contact reviews package and includes any needed updates

State Point of Contact returns package to State Editor for further edits

State Director reviews the package (cannot edit information)

State Director sends package to State Point of Contact for submission

State Director certifies and sends package to State Point of Contact for submission

State Point of Contact submits package to CMS for their review

State Point of Contact sends package to CMS for submission
Step-by-Step In-System Demonstration

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- **Step-by-Step In-System Demonstration**
  - Help Desk/Technical Assistance
  - Next Steps
  - Questions?
Today’s System Demo Roadmap

- **State Admin:** State Profile creation/update
- **SE:** Create an official Submission Package and send to the SPOC
- **SPOC:** Review submission package and forward to SDIR
- **SDIR:** Review and certify submission package
- **SE:** Create an official submission package
- **SPOC:** Send draft submission package to CMS
- **SPOC:** Close draft submission from CMS
- **SE:** Convert draft submission package to official and complete Submission RUs
- **SPOC:** Respond to a clarification request
- **SPOC:** Respond to an RAI request
The State Profile may only be created or updated by the State System Administrator.

Your state must have a State Profile prior to submitting a submission package.

The State Profile includes basic information such as:

- Addresses
- Medicaid Key Contacts
- CHIP and Medicare Information
- Public Notice Methods
The State Editor creates the submission package and completes the information.

Medicaid Eligibility and Admin. submission packages are divided into “Reviewable Units” – all must be in “Complete” status to forward to SPOC.

Reviewable Units are sections within the submission package that are validated and saved one at a time.
The State Point of Contact (SPOC) reviews and edits the package.

SPOC has the option of 2 actions after reviewing:

- **Forward** the package to the State Editor for further **edits**.
- **Forward** the package to the State Director for review and certification.
State Director
Review and Certification

- The State Director reviews the package, but cannot edit the information.

- The State Director may take two actions:
  - **Return** the submission package to the SPOC for further edits.
  - **Certify** the submission package and return to the SPOC for submission to CMS.
SPOC Submits the Submission Package to CMS

◊ SPOC receives the package from the State Director after certification

◊ The SPOC may take three actions:
  ◦ **Modify** the submission package
    ◦ If this occurs, the State Director will need to re-review and re-certify
  ◦ **Forward** the submission package to the State Editor for further edits
    ◦ If this occurs, the SPOC and SDIR will need to re-review and re-certify
  ◦ **Submit** the submission package to CMS
When to Use a **Draft** vs. an **Official** Submissions

**Draft Submissions**
- Utilize this submission package type when significant feedback is required prior to starting the 90 day policy clock.
  - *You may allow CMS to view your information prior to submission in an informal manner utilizing the “Allow CMS to View” functionality*

**Official Submissions**
- Utilize this submission package type when you are prepared to submit your submission package to CMS and start 90 day clock.
  - *You may allow CMS to view your information prior to submission in an informal manner utilizing the “Allow CMS to View” functionality*
1. **State Point of Contact** closes the Draft Submission Package
   - Once closed, the state may not edit draft submission package content prior to official submission to CMS (aside from Tribal Input and Public Comment RUs)

2. **State Editor** accesses closed submission package record and converts from Draft to Official

3. **State Editor** updates, validates, and saves Submission Form Reviewable Units
   - Tribal Input and Public Comment RUs

4. **State Editor** initiates review process
   - SPOC review, SDIR review and certification, and SPOC submission to CMS
**Difference Between Draft and Official Submissions**

**Draft Submissions**
- Submitted to CMS, does not start the 90 day clock; state may allow CMS to view prior to submission
- CMS may review, but cannot approve, disapprove, or RAI
- CMS returns the submission to the state and may provide feedback in the Correspondence Log or offline
- If the state chooses not to edit the returned draft package, it may be closed and converted to an official package for submission to CMS starting the 90 day clock
- If state chooses to edit the returned submission package, the state must re-submit the draft to CMS off the regulatory clock.

**Official Submissions**
- Submission starts the 90 day clock
- CMS may review and approve
- CMS may implement RAI or Clarification
- During the editing process, the state may allow CMS to view prior to submission
Clarification process does not stop the 90 day clock
Responding to a Clarification Request

- The State Point of Contact (SPOC) receives notice of Clarification request from CMS
- SPOC reads Correspondence Log entry with questions CMS has about the submission package
- SPOC has the option to perform 3 actions:
  - **Return** the package to the State Editor for further *edits*
  - **Modify** the submission package
  - **Re-submit** the package to CMS
• RAI process *stops* the 90 day clock
Responding to an RAI Request

- The State Point of Contact (SPOC) receives notice of RAI from CMS including an RAI form with questions.
- If the CPOC and SPOC have offline discussions, the SPOC may document the communication officially in the Correspondence Log.
- SPOC has the option to perform 3 actions in addition to responding to questions in the RAI form:
  - Return the package to the State Editor for further edits
  - Edit the submission package
  - Re-submit the submission package to CMS
Once a submission package is approved, it needs to be acknowledged by the SPOC.

Below is an example of the Task notification:

Me

Acknowledge Package Receipt - MO2017MS0025O - (MO-17-1984)
A moment ago  ✭
Acknowledging an Approved Package

- Once a submission package is approved, it needs to be acknowledged by the SPOC.

**Route Package Form - MO2017MS00250**

- **Package Information**
  - Package ID: MO2017MS00250
  - Program Name: N/A
  - SPA ID: MO-17-1984
  - Version Number: 3
  - Submitted By: Training SPOC
  - Package Disposition: Acknowledged

- **Audit Information**
  - Created By: Training SE
  - Created Date: 5/25/2017 2:00 PM EDT

- **Instructions**
  - From: Training CPOC
  - Instructions: None

- **Choose Action**
  - Available Workflow Actions:
    - Acknowledge the Approved Submission Package

- **EXECUTE ACTION**
# MACPro Reports

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
<th>Available For:</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Agency Profile Report</td>
<td>Overview of a State’s Medicaid Plan including the prior 12 months' submission package history</td>
<td>State Editor, State Point of Contact; State Director, State System Administrator</td>
</tr>
<tr>
<td>Submission Detail Report</td>
<td>View details on packages by date</td>
<td>State Editor, State Point of Contact; State Director, State System Administrator</td>
</tr>
<tr>
<td>Submission Statistics Detail Report</td>
<td>View all Submission Packages currently in review</td>
<td>State Editor, State Point of Contact; State Director, State System Administrator</td>
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</table>
# MACPro Reports Continued

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Description</th>
<th>Available For:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Submission Summary Report</td>
<td>Overview of submitted packages by date</td>
<td>State Editor, State Point of Contact; State Director, State System Administrator</td>
</tr>
<tr>
<td>Submission Statistics Summary Report</td>
<td>View the statistics summary of Submission Packages by review status and date</td>
<td>State Editor, State Point of Contact; State Director, State System Administrator</td>
</tr>
</tbody>
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Help Desk/ Technical Assistance

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Help Desk/ Technical Assistance

- Next Steps
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Help Desk and Technical Assistance

◊ For issues related to MACPro access and how to use the MACPro system

◆ Contact the MACPro Help Desk at

◊ Email: MACPro_Helpdesk@cms.hhs.gov
◊ Phone: 301–547–4688

◆ Click Request System Help link within MACPro
Information to provide in email request

- User contact information (Name, phone number, organization/state, email address, User ID)
- Component (Medicaid State Plan/Quality Measures)
- Authority (Eligibility or Administration)
- Detailed description of your inquiry
- Last screen/tab/navigation activity before problem
- Screenshots
## Help Desk and Technical Assistance (cont.)

<table>
<thead>
<tr>
<th>Web Browser</th>
<th>Version necessary to access MACPro</th>
<th>Print to PDF Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Google Chrome (Optimal Web Browser)</td>
<td>• Google Chrome updates automatically. The most recent version is supported</td>
<td>• Use Print Function to save as PDF</td>
</tr>
<tr>
<td>Mozilla Firefox</td>
<td>• Mozilla Firefox updates automatically. The most recent version is supported</td>
<td>• Not supported without additional browser add-ons</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Consult your IT/System partners about the add-ons available</td>
</tr>
<tr>
<td>Microsoft Internet Explorer</td>
<td>• Version 11</td>
<td>• Not supported without additional software.</td>
</tr>
<tr>
<td></td>
<td>• Users who attempt to access MACPro using Microsoft Internet Explorer browser versions lower than 11 will see a screen indicating that they are using an unsupported browser. Login will be prevented</td>
<td>• Requires a print-to-PDF program such as Adobe Acrobat</td>
</tr>
</tbody>
</table>
### Help Desk and Technical Assistance (cont.)

<table>
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<tr>
<th>Software</th>
<th>Version necessary to access MACPro</th>
<th>Print to PDF Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 10</td>
<td>• Not applicable. Software does not impact ability to access MACPro</td>
<td>• Use Print Function and select Microsoft Print to PDF</td>
</tr>
<tr>
<td>OS X Yosemite</td>
<td>• Not applicable. Software does not impact ability to access MACPro</td>
<td>• Requires a print-to-PDF program such as Preview or Adobe Acrobat</td>
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Additional Resources

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**Additional Resources**

- Questions?
 Obtain an EIDM ID and request your appropriate EIDM Role for access to MACPro, if you do not already have one

- Instructions are available to assist with this process at:
Additional Resources

Videos demonstrating the necessary steps in EIDM are also available:

- New User Registration via CMS Enterprise Identity Management Portal
  - This video walks you through the steps necessary to obtain an EIDM ID as a new user
    - https://www.youtube.com/watch?v=RcoL3YZFxmU&list=PLaV7m2-zFKpgYq_8AHW-FYM61J295xwLC&index=4

- Submitting a Role Request and Completing Remote Identity Proofing (RIDP)
  - This video describes the steps required to submit a role request for a specific application within EIDM, such as MACPro
    - https://www.youtube.com/watch?v=OmL4jOOQ7Rc&index=1&list=PLaV7m2-zFKpgYq_8AHW-FYM61J295xwLC
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