MACPro
Medicaid & CHIP Program System

Medicaid and CHIP Program (MACPro) System

Medicaid MAGI Eligibility and Administration

CMS User In-System Demonstration

2017

Agenda

◈ Transition to MACPro

◈ How Do I Obtain Access to MACPro?

◈ Medicaid State Plan CMS MACPro User Roles

◈ Overview of Reviewing and Approving 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

◈ **Transition to MACPro**

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Transition to MACPro

◈ **MACPro will include the following on August 28, 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

Transition from the MMDL to MACPro:

❖ Medicaid MAGI Eligibility and Admin. SPAs currently being processed in MMDL will be completed in MMDL

❖ As of August 28th, 2017, all new SPA actions should be made in MACPro and MMDL will no longer accept new SPA submissions

❖ Draft SPAs will no longer be accessible in MMDL as of August 25th

❖ When subsequent SPAs are submitted and approved in MACPro, they will become the official record

❖ PDF Copies of Medicaid MAGI Eligibility and Admin. SPA packages, approved in MMDL, may be viewed in MACPro

Transition to MACPro

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

How to Access MACPro

- ◈ Transition to MACPro

- ◈ **How Do I Obtain Access to MACPro?**

- ◈ Medicaid State Plan CMS MACPro User Roles

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How to Obtain MACPro Access

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)

Which EIDM Role for MACPro should I request?

◈ All CMS users should request the "MACPro CMS Staff" 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 <u>one</u> EIDM ID, even if accessing multiple CMS applications through the EIDM Portal.

How to Obtain MACPro Access

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

Medicaid State Plan CMS MACPro User Roles

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MACPro Medicaid State Plan CMS User Roles

◈ CMS and state users have many distinct roles in MACPro

◈ MACPro roles determine users' range of available actions, responsibilities, and which reports can be accessed

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

◈ MACPro Medicaid State Plan (<u>Eligibility, Administration, and Health Homes)</u> CMS roles differ from MACPro <u>Quality Measure</u> CMS Roles

MACPro Medicaid State Plan CMS User Roles

- **CMS Point of Contact (CPOC)**
- **CMS Submission Review Team (SRT)**
- **CMS Senior Reviewer**
- **CMS Disapproval Coordinator**
- **CMS Package Approver (PA)**
- **CMS Package Disapprover (PD)**

- CMS System Administrator (CSA)*
- CMS Report Admin
- CMS Role Approver (CRA)*
- CMS Subscriber

Bolded roles refer to those essential for completing the CMS workflow in MACPro. Roles with an asterisk (*) indicate that the role has administrative functions and must attend the MACPro administrative training.

Overview of Reviewing and Approving

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CMS User Functionalities

- ◈ **Submission Packages**
  - ◆ Compilation of state plan templates
- ◈ **Reviewable Units (RUs)**
  - ◆ MACPro version of state plan templates
- ◈ **Review Tool**
  - ◆ Method for officially documenting submission review for CPOC and SRT
- ◈ **Analyst Notes**
  - ◆ Tool for internal communication between CPOC and SRT during submission review
- ◈ **Correspondence Log**
  - ◆ Tool for communication between CMS (CPOC) and the State (SPOC)

CMS User Functionalities

◈ **Task List**

  ◆ To do list for workflow actions

◈ **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

Official SPA Submission: CMS <u>Approval</u> Workflow
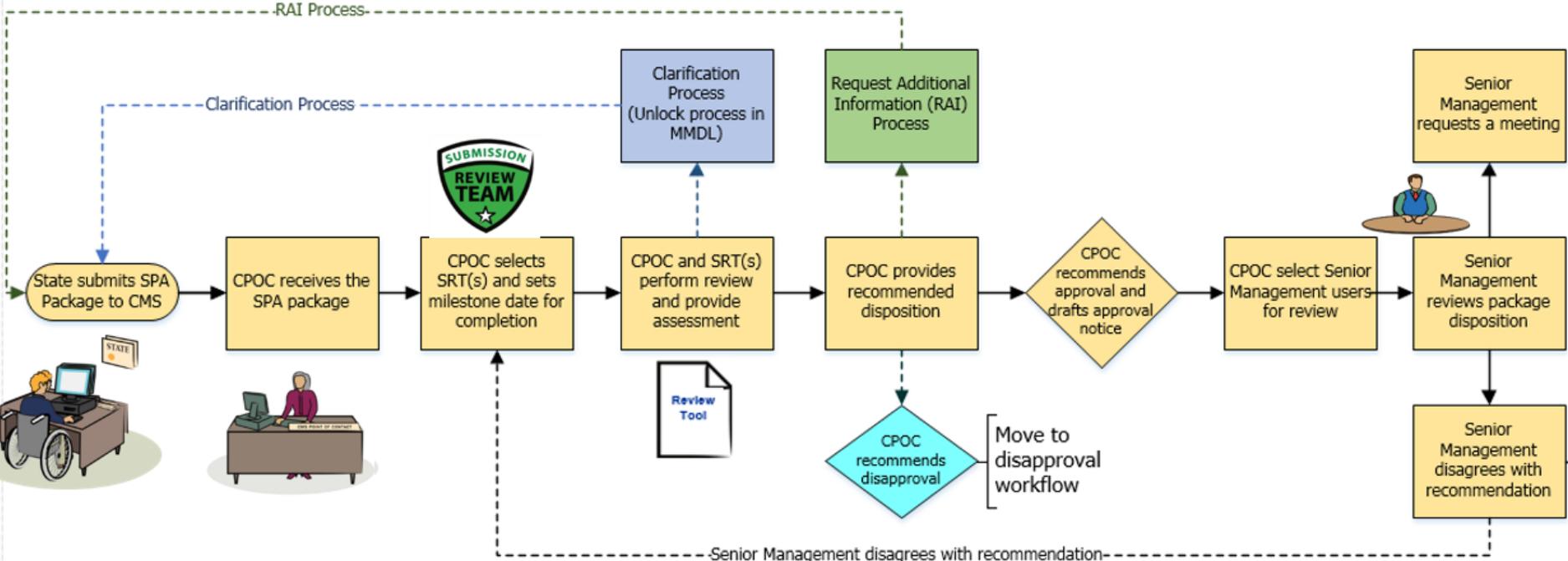
Official SPA Submission: CMS Approval Workflow
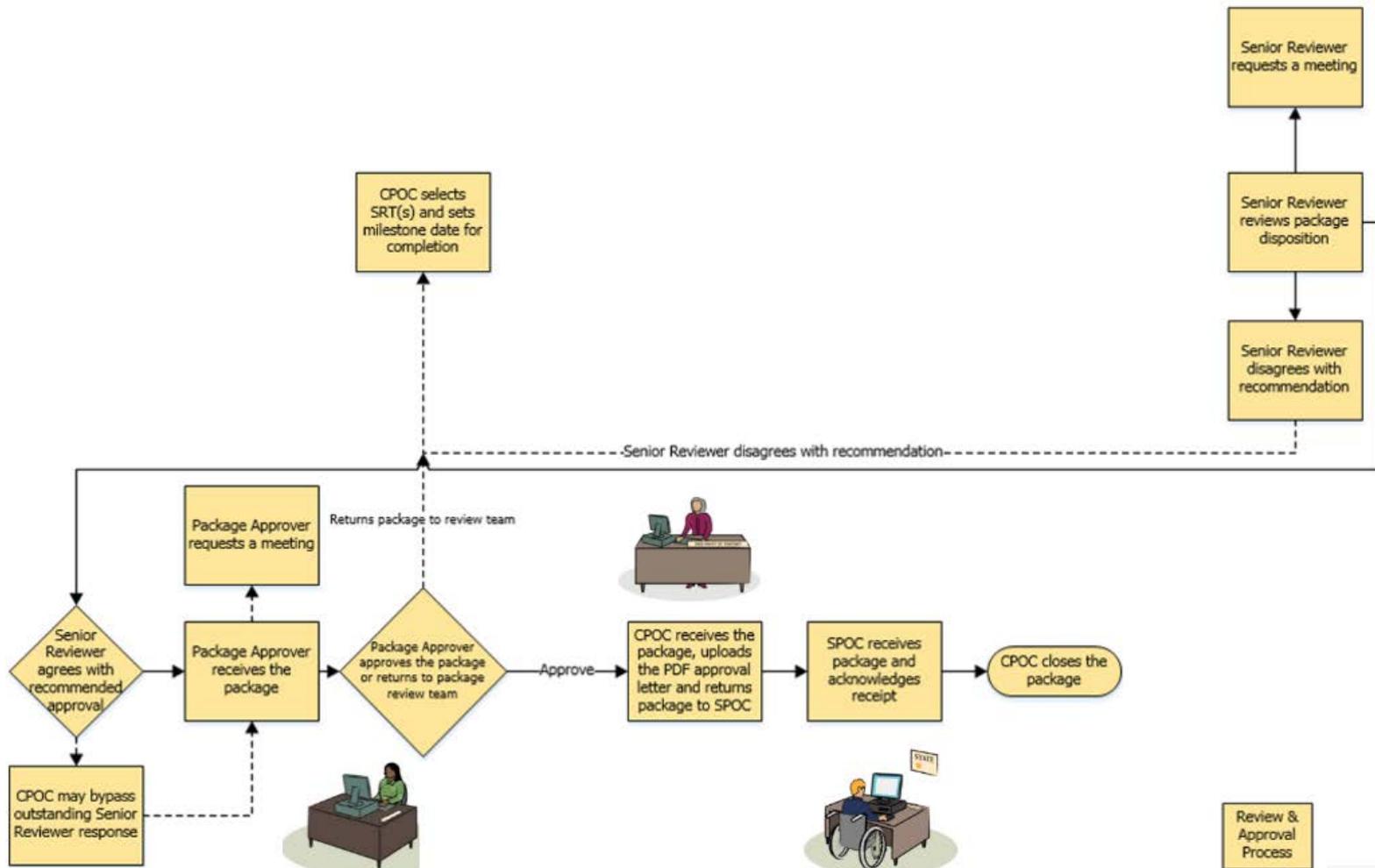
Official SPA Submission: CMS <u>Approval</u> Workflow
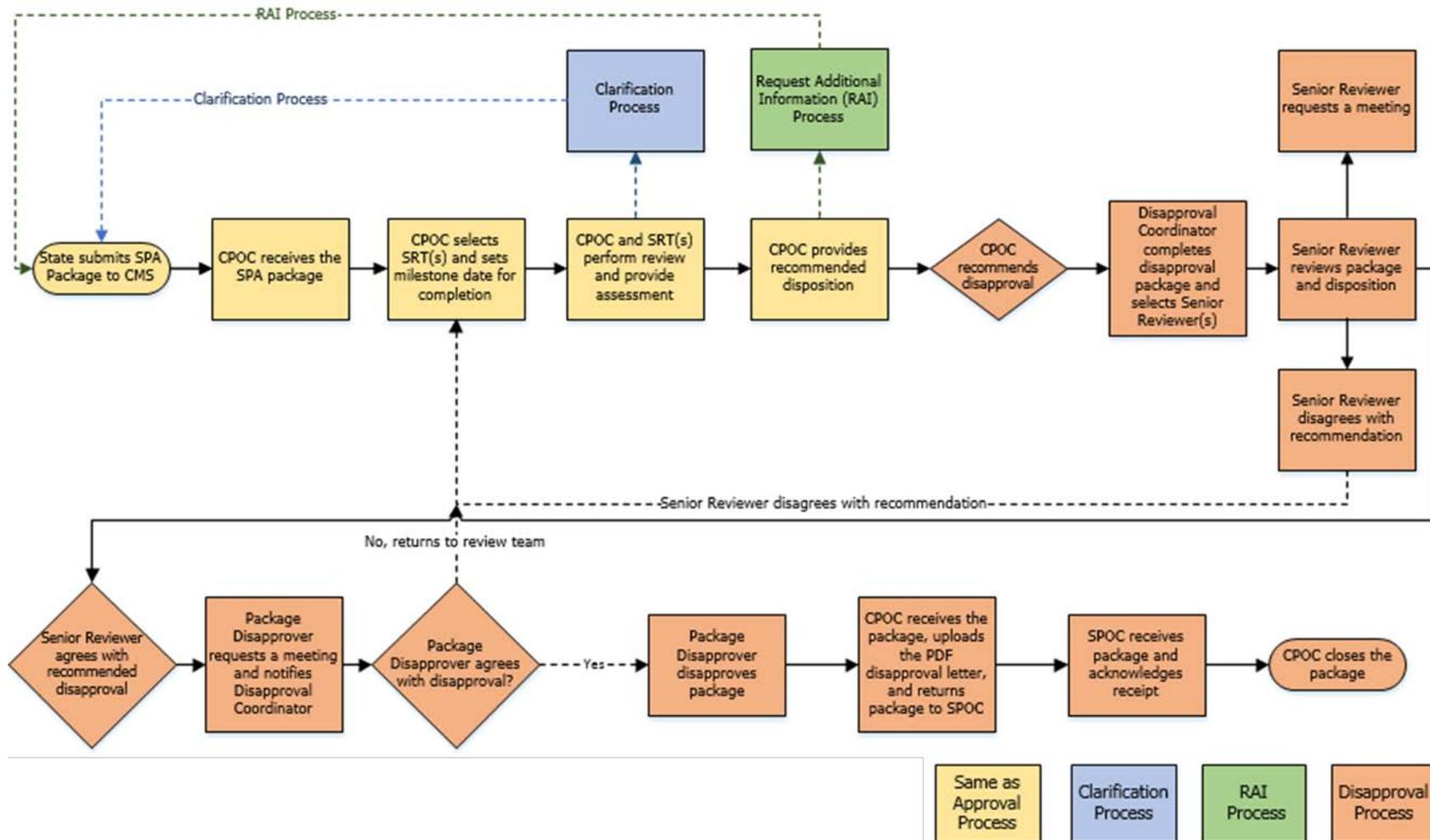
Official SPA Submission: CMS <u>Disapproval</u> Workflow
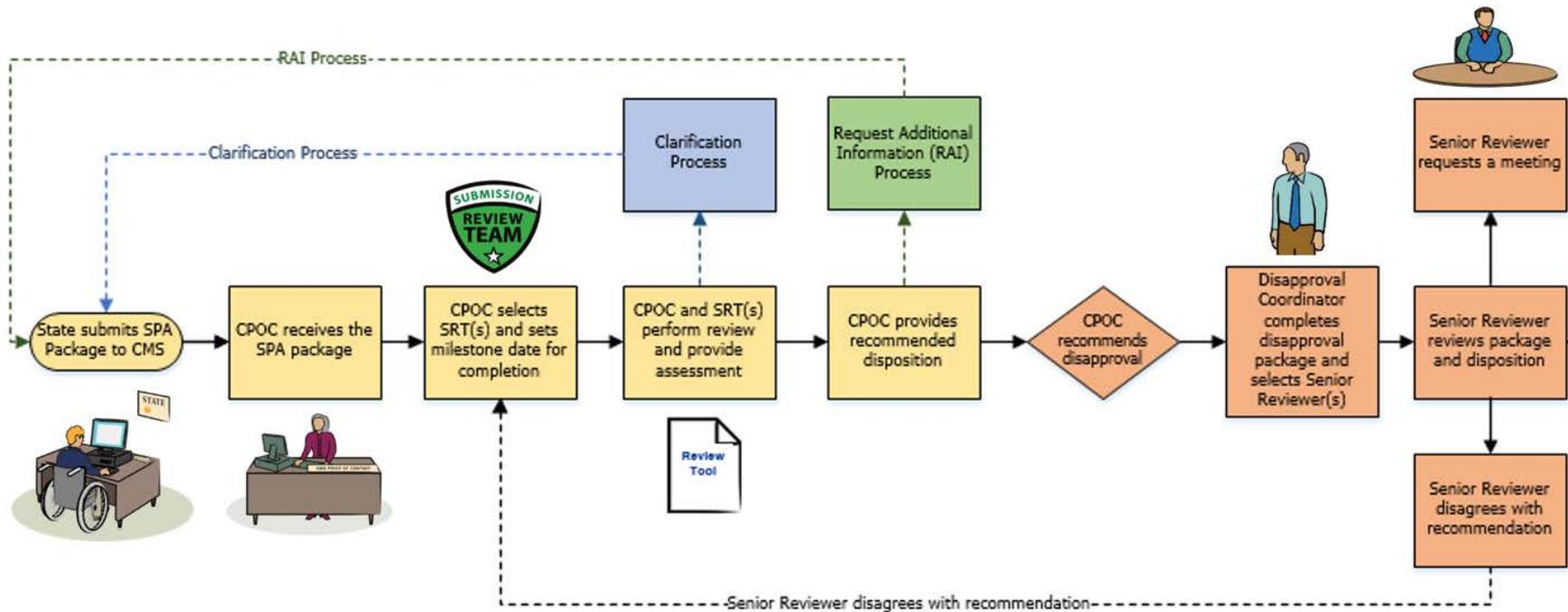
Step-by-Step In-System Demonstration

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◈ **Step-by-Step In-System Demonstration**

◈ Help Desk/Technical Assistance

◈ Additional Resources

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Today's System Demo Roadmap

- ❖ **CPOC:** Select SRT member(s) and set Milestone date
- ❖ **CPOC & SRT:** Review submission package and provide assessment
- ❖ **CPOC:** Initiate Clarification process
- ❖ **CPOC & SRT:** Review submission package and provide assessment
- ❖ **CPOC:** Initiate RAI process
- ❖ **CPOC & SRT:** Review submission package and recommend disposition
- ❖ **CPOC:** Draft Approval Notice
- ❖ **CPOC:** Select Senior Reviewer(s)
- ❖ **Senior Reviewer:** Review submission package disposition and agree with approval
- ❖ **Package Approver:** Approve submission package
- ❖ **CPOC:** Upload approval documentation
- ❖ **CPOC:** Close submission package

CMS Point of Contact Review

- ◈ The CMS Point of Contact (CPOC) assigns Submission Review Team Members (SRT)

- ◈ The CPOC sets a Milestone Date

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

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Submission Review Team
Reviews Submission Package

◈ Submission Review Team (SRT) member provides Review Assessment via the Review Tool

◈ SRT(s) enters Analyst Notes

Analyst Note Types

Analyst Note Type	Description	Visible By:
Note to Self	Private note for self only	Self
For POC (Formal Review)	Indicates information that should be included in disposition	CPOC
For Review Team	For other Review Team members	CPOC and SRT
For RAI	Indicates something that requires RAI	CPOC and SRT
For Correspondence Log	Indicates information that is recommended to be communicated to the SPOC	CPOC and SRT
Non SRT-User	Note on behalf of a CMS participant outside of the Review Team	CPOC and SRT
General Note	A note that doesn't fall into another category	All
Justification	Provides basis for recommended disposition	CPOC and SRT
Post-Recommendation	Included by other CMS users during the package disposition review	CPOC and SRT

CMS Point of Contact Review

◈ The CPOC accesses Review Tool Report

◈ CPOC provides Review Assessment via the Review Tool

◈ CPOC creates correspondence log and adds questions to the State

◈ CPOC initiates clarification

Clarification Process: Detailed View
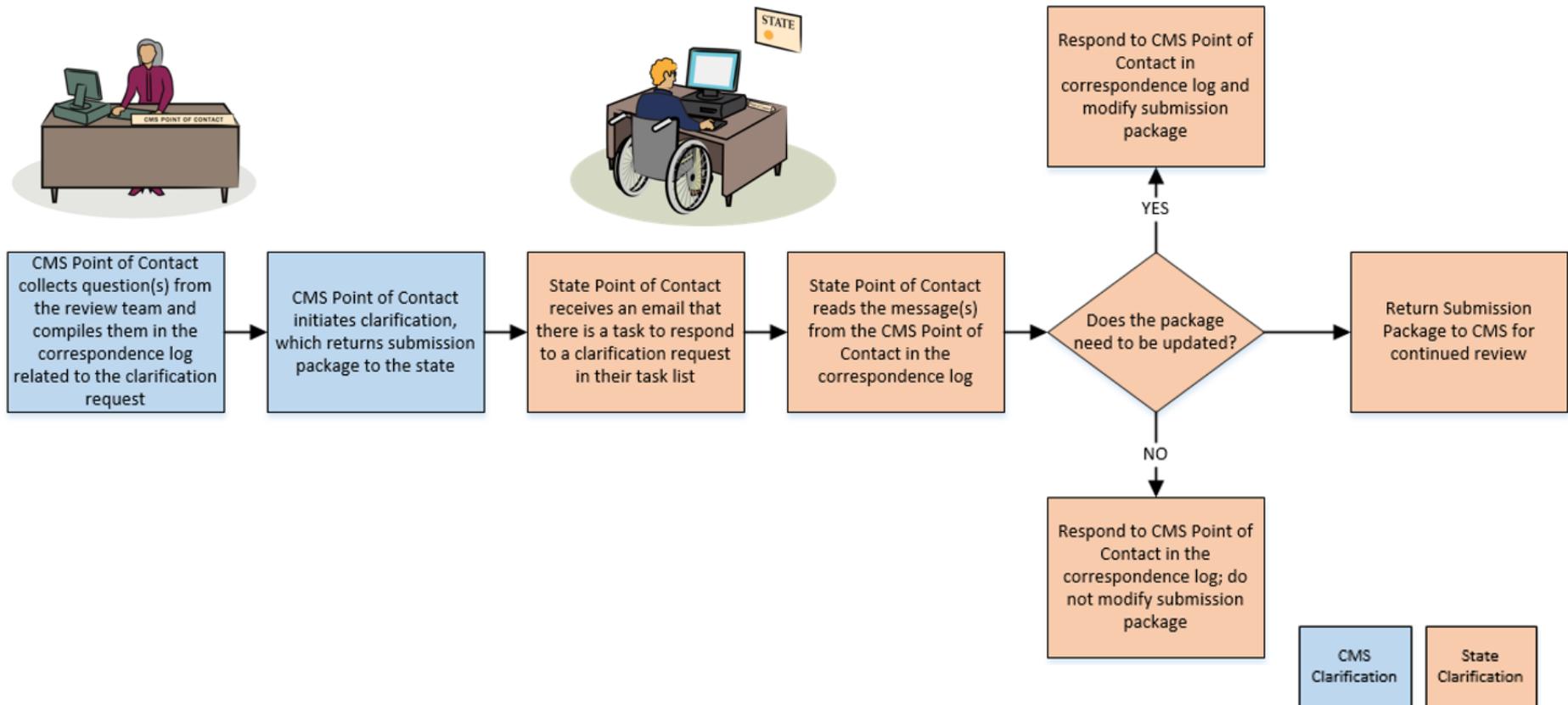
- Clarification process does *not* stop the 90 day clock

Roadmap to Clarification

1. **CPOC** selects SRTs to review all or part of the submission package and sets milestone date for completion

2. **CPOC and SRTs** review and provide their assessments in the Review Tool. If there are questions/comments, they may be entered via Analyst Notes in the Review Tool on each section of the package

3. **CPOC and SRTs** determine if clarification is needed from the state

4. **CPOC** compiles questions from the Review Tool and enters them into the Correspondence log

5. **CPOC** initiates clarification in MACPro which returns submission package back to the state

Submission Review Team
Reviews Submission Package

◈ Submission Review Team (SRT) member accesses Compare Doc Change Report to view changes made by State

◈ SRT(s) reviews the Submission Package and completes the Review Tool following clarification

CMS Point of Contact Review

- The CMS Point of Contact (CPOC) initiates RAI, or Request Additional Information

- The CPOC completes the RAI Form and returns the Submission Package to the State

- If the CPOC and State Point of Contact have offline discussions, the communication may be documented officially in the Correspondence log

RAI Process: Detailed View
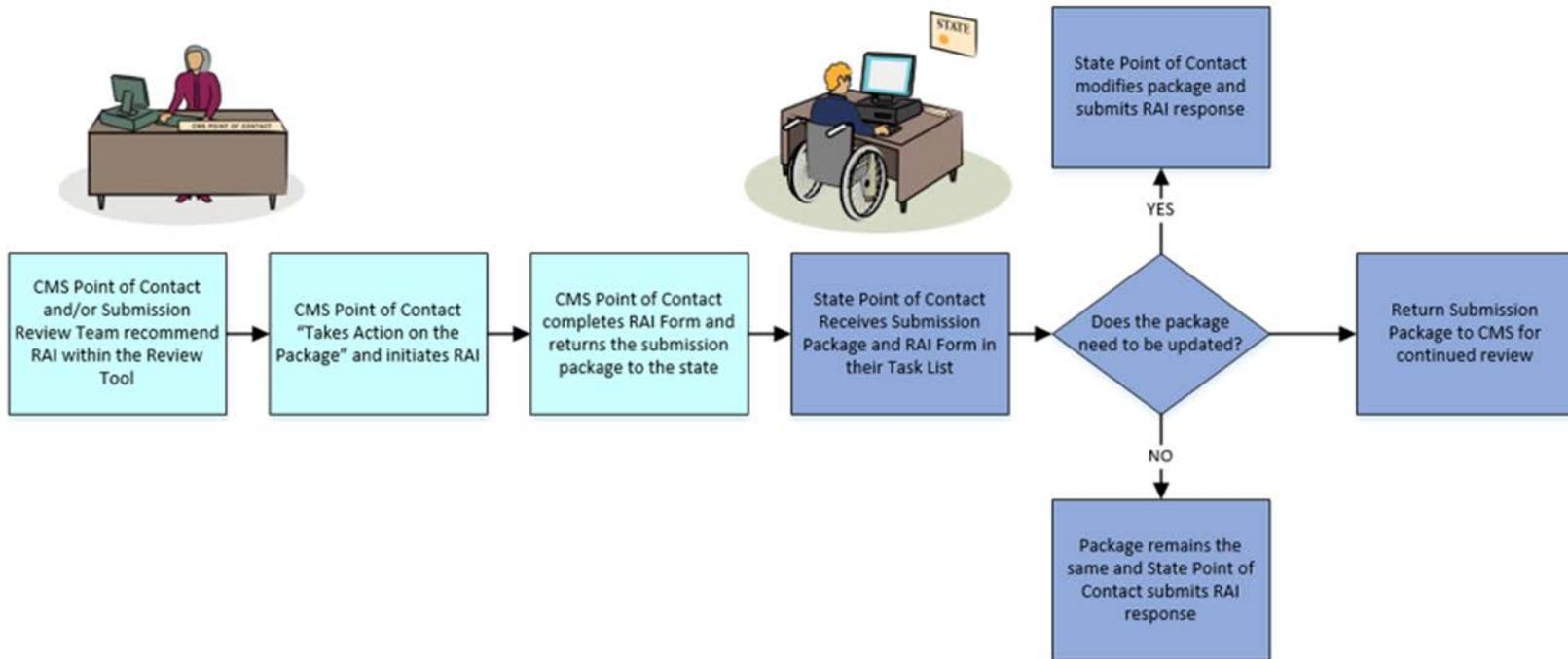
- RAI process *stops* the 90 day clock

CPOC Reviews State's Response to RAI And Recommends Approval

- ◈ The CMS Point of Contact (CPOC) views the State's response to RAI
- ◈ The CPOC assigns Submission Review Team Members and sets the Milestone Date
- ◈ The CPOC or the SRT members review the package
- ◈ CPOC has the option to perform 3 actions:
  - ◆ <u>Request</u> Clarification regarding the Submission Package
  - ◆ <u>Recommend</u> Approval
  - ◆ <u>Recommend</u> Disapproval
- ◈ CPOC completes Approval Package
- ◈ CPOC selects Senior Reviewers for Submission Package and sends the package for review

Senior Reviewer Agrees
With Recommended Approval

◈ The Senior Reviewer has the option to perform 3 actions:

 ◆ Agree with the Recommended Approval

 ◆ Disagree with the Recommended Approval

 ◆ Request a Meeting regarding the Recommended Disposition

◈ The Senior Reviewer agrees with the Recommended Approval and submits his/her decision

Package Approver Approves The Submission Package

◈ The CMS Package Approver signs the Approval Notice

◈ CMS Package Approver has the option to Request a Meeting or Take Action on the Package

◈ Once the Package Approver Takes Action on the Package, his/her options are to Approve the Official Submission Package or Return the Submission Package to CPOC and SRT for review

CMS Point of Contact Attaches Approval Documents

◈ The CMS Point of Contact uploads the PDF of the Approval Letter and submits the Submission Package to the State Point of Contact to acknowledge Approval

CMS Point of Contact
Closes The Package

◈ Once the State Point of Contact acknowledges approval, the CMS Point of Contact needs to close the submission package

◆ Below is an example of the Task notification

CMS Point of Contact Closes The Package

◈ Choose the workflow action to Close the Approved Submission Package

CMS Point of Contact Closes The Package

◈ Select Execute Action

◈ Select Yes to Close the Approved Submission Package
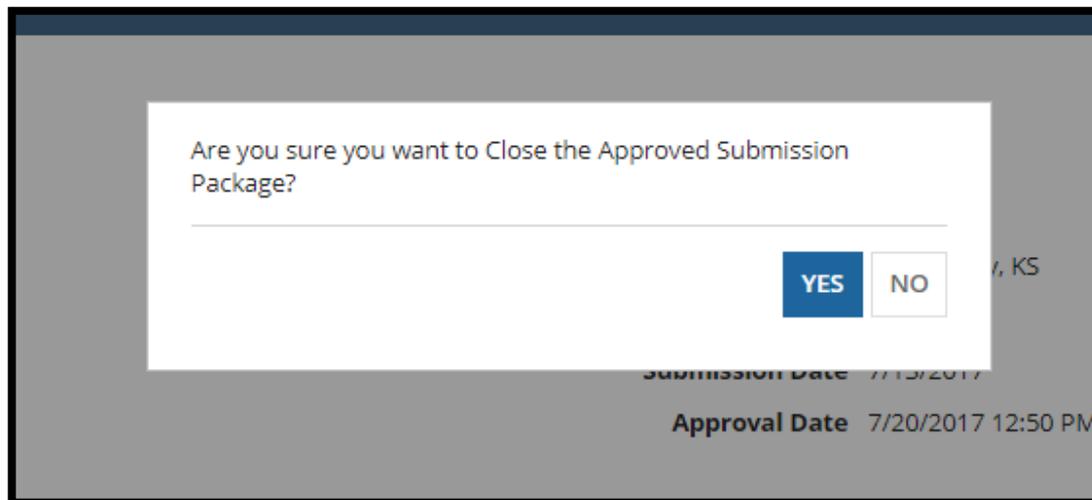
Official SPA Submission: CMS **Disapproval** Workflow
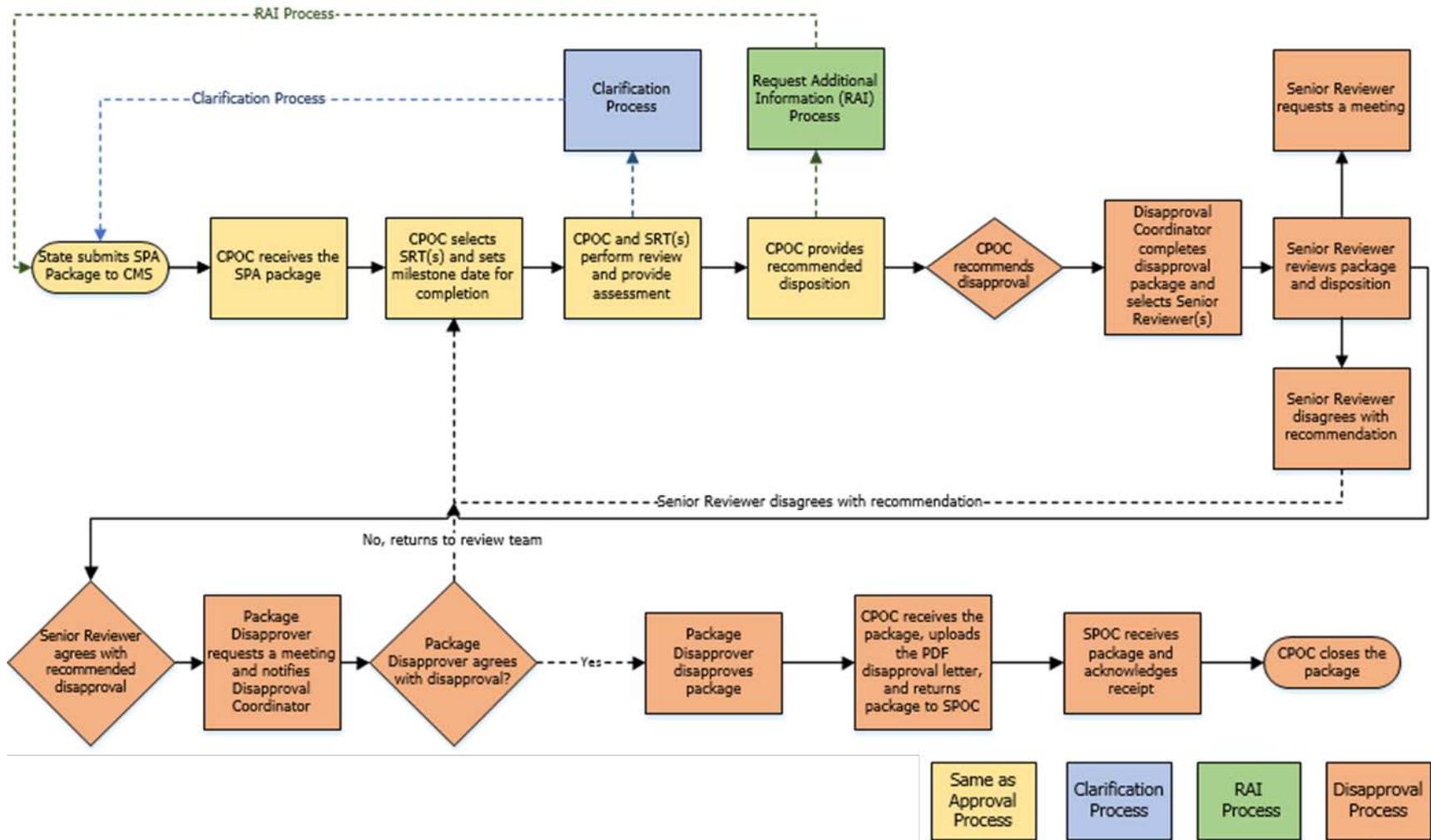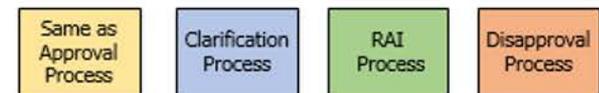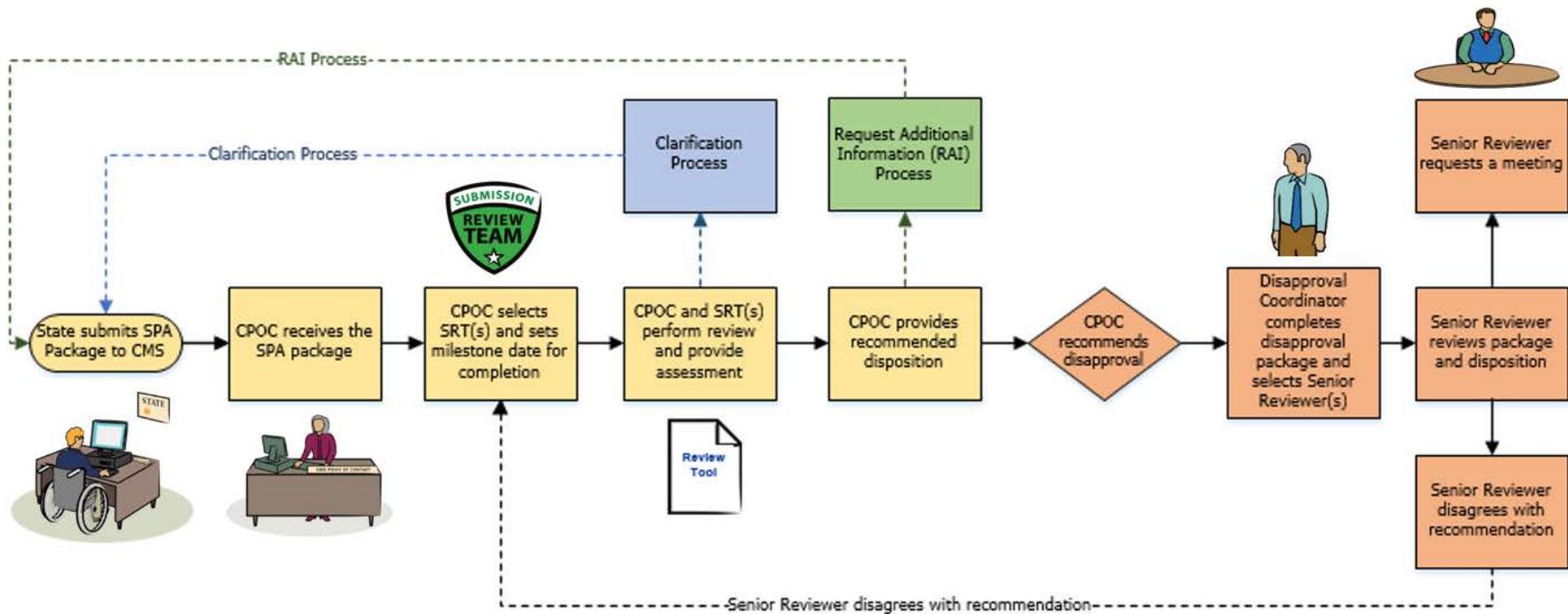
Official SPA Submission: CMS <u>Disapproval</u> Workflow
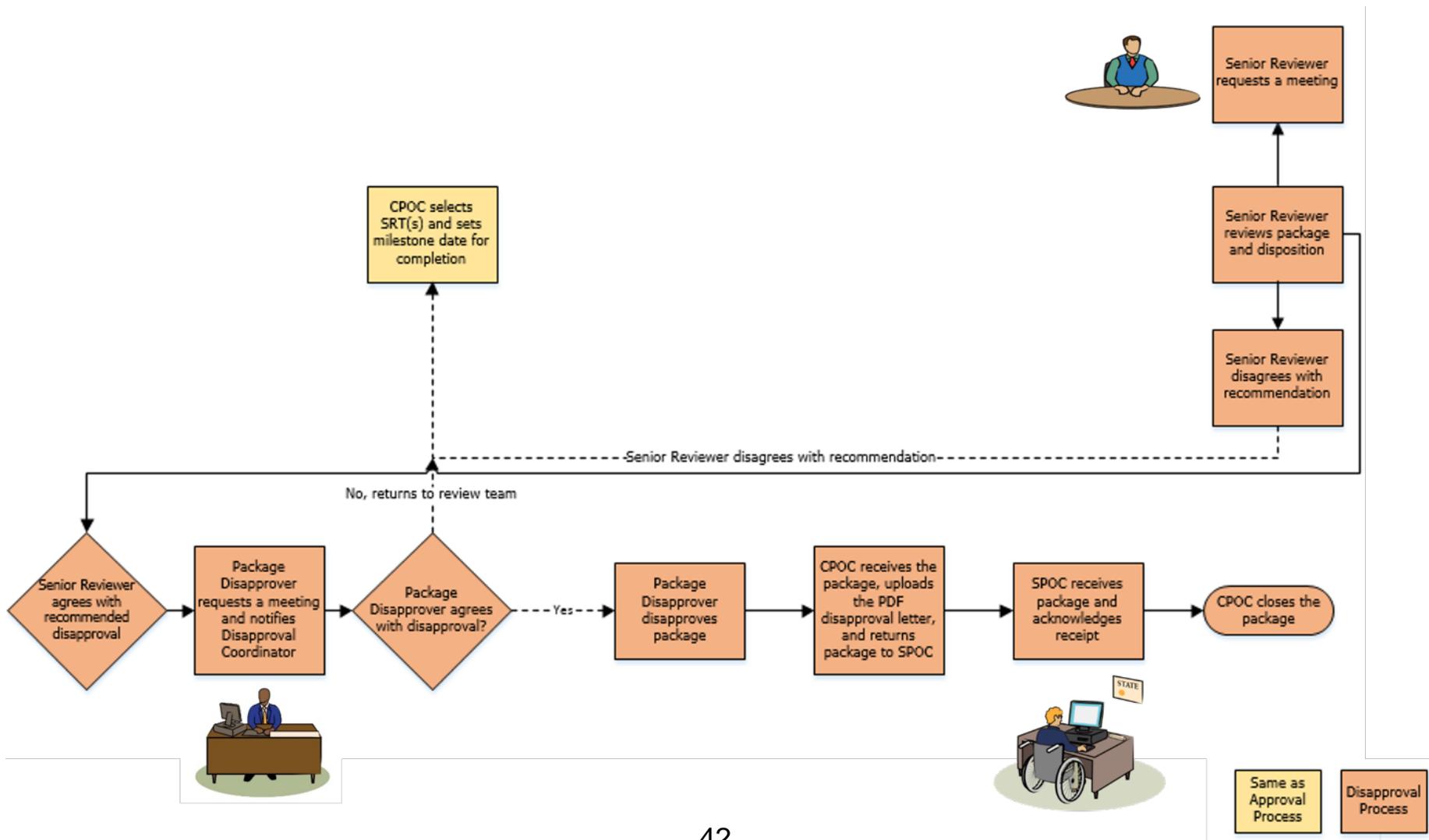
MACPro Reports

Report Name	Description	Available For:
Clock Status Report	View the regulatory clock statuses	All
State Agency Profile Report	Overview of a State's Medicaid Plan including the prior 12 months' submission package history	All
Submission Detail Report	View details on packages by date	All
Submission Statistics Detail Report	View all Submission Packages currently in review	All

MACPro Reports (Cont.)

Report Name	Description	Available For:
Submission Statistics Summary Report	View summary of Submission Packages in a specific review status within a specified date range.	All
Submission Summary Report	Overview of submitted packages by date	All
Generate Workload Report	View the number of Submission Packages assigned to each SRT member, and package count per role as of the report run date.	All

Help Desk/Technical Assistance

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Help Desk and Technical Assistance

◈ For issues related to MACPro <u>access</u> and how to <u>use</u> the MACPro system

  ◆ Contact the *MACPro Help Desk* at

     ◇ **Email:** <u>MACPro_Helpdesk@cms.hhs.gov</u>

     ◇ **Phone:** 301–547–4688

  ◆ Click Request System Help link within MACPro

Help Desk and Technical Assistance (cont.)

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.)

Web Browser	Version necessary to access MACPro	Print to PDF Details
Google Chrome (Optimal Web Browser)	• Google Chrome updates automatically. The most recent version is supported	• Use Print Function to save as PDF
Mozilla Firefox	• Mozilla Firefox updates automatically. The most recent version is supported	• Not supported without additional browser add-ons • Consult your IT/System partners about the add-ons available
Microsoft Internet Explorer	• Version 11 • 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	• Not supported without additional software. • Requires a print-to-PDF program such as Adobe Acrobat

Help Desk and
Technical Assistance (cont.)

Software	Version necessary to access MACPro	Print to PDF Details
Windows 10	• Not applicable. Software does not impact ability to access MACPro	• Use Print Function and select Microsoft Print to PDF
OS X Yosemite	• Not applicable. Software does not impact ability to access MACPro	• Requires a print-to-PDF program such as Preview or Adobe Acrobat

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Additional Resources

- ◈ 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:
    - ◇ https://www.medicaid.gov/state-resource-center/medicaid-and-chip-program-portal/downloads/eidminstructionsmacprousers.pdf
- ◈ Obtain the appropriate access and MACPro Roles needed
  - ◆ Instructions are available to assist with this process at:
    - ◇ https://www.medicaid.gov/state-resource-center/medicaid-and-chip-program-portal/downloads/ird-macprorolesadministration.pdf

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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