Introductory Reference Document for MACPro Roles and Administration

Reflects MACPro Environment as of 2/5/2018

Version: 8.0

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Introduction

This document describes the steps The Centers for Medicare & Medicaid Services (CMS) and state users follow to request, review, approve, or deny roles within MACPro. Steps on role removal and task reassignment are available as well.

- For a list of common terms used in this document, along with their definitions, refer to the Glossary in the Appendix.
- For questions regarding the use of MACPro, please contact the MACPro Help Desk, Monday through Friday, 9:00 am – 7:00 pm Eastern Time via the MACPro Help Desk email address, MACPro_HelpDesk@cms.hhs.gov, or call at 301-547-4688. Alternatively, you can fill out the Request System Help form within MACPro.
- **The MACPro Help Desk Team welcomes your suggestions for our training and reference materials. Please contact us with your feedback and comments on this training, or if you need other MACPro assistance.**

NOTE: The images in this document are reflective of a training environment; the available options in your environment may differ based on your user role.

What is MACPro?

MACPro is a web-based application for the submission, review, disposition, and management support of Medicaid and Children's Health Insurance Program (CHIP) initiatives, Quality Measures Reporting, State Plan Amendments (SPA), Waivers, Demonstrations and Advance Planning Documents.

MACPro is the current system being used to improve state reporting and federal review processes, federal program management, and transparency. It also supports data-driven decision making for Medicaid and CHIP programs through online access to data and information.

Obtaining MACPro Access

MACPro is integrated with the Enterprise Portal (EIDM), a CMS shared service. EIDM is an identity management and services system that provides users with access to a variety of CMS applications. An EIDM account ensures that only authorized and registered users can access protected information and systems through the CMS Enterprise Portal. All existing and potential MACPro users, regardless of user role, are required to have an Enterprise Identity Management (EIDM) ID.

There are six steps necessary to obtain access to MACPro.

Steps 1 through 3 are completed via the Enterprise Portal (https://portal.cms.gov). Instructions for completing steps 1 and 2 can be found on Mediciad.gov in the EIDM Instructions for MACPro users: https://www.medicaid.gov/state-resource-center/medicaid-and-chip-program-portal/downloads/eidminstructionsmacprousers.pdf.

Note: All state users must request the MACPro State User role. All CMS users must request the MACPro CMS Staff User role, unless otherwise notified

1. Register for an EIDM ID (if you do not already have one)
2. Request the appropriate MACPro User role through the EIDM
   a. All state users must request the "MACPro State User" role in EIDM. All CMS users must request the "MACPro CMS Staff User" role in EIDM, unless otherwise notified.
3. Receive approval for your MACPro User role request (via email)

Steps 4 through 6 are completed via MACPro (https://macpro.cms.gov). Instructions for steps 4 and 5 can be found in the Requesting a Role(s) section in this document.

4. After your MACPro User role in EIDM has been approved, log in to MACPro with your EIDM credentials
5. Request all roles needed in MACPro
6. Receive approval for your MACPro role request(s) (via email)

Web Browser/Software Requirements for MACPro

The table below provides a list of browsers/software and versions compatible with MACPro.

Browser/Software	Version necessary to access MACPro
Google Chrome	Google Chrome updates automatically. The most recent version is supported **NOTE:** Google Chrome is the optimal web browser for using MACPro.
Mozilla Firefox	Mozilla Firefox updates automatically. The most recent version is supported
Microsoft Internet Explorer	Version 11 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
Windows 10	Not applicable. Software does not impact ability to access MACPro
OS X Yosemite	Not applicable. Software does not impact ability to access MACPro

MACPro User Roles

Roles in MACPro determine in what capacity a user will utilize the application. Distinct roles have been established in MACPro for CMS users, State users, and Business Support users.

It is important to note that the user roles in MACPro differ from roles used in other CMS web-based systems, including EIDM, CARTS, MMDL, and WMS – and for some applications, this is the first time that there are roles.

MACPro State User Roles

This table describes the MACPro roles available to state users. Users must first obtain the **MACPro State User** role in EIDM to request the roles listed in this table.

NOTE: There are no role sharing limitations for state user roles; therefore, state users may hold more than one of the roles listed below. Additionally, there may be multiple State System Administrators (SSAs) per state.

MACPro Role	Role Description	Role Approver
State Director (SDIR)	• Reviews QM reports or submission packages • Certifies and submits the QM report • Certifies a submission package	SSA
State Editor (SE)	• Creates and updates the QM report, draft or official submission package prior to submission • Converts Draft packages to Official packages	SSA
State Point of Contact (SPOC)	• Serves as the primary contact for all state submissions • Reviews and may update submission package or QM report content • Submits Draft and Official submission packages to the State Director and to CMS • Un-certifies QM reports • Documents and reviews correspondence log entries • Responds to the RAI/SMI	SSA
State System Administrator (SSA)	• Reviews and dispositions state user role requests • Reassigns state specific tasks on behalf of users • Reviews and dispositions role removal requests • Creates and maintains the State Profile • Views all system reports for the state	CMS System Administrator (CSA)

MACPro CMS User Roles

This table describes the MACPro roles available to CMS Users. Users must first obtain the **MACPro CMS Staff User** role in EIDM to request the roles listed in this table.

NOTE: The CMS System Administrator (CSA) cannot hold any other role in MACPro.

MACPro Role	Component	Role Description	Role Approver
CMS Package Approver	State Plan	• Evaluates recommended dispositions of approval, including disapproval justification • Approves SPA packages	CSA
CMS Disapproval Coordinator	State Plan	• Tailors disapproval notice to the state • Assembles disapproval package • Coordinates the Official submission package through the CMS senior review and clearance process for recommended disapprovals	CSA
CMS Package Disapprover	State Plan	• Evaluates recommended dispositions of disapproval, including disapproval justification • Disapproves SPA packages	CSA
CMS Point of Contact (CPOC)	State Plan	• Oversees the review of Draft and Official submissions • Assigns and maintains the composition of the review team (selects SRT members) • Documents and reviews correspondence log entries • Reviews and compiles review team comments • Recommends a disposition for an Official submission package • Requests submission package clarification (informal) • Generated and submits RAI (formal) • Tailors approval notice to the state • Sets and manages internal milestones and reminders for the SRT, and Sr. Reviewers • Oversees the Official submission package through the CMS senior review process for recommended approvals	CMS Role Approver (CRA)
CMS Report Admin	State Plan	• Requests/views all reports on behalf of CMS Senior staff • Views submission packages on behalf of CMS Senior staff	CSA
CMS Role Approver (CRA)	State Plan	• Reviews and dispositions CPOC and SRT role requests • Reassigns tasks for the CPOC role • Reviews and dispositions role removal requests for CPOC and SRT roles	CSA
CMS Senior Reviewer	State Plan	• Requests/views all system reports • Evaluates recommended dispositions • Reviews the submission package disapproval justification • Reassigns tasks for Package Approver/Disapprover, Disapproval Coordinator, Senior Reviewer and CPOC	CSA
CMS CO/RO	Quality Measures	• CMS Central Office staff with no direct responsibility for implementing and/or administering the quality measurement programs, but who may be interested in state reporting of the measures	CMS CO Admin

MACPro Role	Component	Role Description	Role Approver
CMS Submission Review Team (SRT)	State Plan	• Receives package review assignments • Reviews and submits comments for Draft and Official submissions • Provides assessments for submission package RUs	CRA
CMS Subscriber	State Plan	• Views read-only versions of state submission packages • Subscribes to particular states or areas of interest	CSA
CMS System Administrator (CSA)	State Plan and Quality Measures	• Reviews and dispositions user role requests • Requests/Views all system reports • Reassigns tasks on behalf of the Package Approver/Disapprover, Disapproval Coordinator, Senior Reviewer and CMS CO Admin • Reviews and dispositions role removal requests	CSA
CMS CO Administrator	Quality Measures	• CMS Central Office staff with direct responsibility for implementing and/or administering the quality measurement programs • Reviews and dispositions CMS CO/RO, Technical Assistance/Analytic Support, and Researcher roles • Reassigns tasks on behalf of CMS CO Admin and Technical Assistance/Analytic Support roles	CSA

MACPro Business Support User Roles

This table describes on the MACPro roles available to users holding the **MACPro Business Support User** role in EIDM.

MACPro Role	Component	Role Description	Role Approver
Researcher	Quality Measures	• CMS support user with no direct responsibility for implementing or administering the quality measurement programs, but has CMS-related or approved business needs for which access to state reporting of the quality measures is necessary/required	CMS CO Admin
Technical Assistance/ Analytic Support	Quality Measures	• CMS support user associated with central office quality measurement staff with direct responsibility for helping CMS to implement and/or administer quality measurement programs	CMS CO Admin

User Management Tips

Requesting Roles

1. Users cannot approve their own role requests.
2. All requests for the State System Administrator (SSA) role are routed to CMS for approval.
3. If a user submits a role request, they may not submit an additional request until the pending request is approved or denied.
4. Users can request multiple roles at one time if it agrees with role sharing limitations.
5. CMS Users must enter a [Front Line Manager](#) upon their first role request in MACPro.

Removing Roles

1. If a user attempts to request to remove a role and they have a pending task, they will receive a notification. At that point, the user can either complete the task, can go back and reassign the task (depending on the user's role), or submit the role removal request to have the appropriate administrator reassign the task upon approving the role removal request.
2. If a role approver approves a role removal request, and the requester is the only user in that role, the approver will be notified that the role is now vacant.
3. **IMPORTANT NOTE:** Removing a role from a MACPro profile is different than discontinuing MACPro access. If a user no longer requires MACPro access, contact the MACPro Help Desk at Macpro_Helpdesk@cms.hhs.gov.

Reassigning Tasks

1. Users can reassign their own tasks to another user, if the recipient has matching role attributes. The following roles can reassign their own task: State Editor, State Point of Contact, State Director, CMS Point of Contact, Senior Reviewer, Package Approver/Disapprover, Disapproval Coordinator, CMS CO Admin, Technical Assistance/Analytic Support.
2. If a task must be unassigned from a user but there is no other appropriate user in MACPro to assign it to, the user will be advised that the task will be unassigned and given the option to cancel or accept.
3. Senior Reviewers can reassign tasks for the following roles: Package Approver, Package Disapprover, Disapproval Coordinator, Senior Reviewer and CMS Point of Contact.
4. **IMPORTANT NOTE**: All Administrator roles cannot reassign role requests or role removal requests.
5. The Submission Review Team role cannot self-reassign tasks.

General Users: Managing Roles & Tasks

Requesting One or More Role(s)

This section provides instructions for users to request a new role in MACPro.

1. Log in to MACPro with EIDM credentials.

2. Select the **Records** tab from the upper toolbar and then select "**My User Profile**".
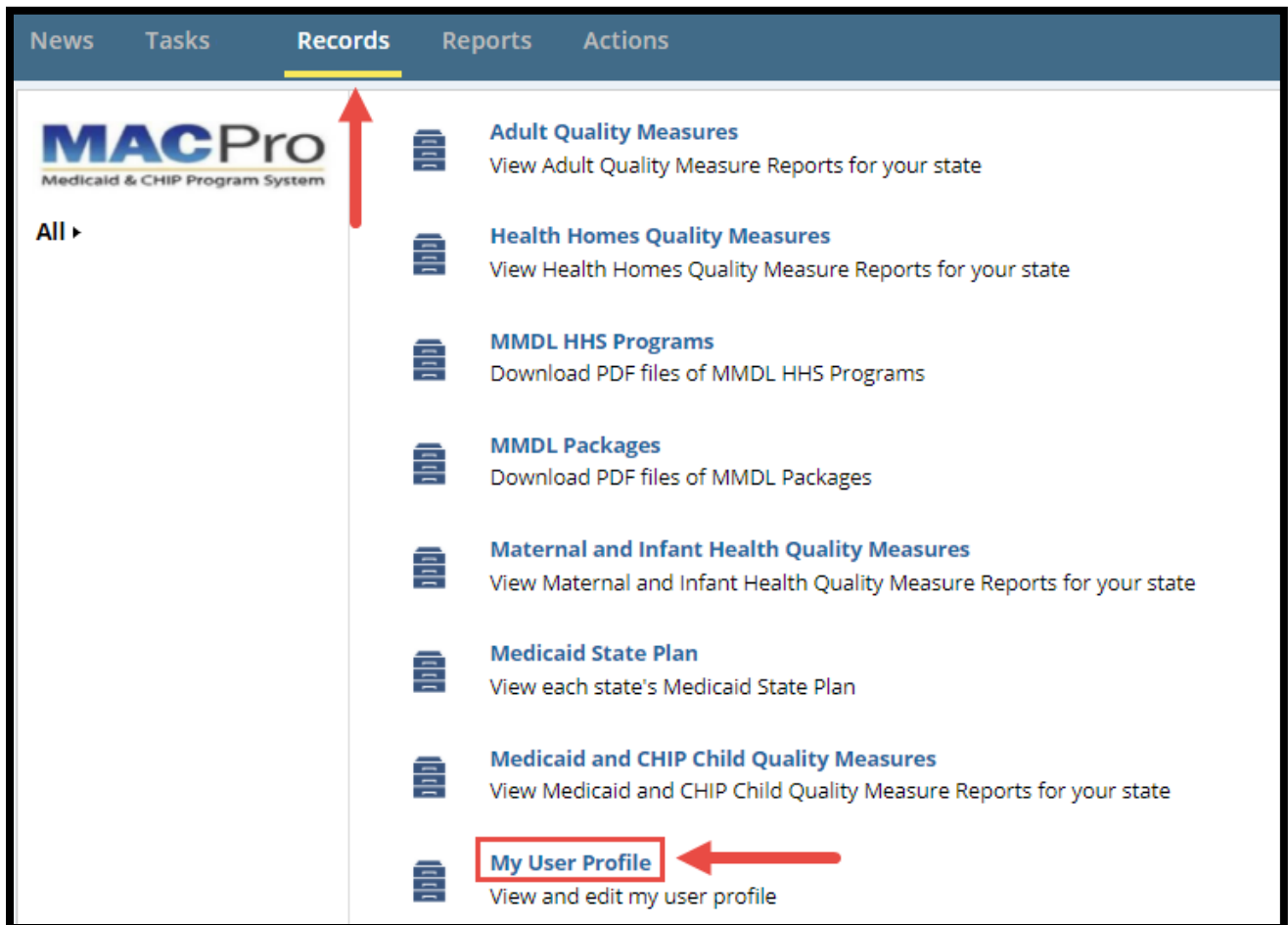
Figure 1: Records tab

3. Select your **name**.

Figure 2: Username link

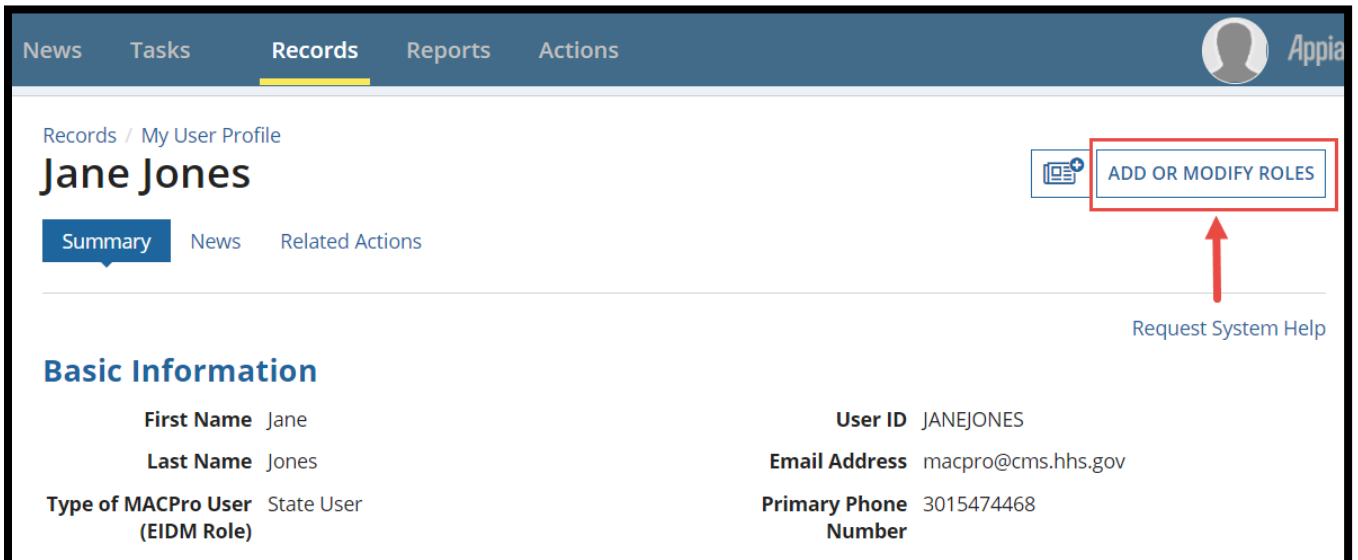**4.** Select the "**Add or Modify Roles**" button in the upper-right corner.
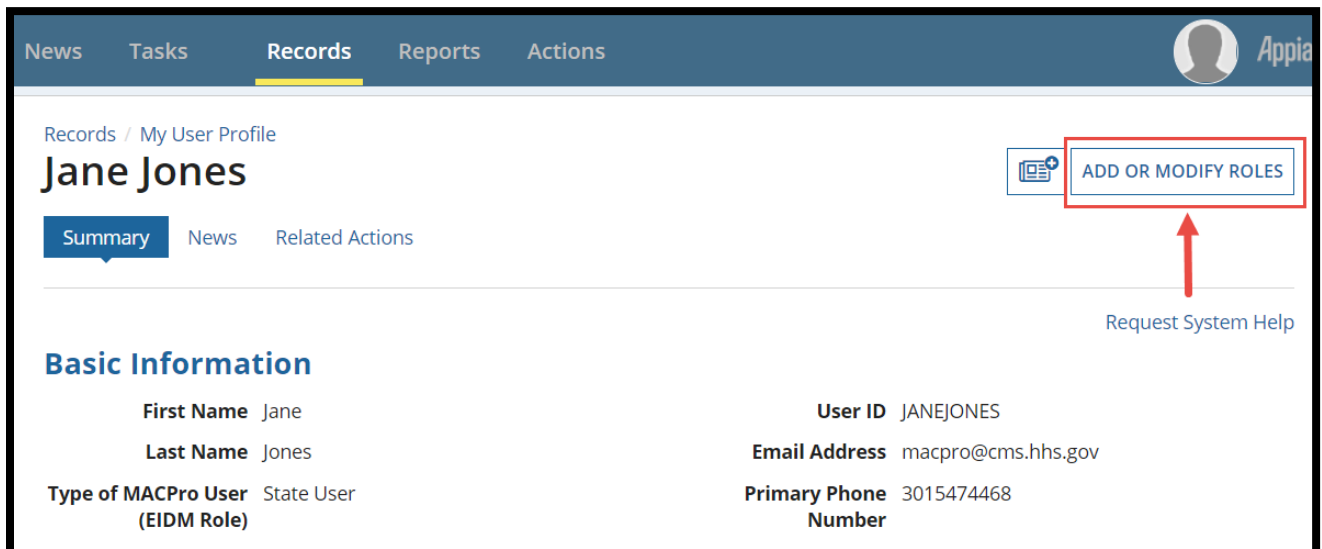
Figure 3: Add or Modify Roles button.

a. Alternatively, select "**Related Actions**" from the profile toolbar.
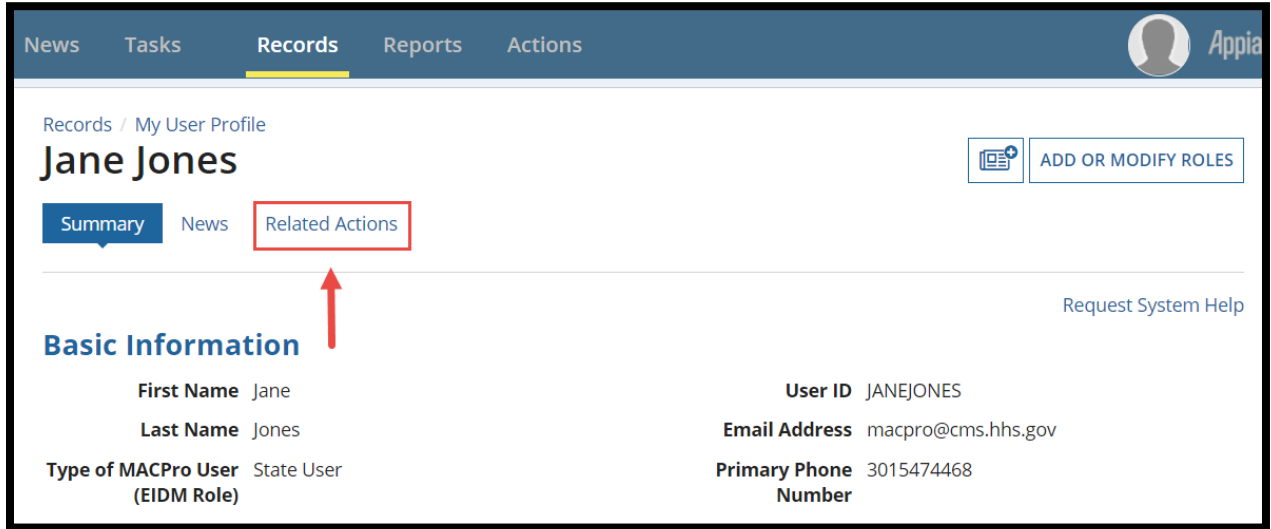
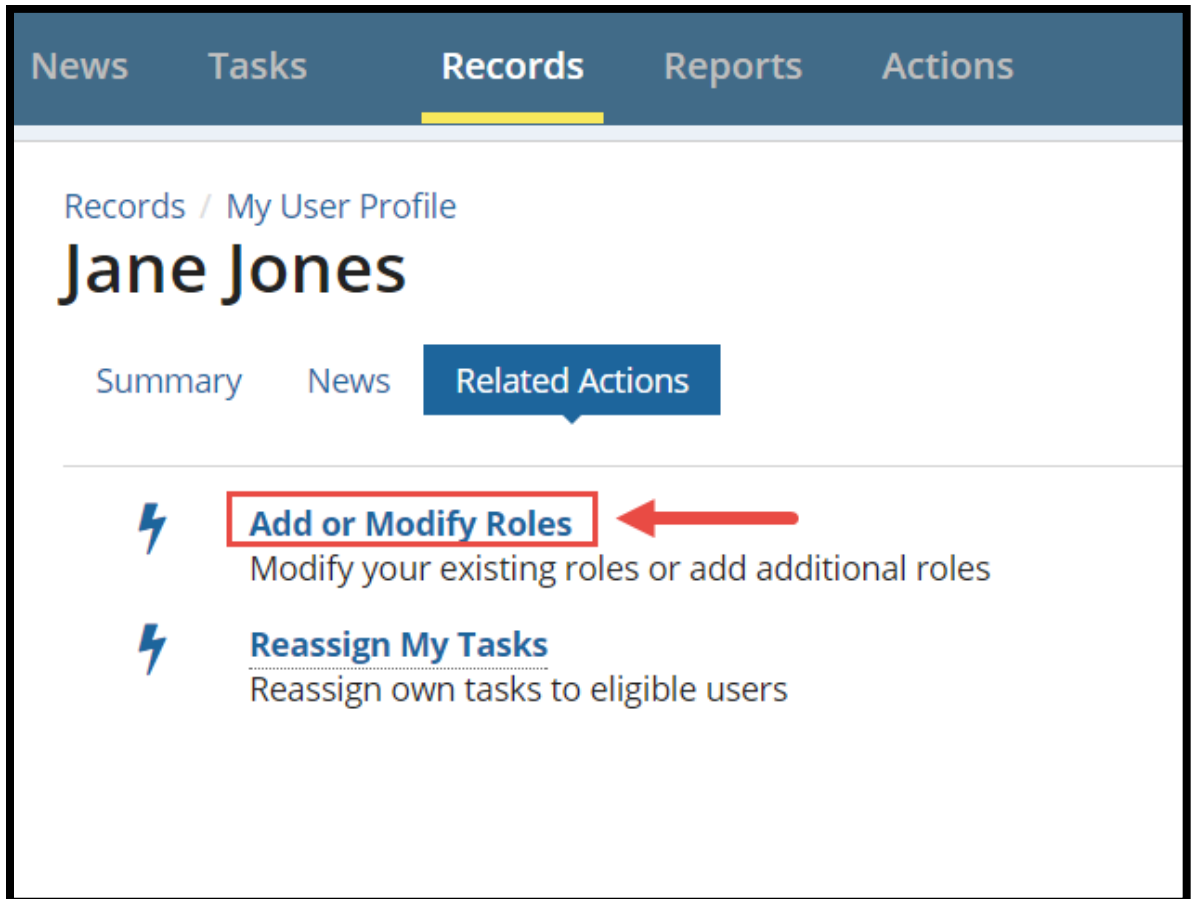Figure 4: Related Actions link

b. Select "**Add or Modify Roles**."
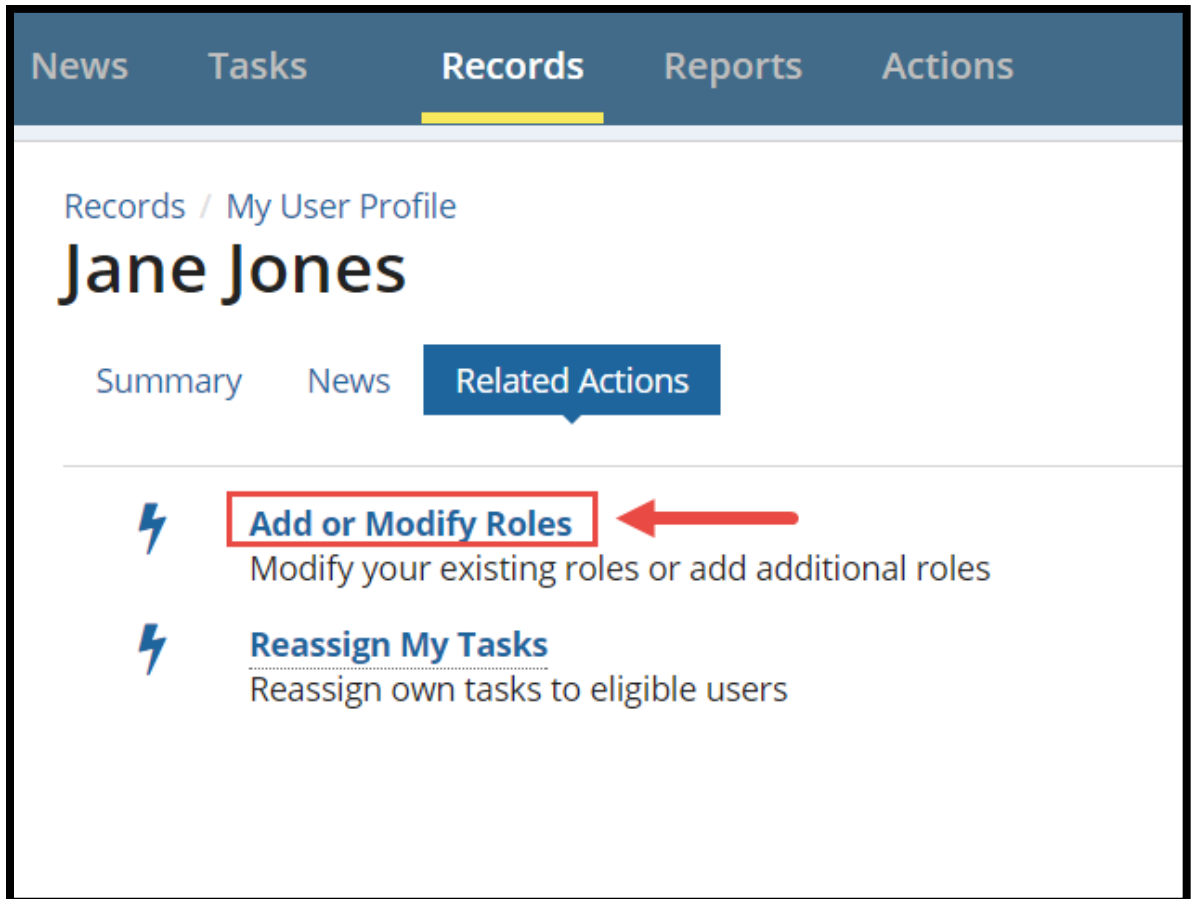
Figure 5: Add or Modify Roles link

5. Select the appropriate Role, Program, Component, Authority, Office Type, Region, and State from the drop-down menu in the "**Add Role(s)**" section. Depending on the selections made, additional fields may become available or populate with information. When selecting options for each field, complete the left column first and then the right column.

   NOTE: CMS roles will need to fill out the Frontline Manager field upon their first role request. Refer to the section in Appendix on how to fill out this field.

Figure 6: Add Role section

6. Select multiple options under each respective drop-down menu, if applicable.

NOTE: Depending on the role selection, drop-down menus that may allow multiple selections include Component, Authority, State/Territory, Office Type, Region.

Figure 7: Authority drop-down

7. Select the "**Add Role**" button and then the role request will appear in the "**New Role Request**" section.

Figure 8: Add Role button

Figure 9: New Role Request action

8. If adding multiple roles, fill out the "**Add Role**" section again with the desired role and select the "**Add Role**" button again.

Figure 10: Add Role section

9. If necessary, select the red "**x**" icon to remove a role request.

Figure 11: Red "x" link to remove a role request

10. Select "**Check Validation**" in the bottom-right corner once all required fields are completed.

Figure 12: Check Validation button

11. If validation errors are present, they will be listed below the New Role Request table. All validation errors must be fixed before the role request can be submitted.

Figure 13: Validation error

12. Select the "**Request**" button once all validation errors have been resolved.

Figure 14: Request button

13. Select "**Yes**" to the confirmation prompt.

Figure 15: Yes button in prompt

Modifying Current Roles

This section provides instructions on how users can modify their current roles.

1. Select the **Records** tab from the upper toolbar and then select "**My User Profile**."


Figure 16: My User Profile link under the Records tab

2. Select your **name**.

Figure 17: Username link

3. Select the "**Add or Modify Roles**" button in the upper-right corner.

Figure 18: Add or Modify Roles button

a. Alternatively, select "**Related Actions**" from the profile toolbar.
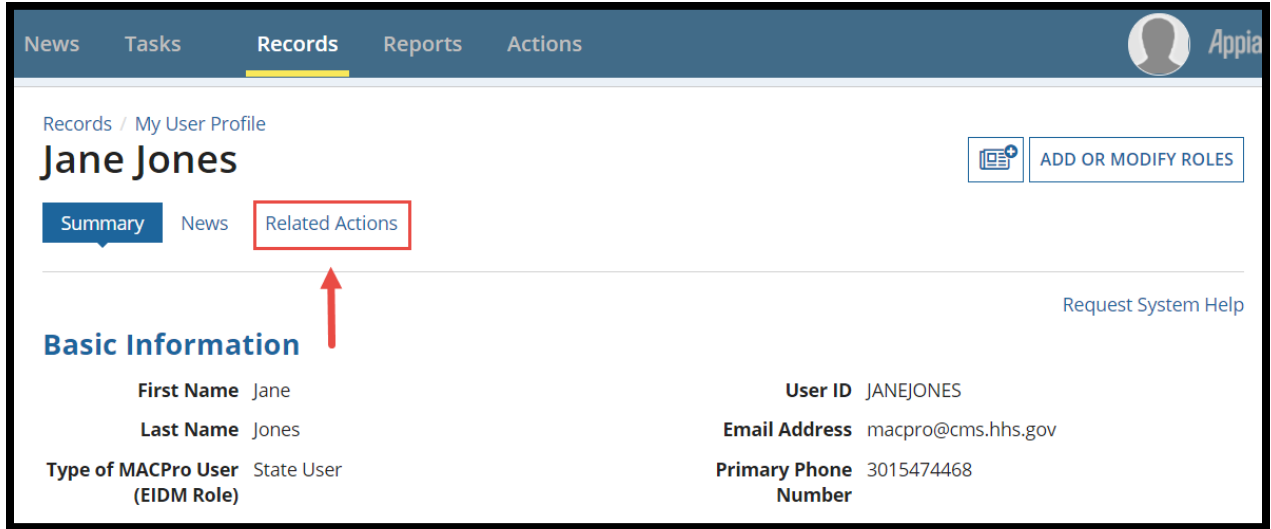
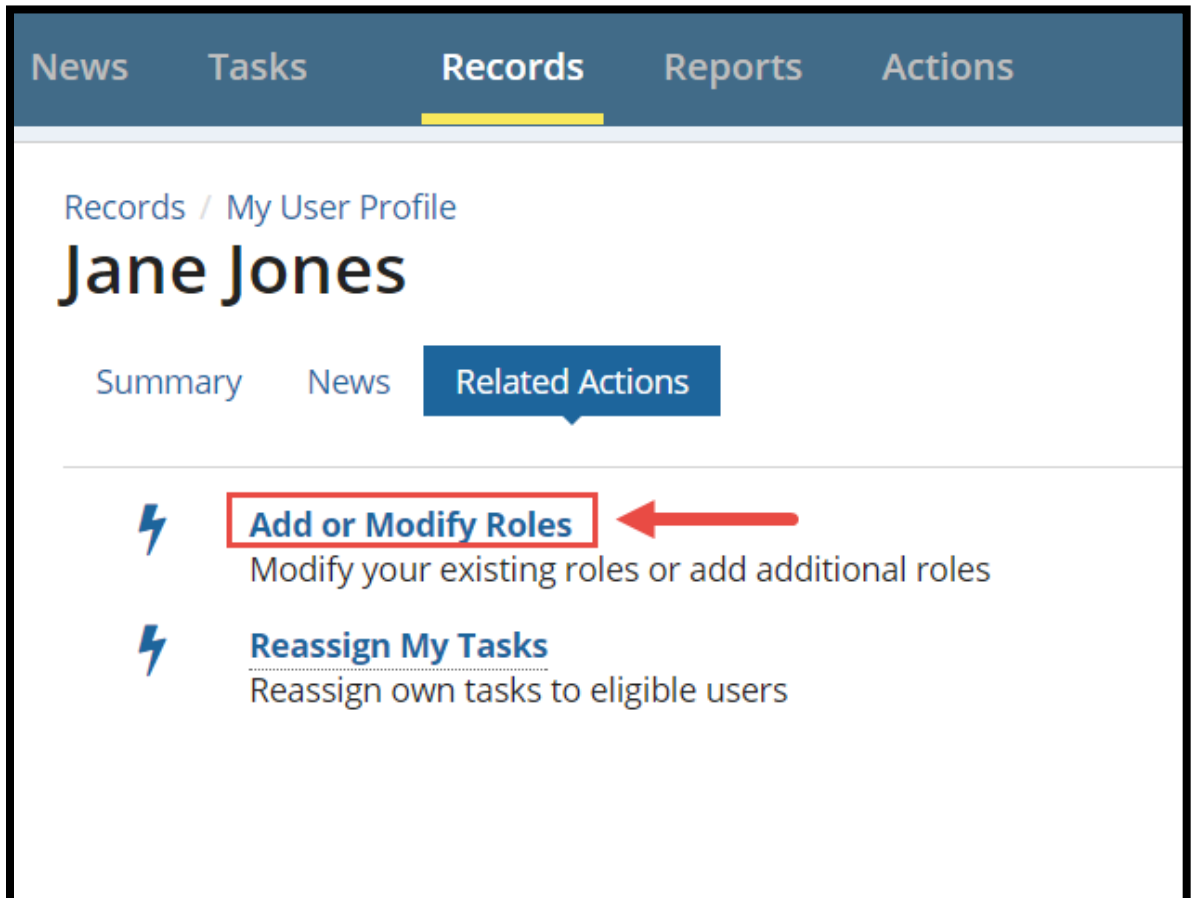Figure 19: Related Actions link

b. Select "**Add or Modify Roles**."

Figure 20: Add or Modify Roles link

4. Select "**Modify**" under the "**Current Role(s)**" table.

Figure 21: Modify link

5. Update fields as necessary under the "**Modify Role(s)**" section.

Figure 22: Modify Role section

6. Select "**Modify Role**" once the fields are updated.

   NOTE: The "**Modify Role**" button will not become active until a field is updated.

Figure 23: Modify Role button

7. Select "**Check Validation**" at the bottom-right corner. All validation errors must be resolved before the role request can be submitted.

   NOTE: If a user submits a modification request for a role that has an open and accepted task, a validation error will appear stating that the role cannot be requested due to open tasks. Complete all open tasks and try again.

Figure 24: Check Validation button

8. Select the "**Request**" button once all validation errors are resolved.

Modification Request

Role	Program	State/Territory	Component	Authority	Official Type	Region	Title (for Notice)	
State Point of Contact (SPOC)	Medicaid	Kansas	Quality Measure Reporting (QMR)	Maternal and Infant Health Quality Measures (MIHQM)	N/A	N/A	N/A	✕

Validation Error: None

CANCEL   CHECK VALIDATION   REQUEST

Figure 25: Request button

9. Select "**Yes**" to the confirmation prompt.

Are you sure you want to submit these requests? You will not be able to request additional roles until these roles are approved/denied.

YES   NO

Figure 26: Yes button in Prompt

Removing a Role

This section provides instructions on how users can remove a current role in MACPro.

1. Select the **Records** tab from the upper toolbar and then select "**My User Profile**."
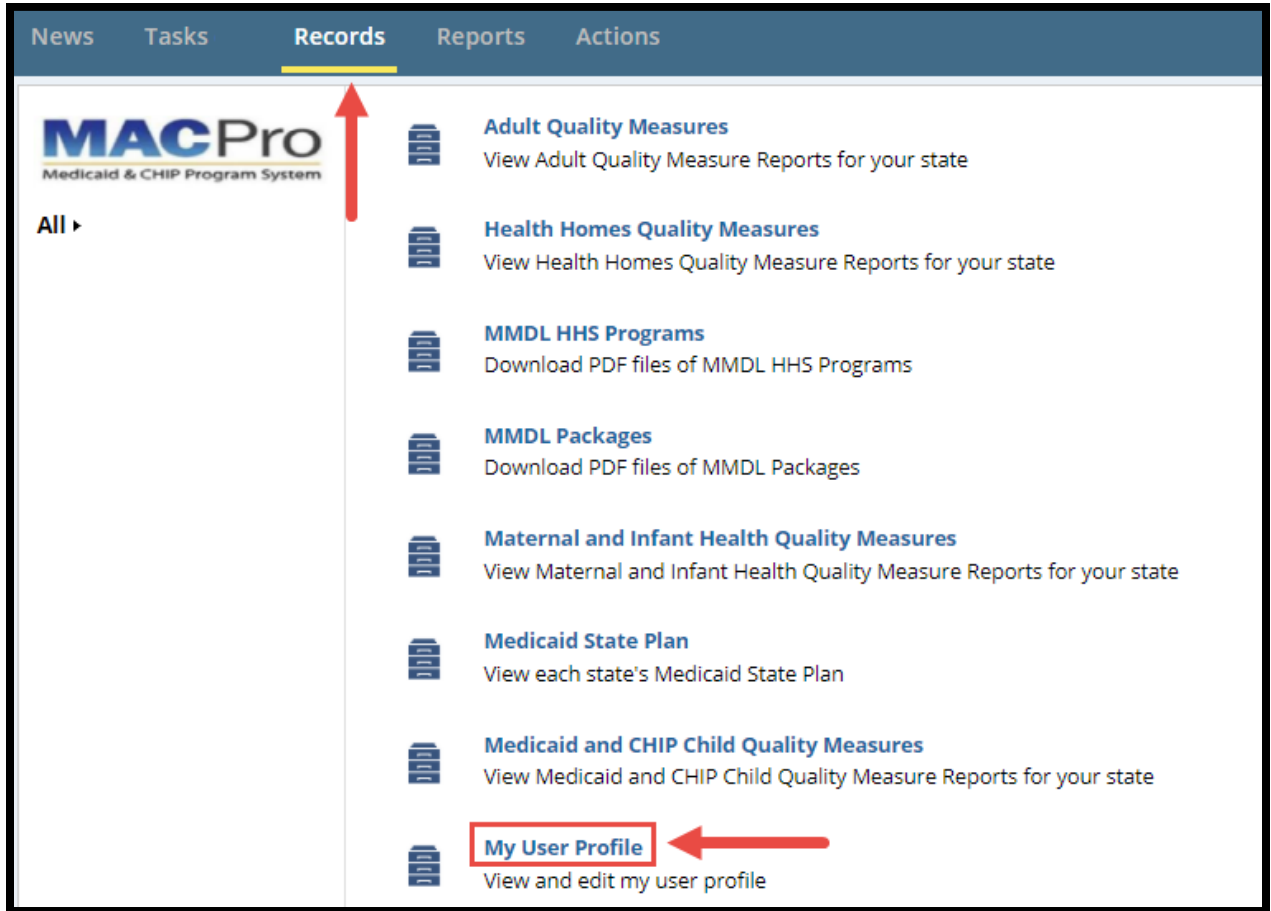
Figure 27: My User Profile link

2. Select your **name**.
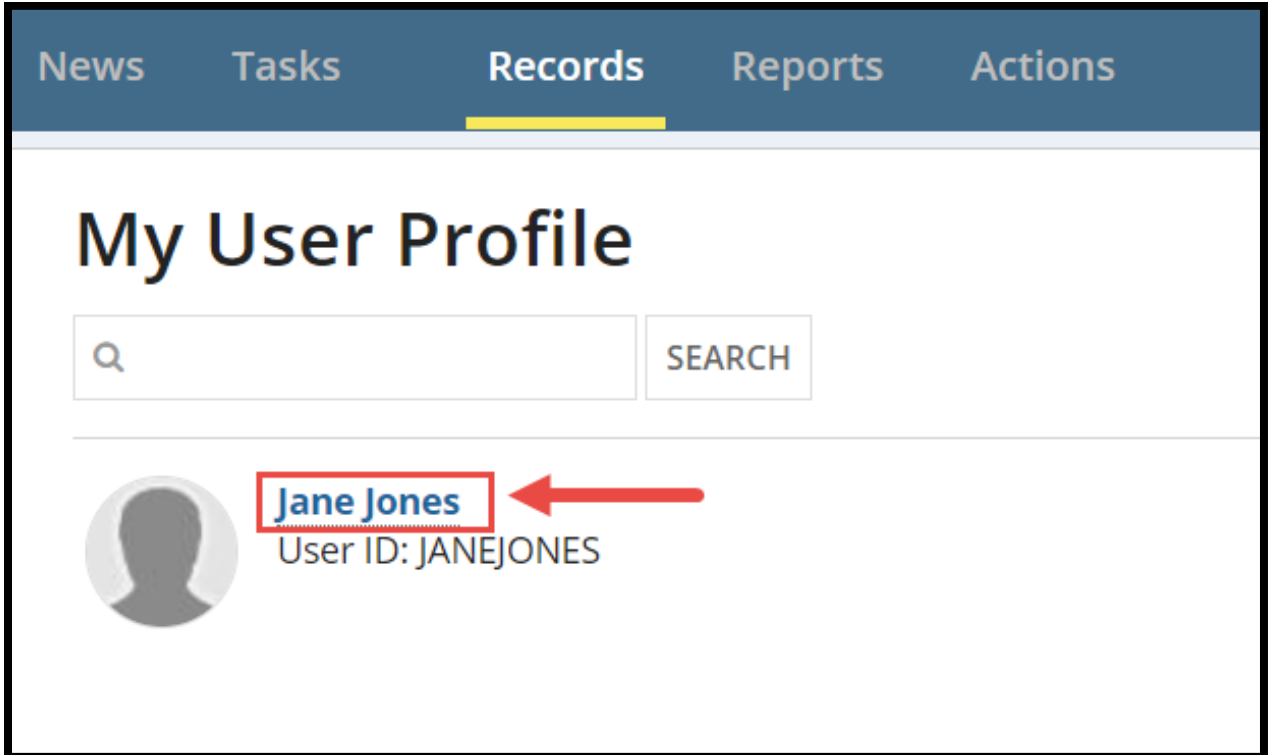
Figure 28: Username link

3. Select the "**Add or Modify Roles**" button in the upper-right corner.
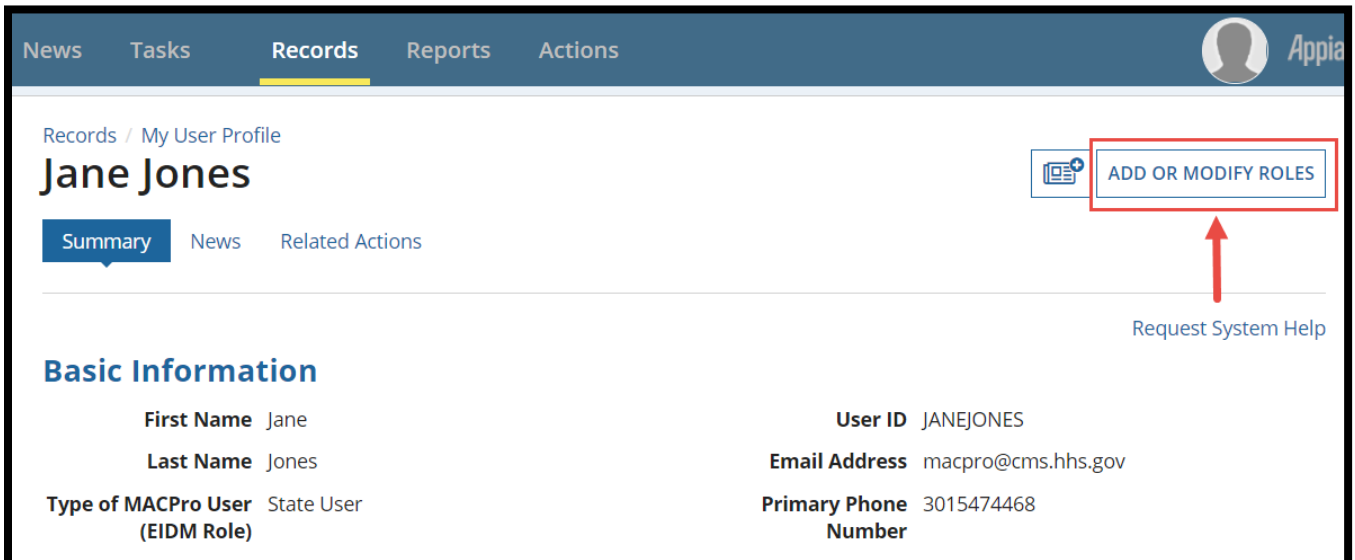
Figure 29: Add or Modify Roles button

a. Alternatively, select "**Related Actions**" from the profile toolbar.
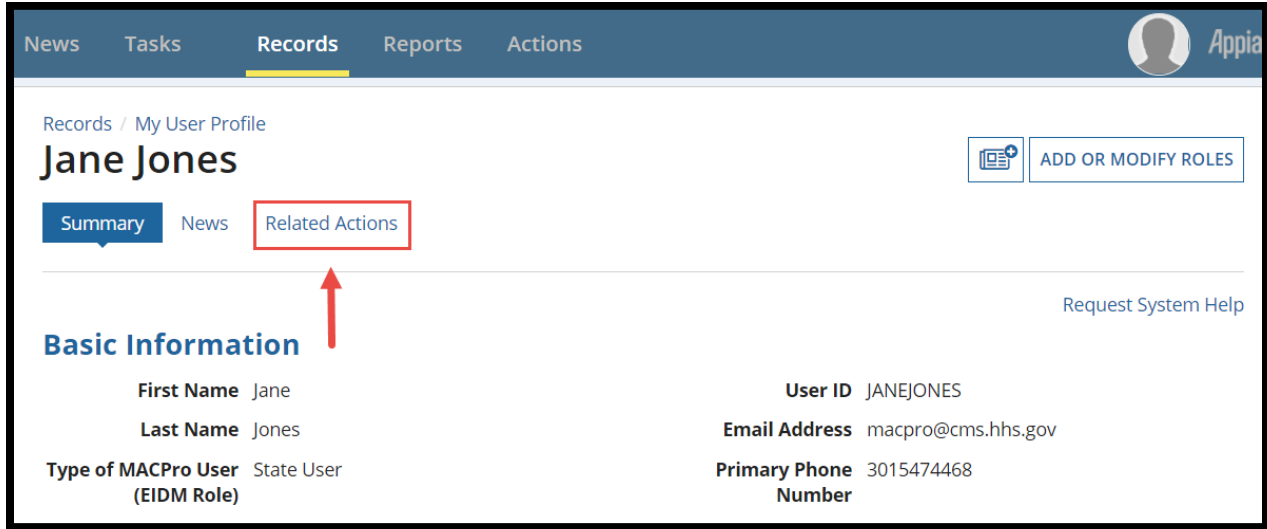
Figure 30: Related Actions link

b. Select "**Add or Modify Roles**."

Figure 31: Add or Modify Roles link

4. Select "**Remove**" in the "**Current Role(s)**" table.

Figure 32: Remove link

5. Select "**Check Validation**" in the bottom-right corner. All validation errors must be resolved before a role request is submitted.

Figure 33: Check Validation button

6. Select "**Request**" once all validation errors are resolved.

Figure 34: Request button

7. Select "**Yes**" to the confirmation prompt.

Figure 35: Yes button in Prompt

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Reassigning Tasks

This section provides instructions on how users can reassign an accepted task to another user.

NOTE: To reassign a task to another user, the task recipient must have matching role and authority attributes.

1. Select the **Records** tab from the upper toolbar and then select "**My User Profile**."
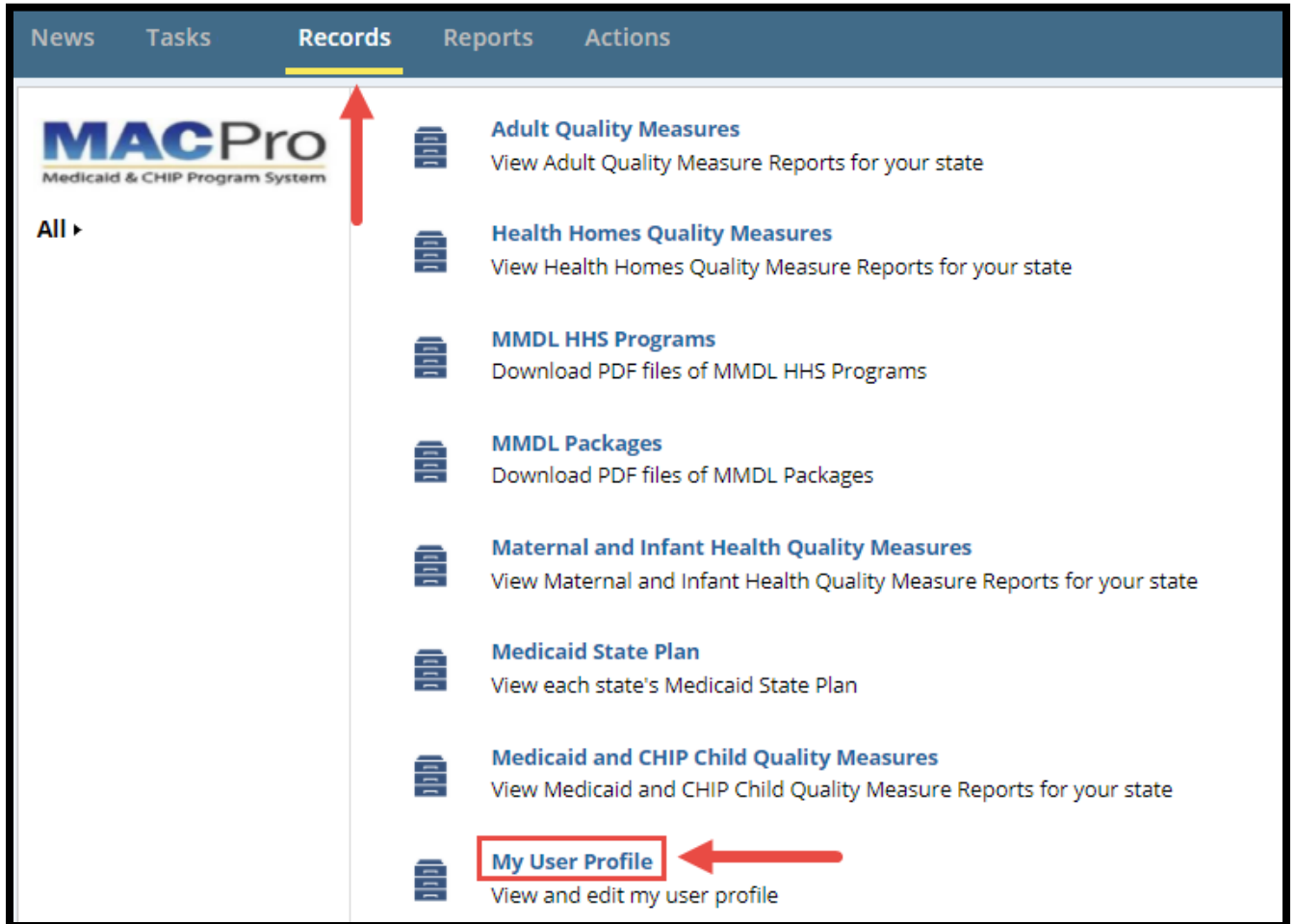
Figure 36: My User Profile link

2. Select your **name**.

Figure 37: Username link

3. Select "**Related Actions**" from the profile toolbar.
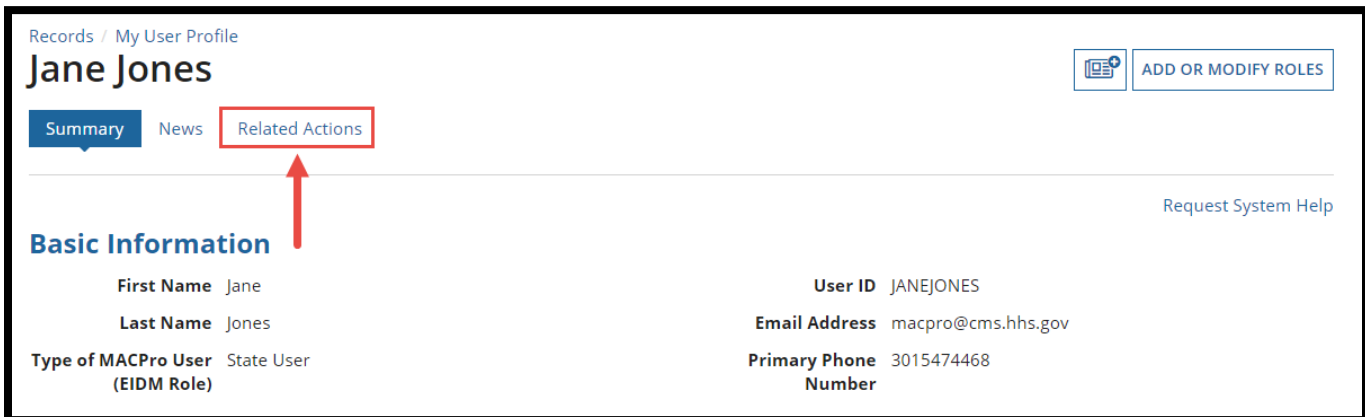
Figure 38: Related Actions link

4. Select "**Reassign My Tasks**."
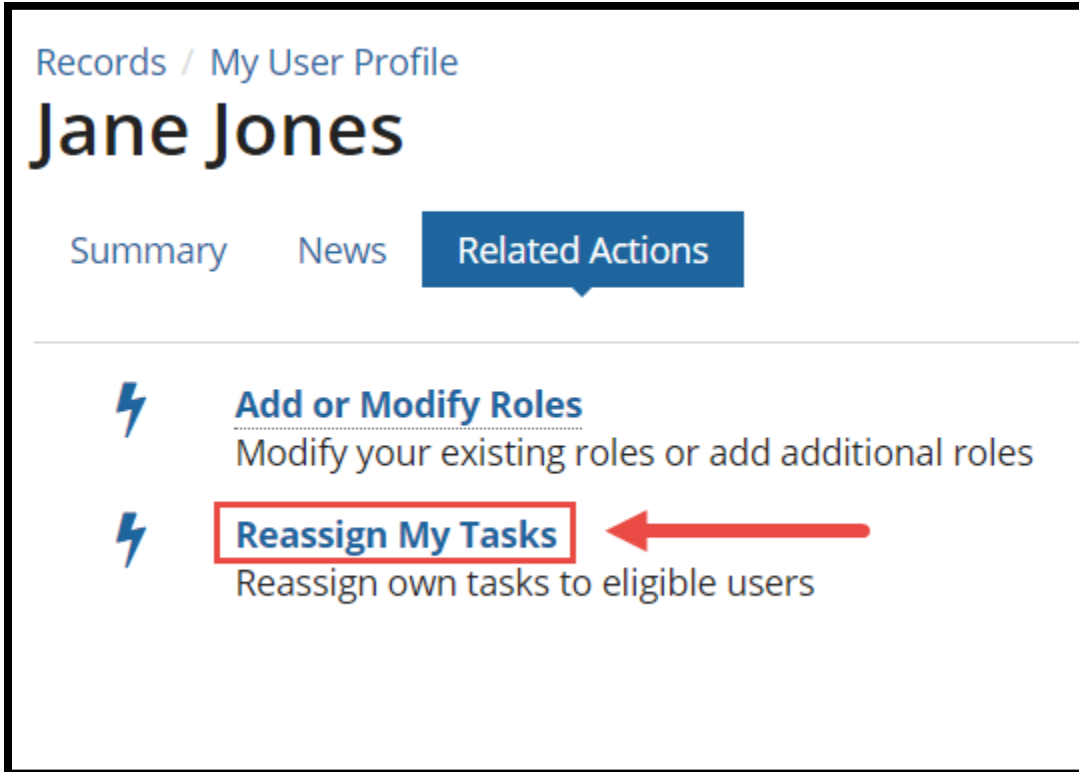
Figure 39: Reassign My Tasks link

5. Select a "**Component"** option, if applicable.
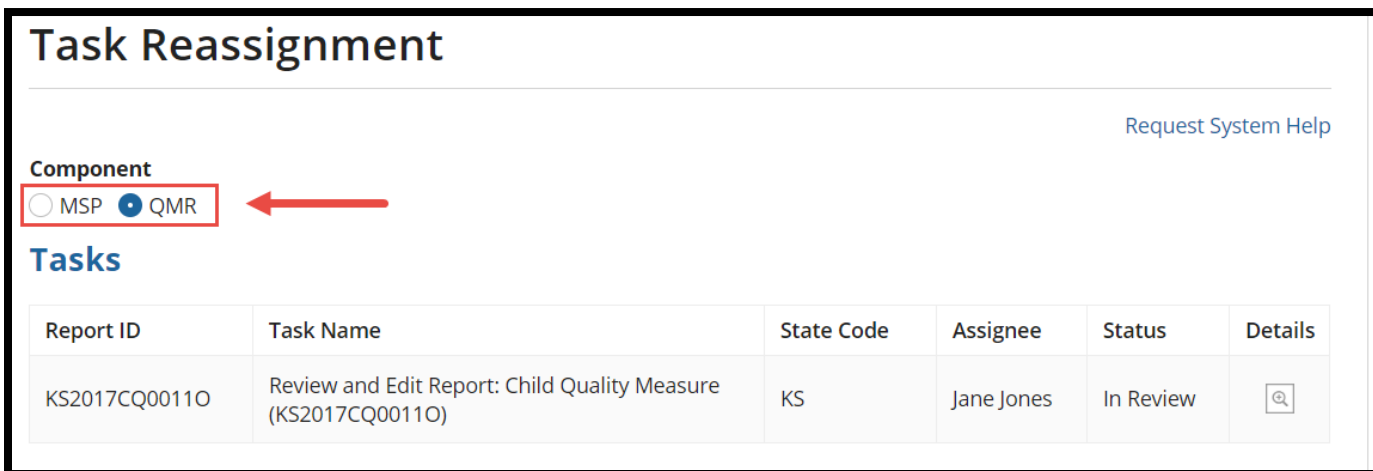
Figure 40: Component radio buttons

6. Select the icon under the "**Details**" column of the "**Tasks**" table for the applicable task.

Figure 41: View Details icon

7. Select the "**Get Available Assignees**" button under the "**Selected Tasks Details**" section.

Figure 42: Get Available Assignees button

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8. Select an Assignee from the "**New Assignee**" drop-down menu that appears.

Figure 43: New Assignee drop-down

9. Select the "**Reassign Task**" button in the bottom-right corner.

Figure 44: Reassign Task button

10. Select "**Yes**" to the confirmation prompt.
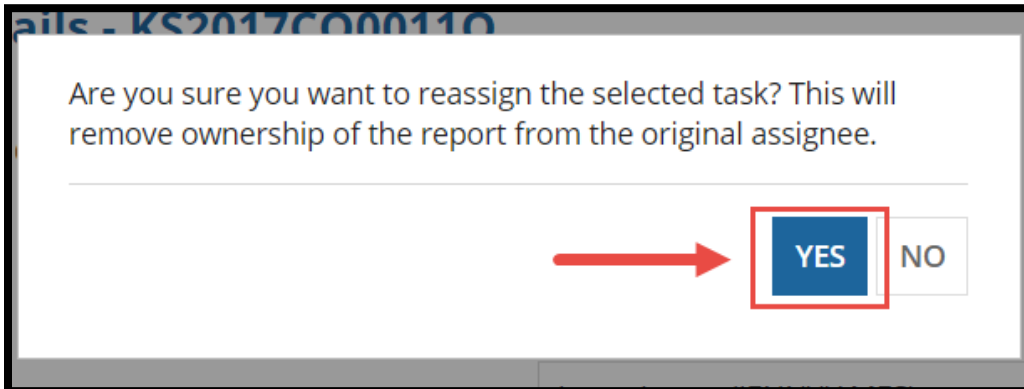
Figure 45: Yes button in Prompt

11. When the **Confirmation of Reassignment** screen appears, select either the "**Exit**" button or "**Return to Task Reassignment**" button to exit.

Figure 46: Confirmation of Reassignment screen

12. Once the task is reassigned, the task recipient will receive an email notification.

Following task has been re-assigned by Jane Jones

Task Information: Review and Edit Report: Child Quality Measure (KS2017CQ0011O)

- **Workstream:** QMR
- **State:** KS
- **Status:** In Review
- **Original Assignee:** Jane Jones (JANEJONES)
- **New Assignee:** Jenny James
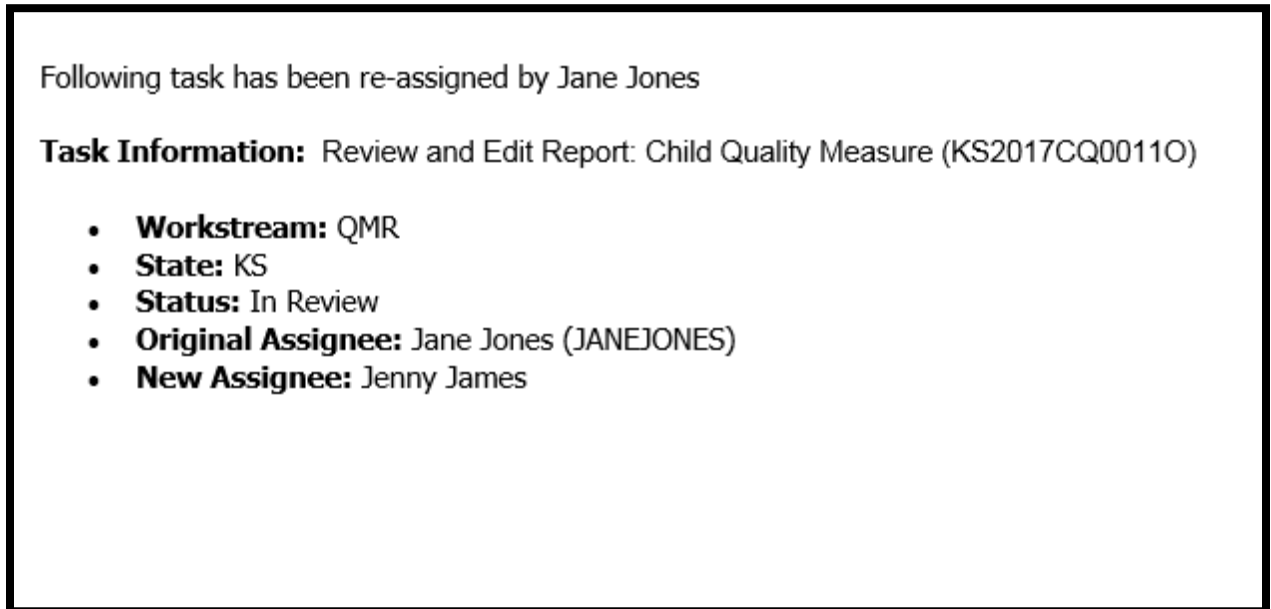
Figure 47: Task Reassignment notification

Administrator Users: Managing Users' Roles & Tasks

This section provides instructions for administrator users to approve or deny role requests and role removal requests. Steps on reassigning tasks for other roles are also included.

State Approval Hierarchy
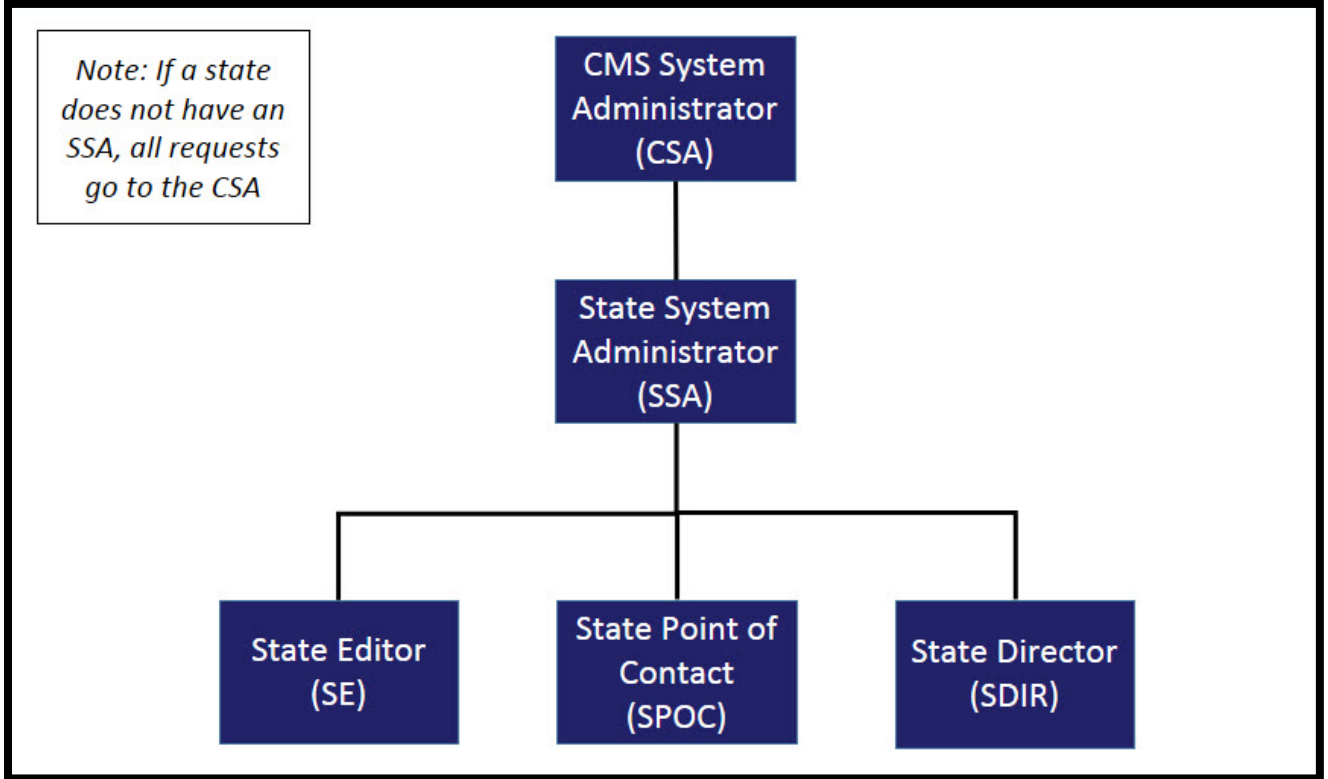
Figure 48: State Approval Hierarchy

CMS Approval Hierarchy
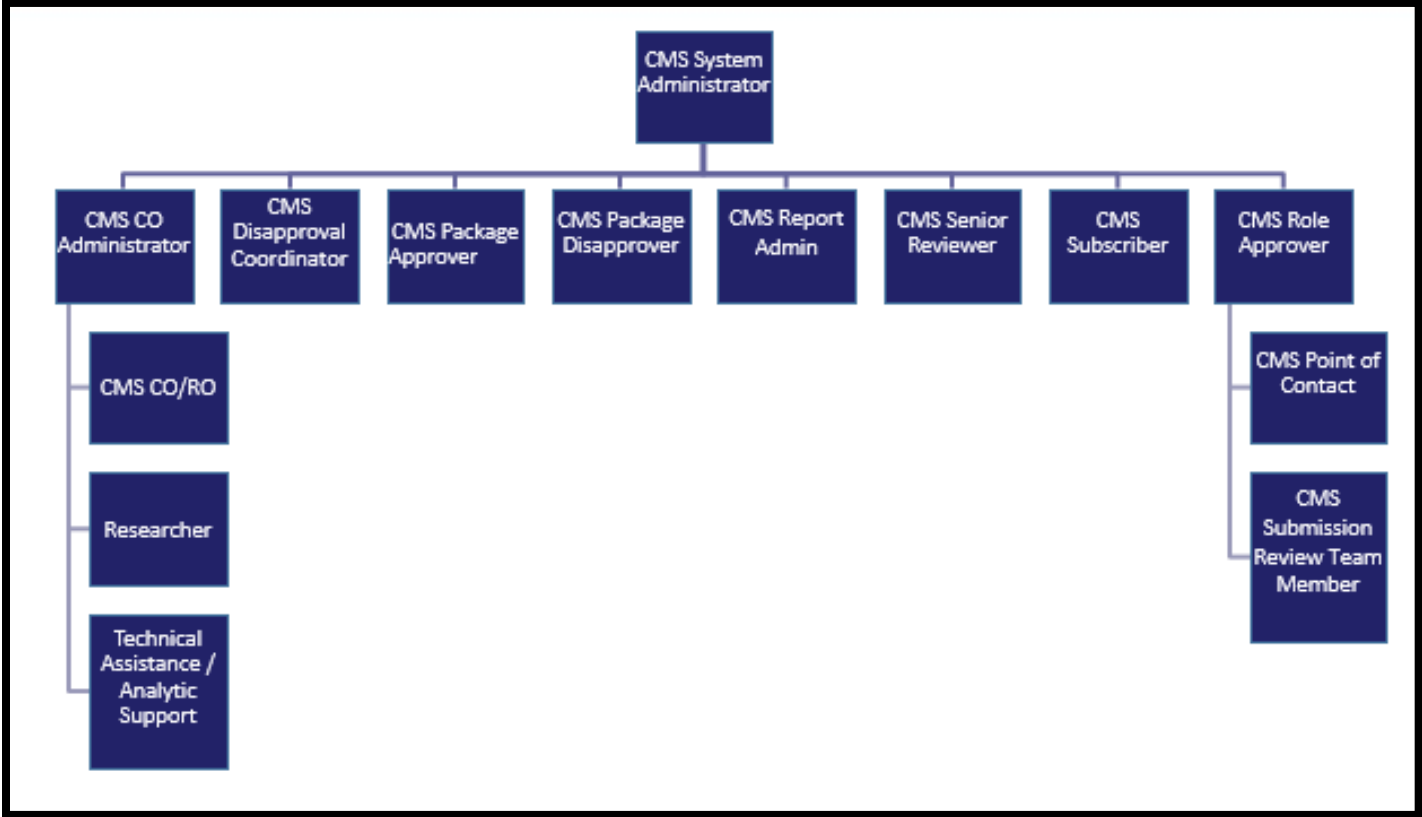
Figure 49: CMS Approval Hierarchy

Approving or Denying a Role Request

This section provides instructions on how administrator users can approve or deny a role request in MACPro. The following roles can approve or deny a role request in MACPro: CMS System Administrator (CSA), CMS Role Approver (CRA), CMS CO Administrator (CCA), and the State System Administrator (SSA).

1. When there is a new role request awaiting approval, eligible approvers will receive an email notification. At the end of each day, an additional notification will be sent to approvers if there is a request that no one has added to their queue. Access the request using one of the following two options:

    a. Click on the "**View Role Requests**" link in the email notification.
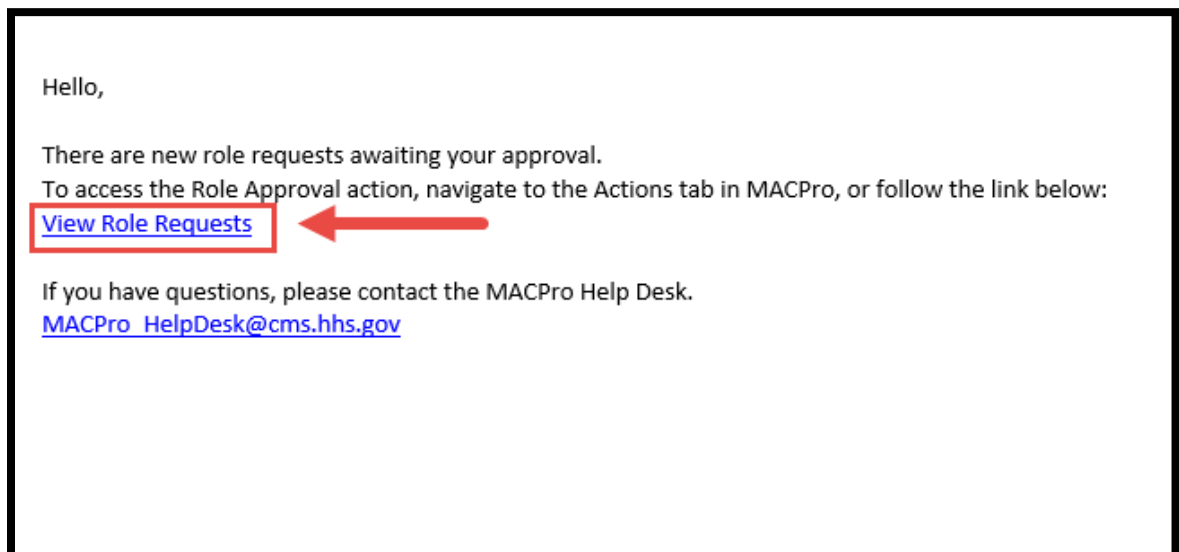
Figure 50: View Role Requests email link

b. Or select the **Actions** tab from the upper toolbar and select "**Role Request Management**."
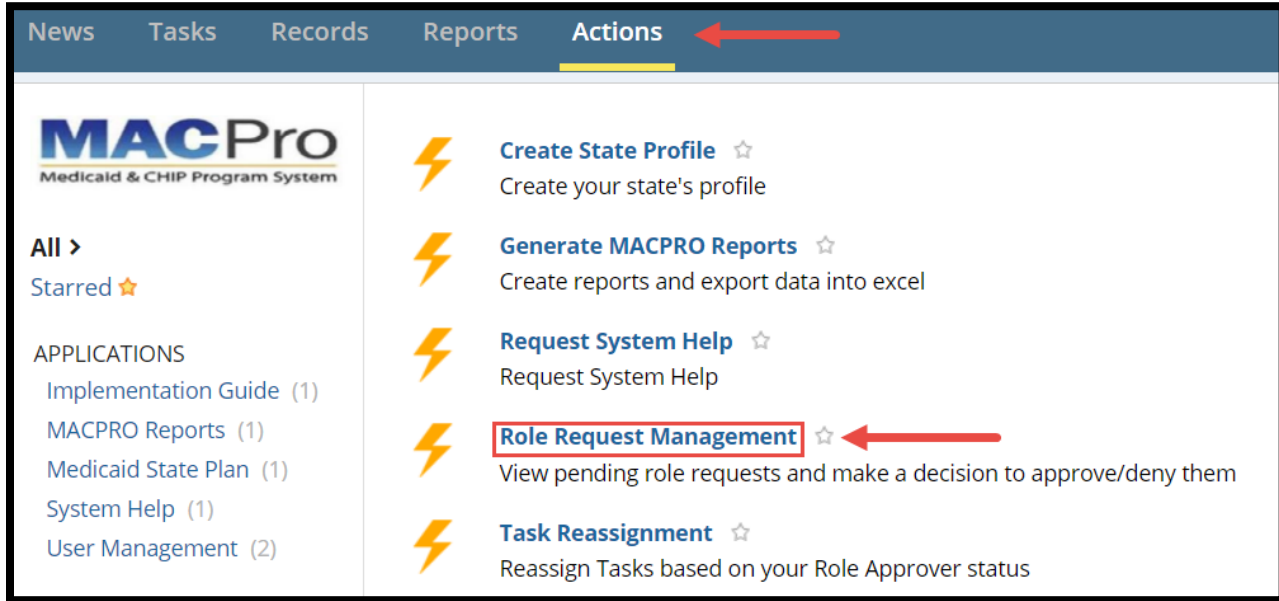
Figure 51: Role Request Management link

2. Select the checkbox next to all applicable requests under the "**All Pending Requests**" section. The All Pending Requests pool is visible to all eligible approvers. To approve a request, **one** approver must add the request(s) to their queue and remove it from the general pool.

   NOTE: A request to add a role will display a "**+**" icon under the "**Request Type**" column.
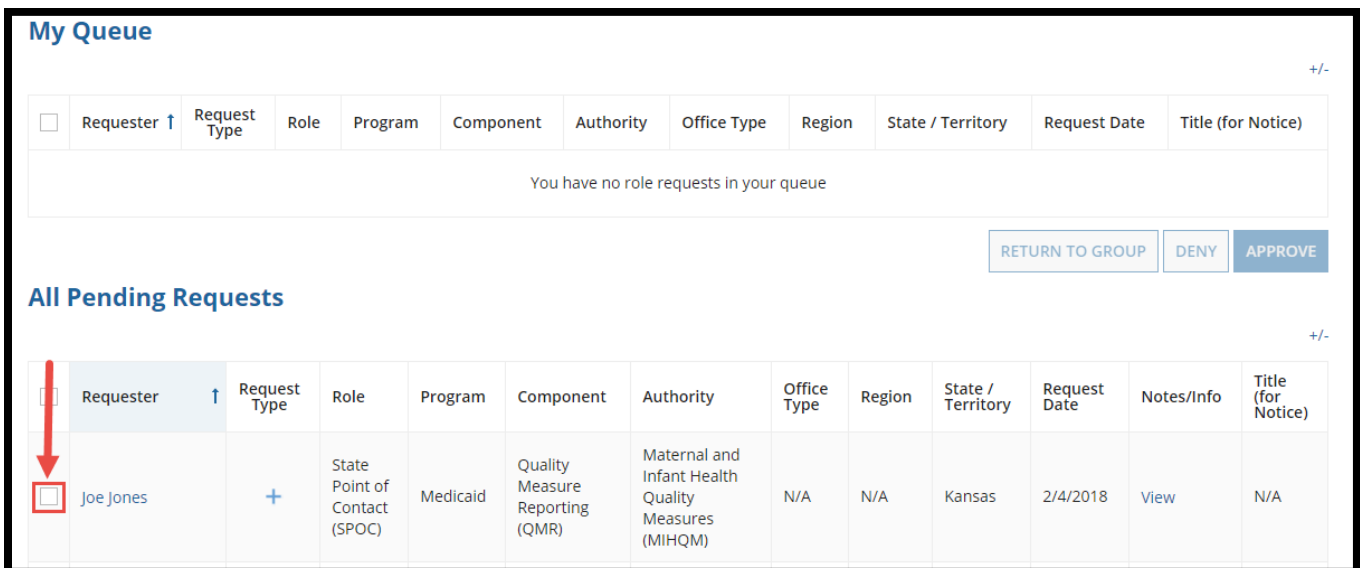
Figure 52: Role request checkbox

3. Select the "**Add to My Queue**" button. Once the request is placed in an approver's queue, no other role approver may act on the request.

   NOTE: If an approver has not acted on a role request in their queue by midnight the following day, it will be returned to the general pool.

Figure 53: Add to My Queue button

4. Select the checkboxes next to each applicable role request under the "**My Queue**" section.

Figure 54: Role request checkbox

5. Optional: Select the link in the "**Notes/Info**" column to provide any reviewer notes to the requester.

NOTE: Reviewer Notes will be shown in the email notification sent to the requester, as well as in the requester's News tab.

Figure 55: Reviewer Notes field

6. Select the checkbox next to the applicable role request and select "**Approve**" or "**Deny.**"

NOTE: At this step, users may choose to return the request to the group. If "**Return to Group**" is selected, it will remove the request from the queue and return to the general pool.
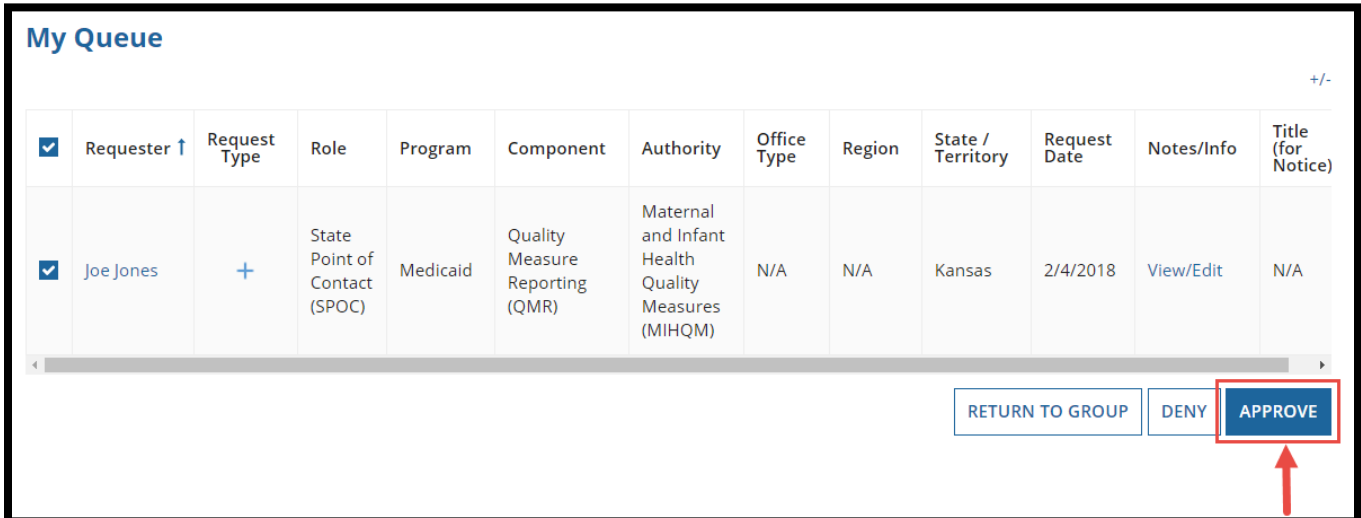
Figure 56: Approve button
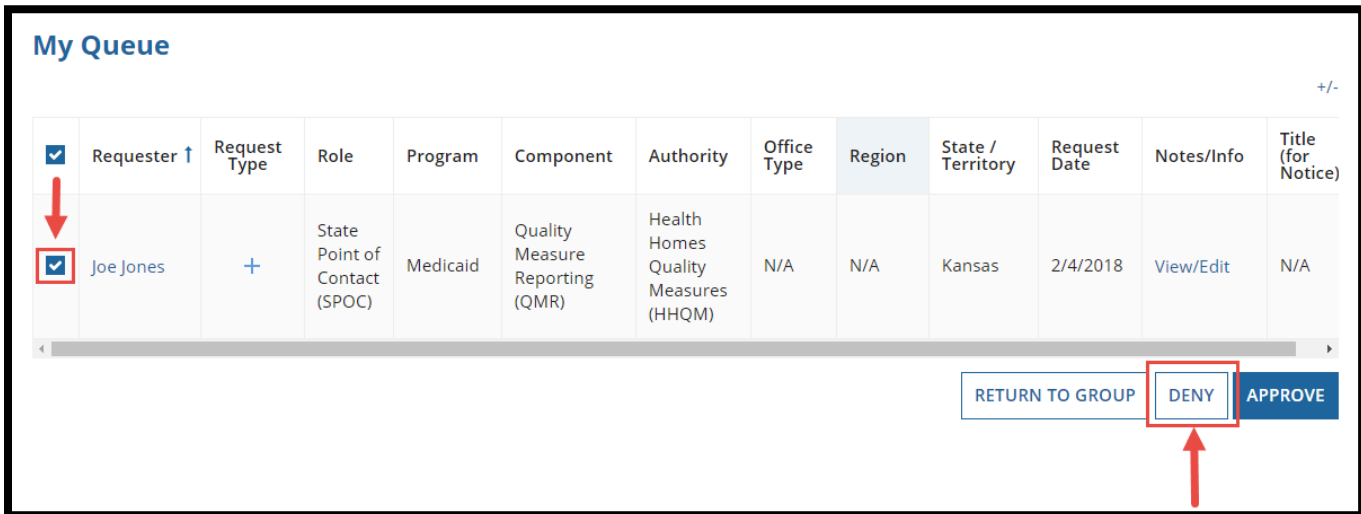
Figure 57: Role request checkbox and Deny button

7. Select "**Yes**" to the approval or denial confirmation prompt.
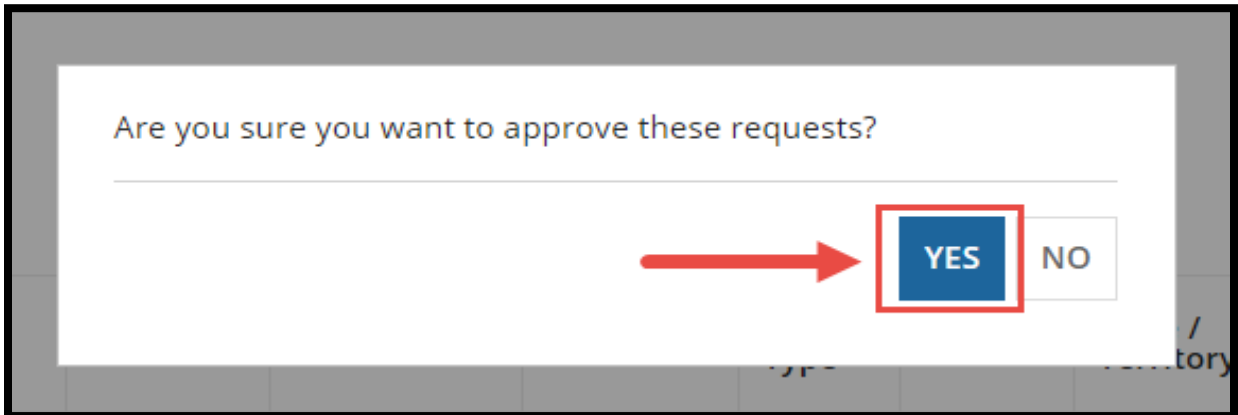
Figure 58: Yes button in Prompt
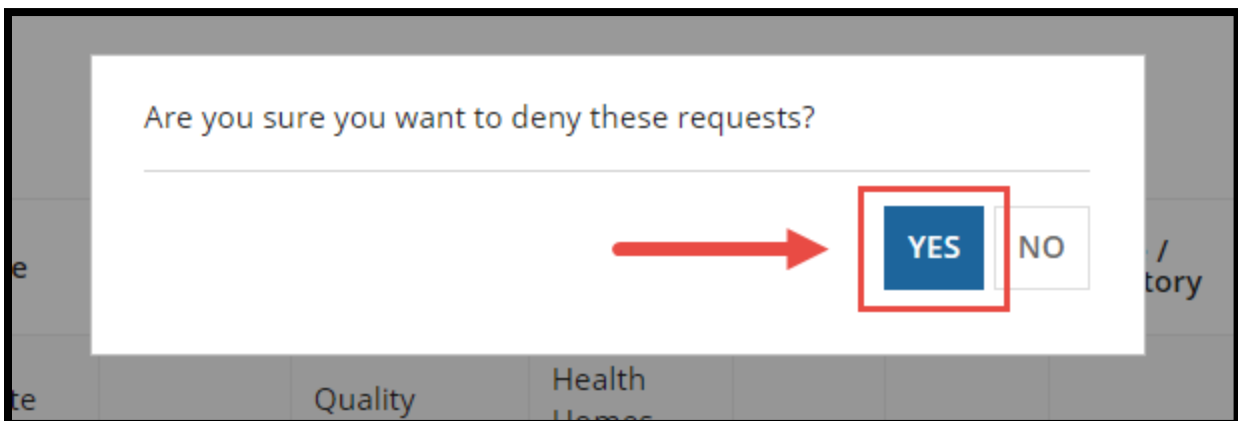
Figure 59: Yes button in Prompt

8. Select "**Continue**" on the action summary confirming the request approval or denial.

Figure 60: Continue button

Figure 61: Continue button

9. Once the role is approved or denied, an email notification will be sent to the requester.

Hello,

Your request for the following role has been Approved:

Request Type: New MACPro Role
Role Name: State Editor (SE)
Program: Medicaid
Component: Quality Measure Reporting (QMR)
Authority: Maternal and Infant Health Quality Measures (MIHQM)
Office Type: N/A
Region: N/A
State: Indiana

If you have questions, please contact the MACPro Help Desk.
MACPro_HelpDesk@cms.hhs.gov

Figure 62: Email notification for role approval

Hello,

Your request for the following role has been Denied:

Request Type: New MACPro Role
Role Name: State Point of Contact (SPOC)
Program: Medicaid
Component: Quality Measure Reporting (QMR)
Authority: Maternal and Infant Health Quality Measures (MIHQM)
Office Type: N/A
Region: N/A
State: Wisconsin

If you have questions, please contact the MACPro Help Desk.
MACPro_HelpDesk@cms.hhs.gov

Figure 63: Email notification for role denial

Approving/Denying a Role Removal Request

This section provides instructions for administrator users to approve or deny a role removal in MACPro. The following roles can approve or deny a role request in MACPro: CMS System Administrator (CSA), CMS Role Approver (CRA), CMS CO Admin (CCA), and the State System Administrator (SSA).

1. When there is a new role removal request awaiting approval, eligible approvers will receive an email notification. At the end of each day, an additional notification will be sent to approvers if there is a request that no one has added to their queue. Access the request using one of the following two options:

   a. Click on the "**View Role Requests**" link in the email.

Hello,

There are new role requests awaiting your approval.
To access the Role Approval action, navigate to the Actions tab in MACPro, or follow the link below:
View Role Requests

If you have questions, please contact the MACPro Help Desk.
MACPro_HelpDesk@cms.hhs.gov
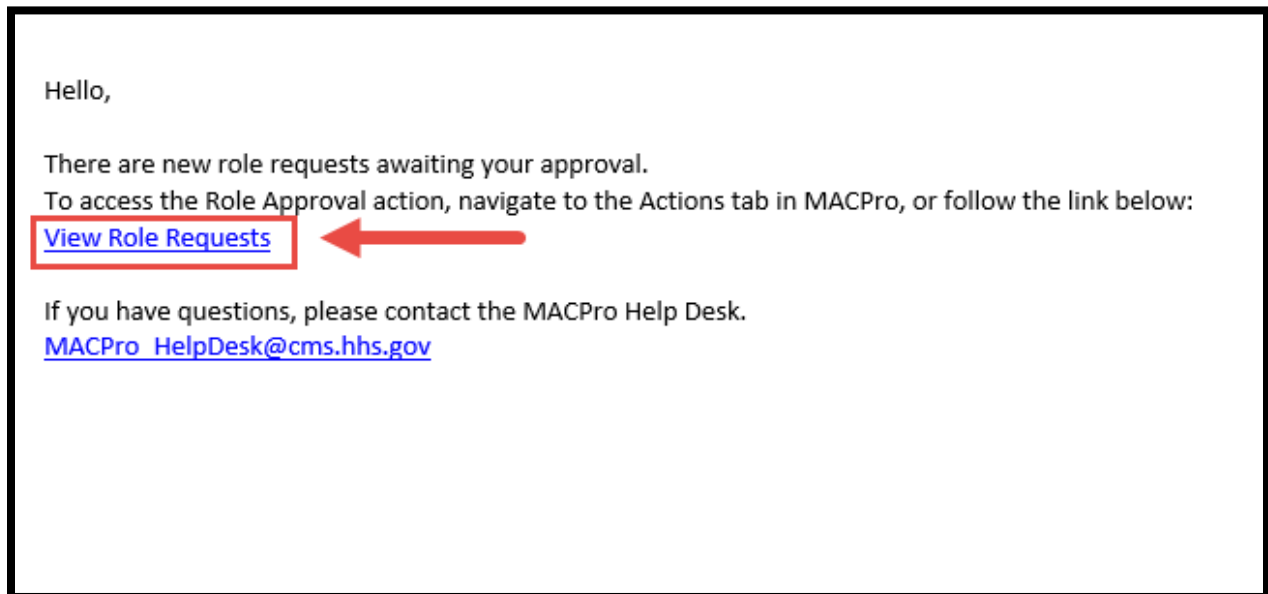
Figure 64: View Role Requests email link

b. Alternatively, select the **Actions** tab from the upper toolbar and select "**Role Request Management**."
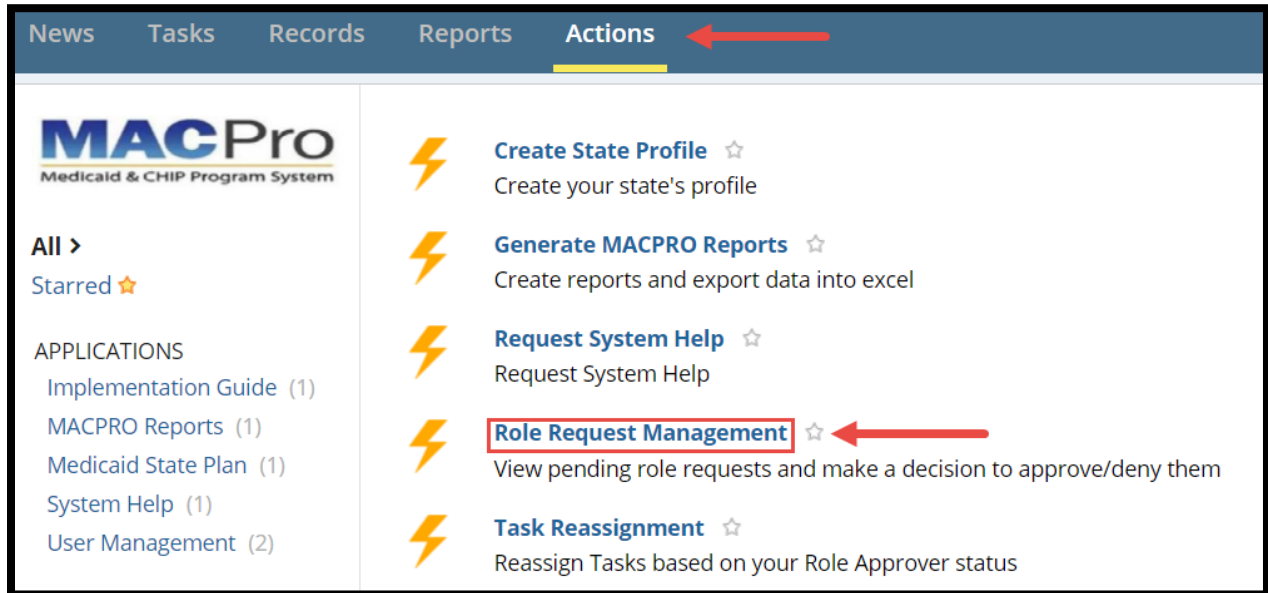
Figure 65: Role Request Management link

2. Select the checkbox next to all applicable requests under the "**All Pending Requests**" section. The All Pending Requests pool is visible to all eligible approvers. To approve a request**, one** approver must add the request(s) to their queue and remove it from the general pool.

NOTE: A request to remove a role will display a "**x**" icon under the "**Request Type**" column.
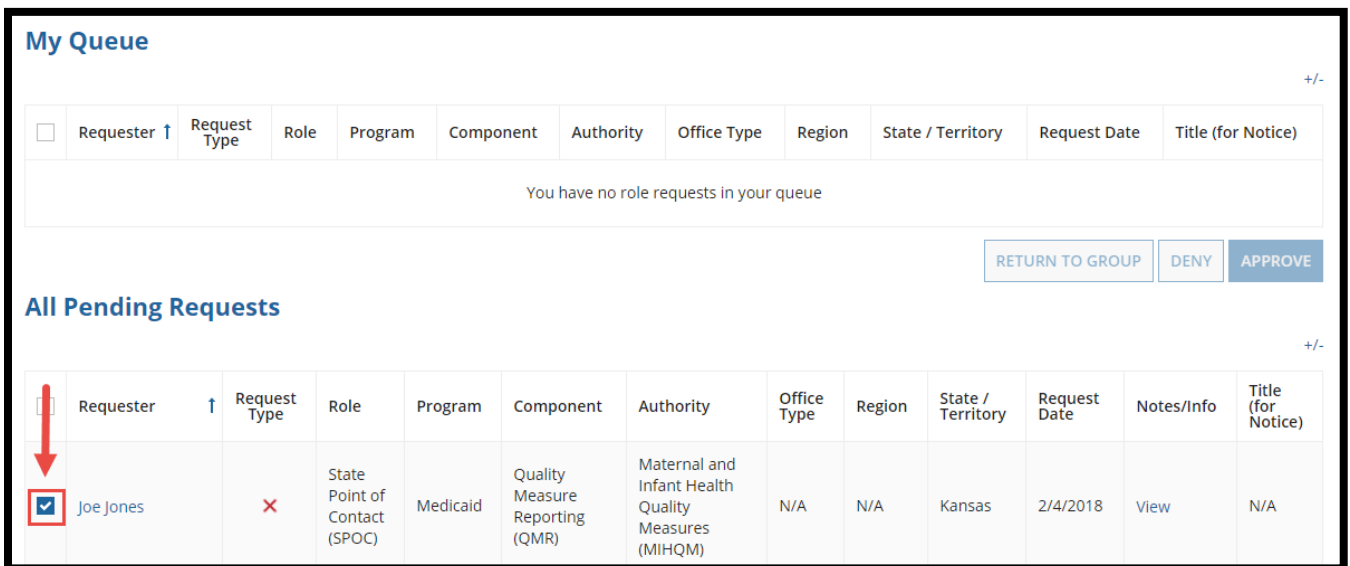
Figure 66: Role request checkbox

3. Select the "**Add to My Queue**" button. Once the request is placed in an approver's queue, no other role approver may act on the request.

   NOTE: If an approver has not acted on a role removal request in their queue by midnight the following day, it will be returned to the general pool.
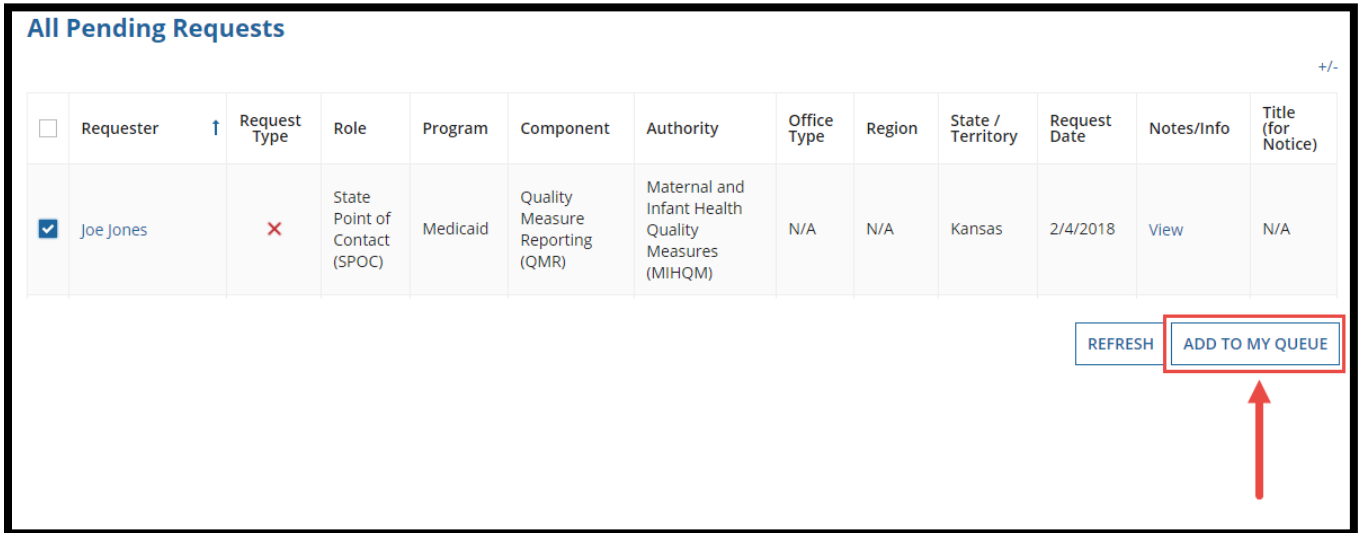
Figure 67: Add to My Queue button

4. Select the checkboxes next to each applicable role request under the "**My Queue**" section.
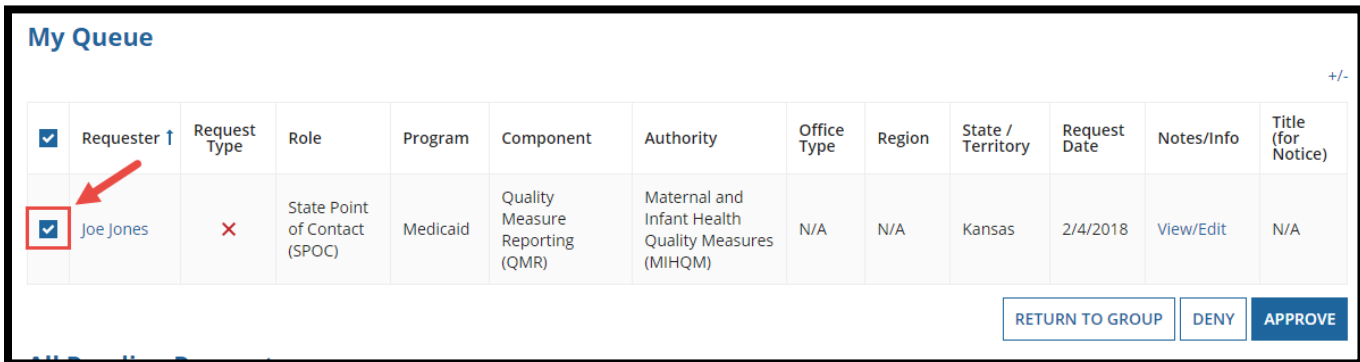
Figure 68: Role request checkbox

5. Optional**:** Select the link in the "**Notes/Info**" column to provide any reviewer notes to the requestor.

   NOTE: Reviewer Notes will be shown in the email notification sent to the requester, as well as in the requester's News tab.

☑	Requester ↑	Request Type	Role	Program	Component	Authority	Office Type	Region	State / Territory	Request Date	Notes/Info	Title (for Notice)
☑	Joe Jones	✕	State Point of Contact (SPOC)	Medicaid	Quality Measure Reporting (QMR)	Maternal and Infant Health Quality Measures (MIHQM)	N/A	N/A	Kansas	2/4/2018	Hide	N/A

Reviewer Notes ←

Character count: 0/4000

Role Name
State Point of Contact (SPOC)

Role Description
* Serves as the primary contact for all state submissions
* Reviews and may update submission package content
* Submits Draft and Official submission packages
* Documents and reviews correspondence log entries
* Responds to the RAI/SMI

Requester Notes
None

Figure 69: Reviewer Notes field

6. Select the checkbox next to the applicable role request and select "**Approve**" or "**Deny.**"

   NOTE: At this step, the user may choose to return the request to the group. If the "**Return to Group**" is selected, it will remove the request from the queue and return to the general pool.

Figure 70: Role request checkbox and Approve button

Figure 71: Role request checkbox and Deny button

7. Select "**Yes**" to the approval or denial confirmation prompt.
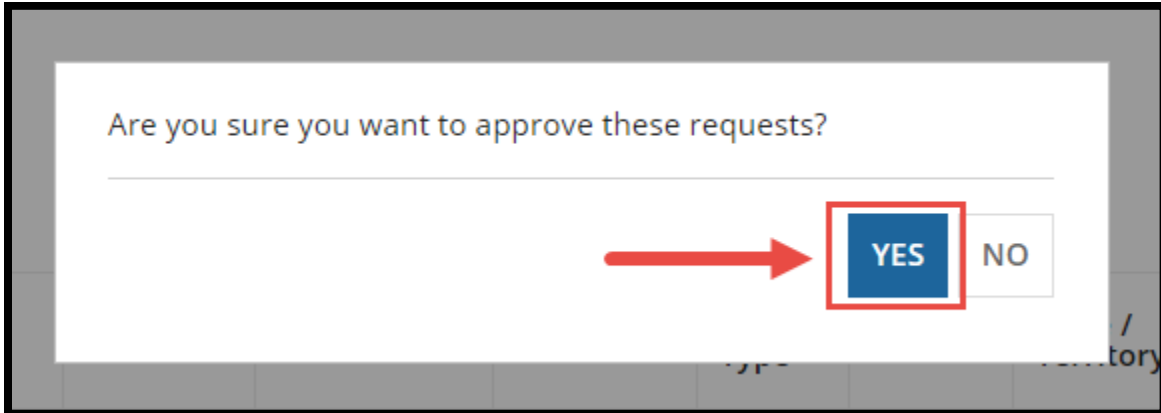
Figure 72: Yes button in Prompt
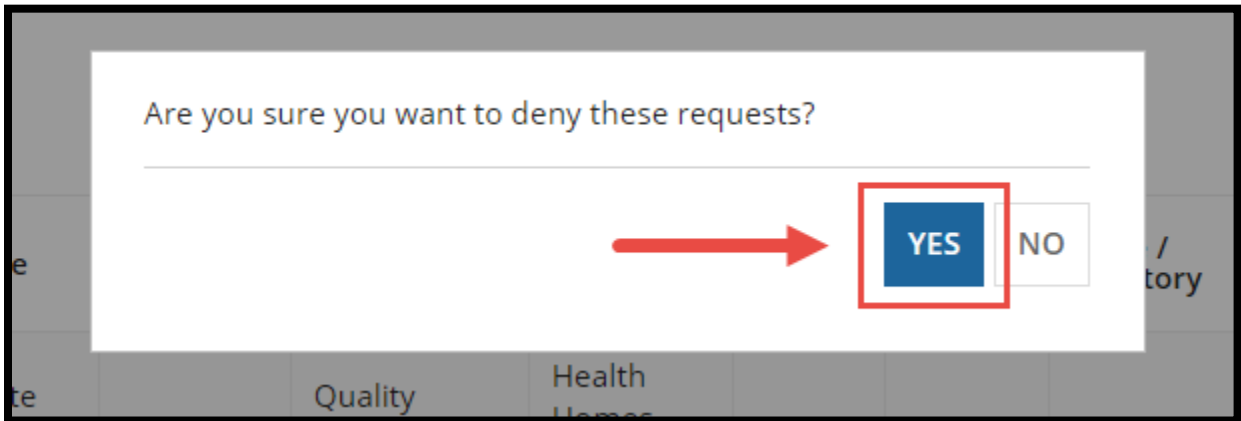
Figure 73: Yes button in Prompt

8. Select "**Continue**" on the action summary confirming the request approval or denial.

Figure 74: Continue button

Figure 75: Continue button

9. Once the role removal request is approved or denied, an email notification will be sent to the requester, including the approver's notes.

Hello,

Your request for the following role has been Approved:

Request Type: New MACPro Role
Role Name: State Editor (SE)
Program: Medicaid
Component: Quality Measure Reporting (QMR)
Authority: Maternal and Infant Health Quality Measures (MIHQM)
Office Type: N/A
Region: N/A
State: Indiana

If you have questions, please contact the MACPro Help Desk.
MACPro_HelpDesk@cms.hhs.gov

Figure 76: Email notification for role approval

Hello,

Your request for the following role has been Denied:

Request Type: MACPro Role Removal
Role Name: State Director (SDIR)
Program: Medicaid
Component: Medicaid State Plan (MSP)
Authority: All
Office Type: N/A
Region: N/A
State: Missouri

If you have questions, please contact the MACPro Help Desk.
MACPro_HelpDesk@cms.hhs.gov

Figure 77: Email notification for role denial

Reassigning Users' Tasks

This section provides instructions for administrator users or Senior Reviewers to reassign tasks for other users. The following roles can reassign a task on behalf of other users in MACPro: CMS System Administrator (CSA), CMS Role Approver (CRA), CMS CO Admin (CCA), Senior Reviewer, and the State System Administrator (SSA).

1. Select the **Actions** tab and then select "**Task Reassignment**."
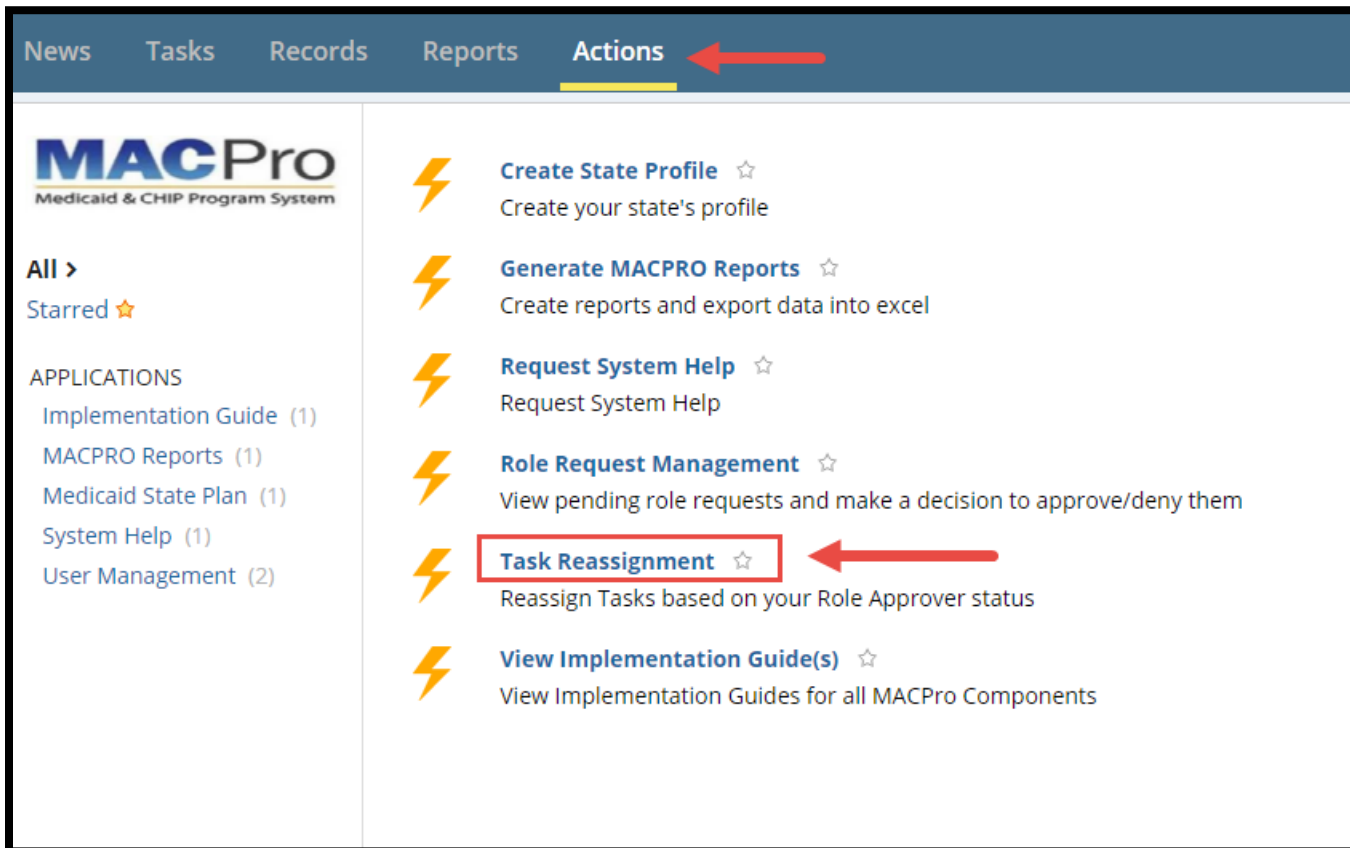
Figure 78: Task Reassignment link

2. Search for the applicable task by using the available "**Filters**".

Figure 79: Filters section

3. All tasks held by users managed by the admin role will appear in a table. Select the icon under the "**Details**" column to view a task.

   NOTE: This list may differ based on the administrator or approver role. All requests are routed based on certain matching attributes.

Figure 80: View Details icon

4. Select the "**Get Available Assignees**" button under the "**Selected Tasks Details**" section.

Figure 81: Get Available Assignees button

5. Select an assignee from the "**New Assignee**" drop-down menu that appears.

Figure 82: New Assignee drop-down

6. Select "**Reassign Task**" in the bottom-right corner.

Figure 83: Reassign Task button

7. Select "**Yes**" in the confirmation prompt.
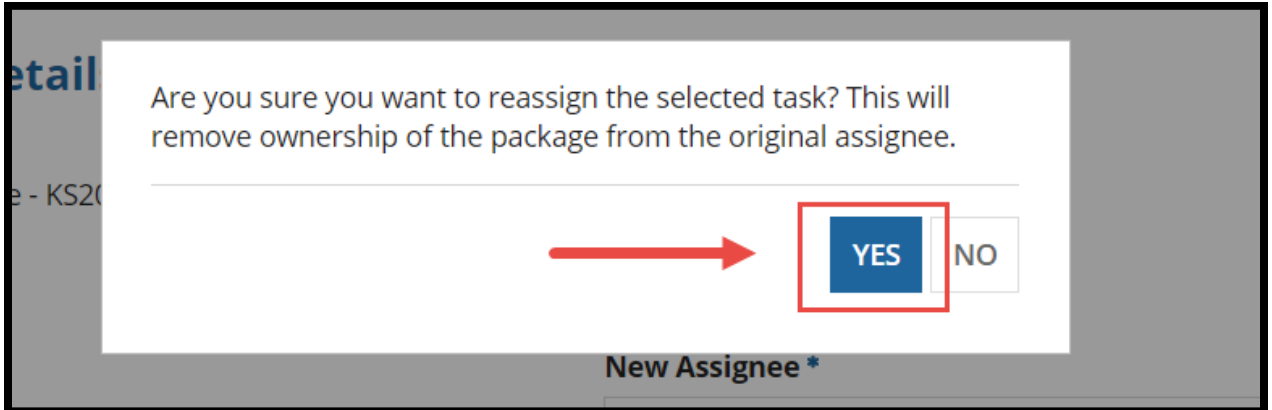
Figure 84: Yes button in prompt

8. When the **Confirmation of Reassignment** screen appears, select either the "**Exit**" button or "**Return to Task Reassignment**" button to exit.

Confirmation of Reassignment
The following task has been successfully reassigned.

Task Name
Review Submission Package - KS2018MS0001O - (KS-17-4688-a)

Original Assignee
Jane Jones

New Assignee
Jenny James

EXIT   BACK TO TASK REASSIGNMENT
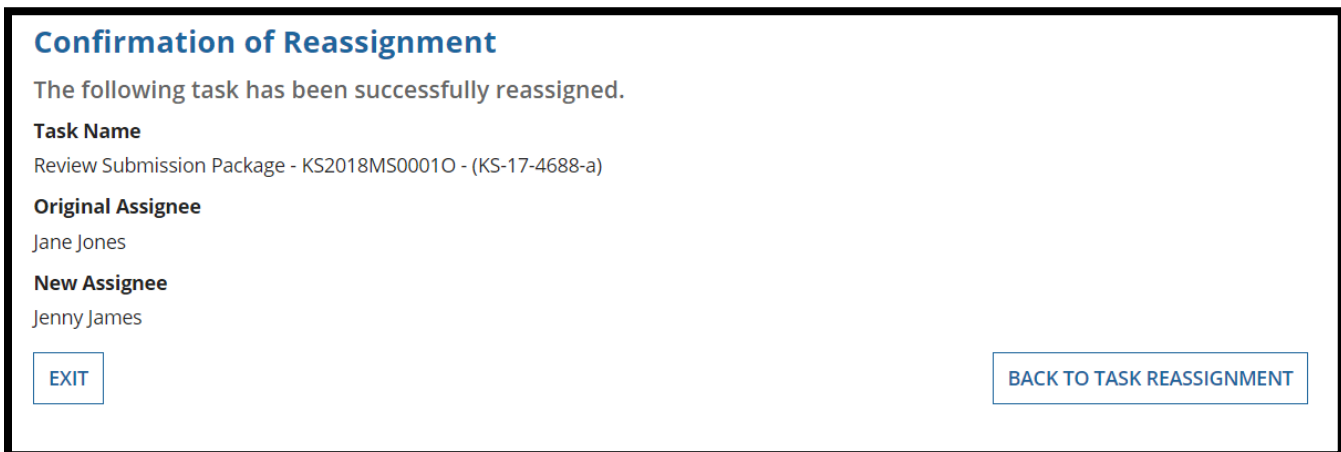
Figure 85: Confirmation of Reassignment screen

Appendix

The appendix contains instructions on additional actions users may take in MACPro.

Glossary

This table provides common terms used throughout this document along with their definitions.

Term	Definition
Attribute	Describes the various access a user role has. Attributes include Program, Component, Authority, Region, State/Territory, and Office Type.
Authority	The section within a Component. Under the Components of Quality Measures (QMR) or Medicaid State Plan (MSP), there are various Authorities such as Adult Quality Measure, Medicaid and CHIP Child Quality Measures, Health Homes SPA, MAGI Eligibility, or Administration.
Component	Describes a program section available within MACPro. The two Components currently available in MACPro are Quality Measures Reporting and Medicaid State Plan.
Deactivation	The act of revoking a user's access to MACPro. Users cannot complete this action themselves and must contact the MACPro Help Desk for further guidance.
Program	Section of MACPro that designates what the user is reporting on. Available Programs are CHIP or Medicaid. Users can select various Components and Authorities under a Program.
Role Removal	The feature in MACPro that allows users to request to remove a current role from their user profile in MACPro while remaining active in the system.
Task Reassignment	The feature of MACPro that allows specific users to reassign an accepted task to another user. This feature also allows certain roles holding administration and approver capabilities to reassign tasks on behalf of other users.
User Management	The section of MACPro that includes all features related to roles and administration. This includes role requesting, role removal, approving or denying role requests or role removal requests, self-task reassignment, and task reassignment for users.
User Profile	The section of MACPro that includes all information related to the user information, roles, and attributes. The user information included in the user profile is populated from EIDM.

Adding Front Line Manager

Adding a Front Line Manager is an action for CMS Users only. The Front Line Manager field is for records purposes and does not have an impact on who approves a CMS user role within MACPro.

NOTE: CMS Users are required to enter a Front Line Manager before requesting a role.

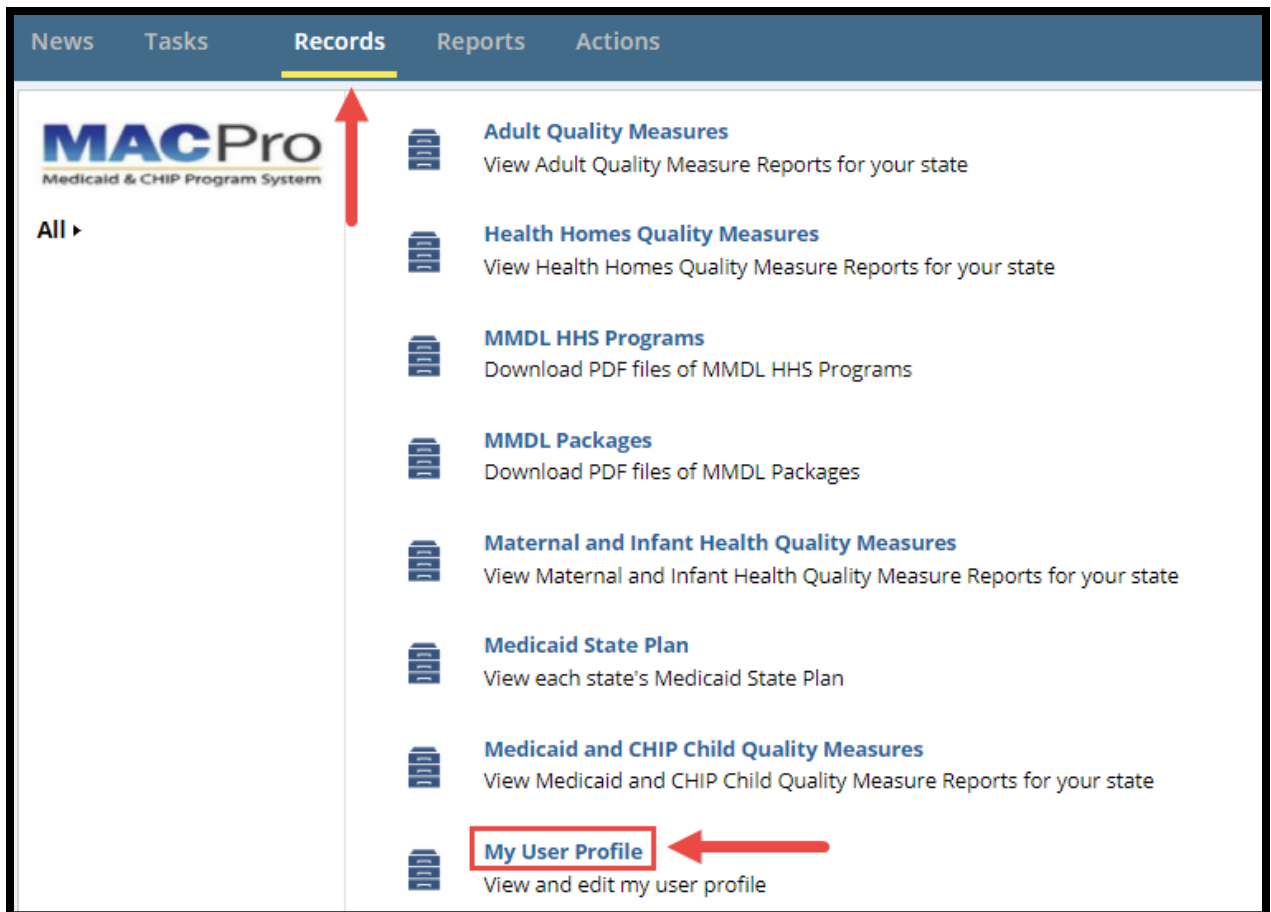1. Select the "**Records**" tab from the upper toolbar and select "**My User Profile**."

Figure 86: My User Profile link

2. Select your **name**.

Figure 87: Username link

3. Select the "**Edit Front Line Manager**" button in the upper-right corner.
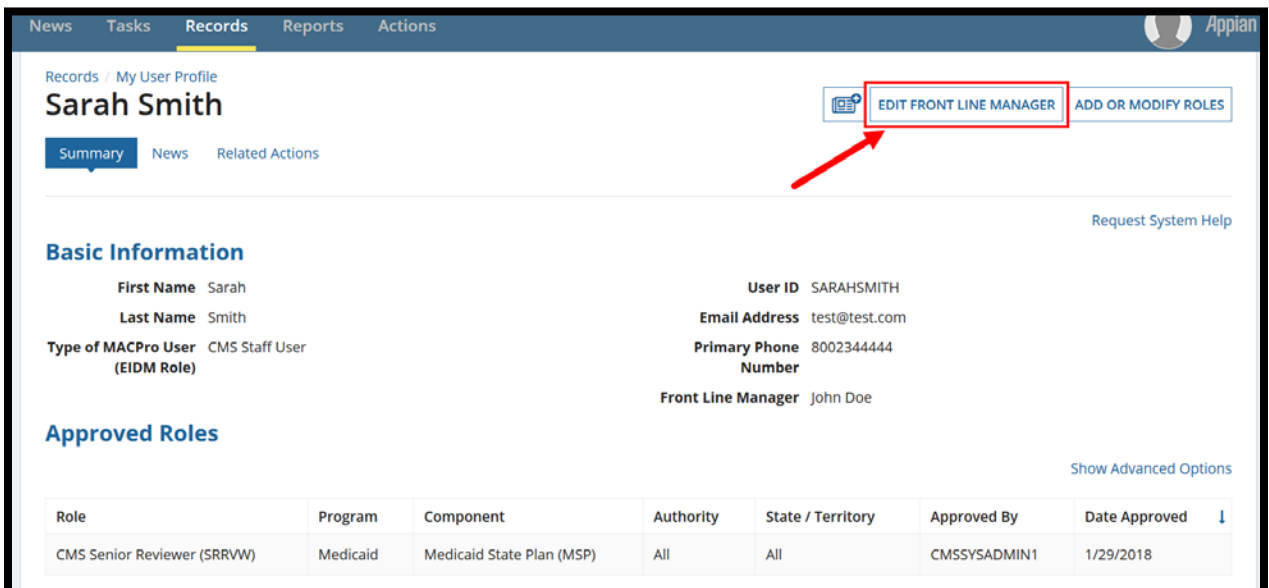
Figure 88: Edit Front Line Manager button

a. Alternatively, select "**Related Actions**" from the profile toolbar and select "**Edit Front Line Manager**".
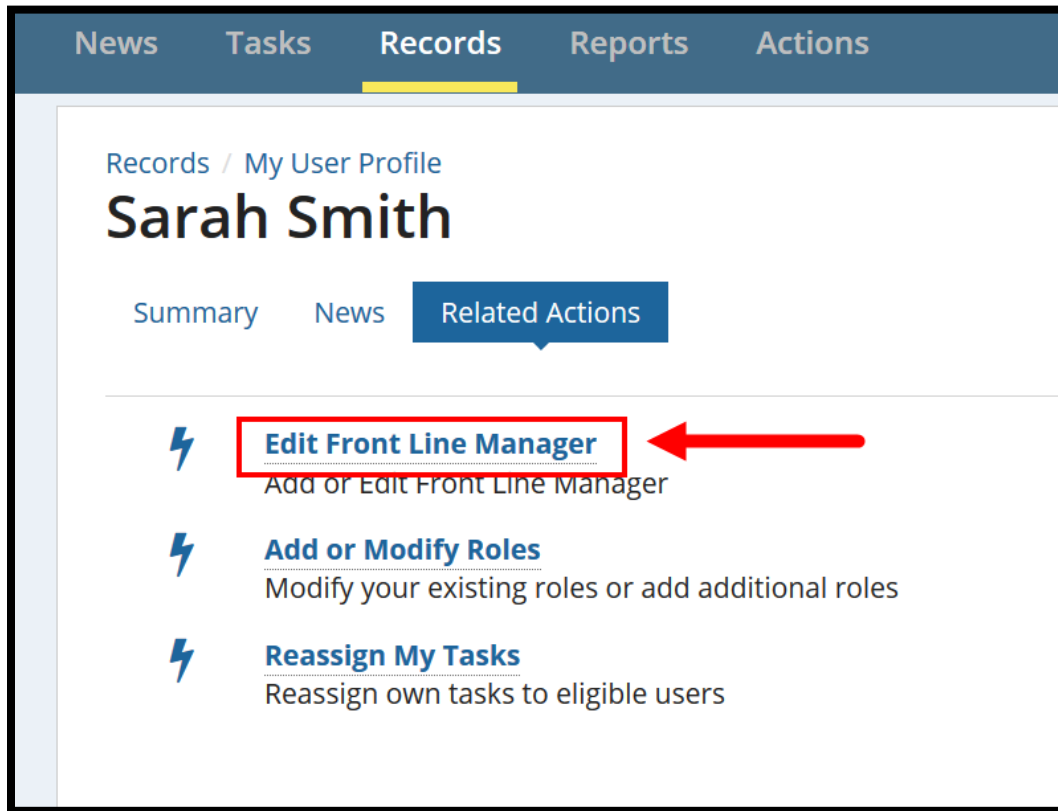
Figure 89: Edit Front Line Manager link

4. Enter the Front Line Manager's First and Last Name in the appropriate text boxes. Select "**Submit**."
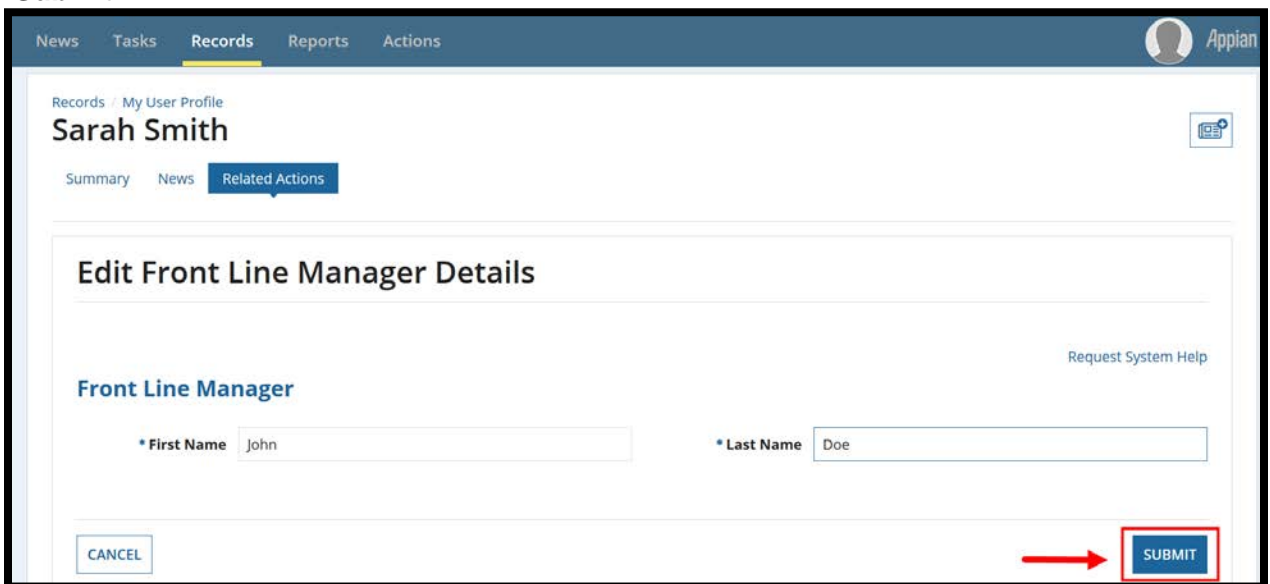
Figure 90: Submit button

5. Edits made to the Front Line Manager field will be reflected in the user profile.

Figure 91: Front Line Manager listed under Records tab Summary view

6. If a CMS user attempts to request a role before the Front Line Manager has been captured, a validation error will appear.

Figure 92: Validation error

Viewing Your User Profile

This section provides instructions on how to view your MACPro User Profile.

1. Select the "**Records"** tab from the upper toolbar and select "**My User Profile**."
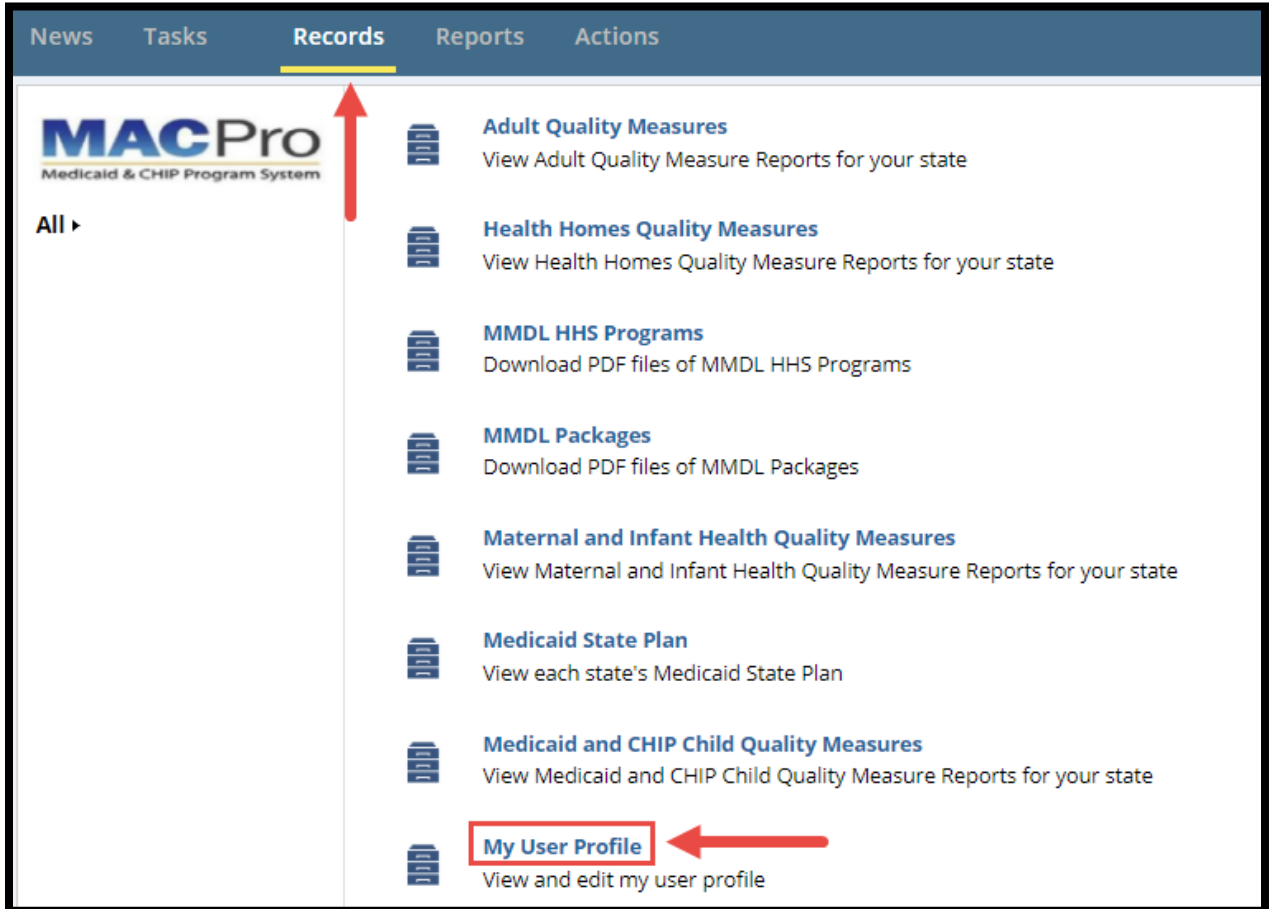
Figure 93: My User Profile link

2. Select your **Name**.

Figure 94: Username link

3. On this page, Basic Information including First Name, Last Name, Type of MACPro User (EIDM Role), User ID, Email Address, Phone Number, and Front Line Manager (CMS Users only) will populate. A list of Approved Roles in a table will also populate.

Figure 95: User Profile page

4. Select "**Show Advanced Options**" to customize the view of approved roles.

Figure 96: Show Advanced Options link

5. Check the boxes next to the column titles to show in the Approved Roles table. Available items are State/Territory, Program, Component, Authority, Region, Office Type, Approved By, Date Approved, and Title (for notice).

Figure 97: Approved Roles section with checkbox options

Viewing Other User Profiles

This section provides instructions on how to view the user profiles of other users in MACPro. The following roles can view other profiles:

Role	Ability to view CMS User Profiles	Ability to view State User Profiles
CMS System Administrator	Yes	Yes
CMS Role Approver	Yes	No
CMS CO Administrator	Yes	No
State System Administrator	No	Yes

1. Select the **Records** tab from the upper toolbar and select "**My User Profile.**"
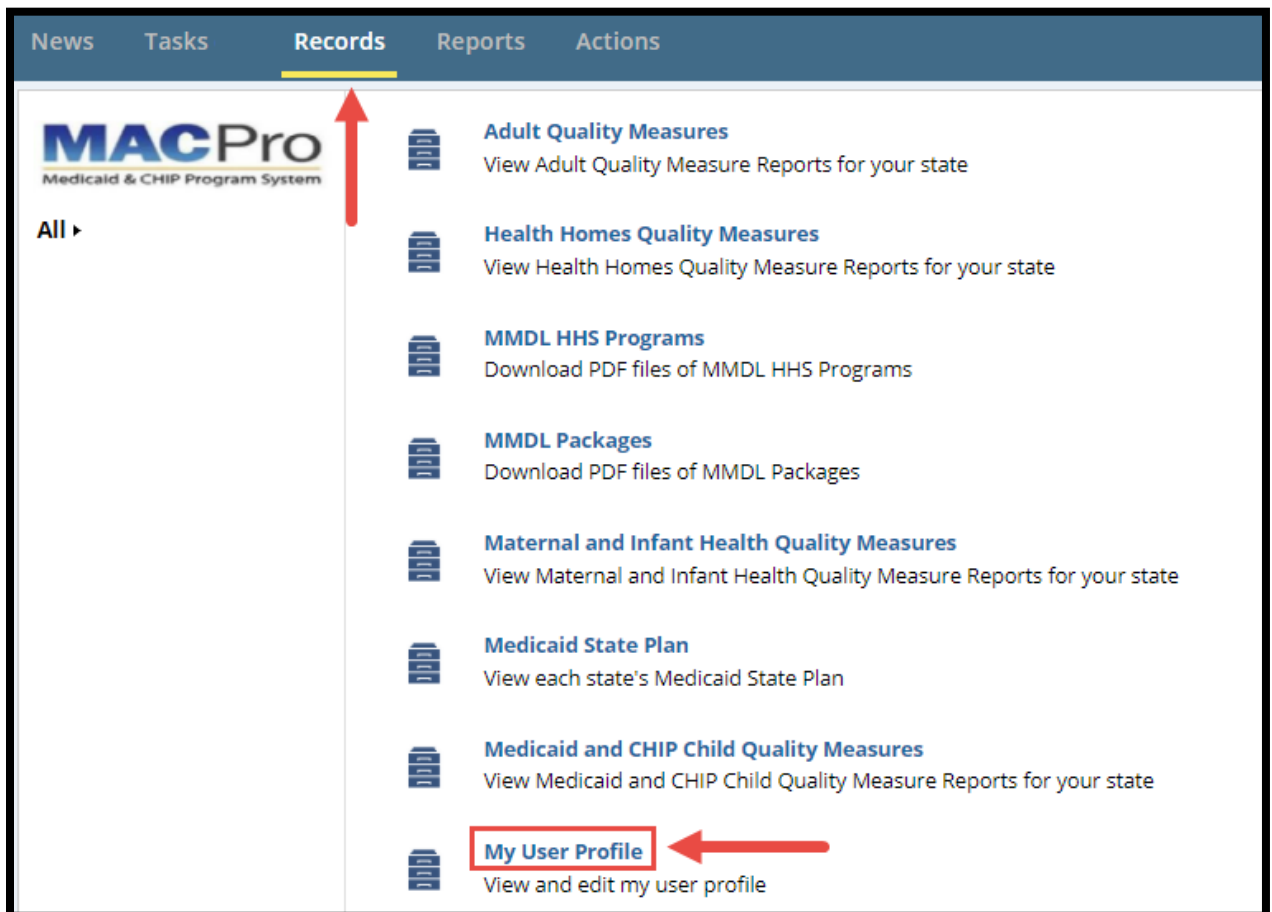
Figure 98: My User Profile link under the Records tab

2. Select your **name**.

Figure 99: Username link

3. Select "**User Profile Search**" from the profile toolbar.
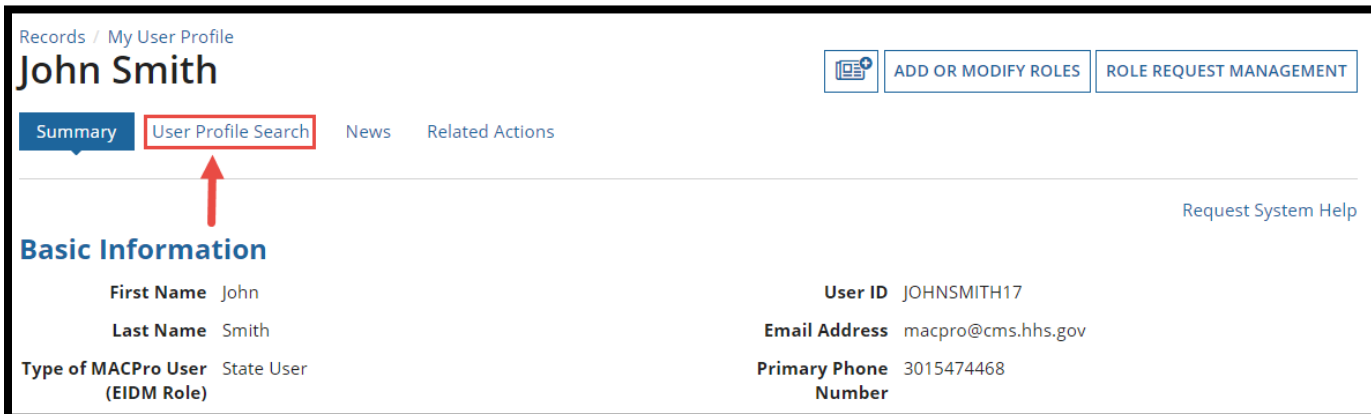
Figure 100: User Profile Search link

a. Alternatively, if on the Role Request Management screen, select the "**User Profile Search**" link from the upper-right corner.
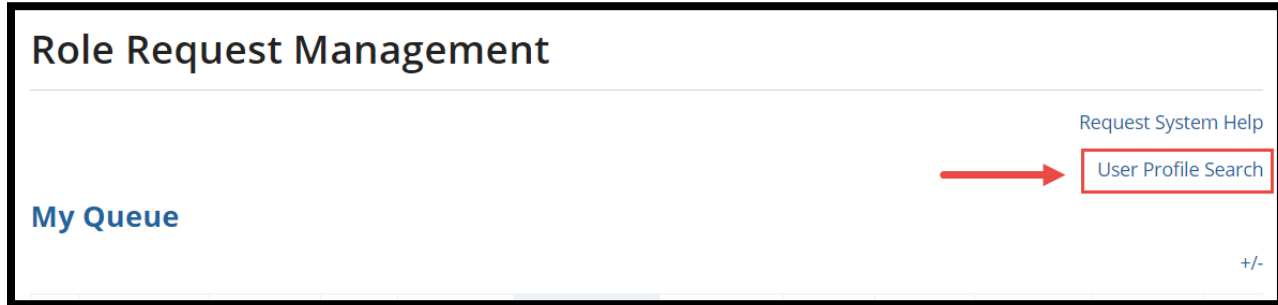
Figure 101: User Profile Search link

4. There are three different filter views available: "**Filter By User**", "**Filter By Role**", and "**View All Users**". In the "**Filter By User**" view, the user can search for any user in the system by First Name, Last Name, or Username. A list of users matching this search criterion will appear in a table below.
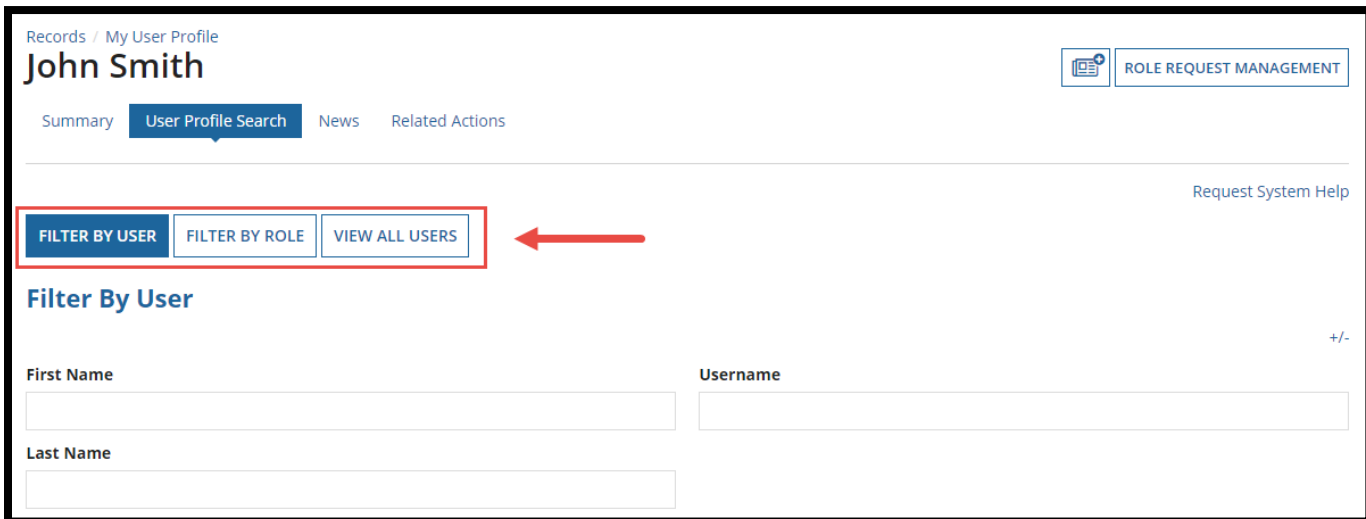
Figure 102: User Profile Search buttons to filter views

5. To view a user's profile, select the Username in the "**Username**" column.

Figure 103: Username link

6. After selecting a username, the user's **Basic Information** and **Approved Roles** will appear.

Figure 104: User Profile page

7. Select "**Show Advanced Options**," to customize the view of the user's approved roles.

Figure 105: Show Advanced Options link

8. Check the boxes next to the column titles to show in the Approved Roles table. Available items are: State/Territory, Program, Component, Authority, Region, Office Type, Approved By, Date Approved, and Title (for notice).

Figure 106: Approved Roles section with checkbox options

9. Select the "**Filter By Role**" view to filter by EIDM Role or by MACPro user roles using the drop-down menu. After selecting "**Filter By Role**", repeat steps 5-8 in this section to view a user's approved roles.

   NOTE: State System Administrators can only view the State User EIDM role.
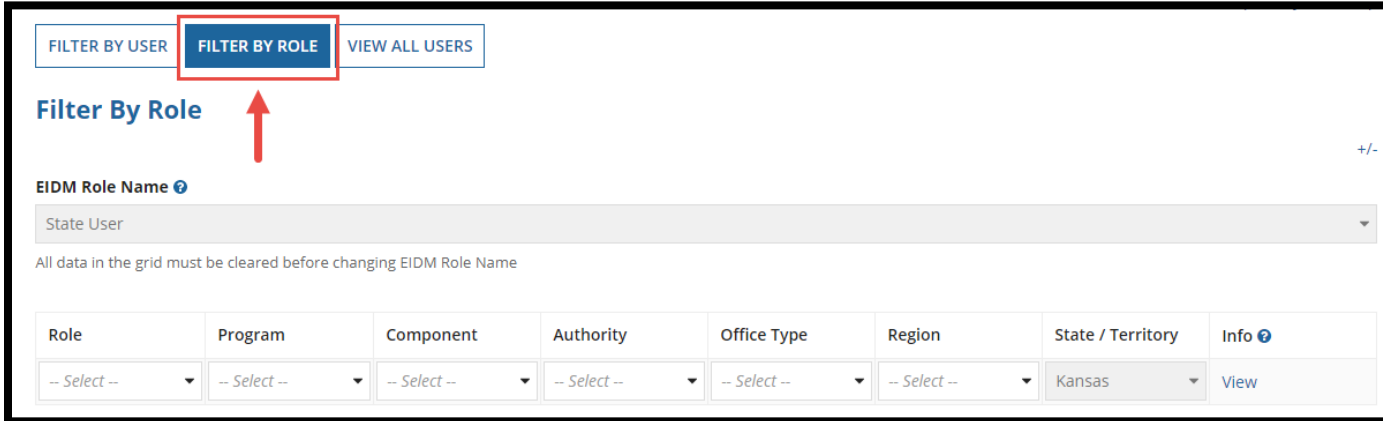

Figure 107: Filter By Role button

10. Select the "**View All Users**" button to display a table with all eligible users.
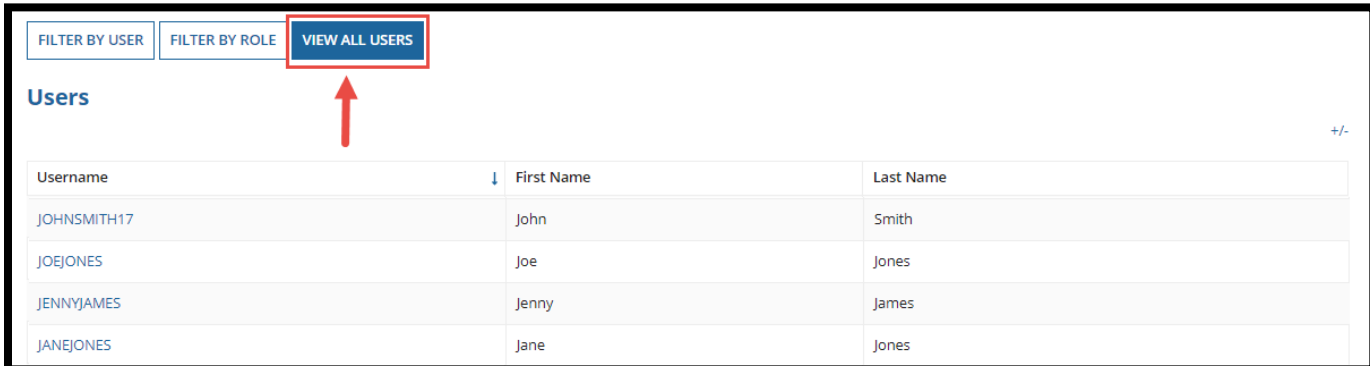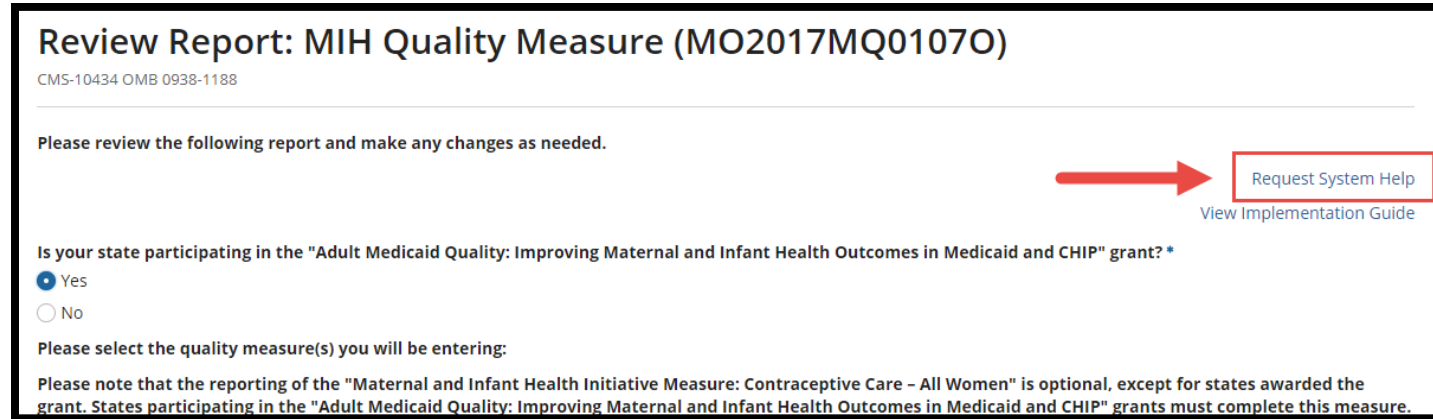

Figure 108: View All Users button

Request System Help (System-Related Inquiries)

The **Request System Help** link is easily available for MACPro system-related inquiries. The link is located on every page of a report or package. It is also listed as an action under the **Actions** tab. Should you need system-related assistance at any point when navigating MACPro, just click the link in the upper-right corner of the screen.

Figure 109: Request System Help link

A form will open in a new tab to avoid interrupting work in MACPro. Complete all required fields (marked by asterisks) and then select "**Submit Help Request**". Once the form is submitted, the MACPro Help Desk will receive an email with the information included in the form. To help expedite a response to your request, upload screenshots of the issue you are experiencing.

Figure 110: Submit Request button

General Accessibility Guidelines

MACPro users can utilize the '**Tab**' key to navigate through every data field, image, icon and link within MACPro. Here are the general functions available to users in MACPro:

1. **+/- link**
   - Selecting this link will expand or collapse particular sections within the application.
2. **"View All Responses" button**
   - Selecting this button will expand all sections on a page within MACPro.
3. **"Save" button**
   - Selecting this button will save data you have entered within the application. If you do not receive a red validation error after selecting the save button, the data can be considered successfully saved.
4. **Other Action buttons**
   - When the user selects any action button like "**Cancel**" or "**Go to Admin Page**", the application will perform the respective function. If you do not receive any errors on the page, the action can be considered successfully completed.

Alternatively, users can use following shortcut keys in JAWS to navigate and take actions:

1. **Insert + F7 key**
   - By using this key combination, users will be provided with list of all the links on the page. Users can navigate through the list using the arrow keys and take appropriate actions.
2. **Insert + F6 key**
   - By using this key combination, users will be provided with list of all the headings on the page. Users can navigate through the list using the arrow keys and take appropriate actions.