Final Transcript

Paperwork Reduction Act for Medicaid and CHIP Program

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SPEAKERS

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PRESENTATION

Moderator: Welcome to the Paperwork Reduction Act for Medicaid & CHIP Programs, Systems MACPro. At this time, all participants are in a listen-only mode. As a reminder, this conference is being recorded. I would now like to turn the conference over to our host, Darlene Anderson.

D. Anderson: Thank you. Hi, everyone, and welcome, and on behalf of CMS thank you for joining us today. This demonstration is scheduled to last for two hours but we've been typically finishing up within an hour and a half, so we don't expect the entire two hours to be taken for the presentation.

What we're going to do today is we're going to do a public demonstration of our MACPro system, which is the Medicaid and CHIP program to meet compliance requirements for the Paperwork Reduction Act. What we hope to do with this demonstration is give you a window in to the system that allows you to evaluate its use for states.

We want to show you the system in a way that will allow you to provide us comments. Generally, as you all know, we publish things in the Federal Register on a regular basis and have a way for the public to provide comments. However, it's really difficult to show you the data collection instruments when we're talking about an electronic system because the instrument would require the evaluation of hundreds of pages of templates. It's very difficult to evaluate their functionality or how it would look on a screen, so what we're going to do today is try to show you through a new mechanism, which is a Webinar, what it would look like on a screen and allow you to comment for PRA compliance.

What I would like to do is take a few minutes to tell you about the MACPro system, give you some background, and then, I'll turn it over to our developer team at Truman Health Analytics. The team with be both Randy Lum and Marjorie Hatzmann who will walk you through the demonstration of the system.

Please keep in mind that these are mid-development demonstrations so they will show what's only been developed to date. Once Marjorie and Randy have completed their demo, I'll come back and give some close out information on how to comment.

The purpose of this PRA presentation is to give you a public view of the new information system to adjudicate SPAs and waivers and make them accessible for your comments. We will be going through a process which is no different from a usual 60 day comment period where we will have this available for comments for 60 days. We will evaluate the comments that we receive in response to these demonstrations, and then, we will be making changes based upon those comments. Finally, we will go out for a 30 day comment period. This procedure is pretty standard for those of you who have been part of a PRA process previously.

What is MACPro? MACPro, the Medicaid and CHIP Program System is our new system that we are developing. If you have worked with us in the past you know that doing business between the state and the federal government generally has involved submitting paper documents to us. That paper process represents either an amendment to the Medicaid or CHIP State Plan or an application for a demonstration or an application for a waiver.

These submissions are generally emailed in to CMS, and we put them through a very manual workflow process here where they're moved from desk-to-desk through an approval process. This process isn't the most efficient for anyone, and we're in the process of transferring all of that to an electronic system which has a new workflow for the Medicaid and CHIP business.

We won't be doing the paper document process anymore so states who want to make applications to us to change their Medicaid and CHIP Programs in any way will do so through the system. What they'll do is they'll look up the authority they want to change. They will make the changes to the templates that are pre-programmed in the system. They'll submit it and get back information that will give them much greater transparency in to where their submission resides, what the clock days are, what the status of it is, and much more transparent environment that currently exists.

Additionally, the MACPro System contains newly designed applications for the Medicaid and CHIP programs so they won't look exactly like state plan preprints as you've seen in the past.

The diagram you see on the screen right now is a diagram that represents the concept of MACPro. Essentially, it's the stakeholders around the outer circle who are submitting information to and from the Medicaid and CHIP programs. The arrows you see at the bottom of the diagram that are going out and not in represent the MACPro system that will feed a lot of public information out also. Healthcare.gov will use MACPro data. Medicaid.gov, the new Medicaid website, will have a lot of MACPro data displayed on it resulting in there being greater transparency right from a single source of truth about the Medicaid and CHIP program. That's the concept diagram.

Why MACPro? MACPro's a system designed to be a single means of collecting and retaining information on State Medicaid and CHIP program characteristics and to adjudicate program changes. Some of you may be familiar with our Waiver Management System as it's the only electronic system to do this that we have ever had. That was our smaller scale project that we are now extending to cover all authorities so that it will have a single system to refer to when you need to find out what the status of the program changes are and what programs look like in each and every state.

At this point, I'm going to turn this over to have a walkthrough of our MACPro system, and to do that I will introduce Marjorie Hatzmann who will be speaking through most of the demonstration to you and is a project manager for the development team from Truman Health Analytics. Marge?

M. Hatzmann: Thanks, Darlene. This is Marge Hatzmann from Truman Health Analytics and the other voice that you may hear during the demo is Randy Lum. What you are looking at is actually the desktop of Randy Lum's computer, and he's actually going to be controlling the demo today. I know some of you would be very tempted during the Webinar to click on some of the buttons that you see on the screen. Well, you will not be able to do that. Randy is actually in control of what you're going to see.

A couple things that I want to say up front in terms of the background about MACPro. The first thing, and this is really very important, is what you're going to see today is a demonstration of a system that is currently under development. You are seeing real-time screens. Everything you see is being worked on. Everything is still in process. The system is not yet complete.

The other thing that's very important is that none of the data that you will see on any of the screens today is real. We are going to be showing you an example of some State Plan Eligibility data. We happen to be working in our test environment and you will see a lot of things that say, "California." This is not California's data. This is just an example for purposes of the demo.

The goal of our demo today is to give you an idea of the look and feel of the MACPro system, and also to show you some of its functions and features.

With that in mind, we're going to go ahead and open up Medicaid State Plan Eligibility. Let's talk a little bit about how users will login to the system and what types of users will have access to the system and the different types of access that they will have. There are a number of categories of users for the MACPro system, and the categories include state users and within state users there are a couple of different roles. Some of them are read-only roles where you can just view information; other roles allow you to create a submission and edit a submission; and then, there is a state Medicaid director role that is able to actually officially submit a package of information to CMS.

In addition to state users, there are also CMS user roles. There are separate roles for analysts in the CMS regional offices and in the central office, and there are also special roles for regional office directors, administrators, and CMS directors and administrators.

The role within the system determines what functions you have access to and based on that role you will see on the screen certain functions that are available to you. To make that more clear I'll give you an example. We went ahead and opened up one of the submissions, and when we do that the first thing you're going to see is this information page.

The information page provides you with some basic information about the submission. Up at the top of the page you're going to see a draft ID for this particular submission. The draft ID is simply a number that the system uses to track the submission, so sort of like when you're buying an airline ticket on line you have some sort of confirmation number that's issued to you. That's pretty much what the draft ID is, and it allows you to look up the submission at any time within the system using the draft ID.

Other basic information that you're getting at the top of the screen includes a title for the document, and the title for the document is actually determined by the state user who creates the document. The title is generally something descriptive that will allow the user to find this document within the system. We were not all that creative in our example, and we just called it CASPE.

We have some information also around the type of request, and in this case the request is new, and currently this particular submission is in draft status, and we'll talk a little bit more about that later. What I would tell you about the user role—I indicated that for certain roles certain functions are available, and you can see part of that here on the page.

If Randy pages down just a little bit you can see that there are certain functions here that are underlined. Those are functions that are currently available to Randy based on the user ID he used to login, and Randy actually has logged into the system for the demo as a state Medicaid director in the state of California. Now, keep in mind we are only in our test environment and Randy cannot actually officially submit anything as the state Medicaid director in California.

What you're seeing here are the functions that are available to the state Medicaid director role for this particular submission. Randy can browse this document. He can edit. He can print. He can run the validate function, which I'll talk about a little bit later. He can run change report, change logs. He can take a look at the transaction history, and he can actually go ahead and submit this once it is completed. We're going to circle back and look at a couple of these functions after we've had a chance to take a quick look at the system.

The draft submission is actually available to state users and it can be edited when it is in draft form. Once Randy makes the decision to submit this particular submission the submission would then be locked and no more editing can take place unless it is re-opened again for other purposes; if something needs to be modified or changed, but it becomes locked.

As I mentioned, in draft form this can only be viewed by employees in the state of California. If you are working on a submission and you are a state analyst and you're working with analysts at CMS and you want them to look at or provide some feedback on part of your draft application but you're not quite ready to submit it there is a feature here that allows you to do that. The feature is called "Allow CMS View." If you click on that CMS analysts can then see the draft, and then, if you want to hide the draft again you would just click again where it says, "Hide from CMS" and the draft would again only be available to state users. Now, keep in mind that this is a toggle switch. You can turn it on and off anytime you want.

The other thing that's important to note is Randy's ID is that of the state Medicaid director for California. In that role Randy cannot edit or create documents for the state of Montana or any other state, only for California. He is limited to working in submission only for California.

You'll notice also that there are a couple of functions that look like they're grayed out and they're not underlined, which means they cannot currently be accessed. There is a comment feature that CMS analysts use when they're conducting your review that is available to CMS users only. The other function that's grayed out is something called "Create Amendment." Now, the amendment process (I'll describe it a little bit later on during our Webinar) can only be conducted on something that has already been submitted and approved. If the submission is still in draft you cannot create an amendment at that time. You can only create the amendment later after the review process has taken place and something has been approved.

I think the functions will become a little bit clearer after we have gone ahead and taken a look at some of the pages within the submission. Then we'll circle back, and we'll look at the functions again towards the end of the Webinar and give you a little more detail around each one.

Right now I'm going to ask Randy to go ahead and open this up in edit mode so we can take a look at the submission itself. Now, again, we are working in Medicaid State Plan Eligibility. You are seeing screens that are under development, and none of the data that you're going to see is real.

We initially have just a cover page here so we'll go on past that, and we'll go over to the next screen. I'm going to use this screen to show you how the system functions and how you navigate around. There are two main ways to navigate within the system. The first one is, at the bottom of the page there is a continue and a back button. The back arrow will take you to the screen that you were just on, and the continue arrow takes you to the very next screen. We'll talk a little bit more about the check function later on that's located in the middle.

The continue and the back buttons can be used for navigation. The other way to navigate within the system is to use the menu on the left-hand side. What you see in the menu are major sections for Medicaid State Plan Eligibility, and when you click on a particular section to select it you will see any subsections that are listed under it. In this case we're looking at ABD Eligibility Process, and there is one sub-screen under that that's showing up in the menu. Later on in some of the other sections you'll see that there are a number of subsections that are filed under a particular section.

If, for example, I am working on this today and I work my way through ABD Eligibility Process and maybe I'm also working on income and resource standards and then I have to go for the day, I go ahead and save my work. When I login tomorrow I can pick up where I left off by using the left-hand menu. I would go and I would click on the next section, which would be income resources methods and I go directly there.

The other thing that's important to know about the system and this is consistent throughout the system regardless of which application you're looking at, there is a yellow navigation bar that's a banner that's up at the top, and it has some functions in it. There is a home function which takes you back to the home screen. There is a logout function which will log you out of the system and save your data. There is a finder. In case we made the wrong selection and this wasn't really the submission that we wanted to look at we could go back to the finder and make a different selection.

There is a manual save feature which can be used at any time and we recommend it highly, particularly for anybody's that working on a wireless connection. You don't want your connection to go down and you don't want to lose any data that you keyed in so we recommend that you save fairly frequently. In addition, the system has a security feature that will log you out after 30 minutes of inactivity. You definitely want to hit the save button if you have to take a phone call while you're working on this or you go to a meeting and you leave it open; save it first.

There are also a couple of features that assist the user. One of them is called "Validate" and the other one is the "Check" feature that was down at the bottom of the page. I'll actually talk about the Check feature first.

The Check feature allows you to make sure that you have filled out all the required fills in a section. When you think you've gotten to the end of a section you go ahead and run the Check feature, and it will identify any required fields that you might have missed, and you can go ahead and make sure that those are complete before moving on.

The Check feature is actually a subset of the Validate feature, and the Validate feature, which is up in the yellow banner at the top of the page, will actually check the entire submission from the beginning to the end and identify any required fields that were missed or anything that was inconsistent. If it was a date field and there isn't a valid date, if it was a numeric field and text was keyed in, those types of errors will pop up.

When a user is finished filling out a submission it's a good idea to run the Validate feature to make sure that everything is complete, and you can actually print out the report that it produces and check to make sure that you've filled in anything that's missing.

The application has a number of sections as you saw when we showed you the menu. The Validate feature is fairly important because it is easy when you're filling something out of this magnitude that you might miss a field here and there. You want to make sure that you correct those before you attempt to submit the application. Once you actually submit if you do not pass the validation check the system will not accept that particular submission until those errors are corrected.

In the short-run this seems like it might be more labor intensive but in the long-run it's actually less labor intensive because it cuts down a lot on the back and forth between your state and CMS. If the application that's being submitted is complete no one has to go back and forth looking for missing information, and that should save a lot of time and speed the review process for this particular application.

There is also a print feature. What the print feature does is it opens up a new window and creates a version of the submission that fits within the margins of a printer, and then, you're able to print it like any other document.

There is online help. The online help in the system will be a combination of tips on how to use the system and also information on how to actually fill out the Medicaid State Plan Eligibility submission. It is a combination of technical information about the system itself and information about the content. The Help feature is actually keyed to the screen that you are on so when you are working in the application if you hit Help it will show you information for the screen you're working on. However, you can scroll around within the help and look at anything that you want.

Within the Help there will also be the availability of the technical guide for Medicaid State Plan Eligibility, and that is a very comprehensive document that tells you what needs to be submitted and provides a tremendous amount of detail. You will be able to download a copy of that in PDF form from the help file in case you need to use it, and you can do that without logging out of the system.

A couple other things that you can do while still remaining in the system; if we go down to the bottom of the page there are a couple of features down here that I'd like to show you. Available to you will be frequently asked questions about the system to supplement the help file. There's a site map. There's a contact where you can ask for some assistance regarding the system, and you can also link over to either Medicaid.gov or CMS.gov and see that.

We're actually going to, at this point, walk through a small example of Medicaid State Plan Eligibility and how it is entered in the system. I think that this will help you understand better how the system works and how you will be able to use it.

We are working in ABD so the first question that we're answering is we're selecting an option which describes how eligibility is determined for ages, blind and disabled individuals in this state. For purposes of our example we picked 209(b) indicating that the state uses more restrictive requirements than SSI to determine eligibility for Medicaid for ages, blind and disabled individuals.

Now, the way the system works is once we have made that selection the system will actually help us supply all the information we need to describe the eligibility administrative process and related details. The system works a little bit like tax preparation software. If you've ever used something like Turbo Tax, initially you're answering a number of questions in the software, and then, the software helps you out by showing you which forms you need to fill out.

Well, MACPro works in a similar way and we tried to set it up in a way to make it user friendly. For the user once you've made the determination that what you want to fill out is related to 209(b) the system will help by guiding you through which forms are now required. Once we hit the continue button we'll be able to move on within the system and supply some more information around 209(b).

We're going to hit the continue button and once we do that we're being asked to supply some information around the more restrictive requirements, applicable categories, and income. Within the system the first thing we do is we indicate which category the requirements apply. In this case we have selected ages, blind and disabled, and then, we go ahead and supply some more information around the restrictive requirements that are in place.

We go ahead and make a selection and the way the system works is if we select the outer most check box we can then fill in the detail underneath it, but if we do not select that check box, so if that question does not apply we do not need to fill out the detail underneath it and actually the system prevents us from wasting our time and doesn't let us do that.

In this case, we've gone ahead and indicated for question number two we have more restrictive income disregards or exclusions, and then, we checked under B, VA benefits. And then, after that we can supply some more detail around the VA benefits; aid and attendant, unusual medical expenses, and any other applicable categories. But if we had not selected VA benefits not only do we not have to supply this information we would not be able to do so because the system would not let us check those boxes.

There are a couple of ways that the system collects data and it is consistent across all of the applications, and we'll actually use this page to show you some of those. As you can see, there are check boxes in the system. There are also some text fields. Under the first category we went ahead and added some information about the income disregard or exclusion. We gave it a name, and then, we supplied a description.

Now, when there is a text box that holds a substantial number of characters like this one for the description, the system actually provides a character counter to allow you to determine how much space you have left in the box. As you're typing (You can see Randy's doing it now) the character count goes up so you know you've used 179 characters out of the 500 that are available. It gives you a clue as to whether you need to start abbreviating what you're putting in or if you have plenty of space. That is the case for all the large text boxes within the system.

The system also allows for collections of information, and here is a good example of a collection. In this case, we have keyed in, for example, one income disregard or exclusion under aid and attendance. Now, if there are two we can add another one, and once we're adding this collection of information we have to fill out some specific details around that information that we're adding. We then get another text box for name, you know, what do we want to call this income disregard and what's the description of it.

It's important to note a couple of things about these collections of information. As long as the application is in draft form these collections of information can be edited at any time. They can also be deleted. If you key something in and it really didn't make sense to you it's pretty easy to delete it. You would click on the delete key. The system actually gives you a quick warning and asks you to confirm that you really want to delete this. Just a little check in case you hit that button by mistake, and you can either delete it or cancel it at that point.

While this is in draft form you can edit these. You can delete and you can add, and the system actually does not provide limits for you on these collections of information. If you actually had 20 disregards or exclusions that you wanted to add here the system would allow you to do that. There is plenty of space and it will just go ahead and accept them and you can just keep adding them in. Now, you can see Randy deleted the one that he added so now there's only one showing on the screen.

As I mentioned, we have check boxes. We have some text boxes. We have collections of information, and in certain parts of the system there are also radio buttons, which are mutually exclusive so you can only check one of the choices, and there are some dropdown boxes as well.

Another way the system helps orient you a little bit are up at the top of this page there is a title for the section that you're working on, and there's also some direction on how many pages are in this section and what page you are on. In this case, we're on page 203 and the section that we're in is dealing with more restrictive requirements than SSI. We're going to continue to fill this out, and Randy is showing you over on the left where you can see on the menu also where you are. It shows you the section that you're in and the subsection that you're on. Those are some things that will help orient you when you're working within the system.

In this case, we've already supplied some information around more restrictive requirements, and then, we've got a few more questions to answer around the resource standards, household size, and then, we're going to page down a little bit and talk about how real property is being treated and personal property. As you can see, again we have some check boxes. There are some collections of information. The system is consistent in how it's collecting data so once you've filled out a few screens you will get used to the method and it will be much easier for you because it is consistent from screen to screen.

Then, on this last page we have a few more questions around restrictive requirements. Again, if we make a selection then we can fill in further detail underneath that selection, but if we don't make a selection we're not able to do that; the system will prevent us from doing so.

Once we fill this out, now we're on Page 3 of 3 and say we're done with this particular section and we don't have anything else we want to add around more restrictive requirement, we'll then hit the continue arrow and we'll move on. We're actually going to skip over this particular screen because it's not relevant to our example.

We've gone ahead and identified that we were a 209(b) state, and we identified more restrictive methodologies that we were using, and now we need to provide some information around how spend down is handled. In this case, you can see that we have—here are some radio buttons. If we have one budget period we make a selection under that, and we can only pick one of those, and either we have one budget period or more than one budget period but we can't have both. The system will actually prevent us from erroneously checking both of those. In this case, for our example, we have more than one budget period (it's a complicated example) and we have a community budget period, and an institutional budget period and they are not the same. We've supplied some detail around those two.

Now, we also have another category and the other category will be a collection of information, and it works in a way that is similar to what we showed you with the restrictive methodologies where we were adding information. We can edit it and delete it, and as we add it will appear on the page in the table.

A little further down the page we have some more questions about incurred expenses and unused expenses, and one of the things that I wanted to show you here is we also have a little warning. In the system we try to give you some clues around some things that you might need to know, and here we wanted you to know that if you are a 209(b) state you have to make this particular selection. We've just given you that warning so that you're not confused when you get to this point, and you know that you need to check that particular box.

A little further down the page you will see the opposite type of warning. In this case we're telling you that if you are a 209(b) state you cannot make this selection; so just some clues to help the user when working through the system. In addition to what's in the help file, in certain spots in the system there are instructions on the screen and there are some of these warning messages.

Then, down at the bottom the last question we're answering is around spend down payments made to the individual, and if they are what the pay-in option is and on what basis. We're going to follow our example through and then, we'll actually go back and look at some more functions in the system to make sure it shows you how the system operates.

Once we've supplied that information, and if you look at the left-hand menu we actually— just to give you some of your bearings, we started on the submission page. Then we went to ABD Eligibility process. That was where we indicated we were a 209(b) state, and we dropped down to income resources standards and we supplied a bunch of detail around that and income resource methods, and now we are in mandatory ABD because, as I mentioned when we started the example, our example is for ages, blind, and disabled individuals. That's what we're focusing on for purposes of this demo.

Once we've supplied all the information around the income resource standard and methods, we're going to go ahead and supply some information around mandatory coverage. In this case, we are indicating how ages, blind, and disabled individuals are being covered, and this is really just a confirmation that this eligibility group has the following provision. The state's confirming this is what we're doing, and we are answering some questions around less restrictive methodologies. Again, here's like a collection of information and this one actually has some detail behind it so we're going to go ahead and click on that and show you the details.

Here we have some information that is specifically tied to the less restrictive income methodology that we are describing here and we've given that a title for the methodology, and then, we're supplying some detail around it. As you can see, up at the top of the page we actually have six screens of detail associated with this methodology and we are on screen 1 of 6 so that helps us to get our bearings to know how much information we need to provide here.

We're answering some questions around whether or not an income test is used, and then, we're going to go ahead and supply some information around treatment of changes in income of the eligibility group. In this case, we answered that we have a methodology that fits in the other category so the software is asking us, "Okay. You've got to go ahead and describe that. What's the name? What's the description?" Again, here we have another one of those text boxes with a counter.

I wanted to point out that for these text boxes if you have this text somewhere else in a Word document or in an email that's in plain text you can actually copy and paste it right in to the box, and Randy is actually going to show you that. He'll copy and paste one of the questions in to the box so you can see how that works. You can see that he copied and pasted the text, and then, also the character count went up to reflect the additional characters in the box.

If we had another methodology we would click the add button and, as we showed you before, it will give us a new box where we can supply another name and description.

Once we're done filling out this page, we would go ahead and hit continue and we are continuing within those six pages where we are providing detail around this particular income methodology. The system gives us back the title that we gave it up at the top of the page so we always know that the information we're supplying is related to what's in that title.
This page is asking some questions around the federal poverty level and how it's being used, and income standard information, and limits. Again, there are some mutually exclusive choices here and that's what the circles represent. There are some text boxes. In this case, some information on percentages that we can supply and we can also supply some names in some of the text boxes if necessary.

Continuing through our example we're on Page 3 of 6 and we're continuing to answer questions about this particular income methodology. We have some large description boxes here, and as we continue on clearly we can supply quite a bit of detail around this methodology, and we have a number of screens that we're filling out. But just to give you your bearings and not spend so much time on the detail, once we've gotten to the end of this and we've filled out 6 of 6 or if we want to stop after we've filled out 5 of 6, up at the top of the page we can go ahead and click on the link and go back to the eligibility group.

If you see where it says, "Return to Eligibility Group," it's right under where it says, "Page 5 of 6," we can click on that and we can go back. When we go back to the summary page, and this is the page we were looking at earlier where we indicated that we had a less restrictive income methodology that we wanted to include and supply some detail for, you can see that's listed here. If we want to go back to the detail we hit edit and it will open the detail pages, and we can, at any time, return back here to the summary page by clicking where it say, "Return to Eligibility Group."

Now, if we didn't have anything to report under less restrictive income methodologies, under Question B we would not have to fill out those six detail pages. They would not be relevant, and we wouldn't be able to fill them out unless we check the box and we add in a methodology that we want to cover.

At this point we're going to continue on, and then, we're going to go back and look at some of the specific functions. Actually, this page is around Cobra, and that's not part of our example so we'll move ahead.

If you look on the left-hand side, again, at menu, we've been working through a number of the screens over here, and we are back at income resource methods, and we're supplying some details here. We talked about this earlier so I'm going to go back and just wrap up our example, and then, we'll take a look at some of the other system functions.

As part of our example, just to remind you, we were logging in as a state. We wanted to supply some information for eligibility for ages, blind, and disabled individuals. We indicated that we were a 209(b) state, and then, the system assisted us by supplying the screens that we needed to fill out to indicate more detail that was associated with 209(b) including ABD eligibility process information, income and resource methods, and spend down information.

Returning back to what we call our control panel for this particular submission, let's talk about a couple of the other functions within the system, and why you might want to know about them. When we started our call Darlene was talking about how the goals of MACPro included more transparency for the review process, and there are a couple of functions in the system that facilitate that.

The first one that I want to show you is a very simple function called a "Transaction History." This is actually an audit log within the system, and the Transaction History logs all of the important information around this particular submission. You can see here that this submission was created on a particular date, draft status, it tells you who created this particular submission, and one of our colleagues was helping us with this example, Steve …, and he actually created this submission for us in the test version of our system.

Now, if this had also been submitted and it was no longer in draft form you would see another entry and it would say a date and a time that it was submitted and who submitted it. If that was Randy you would see his name appearing here. The Transaction History can be accessed at any time to identify major events in the submission, and where this could be helpful is if you were wondering when a particular draft was created you can take a look in the Transaction History. If you needed to record when you submitted something you could also take a look in the transaction history and it would tell you the date and the time that it was submitted. You can always refer back to that as an audit log.

A couple of other things that are included in the system to assist users, we have a couple of features in the system called the "Change Report" and the "Change log." What these two features do is they compare two submissions. If you went ahead and you submitted this particular State Plan Eligibility document and then it was re-opened because you needed to add some information, you could use the Change Report and the Change Log when you resubmitted to look at the differences between the two submissions. This not only documents for the user what they changed but it also helps the reviewer at CMS identify the changes.

We talked a little bit already about allowing CMS to view a draft, and that can also provide some assistance when needed. Then, down at the bottom of the page there's a little function called "User Access," and we're actually going to click on that so we can show you how that works. Now, keep in mind this is our test system so we loaded a whole bunch of users in here from the Waiver Management System so we would have some test IDs.

Now, remember Randy is logged in as the state of California, and he is logged in as the state Medicaid director. In that role he can go ahead and allow any of his colleagues to access this particular application that he has created and he can give them the right to edit it if he chooses to do so. Otherwise, they will be able to see what he has created but they would not be able to edit it without permission.

In this case Randy has decided that he's going to include Steve … who is working with us, and he's gone ahead and given him access to this particular application. At any time, if you're working on an application you can share that with your colleagues and give them the right to edit what you're doing. If you're working together as part of a team, so maybe you're working on particular sections of eligibility and you want someone else to login and help you with the spend down information, as we showed you before, you can add them as a user to your particular application.

Now, keep in mind if they do have a valid ID for the system they can view what you created. They just cannot edit it unless they've been given permission. In addition, the system is accessed with a valid user ID and a pass code and if someone does not have a user ID and a pass code for the system they will not be able to get in and assist you. You need to make sure that they've been assigned a user ID before you go ahead and decided to share something.

Another point that Darlene made earlier in our Webinar is that one of the purposed of MACPro is to have a single means of collecting and reporting information. How the electronic system assists with that process is that anything that is created in the electronic system is retained. It can be deactivated if it is no longer in use, but it is retained by the system. At any time you can go back and look at a draft that you've created or anything that you have submitted.

Initially, this will be less helpful because the new system won't have historical information, but over time as you enter a number of submission in to the system they will be available for your use. At any point in time you would be able to see for your State Plan what is included. If, for example, I logged into the system and I entered this information in November of 2012, and then, in November of 2013 I login to the system but I don't want to see what's in my state plan as of November 2013. I really want to see what was in my state plan a year ago in 2012. I would be able to use the system to get that information because everything that is entered is collected in the system and retained. I would be able to go back to that point in time and see what provisions where included in my State Plan.

You will have an electronic historical record of your State Plan available to you through the system, and at any time you can login, access any submissions that were previously entered into the system, and print them out or print them to a PDF to have an electronic copy of something. That will be one of the more helpful features of the system.

The other thing about having the information in electronic form is that it will speed up the review process. CMS analysts that are working on a review, you can ensure that they are looking exactly at the same information that you submitted. Any changes that you submit they will have direct access to. All they need to do is login to the system. You won't have to be trading emails back and forth with large documents attached or FedEx anything. Everything will be in electronic form so it will allow for electronic management of the review process and electronic submission.

Some of the features within the system that will assist users; there is a notification feature. Once you have created and submitted a document the system will actually send an email notification back to you confirming that you've submitted the document, but also to the CMS analyst so they know that the document is online and available and they can login to the system and look at it. Any major changes that take place with the submission a notification email will go out around those. If it is re-open for editing or if it has been reviewed and it's been approved you'll get a notification. In your email the system will let you know that has occurred.

Wherever possible the system has been set up to facilitate data entry for the user to try to make things easier, and one of the ways the system does that is through the amendment process. Now, as I mentioned before when the system first goes live you will not have historical information in the system. The first application that you enter in the system will serve as your baseline information, but once you have actually keyed that in and submitted it and it is available within the system and in a proof form, you will be able to create an amendment using the system.

The system really helps you with this process. Any time you have to create an amendment for your State Plan and file it you would select the most recent version of your application, the current approved version. You would hit create amendment. The system will actually flow all the data and it will create the amendment for you preloaded with the existing approved version. All you would have to do within the system is in the amendment identify what has changed. You don't have to key in any information that's already in the system. It's there for your reference so you can look at it, but you only need to indicate the changes. This saves a lot of time and also allows for easier tracking of what has changed within the amendment.

Randy, what I'd like to do is show a couple screens from the 1115 application so we can give everyone a little preview. What we've been showing you so far is State Plan Eligibility, and we're going to show you a couple of screens from the 1115 Demonstration application. The main purpose in doing this is just to show you that the system is going to be consistent across the applications. Once you've learned how to use the system you will have a very low learning curve when moving from one module from another, so once I've learned how to use State Plan Eligibility, 1115 will be very intuitive.

As you can see we are now working in Guam in our test environment, and we have a draft for 1115 Demonstration. Just like State Plan Eligibility it's got a draft ID. It has a title that we created. It gives us the type of request and the current status, which is also in draft, and then, shows us what functions are available to us. Again, underlined functions are available. Anything that is grayed out is currently not available either because of our status within the system related to our user ID or because of the status of the submission. For example, since this is a draft we can't get Create Amendment.

We're going to go ahead and open up this application so you can get a look at it and see how similar it is to State Plan Eligibility. When we're working in 1115 you're going to see that we have some very similar screens in format. The content clearly is different, but we also have—

R. Lum It looks like my development team has been updating things on 1115 so—

M. Hatzmann Okay. I think you should logout there. We'll go back to State Plan Eligibility. In 1115 you would see very similar data collection methods. You're going to see radio buttons. You're going to see check boxes. You will see some text boxes, and just like State Plan Eligibility the text boxes will have character counts. You'll see collections of information where you're able to key in some detail, and the collections work the same way. You can edit them at any time. You can delete them, and you can add an unlimited number for the collections.

Once you've learned how to login to State Plan Eligibility and work on it you won't have any trouble working on 1115 or benchmark or any other features within the system. Wherever possible we've tried to make the screens look as similar as possible and function in the same way to make it easier for you.

Just to go back and emphasize a couple of key points; using MACPro (the electronic system) you will be able to submit to CMS State Plan Eligibility, 1115 Demonstration Applications, and any of the other programs that are included in MACPro electronically over the Web. That means that as long as you have a user ID and a pass code that are valid within the system you can work on them at any time. If you need to work on something from home as long as you have Internet access, a valid password and user ID you can login to the system and go ahead and work on any of the applications that you need to.

You will have an electronic record both of what you submitted and when you submitted it. We showed you the Transaction Log, which records dates and times of major events, and you can reference that at any time. You can also login to the system and see any submission that you created whether it is in draft form or it has been submitted; everything is retained. That will allow you to look back and see what was included in your State Plan on a particular date. It will also allow the CMS reviewers' to access historical information about your State Plan if they need it. You can ensure that both you and the CMS analysts are looking at the same version of your application by referencing the draft ID number within the system.

Wherever possible the system has been designed to save labor for the user, and one of the ways it does that is by cloning information through the amendment process. Once information has been keyed into the system for your state you do not need to key the same information again. You only need to update and modify it and that will save you data entry over time.

You're really only putting in the information once, and then, you're just indicating any changes.

The system allows for some tools to help you with both the submission process and also to help CMS users with the review process. There is a Change Report and a Change Log within the system. There is a way to allow CMS users to view a draft, and there is also a User Access function, which allows you to share editing of the application with some of your colleagues at the state government.

When we were first staring up our Webinar I talked a little bit about the user roles. There are a number of roles and levels within the system and roles can be set up to have specific functions. It is possible that you could have the ability to create and edit State Plan Eligibility drafts but someone else at your state would actually be the person who could create and edit 1115 Demonstration applications. It doesn't have to be the same user. Roles can be set up specific to a module within the system.

There are also read-only roles. If it's a situation where you just want to share what you're submitting and allow someone to review it they can be in the system in browse mode and just look at the application. The system allows you the ability to print any of the applications and you can print them to paper or you can also create a PDF so you have an electronic copy. In addition to that, the system allows for some edit checks. You can run the Check function and the Validate feature to make sure that you have not missed any required fields before the submission process. Those are tools that you can use at any time when you're working on the application.

I think that covers the features of the system and gives you an idea of the look and the feel of the system. Again, the goal of MACPro is to streamline the submission and the review process and to create a single means of collecting the program data for Medicaid State Plan Eligibility, 1115 Demonstration, and other programs, and allow for easy reporting of that information. Once things are submitted in to MACPro they're stored in the database and reports can be run off of the information. It will be easier to answer questions about eligibility provisions across states, and, again, you have a historical record of anything that you have submitted within the system.

I hope the demonstration was helpful for you. I think that we have one more PRA Webinar that we will be conducting, and as we've mentioned a couple of times, you are viewing development in process so for the next Webinar there may be some additional screens that you did not see today that might be available to you.

Darlene, do you have some closing remarks you would like to make?

D. Anderson I do. Thanks, Marge and Randy. This concludes our series of four Webinars. As Marge has indicated we have another post-development Webinar which will satisfy our 30 day comment period, but these demonstrations have been presented to satisfy our PRA requirements for the first 60 day comment period. Again, following the 60 day comment period we will be presenting one post-development Webinar, which will satisfy the 30 day period.

Comments and/or recommendations for the 60 day comment period must be submitted by August 7, 2012. Detailed instructions for submitting comments can be found in the Federal Registry Notice, Volume 77, Number 111, dated Friday, June 8, 2012, or by following the PRA comment link located beneath the Webinar announcement on our Medicaid.gov website.

Thank you all for participating and we look forward to your comments and feedback. Have a good afternoon.

Moderator Ladies and gentlemen, this conference will be made available for replay after 4:00 p.m. Eastern today through July 18th at midnight. You may access the AT&T Executive Playback Service at any time by dialing 1-800-475-6701 and entering the access code 250089.

That does conclude our conference for today. Thank you for your participation and for using AT&T Executive TeleConference Service. You may now disconnect.