MACPro Health Homes State Plan Amendment
Introductory CMS User Guide

Reflects Appian Environment as of 04/20/2016

Version: 0.7

Date: 04/27/2016

Table of Contents

Welcome to the Introductory Guide for MACPro Health Homes State Plan Amendments CMS Users

This Introductory Guide for MACPro CMS Users describes the steps for CMS users to review and approve a Health Homes State Plan Amendment (SPA). Information on disapproving a Health Homes SPA will be in forthcoming documents. 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 questions regarding the *use of MACPro*, contact the MACPro Help Desk at MACPro_HelpDesk@cms.hhs.gov or call 301-547-4688.

Overview- Review and Approve Health Homes SPA Workflow

High level steps for reviewing and *approving* a Health Homes SPA submission package are listed below.

- **CMS Point of Contact (CPOC)** receives the submission package from the state, assigns Submission Review Team members to Reviewable Units, reviews the submission package, and is responsible for the ongoing communication with the state regarding a submission
- **Submission Review Team (SRT)** performs review and provides assessment
- **CMS Point of Contact (CPOC)** may request clarification, issue an RAI, or recommend approval or disapproval. If the CPOC recommends approval, they then draft the approval notice and select Senior Managers for review
- **Senior Manager (SrMgr)** reviews package disposition and agrees or disagree with approval
- **Package Approver (PA)** receives the package and approves the package
- **CMS Point of Contact (CPOC)** receives the package, uploads the PDF approval letter and returns the package to the State Point of Contact. After the SPOC acknowledges approval, the CPOC closes the package

***Please note: Usernames seen in images throughout this document are roles used only for training purposes. The name found in the top right hand corner of your MACPro account will appear as your first and last name, not as your MACPro role.

Draft Submission VS. Official Submission

States have the option of submitting either official or draft submission packages to CMS for review. The differences between these two types of submissions are described below.

Official Submissions

It is suggested that states initially submit simple program amendments or new programs that are similar to existing programs as official submission packages.

- Starts the 90 Day Clock for CMS' review and disposition
- CMS may review and view package
- CMS may issue a Request for Additional Information (RAI) or a Clarification
- CMS may approve or disapprove
- The state may allow CMS to informally view prior to submission

Draft Submissions

It is suggested that states submit complex programs, new Health Home models and new targeted amendments as draft submission packages.

- Drafts submitted to CMS does not start the 90-Day Clock
- State's may allow CMS to informally view prior to submission
- CMS may review, but cannot approve, disapprove, or issue a RAI
- When CMS returns the package to the State they may provide feedback in the correspondence log or offline
- If the state chooses not to edit the returned draft package, it may be closed or converted to an official package for submission to CMS on the 90 Day Clock
- If state chooses to edit the returned submission package, the state must re-submit the draft to CMS off the policy clock
- Closed draft submissions cannot be edited
- Official submissions that were converted from drafts cannot be edited with the exception of the SPA ID and proposed effective date *prior to official submission to CMS*
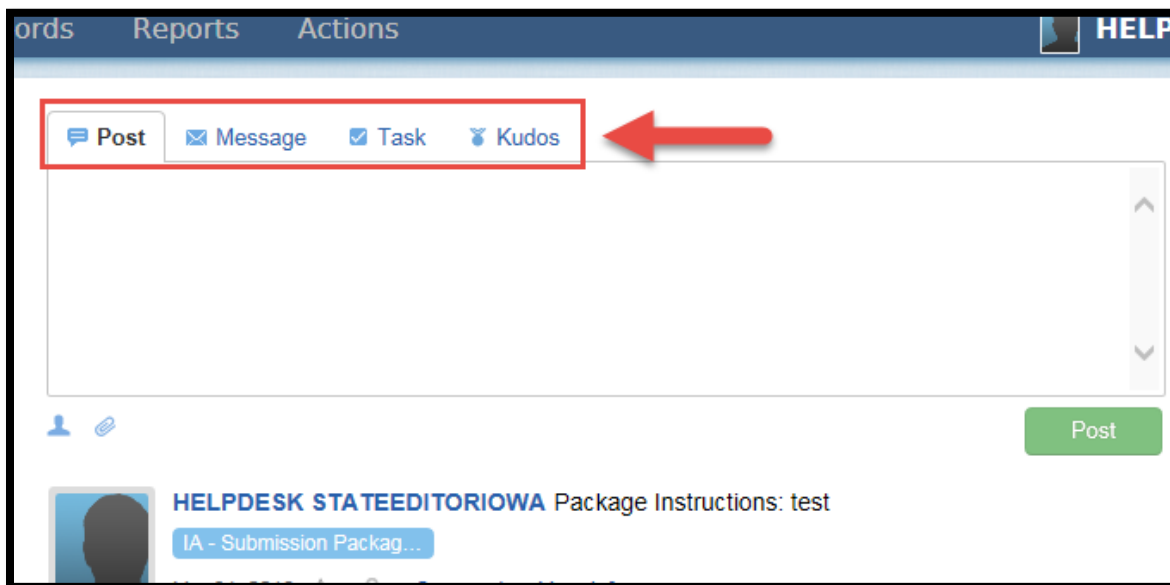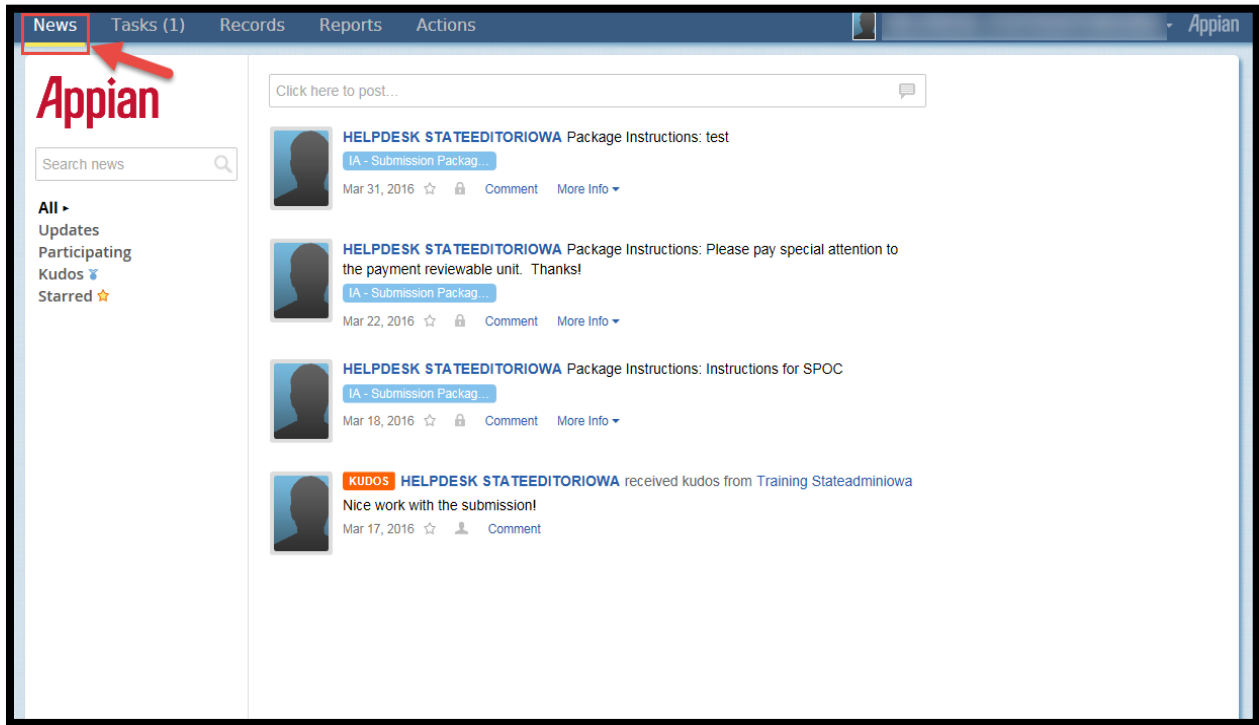
On the next page is a flowchart of the Health Homes SPA CMS Approval Workflow.

# Figure 1: High Level Workflow- Official SPA CMS Approval Workflow
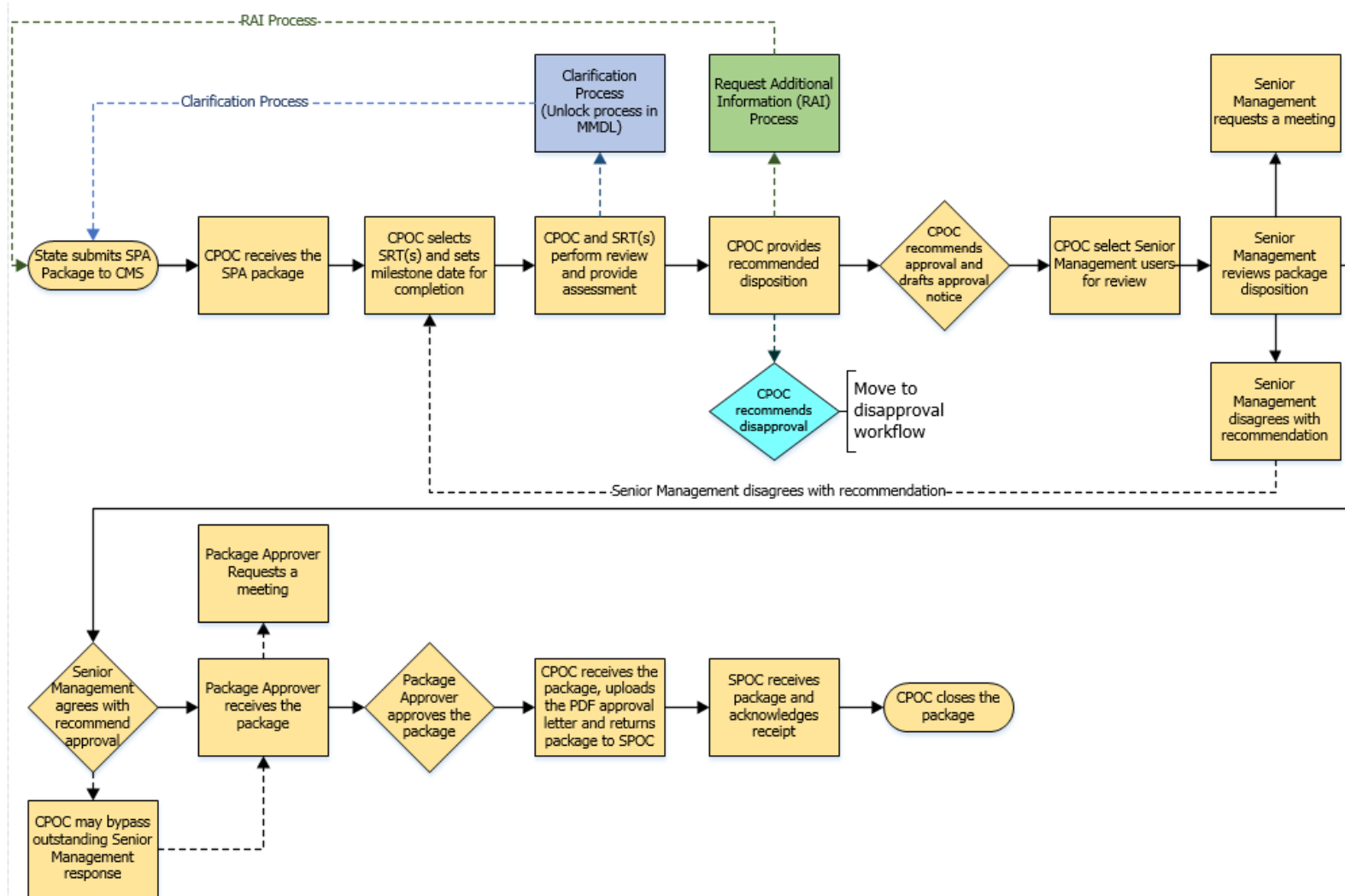
MACPro Home Page

1. When you first log in to MACPro you are taken to your **Newspage**. The Newspage is a location that provides general status updates on packages and can be used for informal communication about packages between different MACPro users. This page operates similarly to a social media platform. You can write a post for your team, send a message to an individual, send a task to an individual, or recognize someone by providing them "kudos" from the text box located at the top of the page. Additionally, activities related to packages you are working with or are following are listed for your reference.
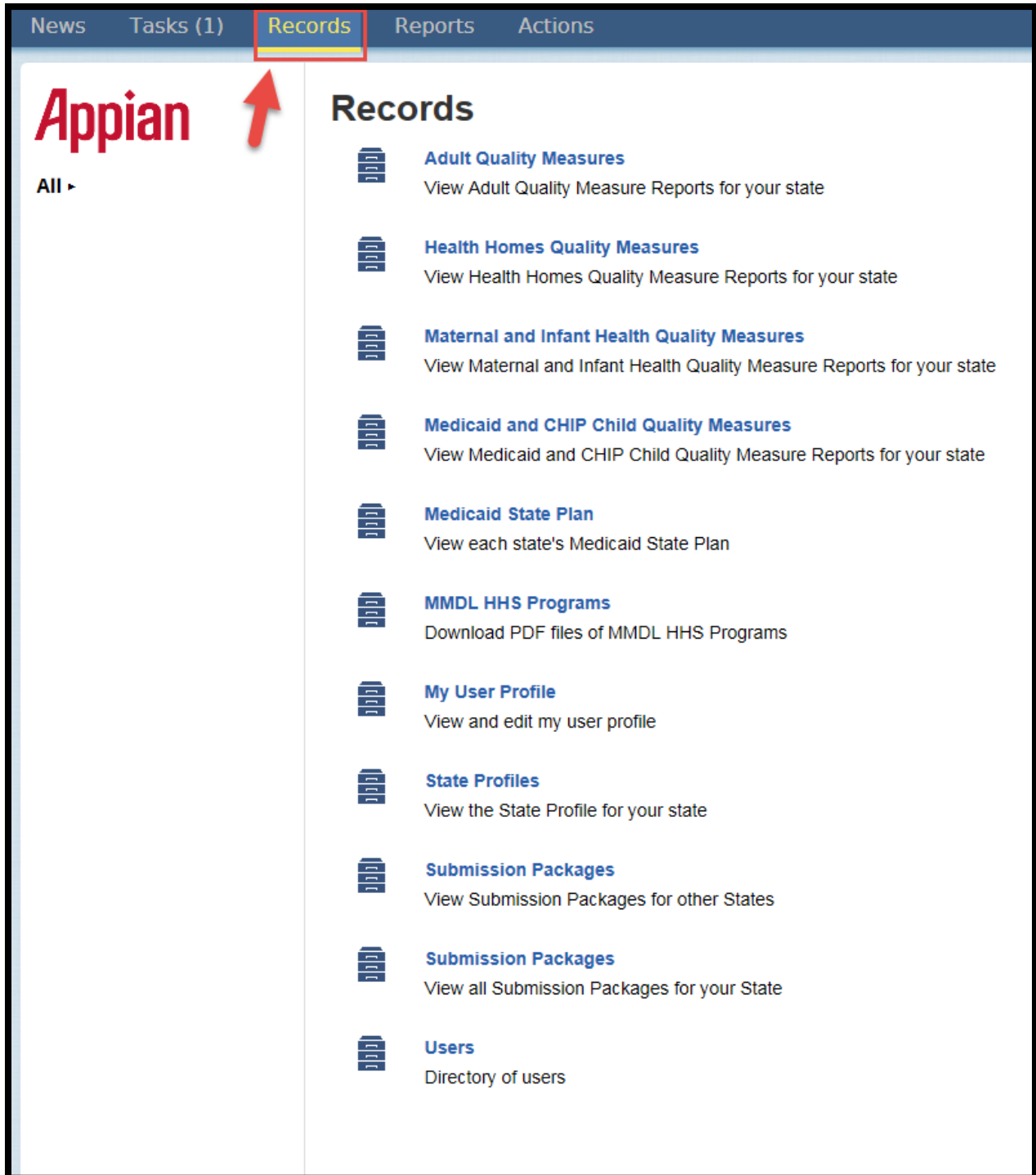
2. The **Actions** tab is for initiating new actions such as creating a submission package.

3. The **Tasks** tab is where specific actions as part of the workflow will populate for you to work on. Tasks are activities that are needed to keep the package moving through the workflow, such as reviewing or responding to an RAI request.
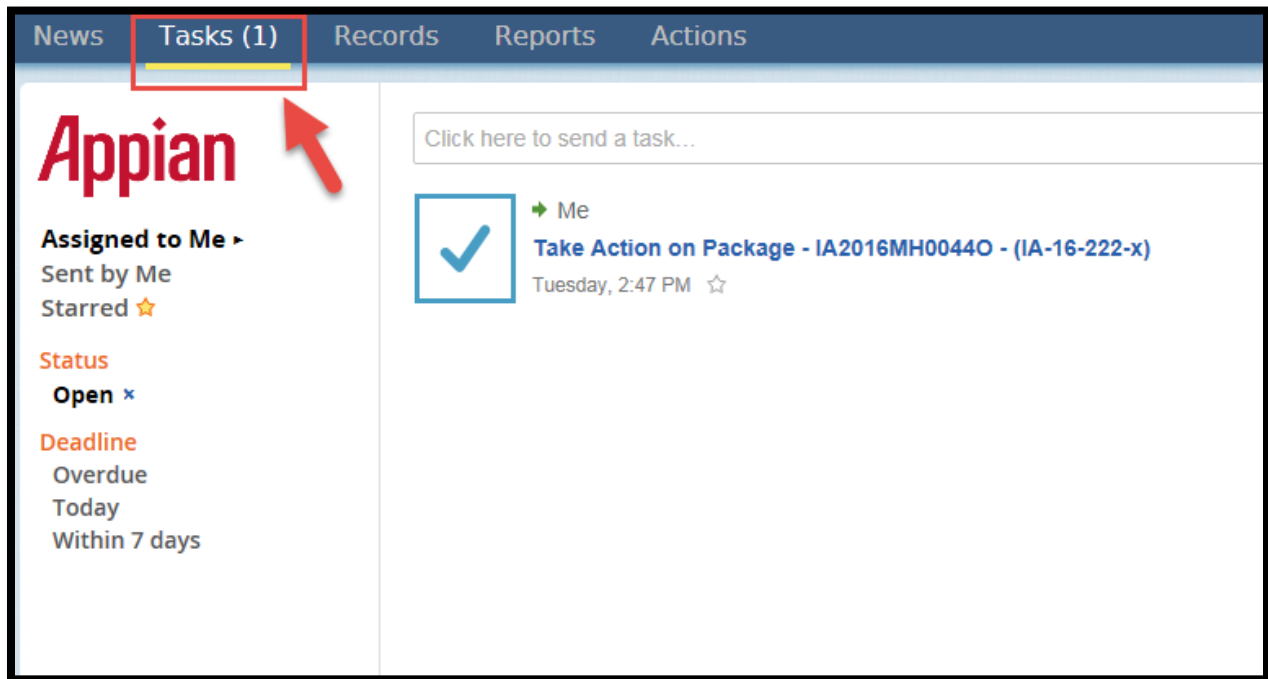
4. The **Records** tab is where you can go to reference submission packages that are complete or in progress.

News   Tasks (1)   Records   Reports   Actions

Appian

All ▸

Records

Adult Quality Measures
View Adult Quality Measure Reports for your state

Health Homes Quality Measures
View Health Homes Quality Measure Reports for your state

Maternal and Infant Health Quality Measures
View Maternal and Infant Health Quality Measure Reports for your state

Medicaid and CHIP Child Quality Measures
View Medicaid and CHIP Child Quality Measure Reports for your state

Medicaid State Plan
View each state's Medicaid State Plan

MMDL HHS Programs
Download PDF files of MMDL HHS Programs

My User Profile
View and edit my user profile

State Profiles
View the State Profile for your state

Submission Packages
View Submission Packages for other States

Submission Packages
View all Submission Packages for your State

Users
Directory of users

5. The **Reports** tab can be used for tracking different activities within MACPro. We will explore each tab in further detail throughout this guide.
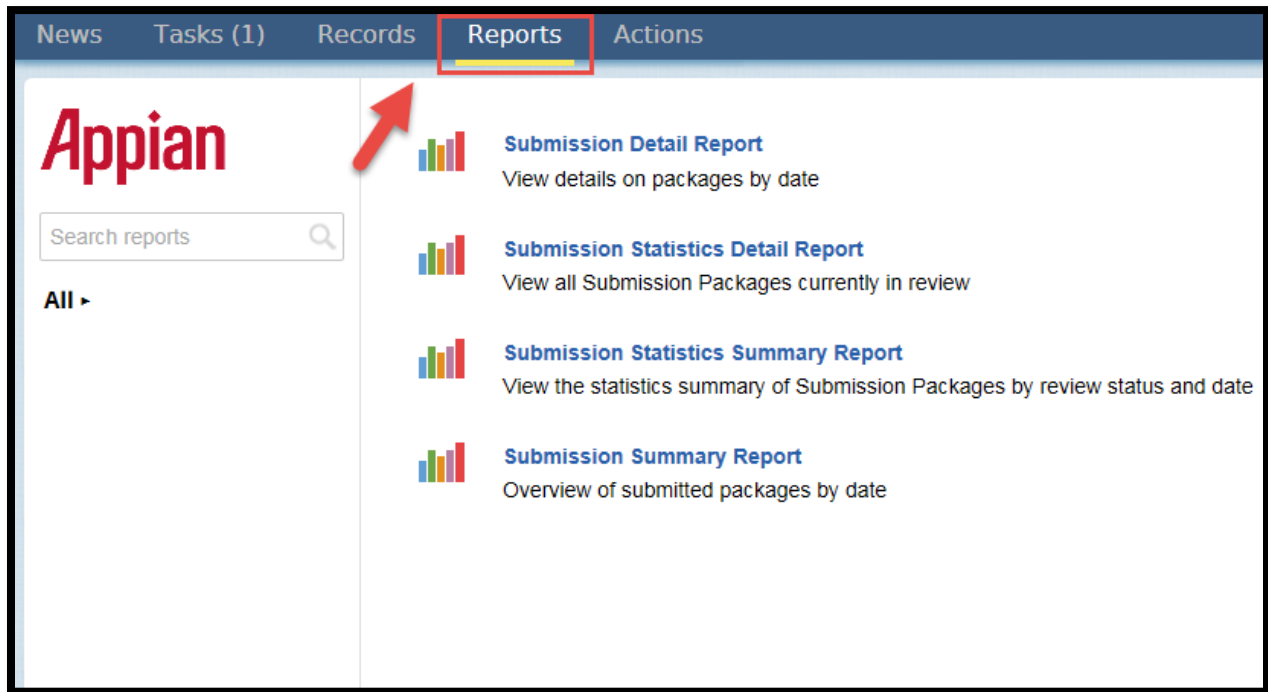
Step 1: CMS Point of Contact- Selects Submission Review Team Members and Sets Milestone Date

1.1 The CMS Point of Contact will receive a notification email indicating that the state has submitted a submission package in MACPro. The CMS Point of Contact logs into MACPro.

1.2 Select the "Tasks" tab from the upper tool bar. The "Tasks" tab is where specific actions as part of the workflow will populate for you to work on. Then select the task labeled "Assign Reviewable Units to SRTs".
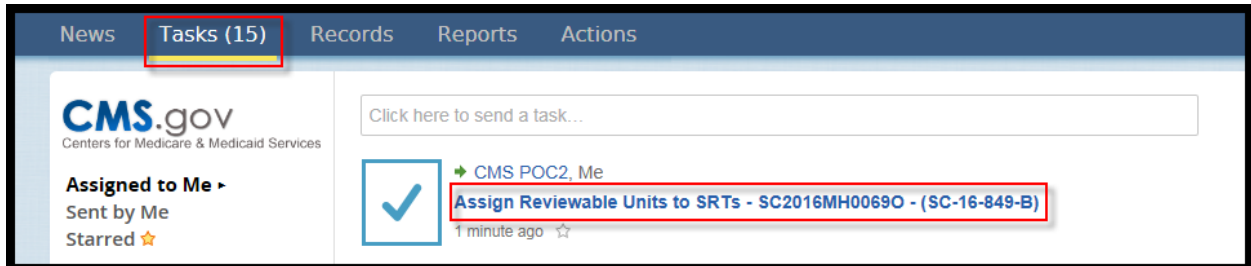
1.3 Accept the task by selecting "Accept." Please note that you will only have to accept if there is more than one CMS Point of Contact associated to the state. You should only accept submission packages that you plan to work on.

1.4 Assign SRT members to Submission Form-Reviewable Units and Health Homes SPA-Reviewable Units by typing the user's first name, last name, or user name in the text boxes below "SRT Users". A drop down list of available SRT members will appear for you to choose from.

Submission Form - Reviewable Units

Reviewable Unit	SRT Users
Submission - Summary	cms
	CMS SRT1
Submission - Medicaid State Plan	CMS SRT2
Submission - Public Comment	CMS SRT4
	CMS SRT5
Submission - Tribal Input	CMS SRT6
Submission - SAMHSA Consultation	CMS POC3

Health Homes SPA - Reviewable Units

Reviewable Unit	SRT Users
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	

1.5 Next, set the Milestone Date. This is an internal due date for the SRT members to complete their review. Milestone Dates must follow internal CMS Standard Operating Procedures' (SOP) timeframes.

Milestone Date

Milestone Date *

3/31/2016

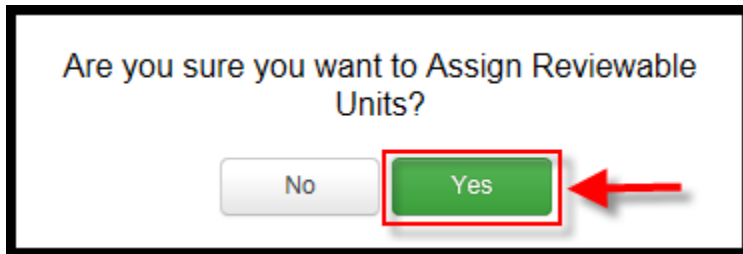**1.6** You may enter instructions for the SRT members in the text box provided.

Instructions

Please complete your review.

**1.7** Select the "Assign Reviewable Units" button in the bottom right-hand corner.

1.8 After selecting this button, a message will appear asking if you want to Assign Reviewable Units. Select "Yes."

Step 2: Submission Review Team-Review Submission Package

2.1 Submission Review Team member logs into MACPro. The CMS Point of Contact is automatically added to the Review Team. The CPOC is assigned to every Reviewable Unit in addition to any assigned SRTs. Only one person (either the CPOC or SRT) needs to review every Reviewable Unit for the unit's review to be complete. Approval, Disapproval and RAI may not move forward unless the review of each Reviewable Unit is complete. The CPOC may also review a Reviewable Unit, if he/she chooses and may reference Reviewing a Submission Package as the CMS Point of Contact for more detailed instructions.

2.2 Select the "Tasks" tab from the upper tool bar. Then select the task labeled "Review Submission Package."
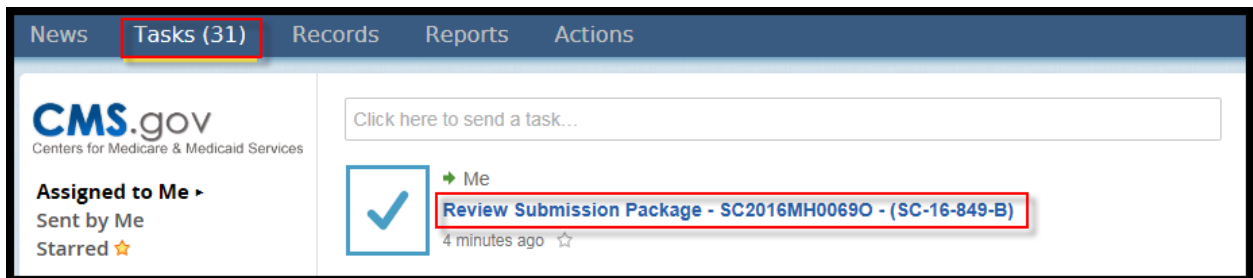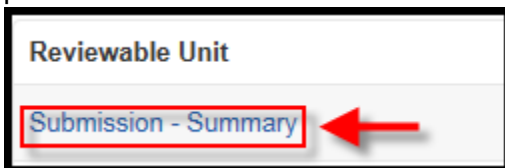
2.3 You will see a list of all Reviewable Units. Your review status will be listed as Not Complete as indicated by the X within a red circle in the "My Review Status" column.

Submission Form - Reviewable Units

Reviewable Unit	My Review Status
Submission - Summary	⊗
Submission - Medicaid State Plan	⊗
Submission - Public Comment	⊗
Submission - Tribal Input	⊗
Submission - SAMHSA Consultation	⊗

Health Homes SPA - Reviewable Units

Reviewable Unit	Proposed Effective Date	My Review Status
Health Homes Intro	3/31/2016	⊗
Health Homes Population and Enrollment Criteria	3/31/2016	⊗
Health Homes Geographic Limitations	3/31/2016	⊗
Health Homes Services	3/31/2016	⊗
Health Homes Providers	3/31/2016	⊗
Health Homes Service Delivery Systems	3/31/2016	⊗
Health Homes Payment Methodologies	3/31/2016	⊗
Health Homes Monitoring, Quality Measurement and Evaluation	3/31/2016	⊗

2.4 Select the link to a Reviewable Unit. This will take you to the page containing data for this particular Reviewable Unit.

Reviewable Unit

Submission - Summary ⬅

2.5 You may select "View All Responses" to expand all sections within the Reviewable Unit.

Submission - Summary
MEDICAID - Health Homes Program - CMS Quick Start Guide - SC - 2016

CMS-10434 OMB 0938-1188

| Not Started | In Progress | Complete |

Package Header

Package ID	SC2016MH0069O	SPA ID	SC-16-849-B
Submission Type	Official - Review 1	Initial Submission Date	3/21/2016
Approval Date	N/A		
Superseding SPA ID	N/A	Effective Date	N/A

View Implementation Guide

View All Responses

2.6 Scroll to the "Review Tool" section and select the +/- buttons to expand the Implementation Guide Review Criteria, Review Assessment and Analyst Notes sections.

Review Tool

Implementation Guide Review Criteria   +/-

Review Assessment   +/-

Analyst Notes   +/-

2.7 Under the Package Header, you may select the link to "View Implementation Guide". This will allow you to open the Implementation Guide for this particular Reviewable Unit.

2.8 In the Review Assessment section, you may select from Sufficient, Insufficient, Unclear, or N/A to describe the state's description and/or answer to this Reviewable Unit. If Sufficient or N/A are chosen, no further clarification is necessary.

2.9 If Insufficient or Unclear are chosen, additional questions are presented. These questions are required fields.

Review Assessment   +/-

The State's description and/or answer is
○ Sufficient
◉ Insufficient
○ Unclear
○ N/A

If this issue is not resolved, what is the likelihood of the potential for disapproval? *
○ None
○ Possible
○ High

Citation
Please enter the information about the potential for disapproval

Character count: 0/4000

Is more information needed to determine if the review criteria have been met? *
○ Yes
○ No

Is your review of this section is complete? *
◉ Yes ○ No

Review Assessment   +/-

The State's description and/or answer is
○ Sufficient
○ Insufficient
◉ Unclear
○ N/A

If this issue is not resolved, what is the likelihood of the potential for disapproval? *
○ None
○ Possible
○ High

Citation
Please enter the information about the potential for disapproval

Character count: 0/4000

Is more information needed to determine if the review criteria have been met? *
○ Yes
○ No

Is your review of this section is complete? *
◉ Yes ○ No

2.10 If you select "Yes" to the question "Is more information needed to determine if the review criteria have been met?" a text box for Justification will be provided. This is a required field.

Is more information needed to determine if the review criteria have been met? *

⦿ Yes
◯ No

Justification

What additional Information is required?

Character count: 0/4000

2.11 Select the radio button next to "Yes" to indicate that your review of this section is complete.

Is your review of this section is complete? *
⦿ Yes   ◯ No

2.12 You may add an Analyst Note by selecting "+ Add Note." If the SRT has informal questions for the state, these questions should be entered as an Analyst Note. The CMS Point of Contact will see these notes and can initiate Clarification, if needed.

Analyst Notes				+/-
ID	Created Date	Details	Note Type	
		No items available		
				+ Add Note

2.13 Type the text of the Analyst Note in the Details text box. Select the Note Type by expanding the drop-down box. You may also reference the Analyst Notes section for descriptions of each note type and further information.

ID	Created Date	Details	Note Type	
2	3/21/2016 1:22 PM EDT		Select Note Type ⌄	✕

2.14 Any existing notes for this Reviewable Unit from other Review Team members, including the CMS Point of Contact, will appear in a table. You may search these notes by details or filter by note type utilizing the text box and drop-down feature.

Search by Details

Filter by Note Type

Show All ⌄

ID	Created By	Created Date	Details	Note Type
1	CMS POC3	3/21/2016 1:20 PM EDT	This is a test note.	For Review Team

2.15 When your review of the Reviewable Unit is complete, select "Save Review Assessment."

Save Review Assessment

2.16 Scroll to the bottom of the page and select "Return to Package Summary."
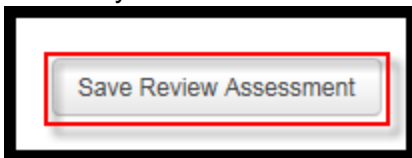
Return to Package Summary
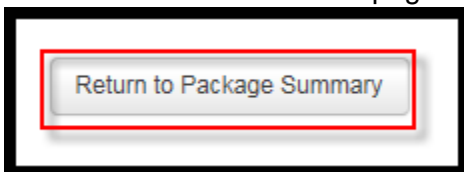
2.17 You will notice that the "My Review Status" column for this Reviewable Unit has now been updated to Complete as indicated by a check mark within a green circle.

Reviewable Unit	My Review Status
Submission - Summary	✅

2.18 Repeat steps 2.8 through 2.16 for each Reviewable Unit. Submission Review Team members should only review the Reviewable Units to which he/she is assigned.

2.19 Once your review of all Reviewable Units are complete, select "Complete Review." BEFORE YOU PROCEED, please be advised that once "Complete Review" is selected, you may not alter your review. If the SRT is unable to complete the review, do not select "Complete Review." The review will be saved within the Tasks tab for the SRT to access at a later date.
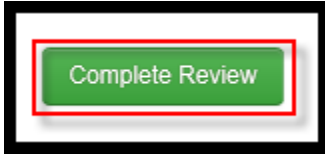
Step 3: CMS Point of Contact- Recommends Approval Disposition and Drafts Approval Notice

3.1 Log in as the CMS Point of Contact.

3.2 Select the "Tasks" tab from the upper tool bar. Select the task labeled "Review Submission Package."
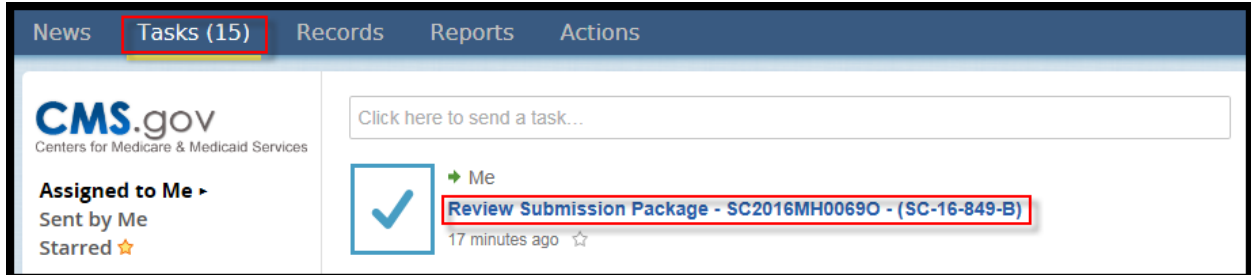
3.3 This will take you to the Summary Page. You will notice that there are two columns indicating your Review Status and the Team Review Status.
   a. A check mark within a green circle in the "My Review Status" column will indicate that your review of that Reviewable Unit is complete.

Submission Form - Reviewable Units		
Reviewable Unit	**My Review Status**	**Team Review Status**
Submission - Summary	✅	✅

   b. An "X" within a red circle will indicate that your review of that Reviewable Unit is not started.

Submission Form - Reviewable Units		
Reviewable Unit	**My Review Status**	**Team Review Status**
Submission - Summary	✅	✅
Submission - Medicaid State Plan	❌	❌

   c.   If there is a green check mark in the "Team Review Status" column, but a red "X" in the "My Review Status" column, this would indicate that another member of the Review Team has completed his/her review of that Reviewable Unit.

Health Homes SPA - Reviewable Units			
Reviewable Unit	**Proposed Effective Date**	**My Review Status**	**Team Review Status**
Health Homes Intro	3/31/2016	❌	❌
Health Homes Population and Enrollment Criteria	3/31/2016	❌	❌
Health Homes Geographic Limitations	3/31/2016	❌	❌
Health Homes Services	3/31/2016	❌	❌
Health Homes Providers	3/31/2016	❌	❌
Health Homes Service Delivery Systems	3/31/2016	❌	✅

d. The column labeled "Team Review Status" needs to have each Reviewable Unit marked in the complete status in order to recommend approval.

Submission Form - Reviewable Units		
Reviewable Unit	**My Review Status**	**Team Review Status**
Submission - Summary	✔	✔
Submission - Medicaid State Plan	✔	✔
Submission - Public Comment	✔	✔
Submission - Tribal Input	✔	✔
Submission - SAMHSA Consultation	✔	✔

Health Homes SPA - Reviewable Units		
Reviewable Unit	**My Review Status**	**Team Review Status**
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	✔	✔

⏮ ◀ 1-8 of 8 ▶ ⏭

3.4 Select "Take Action on Package."

Take Action on Package

3.5 Select "Yes."

Are you sure you want to take action on this package?

No   Yes

26
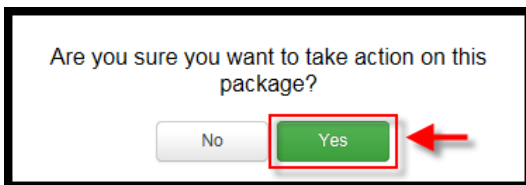
3.6 The CPOC has the options of Requesting Clarification, recommending approval or recommending disapproval of the submission package. Select the radio button next to "Recommend Approval of the Submission Package." You may enter instructions in the Instructions text box.

Choose Action

Available Workflow Actions *
- ○ Request Clarification regarding the Submission Package
- ● Recommend Approval of the Submission Package
- ○ Recommend Disapproval of the Submission Package

Instructions

3.7 Select "Execute Action."

Execute Action

3.8 Select "Yes."

Are you sure you want to Recommend Approval of the Submission Package?

No   Yes

3.9 You will be redirected to your Tasks tab. By selecting "Tasks" on the upper toolbar, your task list will refresh. You will select "Complete Approval Package."

News   Tasks (15)   Records   Reports   Actions

CMS.gov
Centers for Medicare & Medicaid Services

Click here to send a task...

Assigned to Me ▸
Sent by Me
Starred ☆

➜ Me
Complete Approval Package -
Yesterday, 5:35 PM ☆

3.10 This will direct you to the Approval Notice. The information for the Department of Health & Human Services is standard. The information for your state is automatically populated with information pulled from your state's profile within MACPro, along with the Package ID and SPA ID. The Regional Office may still send a formal letter separate from the MACPro system notice to the state.

Approval Notice

+/-

DEPARTMENT OF HEALTH & HUMAN SERVICES
Centers for Medicare & Medicaid Services
7500 Security Boulevard, Mail Stop S2-14-26
Baltimore, Maryland 21244-1850

Date:
Head of Agency: Tracy Training
Title/Dept: Head of State Medicaid Agency
Address 1: 12 Palmetto Drive
Address 2:
City: Charleston
State: SC
Zip: 12345
MACPro Package ID: SC2016MH0069O
SPA ID: SC-16-849-B

3.11 Next, enter a subject in the Subject text box. This is a required field. There is also a field to indicate for which submission package you are recommending approval. This is a required field.

Subject*
Approval Notification

Dear Jane Doe,
This is an informal communication that will be followed with an official communication to the State's Medicaid Director.
The Centers for Medicare and Medicaid Services (CMS) is pleased to inform you that we are recommending approval for your request for
Approval

3.12   The next question asks if you want to enter the same effective date for all the Reviewable Units.

- If "Yes" is chosen, an Effective Date text box will appear with a calendar drop-down box. You may choose a date, and that date will be populated in the Effective Date column for each Reviewable Unit. Please note that a new Health Home SPA approved in MACPro should have the same effective date for all Reviewable Units. Future amendments may have different effective dates for Reviewable Units.
- If "No" is chosen, you may click in the text box in the Effective Date column for each Reviewable Unit and choose an effective date from the calendar drop-down box.

3.13   There is a field to enter more information. This is a required field. This field is where the CPOC may enter Federal Medical Assistance Percentage (FMAP) information. Below that text box is a signature section. The Name and Title text boxes will be grayed out. These will be filled out by the Package Approver later on in the approval process.

Sincerely,

(Name)

(Title)

3.14   By clicking outside of the text box, the "Save" button will become active. You will save your Approval Notice by selecting "Save."
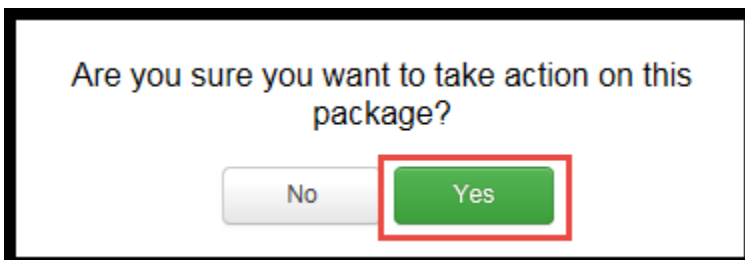
Save   Take Action on Package

3.15   Scroll to the bottom of the page and select "Take Action on Package."

Save   Take Action on Package

3.16   Select "Yes."

Are you sure you want to take action on this package?

No   Yes

3.17 The only Available Workflow Action for the CPOC at this point is to select Senior Managers for Submission Package. Select the radio button next to this action. There is an optional text box to enter Instructions.

Choose Action

Available Workflow Actions *
◉ Select Senior Managers for Submission Package

Instructions

Test Instructions.

3.18 Select "Execute Action."

Execute Action

3.19 Select "Yes."

Are you sure you want to Select Senior Managers for Submission Package?

No   Yes

Step 4: CMS Point of Contact- Selects Senior Managers for Review

4.1 Once you select "Yes" as shown in Step 3.19, you will be redirected to your "Tasks" tab.

4.2 By selecting "Tasks" on your upper toolbar, your task list will refresh. You will select the task labeled "Select Senior Managers".
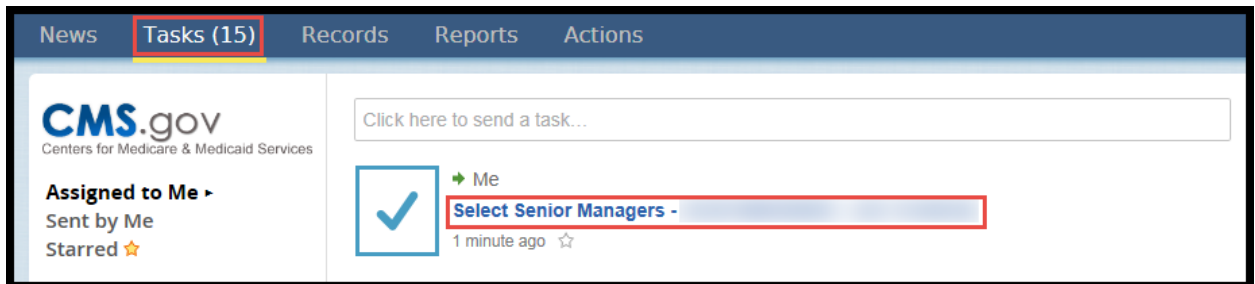
4.3 You will see a list of available Senior Managers in the Senior Managers Distribution List. The information available is the First Name, Last Name, and Email of the users. You may utilize the forward and backward buttons below the table to scroll through the list.

4.4 Select the Senior Manager(s) that you would like to add to the Distribution List by selecting the check box next to his/her name. This action adds a list of Selected Managers below the Distribution List. The CMS Point of Contact may add more than one Senior Manager to review the submission package, but only one Senior Manager is required to review. Senior Managers will be based on Priority Code (Central Office for P1 and P2 SPAs and Regional Office for P3 SPAs).

4.5 Next, you will select a Milestone Date for the Senior Managers to complete this task. The Milestone Date is an internal due date to keep the submission package within the 90-day clock. By clicking in the Milestone Date text box, a calendar drop down will appear allowing you to choose a date. You may also type in a date utilizing the text box.
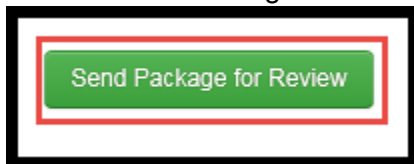
4.6 There is an optional text box for Instructions for the Senior Manager(s).
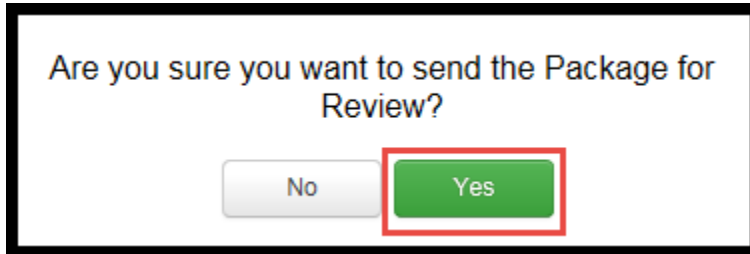
Instructions

4.7 Select "Send Package for Review."

Send Package for Review

4.8 Select "Yes."

Are you sure you want to send the Package for Review?

No   Yes

Step 5: Senior Manager- Reviews Package Disposition

5.1 Senior Manager logs into MACPro.

5.2 Select the "Tasks" tab from the upper tool bar and then select the "Review Submission Package" task.
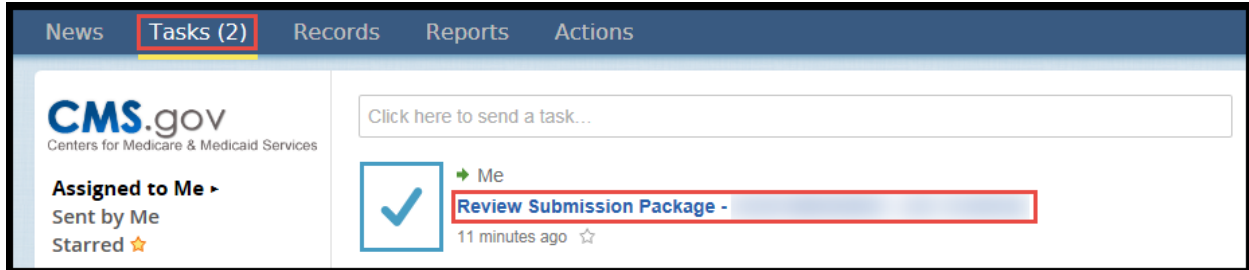
5.3 The Senior Manager will see the CMS Point of Contact's Recommended Disposition below the submission package Audit Information. The approval recommendation will be indicated by a check mark within a green circle.
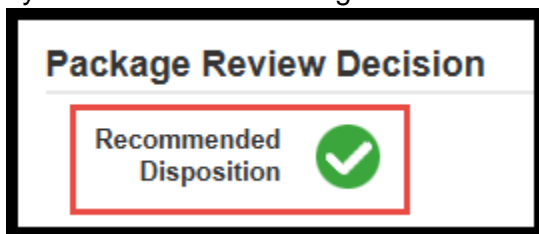
5.4 The Senior Manager will select "Agree" when asked if he/she agrees with the Recommended Disposition. Please note that in the next step, the Package Approver does not have the option to change the Senior Manager's disposition.
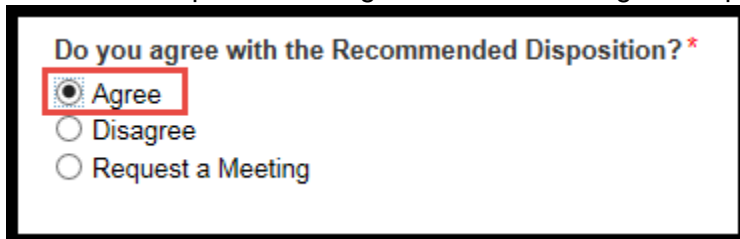
5.5 There is an optional text box for the Senior Manager to leave Instructions for the Package Approver.

5.6 Select "Submit Decision."

5.7 Select "Yes".

Are you sure you want to submit your decision?

No   Yes
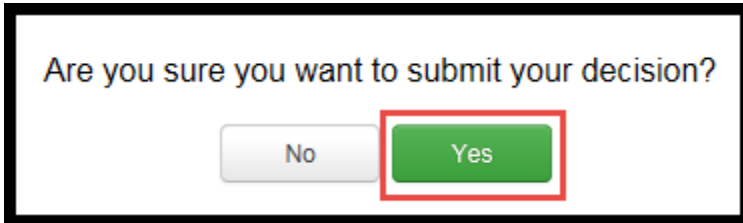
Step 6: Package Approver- Receives and Approves the Package

6.1 Package Approver logs into MACPro.

6.2 Select the "Tasks" tab from the upper tool bar and then select the "Approve Package" task.
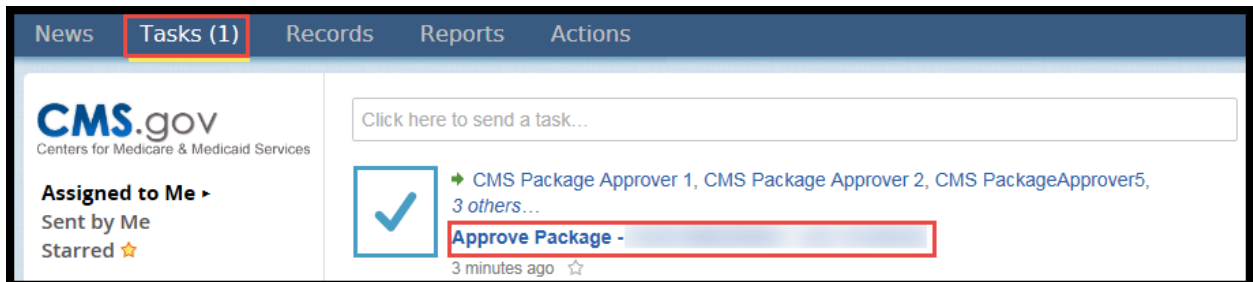
6.3 You must first accept the task by selecting "Accept."

6.4 You will see the Approval Notice that was drafted by the CMS Point of Contact. The top portion will contain pre-populated information. The Department of Health & Human Services information is standard. Your state's information is pulled from the State's profile.

6.5 The lower portion of the Approval Notice will contain the information entered by the CMS Point of Contact as well as the Proposed Effective Dates.

Subject
Approval Notification

Dear Jane Doe,
This is an informal communication that will be followed with an official communication to the State's Medicaid Director.
The Centers for Medicare and Medicaid Services (CMS) is pleased to inform you that we are recommending approval for your request for
Approval
This action is effective as of the dates listed below

Reviewable Unit	Proposed Effective Date
Health Homes Intro	3/31/2016
Health Homes Population and Enrollment Criteria	3/31/2016
Health Homes Geographic Limitations	3/31/2016
Health Homes Services	3/31/2016
Health Homes Providers	3/31/2016
Health Homes Service Delivery Systems	3/31/2016
Health Homes Payment Methodologies	3/31/2016
Health Homes Monitoring, Quality Measurement and Evaluation	3/31/2016

Additional Information.

6.6 The final portion of the Approval Notice is the signature field. Your first and last name will be populated in the Name field. You may edit the Name and Title field.

Sincerely,

CMSPkg Approver4
(Name)

None
(Title)
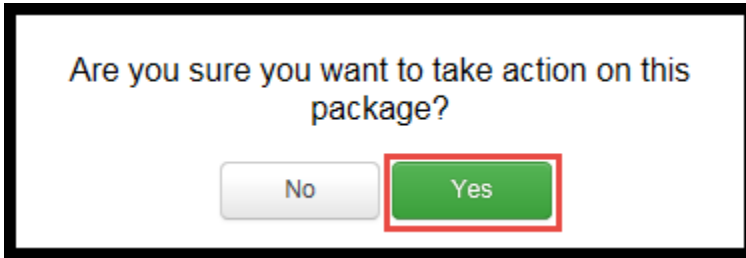
6.7 If edits were made to the Name or Title fields, the Save button will be active. Select "Save."

Save   Request a Meeting   Take Action on Package

6.8 Select "Take Action on Package."

Save   Request a Meeting   Take Action on Package

6.9 Select "Yes."

6.10 The Package Approver only has the option to Approve the Official Submission Package. Select the radio button next to this action. There is also an optional text box to enter Instructions to the CMS Point of Contact.
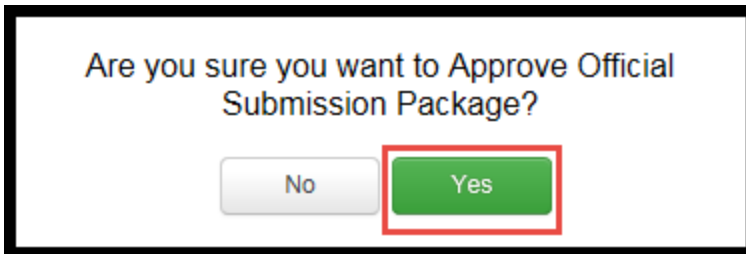
6.11 Select "Execute Action."

6.12 Select "Yes."

Step 7: CMS Point of Contact- Uploads the Approval Documents and Sends Package to S

7.1 CMS Point of Contact logs into MACPro.

7.2 Select the "Tasks" tab from the upper tool bar and then select the "Attach Approval Documentation" task.
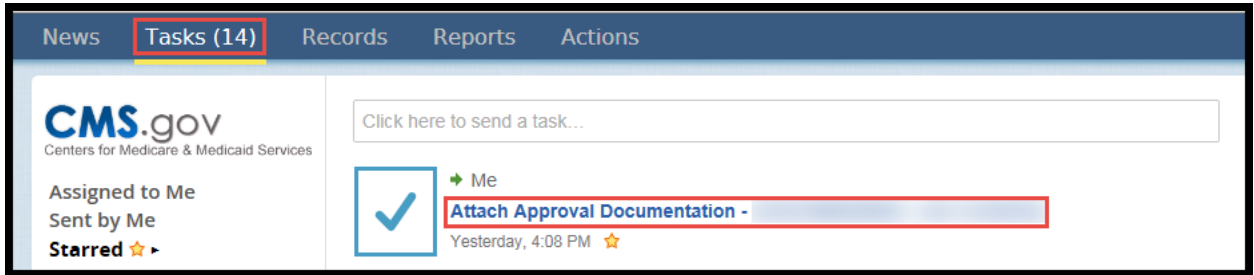
7.3 You will upload copies of approval documentation by selecting "Browse." Select the document you wish to upload. The maximum file size is 2MB. Valid file extensions include pdf, ppt, doc, docx, xlsx, xls, and pptx.
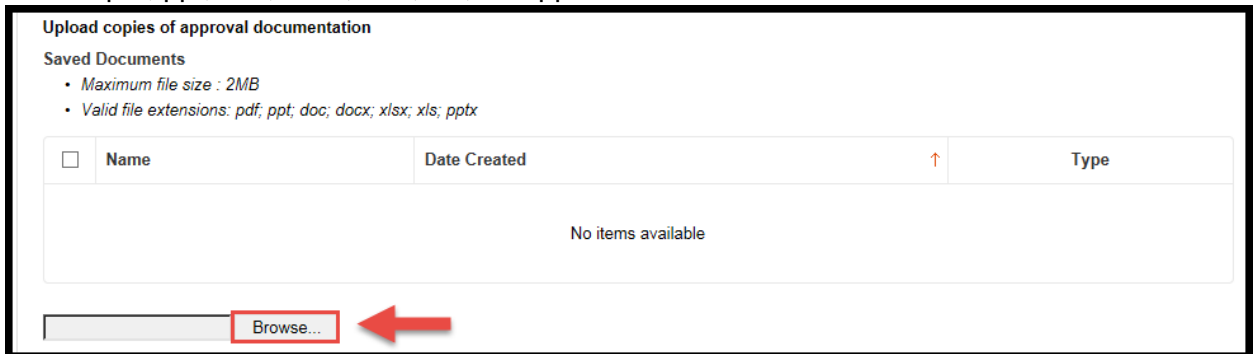
7.4 Your documents will appear below the table. Select "Save Documents."

7.5 You will be directed to a page that indicates your document(s) save is in progress. Select the green "Refresh" button. Once your document(s) are successfully saved, you will continue back to the Attach Approval Documentation screen. Please do not navigate away from this page until your documents have saved successfully. Doing so may cause your task to be delayed.

Document(s) Save in Progress

Your document(s) are currently being saved. Please wait a few seconds, then click refresh to continue.

Refresh
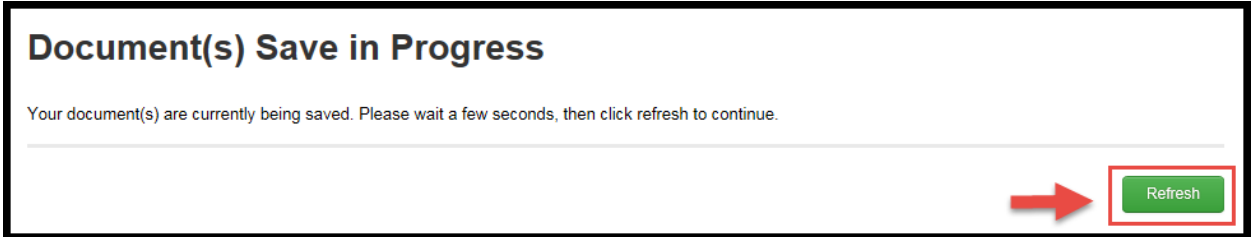
7.6 Select "Take Action on Package."

Take Action on Package

7.7 Select "Yes".

Are you sure you want to take action on this package?

No   Yes
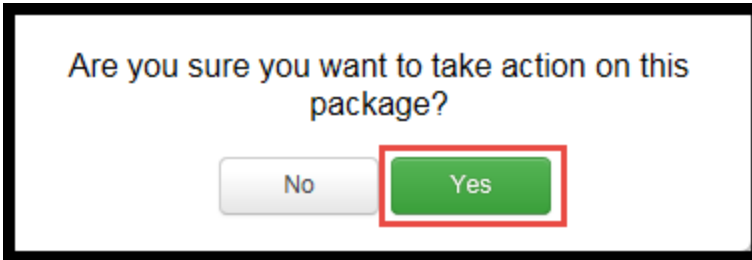
7.8 The only Available Workflow Action as the CPOC is to return the approved submission package to the State Point of Contact for acknowledgement. Select the radio button next to this action. You may also enter instructions for the State Point of Contact in the Instructions text box.

Choose Action

Available Workflow Actions *
◉ Return Approved Submission Package to State POC for Acknowledgment

Instructions

Please acknowledge approval.
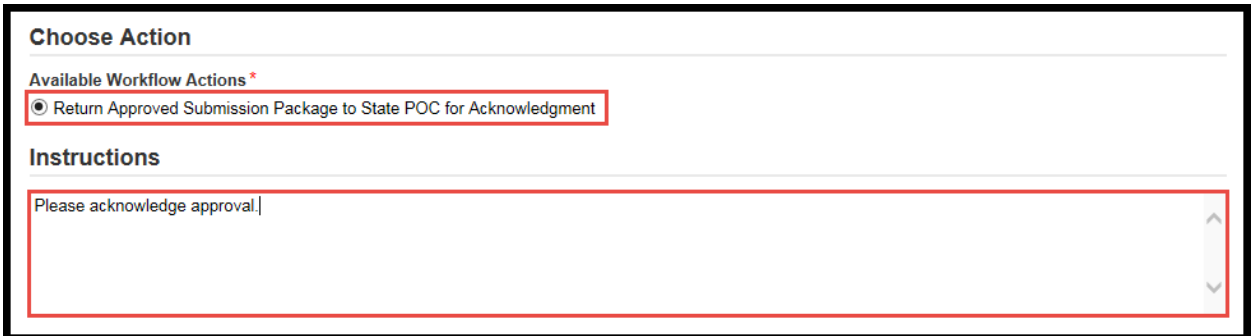
7.9 Select "Execute Action."

Execute Action

7.10 Select "Yes."

Are you sure you want to Return Approved Submission Package to State POC for Acknowledgment?

No Yes

Step 8: CMS Point of Contact- Closes the Submission Package

8.1 After the State acknowledges approval, the CMS Point of Contact logs into MACPro.

8.2 Select the "Tasks" tab from the upper tool bar and then select the "Close Submission Package" task. Please note that this task will not appear until the State Point of Contact has acknowledged approval.
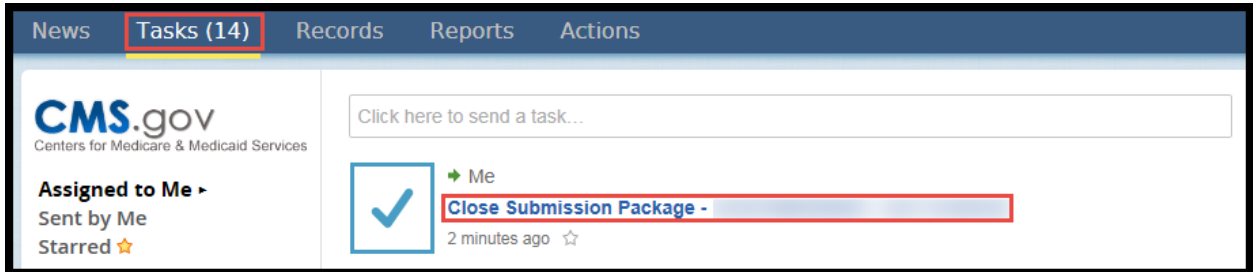
8.3 The only Available Workflow Action is to close the approved submission package.

8.4 Select "Execute Action."

8.5 Select "Yes."
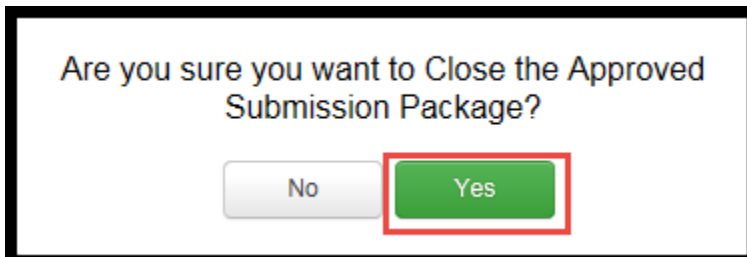
Additional Actions

View Current, Previous, and Future State Plan Content

1. Under the "Records" tab, select "Medicaid State Plan".
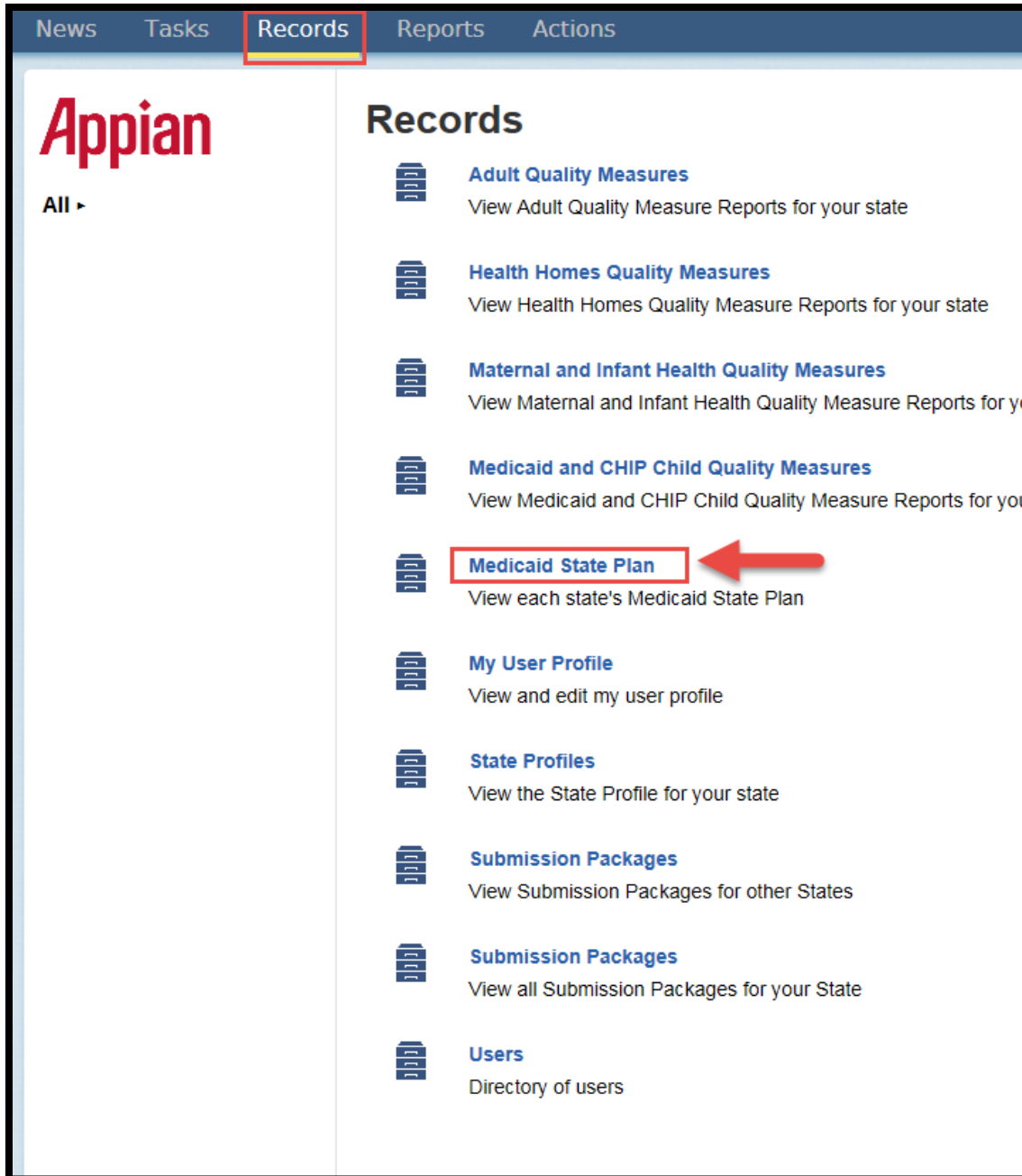
2. Search for your state using the search feature in the left panel.

3. Then select your state by selecting the blue link.

4. On the next screen you will be able to see past, current, and future Health Homes Programs.

Create a Correspondence Log

The Correspondence Log is the official record for the package. The Correspondence Log can be used as a communication tool, where CMS provides information to the state and the state can respond. The Correspondence Log may also be used to track conversations for future reference. Only the SPOC and the CMS Point of Contact can write in the correspondence log, but others may view the correspondence log in a package for reference.

1. Select the "Records" tab from the upper tool bar, and then select "Submission Packages-View all Submission Packages."

2. Next, select your Package ID.

Submission Packages

UT - Submission Package -
Package Status: Approved
Submitted Date: 12/31/2015
Package Disposition: Approved

Thursday, 12:00 AM

SC - Submission Package -
Package Status: Closed
Submitted Date: 3/21/2016
Package Disposition: Approved

Wednesday, 11:24 AM

3. You will be taken to the Summary screen of your package. Select "Related Actions" from the left panel.

CMS.gov
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Summary ▶
News
Related Actions
Reviewable Units

4. Next, select "Create Correspondence Log"
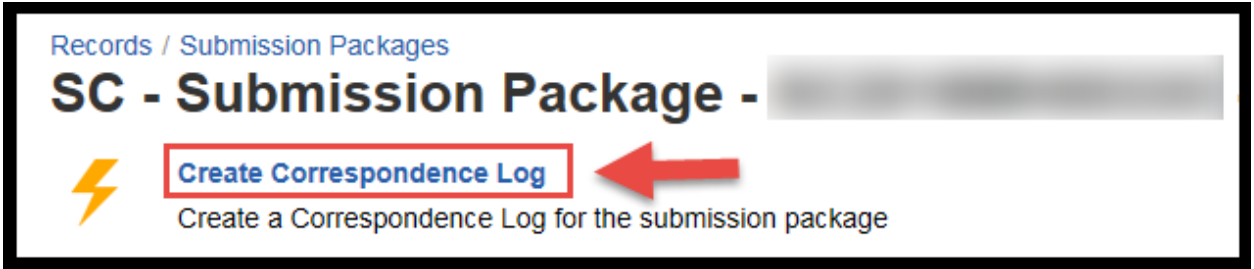
5. Enter in your information and then select "Create Correspondence Log." Once an entry has been made to the Correspondence Log, it cannot be edited.

6. If you should need to add an entry, follow steps 1 through 4 and then select "Add Entry to Correspondence Log".

7. On the next screen, fill in your entry and then select "Add Entry to Correspondence Log".

8. After a Correspondence Log is created, you may add an entry by selecting "Correspondence Log" from the left hand panel.

9. Select "Add Entry to Correspondence" in the top right corner.

10. Fill in your entry information and then select "Add Entry to Correspondence".

Reviewing a Submission Package with Amendments

1. Log in as CMS Point of Contact or Submission Review Team.

2. Select "Tasks" from the upper tool bar. Select the task labeled "Review Submission Package."

3. When the state creates an amendment, all Submission Form-Reviewable Units are included. Only the Health Homes SPA-Reviewable Units that the state is amending will show up for your review.

4. The column labeled "Other Approved Version" will let you know if the Reviewable Unit listed has another approved version. If you hover over the empty circle image in the "Other Approved Version" column, a message appears indicating "Reviewable unit does not have another approved version with future effective date". You may use this information for your reference. Please Note: This indicator will only be flagged if there is another approved Submission package with a future effective date.

5. When reviewing the Submission-Medicaid State Plan Reviewable Unit, you will see further indicators. This is important for version control and can be used for your reference. The filled in black circle image indicates that the Reviewable Unit is included in another submission package that has not yet been dispositioned. Please Note: These indicators will only be flagged if there is another submission package with the same Reviewable Unit included either being worked on by the State or in CMS review.


6. If the state can't wait for a current review of an amendment with a specific reviewable unit to be complete due to an effective date, this new amendment (with the same reviewable unit) will not include the information within the Reviewable Unit from the submission that is currently under review. To avoid overwriting, the state has a few options (keep in mind, this only applies to when both amendment submissions are impacting the same Reviewable Unit):

   a. *Copy the information from the first submission Reviewable Unit (the amendment under review) into the second amendment Reviewable Unit prior to submitting it. (Assuming that the amendment currently under review will be approved prior to the amendment you are currently submitting).*

   b. *After submitting the second amendment and before CMS approves it, CMS will need to send the submission package back via Clarification or RAI so that the State can include the information from the first submission into the second (this is only the case for when a reviewable unit is in both amendment submission packages and when the first submission package is approved first).*

   c. *Submit the second amendment without including the information from the first amendment (this is only the case for when the same Reviewable Unit is in both submissions). If the second amendment is approved first. The first amendment, will need to be sent back to the state via Clarification or RAI to include the information from the second amendment, where applicable in the same Reviewable Unit, to avoid overwriting.*

Reviewing a Submission Package as the CMS Point of Contact

This section goes into detail on how to review the submission package as the CMS Point of Contact. This process is slightly different than for Submission Review Team members.

1. Log in as CMS Point of Contact.

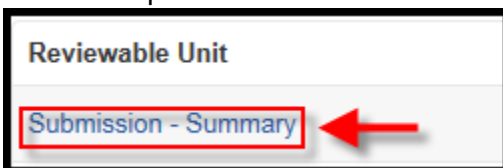**2.** Select "Tasks" from the upper tool bar. Select the task labeled "Review Submission Package."
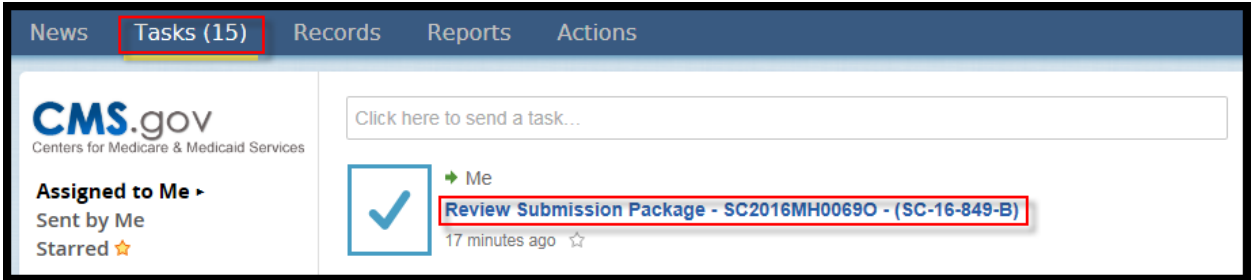
3. This directs you to the Summary Page. You will notice that there are two columns indicating your Review Status and the Team Review Status. A clock icon will indicate that the review of that Reviewable Unit is in progress. A check mark within a green circle will indicate that the review of that Reviewable Unit is complete.

4. All Reviewable Units with a review that has not yet been started will be indicated by an X within a red circle.

5. To help determine which Reviewable Units need to be reviewed, the CPOC may access the Analyst Notes and Review Tool Report to see the SRT members' review. Select the link to a Reviewable Unit. This will take you to the page containing data for this particular Reviewable Unit.

6. You may select "View All Responses" to expand all sections within the Reviewable Unit.

7. Scroll to the "Review Tool" section and select the +/- button to expand the Implementation Guide Review Criteria, Review Assessment, Complete SRT Review Assessments, and Analyst Notes sections.

8. Under the Package Header, you may select the link to View Implementation Guide. This will allow you to open the Implementation Guide for this particular Reviewable Unit.

9. In the Review Assessment section, you may select from Sufficient, Insufficient, Unclear, or N/A to describe the state's description and/or answer to this Reviewable Unit. If Sufficient or N/A are chosen, not further clarification is necessary.

10. If Insufficient or Unclear are chosen, additional questions are presented. These questions are mandatory.

Review Assessment   +/-

The State's description and/or answer is

○ Sufficient
◉ Insufficient
○ Unclear
○ N/A

If this issue is not resolved, what is the likelihood of the potential for disapproval? *

○ None
○ Possible
○ High

Citation
Please enter the information about the potential for disapproval

[   ]

Character count: 0/4000

Is more information needed to determine if the review criteria have been met? *

○ Yes
○ No

Is your review of this section is complete? *
◉ Yes   ○ No

Review Assessment   +/-

The State's description and/or answer is

○ Sufficient
○ Insufficient
◉ Unclear
○ N/A

If this issue is not resolved, what is the likelihood of the potential for disapproval? *

○ None
○ Possible
○ High

Citation
Please enter the information about the potential for disapproval

[   ]

Character count: 0/4000

Is more information needed to determine if the review criteria have been met? *

○ Yes
○ No

Is your review of this section is complete? *
◉ Yes   ○ No

11. If you select "Yes" to the question "Is more information needed to determine if the review criteria have been met?" a text box for Justification will be provided. This field is mandatory.

12. Select the radio button next to "Yes" to indicate that your review of this section is complete.

13. Under the Completed SRT Review Assessments section, you will see the Reviewer, Assessment Date and Review Assessment related to this Reviewable Unit.

14. You may add an Analyst Note by selecting "+ Add Note."
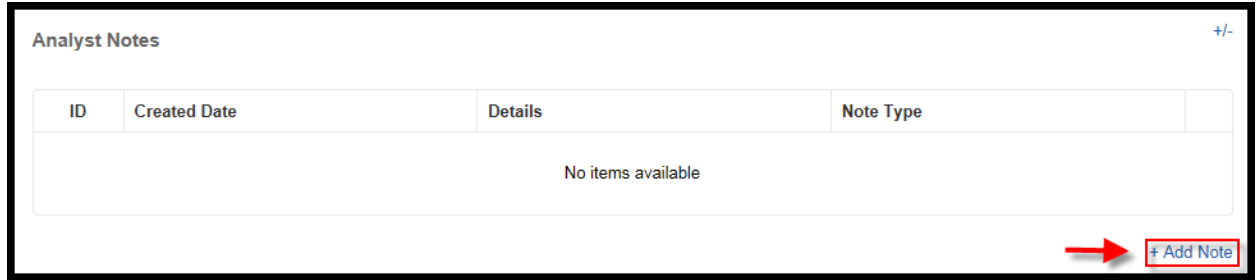
Analyst Notes				+/-
ID	Created Date	Details	Note Type	
		No items available		

+ Add Note

15. Type the text of the Analyst Note in the Details text box. Select the Note Type by expanding the drop-down box.

ID	Created Date	Details	Note Type	
2	3/21/2016 1:22 PM EDT		Select Note Type	✕

16. Any existing notes for this Reviewable Unit from other Review Team members will appear in a table. You may search these notes by details or filter by note type utilizing the text box and drop-down feature.

Search by Details

Filter by Note Type
Show All

ID	Created By	Created Date	Details	Note Type
2	CMS SRT2	3/21/2016 1:22 PM EDT	test	For Review Team
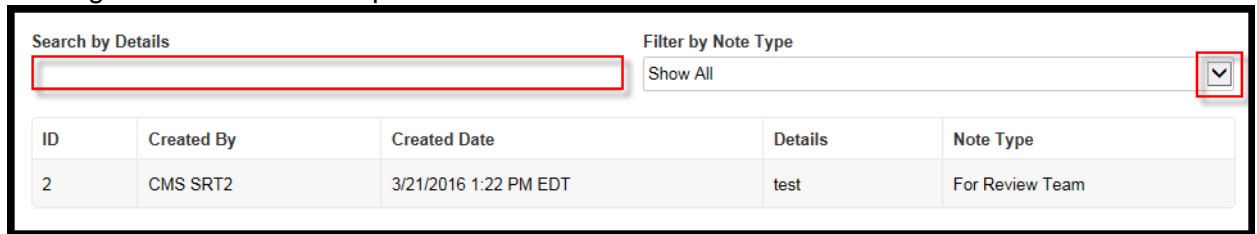
17. When your review of the Reviewable Unit if complete, select "Save Review Assessment."

Save Review Assessment

18. Scroll to the bottom of the page and select "Return to Package Summary."
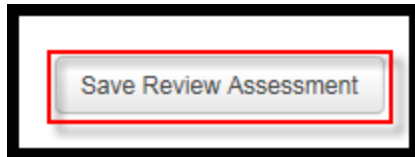
Return to Package Summary
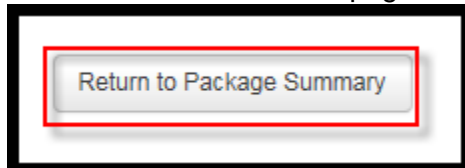
19. You will notice that the "My Review Status" column for this Reviewable Unit has now been updated to Complete as indicated by a check mark within a green circle.

Reviewable Unit	My Review Status	Team Review Status
Submission - Summary	✅	✅

20. Repeat steps 5 through 18 for each Reviewable Unit. The review is complete when the Team Review Status column has all Reviewable Units marked complete.

Submission Form - Reviewable Units

Reviewable Unit	My Review Status	Team Review Status
Submission - Summary	✅	✅
Submission - Medicaid State Plan	✅	✅
Submission - Public Comment	✅	✅
Submission - Tribal Input	✅	✅
Submission - SAMHSA Consultation	✅	✅

Health Homes SPA - Reviewable Units

Reviewable Unit	Proposed Effective Date	My Review Status	Team Review Status
Health Homes Intro	3/31/2016	✅	✅
Health Homes Population and Enrollment Criteria	3/31/2016	✅	✅
Health Homes Geographic Limitations	3/31/2016	✅	✅
Health Homes Services	3/31/2016	✅	✅
Health Homes Providers	3/31/2016	✅	✅
Health Homes Service Delivery Systems	3/31/2016	✅	✅
Health Homes Payment Methodologies	3/31/2016	✅	✅
Health Homes Monitoring, Quality Measurement and Evaluation	3/31/2016	✅	✅

1-8 of 8

21. Select "Take Action on Package."

Take Action on Package

22. Select "Yes."
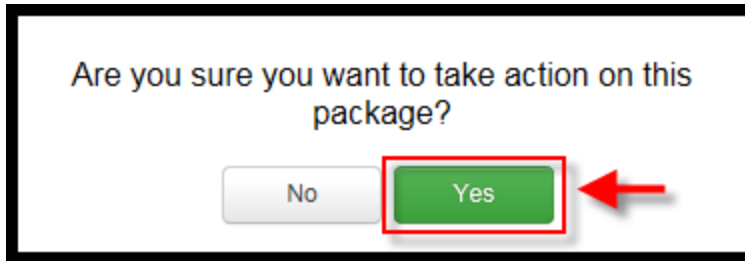
Review Tool Report

1. Log in as the CMS Point of Contact or Submission Review Team member.

2. Go to the "Records" tab and then select Submission Packages-"View all Submission Packages."

3. Select the link to the submission package.

Submission Packages

SC — Submission Package - SC2016MH0069O - (SC-16-849-B)

Package Status: Review
Submitted Date: 3/21/2016

2 hours ago

4. Select "Review Tool Report" from the left-hand menu.

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Summary ▸
News
Related Actions
Reviewable Units
Analyst Notes
Review Tool Report

5. You may sort the reviews of all Review Team members by Package Reviewable Unit, Reviewer, Reviewable Unit Assessment Value, or Note/Assessments by utilizing the drop-down boxes.

Records / Submission Packages

SC - Submission Package - SC2016MH0069O - (SC-16-849-B) [Follow]

MACPro Package Submission Review Tool Report

Submission Package ID	SC2016MH0069O	SPA ID	SC-16-849-B
		Current Date	3/21/2016
Package Type	Official	Package Submitted Date	3/21/2016
Package Status	Review		

Package Reviewable Unit

All [▾]

Reviewer

All [▾]

Reviewable Unit Assessment Value

All [▾]

Note / Assessments

Both [▾]

6. You have the ability to export this report to Excel by selecting "Export to Excel."
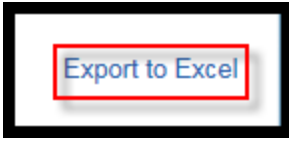
Analyst Notes

1. The CMS Point of Contact or Submission Review Team members may add Analysts Notes through the Review Tool. The types of notes available are referenced in a table below. You will start by logging in as the CMS Point of Contact or Submission Review Team member.

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

2. Go to the "Records" tab and then select Submission Packages-"View all Submission Packages."

3. Select the link to the submission package.

4. Select "Analyst Notes" from the left-hand menu.
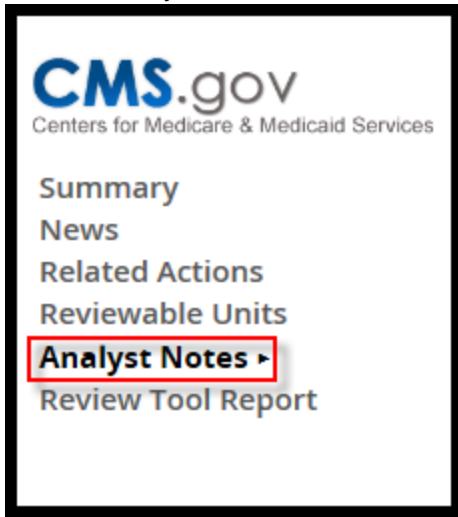
5. You have the ability to search the Analyst Notes entered by Review Team members by utilizing the Search by Details text box. You may also filter by Note Type or Reviewable Unit with the drop-down boxes.

Requesting Clarification

1. After the CMS Point of Contact has reviewed the submission package, he/she has the option to request Clarification regarding the submission package.

2. Clarification questions are entered into the Correspondence Log. The CPOC can compile questions from the Submission Review Team members by accessing the Analyst Notes. To enter information into the Correspondence Log, see the instructions to Create a Correspondence Log.

**3.** After taking Action on the Package, select the radio button next to "Request Clarification regarding the Submission Package" under Available Workflow Actions. You may enter instructions for the State Point of Contact in the Instructions text box.

Choose Action

Available Workflow Actions *
- ◉ Request Clarification regarding the Submission Package
- ○ Recommend Approval of the Submission Package
- ○ Recommend Disapproval of the Submission Package
- ○ Request Additional Information regarding the Submission Package

Instructions

See Clarification Questions in the Correspondence Log.

4. Select "Execute Action."

Execute Action

5. Select "Yes."

Are you sure you want to Request Clarification regarding the Submission Package?
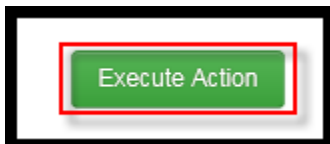
No   Yes
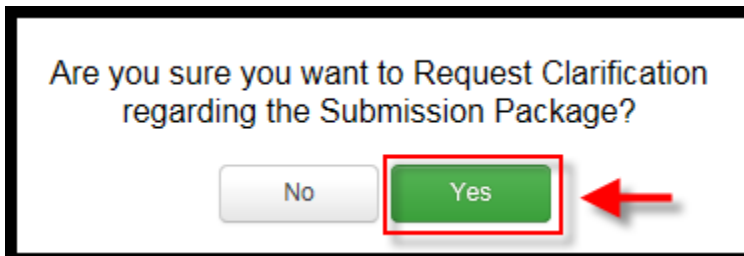
6. After the state has responded to Clarification, the CMS Point of Contact must assign Submission Review Team members to Reviewable Units again and review the submission package again. You will have a task in your Tasks tab to perform these actions.

Preventing Package Submission

1. After requesting Clarification, CMS has the option to prevent package submission. This is a way for CMS to pull the package back from the Clarification request. Start by logging in as the CMS Point of Contact.

2. Go to the "Records" tab and then select Submission Packages-"View all Submission Packages."

3. Select the link to the submission package.

4. Select "Related Actions" from the left-hand menu.

5. Select "Prevent Package Submission."
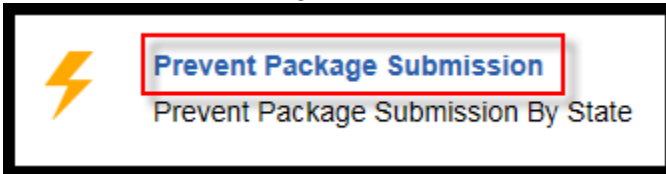
6. The only Available Workflow Action is to "Prevent Package Submission by State." Make sure that the radio button is selected next to this action. You may enter instructions in the text box.

7. Select "Take Action on Package."

8. Select "Yes."
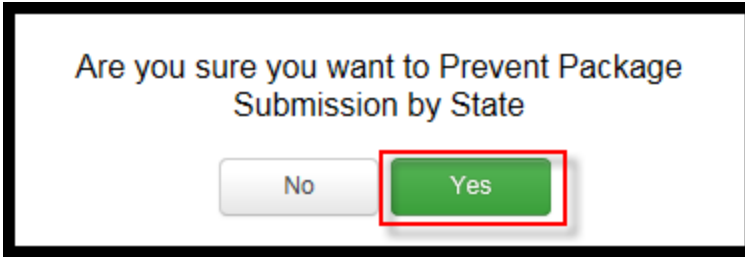
9. After refreshing your Tasks list, a new task will appear to Assign Reviewable Units to SRTs. You must assign SRTs to Reviewable Units again and set the Milestone Date after pulling back the Clarification request.
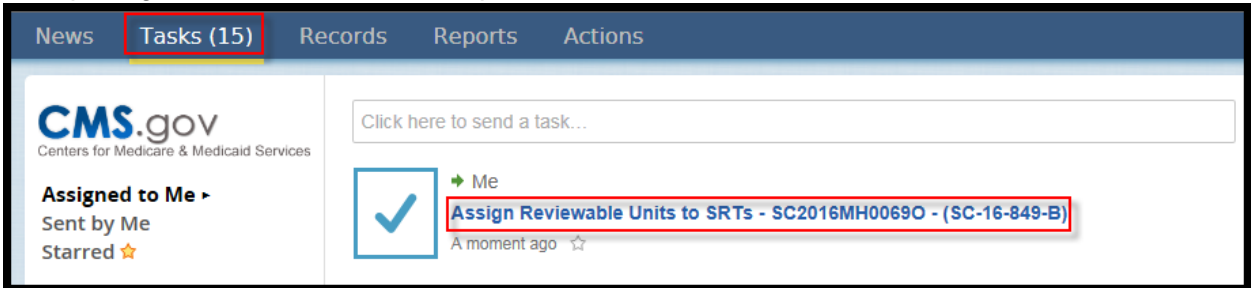
Requesting Additional Information, or RAI

1. After the CMS Point of Contact has reviewed the submission package, he/she has the option to Request Additional Information regarding the submission package. All Reviewable Units must be marked in the complete status by at least one Review Team member in order to initiate RAI.

2. After taking Action on the Package, select the radio button next to "Request Additional Information regarding the Submission Package" under Available Workflow Actions.
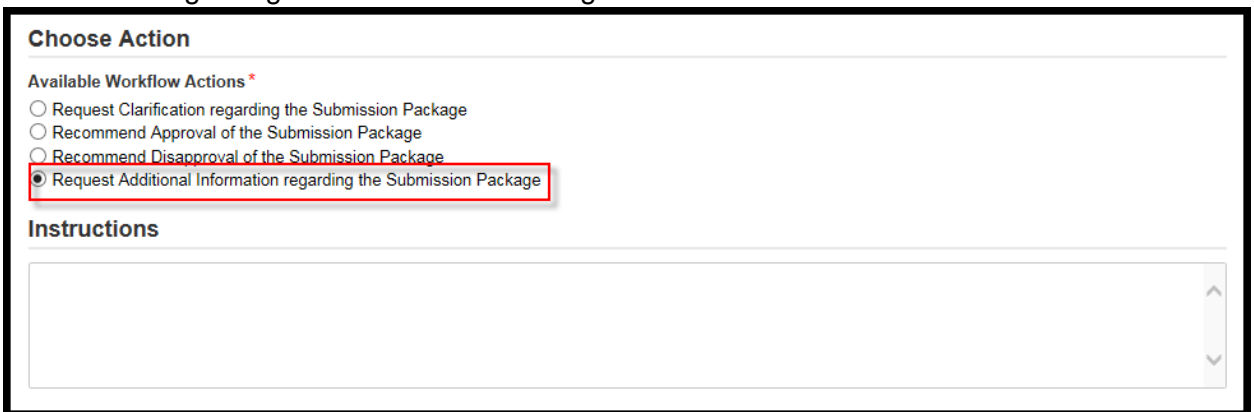
3. Select "Execute Action."

4. Select "Yes."
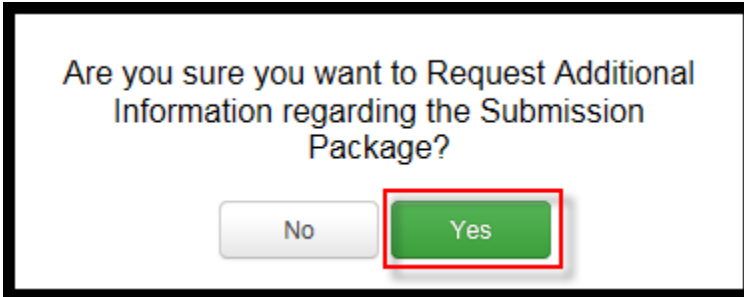
5. You will be redirected to your Tasks list. You may refresh your Tasks list by selecting "Tasks" on the upper tool bar. Next, select the task labeled "Request Additional Information."
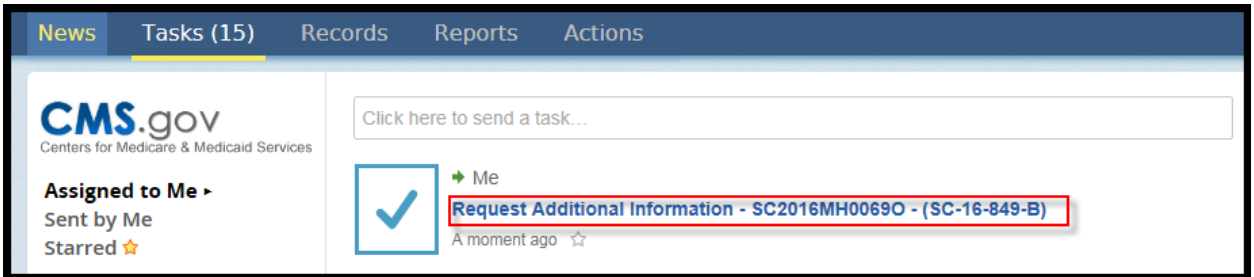
6. This will bring you to the RAI Form where you will detail your questions for the state. The RAI questions are only visible to the CPOC, so please make sure that all RAI questions are reviewed by the appropriate managers before submitting to the state. The Reference, CMS question to the State, and Policy/Regulation fields are all mandatory to complete.

7. Select "Save Question.
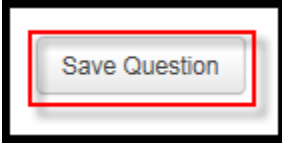
8. All questions that are entered will appear in a table labeled "All Questions."

All Questions

Click on a question ID to modify the saved question

Question ID ↑	Reference	CMS question to the State	Policy/Regulation
1	Reference Question	Are you sure these are correct?	Policy Name

9. By selecting the link to the Question ID, you will have the option to edit the Question and save. You may also delete the question by selecting "Delete Question."
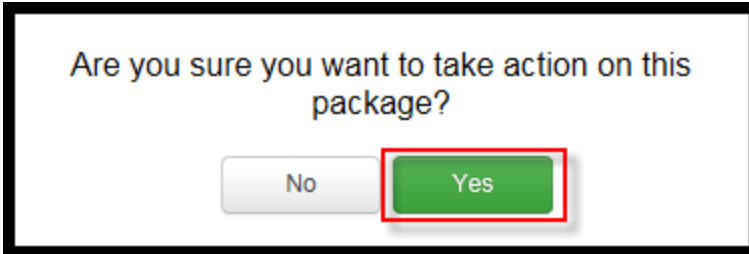
All Questions

Click on a question ID to modify the saved question

Question ID ↑	Reference	CMS question to the State	Policy/Regulation
1	Reference Question	Are you sure these are correct?	Policy Name

Question Details

Question 1

Reference *

Reference Question

CMS question to the State *

Are you sure these are correct?

Policy/Regulation *

Policy Name

Save Question   Delete Question

10. After all questions have been entered into the RAI Form, select "Take Action on Package."

Take Action on Package

11. Select "Yes."

Are you sure you want to take action on this package?

No   Yes

12. This will redirect you to the Take Action on the Package page. Under "Available Workflow Actions," select the radio button next to "Send RAI to the State." You may also enter Instructions to the State Point of Contact in the Instructions text box.

Choose Action

Available Workflow Actions *
◉ Send RAI to the State

Instructions

Please see RAI Form.

13. Select "Execute Action."

Execute Action

14. Select "Yes."

Are you sure you want to Send RAI to the State?

No   Yes

Extend RAI Period

1. The CMS Point of Contact has the ability to update the existing RAI Period while the submission package is in RAI.   CMS does not need to recall the package. Start by logging in as the CMS Point of Contact.

2. Go to the "Records" tab and then select Submission Packages-"View all Submission Packages."

3. Select the link to the submission package.

4. Select "Related Actions" from the left-hand menu.

5. Select "Extend RAI Period."

6. This page will tell you the Current End of the RAI Period. You may enter the number of days by which you want to extend the RAI Period in the "Days to Extend" text box.

Extend RAI Period

Enter how many days you would like to extend the RAI period. Number of days may not exceed 999.

Package Information

Package ID	SC2016MH0069O	Submission Type	Official
Program Name	CMS Quick Start Guide	State	SC
SPA ID	SC-16-849-B	Region	Atlanta, GA
Version Number	2	Package Status	RAI
Submitted By	State POC 1 SC	Submission Date	3/21/2016
		RAI Period	90 days remain
			Awaiting State Response
		Review Status	RAI

View Entire Package

Current End of RAI Period
6/19/2016

Days to Extend *
1

7. Select "Update RAI Period."

Viewing the State's response to Request Additional Information, or RAI

1. After the state has responded to RAI, CMS must re-review the submission package. Start by logging in as the CMS Point of Contact or Submission Review Team member.

2. Select "Tasks" on the upper tool bar. Select the task labeled "Review Submission Package"
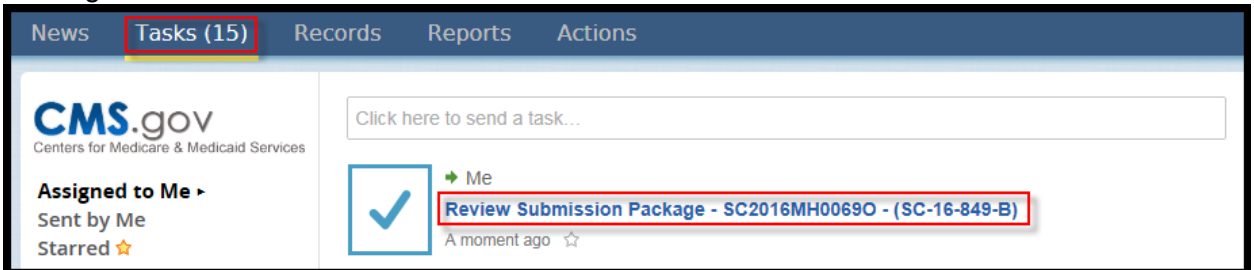
3. Scroll to the bottom of the page and select "View RAI Response."
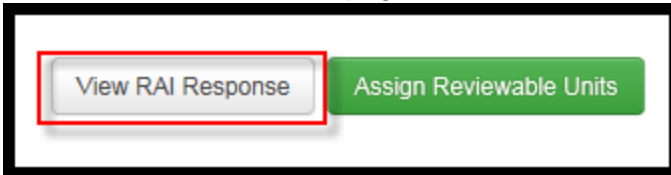
4. You will see all of the questions entered into the RAI Form along with the State's Response.
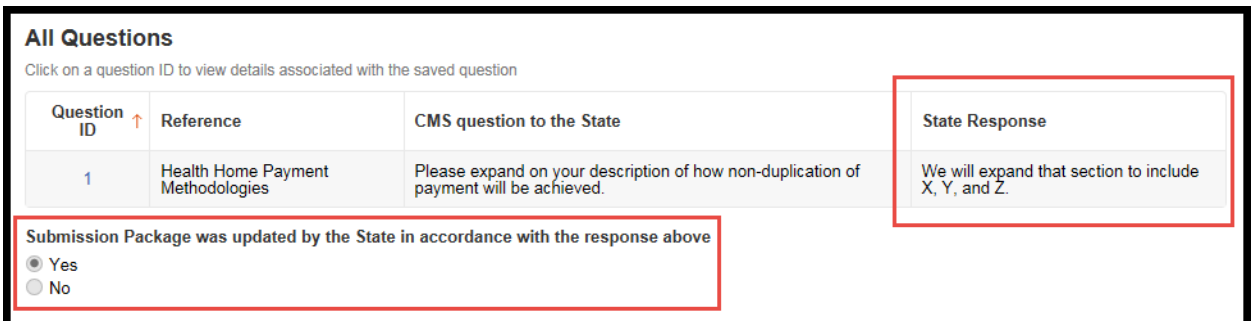
5. After reviewing the state's response, select "Return to Assignment" to complete your review of the submission package.
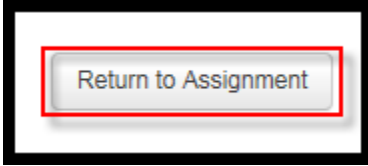
Compare Doc Report

1. After the state has responded to Clarification or RAI, CMS has the ability to see what Reviewable Units have been edited within the submission package. Start by logging in as the CMS Point of Contact or Submission Review Team member.

2. Select "Records" from the upper tool bar. Select "Submission Packages-View All Submission Packages."

3. Select the submission package.

4. From the left-hand tool bar, select "Compare Doc Change Report."

5. Reviewable Units that have been edited by the state are indicated by a check mark within a green circle.

Compare Doc

1. While reviewing a Reviewable Unit, the CMS Point of Contact or the Submission Review Team member has access to a feature that will tell him/her exactly what fields were edited by the state during Clarification or RAI. Start by logging in as the CMS Point of Contact or Submission Review Team member.

2. Select the "Tasks" tab from the upper tool bar. Select the task labeled "Review Submission Package."

3. Select the link to the Reviewable Unit that needs to be re-reviewed.

4. Below the Audit Information, select "View Compare Doc."
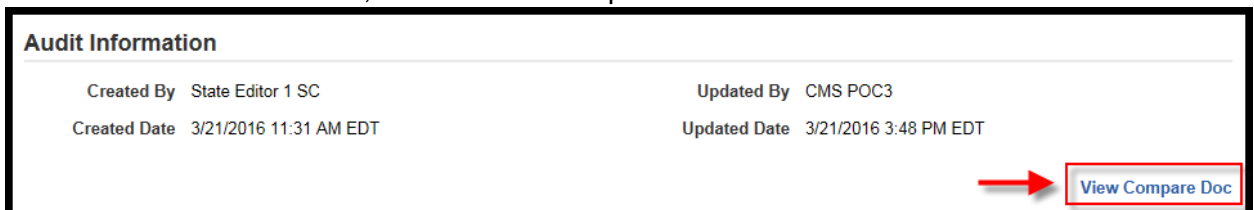
5. New fields will expand detailing the Field Name, Old Value, Change Type, and New Value for all edits made within the Reviewable Unit by the state.

Compare Doc: Health Homes Geographic Limitations

Previous Version 1   Current Version 2

Field Name	Old Value	Change Type	New Value
Service Availability	Health Homes services will be available statewide	✏️	Health Homes services will be limited to the following geographic areas
Specify the geographic limitations of the program		+	By county
Specify which counties		+	Anderson

Documents Added or Removed

Document Name	↓	Change Type
No items available		

6. In the Change Type column, different icons will appear to detail the method that was used to edit this particular field. If you hover your mouse over the icon, a description of the icon will appear. A pencil icon will indicate and update. A blue addition symbol will indicate that values were inserted in this field.

Field Name	Old Value	Change Type	New Value
Service Availability	Health Homes services will be available statewide	✏️	Health Homes services will be limited to the following geographic areas
Specify the geographic limitations of the program		+	By county
Specify which counties		+	Anderson

7. Below, there will be an additional table to indicate whether documents were added or removed from the Reviewable Unit.

Documents Added or Removed

Document Name	↓	Change Type
No items available		

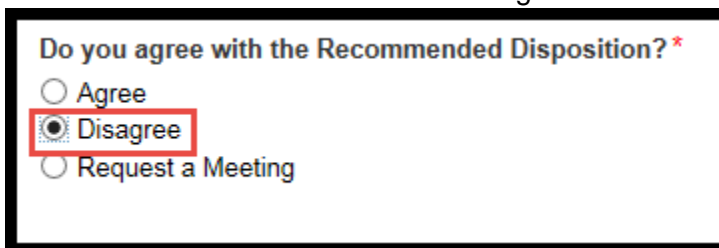## Senior Manager Disagrees with the Recommended Disposition

1. The Senior Manager will select the Task in his/her Task list to "Review Submission Package."
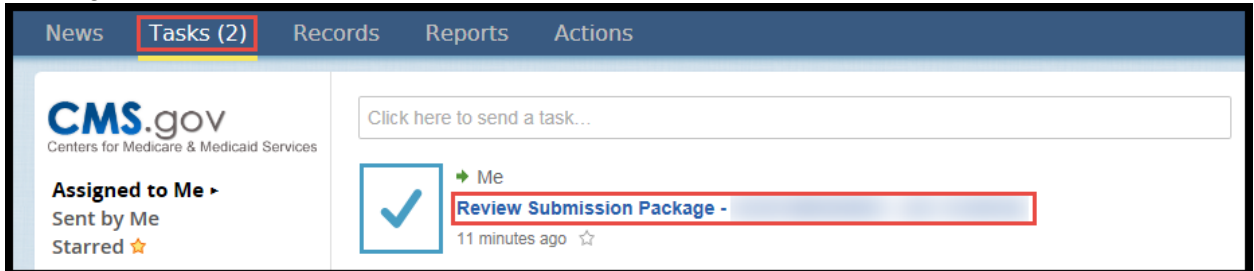
2. The Senior Manager will see the CMS Point of Contact's Recommended Disposition below the submission package Audit Information. The approval recommendation will be indicated by a check mark within a green circle.
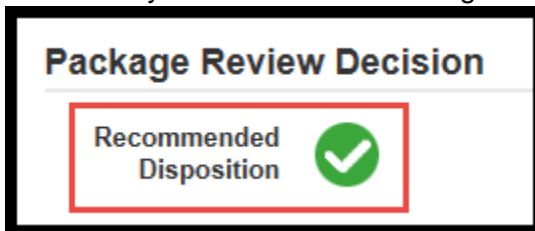
3. When asked if the Senior Manager agrees with the Recommended Disposition, he/she will select the radio button next to "Disagree."

4. There is an optional text box for the Senior Manager to leave Instructions for the CMS Point of Contact.

5. Select "Submit Decision."

6. The CMS Point of Contact will receive a task in his/her Task list to Assign Reviewable Units to SRTs. The CMS Point of Contact and Submission Review Team members will review the submission package again and provide a new disposition. The submission package may need to be sent back to the state for edits, and the CMS Point of Contact may do so by Requesting Clarification or Requesting Additional Information, or RAI.

Senior Manager Requests A Meeting

1. The Senior Manager will select the Task in his/her Task list to "Review Submission Package."
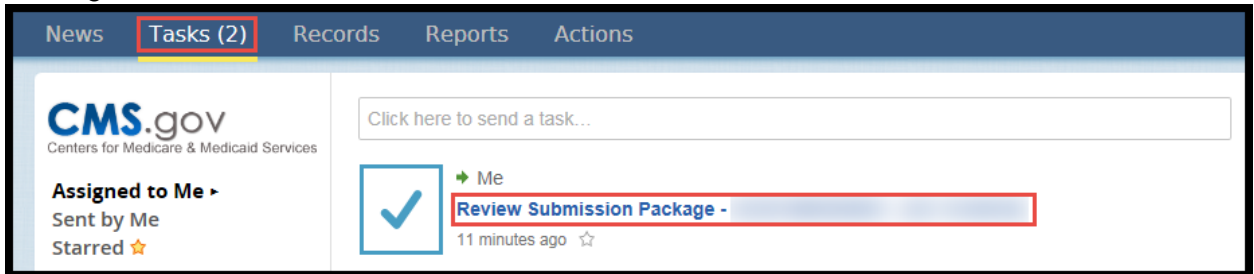
2. The Senior Manager will see the CMS Point of Contact's Recommended Disposition below the submission package Audit Information. The approval recommendation will be indicated by a check mark within a green circle.
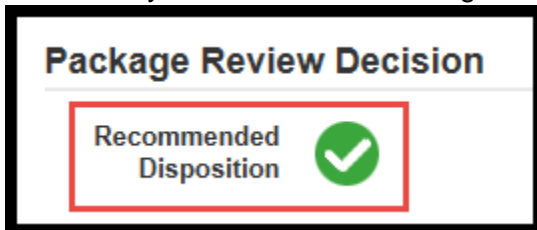
3. When asked if the Senior Manager agrees with the Recommended Disposition, he/she will select the radio button next to "Request a Meeting."
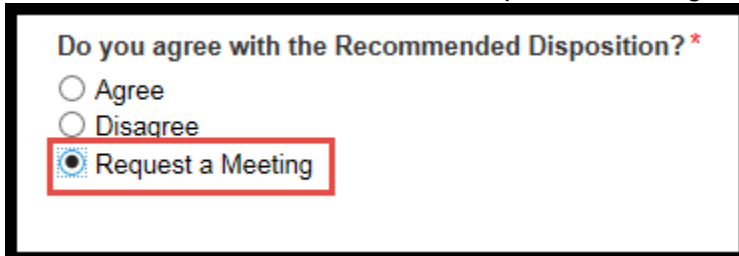
4. There is an optional text box for the Senior Manager to leave Instructions for the CMS Point of Contact.

Instructions

Test Instructions.

5. Select "Submit Decision."

Submit Decision

6. The CMS Point of Contact will receive a task in his/her Task list to Conduct a Brief Meeting. The CMS Point of Contact and Submission Review Team members will review the submission package again and provide a new disposition. The submission package may need to be sent back to the state for edits, and the CMS Point of Contact may do so by Requesting Clarification.

Package Approver Requests a Meeting

1. Package Approver logs into MACPro.

2. Select the "Tasks" tab from the upper tool bar and then select the "Approve Package" task.

| News | Tasks (1) | Records | Reports | Actions |

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Centers for Medicare & Medicaid Services

Click here to send a task...

Assigned to Me ▸
Sent by Me
Starred ☆

✔ → CMS Package Approver 1, CMS Package Approver 2, CMS PackageApprover5, 3 others...
Approve Package -
3 minutes ago ☆
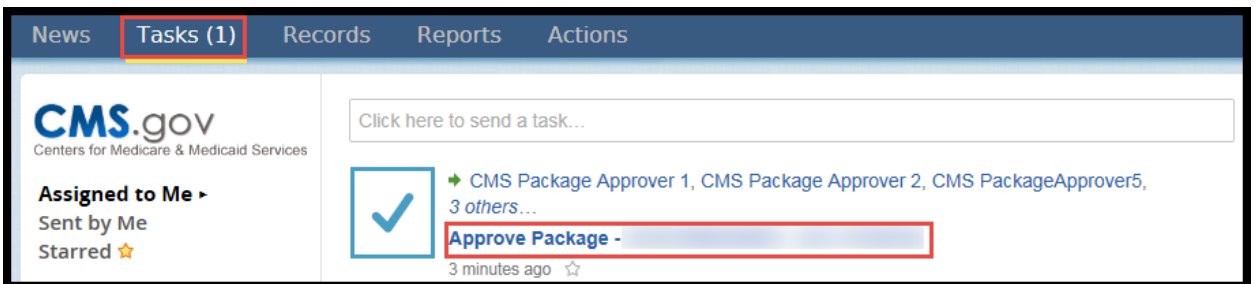
3. If the task was not previously accepted, you must first accept the task by selecting "Accept."

You must accept this task before completing it   Accept   Go Back
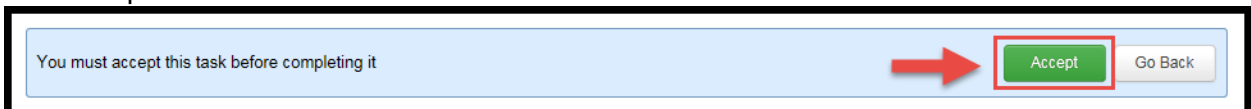
4. Scroll to the bottom of the page and select "Request a Meeting."
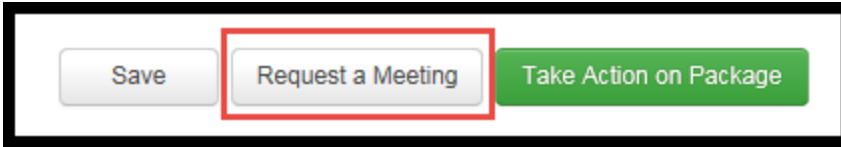
5. Select "Yes."
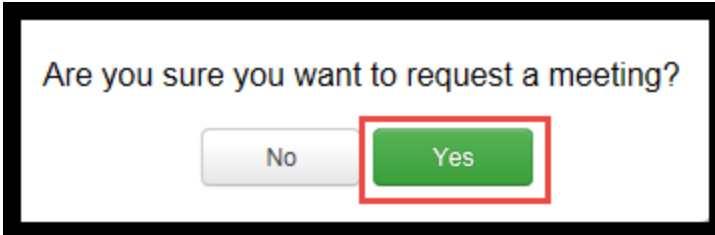
CMS Point of Contact Conducts a Brief Meeting

1. If another CMS User requests a meeting, the CMS Point of Contact will receive a Task in his/her Tasks list to Conduct a Brief Meeting. The CMS Point of Contact will log in, navigate to his/her Tasks tab on the upper tool bar, and select the task labeled "Conduct a Brief Meeting."
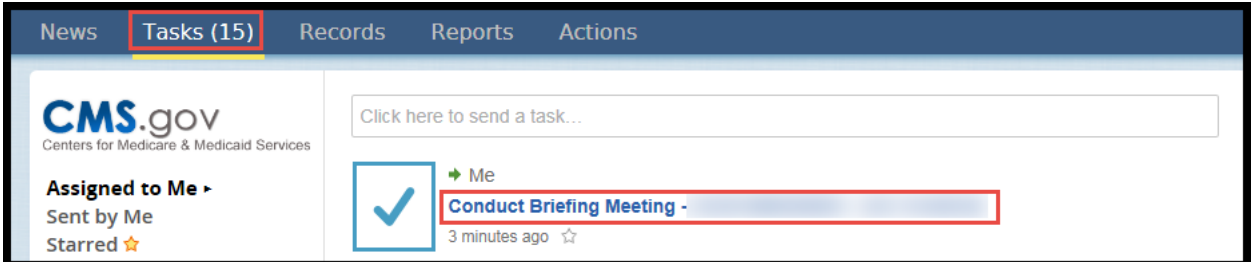
2. The CMS Point of Contact will have one option under Available Workflow Actions—to Modify Approval Letter after Briefing Meeting was conducted. Select the radio button next to this action.
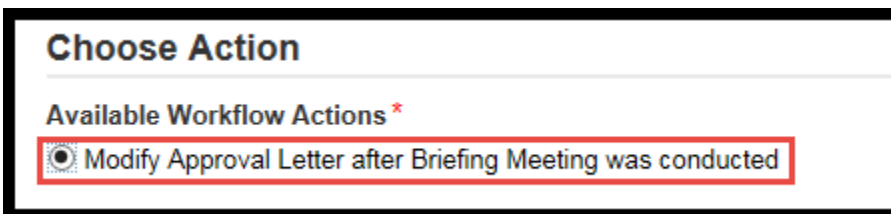
3. There is an optional text box for the CMS Point of Contact to enter Instructions.

Instructions

Test Instructions.

4. Select "Execute Action."

Execute Action

5. Select "Yes."

Are you sure you want to Modify Approval Letter after Briefing Meeting was conducted?

No   Yes
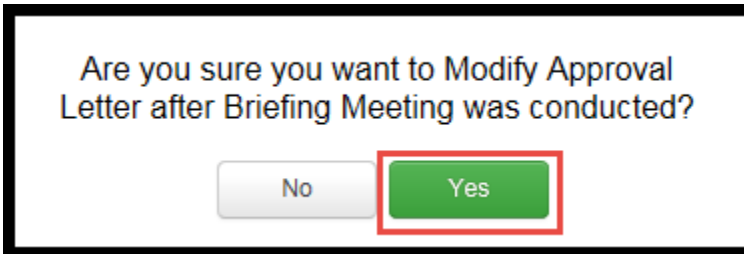
6. This will bring you back to the Tasks tab. After refreshing the Tasks list, a new task will appear to Complete Approval Package. The CMS Point of Contact will select this task, update the approval notice (as detailed earlier in Step 3: CMS Point of Contact-Recommends Approval Disposition and Drafts Approval Notice), and select Senior Manager(s) (as detailed earlier in Step 4: CMS Point of Contact- Selects Senior Managers for Review).

News | Tasks (15) | Records | Reports | Actions

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Assigned to Me ►
Sent by Me
Starred ☆

Click here to send a task…

→ Me
Complete Approval Package -
A moment ago ☆
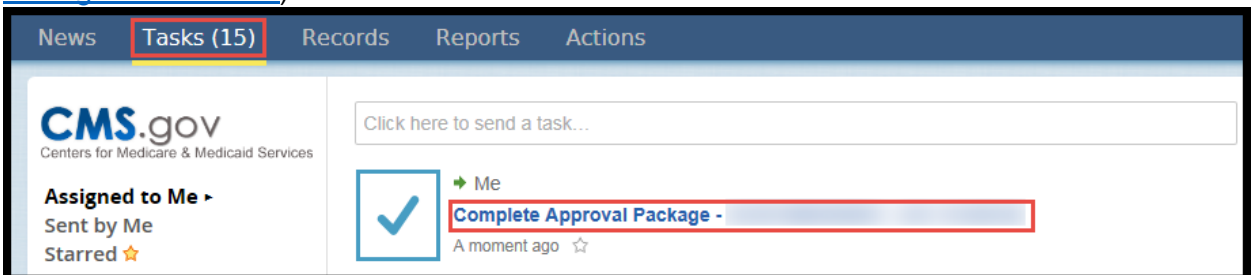
Reports

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

News | Tasks (13) | Records | Reports | Actions
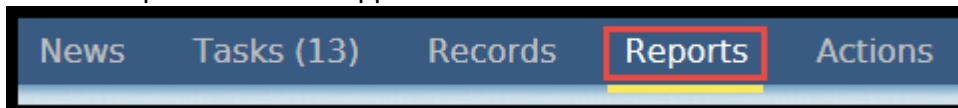
2. Your access to reports will depend on your role. Select the report that you wish to view. A brief description of the report will display beneath the link.

3. Determine your Filter Criteria. The Filter Criteria will vary by report.

4. The data for the report will be shown below the Filter Criteria. You may export the report data by selecting "Export to Excel."

State	Program	Package ID	SPA ID	Clock Start Date	Submit Date	Cycle	Elapsed Days
	Medicaid			1/22/2016	1/22/2016	Review 1	67
	Medicaid			1/22/2016	1/22/2016	Review 1	67
	Medicaid			12/9/2015	12/9/2015	Review 2	111

5. You will receive a message indicating that the export has been initiated and that you will receive a task with a link to download your report.

Export Initiated. You will shortly recieve a task with a link to download your report.

6. Navigate to the Tasks tab and choose the task to Download the Link for your report.
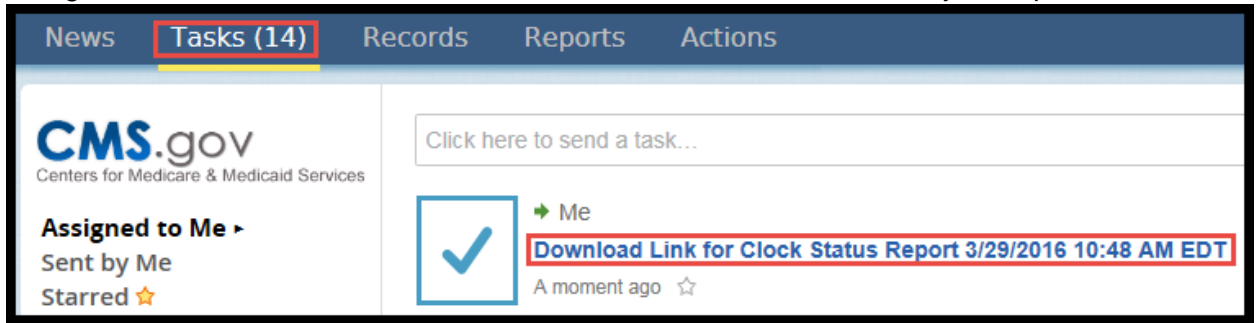
7. Select the link to download your report.

Link for Generated Excel Report

Use the link below to download your report

Clock Status Report 3/29/2016
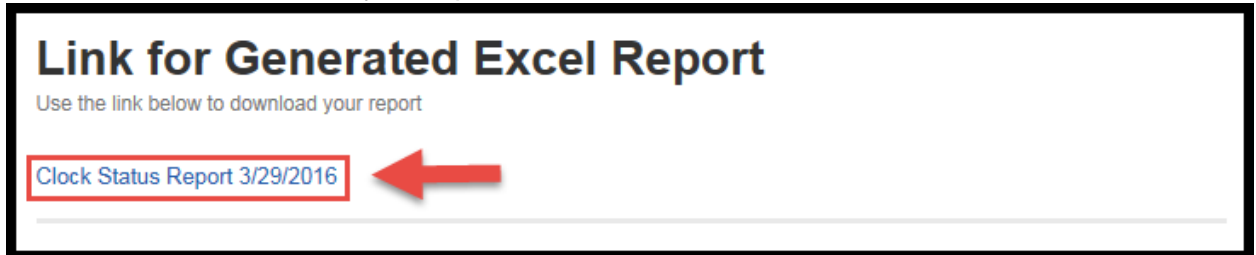
8. You may open or save your report by utilizing the prompts.

Do you want to open or save **Clock Status Report 3_29_2016.xlsx** (14.7 KB) from _____?   Open   Save ▼   Cancel
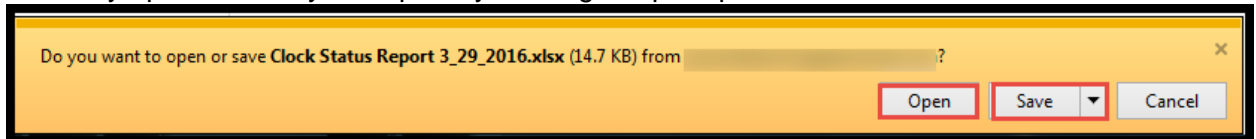
9. Once you are done accessing the report, you will select "Close" to remove the task from your Task list.

Link for Generated Excel Report

Use the link below to download your report

Clock Status Report 3/29/2016

Close
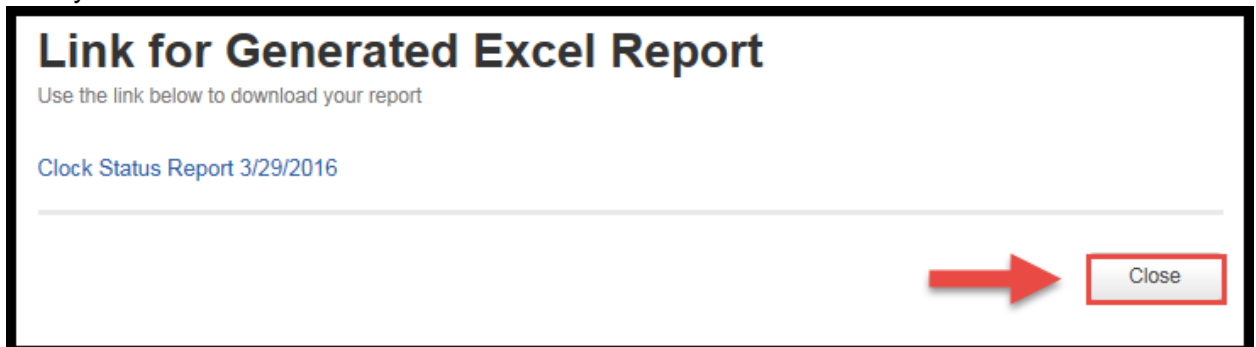
Allow CMS View

1. The State has the option to allow CMS to view the information in a submission package prior to submission informally by using the "Allow CMS to View" functionality. The CMS Point of Contact, Submission Review Team, and Subject Matter Expert[1] have the ability to view these submission packages once the state has initiated the function. You will receive an email notification indicating that the State has allowed CMS to view a submission package.

2. Navigate to the Records tab on the upper toolbar.
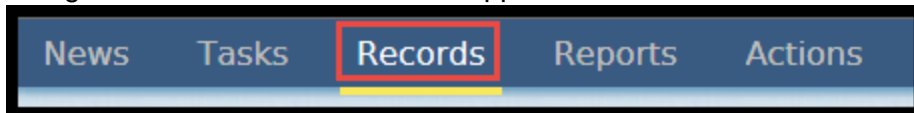
3. Select "Submission Packages-View Submission Packages for your associated state that the State has indicated can be viewed by CMS."
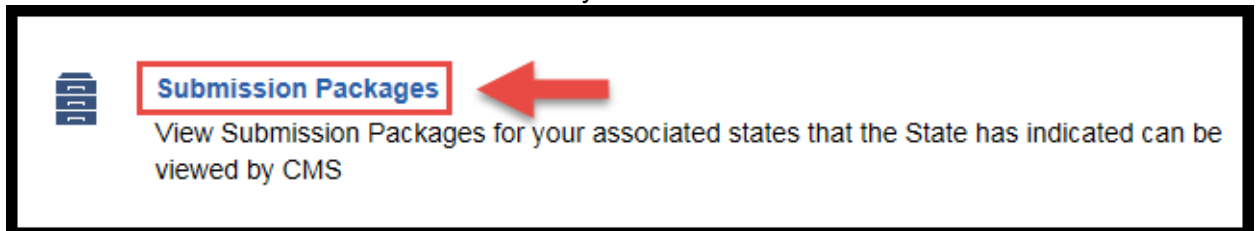
4. Select the link to the submission package.

---
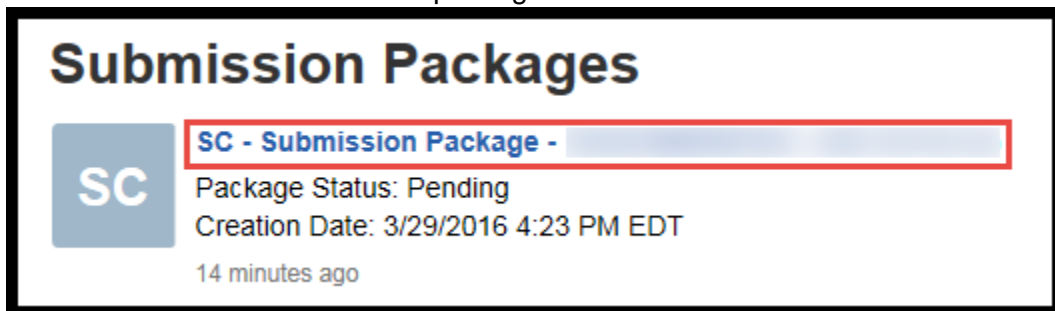
[1] The Subject Matter Expert role will be available in a future release.

5. Then, select "Reviewable Units" from the left-hand toolbar.
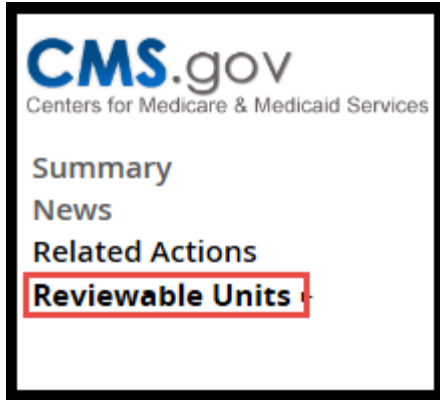
6. You may then select the blue links to each Reviewable Unit to view the data entered by the state.

Submission Form - Reviewable Units

Reviewable Unit	Updated By	Updated Date	Status
Submission - Summary	State Editor 1 SC	3/29/2016 4:23 PM EDT	🕐
Submission - Medicaid State Plan	State Editor 1 SC	3/29/2016 4:25 PM EDT	✅
Submission - Public Comment	State Editor 1 SC	3/29/2016 4:25 PM EDT	✅
Submission - Tribal Input	State Editor 1 SC	3/29/2016 4:25 PM EDT	✅
Submission - SAMHSA Consultation	State Editor 1 SC	3/29/2016 4:26 PM EDT	✅

Printing a Submission Package

1. Select "Records" from the upper toolbar.

2. Select "Submission Packages" for your State.

Records

▣ **Adult Quality Measures**
View Adult Quality Measure Reports for your state

▣ **CHIPRA Quality Measures**
View CHIPRA Quality Measure Reports for your state

▣ **Health Homes Quality Measures**
View Health Homes Quality Measure Reports for your state

▣ **Medicaid State Plan**
View each state's Medicaid State Plan

▣ **State Profiles**
View the State Profile for your state

▣ **Submission Packages**
View all Submission Packages for your State

▣ **Submission Packages**
View Submission Packages for other States

▣ **Users**
Directory of users

3. Select the appropriate submission package.

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

5. Click on a Reviewable Unit link.

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.
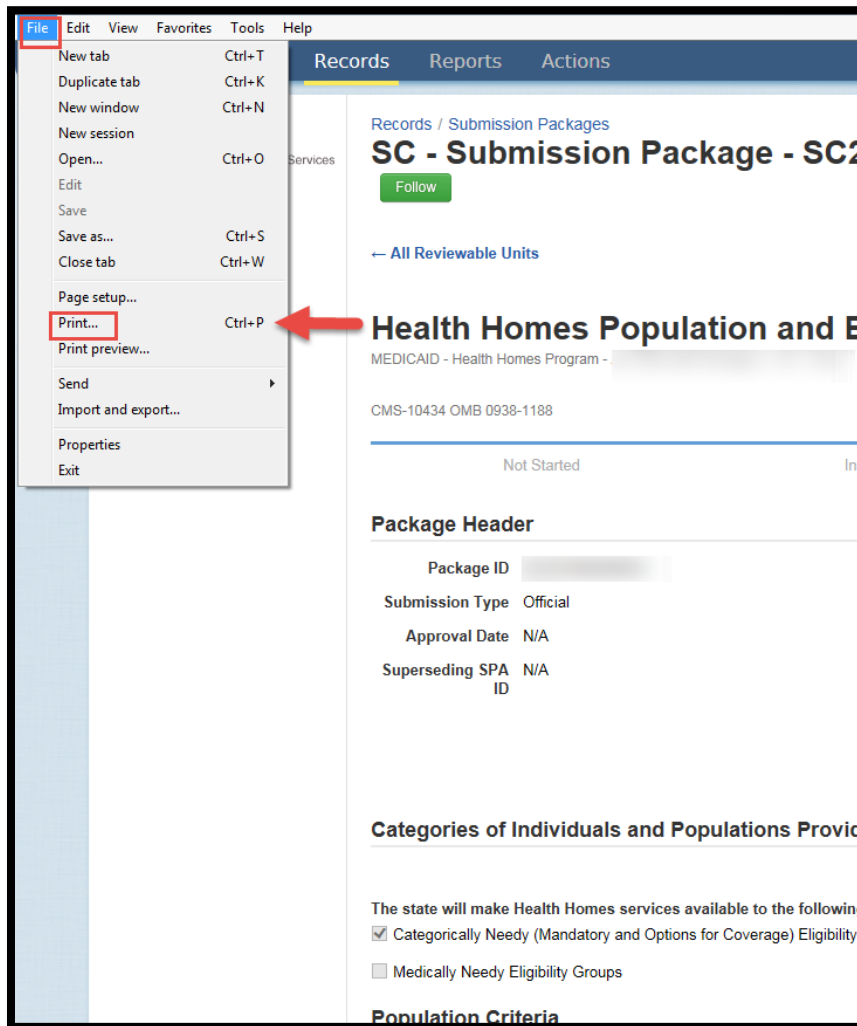
Experiencing Concurrent Sessions Error

1. A concurrent session error should appear as this:

2. The maximum allowed concurrent sessions is one session. In order to avoid this error, anytime you are logged in to MACPro, make sure to log out and not just close the browser. Just closing the browser does not automatically log you out. Logging out is selecting your name in the top right corner and then selecting "Sign Out".
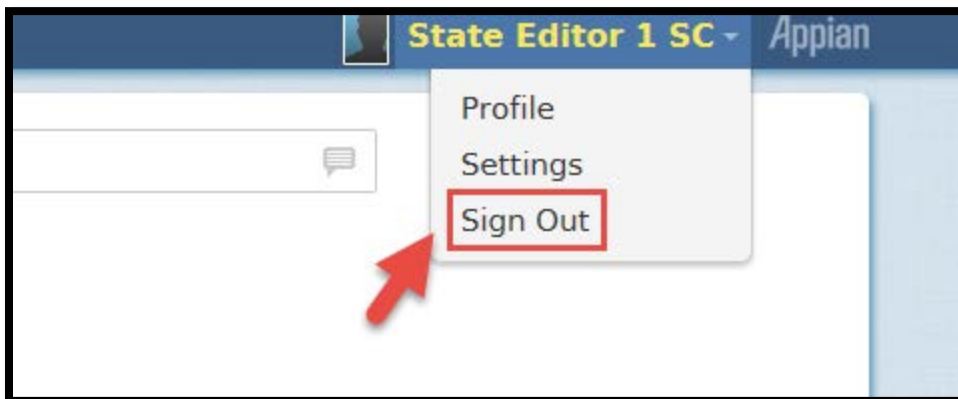
3. Closing the browser is selecting the red "X" in the top right corner of your screen. Do not select this red "X" before logging out of MACPro.
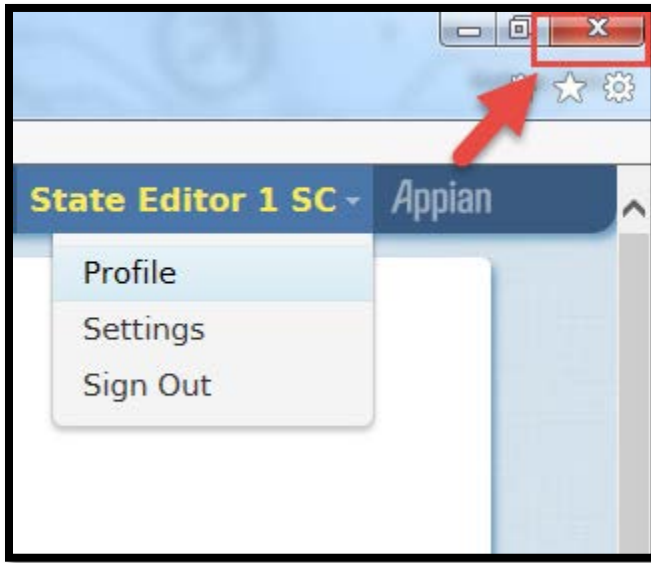
Browser information for MACPro

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.

Conversion from MMDL to MACPro

More detailed guidance is forthcoming for conversion from MMDL to MACPro, see below for an overview.

1. The data in MMDL from approved Health Home SPAs will be copied into the MACPro Health Homes template, for states to use as the basis for future amendments.
   a. Except where the MMDL and MACPro templates differ, states will find the MACPro screens prepopulated with the currently approved information.
2. The official and complete copy of all Health Home SPAs approved in MMDL may be viewed in MACPro as PDFs.
3. Health Home SPAs currently being processed in MMDL will be completed in MMDL.
4. Once the MACPro Health Homes application is operational, CMS will announce a date by which the last submissions can be made in MMDL.
5. When subsequent SPAs are submitted and approved in MACPro, they become the official record of the Health Home program.