MACPro

Medicaid & CHIP Program System

Medicaid and CHIP Program System (MACPro)

Medicaid MAGI Eligibility and Administration

CMS Introductory Training

2017

Agenda

- Introduction to MACPro
- Transition to MACPro
- How Do I Obtain Access to MACPro?
- MACPro Medicaid State Plan CMS User Roles
- MACPro Medicaid State Plan CMS Workflows
- MACPro Medicaid State Plan State User Roles
- MACPro Medicaid State Plan State Workflows
- Help Desk and Technical Assistance
- Next Steps
- Questions?

Introduction to MACPro

- **Introduction to MACPro**
- Transition to MACPro
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What is MACPro?

- A web-based system that allows CMS and states to collaborate more effectively online in support of Medicaid and CHIP initiatives

- Current MACPro functionality includes:
  - Medicaid Health Home State Plan Amendments, and
  - Quality Measures Reporting

- Will eventually replace the Medicaid Model Data Lab (MMDL) and paper-based process of submitting and reviewing state plan amendments

MACPro
Medicaid & CHIP Program System

Key Features

- **MACPro Features:**
  - SPA templates designed with structured data choices and built-in logic
  - Tasks
  - Automated Notifications
- **System Functionalities:**
  - Submission Packages
  - Review Tool
  - Analyst Notes
  - Correspondence Log
  - Clarification
  - Request Addition Information (RAI)
  - Approval Notice

Implementation of MACPro

- Ensures consistency across states through simplified SPA templates
- Reduces unnecessary delay and enhances efficiency through automated workflows and built-in logic
- Improves transparency by allowing states to check the status of submissions
- Establishes clear communication processes that are documented and maintained in one central location
- Supports data-driven decision making for Medicaid and CHIP programs
- Consolidates multiple systems to allow for standardized data definitions and work processes across programs and policies

Future of MACPro

- When fully implemented, MACPro will allow CMS, along with state partners and researchers, to have a single point of entry to access various program data applications including, but not limited to:
  - Adult and Child Core Quality Measures Reporting
  - State Plan Amendments (SPA)
  - CHIP Program data
  - RACs (Recovery Audit Contractors) Form
  - Medicaid Payment Suspension Reporting
  - 1937 Benchmarks
  - 1115 Demonstrations
  - Community First Choice SPAs
  - Balancing Incentive Payments

Transition to MACPro

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Transition to MACPro

- **MACPro will include the following state plan authorities:**
  - 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
- Soon, all new SPA actions should be made in MACPro and MMDL will no longer accept new SPA submissions
- Upon go-live, draft SPAs will no longer be accessible in MMDL
- 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

Transition to MACPro

Training today will cover:

- How to obtain access to MACPro
- MACPro user roles
- An overview of the state submission and CMS review process

Future trainings will cover:

- Administrative user roles including approval authority for other users to access MACPro
- Creating and submitting MAGI Eligibility or Administration SPAs within MACPro (in-system demonstration)
- CMS review and approval process for SPA submissions (in-system demonstration)

How Do I Obtain Access to MACPro?

- Introduction to MACPro
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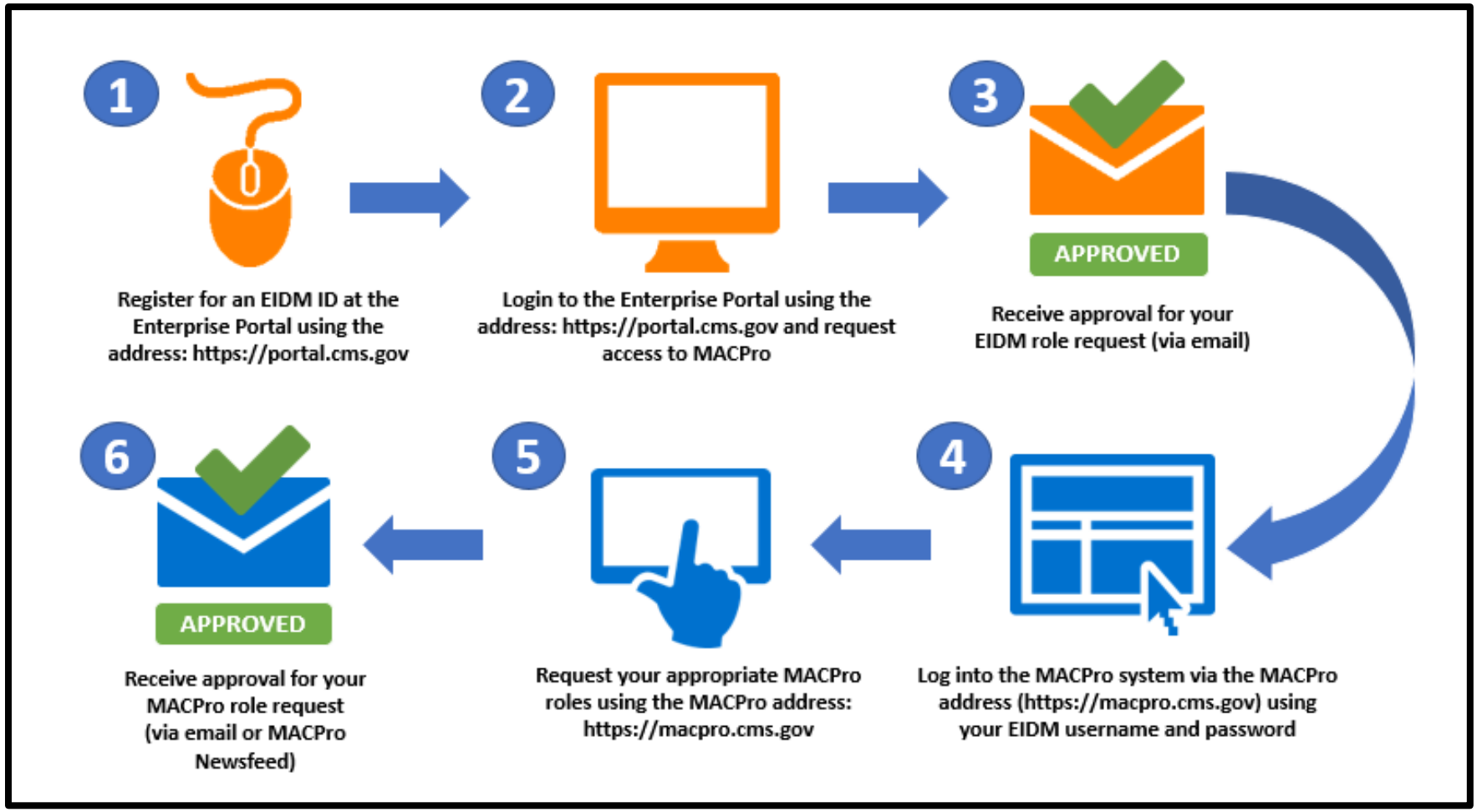
What Will I Learn?

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

How to Obtain MACPro Access



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 one EIDM ID, even if accessing multiple CMS applications through the EIDM Portal.

How to Obtain MACPro Access

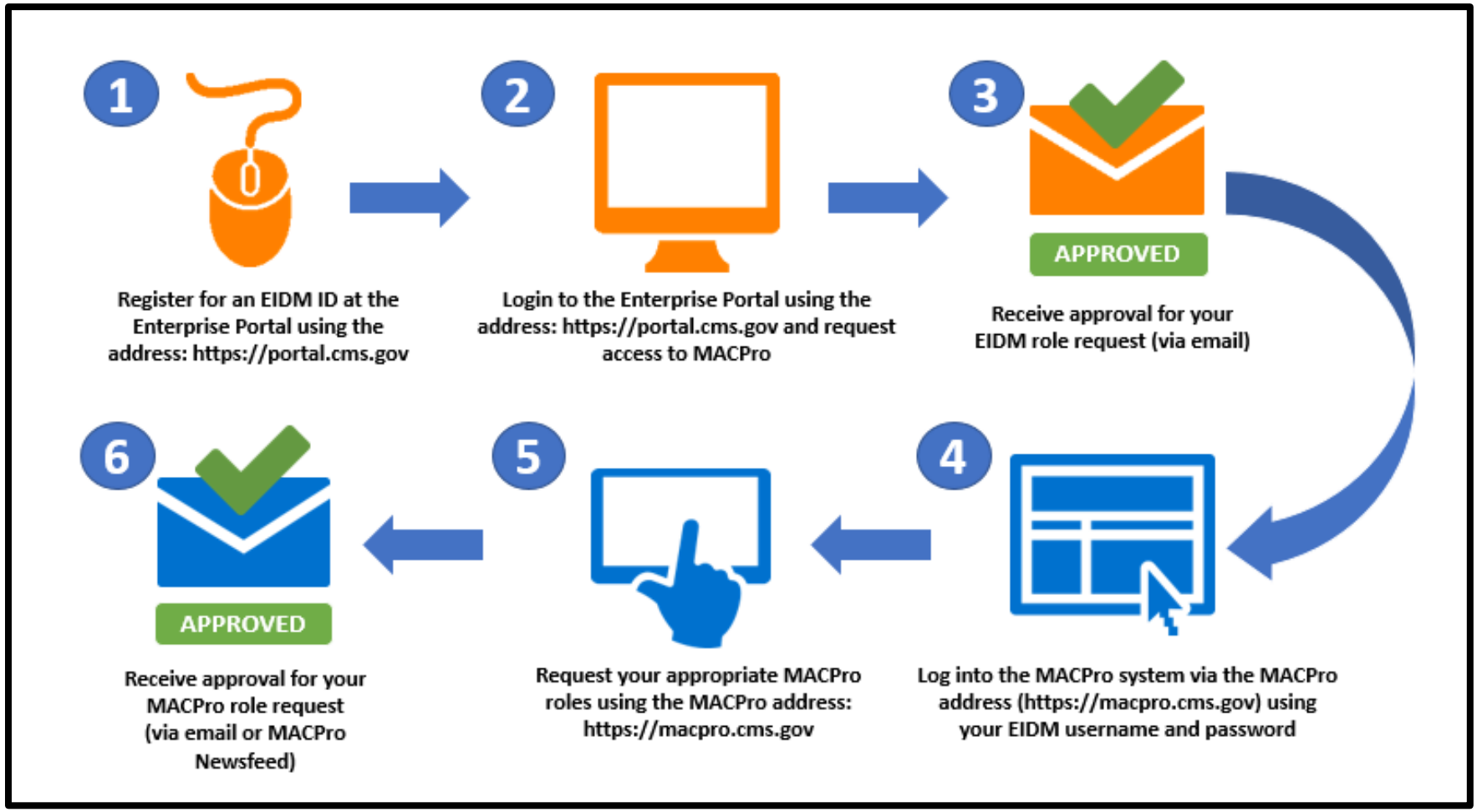
What is a MACPro role?

- 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

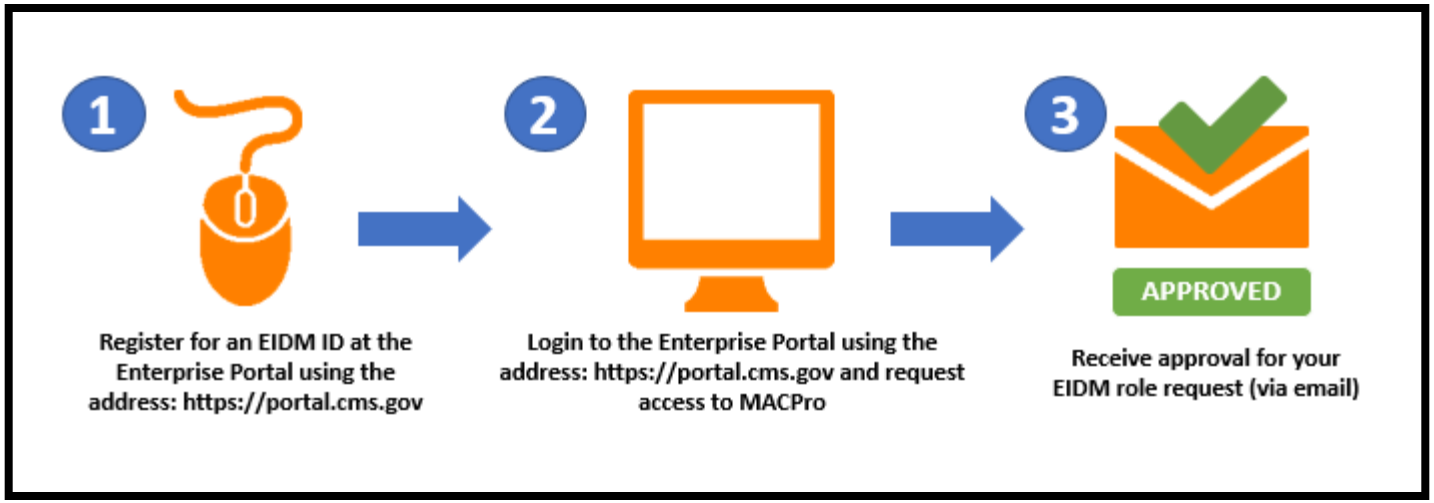
When do I obtain my MACPro role?

- You will receive an email from MACPro@cms.hhs.gov notifying you when it's time to request your MACPro role(s) for the Medicaid Eligibility and Administration SPA authorities including detailed instructions

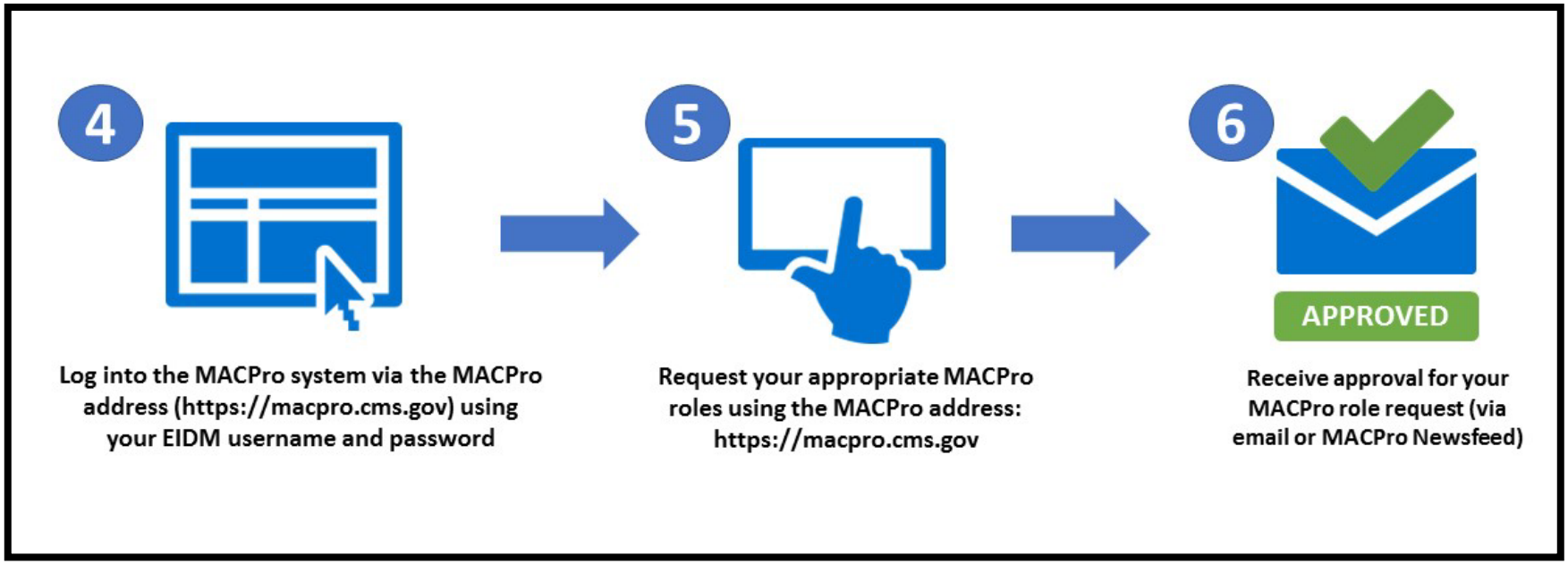
How to Obtain MACPro Access



How to Obtain MACPro Access (Steps 1 to 3 – EIDM)



How to Obtain MACPro Access (Steps 4 to 6 – MACPro)



- You will receive an email from MACPro@cms.hhs.gov notifying you when it's time to request your MACPro role(s) for the Medicaid Eligibility and Administration SPA authorities including detailed instructions

How to Obtain MACPro Access

Scenario 1: You are not an existing MACPro user

- **1a**: You do not have an EIDM ID and do not have MACPro access
  - Begin with Step 1 (registering for an EIDM ID) and continue through to Step 6 (receiving approval for roles in MACPro)

- **1b**: You have an existing EIDM ID, without approved MACPro access
  - Start with Step 2 (requesting MACPro access through EIDM) and continue through to Step 6 (receiving approval for roles in MACPro)

How to Obtain MACPro Access

Scenario 2: You are an EXISTING MACPro user

- You are an existing MACPro user with an EIDM ID and approved MACPro access
  - Begin at Step 5 (request your appropriate MACPro user role) and continue to Step 6 (receiving approval for your roles in MACPro)

MACPro Medicaid State Plan CMS User Roles

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What Will I Learn?

- The CMS Medicaid State Plan MACPro roles available
- The functions of the CMS Medicaid State Plan MACPro roles

MACPro Medicaid State Plan 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 (Eligibility, Administration, and Health Homes) CMS roles differ from MACPro Quality Measure CMS Roles

MACPro Medicaid State Plan
CMS User Roles

- **CMS Point of Contact (CPOC)**
- **CMS Submission Review Team (SRT)**
- **CMS Senior Reviewer**
- **CMS Package Approver (PA)**
- **CMS Disapproval Coordinator**
- **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.*
- *Unless noted otherwise, users can hold multiple roles.*

MACPro Medicaid State Plan
CMS User Role Descriptions

Role	Actions	Details
CMS System Administrator (CSA)*	• Reviews and approves/denies user role 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	• Authority specific

** Individuals filling this role must attend MACPro Administrative Training.*

MACPro Medicaid State Plan
CMS User Role Descriptions

Role	Actions	Details
CMS Point of Contact (CPOC)	• Oversees the review process for draft and official submissions • Assigns members to the submission review team • Sets and manages internal milestones and reminders for reviewers • Compiles review team questions and comments into a Clarification (informal) request for the state • Generates a Request for Additional Information (RAI), if needed • Manages communications with state • Recommends disposition (approval or disapproval) on behalf of the review team • Develops state-specific approval notice • Documents and reviews correspondence log entries	• Cannot be Package Approver or Disapprover on the same package *Similar to RO Lead SPA Analyst*

MACPro Medicaid State Plan CMS User Role Descriptions

Role	Actions	Details
CMS Submission Review Team (SRT)	• Reviews draft and official submissions • Develops comments/questions on the submission • Collaborates with the CPOC on submission package clarifications and RAI questions (if needed) • Provides recommendation for disposition of the submission	• Authority specific • Cannot be Package Approver or Disapprover on the same package *Similar to CO Subject Matter Experts and Technical Directors*
CMS Senior Reviewer	• Monitors submission review through system reports • Reviews SRT comments, submission package clarifications and RAI questions • Signs-off on recommendations for approval • Reviews and provides feedback on disapproval packages	• Authority specific • Cannot be Package Disapprover on the same package *Similar to CO Technical Director, Branch Manager, and/or Associate Regional Administrator*

MACPro Medicaid State Plan
CMS User Role Descriptions

Role	Actions	Details
CMS Package Approver	• Evaluates recommendation of approval • Approves official Medicaid State Plan submissions	• Cannot be the CPOC or SRT on the same package *Central Office role for P1 and P2 SPAs; Regional Office role for P3 SPAs*
CMS Disapproval Coordinator	• Assembles disapproval package • Coordinates movement of the official submission package through CMS senior review and clearance process for recommended disapprovals	• Cannot request to be a CSA
CMS Package Disapprover	• Evaluates recommendation of disapproval • Disapproves official Medicaid State Plan submissions	• Cannot be CPOC, SRT, or Senior Reviewer on the same package

MACPro Medicaid State Plan
CMS User Role Descriptions

Role	Actions	Details
CMS Subscriber	• Subscribes to particular states or subject matter of interest • Views read-only versions of state submission packages	• Authority specific
CMS Report Admin	• Views system reports • Views read-only versions of state submission packages	• Authority specific

MACPro Medicaid State Plan CMS Workflows

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What Will I Learn?

- CMS User Functionalities
- CMS process for reviewing SPA submission packages in MACPro
- The various MACPro roles involved in the approval and disapproval process

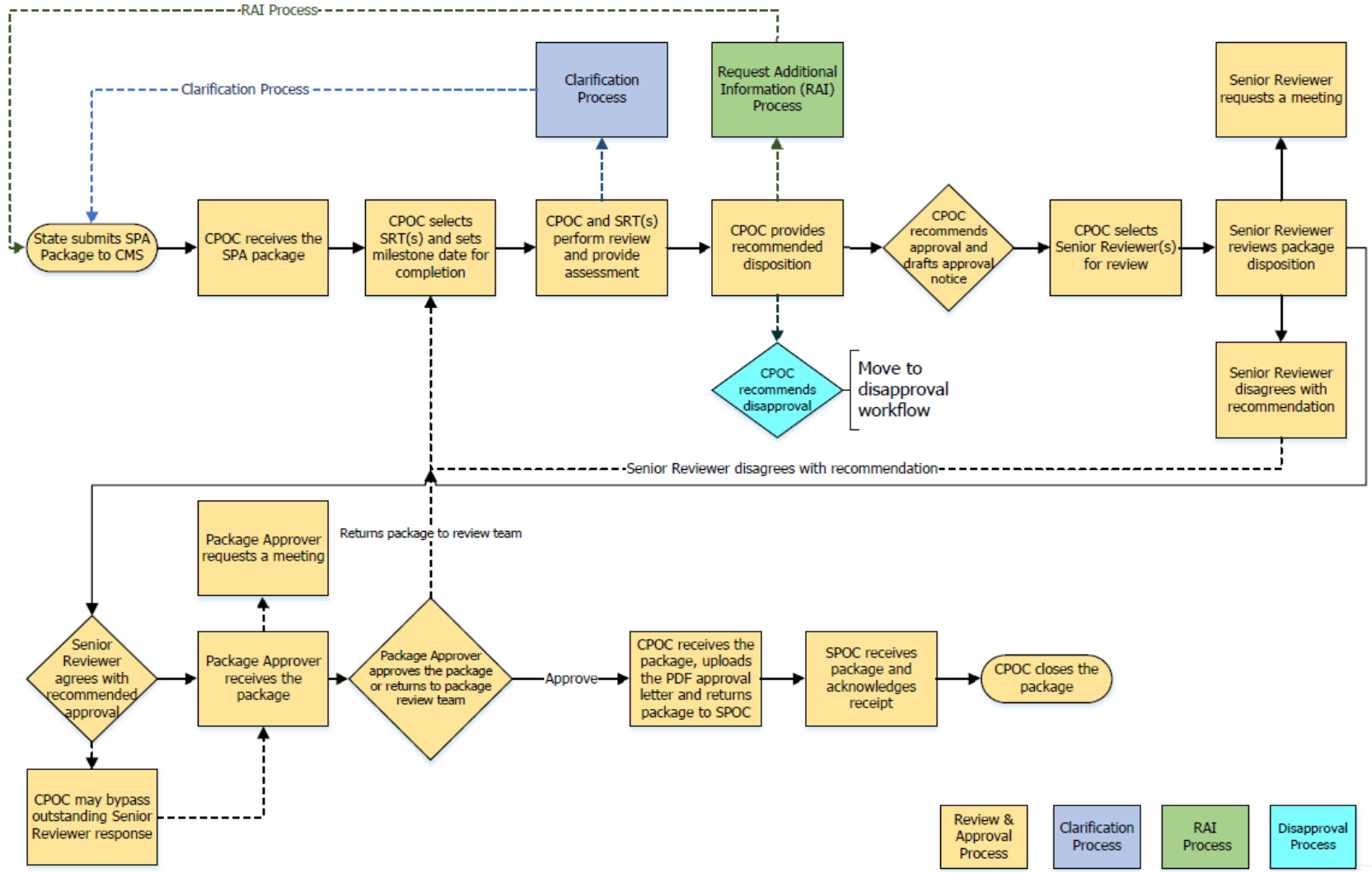
CMS User Functionalities

- **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 Approval Workflow



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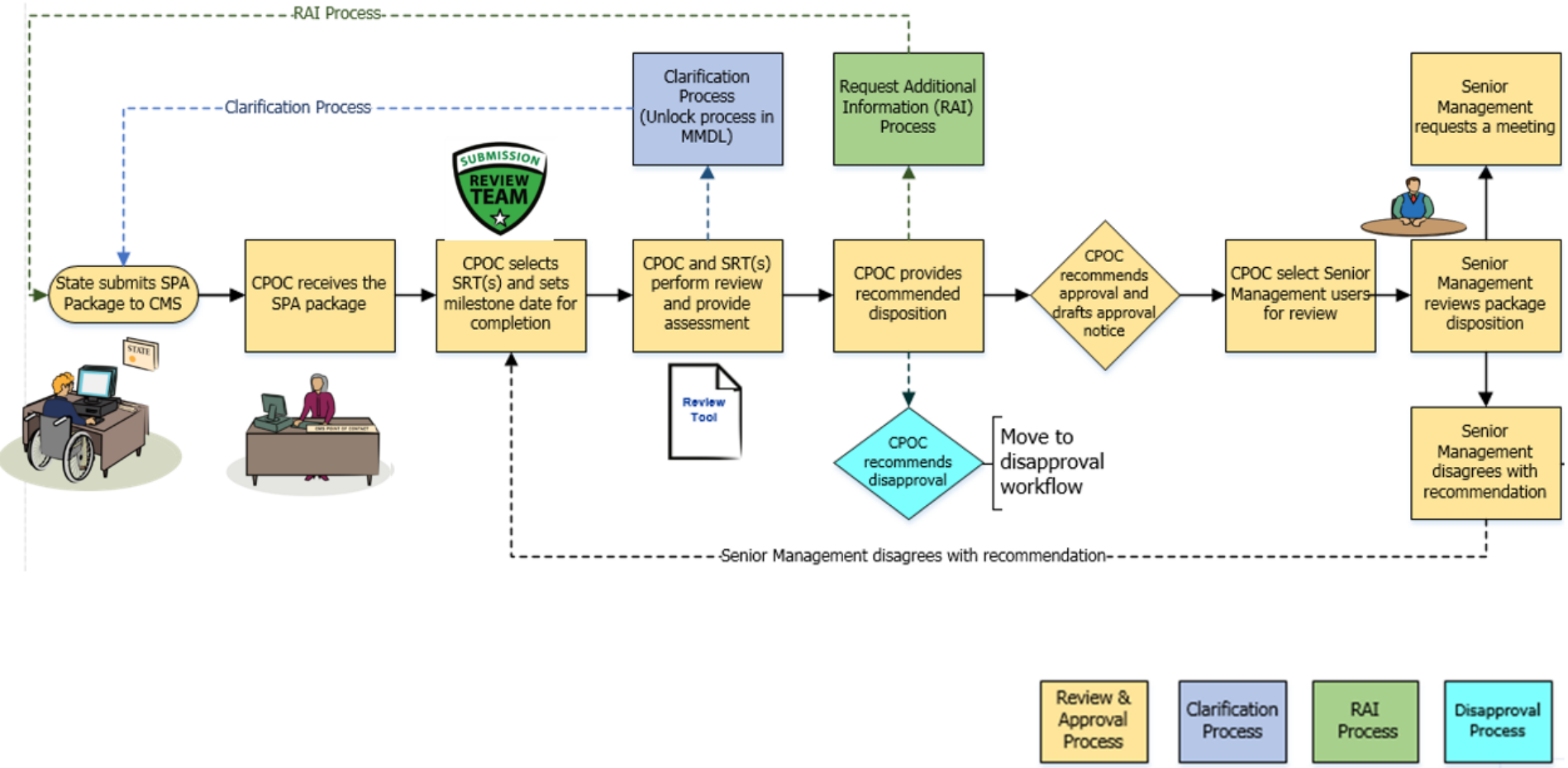

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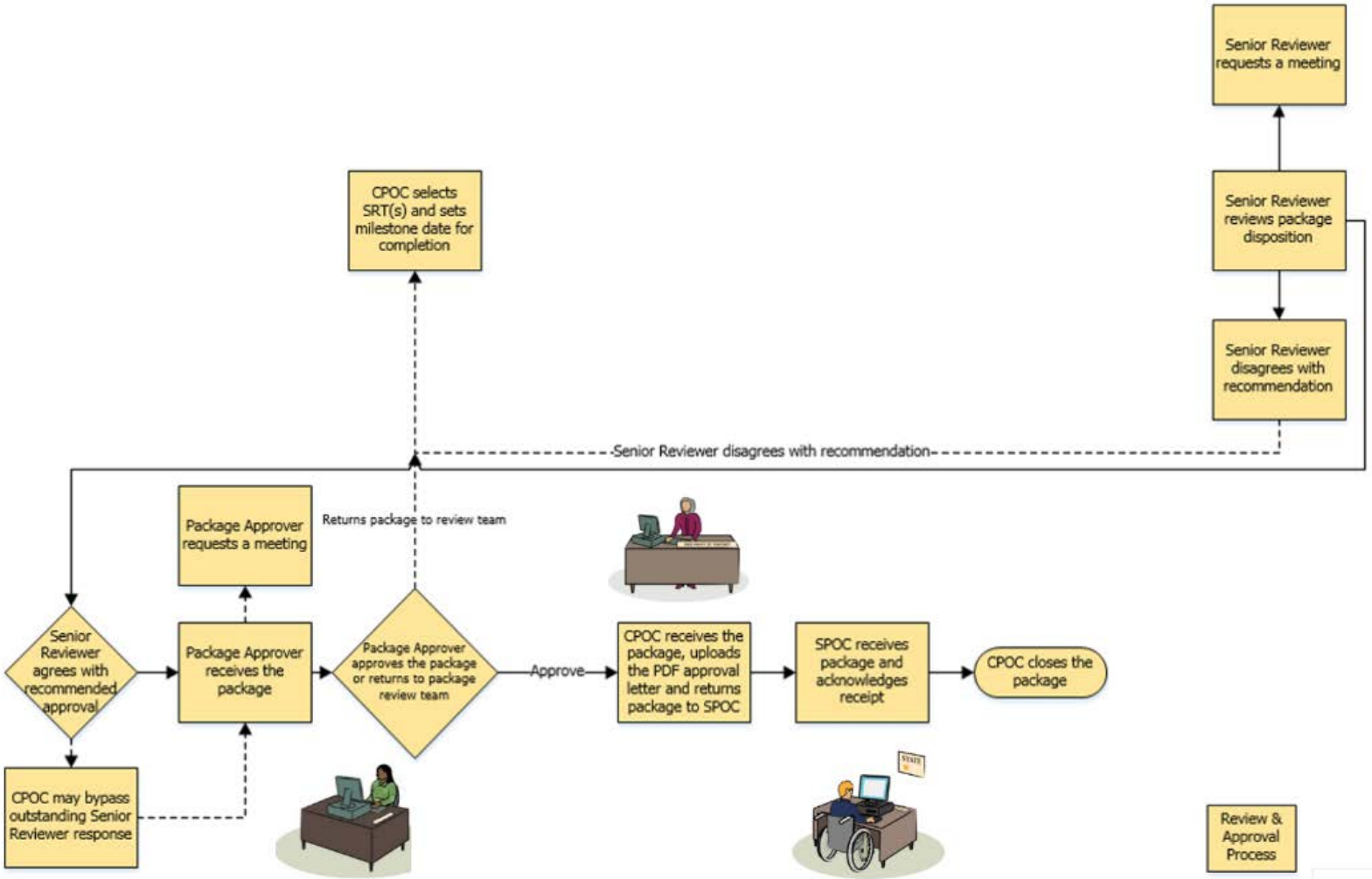

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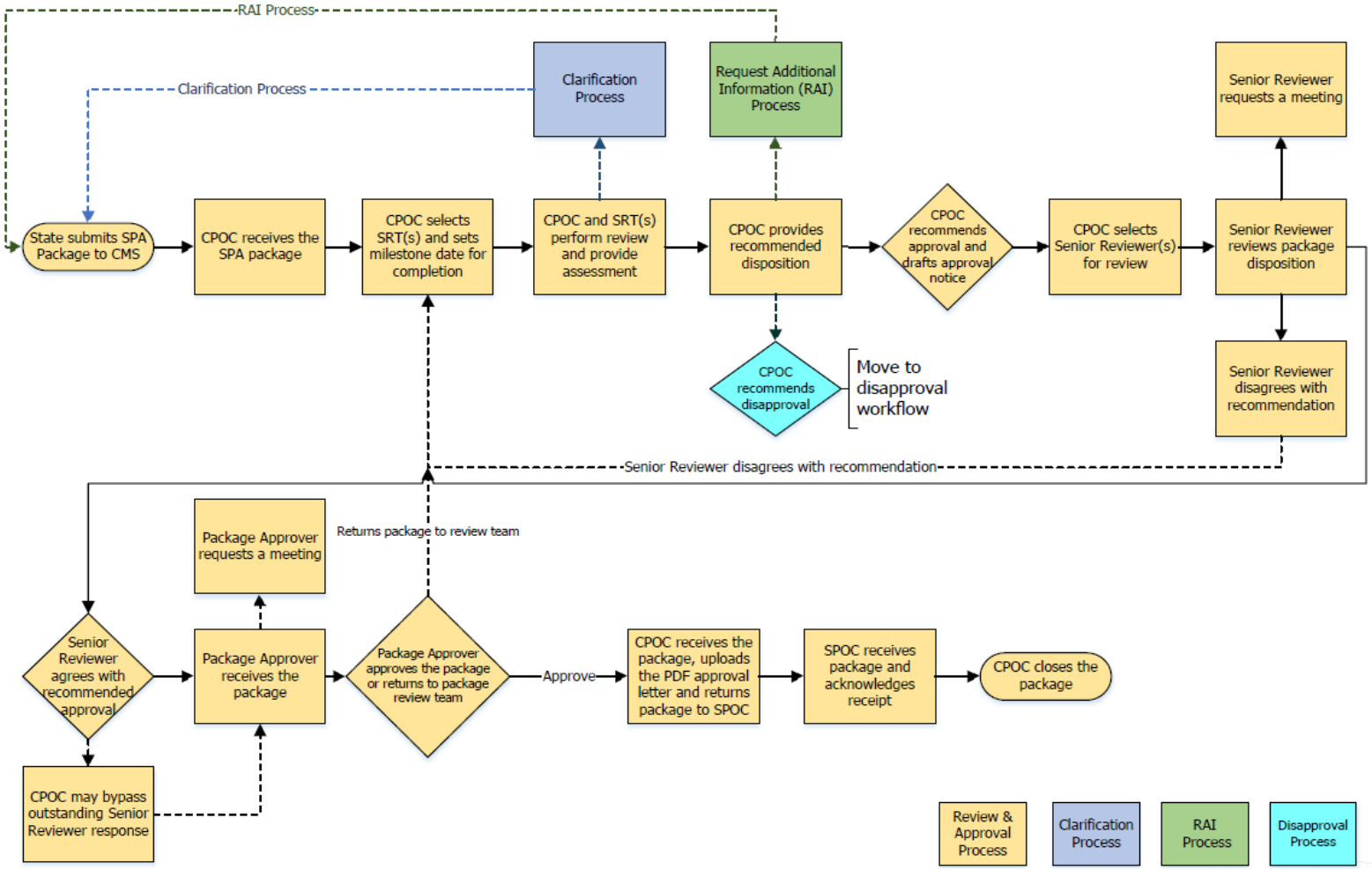


Roadmap to Clarification

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

Clarification Process: Detailed View

CMS Point of Contact collects question(s) from the review team and compiles them in the correspondence log related to the clarification request

CMS Point of Contact initiates clarification, which returns submission package to the state

State Point of Contact receives an email that there is a task to respond to a clarification request in their task list

State Point of Contact reads the message(s) from the CMS Point of Contact in the correspondence log

Does the package need to be updated?

YES

Respond to CMS Point of Contact in correspondence log and modify submission package

NO

Respond to CMS Point of Contact in the correspondence log; do not modify submission package

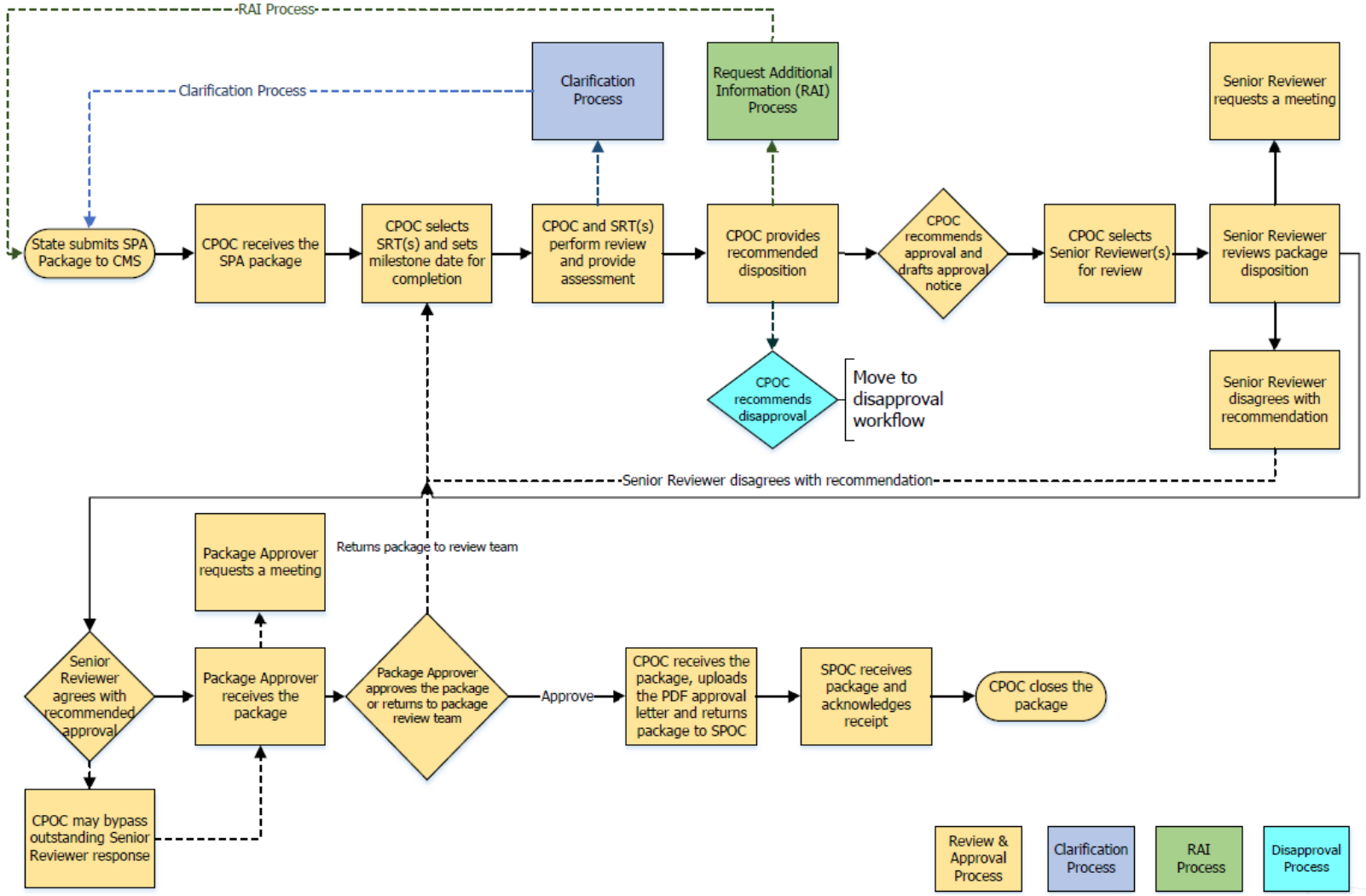
Return Submission Package to CMS for continued review

CMS Clarification

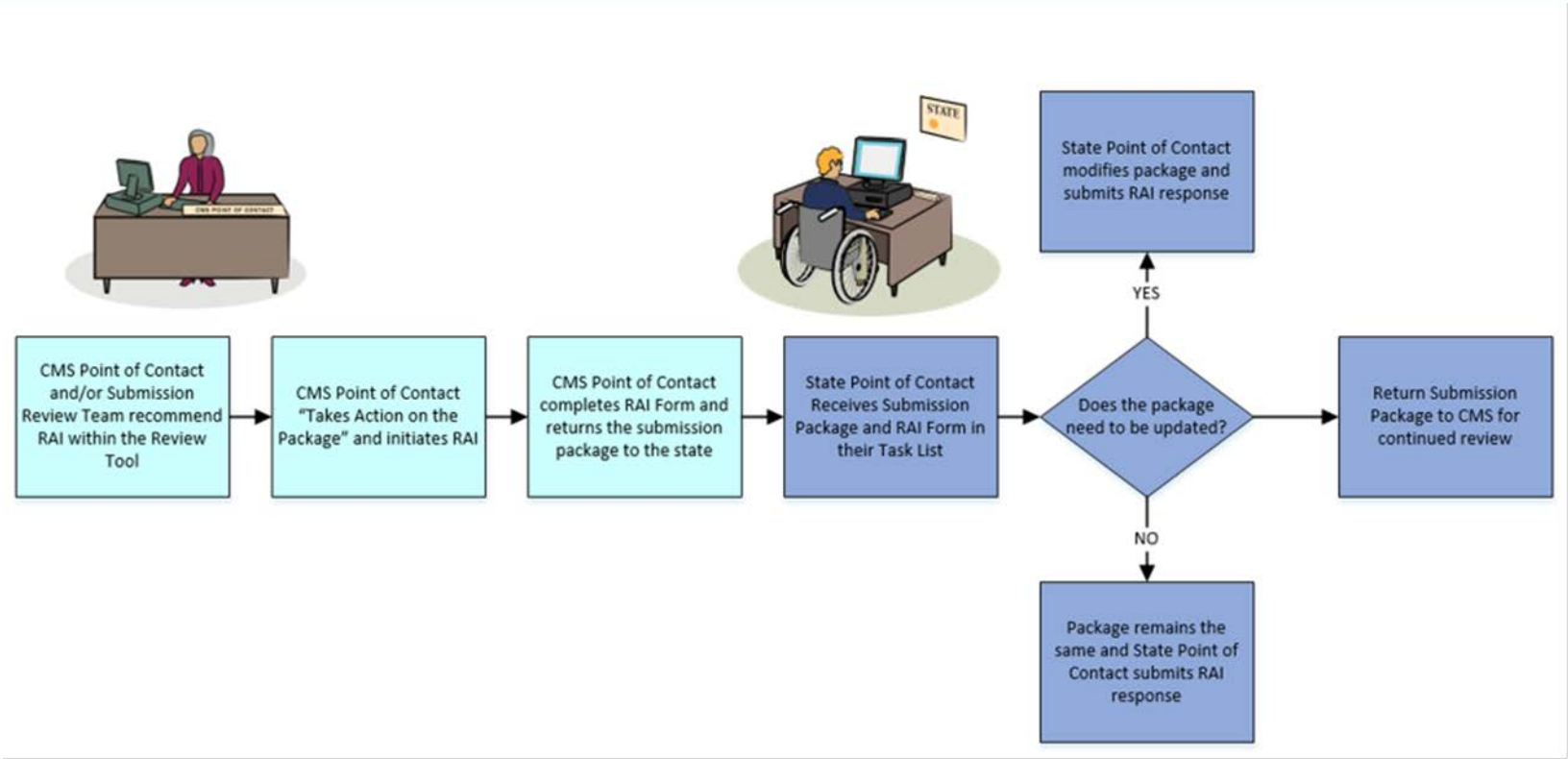
State Clarification

- Clarification process does *not* stop the 90 day clock

Official SPA Submission: CMS Approval Workflow

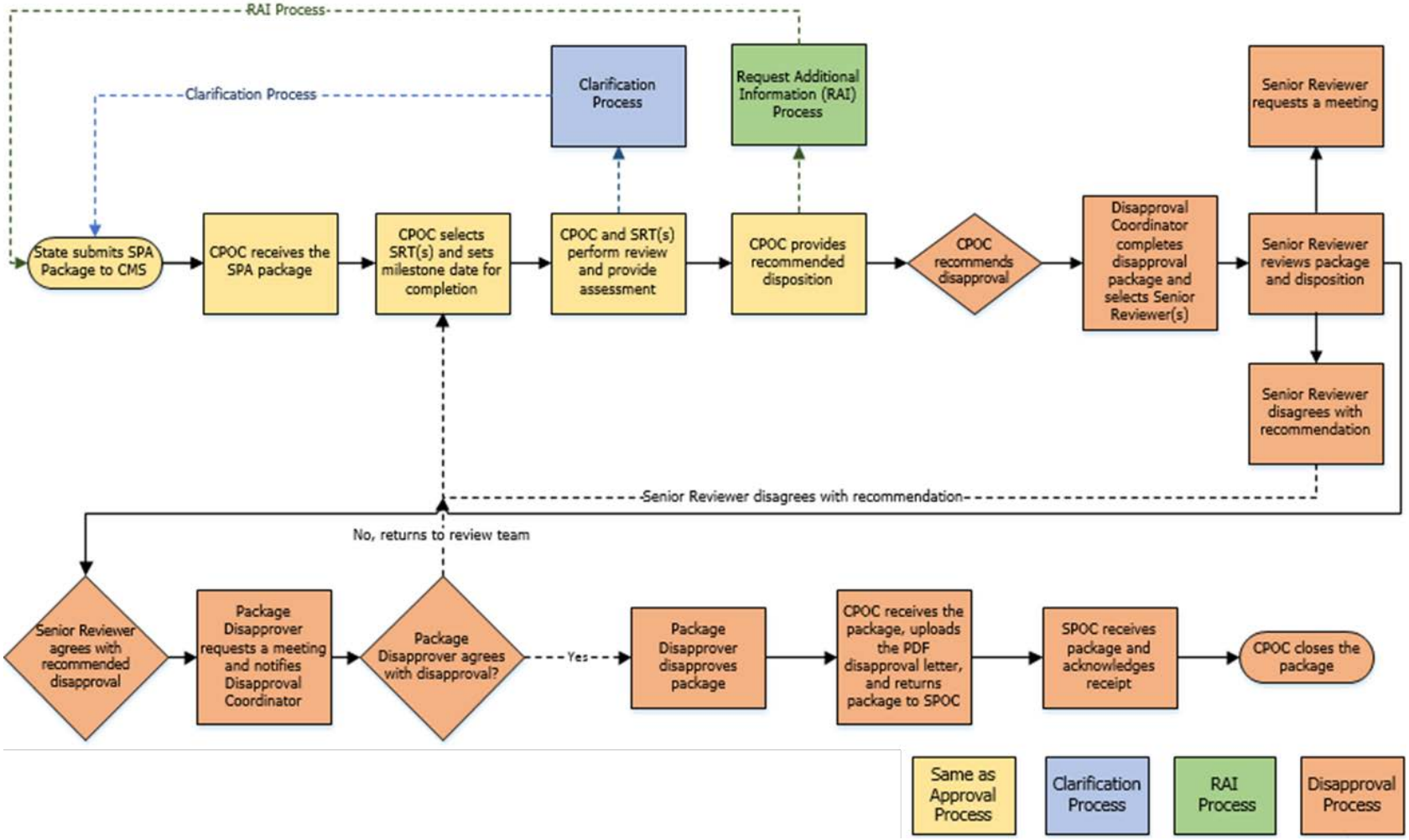


RAI Process: Detailed View



- RAI process *stops* the 90 day clock

Official SPA Submission: CMS Disapproval Workflow



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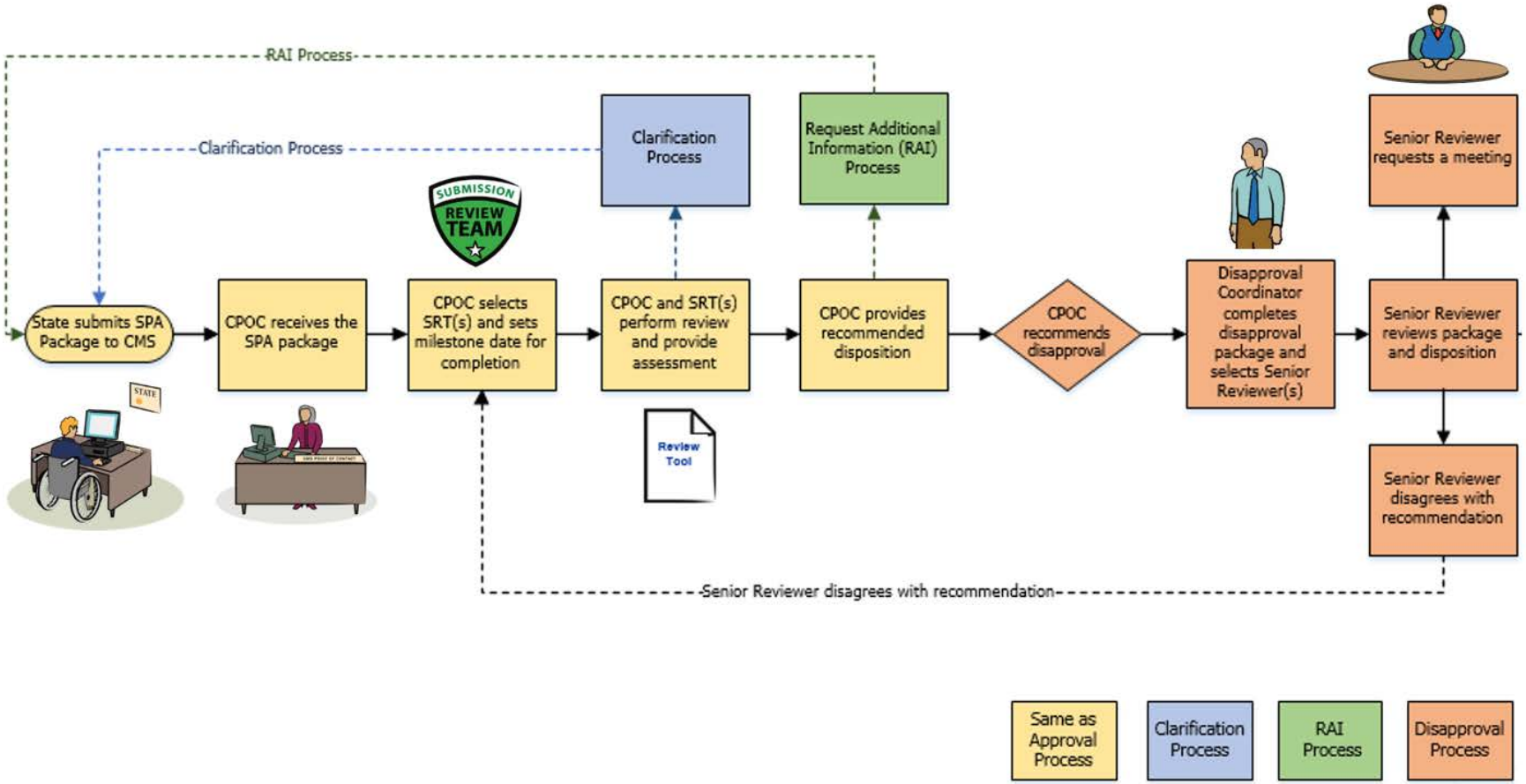

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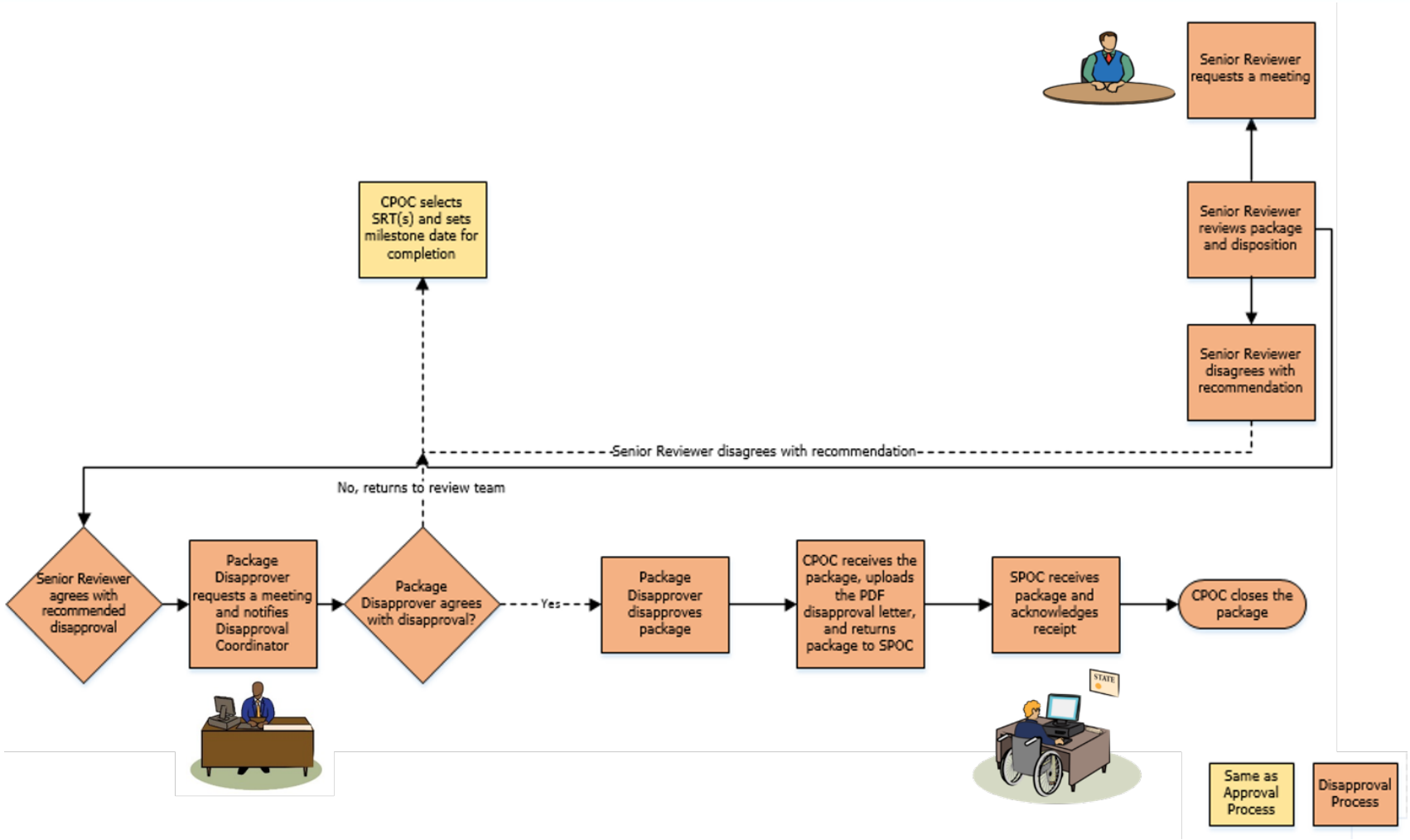

MACPro Medicaid State Plan State User Roles

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What Will I Learn?

- Who is involved in the state submission process
- The functions of the State Medicaid State Plan MACPro roles

MACPro Medicaid State Plan
State User Roles

- State Editor (SE)
- State Point of Contact (SPOC)
- State Director
- State System Administrator (SSA)*

Roles with an asterisk (*) indicate that the role has administrative functions and must attend the MACPro administrative training.

MACPro Medicaid State Plan State User Role Descriptions

Role	Actions
State Editor	• Creates content for new SPA submission packages • Updates draft SPA submission packages based on feedback from state leadership • Converts draft SPA submission packages to official SPA submission packages • Collaborates with the State Point of Contact (SPOC) on SPA submission package clarifications and request for additional information (RAI) responses (if needed) *Similar to State Medicaid Agency (SMA) personnel*

MACPro Medicaid State Plan State User Role Descriptions

Role	Actions
State Point of Contact (SPOC)	• Submits draft packages and certified official SPA submission packages to CMS • Serves as the primary contact with CMS for specific SPA submissions, including Clarification requests and RAI • Documents and reviews Correspondence Log entries • Returns submission packages to State Editors when revisions or additional information are needed • Reviews and updates submission package content • Submits SPA RAI responses to CMS *Similar to the state's SPA coordinator.*

This role is authority specific.

MACPro Medicaid State Plan
State User Role Descriptions

Role	Actions
State Director	• Reviews state-prepared SPA submission packages • Approves (certifies) SPA packages for submission to CMS *Similar to State Medicaid Director*
State System Administrator (SSA)	• Reviews and approves/denies state user role requests • Views state system SPA reports • Maintains State Profile

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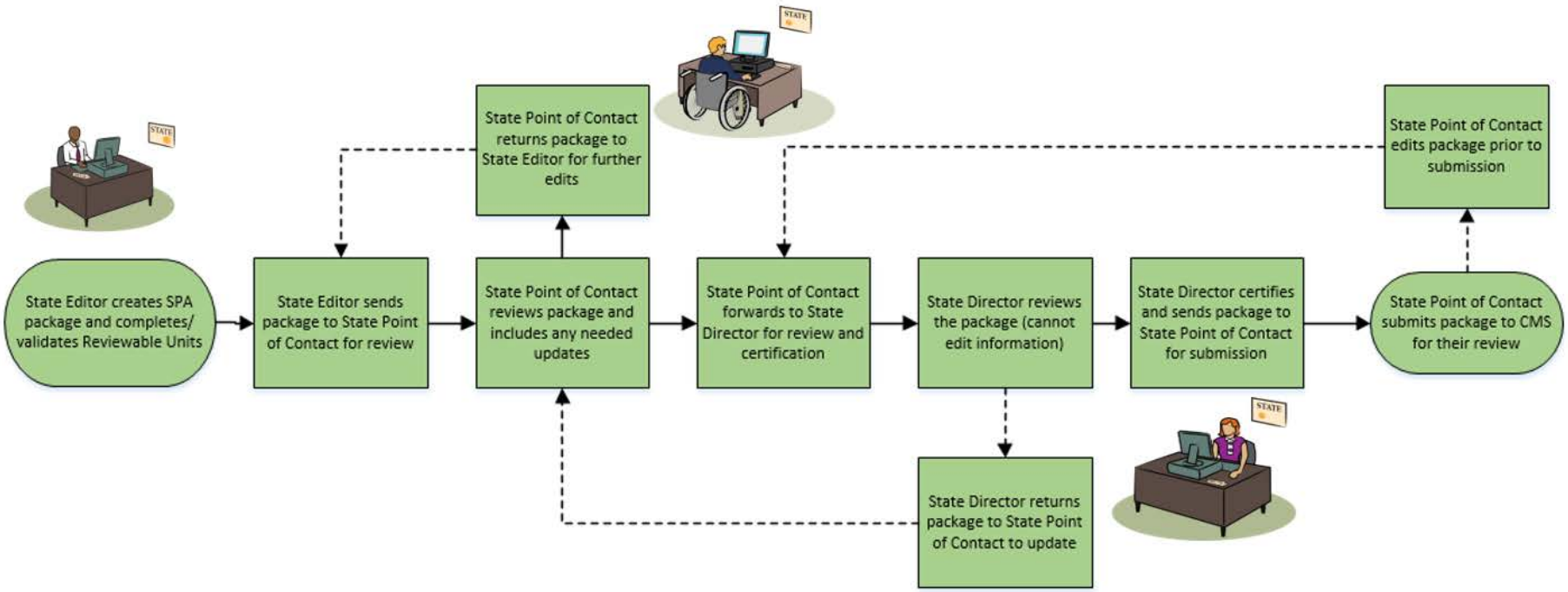
What Will I Learn?

- How a state creates and submits a SPA
- Who is involved in the state SPA submission process

Official SPA Submission: State Workflow



Help Desk and Technical Assistance

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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
    - **Hours:** 9:00AM – 7:00 PM EST
  - 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

Next Steps

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Next Steps

- 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

Next Steps

- 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

Next Steps

- MACPro Administrative Training
  - Users who hold or will be requesting the **CMS System Administrator** and **CMS Role Approver** MACPro user roles will be invited to attend an upcoming training session. Two sessions will be offered:
    - Option 1: 8/10/2017
    - Option 2: 8/15/2017
  - Please **obtain your EIDM ID and EIDM Role** for MACPro **prior** to attending the training session, as we will provide a live-provisioning session to assist you in obtaining your MACPro user role during this session

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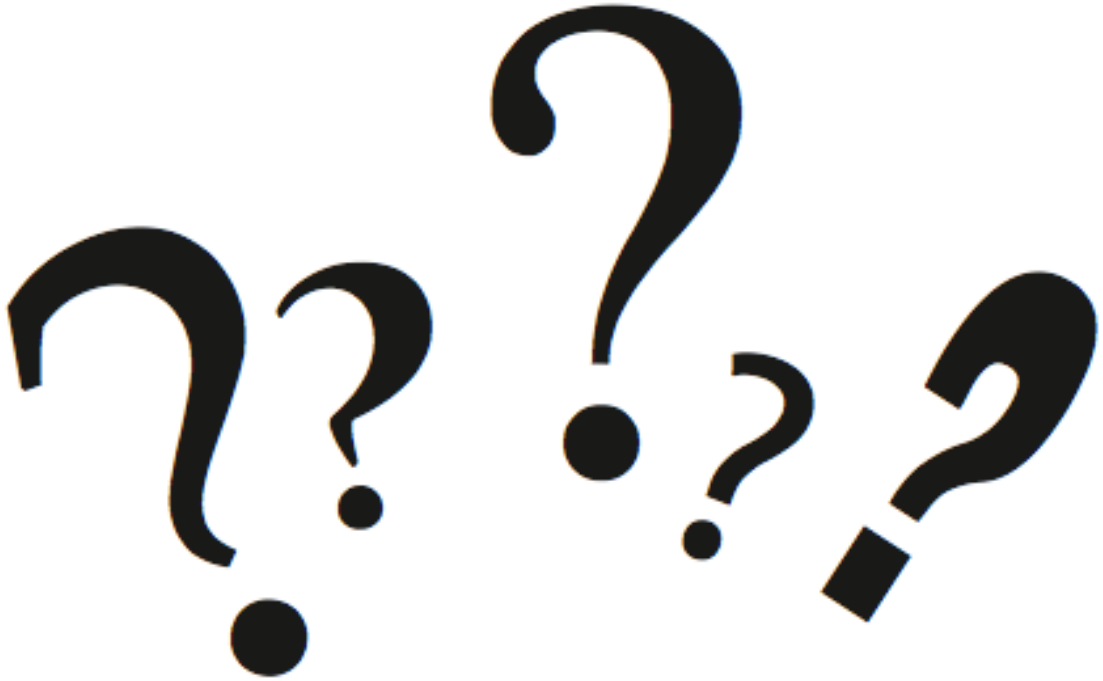
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