Introductory Guide for MACPro Health Homes State Plan Amendments Migrated Data

Reflects Appian Environment as of 04/21/2016

Version: 0.6

Date: 1/3/2018

Table of Contents

Welcome to the Introductory Guide for MACPro Health Homes State Plan Amendments Migrated Data

This Introductory Guide for MACPro Health Homes State Plan Amendments (SPA) Migrated Data describes the steps for state users to utilize data migrated from MMDL into MACPro. States may use this information as the basis for future amendments. *Please be advised that the pre-populated data is not considered official.* As subsequent SPAs and amendments are submitted and approved in MACPro, they will become the official record of the Medicaid State Plan for Health Home programs. Please contact the MACPro Help Desk if you have questions outside the scope of this document.

Assistance with the MACPro system is available through the MACPro Help Desk, Monday through Friday, 8:00 am-6:00 pm Eastern Standard Time. For MACPro questions or issues, contact the MACPro Help Desk at MACPro_HelpDesk@cms.hhs.gov or call 301-547-4688.

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.

Step 1: State Editor Copies Migrated Data Into New Submission Package

For states' convenience, data from their latest approved Health Home SPA was migrated from the MMDL into the MACPro Health Home template. Once the State Editor begins amending the migrated SPA in MACPro, he/she will see the migrated data copied into the fields of the Health Homes Reviewable Units. Please note that the pre-populated data from MMDL within MACPro fields are not considered official.

Users will notice new fields in MACPro that did not exist on the MMDL, fields that differ between the MMDL and MACPro, and fields that were on the MMDL that have either been combined on MACPro or removed in the migration. Due to the fact that the system does not alert users to what fields have changed from the MMDL to MACPro, the State Editor should review the data copied into each Health Homes Reviewable Unit to validate its accuracy.

To amend an existing Health Homes program that was migrated from MMDL to MACPro, the State Editor will create a new submission package in MACPro. States will receive a notification if a SPA has been migrated. If your state received such notification, the most recently approved Health Homes SPA for your state's Health Home program was migrated, assuming that there are no revisions to it currently in progress. The State Editor will choose the migrated SPA to copy into a new submission package in MACPro.
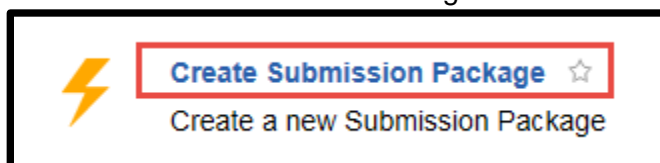
If the State Editor would rather copy and paste the data from the converted PDF into a new submission package without having the data pre-populate, he/she should follow Alternate Step 2: State Editor- Copy Data Manually From Migrated PDF.

1.1 State Editor logs into MACPro.

1.2 Select the "Actions" tab from the upper tool bar.
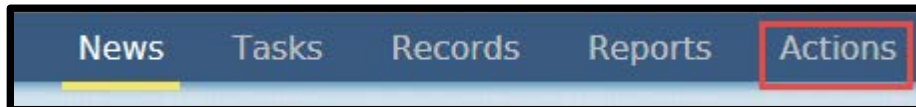
1.3 Select "Create Submission Package.

1.4 Select "View All Responses" to expand the field in the Submission – Summary.

1.5 Fill out the information in the Submission Type, Key Contacts, SPA ID and Effective Date, Executive Summary, Dependency Description, Disaster-Related Submission, Federal Budget Impact and Statute/Regulation Citation and Governor's Office Review fields. Users may refer to the MACPro Health Homes State Plan Amendment Introductory State User Guide for further instructions on how to enter this data.

1.6 Select "Save Reviewable Unit" at the bottom of the page.

1.7 If you chose "Official Submission Package" in the Submission Type field, you will receive a message asking if you want to change the submission type of this package. Select "Yes."

1.8 Scroll to the bottom of the page. From the drop down box labeled "Navigate to Reviewable Unit," choose "Submission – Medicaid State Plan."

1.9 Next, select "Go to Selected Reviewable Unit."

1.10 In the Submission – Medicaid State Plan section, select the radio button next to "Create new Health Homes program."

1.11   This field is dynamic and will prompt you to choose to copy from an existing Health Homes program or to create a new program from a blank form. You will select the radio button next to "Copy from existing Health Homes program."

Submission - Medicaid State Plan

The submission includes the following
☑ Benefits
   ☑ Health Homes Program

   ⦿ Create new Health Homes program
   ○ Amend existing Health Homes program
   ○ Terminate existing Health Homes program

   * ⦿ Copy from existing Health Homes program
     ○ Create new program from blank form

1.12   Enter the Name of the Health Homes Program in the text box labeled "Name of Health Homes Program."

Submission - Medicaid State Plan

The submission includes the following
☑ Benefits
   ☑ Health Homes Program

   ⦿ Create new Health Homes program
   ○ Amend existing Health Homes program
   ○ Terminate existing Health Homes program

   * ⦿ Copy from existing Health Homes program
     ○ Create new program from blank form

   *Name of Health   Health Homes Program Example
   Homes Program

1.13   In the drop down box labeled "Select Health Homes Program," select the program
labeled "Migrated_HH" and the SPA number migrated from MMDL.

Submission - Medicaid State Plan

The submission includes the following
☑ Benefits
☑ Health Homes Program

◉ Create new Health Homes program
○ Amend existing Health Homes program
○ Terminate existing Health Homes program

* ◉ Copy from existing Health Homes program
○ Create new program from blank form

* Name of Health
Homes Program | Health Homes Program Example

* | -- Select Health Homes Program --
MIGRATED_HH_AL.1281.R00.00

Validation & Navigation

1.14   In the table below, select the check box next to the Package ID that you wish to copy.

☑	Package ID	SPA ID	Package Status
☑	AL2016MH9999D	AL.1281.R00.00	Approved

1.15   Select "Save Reviewable Unit."

Save Reviewable Unit | Go to Selected Reviewable Unit

1.16 You will notice now that the drop down box labeled "Navigate to Reviewable Unit" has been populated with the Health Homes Reviewable Units. You must enter data and validate each Submission Reviewable Unit. The Health Homes Reviewable Units will contain migrated and converted data from the approved SPA in MMDL.

Validation & Navigation

Would you like to validate the reviewable unit data?

◉ Yes ○ No

Note: If validation fails, errors will appear in red above.

PRA Disclosure Statement: According to the Paperwork Reduction Act of 1995, no person control number. The valid OMB control number for this information collection is 0938-11 8 hours per response, including the time to review instructions, search existing data resou c have comments concerning the accuracy of the time estimate(s) or suggestions for impr v Clearance Officer, Mail Stop C4-26-05, Baltimore, Maryland 21244-1850.

[Exit]

Navigate to Reviewable Unit

- -- Select Reviewable Unit --
- Submission - Summary
- Submission - Medicaid State Plan
- Submission - Public Comment
- Submission - Tribal Input
- Submission - SAMHSA Consultation
- Health Homes Intro
- Health Homes Population and Enrollment Criteria
- Health Homes Geographic Limitations
- Health Homes Services
- Health Homes Providers
- Health Homes Service Delivery Systems
- Health Homes Payment Methodologies
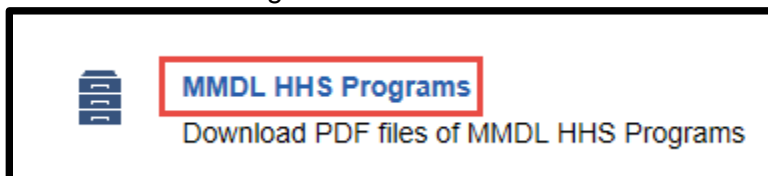- Health Homes Monitoring, Quality Measurement and Evaluation

Step 2: State Editor – Compares Migrated Data in MACPro to the Approved SPA in MMDL

As needed, the State Editor can compare the migrated data in MACPro to the printed copy of the approved SPA in MMDL.
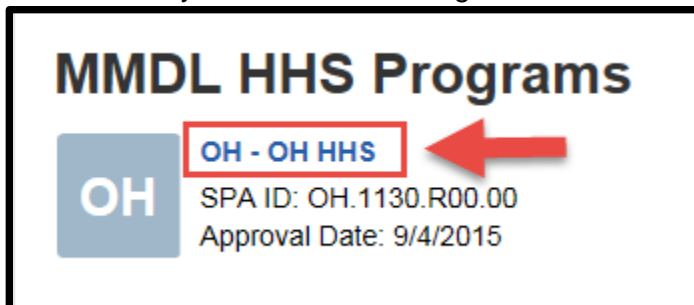
2.1 The State Editor will select the "Records" tab from the upper toolbar.

2.2 Select "MMDL HHS Programs."

2.3 Select the link to your state's HHS Program.

2.4 In the Program Document section, select the link to download the HHS Program.

Records / MMDL HHS Programs
OH - OH HHS Follow

Program Name OH HHS

Program ID OH.1130

SPA ID OH.1130.R00.00

Transmittal OH-14-0014
Number

Program Download: OH 14-0014
Document

State Ohio

Region Region 5

Effective Date 7/1/2014

Approval Date 9/4/2015

Document Type PDF

2.5 Choose to either open or save the PDF.

Do you want to open or save **OH 14-0014.pdf** (4.63 MB) from **macpro-im-macproim-1h8e487ucn6gq-1138694770.us-east-1.elb.amazonaws.com**?   ×

Open   Save ▼   Cancel

2.6 The State Editor will now have a copy of the complete Health Home State Plan Amendment by which he/she can compare the migrated data in MACPro.
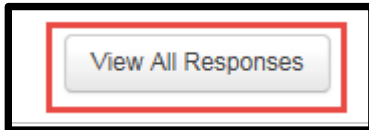
2.7 Navigate to one of the Health Homes Reviewable Units by selecting it from the drop down list of Reviewable Units. For this example, we have chosen "Health Homes Population and Enrollment Criteria."

-- Select Reviewable Unit --
Submission - Summary
Submission - Medicaid State Plan
Submission - Public Comment
Submission - Tribal Input
Submission - SAMHSA Consultation
Health Homes Intro
Health Homes Population and Enrollment Criteria
Health Homes Geographic Limitations
Health Homes Services
Health Homes Providers
Health Homes Service Delivery Systems
Health Homes Payment Methodologies
Health Homes Monitoring, Quality Measurement and Evaluation

**2.8** In the bottom right hand corner, select "Go to Selected Reviewable Unit."
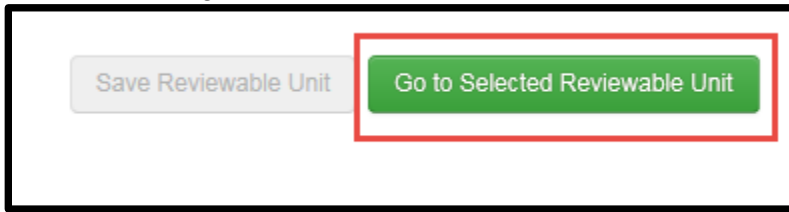
2.9 Expand the fields by selecting "View All Responses."

2.10 The State Editor will begin to see migrated and converted data from MMDL. In the example below, data from the Enrollment of Participants has been migrated. The radio button next to "Opt-in to Health Homes provider" is selected and text is entered in the text box labeled "Describe the process used."
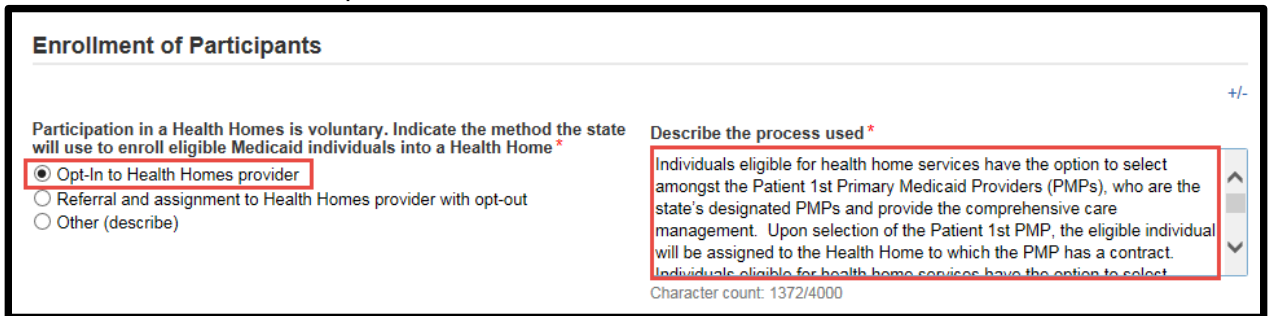
2.11 The State Editor will compare the data from the printed copy from MMDL to the migrated data prepopulated in MACPro. The image below shows the data from the Enrollment of Participants section of the approved SPA in MMDL. The State Editor will notice that the correct radio button is selected in the migrated data and then compare the text entered in the text box.
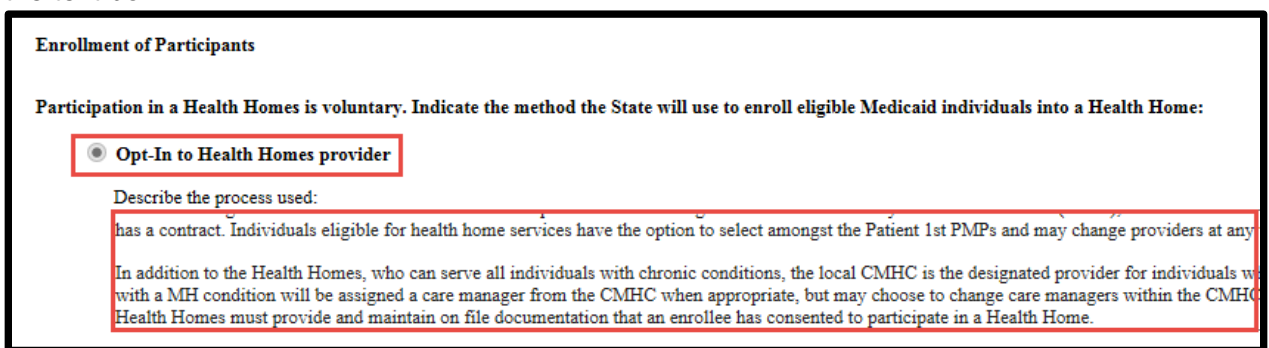
2.12 The templates in MACPro differ from MMDL, so there will be fields that will need to be edited. If the State Editor notices that data has not been migrated properly, he/she will make the appropriate edits. The State Editor may also enter new amendments to the data while checking the migrated data.

2.13 To answer the question "Would you like to validate the reviewable unit data," select the radio button next to "Yes." If any validation errors occur, they will appear in red. All validation errors must be corrected before the Reviewable Unit can be validated.

Validation & Navigation

Would you like to validate the reviewable unit data?

◉ Yes ○ No

Note: If validation fails, errors will appear in red above.

2.14 Then, select "Save Reviewable Unit" in the bottom right of the screen to ensure that edits are saved.

Save Reviewable Unit   Go to Selected Reviewable Unit

2.15 If edits are made, the State Editor will notate these changes in the Executive Summary field to bring to the attention of CMS. The Executive Summary field is located in the "Health Homes Intro" Reviewable Unit. To navigate to this Reviewable Unit, select "Health Homes Intro" from the drop down list of Reviewable Units.

Validation & Navigation

Would you like to validate the reviewable unit data?

○ Yes ◉ No

Warning: Any field containing more than 4000 characters will be truncated when saved.

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-- Select Reviewable Unit --
Submission - Summary
Submission - Medicaid State Plan
Submission - Public Comment
Submission - Tribal Input
Submission - SAMHSA Consultation
Health Homes Intro
Health Homes Population and Enrollment Criteria
Health Homes Geographic Limitations
Health Homes Services
Health Homes Providers
Health Homes Service Delivery Systems
Health Homes Payment Methodologies
Health Homes Monitoring, Quality Measurement and Evaluation

2.16 In the bottom right hand corner, select "Go to Selected Reviewable Unit."

Save Reviewable Unit   Go to Selected Reviewable Unit

2.17 Expand the fields by selecting "View All Responses."

View All Responses

2.18   In the Executive Summary text box, detail the edits made to the migrated data.

Executive Summary

+/-

Provide an executive summary of this Health Homes program including the goals and objectives of the program, the population, providers, services and service delivery model used *

The Team of Health Care Professionals to provide these services include Physicians, Nurse Care Coordinators, Social Workers, Behavioral Health Professionals, Substance Abuse Providers, ADPH, CMHCs, FQHCs, RHCs, and Pharmacists.

Upon review of the migrated data from MMDL, changes have been made to the Enrollment of Participants field in the Health Homes Population and Enrollment Criteria Reviewable Unit.

Character count: 2158/4000

2.19   As needed, the State Editor will repeat the process of comparing the migrated data in MACPro to the printed copy of the approved SPA in MMDL for each Health Homes Reviewable Unit.

2.20   After all the last Reviewable Unit has been validated, select Exit in the bottom left of the page.

Exit   Save Reviewable Unit   Go to Selected Reviewable Unit

2.21   Once you select "Exit" as shown in Step 3.15, you will be redirected to the "Related Actions" screen under the "Records" tab. Select "Forward Package to State POC for Review". *If you had navigated away from your package rather than selecting "Exit" and have just logged back into MACPro, go to the "Records" tab, then click "Submissions Packages" for your state, and then your submission package. Next, select "Related Actions" from the left panel. Proceed to forward the package to the State Point of Contact.*

Records / Submission Packages

AL - Submission Package - AL2016MH0

Forward Package to State POC for Review
Forward a submission package to the State POC for review

Modify Package
Modify an existing Submission Package

2.22   On the next page, select workflow action "Forward Submission Package to SPOC" and then select the green "Execute Action" button. The instructions box is optional.

2.23   Select "Yes".

2.24   The State Point of Contact and State Director will review the package and approve all migrated data. The State Point of Contact will submit the submission package to CMS. For more information on the steps taken by the State Point of Contact and State Director, please refer to the MACPro Health Homes State Plan Amendment Introductory State User Guide.

Alternate Step 1: State Editor- Copy Data Manually From Migrated PDF

A.1.1   State Editor logs into MACPro.

A.1.2   Select the "Actions" tab from the upper tool bar.
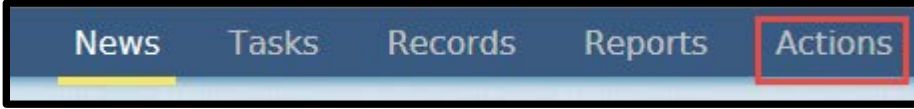
A.1.3   Select "Create Submission Package.
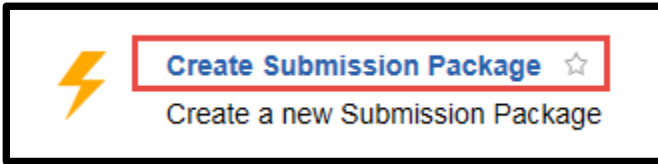
A.1.4   Select "View All Responses" to expand the field in the Submission – Summary.
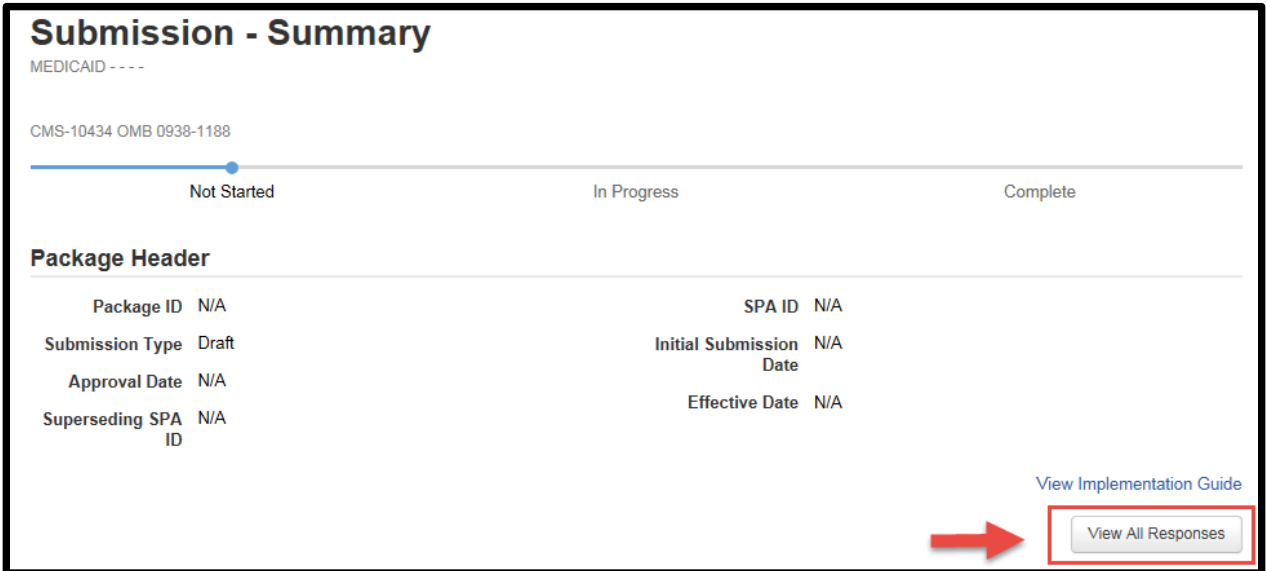
A.1.5 Fill out the information in the Submission Type, Key Contacts, SPA ID and Effective Date, Executive Summary, Dependency Description, Disaster-Related Submission, Federal Budget Impact and Statute/Regulation Citation and Governor's Office Review fields. Users may refer to the MACPro Health Homes State Plan Amendment Introductory State User Guide for further instructions on how to enter this data.

A.1.6 Select "Save Reviewable Unit" at the bottom of the page.
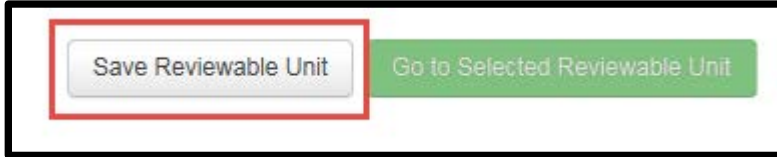
A.1.7 If you chose "Official Submission Package" in the Submission Type field, you will receive a message asking if you want to change the submission type of this package. Select "Yes."
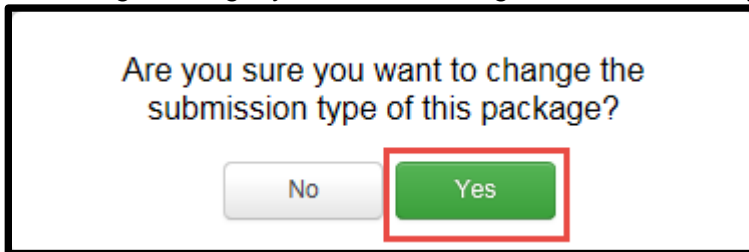
A.1.8 Scroll to the bottom of the page. From the drop down box labeled "Navigate to Reviewable Unit," choose "Submission – Medicaid State Plan."
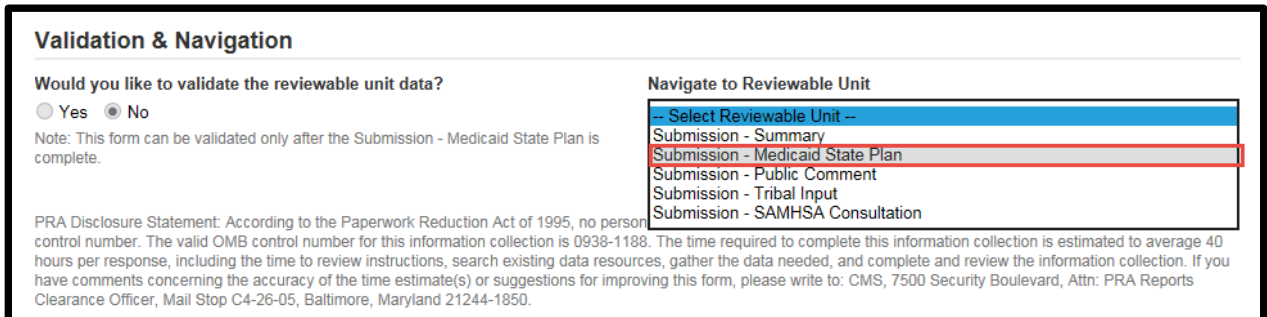
A.1.9 Next, select "Go to Selected Reviewable Unit."
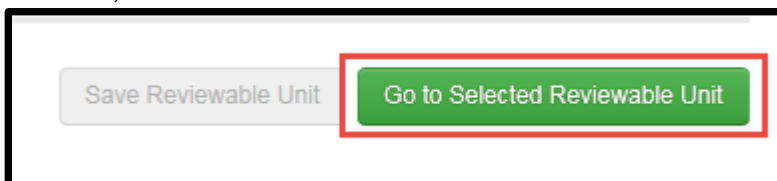
A.1.10 In the Submission – Medicaid State Plan section, select the radio button next to "Create new Health Homes program."

A.1.11 This field is dynamic and will prompt you to choose to copy from an existing Health Homes program or to create a new program from a blank form. You will select the radio button next to "Create new program from blank form."

A.1.12 Enter the Name of the Health Homes Program in the text box labeled "Name of Health Homes Program."
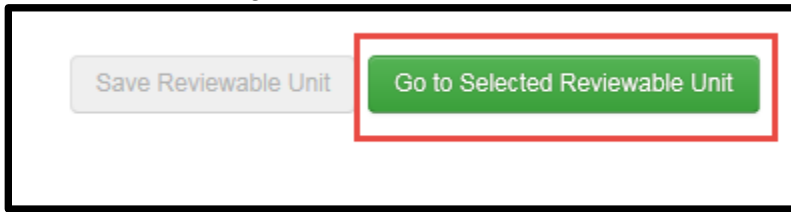
A.1.13 Select "Save Reviewable Unit."
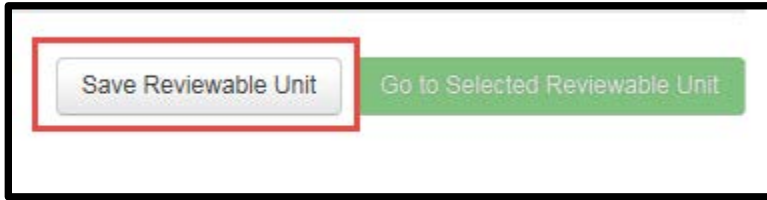
A.1.14 You will notice now that the drop down box labeled "Navigate to Reviewable Unit" has been populated with the Health Homes Reviewable Units. You must enter data and validate each Submission Reviewable Unit and Health Homes Reviewable Unit.
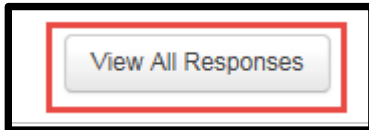
Validation & Navigation

Would you like to validate the reviewable unit data?
◉ Yes   ○ No

Note: If validation fails, errors will appear in red above.

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Exit

Navigate to Reviewable Unit

-- Select Reviewable Unit --
Submission - Summary
Submission - Medicaid State Plan
Submission - Public Comment
Submission - Tribal Input
Submission - SAMHSA Consultation
Health Homes Intro
Health Homes Population and Enrollment Criteria
Health Homes Geographic Limitations
Health Homes Services
Health Homes Providers
Health Homes Service Delivery Systems
Health Homes Payment Methodologies
Health Homes Monitoring, Quality Measurement and Evaluation

A.1.15 Navigate to one of the Health Homes Reviewable Units by selecting it from the drop down list of Reviewable Units. For this example, we have chosen "Health Homes Population and Enrollment Criteria."
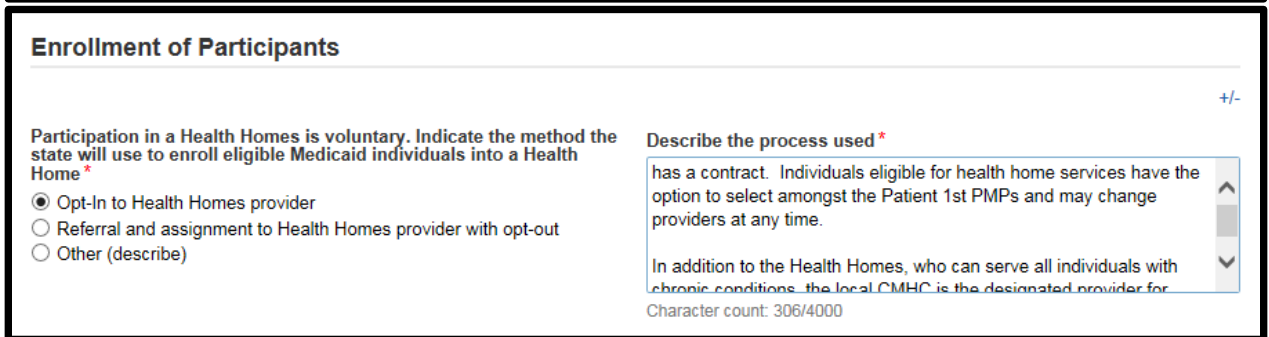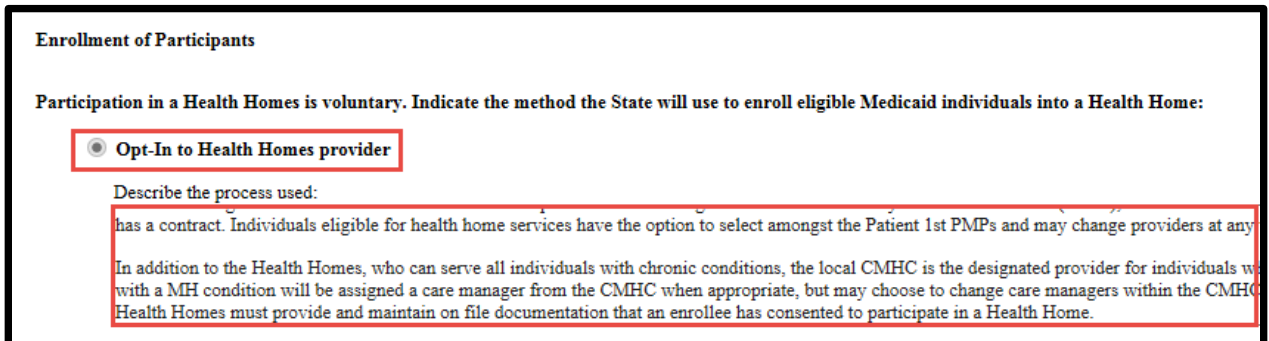
-- Select Reviewable Unit --
Submission - Summary
Submission - Medicaid State Plan
Submission - Public Comment
Submission - Tribal Input
Submission - SAMHSA Consultation
Health Homes Intro
Health Homes Population and Enrollment Criteria
Health Homes Geographic Limitations
Health Homes Services
Health Homes Providers
Health Homes Service Delivery Systems
Health Homes Payment Methodologies
Health Homes Monitoring, Quality Measurement and Evaluation

A.1.16 In the bottom right hand corner, select "Go to Selected Reviewable Unit."

A.1.17 Expand the fields by selecting "View All Responses."
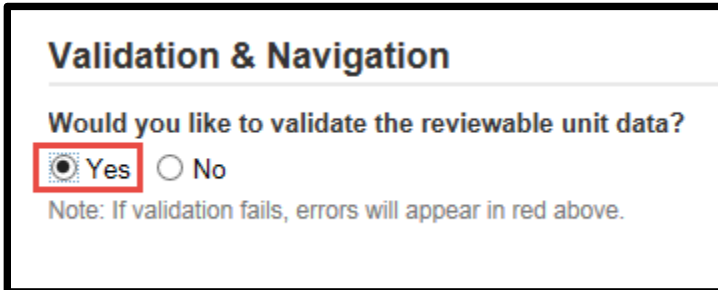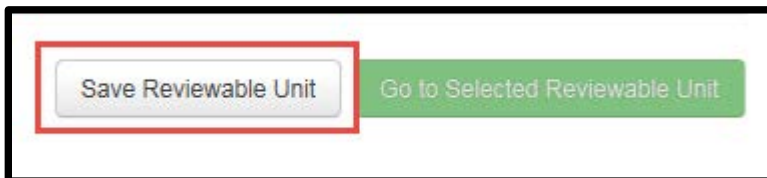

A.1.18 The State Editor will use the information in the migrated PDF to populate the fields in MACPro. The images below show the data from the Enrollment of Participants section of the approved SPA in MMDL and the data entered manually into the corresponding field in MACPro.

A.1.19 The State Editor may enter new amendments to the data while copying the data from the migrated SPA.

A.1.20 To answer the question "Would you like to validate the reviewable unit data," select the radio button next to "Yes." If any validation errors occur, they will appear in red. All validation errors must be corrected before the Reviewable Unit can be validated.

A.1.21 Then, select "Save Reviewable Unit" in the bottom right of the screen to ensure that edits are saved.

A.1.22 The State Editor will repeat the process of copying the migrated data from the approved SPA in MMDL into MACPro for each Reviewable Unit.

A.1.23 After all the last Reviewable Unit has been validated, select Exit in the bottom left of the page.

A.1.24 Once you select "Exit" as shown in Step A.1.23, you will be redirected to the "Related Actions" screen under the "Records" tab. Select "Forward Package to State POC for Review". *If you had navigated away from your package rather than selecting "Exit" and have just logged back into MACPro, go to the "Records" tab, then click "Submissions Packages" for your state, and then your submission package. Next, select "Related Actions" from the left panel. Proceed to forward the package to the State Point of Contact.*

A.1.25 On the next page, select workflow action "Forward Submission Package to SPOC" and then select the green "Execute Action" button. The instructions box is optional.
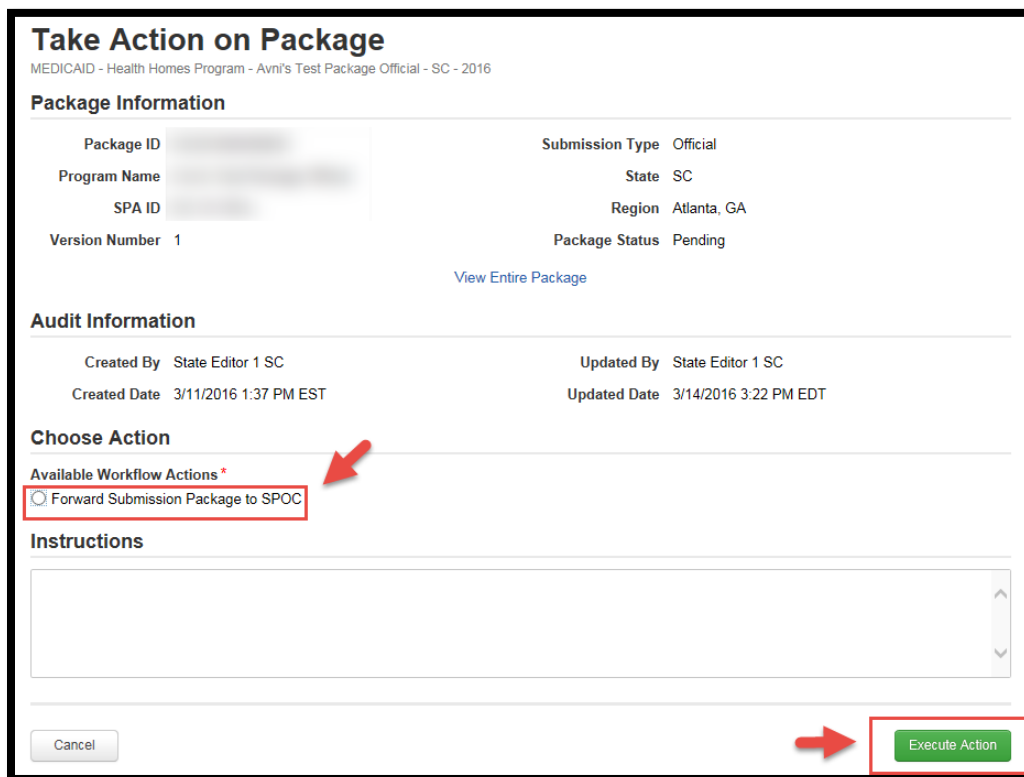
A.1.26 Select "Yes".
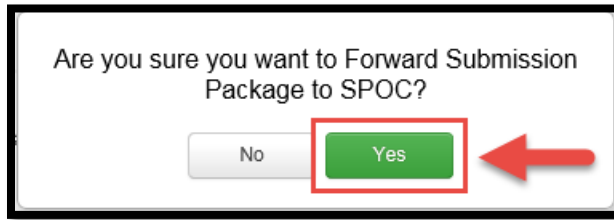
A.1.27 The State Point of Contact and State Director will review the package and approve all migrated data. The State Point of Contact will submit the submission package to CMS. For more information on the steps taken by the State Point of Contact and State Director, please refer to the MACPro Health Homes State Plan Amendment Introductory State User Guide.

Additional Actions

Printing a Submission Package

1. Select "Records" from the upper tool bar.

2. Select "Submission Packages" for your State.
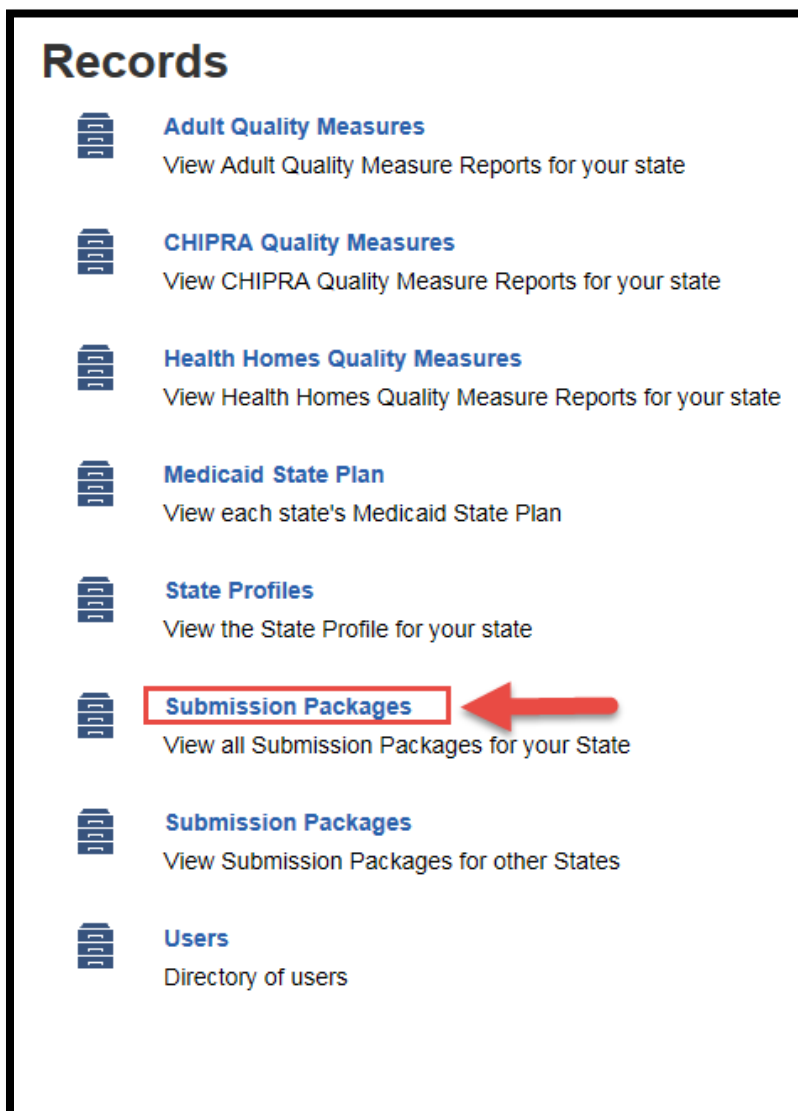
3. Select the appropriate submission package.

4. Choose "Reviewable Units" from the left panel.

5. Click on a Reviewable Unit link.

SC - Submission Package - SC2016MH0065O - (SC-16-102-x)

Follow

Submission Form - Reviewable Units

Reviewable Unit		Updated By	Updated Date	Status
Submission - Summary		State Editor 1 SC	3/16/2016 3:32 PM EDT	✓
Submission - Medicaid State Plan		State Editor 1 SC	3/16/2016 3:23 PM EDT	✓
Submission - Public Comment		State Editor 1 SC	3/16/2016 3:33 PM EDT	✓
Submission - Tribal Input		State Editor 1 SC	3/16/2016 3:33 PM EDT	✓
Submission - SAMHSA Consultation		State Editor 1 SC	3/16/2016 3:34 PM EDT	✓

Health Homes SPA - Reviewable Units

Reviewable Unit	Proposed Effective Date	Updated By	Updated Date	Status
Health Homes Intro	3/14/2016	State Editor 1 SC	3/16/2016 3:34 PM EDT	✓
Health Homes Population and Enrollment Criteria	3/14/2016	State Editor 1 SC	3/16/2016 3:35 PM EDT	✓
Health Homes Geographic Limitations	3/14/2016	State Editor 1 SC	3/16/2016 3:35 PM EDT	✓
Health Homes Services	3/14/2016	State Editor 1 SC	3/16/2016 3:37 PM EDT	✓
Health Homes Providers	3/14/2016	State Editor 1 SC	3/16/2016 3:38 PM EDT	✓
Health Homes Service Delivery Systems	3/14/2016	State Editor 1 SC	3/16/2016 3:40 PM EDT	✓
Health Homes Payment Methodologies	3/14/2016	State Editor 1 SC	3/16/2016 3:40 PM EDT	✓
Health Homes Monitoring, Quality Measurement and Evaluation	3/14/2016	State Editor 1 SC	3/16/2016 3:45 PM EDT	✓

6. Either select "View All Responses" or select each +/- button to expand each section depending on which option is available.

7. Select "File", scroll down and then select "Print". You may also use the keyboard shortcut Ctrl+P. This will print the Reviewable Unit data to the printer of your choice.
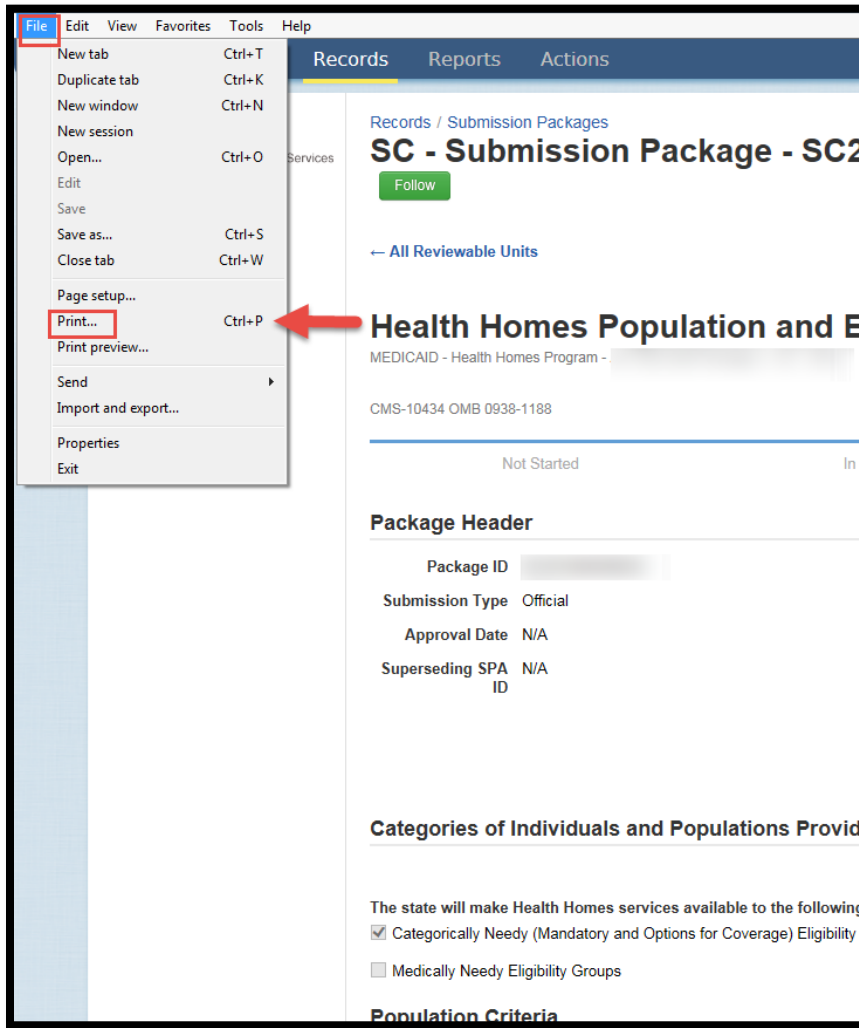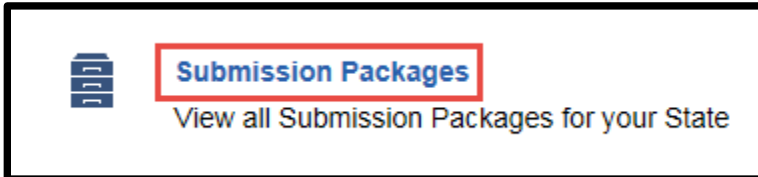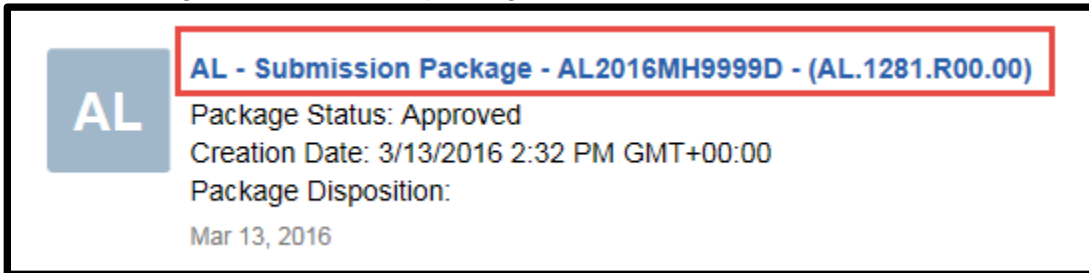
Allow CMS to View Migrated SPA from MMDL

1. Log in as the State Point of Contact.

2. Select "Records" from the upper tool bar.

3. Select "Submission Packages-View all Submission Packages for your State."

4. Locate the migrated submission packages from MMDL and select the link.

5. From the left hand tool bar, select "Related Actions."

6. Select the option to "Allow CMS to View Screen."
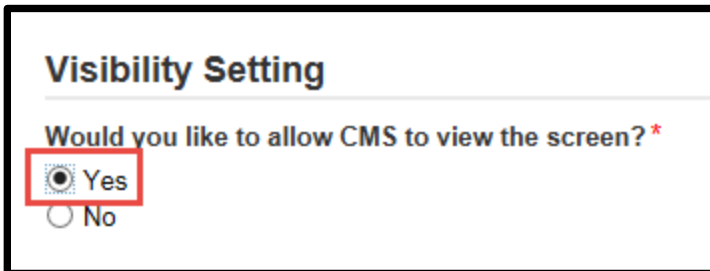

Records / Submission Packages

AL - Submission Package - AL2016MH9999D

Follow

⚡ **Create Correspondence Log**
Create a Correspondence Log for the submission package

⚡ **Allow CMS to View Screen** ⬅
Update the visibility of this package (allow or prohibit CMS from viewing it)

7. Under the section labeled "Visibility Setting," there is a question that asks "Would you like to allow CMS to view the screen?" Select the radio button next to "Yes."
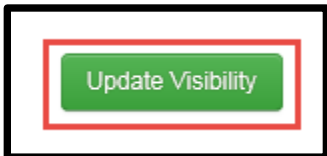

Visibility Setting

Would you like to allow CMS to view the screen? *
◉ Yes
○ No

8. In the bottom right of the page, select the green button labeled "Update Visibility." CMS will now be able to view the submission package.
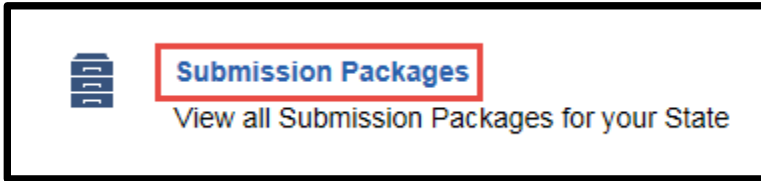

Update Visibility

Locating the Migrated SPA as a State User

1. Log in to MACPro.

2. Select "Records" from the upper tool bar.
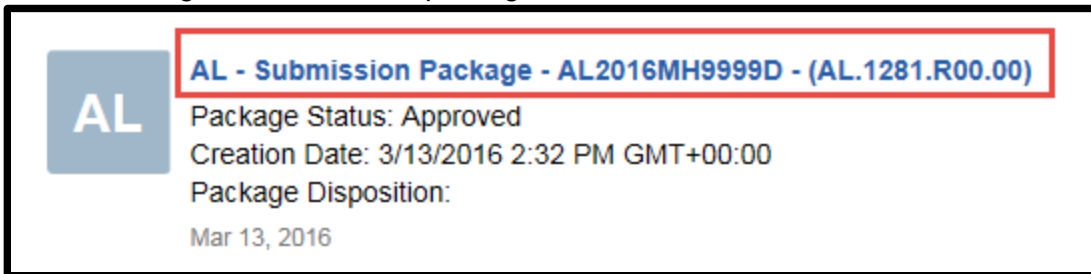

News   Tasks   **Records**   Reports   Actions

3. Select "Submission Packages-View all Submission Packages for your State."

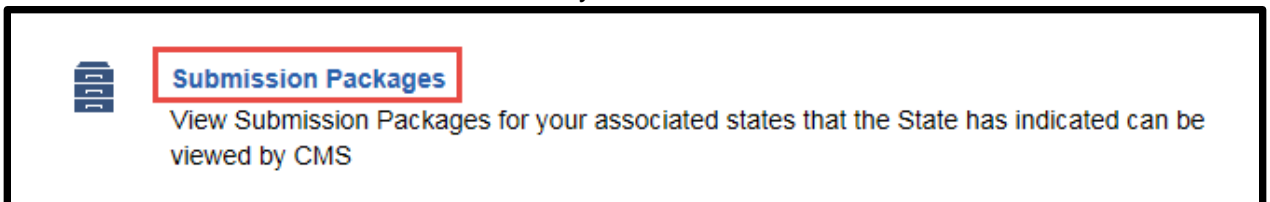**4.** Locate the migrated submission package from MMDL and select the link.

Locating the Migrated SPA as a CMS User

In order for CMS to view the migrated SPA from MMDL, the State Point of Contact needs to allow CMS to view the submission package. He/she may follow the instructions to Allow CMS to View Migrated SPA from MMDL. After the visibility has been updated, CMS users may follow the directions below to locate the migrated SPA.

1. Log in to MACPro.

2. Select "Records" from the upper tool bar.

3. Select "Submission Packages-View Submission Packages for your associated states that the State has indicated can be viewed by CMS."

4. Locate the migrated submission package from MMDL and select the link.

Browser Information for MACPro

Browser	Comments
Microsoft Internet Explorer 11, 10, 9, and 8	Microsoft Internet Explorer 10, 9, and 8 are depreciated and will not be supported in a future release of MACPro. Microsoft Internet Explorer 11 is supported on Windows 8.x tablet.
Mozilla Firefox	Mozilla Firefox updates automatically. MACPro supports the most recent stable version of Mozilla Firefox.
Google Chrome	Google Chrome updates automatically. MACPro supports the most recent stable version of Google Chrome.
Apple Safari	Safari is only supported on Mac operating systems.