



# **Introductory Reference Document for MACPro Roles and Administration**

**Reflects MACPro Environment as of 09/13/2016**

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# Welcome to the Introductory Reference Document for MACPro Roles and Administration

This Reference Document for Medicaid and CHIP Program System (MACPro) Roles and Administration describes the steps CMS and state users follow to request, review, approve, or deny role requests within MACPro. Please contact the Help Desk if you have any questions outside the scope of this document.

## Help Desk and Technical Assistance

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, please fill out the Request System Help form in the MACPro system. You may also contact the MACPro Help Desk at [MACPro\\_HelpDesk@cms.hhs.gov](mailto:MACPro_HelpDesk@cms.hhs.gov) or call 301-547-4688.

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

Records / Adult Quality Measures  
**GA - Adult Quality Measure (GA2016AQM\_1601) - 2016** Follow

CMS-10434 OMB 0938-1188

[Request System Help](#)  
[View Implementation Guide](#)

### Core Measures in Report

Core Measure	Status	
Adult Body Mass Index Assessment (ABA)	Complete	✓
Antidepressant Medication Management (AMM)	Complete	✓
Breast Cancer Screening (BCS)	Complete	✓
Controlling High Blood Pressure (CBP)	Complete	✓
Cervical Cancer Screening (CCS)	Complete	✓
Screening for Clinical Depression and Follow-Up Plan (CDF)	Complete	✓

A form will open in a new tab to avoid interrupting your reporting. The User ID, User Name, and Email fields will be prepopulated from your User Profile. Fill out all required fields (marked by red asterisks) and then select "Submit Help Request". Your request will be sent to the MACPro Help Desk.

### Request System Help

User ID JANEDOE	User Name Doe,Jane
Email macpro_helpdesk@cms.hhs.gov	Phone Number* <input type="text"/>

### Issue Details

Category* <input type="text" value="Select"/>	Sub Category <input type="text" value="Select"/>
Package ID <input type="text"/>	Component <input type="text"/>
Step in workflow <input type="text"/>	Action attempting to be performed <input type="text"/>
Deadline for completion <input type="text" value="M/d/yyyy"/>	
Description* <input type="text"/>	

Character count: 0/4000 - Please include a detailed description of your issue, list of steps you performed that resulted in your issue, and attach screenshots (if applicable).

### Upload Documents

Saved Documents

- Maximum documents that can be uploaded: 3
- Maximum file size : 2MB
- Valid file extensions: pdf, ppt, doc, docx, xlsx, xls, pptx

No file selected.

## Prerequisites for Obtaining a MACPro Role

Before requesting a role within the MACPro Application, you must have an EIDM ID and an EIDM Role for MACPro.

EIDM is an identity management and services system that provides users with access to a variety of CMS applications. An EIDM account ensures that only authorized and registered users can access protected information and systems through the CMS Enterprise Portal. Once the process is complete, users will access MACPro through EIDM.

All MACPro users, regardless of user role, will be required to have an EIDM ID and EIDM Role for MACPro. MACPro users must have a MACPro CMS Staff User Role, MACPro State User Role, or MACPro Business Support User Role in EIDM. Please note that the MACPro CMS Staff User Role, MACPro State User Role, and MACPro Business Support User Role cannot be held concurrently in EIDM.

Users may register for an EIDM ID by going to <https://portal.cms.gov> and selecting “New User Registration.”

For further guidance on registering an EIDM ID and requesting an EIDM ID Role for MACPro access please reference [EIDM Instructions for MACPro Users](#).

## What is a MACPro Role?

A number of distinct roles have been established for the Centers for Medicare and Medicaid Services (CMS) users, state MACPro users, and MACPro Business Support users. These roles determine in what capacity a user will utilize the application.

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

Please refer to [Table 1](#) and [Table 2](#) below for details on MACPro roles and their descriptions.

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

**Table 1: MACPro CMS User Roles**

<b>EIDM Role Name</b>	<b>MACPro Role Name</b>	<b>Component</b>	<b>Role Description</b>	<b>Role Sharing Limitations</b>	<b>Role Approver</b>
MACPro CMS Staff User	CMS Package Approver	State Plan	<ul style="list-style-type: none"> <li>Evaluates recommended dispositions of approval</li> <li>Approves Medicaid and CHIP SPA packages</li> </ul>	Cannot request CMS System Administrator (CSA)	CSA
MACPro CMS Staff User	CMS Package Disapproval Coordinator	State Plan	<ul style="list-style-type: none"> <li>Tailors disapproval notice to the state</li> <li>Assembles disapproval package</li> <li>Coordinates the Official submission package through the CMS senior review and clearance process for recommended disapprovals</li> </ul>	Cannot request CSA	CSA
MACPro CMS Staff User	CMS Package Disapprover	State Plan	<ul style="list-style-type: none"> <li>Evaluates recommended dispositions of disapproval, including disapproval justification</li> <li>Disapproves Medicaid and CHIP SPA packages</li> </ul>	Cannot request CSA	CSA

<b>EIDM Role Name</b>	<b>MACPro Role Name</b>	<b>Component</b>	<b>Role Description</b>	<b>Role Sharing Limitations</b>	<b>Role Approver</b>
MACPro CMS Staff User	CMS Point of Contact (CPOC)	State Plan	<ul style="list-style-type: none"> <li>• Oversees the review of Draft and Official submissions</li> <li>• Maintains the composition of the review team (selects SRT and SME members)</li> <li>• Documents and reviews correspondence log entries</li> <li>• Reviews and compiles review team comments</li> <li>• Recommends a disposition for an Official submission package</li> <li>• Requests clarifications and additional information from the state</li> <li>• Tailors approval notice to the state</li> <li>• Sets and manages internal milestones and reminders for the SRT, SME, and Sr. Reviewers</li> <li>• Oversees the Official submission package through the CMS senior review process for recommended approvals</li> </ul>	Cannot request CSA	CMS Role Approver (CRA)
MACPro CMS Staff User	CMS Report Admin	State Plan	<ul style="list-style-type: none"> <li>• Requests/views all reports on behalf of CMS Senior staff</li> <li>• Views submission packages on behalf of CMS Senior staff</li> </ul>	Cannot request CSA	CSA

<b>EIDM Role Name</b>	<b>MACPro Role Name</b>	<b>Component</b>	<b>Role Description</b>	<b>Role Sharing Limitations</b>	<b>Role Approver</b>
MACPro CMS Staff User	CMS Role Approver (CRA)	State Plan	<ul style="list-style-type: none"> <li>• Approves CPOC, SRT and SME role requests</li> <li>• Views/monitors staff workload and package assignments</li> <li>• Reassigns CPOC tasks</li> <li>• Disassociates CMS users from CPOC, SRT and SME roles</li> </ul>	Cannot request CSA	CSA
MACPro CMS Staff User	CMS Senior Reviewer	State Plan	<ul style="list-style-type: none"> <li>• Requests/views all system reports</li> <li>• Evaluates recommended dispositions</li> <li>• Reviews the disapproval justification</li> <li>• Reviews and approves CMS interpretations of federal statute, regulation and CMS policy (future)</li> </ul>	Cannot request CSA	CSA
MACPro CMS Staff User	CMS Subject Matter Expert (SME)	State Plan	<ul style="list-style-type: none"> <li>• Participates on a SRT upon CMS POC request</li> <li>• Provides and maintains Internal Policy Notes</li> <li>• Submits federal statute, regulation and CMS policy interpretations for senior management approval (future)</li> <li>• Maintains federal statute, regulation and CMS policy interpretations (future)</li> </ul>	Cannot request CSA	CRA
MACPro CMS Staff User	CMS Submission Review Team (SRT)	State Plan	<ul style="list-style-type: none"> <li>• Receives package review assignments</li> <li>• Reviews and submits comments for Draft and Official submissions</li> <li>• Provides assessments for submission package RUs</li> </ul>	Cannot request CSA	CRA

EIDM Role Name	MACPro Role Name	Component	Role Description	Role Sharing Limitations	Role Approver
MACPro CMS Staff User	CMS Subscriber	State Plan	<ul style="list-style-type: none"> <li>Views read-only versions of state submission packages</li> <li>Subscribes to particular states or areas of interest</li> </ul>	Cannot request CSA	CSA
MACPro CMS Staff User	CMS System Administrator (CSA)	State Plan and Quality Measures	<ul style="list-style-type: none"> <li>Approves CMS System Admin and State Sys Admin role requests</li> <li>Reassigns CMS tasks to other CMS users</li> <li>Disassociates CMS users from roles</li> <li>Requests/views all system reports</li> <li>Maintains MACPro system files, parameters, etc. for CMS</li> </ul>	Cannot request any other user role	CSA  *Please note that a user may not approve their own role.
MACPro CMS Staff User	CMS CO Administrator	Quality Measures	<ul style="list-style-type: none"> <li>CMS Central Office staff with direct responsibility for implementing and/or administering the quality measurement programs</li> <li>Approves CMS CO/RO, CMS Contractor CO Admin, and CMS Contractor roles</li> </ul>	Cannot request CSA	CSA
MACPro CMS Staff User	CMS CO/RO	Quality Measures	<ul style="list-style-type: none"> <li>CMS Central Office staff with no direct responsibility for implementing and/or administering the quality measurement programs, but who may be interested in state reporting of the measures</li> </ul>	Cannot request CSA	CMS CO Admin

<b>EIDM Role Name</b>	<b>MACPro Role Name</b>	<b>Component</b>	<b>Role Description</b>	<b>Role Sharing Limitations</b>	<b>Role Approver</b>
MACPro Business Support User	Researcher	Quality Measures	<ul style="list-style-type: none"> <li>• CMS support user with no direct responsibility for implementing or administering the quality measurement programs, but has CMS-related or approved business needs for which access to state reporting of the quality measures is necessary/required</li> </ul>	Cannot request any other user role	CMS CO Admin
MACPro Business Support User	Technical Assistance/ Analytic Support	Quality Measures	<ul style="list-style-type: none"> <li>• CMS support user associated with central office quality measurement staff with direct responsibility for helping CMS to implement and/or administer quality measurement programs</li> </ul>	Cannot request any other user role	CMS CO Admin

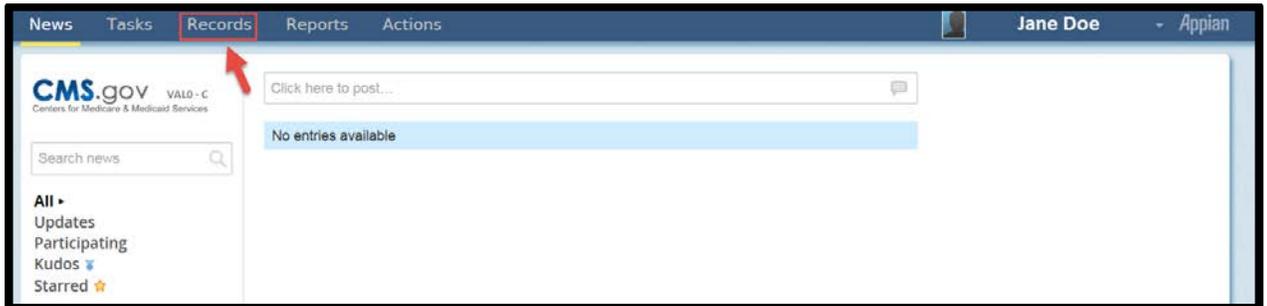
## Table 2: MACPro State User Roles

*Please note: The role descriptions in Table 2 include functions for users with access to Quality Measures and State Plan. You may not have all functionality included in this role description depending on your access.*

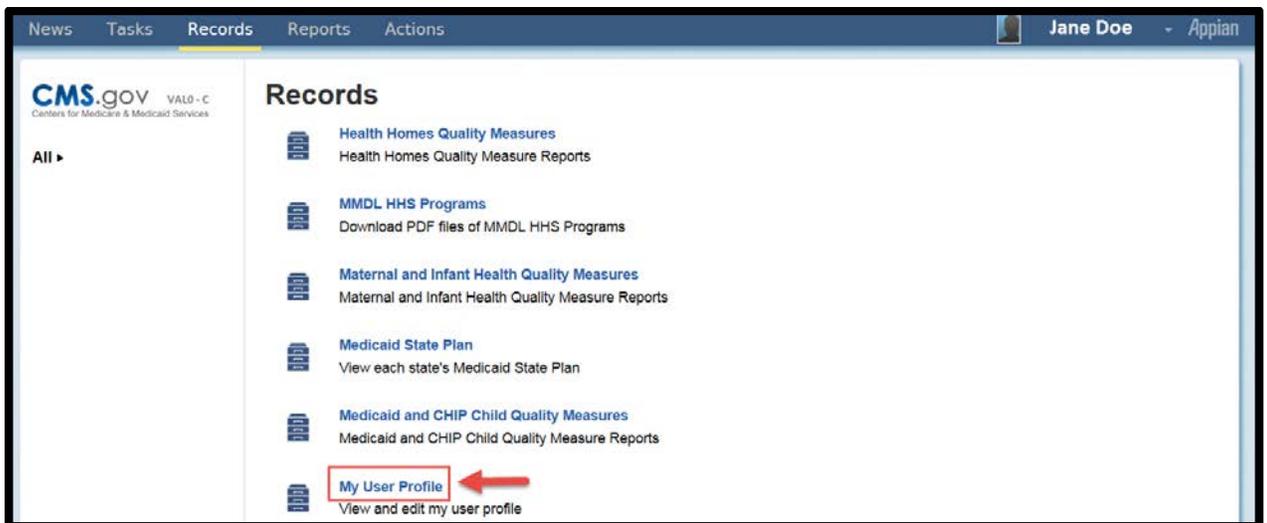
EIDM Role Name	MACPro Role Name	Role Description	Role Sharing Limitations	Role Approver
MACPro State User	State Director (SDIR)	<ul style="list-style-type: none"> <li>Reviews QM reports or submission packages</li> <li>Certifies the QM report or submission package</li> </ul>	No restriction (All state roles may be requested)	SSA
MACPro State User	State Editor (SE)	<ul style="list-style-type: none"> <li>Provides content to the submission package or QM report</li> <li>Creates/assembles the QM report, draft or official submission package prior to submission</li> <li>Converts Draft packages to Official packages</li> </ul>	No restriction (All state roles may be requested)	SSA
MACPro State User	State Point of Contact (SPOC)	<ul style="list-style-type: none"> <li>Serves as the primary contact for all state submissions</li> <li>Reviews and may update submission package or QM report content</li> <li>Submits Draft and Official submission packages</li> <li>Un-certifies QM reports</li> <li>Documents and reviews correspondence log entries</li> <li>Responds to the RAI/SMI</li> </ul>	No restriction (All state roles may be requested)	SSA
MACPro State User	State System Administrator (SSA)	<ul style="list-style-type: none"> <li>Creates and maintains the State Profile</li> <li>Approves state role requests</li> <li>Requests/views all system reports for the state</li> <li>Maintains MACPro system files, parameters, etc. for the state</li> </ul>	No restriction (All state roles may be requested)	CSA

## Viewing Your User Profile

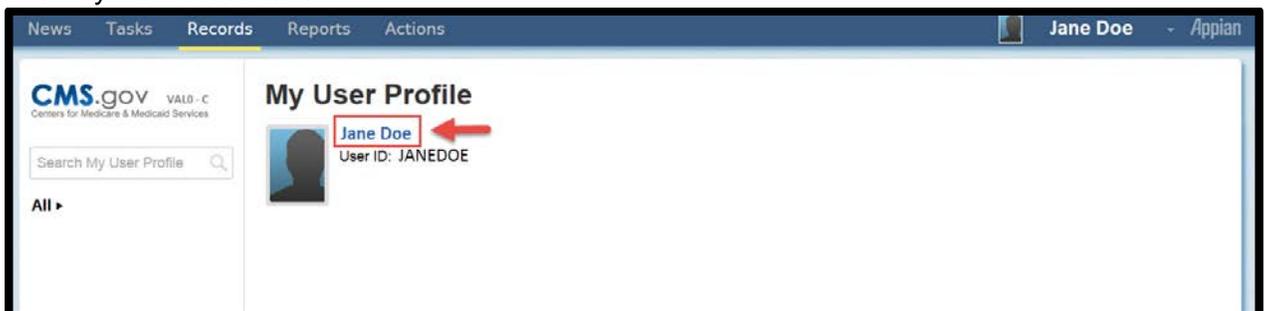
1. Log into MACPro.
2. Select the “Records” tab from the upper toolbar.



3. Select “My User Profile.”



4. Select your User Name.



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

The screenshot shows the 'Records / My User Profile' page for Jane Doe. The page includes a navigation bar with 'News', 'Tasks (2)', 'Records', 'Reports', and 'Actions'. The user's name 'Jane Doe' is displayed with a 'Follow' button. The 'Basic Information' section shows: First Name: Jane, Last Name: Doe, Type of MACPro User (EIDM Role): State User, User ID: JANEDOE, Email Address: [redacted], and Primary Phone Number: [redacted]. The 'Approved Roles' section contains a table with one entry: State Director (SDIR) for Medicaid, Quality Measure Reporting (QMR), with Authority: All, State/Territory: [redacted], Approved By: JOHNDOE8, and Date Approved: 10/14/2016. A 'Show Advanced Options' link is visible at the bottom right of the table.

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved
State Director (SDIR)	Medicaid	Quality Measure Reporting (QMR)	All	[redacted]	JOHNDOE8	10/14/2016

- By selecting “Show Advanced Options”, you will be able to customize the view of your approved roles.

This screenshot is identical to the previous one, but a red arrow points to the 'Show Advanced Options' link, which is enclosed in a red rectangular box. This link is located at the bottom right of the 'Approved Roles' table.

7. You may check the boxes next to the fields that you wish to show in your Approved Roles table. Available fields are State/Territory, Program, Component, Authority, Region, Office Type, Approved By, Date Approved, Tasks, and Title (for notice).

The screenshot shows the user profile for Jane Doe. Under the 'Approved Roles' section, there is a 'Show/Hide Columns' list with the following items:
 

- State / Territory
- Program
- Component
- Authority
- Region
- Office Type
- Approved By
- Date Approved
- Tasks
- Title (for Notice)

 A red arrow points to the 'Tasks' checkbox, which is currently unchecked.

- a. If the checkbox next to “Tasks” is selected, you will be able to determine if one of your approved roles has any accepted tasks within MACPro.

The screenshot shows the 'Approved Roles' table with the 'Tasks' column visible. The 'Show/Hide Columns' list has 'Tasks' checked and highlighted with a red box. A red arrow points to the 'Tasks' column header in the table, which also has a 'View Accepted Tasks' link. The table contains one row of data:

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved	Tasks
State Director (SDIR)	Medicaid	Quality Measure Reporting (QMR)	All		JOHNDOE8	10/14/2016	<a href="#">View Accepted Tasks</a>

- b. By selecting the link to “**View Accepted Tasks**,” a list of accepted tasks will be shown below the Approved Roles table.

**Approved Roles** [Hide Advanced Options](#)

Show/Hide Columns

- State / Territory
- Program
- Component
- Authority
- Region
- Office Type
- Approved By
- Date Approved
- Tasks
- Title (for Notice)

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved	↓ Tasks
State Director (SDIR)	Medicaid	Quality Measure Reporting (QMR)	All		JOHNDOE8	10/14/2016	<a href="#">Hide Accepted Tasks</a>

Tasks ⓘ

- Review & Certify Report:



- c. To hide the list of approved tasks, select the link to “**Hide Accepted Tasks**” in the Tasks column.

**Approved Roles** [Hide Advanced Options](#)

Show/Hide Columns

- State / Territory
- Program
- Component
- Authority
- Region
- Office Type
- Approved By
- Date Approved
- Tasks
- Title (for Notice)

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved	↓ Tasks
State Director (SDIR)	Medicaid	Quality Measure Reporting (QMR)	All		JOHNDOE8	10/14/2016	<a href="#">Hide Accepted Tasks</a>

Tasks ⓘ

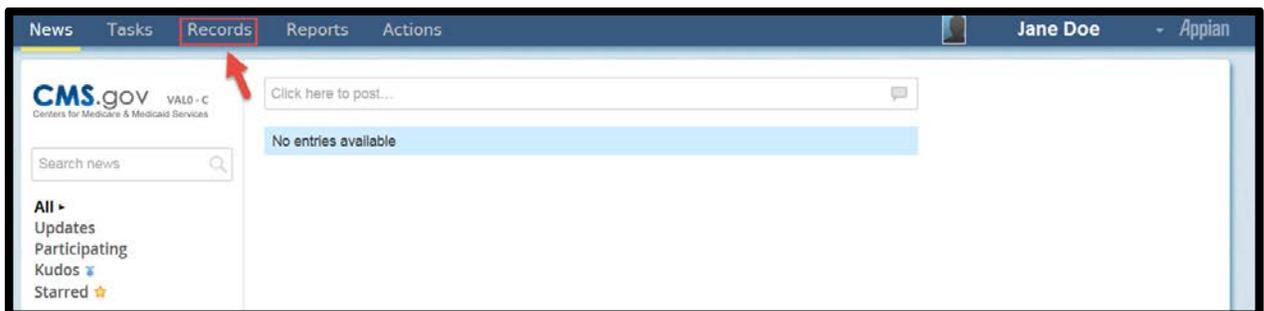
- Review & Certify Report:



## Entering and Editing Your Front Line Manager

*Please Note: This feature is for CMS Users only. Entering and editing your Front Line Manager is for records purposes and does not have an impact on who approves your roles within MACPro. CMS Users must enter a Front Line Manager before requesting a role.*

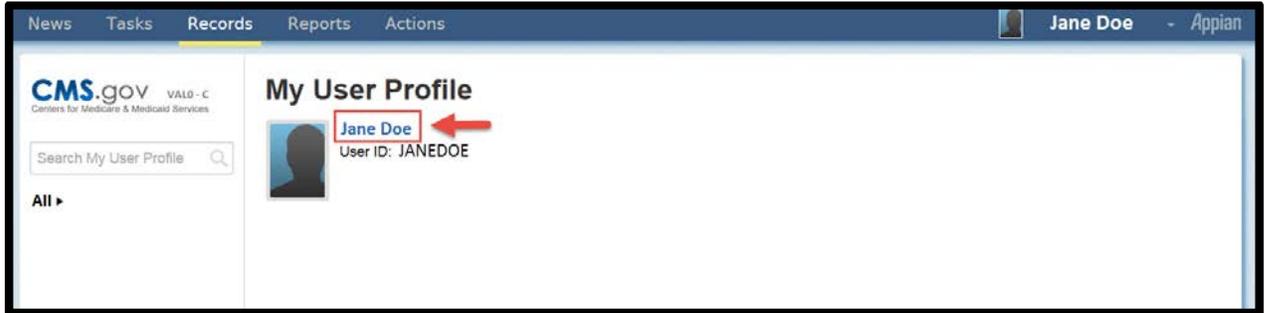
1. Log into MACPro
2. Select the “**Records**” tab from the upper toolbar.



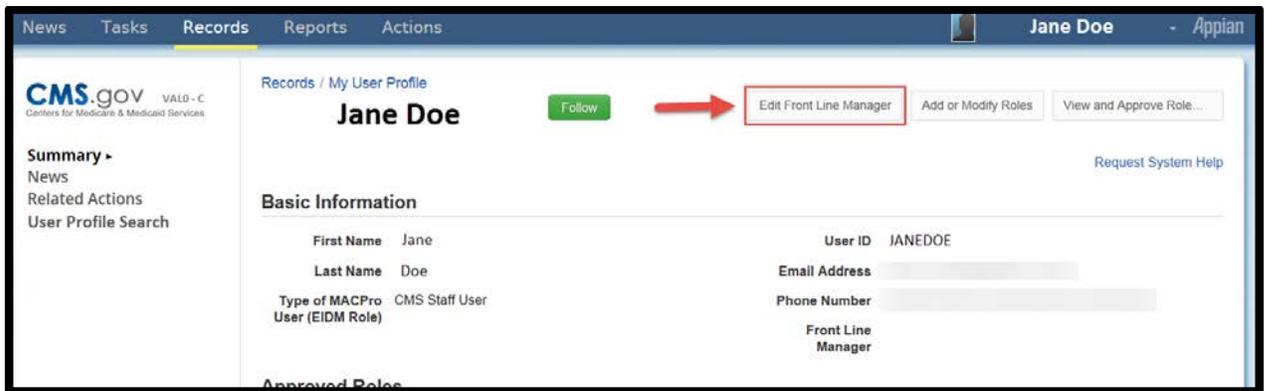
3. Select “**My User Profile**”.



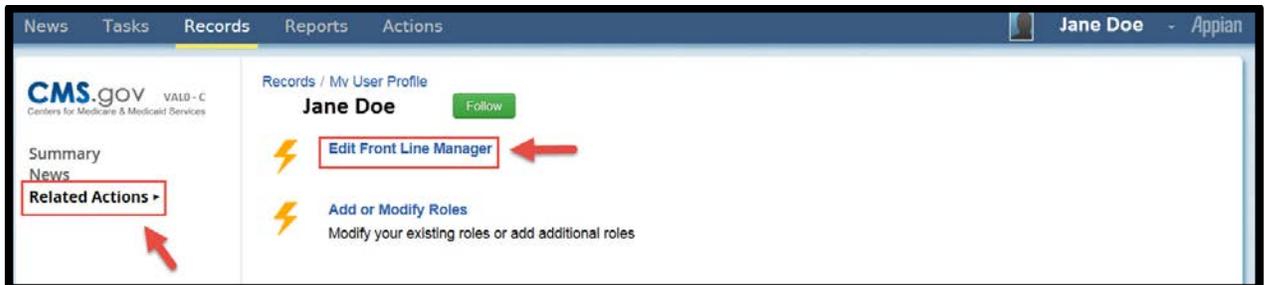
4. Select your **Name**.



5. In the upper right corner of the screen, select the button labeled **“Edit Front Line Manager”**.



Alternatively, you can select **“Related Actions”** from the left hand toolbar and select **“Edit Front Line Manager”**.



6. Enter your Front Line Manager's First and Last Name in the appropriate text boxes.

The screenshot shows the 'Edit Front Line Manager Details' page. The navigation bar includes 'News', 'Tasks', 'Records' (highlighted), 'Reports', and 'Actions'. The user 'Jane Doe' is logged in. The page title is 'Edit Front Line Manager Details'. Under the 'Front Line Manager' section, there are two text input fields: '\* First Name' and '\* Last Name'. Below these fields are 'Cancel' and 'Submit' buttons. The 'Submit' button is highlighted in green.

7. Select the green button labeled "Submit".

This screenshot shows the same 'Edit Front Line Manager Details' page, but now the 'First Name' field contains 'Katie' and the 'Last Name' field contains 'Training'. A red arrow points to the green 'Submit' button, which is also highlighted with a red box.

8. Edits made to your Front Line Manager will be reflected in your User Profile.

The screenshot shows the 'Jane Doe' user profile page. The navigation bar is the same. The page title is 'Jane Doe'. There are buttons for 'Edit Front Line Manager', 'Add or Modify Roles', and 'View and Approve Role...'. A 'Follow' button is also present. The 'Basic Information' section shows: First Name: Jane, Last Name: Doe, Type of MACPro User (EIDM Role): CMS Staff User, User ID: JANEDOE, Email Address: [redacted], Phone Number: [redacted], and Front Line Manager: Katie Training. A red arrow points to the 'Katie Training' text in the Front Line Manager field.

9. If you attempt to request a role before your Front Line Manager has been captured, you will receive a validation error stating that a value must be entered in these fields.

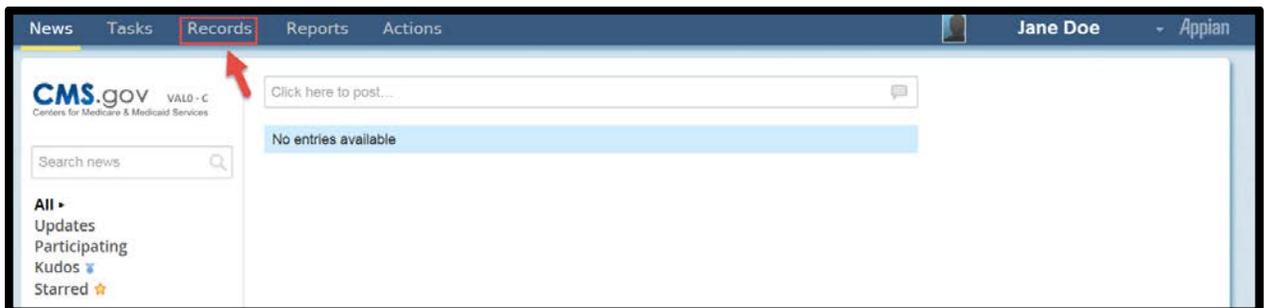
The screenshot shows the 'MACPro User Role Request' form in the 'Records' tab. The user is Jane Doe. The form is titled 'Front Line Manager' and contains two input fields: '\* First Name' and '\* Last Name'. Both fields are empty and have a red box with the text 'A value is required' and a red arrow pointing to them. Below these fields are sections for 'Current Role(s)' (showing 'No Roles to display') and 'Add Role(s)'. The 'Add Role(s)' section contains a table with columns: Role, Program, Component, Authority, Office Type, Region, State, Notes/Info, and Title (for Notice). The table has one row with the following values: CMS Subm, Medicaid, State Plan, Health Hon, Central Off, All, All, View/ Edit, and an empty field with a red X. At the bottom of the form are buttons for 'Cancel', 'Check Validation', and 'Request Roles'.

Role	Program	Component	Authority	Office Type	Region	State	Notes/Info	Title (for Notice)
CMS Subm	Medicaid	State Plan	Health Hon	Central Off	All	All	View/ Edit	

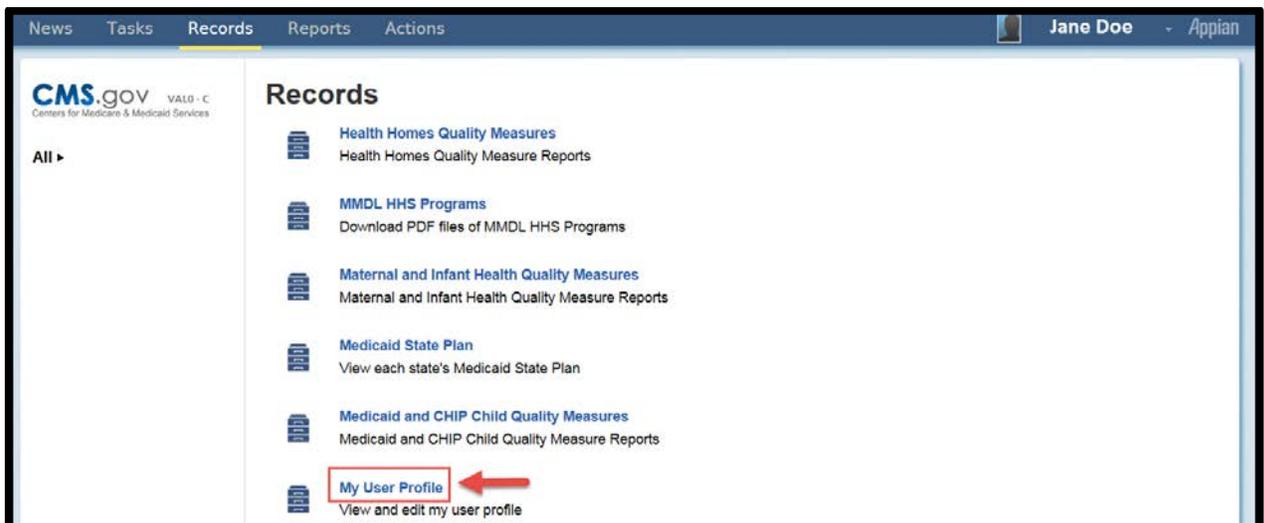
## Requesting a Role

*Please Note: Once you submit a role request, you will not be able to request additional roles until those roles are approved or denied.*

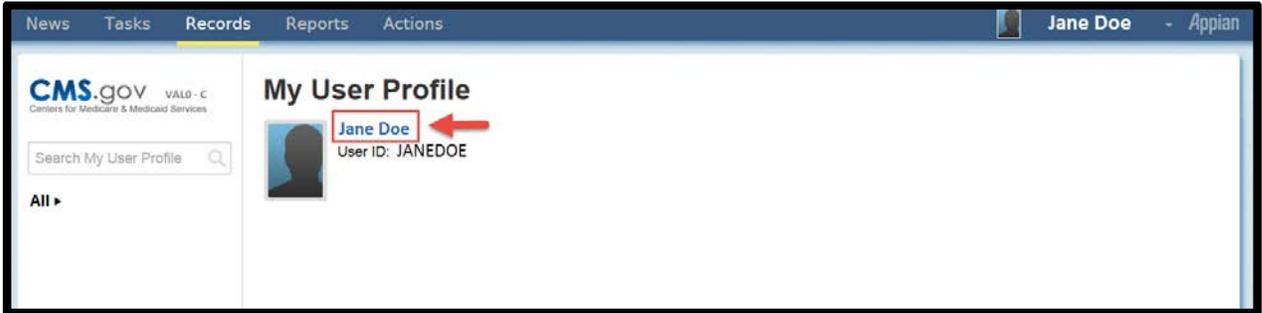
1. Log into MACPro.
2. Select the “**Records**” tab from the upper toolbar.



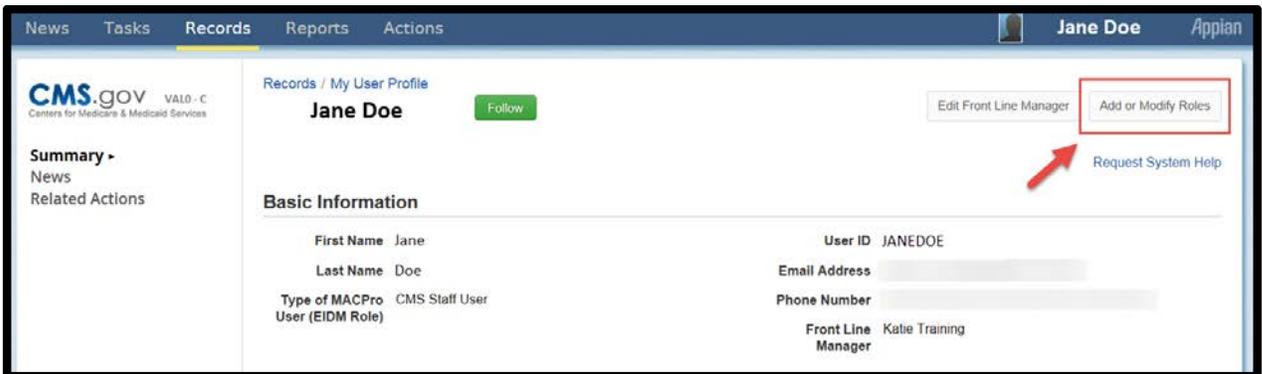
3. Select “**My User Profile**”.



4. Select your **Name**.



5. In the upper right hand corner of the screen, select the button labeled **“Add or Modify Roles”**.



Alternatively, you can select **“Related Actions”** from the left hand toolbar and select **“Add or Modify Roles”**.



- To add a role, select the appropriate Role, Program, Component, Authority, Office Type, Region, and State from the drop down lists in the “Add Role(s)” section. These fields are dynamic and will populate based on selection.

News Tasks **Records** Reports Actions Jane Doe Applan

**CMS.gov** VALD - C  
Centers for Medicare & Medicaid Services

### MACPro User Role Request

Front Line Manager

\*First Name  \*Last Name

Current Role(s)

No Roles to display

Add Role(s)

Role	Program	Component	Authority	Office Type	Region	State	Notes/Info	Title (for Notice)
-- Select --	View/ Edit	<input type="text"/> X						

Cancel Check Validation Request Roles

7. By selecting the link in the “Notes/Info” column labeled “View/Edit”, you will see an “Edit Note” field to leave an optional note to your role approver. Additionally, there will be a description for the selected role along with rules for what is allowed for each field.

**Add Role(s)** +/-

Role ?	Program	Component	Authority	Office Type	Region	State	Notes/Info ?	Title (for Notice)	
CMS Point	Medicaid	State Plan	All	Central Off	All	All	<a href="#">View/Edit</a>		X

+ Add Role

Cancel Check Validation Request Roles



**Add Role(s)** +/-

Role ?	Program	Component	Authority	Office Type	Region	State	Notes/Info ?	Title (for Notice)	
-- Select --	<a href="#">Hide</a>		X						

**Edit Note**

Character count: 0/4000

8. You may request multiple roles at once by selecting the link labeled “Add Role”.

**Add Role(s)** +/-

Role <a href="#">?</a>	Program	Component	Authority	Office Type	Region	State	Notes/Info <a href="#">?</a>	Title (for Notice)	
CMS Point <input type="checkbox"/>	Medicaid <input type="checkbox"/>	State Plan <input type="checkbox"/>	All <input type="checkbox"/>	Central Off <input type="checkbox"/>	All <input type="checkbox"/>	All <input type="checkbox"/>	<a href="#">View/ Edit</a>		✘
<a href="#">+ Add Role</a> 									

9. To remove a role request, select the red “x”.

**Add Role(s)** +/-

Role <a href="#">?</a>	Program	Component	Authority	Office Type	Region	State	Notes/Info <a href="#">?</a>	Title (for Notice)	
CMS Point <input type="checkbox"/>	Medicaid <input type="checkbox"/>	State Plan <input type="checkbox"/>	All <input type="checkbox"/>	Central Off <input type="checkbox"/>	All <input type="checkbox"/>	All <input type="checkbox"/>	<a href="#">View/ Edit</a>		✘ 
<a href="#">+ Add Role</a>									

10. Once you have finished filling out the required fields, select the button in the bottom right hand of the screen labeled “**Check Validation**”.

The screenshot shows the 'MACPro User Role Request' form. At the top, there are navigation tabs: News, Tasks, Records, Reports, and Actions. The user 'Jane Doe' is logged in. The form title is 'MACPro User Role Request' and the user is identified as 'Front Line Manager'. There are input fields for 'First Name' (Katie) and 'Last Name' (Training). Below these are two tables for roles. The 'Current Role(s)' table has one row with columns: Role (CMS Point of Contact (CPOC)), Program (Medicaid), Component (State Plan), Authority (All), Office Type (Central Office), Region (All), State (All), Notes/Info (View/ Edit), and Title (for Notice). The 'Add Role(s)' table has one row with columns: Role (CMS Pack), Program (Medicaid), Component (State Plan), Authority (All), Office Type (Central Off), Region (All), State (N/A), Notes/Info (View/ Edit), and Title (for Notice) with a red 'X' in the last cell. At the bottom, there are buttons for 'Cancel', 'Check Validation' (highlighted with a red box and a red arrow), and 'Request Roles'.

11. If validation errors are present, they will be listed below the Add Role(s) table. All validation errors must be fixed before you may request the roles.

**Please Note:** In the validation error example below, this error was received because the user requested a role with the exact same attributes as the user's current role.

### Current Role(s)

+/-

Role ⓘ	Program	Component	Authority	Office Type	Region	State	Notes/Info ⓘ	Title (for Notice)
CMS Point of Contact (CPOC)	Medicaid ▾	State Plan ▾	All ▾	Central Office ▾	All ▾	All ▾	<a href="#">View/ Edit</a>	

### Add Role(s)

+/-

Role ⓘ	Program	Component	Authority	Office Type	Region	State	Notes/Info ⓘ	Title (for Notice)	
CMS Point ▾	Medicaid ▾	State Plan ▾	All ▾	Central Off ▾	All ▾	All ▾	<a href="#">View/ Edit</a>		✗

+ Add Role

**Validation Error:** Duplicate Requests for CMS Point of Contact (CPOC)

12. If validation is passed, you may select the green button labeled “Request Roles”

News Tasks **Records** Reports Actions Jane Doe - Appian

**CMS.gov** VALO - C  
Centers for Medicare & Medicaid Services

### MACPro User Role Request

Front Line Manager

\*First Name: Katie \*Last Name: Training

**Current Role(s)**

Role	Program	Component	Authority	Office Type	Region	State	Notes/Info	Title (for Notice)
CMS Point of Contact (CPOC)	Medicaid	State Plan	All	Central Office	All	All	View/ Edit	

**Add Role(s)**

Role	Program	Component	Authority	Office Type	Region	State	Notes/Info	Title (for Notice)
CMS Pack:	Medicaid	State Plan	All	Central Offi	All	N/A	View/ Edit	Technical

+ Add Role

Validation Error: None - Validation Passed

Cancel Check Validation **Request Roles**

13. You will receive a message asking if you are sure you want to request these roles. The message also notes that you will not be able to request additional roles until these roles are approved or denied. Select “Yes”.

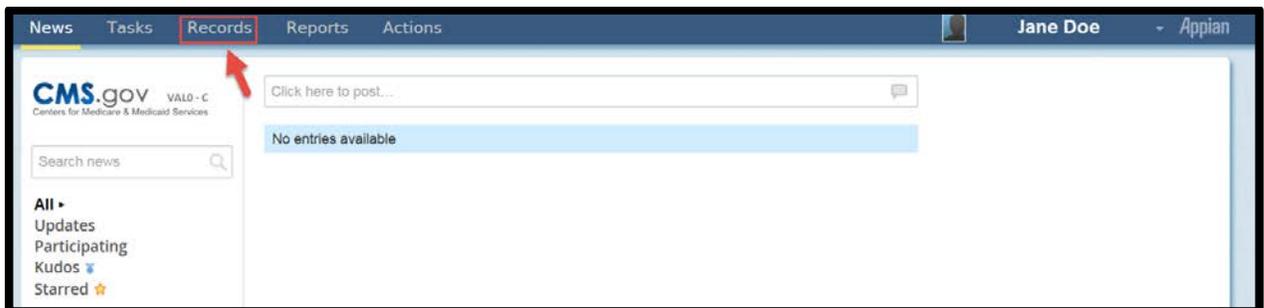
Are you sure you want to request these roles?  
You will not be able to request additional roles  
until these roles are approved/denied.

No **Yes**

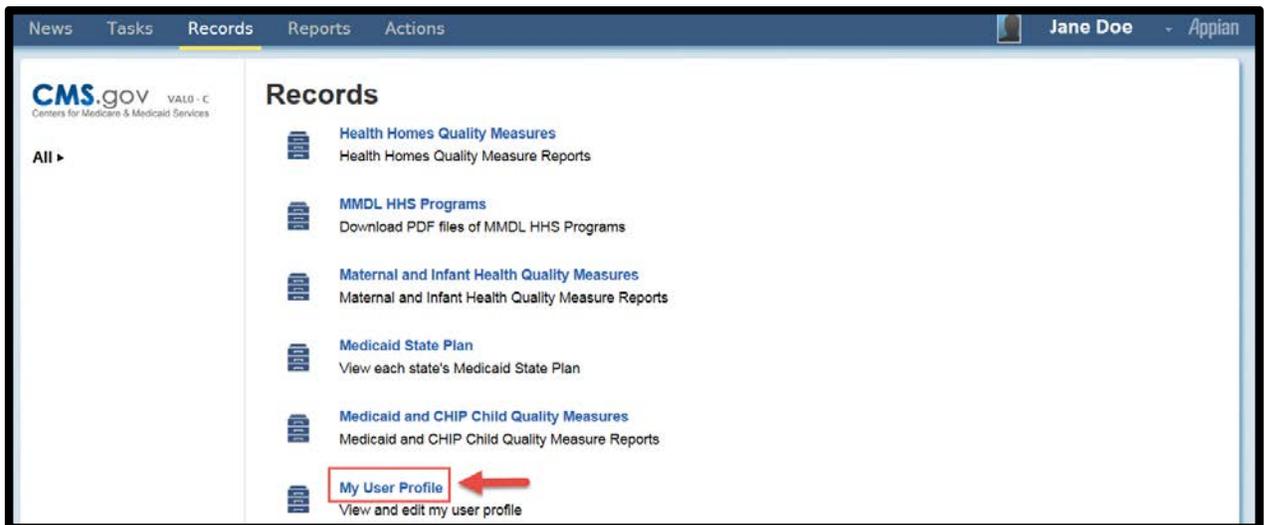
## Requesting Additional Roles or Modifying Existing Roles

*Please Note: If you request to modify a role that has an open and accepted task, a validation error will appear stating that the role cannot be requested due to open tasks. Complete your open tasks and try again.*

1. Log into MACPro.
2. Select the “**Records**” tab from the upper toolbar.



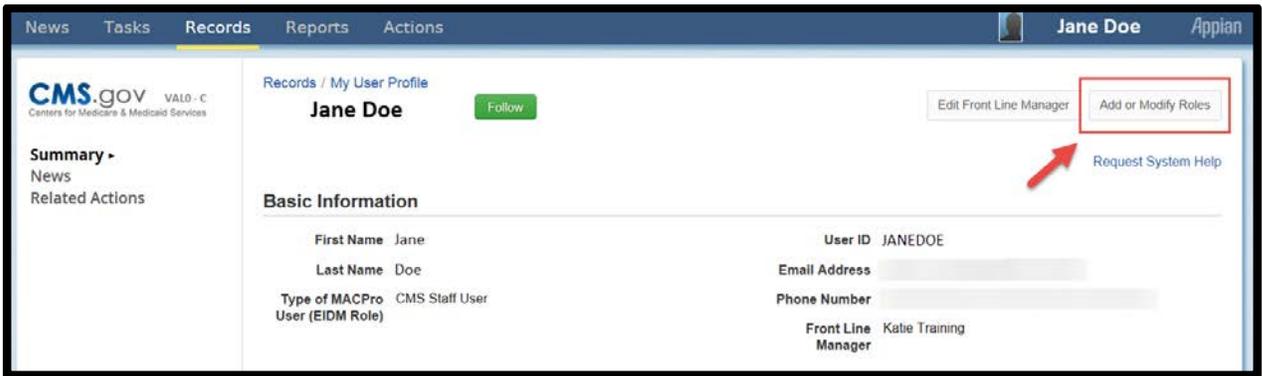
3. Select “**My User Profile**”.



4. Select your **Name**.



5. Select the button in the upper right corner of the screen labeled “**Add or Modify Roles**”.



Alternatively, you can select “**Related Actions**” from the left hand toolbar and select “**Add or Modify Roles**”.



- Your current roles will be listed at the top of the screen.

### MACPro User Role Request

Front Line Manager

+/-

\* First Name  \* Last Name

---

**Current Role(s)**

+/-

Role ?	Program	Component	Authority	Office Type	Region	State	Notes/Info ?	Title (for Notice)
CMS Point of Contact (CPOC)	Medicaid ▾	State Plan ▾	All ▾	Central Office ▾	All ▾	All ▾	<a href="#">View/ Edit</a>	<input type="text"/>

- To add a role, select the appropriate Role, Program, Component, Authority, Office Type, Region, and State from the drop down lists in the “Add Role(s)” section. These fields are dynamic and will populate based on your selections.

News Tasks **Records** Reports Actions
Jane Doe Appian

**CMS.gov** VALD - C  
Centers for Medicare & Medicaid Services

Summary  
News  
**Related Actions >**

### MACPro User Role Request

Front Line Manager

+/-

\* First Name  \* Last Name

---

**Current Role(s)**

+/-

No Roles to display

**Add Role(s)**

+/-

Role ?	Program	Component	Authority	Office Type	Region	State	Notes/Info ?	Title (for Notice)
-- Select -- ▾	<a href="#">View/ Edit</a>	<input type="text"/> <span style="float: right;">✕</span>						

8. To modify a current role, you may modify the fields under the “**Current Role(s)**” section.

**Current Role(s)** +/-

Role 	Program	Component	Authority	Office Type	Region	State / Territory	Notes/Info 	Title (for Notice)
CMS Point of Contact (CPOC)	Medicaid <input type="text"/>	Medicaid Stat <input type="text"/>	All <input type="text"/>	Central Office <input type="text"/> -- Select -- Central Office Regional Office	All <input type="text"/>	All <input type="text"/>	<a href="#">View/ Edit</a>	<input type="text"/>

**Add Role(s)**

- By selecting the link in the “Notes/Info” column labeled “View/Edit”, you will see an “Edit Note” field to leave an optional note to your role approver. This feature is available when a user is modifying an existing role or adding a new role. A description for the selected role along with rules for what is allowed for each field will also be shown.

The screenshot shows the 'MACPro User Role Request' form. The user is logged in as Jane Doe. The form includes a navigation bar with 'News', 'Tasks', 'Records', 'Reports', and 'Actions'. The main content area is titled 'MACPro User Role Request' and includes a 'Request System Help' link. The form is divided into sections: 'Summary', 'News', and 'Related Actions'. The 'Front Line Manager' section contains input fields for 'First Name' (Katie) and 'Last Name' (Training). The 'Current Role(s)' section contains a table with columns: Role, Program, Component, Authority, Office Type, Region, State / Territory, Notes/Info, and Title (for Notice). The 'Notes/Info' column for the 'CMS Point of Contact (CPOC)' role has a 'View/Edit' link highlighted with a red box and a red arrow.

Role	Program	Component	Authority	Office Type	Region	State / Territory	Notes/Info	Title (for Notice)
CMS Point of Contact (CPOC)	Medicaid	Medicaid Sta	All	Central Office	All	All	View/Edit	

The screenshot shows the 'MACPro User Role Request' form after clicking the 'View/Edit' link. The 'Notes/Info' column now shows 'Hide'. Below the table is an 'Edit Note' field with a character count of 0/4000. Below the 'Edit Note' field is a section for role details, including the role name, description, and various attributes.

**Edit Note**

Character count: 0/4000

<b>Role Name</b> CMS Point of Contact (CPOC)	<b>Program</b> Defaulted to Medicaid
<b>Role Description</b> * Oversees the review of Draft and Official submissions Approves and maintains the composition of the review team (selects SRT and SME members) Documents and reviews correspondence log entries Reviews and compiles review team comments Recommends a disposition (Approval or Disapproval) for an Official submission package Requests clarifications and additional information from the state Tailors approval notice to the state Sets and manages internal milestones and reminders for the SRT, SME and Sr. Reviewers Oversees the Official submission package through the CMS senior review process for recommended approvals	<b>Component</b> Defaulted to Medicaid State Plan (MSP)
	<b>Authority</b> All
	<b>Office Type</b> One Only
	<b>Region</b> One or Multiple
	<b>State/Territory</b> One or Multiple

10. Once you have finished filling out the required fields, select the button in the bottom right hand of the screen labeled “**Check Validation**” All validation errors must be fixed before you may request the roles. *Please note: when requesting an additional role, you may be required to update sections of your current roles. These sections will be highlighted by red boxes after you have selected “Check Validation”.*

The screenshot shows the 'MACPro User Role Request' interface. At the top, there are navigation tabs: News, Tasks, Records, Reports, and Actions. The user is logged in as Jane Doe. The form is titled 'MACPro User Role Request' and is for a 'Front Line Manager'. It contains the following sections:

- Summary:** Includes 'First Name' (Katie) and 'Last Name' (Training).
- Current Role(s):** A table with columns: Role, Program, Component, Authority, Office Type, Region, State, Notes/Info, and Title (for Notice). The current role is 'CMS Point of Contact (CPOC)' with Program: Medicaid, Component: State Plan, Authority: All, Office Type: Central Office, Region: All, State: All.
- Add Role(s):** A table with the same columns. The added role is 'CMS Pack' with Program: Medicaid, Component: State Plan, Authority: All, Office Type: Central Off, Region: All, State: N/A. There is a red 'X' in the Title column.

At the bottom right, there are two buttons: 'Check Validation' (highlighted with a red box and a red arrow) and 'Request Roles' (green).

11. If validation is passed, you may select the green button labeled “Request Roles”.

The screenshot shows the 'MACPro User Role Request' interface. At the top, there are navigation tabs: News, Tasks, Records (selected), Reports, and Actions. The user 'Jane Doe' is logged in. The form title is 'MACPro User Role Request' for a 'Front Line Manager'. The user's first name is 'Katie' and last name is 'Training'. Below this, there are sections for 'Current Role(s)' and 'Add Role(s)'. The 'Current Role(s)' section contains a table with columns: Role, Program, Component, Authority, Office Type, Region, State, Notes/Info, and Title (for Notice). The current role is 'CMS Point of Contact (CPOC)' with Program 'Medicaid', Component 'State Plan', Authority 'All', Office Type 'Central Office', Region 'All', and State 'All'. The 'Add Role(s)' section contains a similar table with columns: Role, Program, Component, Authority, Office Type, Region, State, Notes/Info, and Title (for Notice). The role being added is 'CMS Packs' with Program 'Medicaid', Component 'State Plan', Authority 'All', Office Type 'Central Off', Region 'All', and State 'N/A'. At the bottom right, there are three buttons: 'Cancel', 'Check Validation', and 'Request Roles'. A red arrow points to the 'Request Roles' button, which is highlighted with a red box.

Role	Program	Component	Authority	Office Type	Region	State	Notes/Info	Title (for Notice)
CMS Point of Contact (CPOC)	Medicaid	State Plan	All	Central Office	All	All	View/ Edit	

Role	Program	Component	Authority	Office Type	Region	State	Notes/Info	Title (for Notice)
CMS Packs	Medicaid	State Plan	All	Central Off	All	N/A	View/ Edit	X

12. You will receive a message asking if you are sure you want to request these roles. The message also notes that you will not be able to request additional roles until these roles are approved or denied. Select “Yes”.

The dialog box contains the text: 'Are you sure you want to request these roles? You will not be able to request additional roles until these roles are approved/denied.' Below the text are two buttons: 'No' and 'Yes'. The 'Yes' button is highlighted with a red box and a red arrow points to it from the right.

## Approving a Role Request

*Please Note: This function is for the CMS System Administrator, CMS Role Approver, CMS CO Administrator and State System Administrator roles only.*

1. Role approvers will receive a task and email notification when there is a new role request awaiting their approval. At the end of each day, a notification will be sent to all eligible role approvers if there is a request that no one has added to their queue.
2. The role approver will receive an email notification stating that there is a new role request awaiting his/her approval. Access the task using one of the following two options:
  - a. To access the task, the role approver may click on the link in the email.

Hello,

There are new role requests awaiting your approval.

To access the Role Approval action, navigate to the Actions tab in MACPro, or follow the link below:

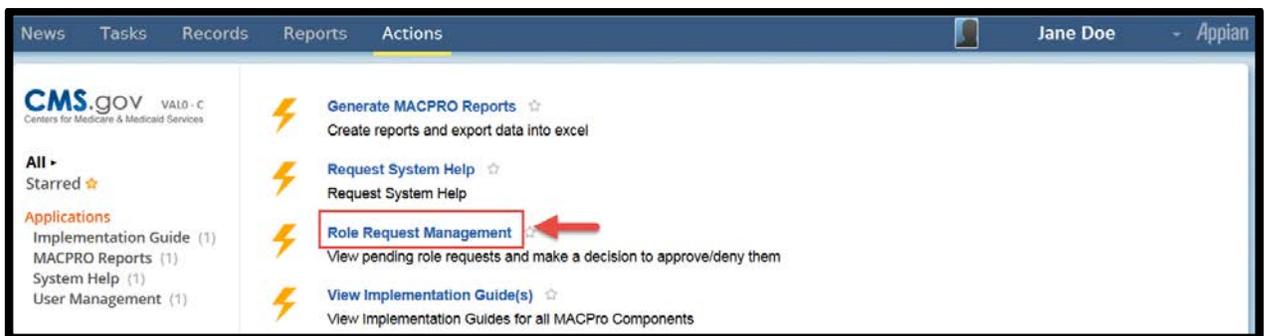
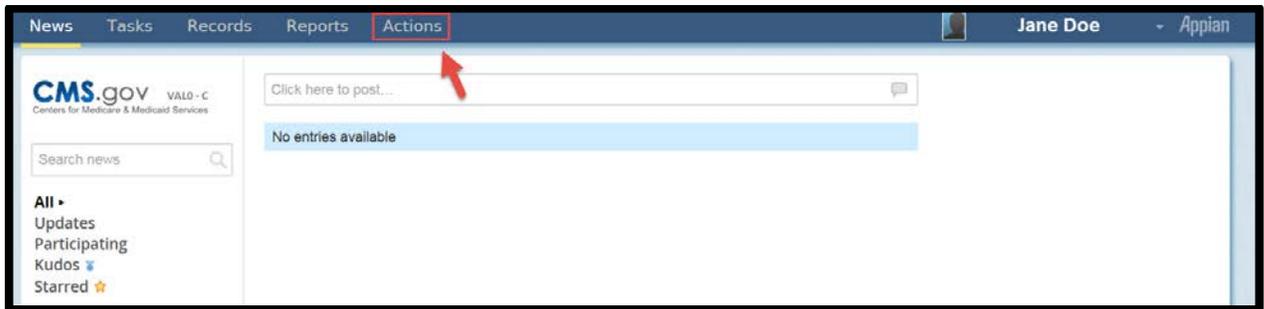
[View Role Requests](#)



If you have questions, please contact the MACPro Help Desk.

[MACPro\\_HelpDesk@cms.hhs.gov](mailto:MACPro_HelpDesk@cms.hhs.gov)

- b. Alternatively, the role approver may access the role request by logging into MACPro and selecting the “**Actions**” tab from the upper toolbar and selecting “**Role Request Management**.”



3. A list of all pending role requests will appear under the “**All Pending Requests**” header. These requests are visible to all eligible role approvers. One role approver has the ability to add requests to their queue and remove them from the general pool. To do this, select the checkbox next to the role request.

**Role Request Management**

Request System Help  
User Profile Search

**My Queue**

You have no role requests in your queue

Return to Group Deny Approve

**All Pending Requests**

<input type="checkbox"/>	Requester ↑	Request Type	Role	Program	Component	Authority	Office Type	Region	State / Territory	Request Date	Notes/Info
<input type="checkbox"/>	John Doe	+	State System Administrator (SSA)	All	All	All	N/A	N/A	Missouri	9/29/2016	View

Refresh Add to My Queue

4. Select the button labeled **“Add to My Queue”**. Once the request is placed in your queue, no other role approver may act on this request.

*Please Note: You will have until midnight the following business day to act on the role request once it is placed in your queue. If you have not acted on a role request that is added to your queue by midnight the following day, it will be returned to the general pool.*

**Role Request Management**

Request System Help  
User Profile Search

**My Queue**

You have no role requests in your queue

**All Pending Requests**

<input type="checkbox"/>	Requester ↑	Request Type	Role	Program	Component	Authority	Office Type	Region	State / Territory	Request Date	Notes/Info
<input checked="" type="checkbox"/>	John Doe	+	State System Administrator (SSA)	All	All	All	N/A	N/A	Missouri	9/29/2016	<a href="#">View</a>

Refresh Add to My Queue

- By selecting the link in the “Notes/Info” column labeled “View/Edit”, the role approver will see notes by the role requestor.

The screenshot shows the 'Role Request Management' page in the CMS.gov system. The user is Jane Doe. The page displays a table titled 'My Queue' with the following columns: Requester, Request Type, Role, Program, Component, Authority, Office Type, Region, State / Territory, Request Date, and Notes/Info. A red arrow points to the 'View/Edit' link in the 'Notes/Info' column for the request from John Doe. Below the table are buttons for 'Return to Group', 'Deny', and 'Approve'.

Requester	Request Type	Role	Program	Component	Authority	Office Type	Region	State / Territory	Request Date	Notes/Info
John Doe	+	State System Administrator (SSA)	All	All	All	N/A	N/A	Missouri	9/29/2016	<a href="#">View/Edit</a>

- Once the request is in your queue, you may enter comments in the “Reviewer Notes” text box.

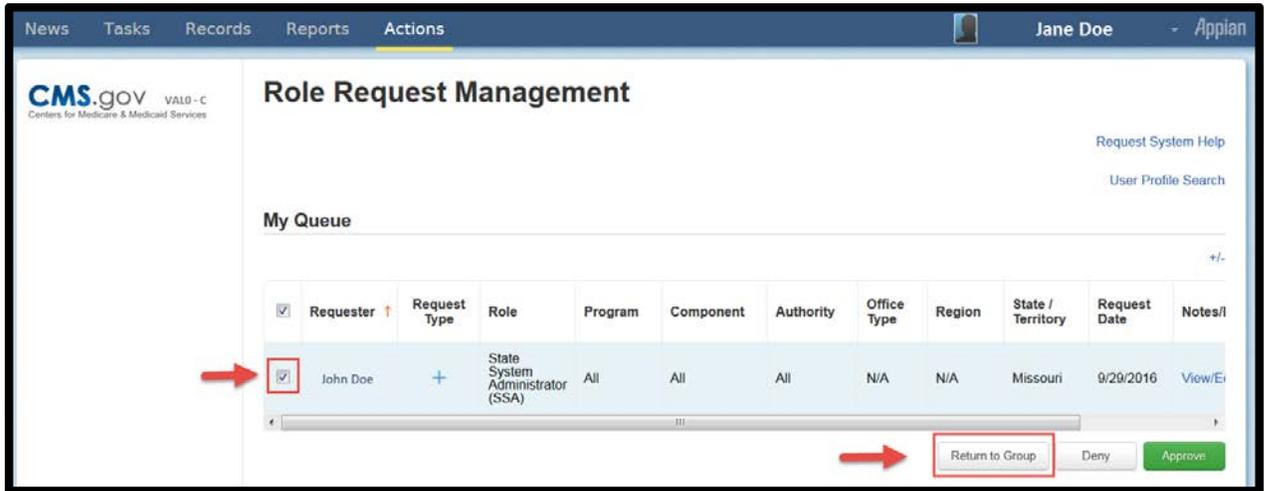
The screenshot shows the 'Role Request Management' page with the 'Reviewer Notes' text box highlighted in red. The text box is empty and has a character count of 0/4000. Below the text box, the role details are displayed:

**Role Name:** State System Administrator (SSA)  
**Requester Notes:** None

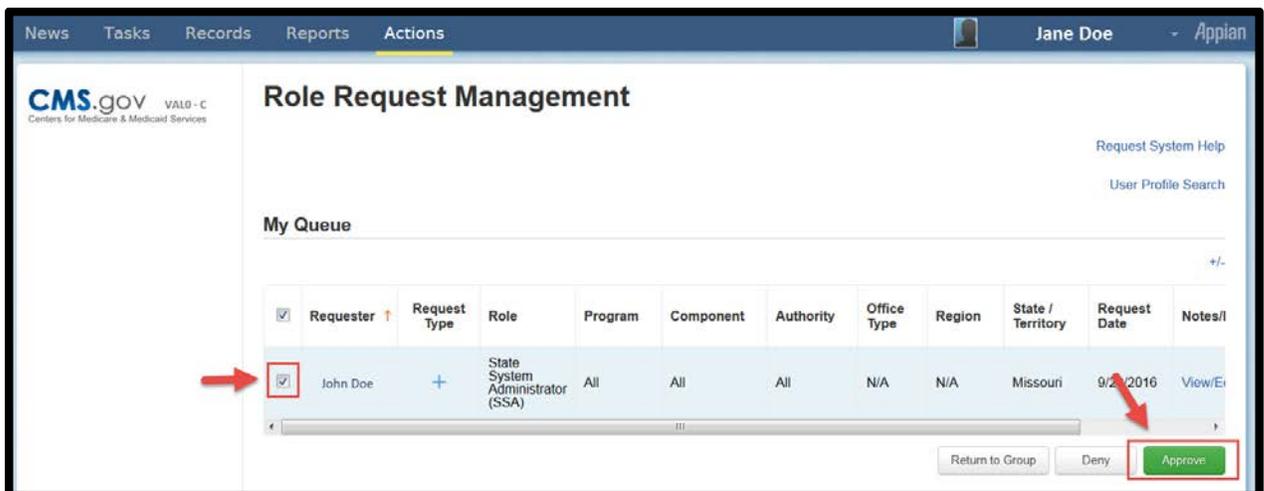
**Role Description:**

- \* Creates and maintains the State Profile
- \* Approves state role requests
- \* Reassigns state tasks to other state users
- \* Disassociates state users from roles
- \* Requests/views all system reports for the state
- \* Maintains MACPro system files, parameters, etc. for the state

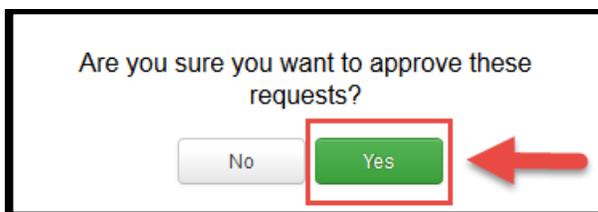
7. If you wish to return the role request back to the general pool, select the checkbox next to the role request and select the button labeled **“Return to Group”**.



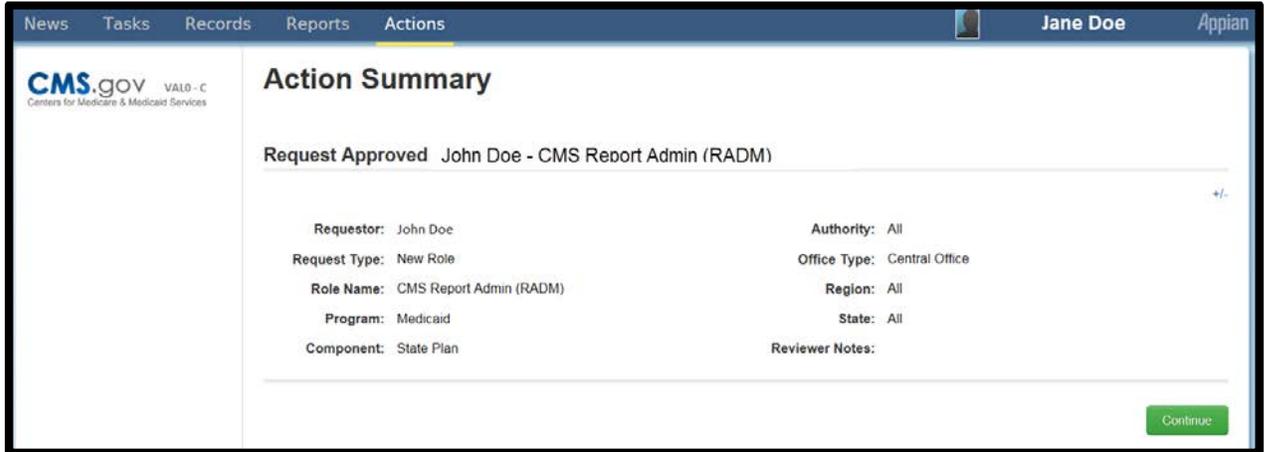
8. To approve the role request, select the checkbox next to the role request and select the green button labeled **“Approve”**.



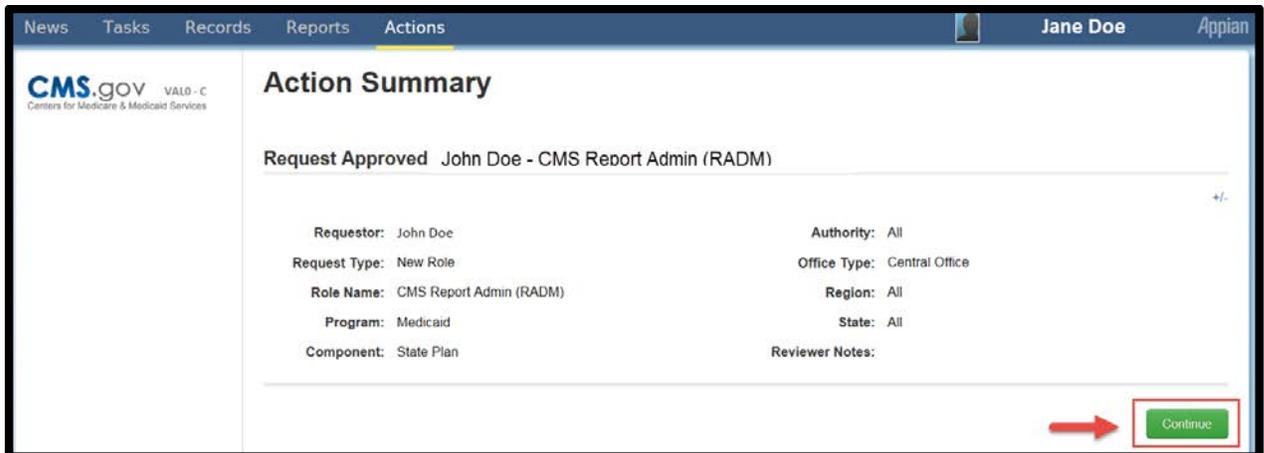
9. A confirmation will then ask **“Are you sure you want to approve these requests?”** Select **“Yes.”**



10. An action summary will appear confirming the request approval.



11. Select the green button labeled “Continue” to return to the Role Request screen.



12. Once the role is approved, an email notification will be sent to the requestor including the approver's notes.

Hello,

Your request for the following role has been Approved:

Request Type: New MACPro Role

Role Name: CMS Submission Review Team Member (SRT)

Program: Medicaid

Component: State Plan

Authority: Health Homes (HHP)

Office Type: Central Office

Region: All

State: All

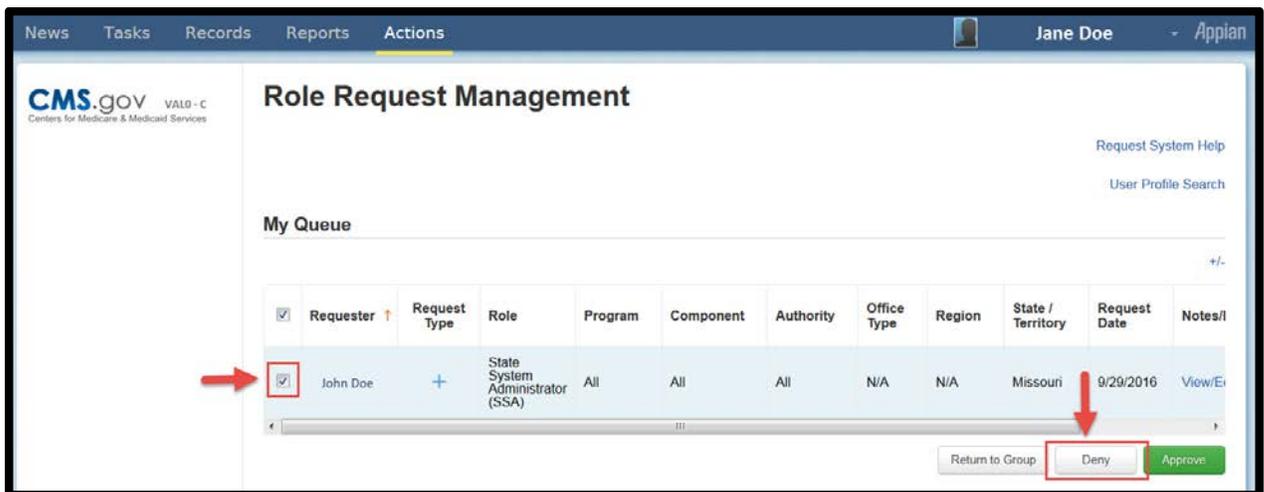
If you have questions, please contact the MACPro Help Desk.

[MACPro\\_HelpDesk@cms.hhs.gov](mailto:MACPro_HelpDesk@cms.hhs.gov)

## Denying a Role Request

*Please Note: This function is for the CMS System Administrator, CMS Role Approver, CMS CO Administrator and State System Administrator roles only.*

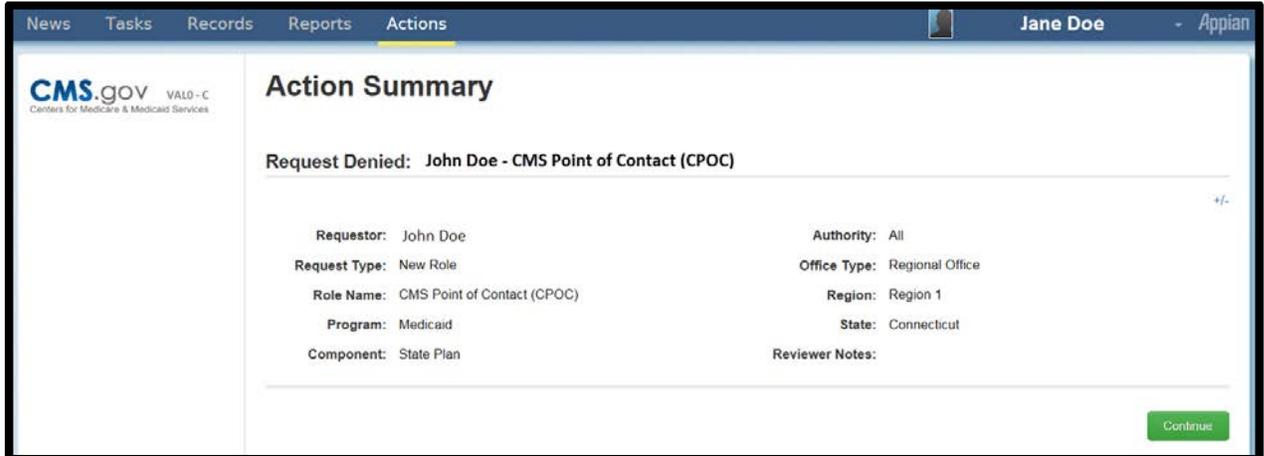
1. Follow steps 1-7 in the [Approving a Role Request](#) section of this guide to view the pending role request and add it to your queue.
2. To deny the role request, select the checkbox next to the role request and select the button labeled “**Deny**”.



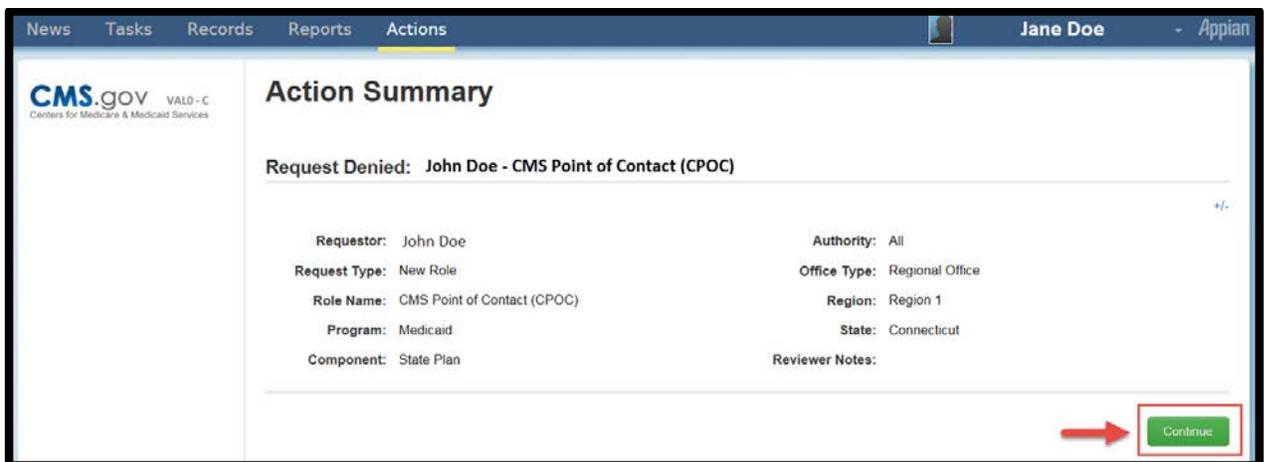
3. A confirmation will then ask “Are you sure you want to deny these requests?” Select “**Yes**.”



- An action summary will appear confirming the request denial.



- Select the green button labeled “**Continue**” to return to the Role Request screen.



6. Once the role is denied, an email notification will be sent to the requestor including the approver's notes.

Hello,

Your request for the following role has been Denied:

Request Type: New MACPro Role

Role Name: CMS Submission Review Team Member (SRT)

Program: Medicaid

Component: State Plan

Authority: Health Homes (HHP)

Office Type: Central Office

Region: All

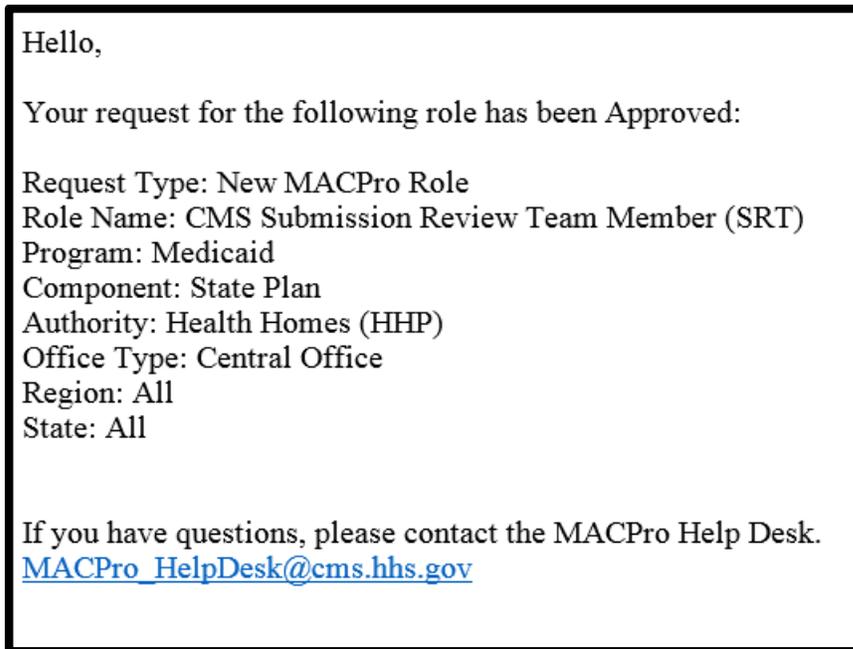
State: All

If you have questions, please contact the MACPro Help Desk.

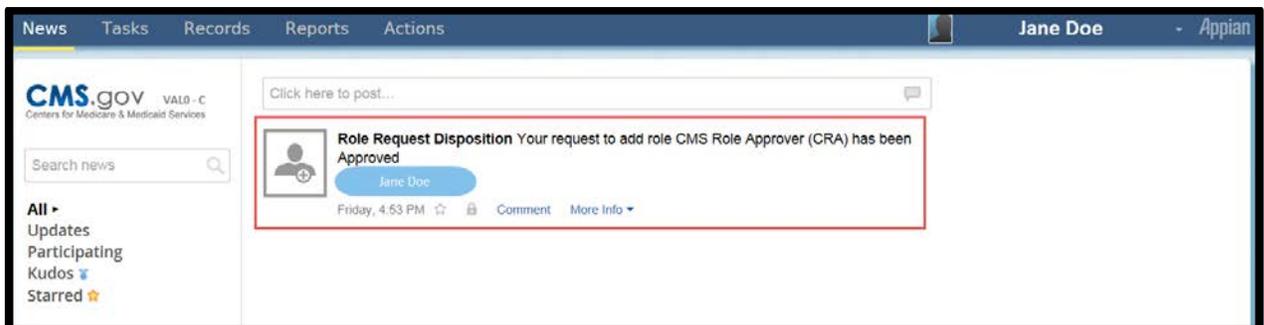
[MACPro\\_HelpDesk@cms.hhs.gov](mailto:MACPro_HelpDesk@cms.hhs.gov)

## Role Requestor Notifications

1. Once a role has been approved or denied, the role requestor will receive an Email notification detailing the role approval/denial.



2. Additionally, upon logging into MACPro, the role requestor will see a story in his/her newsfeed detailing the role approval/denial.



- The new approved role will appear in the User's Profile in the Approved Role(s) table.

Records / My User Profile

**Jane Doe** [Follow](#) [Edit Front Line Manager](#) [Add or Modify Roles](#) [View and Approve Role...](#)

[Request System Help](#)

**Basic Information**

First Name Jane User ID JANEDOE  
 Last Name Doe Email Address [REDACTED]  
 Type of MACPro CMS Staff User Phone Number [REDACTED]  
 User (EIDM Role) Front Line Manager Katie Training

**Approved Roles** [Show Advanced Options](#)

Assigned Role	Program	Component	Authority	Office Type	State / Territory	Approved By	Date Approved
CMS Role Approver (CRA)	Medicaid	State Plan	Health Homes (HHP)	Central Office	N/A	JOHNDOE	9/9/2016 4:53 PM EDT

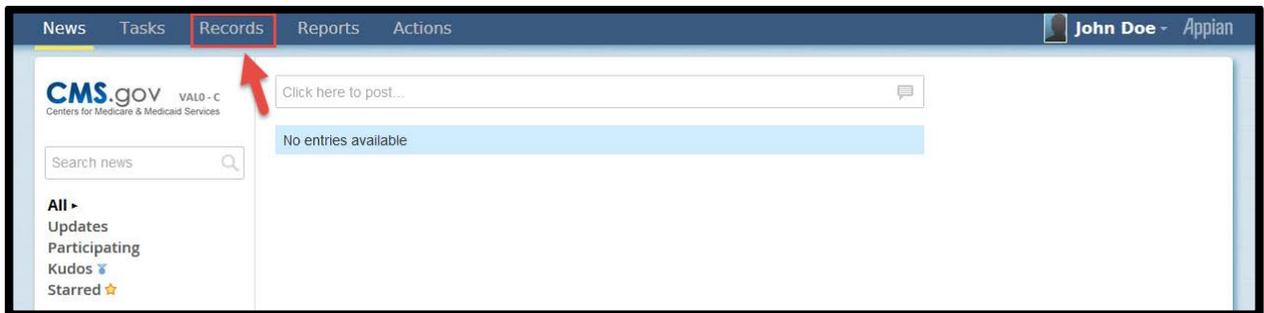
## Viewing Other User's Profiles

*Please Note: This function is for the CMS System Administrator, CMS Role Approver, CMS CO Administrator and State System Administrator roles only.*

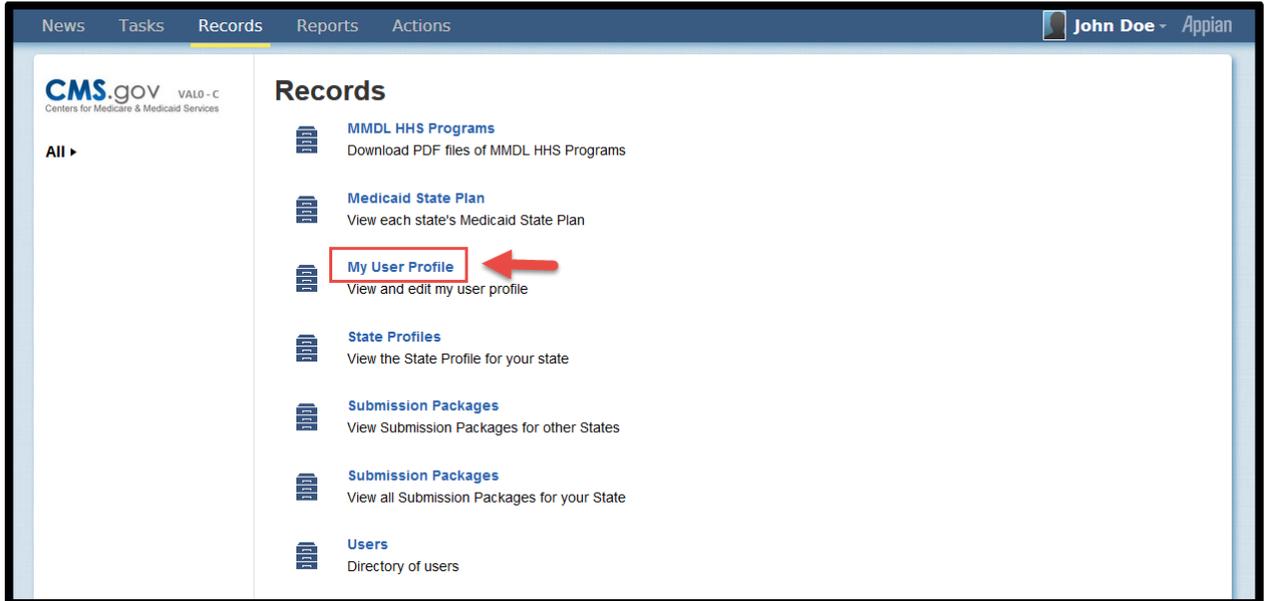
**Table 3: User Profile Visibility**

Role	Has the ability to view CMS User Profiles	Has the ability to view State User Profiles
CMS System Administrator	Yes	Yes
CMS Role Approver	Yes	No
CMS Co Administrator	Yes	No
State System Administrator	No	Yes

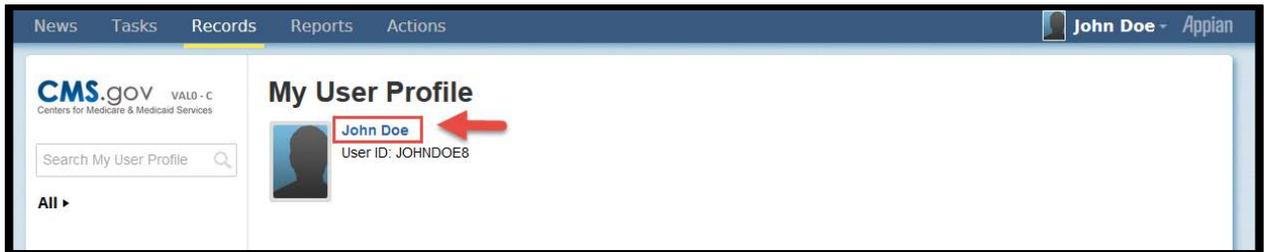
1. Log into MACPro.
2. Select the “**Records**” tab from the upper toolbar.



3. Select "My User Profile".



4. Select your Name.



- From the left hand toolbar, select “User Profile Search”.

Records / My User Profile  
**John Doe** Follow

Add or Modify Roles    Role Request Manage...    Request System Help

**Basic Information**

First Name John    User ID JOHNDOE8  
 Last Name Doe    Email Address [REDACTED]  
 Type of MACPro State User    Primary Phone Number [REDACTED]  
 User (EIDM Role)

**Approved Roles** Show Advanced Options

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved
State System Administrator (SSA)	All	All	All	[REDACTED]	CMSSYSADMIN1	10/14/2016

- There are three different views available: “Filter By User” “Filter By Role” and “View All Users”. In the “Filter By User” view, the user can search for any user in the system by First Name, Username, and Last Name. A list of users matching this search criterion will appear in a table below.

Records / My User Profile  
**John Doe** Follow

Role Request Manage...    Request System Help

**Filter By User** +/-

Filter By User    Filter By Role    View All Users

First Name     Username   
 Last Name

**Users** +/-

No Users Found

**Selected Profile** +/-

No User Selected

- To view a user's information, select the User name in the "Username" column.

Records / My User Profile

**John Doe** [Follow](#)

[Filter By User](#) [Filter By Role](#) [View All Users](#)

**Filter By User**

First Name: Jane Username:

Last Name: Doe

**Users**

Username	First Name	Last Name
JANEDOE	Jane	Doe

**Selected Profile**

No User Selected

- After selecting a user name, the user's Basic Information and Approved Roles will be shown.

**Basic Information**

First Name: Jane User ID: JANEDOE

Last Name: Doe Email Address:

Type of MACPro User (EIDM Role): State User Primary Phone Number:

**Approved Roles**

[Show Advanced Options](#)

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved
State Director (SDIR)	Medicaid	Quality Measure Reporting (QMR)	All	<input type="text"/>	JOHNDOE8	10/14/2016

9. By selecting “**Show Advanced Options**,” you will be able to customize the view of user’s approved roles.

**Basic Information**

First Name	Jane	User ID	JANEDOE
Last Name	Doe	Email Address	[Redacted]
Type of MACPro User (EIDM Role)	State User	Primary Phone Number	[Redacted]

**Approved Roles**

[Show Advanced Options](#)

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved
State Director (SDIR)	Medicaid	Quality Measure Reporting (QMR)	All	[Redacted]	JOHNDOE8	10/14/2016

10. You may check the boxes next to the fields that you wish to show in the Approved Roles table. Available fields are State/Territory, Program, Component, Authority, Region, Office Type, Approved By, Date Approved, Tasks, and Title (for notice).

**Approved Roles**

Show/Hide Columns [Hide Advanced Options](#)

- State / Territory
- Program
- Component
- Authority
- Region
- Office Type
- Approved By
- Date Approved
- Tasks
- Title (for Notice)

- a. If the checkbox next to “**Tasks**” is selected, you will be able to determine if one of the user’s approved roles has any accepted tasks within MACPro.

**Approved Roles**

Show/Hide Columns Hide Advanced Options

- State / Territory
- Program
- Component
- Authority
- Region
- Office Type
- Approved By
- Date Approved
- Tasks**
- Title (for Notice)

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved	Tasks
State Director (SDIR)	Medicaid	Quality Measure Reporting (QMR)	All		JOHNDOE8	10/14/2016	View Accepted Tasks

- b. By selecting the link to “**View Accepted Tasks**,” a list of accepted tasks for that user’s role will be shown below the Approved Roles table.

**Approved Roles**

Show/Hide Columns Hide Advanced Options

- State / Territory
- Program
- Component
- Authority
- Region
- Office Type
- Approved By
- Date Approved
- Tasks**
- Title (for Notice)

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved	Tasks
State Director (SDIR)	Medicaid	Quality Measure Reporting (QMR)	All		JOHNDOE8	10/14/2016	Hide Accepted Tasks

**Tasks**

- Review & Certify Report: [Redacted]

- c. To hide the list of approved tasks, select the link to “**Hide Accepted Tasks**” in the Tasks column.

**Approved Roles**

Show/Hide Columns Hide Advanced Options

- State / Territory
- Program
- Component
- Authority
- Region
- Office Type
- Approved By
- Date Approved
- Tasks
- Title (for Notice)

Role	Program	Component	Authority	State / Territory	Approved By	Date Approved	Tasks
State Director (SDIR)	Medicaid	Quality Measure Reporting (QMR)	All		JOHNDOE8	10/14/2016	Hide Accepted Tasks

Tasks

- Review & Certify Report:

11. By selecting the “**Filter By Role**” view, you may filter by EIDM Role using the drop down box.

News Tasks **Records** Reports Actions John Doe - Appian

CMS.gov VALO - C  
Centers for Medicare & Medicaid Services

Records / My User Profile  
**John Doe** Follow

Filter By User **Filter By Role** View All Users

**Filter By Role**

EIDM Role Name

State User

All data in the grid must be cleared before changing EIDM Role Name

12. You may also filter by Program, Component, Authority, Office Type, Region, or State. A list of users matching this search criterion will appear in a table below.

The screenshot shows the 'Records / My User Profile' page for John Doe. The 'Filter By Role' section is active, with the 'EIDM Role Name' dropdown set to 'State User'. Below this, a table of filters is shown with the following values: Role: State Director, Program: Medicaid, Component: Quality Measu, Authority: All, Office Type: N/A, Region: N/A, State / Territory: Missouri. A 'View' link is present next to the State / Territory filter. Below the filters, the 'Users' table is displayed with the following data:

Username	First Name	Last Name
JANEDOE	Jane	Doe

13. By selecting the “View All Users” view, a table will be show all users that you are allowed to view.

The screenshot shows the same 'Records / My User Profile' page for John Doe. The 'View All Users' button is highlighted with a red box and a red arrow pointing to it. Below the filters, the 'Users' table is displayed with the following data:

Username	First Name	Last Name
JOHNDOE8	John	Doe
JANEDOE	Jane	Doe