



SDIS

State User Documentation and Training

Data.Medicaid.gov



August 9, 2021



Agenda

- [Overview](#)
- Creating your Account
- [Login](#)
 - [Reset Password](#)
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 - [Report Screens](#)
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Overview

A dark blue diagonal gradient bar that starts from the bottom left corner and extends towards the top right corner, covering the lower half of the slide.

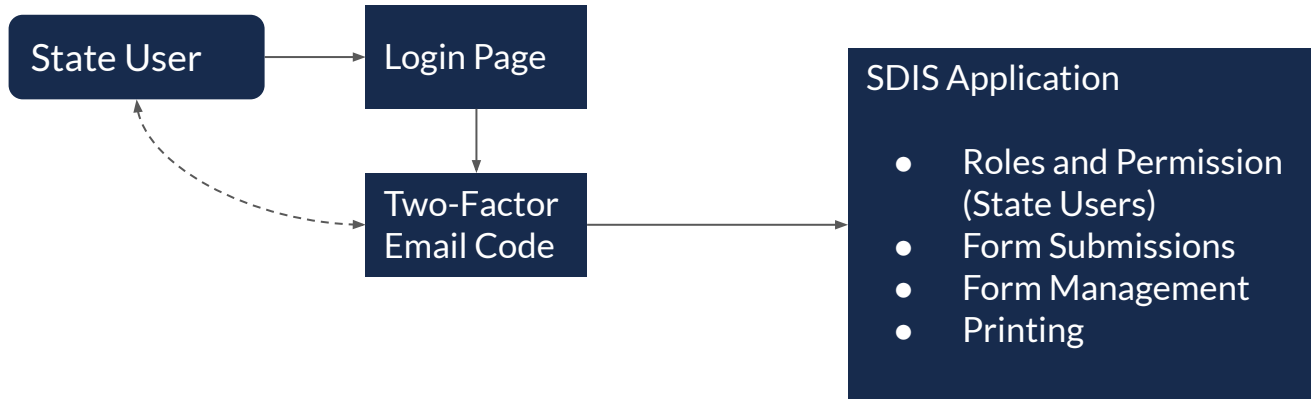


Key Information

- The submission form is grouped into sections that users can quickly navigate
- State Reporters can save reports with errors for later correction
- The previous month report data is displayed to provide context when completing the new preliminary and updated reports
- Preliminary reports must be completed before an updated report can be started
- Data is pre-populated from preliminary reports for Call Center, Footnotes and Data Limitations
- Preliminary and updated reports are created automatically at the start of every month
- State users will receive an email from two-factor authentication with a four-digit code to securely complete logging in

State User Permissions

- State Reporter:
 - Ability to fill out, update and publish state forms
 - Authentication
 - Drupal Two Factor Authentication



Creating your Account

A dark blue diagonal shape that starts from the bottom left corner and extends towards the top right corner, covering the lower half of the page.

First time Login

Login Email

- An email will be sent with instructions on how to login for the first time
- You will be asked to create your password for logging in the future

Example Email

An administrator created an account for you at Performance Indicator Reporting

Performance Indicator Reporting <no-reply@sdismedicaid.prod.acquia-sites.com>

to omar.abed+statetest ▾

omar.abedstatetest,

A site administrator at Performance Indicator Reporting has created an account for you. You may now log in by clicking this link or copying and pasting it into your browser:

<https://imp-edit.sdis.medicaid.gov/user/reset/1231/1628535089/6MJp0Kc9Ei3k7AU7ZndT5ie3F7YIPIwE6LfC3zPUHlo>

This link can only be used once to log in and will lead you to a page where you can set your password.

After setting your password, you will be able to log in at <https://imp-edit.sdis.medicaid.gov/user> in the future using:

username: omar.abedstatetest

password: Your password

-- Performance Indicator Reporting team

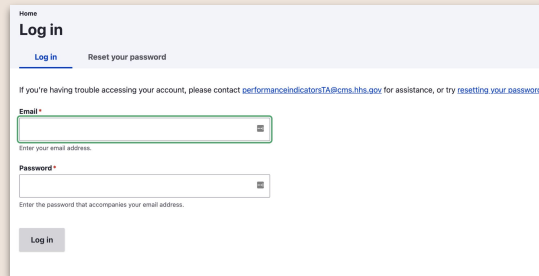
How to Login and Reset Your Password

State Reporter Testing Login Steps

1. Click the link below to view the login screen

<https://edit.sdis.medicaid.gov/user/login>

2. Enter your email and password



The screenshot shows a web page titled "Home" with a "Log in" header. Below the header are two links: "Log in" and "Reset your password". A message states: "If you're having trouble accessing your account, please contact performanceindicator@cms.hhs.gov for assistance, or try [resetting your password](#)." There are two input fields: "Email*" with the placeholder "Enter your email address." and "Password*" with the placeholder "Enter the password that accompanies your email address." A "Log in" button is located at the bottom.

*Your account information was emailed to you.

3. Check your email for your SDIS One-Time Login Code

Email Authentication

A one-time login code has been emailed to you. Enter the code below to complete the login.

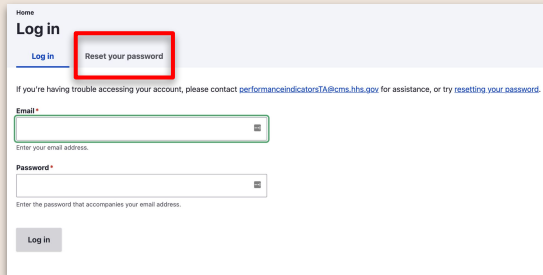
Login Code *

Verify

Login

Reset your password

1. On the login screen click the Reset your password link



Home
Login

[Log in](#) [Reset your password](#)

If you're having trouble accessing your account, please contact performanceindicatorsTA@cms.hhs.gov for assistance, or try [resetting your password](#).

Email*

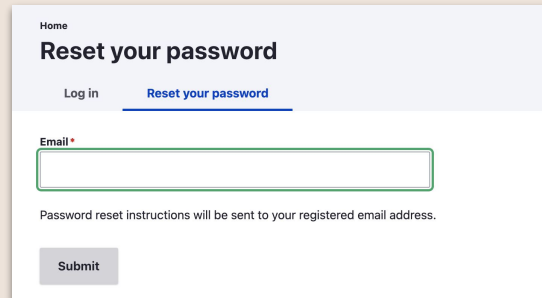
Enter your email address.

Password*

Enter the password that accompanies your email address.

[Log in](#)

2. Enter your email and password



Home
Reset your password

[Log in](#) [Reset your password](#)

Email*

Password reset instructions will be sent to your registered email address.

[Submit](#)

3. Check your email

Follow the instructions will be sent to your email address on steps to reset your password

State Reports

A dark blue, solid-colored shape that starts as a thin line at the bottom left and expands diagonally upwards to the right, filling the bottom right portion of the page.

State Reporter SDIS Main Screen

- State Reporters can start or edit reports
- Reports are organized by year and month
- State Reporters can filter to find reports by year, month, submission type and submission status
- When a report is started and the user returns to the home screen, there is an option to review and submit or edit the form

✓ **Status message**
Code was successfully authenticated.

Year: All years | Month: All months | Submission Type: -Any- | Submission Status: -Any- | **Apply**

2021 reports

Month	Report Type	Last Saved	Submission Status	Operations links
June	Preliminary	--	--	Submit updated report
	Updated	--	--	Start Report
May	Preliminary	--	--	Start Report
	Updated	--	--	Start Report
April	Preliminary	05/06/2021 - 13:16	05/06/2021 - 13:16 ✓	Edit

Month	Report Type	Last Saved	Submission Status	Operations links
May	Updated	--	--	Start Report
	Preliminary	06/23/2021 - 19:46	--	Review and Submit Edit

State Reporter Filtering Reports

→ State Reporters can filter to find reports

- ◆ Year
 - 2013 - Current year
- ◆ Month
- ◆ Submission Type
 - Preliminary
 - Updated
- ◆ Submission Status
 - Submitted
 - Not Submitted

✓ **Status message**
Code was successfully authenticated.

Year: All years ▾ Month: All months ▾ Submission Type: --Any-- ▾ Submission Status: --Any-- ▾ [Apply](#)

2021 reports

Month	Report Type	Last Saved	Submission Status	Operations links
June	Preliminary	--	--	Submit updated report
	Updated	--	--	Start Report
May	Preliminary	--	--	Start Report
	Updated	--	--	Start Report
April	Preliminary	05/06/2021 - 13:16	✓ 05/06/2021 - 13:16	Edit
	Updated	--	--	Start Report

STATE REPORTS

Reports

- State use is guided to complete preliminary report before starting the updated report
- Tab navigation allows users to easily switch between reports

May	Report Type	Last Saved	Submission Status	Operations links
	Updated	--	--	Start Report
	Preliminary	--	--	Start Report

April	Report Type	Last Saved	Submission Status	Operations links
	Preliminary	05/06/2021 - 13:16	✓ 05/06/2021 - 13:16	Edit

[Preliminary](#) [Updated](#)

Warning message

The May 2021 preliminary report must be submitted before creating an updated report.

Reporting period: 05/01/2021 to 05/31/2021

STATE REPORTS

Report Page

- The form is grouped into subforms to help guide the user when completing it or searching data within a specific group

Reporting period: 05/01/2021 to 05/31/2021 Print

Call Center Information	Call center information
Call Volume	You may name up to 10 call centers.
Call Center Wait Time	Call Center #1 Name
Abandonment Rate	<input type="text"/>
Number of Applications Received	Add another call center
Number of Electronic Accounts Transferred	Data Limitations
Number of Renewals	
Total Enrollment	
Total Number of Individuals Determined Eligible	
Total Number of Individuals Determined Ineligible	
Total Number of Pending Applications / Redeterminations	
Processing Time for Determinations	
Summary Data Limitations	

STATE REPORTS

Call Center

- Call centers are pre-populated with the ability to add up to 10 call centers or else to remove call centers

Call Center Information

Call Volume	
Call Center Wait Time	
Abandonment Rate	
Number of Applications Received	
Number of Electronic Accounts Transferred	
Number of Renewals	
Total Enrollment	
Total Number of Individuals Determined Eligible	
Total Number of Individuals Determined Ineligible	
Total Number of Pending Applications / Redeterminations	
Processing Time for Determinations	

Call center information

You may name up to 10 call centers.

Call Center #1 Name

Call Center #2 Name
 Remove

[Add another call center](#)

▼ Data Limitations

Please include an explanation of any data limitation that would affect the interpretation of data reported, including differences between the reported data and the data definition.

STATE REPORTS

Call Volume

- State Reporters can view previous month numbers for reference when entering Call Volume
- Incorrect entries will trigger error messaging

Call Center Information

Call Volume

Call Center Wait Time

Abandonment Rate

Number of Applications Received

Number of Electronic Accounts Transferred

Number of Renewals

Total Enrollment

Total Number of Individuals Determined Eligible

Total Number of Individuals Determined Ineligible

Total Number of Pending Applications / Redeterminations

Processing Time for Determinations

Call volume

Historical data represents last month's report.

1. Total Call Center Volume

Prev. month 51919	39821	↕
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By individual call center

TNHC 1-855-259-0701

Prev. month 36544	29418	↕
-------------------	-------	---

APC (Application Processing Center) 1-877-200-8340

Prev. month 15375	10403	↕
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[Data Limitations](#)

Call Center Wait Time

- Help text is below the fields to help users
- Incorrect entries will trigger error messaging

Call Center Information	Call center wait time Historical data represents last month's report.
Call Volume	
Call Center Wait Time	2. Average Call Center Wait Time <input type="text" value="0"/>
Abandonment Rate	Value in minutes, rounded to nearest whole minute.
Number of Applications Received	
Number of Electronic Accounts Transferred	By individual call center
Number of Renewals	TNHC 1-855-259-0701 <input type="text" value="0"/>
Total Enrollment	Value in minutes, rounded to nearest whole minute.
Total Number of Individuals Determined Eligible	APC (Application Processing Center) 1-877-200-8340 <input type="text" value="0"/>
Total Number of Individuals Determined Ineligible	Value in minutes, rounded to nearest whole minute.
Total Number of Pending Applications / Redeterminations	Data Limitations
Processing Time for Determinations	

Abandonment Rate

- Help text is below the fields to help users
- Incorrect entries will trigger error messaging

Call Center Information	Abandonment rate Historical data represents last month's report.
Call Volume	
Call Center Wait Time	
Abandonment Rate	3. Average Call Center Abandonment Rate Prev. month 0.002 0.004
Number of Applications Received	Value between 0 and 1 (inclusive), up to three decimal places.
Number of Electronic Accounts Transferred	By individual call center
Number of Renewals	TNHC 1-855-259-0701 Prev. month 0.001 0.001
Total Enrollment	Value between 0 and 1 (inclusive), up to three decimal places.
Total Number of Individuals Determined Eligible	APC (Application Processing Center) 1-877-200-8340 Prev. month 0.003 0.006
Total Number of Individuals Determined Ineligible	Value between 0 and 1 (inclusive), up to three decimal places.
Total Number of Pending Applications / Redeterminations	Data Limitations
Processing Time for Determinations	

Number of Applications Received

- Previous month data displays
- Help text is below the fields to help users
- Public reported indicator can be selected
- Incorrect entries will trigger error messaging

Call Center Information	Number of applications received Historical data represents last month's report.
Call Volume	
Call Center Wait Time	
Abandonment Rate	
Number of Applications Received	5a. Total Applications Received Prev. month 23212 21045 <small>This value should equal to a sum of the following: Applications Received by Medicaid Agency, Applications Received by CHIP Agency, and Applications Received by SBM.</small>
Number of Electronic Accounts Transferred	By the Medicaid agency
Number of Renewals	5b. Applications Received by Medicaid Agency Prev. month 23212 21045 <small>This value should be equal to a sum of the medicaid applications received by the following categories: online, mail, in-person, phone or other channels.</small>
Total Enrollment	By channel
Total Number of Individuals Determined Eligible	5c. Medicaid Applications Received Online Prev. month 15991 14337
Total Number of Individuals Determined Ineligible	5d. Medicaid Applications Received by Mail Prev. month 93 77
Total Number of Pending Applications / Redeterminations	5e. Medicaid Applications Received In-Person 0
Processing Time for Determinations	5f. Medicaid Applications Received by Phone Prev. month 3882 3369

STATE REPORTS

Electronic Account Transferred

- State Reporters can view previous month number for reference when entering data for Electronic Account Transferred
- Incorrect entries will trigger error messaging

Call Center Information	
Call Volume	
Call Center Wait Time	
Abandonment Rate	
Number of Applications Received	
Number of Electronic Accounts Transferred	
Number of Renewals	
Total Enrollment	
Total Number of Individuals Determined Eligible	
Total Number of Individuals Determined Ineligible	
Total Number of Pending Applications / Redeterminations	
Processing Time for Determinations	

6a. Total Account Transfers Received from the FFM	
Prev. month 5895	8478
6f. Assessed Account Transfers Received	
Prev. month 5895	8478
6g. Request for Full Determination Transfers Received	
Prev. month 5895	8478
6h. Transfers of Unknown Type Received	
0	
6j. Transfers to FFM	
Prev. month 10320	9668
Data Limitations	

STATE REPORTS

Number of Renewals

- State Reporters can view previous month numbers for reference when entering Renewal data
- Incorrect entries will trigger error messaging
- Help text displays to help users enter correct data

Call Center Information	Number of renewals Historical data represents last month's report.
Call Volume	
Call Center Wait Time	7a. Total Number of Renewals
Abandonment Rate	Prev. month 25389 27895
Number of Applications Received	This value should be equal to the sum of the subindicators.
Number of Electronic Accounts Transferred	By determination type
Number of Renewals	7b. Medicaid MAGI Renewals
Total Enrollment	Prev. month 20796 25540
Total Number of Individuals Determined Eligible	7c. Medicaid non-MAGI Renewals
Total Number of Individuals Determined Ineligible	Prev. month 2043 655
Total Number of Pending Applications / Redeterminations	7d. CHIP Renewals
Processing Time for Determinations	Prev. month 2550 1700
	7e. Unknown Type
	> Data Limitations

STATE REPORTS

Total Enrollment

- State Reporters can view previous month numbers for reference when entering Total Enrollment
- Incorrect entries will trigger error messaging
- Help text displays to help users enter correct data
- User can select relevant public indicators

Call Center Information	Total enrollment
Call Volume	Historical data represents last month's preliminary report.
Call Center Wait Time	
Abandonment Rate	8a. Total Medicaid Enrollees
Number of Applications Received	Prev. month 1468473 1477604
Number of Electronic Accounts Transferred	This value should be equal to the sum of Medicaid MAGI and Non-MAGI enrollees.
Number of Renewals	Medicaid MAGI enrollees
Total Enrollment	8b. Total MAGI Enrollees
Total Number of Individuals Determined Eligible	Prev. month 1073748 1079410
Total Number of Individuals Determined Ineligible	This value should be equal to the sum of MAGI child and adult enrollees.
Total Number of Pending Applications / Redeterminations	8c. MAGI Child Enrollees
Processing Time for Determinations	Prev. month 642469 644280
	8d. MAGI Adult Enrollees
	Prev. month 431279 435130
	Non-Medicaid MAGI enrollees

STATE REPORTS

Eligibility

- State Reporters can view previous month numbers for reference when entering Eligibility data
- Incorrect entries will trigger error messaging
- Help text displays to help users enter correct data
- Users can select relevant public indicators

Call Center Information	Total number of individuals determined eligible
Call Volume	Historical data represents last month's report.
Call Center Wait Time	Medicaid eligibility
Abandonment Rate	9a. Total Medicaid Eligible
Number of Applications Received	Prev. month 149623 114762
Number of Electronic Accounts Transferred	<small>This value should be equal to the sum of Medicaid MAGI and Non-MAGI eligibility determinations, as well as the sum of Medicaid eligibility subindicators.</small>
Number of Renewals	By determination type
Total Enrollment	9b. Medicaid MAGI Eligibility Determinations
Total Number of Individuals Determined Eligible	Prev. month 106664 80948
Total Number of Individuals Determined Ineligible	9c. Medicaid non-MAGI Eligibility Determinations
Total Number of Pending Applications / Redeterminations	Prev. month 42959 33814
Processing Time for Determinations	By reason of determination
	9d. Medicaid Eligibility Determined at Application
	Prev. month 8050 7201
	<small>This value should be equal to the sum of applications determined eligible under MAGI and Non-MAGI rules.</small>
	9e. Determined Medicaid Eligible at Application under MAGI Rules
	Prev. month 5184 4672

STATE REPORTS

Ineligible Individuals

- State Reporters can view previous month numbers for reference when entering Ineligible data
- Incorrect entries will trigger error messaging
- Footnotes appear to help user enter correct data

Call Center Information	Total number of individuals determined ineligible
Call Volume	Historical data represents last month's report.
Call Center Wait Time	Medicaid determination
Abandonment Rate	10a. Total Medicaid Ineligible
Number of Applications Received	Prev. month 21503 19216
Number of Electronic Accounts Transferred	This value should be equal to the sum of determinations by eligibility established state and determinations by type.
Number of Renewals	By determination reason
Total Enrollment	10b. Medicaid Determination - Ineligibility Established
Total Number of Individuals Determined Eligible	Prev. month 20699 18831
Total Number of Individuals Determined Ineligible	10c. Medicaid Determination - Eligibility Cannot be Established
Total Number of Pending Applications / Redeterminations	Prev. month 804 385
Processing Time for Determinations	By type of determination
	10d. Medicaid Determination - Ineligible at Application
	Prev. month 13655 12763
	10e. Medicaid Determination - Ineligible at Annual Renewal
	Prev. month 38 372

Pending Applications/Redeterminations

- Previous month number displays
- Incorrect entries will trigger error messaging

Call Center Information	Total number of pending applications / redeterminations
Call Volume	Historical data represents last month's preliminary report.
Call Center Wait Time	
Abandonment Rate	
Number of Applications Received	Pending at Medicaid agency
Number of Electronic Accounts Transferred	11a. Number Pending at Medicaid
Number of Renewals	Prev. month 19105 19190
Total Enrollment	11b. Type of Number Pending at Medicaid
Total Number of Individuals Determined Eligible	Mix of Individuals and Households
Total Number of Individuals Determined Ineligible	11c. Number Pending at Separate CHIP Agency
Total Number of Pending Applications / Redeterminations	11d. Type of Number Pending at Separate CHIP Agency
Processing Time for Determinations	- None -
	Data Limitations

STATE REPORTS

Processing Time

- Help text displays under fields to help user enter correct data
- Previous month data exists to give context when entering new month data

Call Center Information	Processing time for determinations Historical data represents last month's report.
Call Volume	
Call Center Wait Time	
Abandonment Rate	
Number of Applications Received	
Number of Electronic Accounts Transferred	
Number of Renewals	
Total Enrollment	
Total Number of Individuals Determined Eligible	
Total Number of Individuals Determined Ineligible	
Total Number of Pending Applications / Redeterminations	
Processing Time for Determinations	
	12a. Median Processing Time (Days) at Medicaid 6 <small>Please only enter a 0 to indicate real time processing, not to indicate missing data.</small>
	Type of Medicaid Determination
	12b. Processing Time for MAGI Determination 3 <small>Please only enter a 0 to indicate real time processing, not to indicate missing data.</small>
	12c. Processing Time for Non-MAGI Determination 27 <small>Please only enter a 0 to indicate real time processing, not to indicate missing data.</small>
	Source of Medicaid application
	12d. Processing Time for Direct Application to Medicaid Agency 6 <small>Please only enter a 0 to indicate real time processing, not to indicate missing data.</small>

Errors

A dark blue diagonal gradient bar that starts from the bottom-left corner and extends towards the top-right corner, covering the lower half of the slide.

ERRORS

Errors

Errors are denoted two ways:

1. Red border around the field when the user is in the for section
2. An error icon under navigation section to alert the user there is an error in the section

Saving a draft ignores the errors

The screenshot displays a web form with a sidebar on the left and a main content area on the right. The sidebar contains a list of navigation items: 'Call Center Information', 'Call Volume', 'Call Center Wait Time', 'Abandonment Rate', 'Number of Applications Received', 'Number of Electronic Accounts Transferred', 'Number of Renewals', 'Total Enrollment', 'Total Number of Individuals Determined Eligible', 'Total Number of Individuals Determined Ineligible', 'Total Number of Pending Applications / Redeterminations', and 'Processing Time for Determinations'. The 'Abandonment Rate' item is highlighted with a blue border and a red error icon and '1 Error' message. The main content area is titled 'Abandonment rate' and includes a subtitle 'Historical data represents last month's report.' Below this is a section for '3. Average Call Center Abandonment Rate' with a text input field containing 'Prev. month 0.004' and '.454'. A red border surrounds the input field, and a red error icon and '1 Error' message are visible. Below the input field, a note states: 'This value must be equal to the weighted average of subindicators based on call volume to save the report. Value between 0 and 1 (inclusive), up to three decimal places.' A section titled 'By individual call center' is visible below, with a link for '> Data Limitations'. At the bottom of the form, there is a 'Summary Data Limitations' link, a 'Last saved: 06/23/2021 7:35:32 PM' timestamp, and two buttons: 'Save Draft' and 'Submit'.

Call Center Information

Call Volume
1 Error

Call Center Wait Time

Abandonment Rate
1 Error

Number of Applications Received

Number of Electronic Accounts Transferred

Number of Renewals

Total Enrollment

Total Number of Individuals Determined Eligible

Total Number of Individuals Determined Ineligible

Total Number of Pending Applications / Redeterminations

Processing Time for Determinations

> Summary Data Limitations

Last saved: 06/23/2021 7:35:32 PM

Save Draft Submit

Abandonment rate

Historical data represents last month's report.

3. Average Call Center Abandonment Rate

Prev. month 0.004 .454

This value must be equal to the weighted average of subindicators based on call volume to save the report.
Value between 0 and 1 (inclusive), up to three decimal places.

By individual call center

> Data Limitations

ERRORS

Submit with Errors

- Users that submit with errors or missing information will be shown an error message
- Error icons display in each section

Error message

These indicators and attributed footnotes are accurate and ready to be published publicly field is required.
This value must be equal to the weighted average of subindicators based on call volume to save the report.
This value must equal the sum of subindicators to save the report.

Reporting period: 05/01/2021 to 05/31/2021 [Print](#)

Call Center Information

Call Volume 1 Error	<h3>Call center information</h3> <p>You may name up to 10 call centers.</p> <p>Call Center #1 Name</p> <input type="text"/> Add another call center
Call Center Wait Time	
Abandonment Rate 1 Error	
Number of Applications Received 1 Error	
Number of Electronic Accounts Transferred	
Number of Renewals	
Total Enrollment 1 Error	
Total Number of Individuals Determined Eligible 1 Error	
Total Number of Individuals Determined Ineligible	
Total Number of Pending Applications / Redeterminations	
Processing Time for Determinations	

[Data Limitations](#)

Thank You.

A dark blue diagonal gradient bar that starts from the bottom left corner and extends towards the top right corner, covering the lower half of the page.