

(FOR INTERNAL USE ONLY)

Administrative Guide for Web Content Management

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Table of Contents

1. Introduction	8
1.1 Getting Access to Percussion	8
1.2 PBEGWeb Resource Box	8
2. Overview	9
2.1 Contributing Editor (CE)	10
2.2 Section Editor (SCE)	10
2.3 Senior Editor (SE)	10
2.4 Exclusive to WNMG	10
3. CMS.gov	11
3.1 Login for CMS.gov	11
3.2 Create a Section Page	12
3.3 Update a Section Page	13
3.3.1 Adding Downloads or Related Links to a Page	16
3.3.2 Removing Downloads or Related Links from a Page	21
3.4 Create a Download	23
3.5 Update a Download	25
3.6 Other Content Types	27
3.6.1 Create or Update an Image File	27
3.6.2 Create or Update an External Link	31
3.7 Create a Dynamic List Item	35
3.8 Update a Dynamic List item	38
3.9 Update a Center Page List Widget	39
3.10 Create a List Widget	40
3.11 Promote a Previous Version of a Content Item	43
3.12 Archive a Content Item	45
3.13 Revive or Republish an Archived Item	45
3.14 Check for Associated Content	46
3.15 Update a Navon	48
3.16 Special Processing	50
3.16.1 AMA/UB-04 or AHA Agreement/License Link	50
3.16.2 MLN Matters Articles and Special Edition Articles	51
3.16.2.1 New Special Edition	52
3.16.2.2 New MLN Matters	52
3.16.2.3 Revised MLN Matters & Special Edition Articles	53
3.16.3 Federal Regulations	53
3.16.4 MLN Connects	56
3.16.5 Spotlight or Blue Box	60
3.16.6 HTML Files	60
3.16.6.1 New HTML Files	60
3.16.6.2 Revised HTML Files	61

3.16.7	Performance Data.....	62
3.17	Top Navigation	63
3.17.1	CMS Sub Site Page.....	63
3.17.2	CMS Sub Site Top Nav.....	63
3.17.3	CMS Sub Site Top Nav Item.....	64
3.17.3.1	Establishing an automatic redirect using HTML.....	65
3.17.4	List Widget.....	66
4.	CMSnet	66
4.1	Login for CMSnet	67
4.2	Service Page.....	68
4.3	Downloads, External Links, Images and List Widgets.....	68
4.4	Promote a Previous Version.....	69
4.5	Archive or Revive Content items in CMSnet	69
4.6	Update a Navon in CMSnet.....	69
4.7	Other Content Types.....	69
4.8	Internal Standards for CMSnet.....	69
4.9	Special Processing.....	70
4.9.1	Adding or Updating MP4 Videos.....	70
4.9.2	Adding or updating You Tube videos.....	73
4.9.3	AMA-ADA-AHA Medical Codes	73
5.	JIRA.....	74
5.1	Request for File Uploads.....	74
5.2	Request for High Priority Posting(s)	75
5.3	Requests for New Sections/Center Pages/Dynamic List definition	77
5.4	Viewing Existing Requests in JIRA	77
6.	Self-Audits.....	78
7.	Publishing Schedule.....	79
8.	Section 508 Compliance.....	80
8.1	508 compliance guidelines for downloads.....	80
8.2	508 compliance checklist	81
9.	Additional Resources	82
9.1	Update a Dynamic List Definition	82
10.	Website Statistics	83
11.	Troubleshooting Tips	83
11.1	Text is duplicated multiple times on a page.....	83
11.2	Caching Issue on CMS.gov or CMSnet.....	84
11.3	AMA or AHA Agreement not working	84
11.4	Content Item is locked for Editing.....	84

11.5	File is too large for Percussion	84
11.6	Dynamic List Item not rendering.....	85
11.7	Dynamic List Item / Java Issues.....	85
11.8	Dynamic List Item / Non-Java Issues	87
11.9	Item not showing up in Impact Analysis	87
11.10	CMSnet Right Navigation Issue	87
11.11	CMSnet Video Issue	87
11.12	Calendar feature not working	88
11.13	PDF not displaying for non-IE browser.....	88
11.14	Removing 'Ghost' files	89
11.15	Return to List Not Working	89
12.	Search Tips	90
12.1	Simple Search.....	90
12.2	Advanced Search	91
12.3	External Links.....	93
13.	DPCT Percussion SMEs	94
14.	Appendix A.....	95
14.1	Google Analytics	95
14.1.1	MLN – Tracking HTML Products.....	98
14.1.2	Updating the Monthly “CMS at a Glance” Report.....	99

List of Tables and Figures

Figure 1: PBEGWeb Mailbox	9
Table 1: Steps to turn off 'mark as read' when using Reading Pane.....	9
Table 2: Login steps for CMS.gov	11
Figure 2: CMS.gov Login screen	12
Table 3: Steps to create a new Section Page	12
Table 4: Steps to update a Section Page	14
Figure 3: Percussion folder structure and content.....	15
Figure 4: Workflow Pop-up box	16
Table 5a: Steps to add a Download or Related Link to a page	16
Table 5b: Steps to add a Download or Related Link to the Body field.....	18
Figure 5a: Sites tab	20
Figure 5b: Search tab.....	20
Figure 5c: Search results	21
Table 6: Steps to remove Downloads or Related Links from a page.....	21
Figure 6: Active Assembly Table Editor.....	23
Table 7: Steps to create a new download	23
Figure 7: New Download content window	25
Table 8: Steps to Update a Download.....	25
Figure 8: Update a download content window.....	27
Table 9a: Steps for creating an Image File.....	27
Table 9b: Steps for updating an Image File.....	29
Figure 9a: New Image content window	30
Figure 9b: Completed Image content window	31
Table 10a: Steps for creating an External Link.....	31
Table 10b: Steps for updating an External Link.....	32
Figure 10a: New CMS External Link content window.....	34

Figure 10b: Completed CMS External Link content window.....	34
Table 11a: Steps to create a Dynamic List Item.....	35
Figure 11: Dynamic List Section Page	36
Figure 12a: New Dynamic List Item (pre-selection).....	37
Figure 12b: New Dynamic List Item (post selection)	37
Table 11b: Steps to update a Dynamic List Item.....	38
Table 12: Steps to update a Center Page List Widget.....	39
Table 13: Steps to create a List Widget.....	40
Figure 13: List Widget content Window	42
Figure 14: Center page – Active Assembly Table Editor content window	43
Table 14: Steps to promote a previous version	43
Figure 15: Promote a previous version.....	44
Table 15: Steps for Archiving a Content Item.....	45
Table 16: Steps to revive or republish a previously archived item.....	46
Table 17: Steps to check for associated content.....	47
Figure 16a: Example of a Download item associated with a Dynamic List.....	47
Figure 16b: Example of a Download item that is NOT associated with another content item.....	48
Table 18: Steps for updating a Navon for a new Section Page	48
Figure 17: Navon – Active Assembly Table Editor content window.....	50
Figure 18: AMA License (external link) example	51
Figure 19: Impact Analysis pop-up box	53
Table 19: Steps for adding the weekly MLN Connects Newsletter	57
Table 20: Update Performance Data.....	62
Figure 20: CMS Sub Site Top Nav	64
Figure 21: CMS Sub Site Top Nav Item	65
Table 21: Differences between CMSnet and CMS.gov Workflow	66
Table 22: Login steps for CMSnet.....	67

Figure 22: CMSnet Login screen.....	68
Table 23: 508 Standards for CMSnet.....	69
Table 24: Steps for adding or updating .mp4 videos	70
Table 24: JIRA Create Ticket suggestions	75
Figure 23a: JIRA Form login page	77
Figure 23b: JIRA Form selection page.....	78
Table 25: Steps to perform a Self-Audit	78
Figure 24: Percussion “Views” folder.....	79
Table 26: Steps to update a Dynamic List definition	82
Figure 25: File size restriction	85
Figure 26: Dynamic List Item/Java Issue.....	87
Figure 27: PDF error message.....	89
Figure 28: Dynamic List Item Navon	90
Figure 29a: Simple Search box	91
Figure 29b: Simple Search results	91
Figure 30a: Advanced Search box	92
Figure 30b: Advanced Search results	93
Table 27: DPCT SME contact list.....	94
Figure 31a: Google Analytics Top Events page	97
Figure 31b: Google Analytics Top Events page	98

1. Introduction

This document is intended for internal CMS use only. This document is written specifically for the Provider Communications Group (PCG), Division of Provider Communications Technology (DPCT) web team and may contain some conflicting information with the information provided by the Web and New Media Group (WNMG) as our web team staff has additional rights that other Contributing Editors and/or Section Editors do not have. The instructions provided in this document are specific to the Percussion web content management system.

1.1 Getting Access to Percussion

To gain access to Percussion, you will need to:

- Request that the “Percussion_User” job code is added to your EUA profile,
- Attend Percussion training, and
- Submit a CMS Web Help Desk ticket (JIRA) to have your Percussion account created

Specific detail on how to obtain Percussion access and training information is available on the [OC Intranet page](#).

Once you have obtained access to Percussion for CMS.gov, you can request that your account also have permission to access CMSnet by submitting a CMS Web Help Desk ticket, also known as [JIRA](#).

1.2 PBEGWeb Resource Box

DPCT uses an email resource box called PBEGWeb to manage the web requests submitted by other components. If you need access to the resource box, please contact the Action Desk at x62580 to request it. The email address for PBEGWeb is PBEGWeb@cms.hhs.gov.

New requests come into the “Inbox” folder and are processed in the order in which they are received. Items that are not being worked on have a closed envelope icon next to them. If you are working on an item, double-click on the email to open the message which will change the icon to an open envelope. Once you are finished with the request, send an email back to the requestor letting them know that their item has been completed, and move the original email to the “Active” folder containing your name (See [Figure 1](#)). If you see an open item with a “red flag”, that means someone from the team is already working on this request.

If you receive a request that is not documented in this guide, please contact the DPCT SMEs for assistance (See [Section 12](#)).

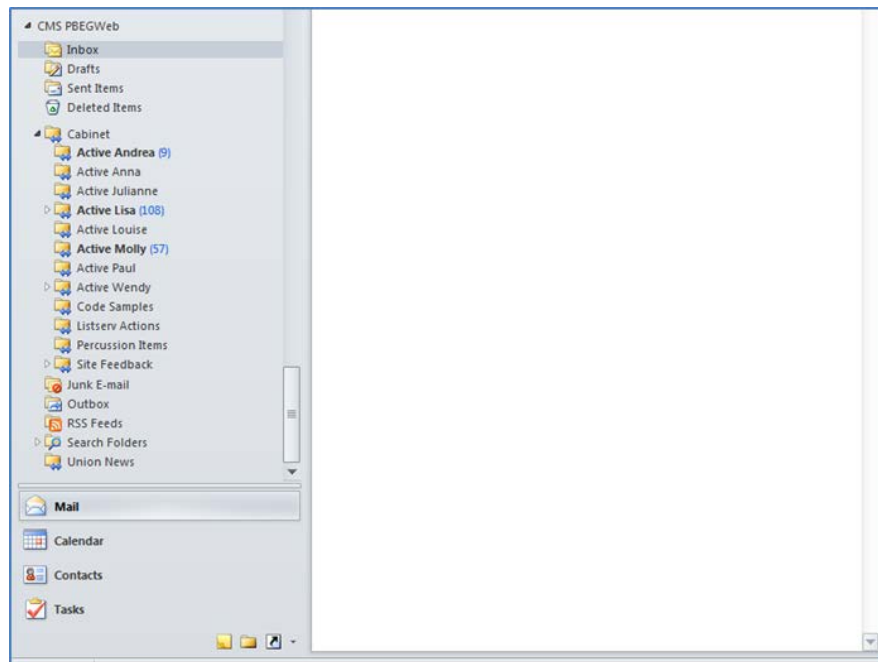


Figure 1: PBEGWeb Mailbox

If you are using Reading Pane, by default Microsoft Outlook will automatically “mark as read” any emails that you view in the reading pane. In order to turn off this feature, follow the steps outlined below:

Table 1: Steps to turn off ‘mark as read’ when using Reading Pane

Step #	Description
1	Select the “File” tab in Microsoft Outlook.
2	Double-click on “Options” located in the left menu bar.
3	When the “Outlook Options” window appears, click on “Mail” in the left menu.
4	Under “Outlook panes”, click on the “Reading Pane...” button.
5	When the “Reading Pane” window appears, remove the checkboxes next to “Mark items as read when viewed in the Reading Pane” and “Mark item as read when selection changes”.
6	Click the “OK” button to accept the changes.
7	Click the “OK” button to close the “Outlook Options” window.

2. Overview

The instructions provided in this document are divided by User Type (Contributing Editor and/or Section Editor) and Web Domain (CMS.gov or CMSnet). It is intended to supplement your

basic Percussion training and may contain information that is specific to pages maintained either on CMS.gov or CMSnet by the DPCT web team.

A description of the user privileges assigned to a Contributing Editor, Section Editor and Senior Editor are provided below and applies to both CMS.gov and CMSnet within Percussion. The terminology used for the same function may differ between CMS.gov and CMSnet and will be explained in this document.

Although the DPCT web team may have additional elevated privileges within Percussion, some functions can only be performed by the WNMG team and will be identified and explained as it pertains to each task identified below.

2.1 Contributing Editor (CE)

Users with Contributing Editor rights have the ability to perform the following tasks:

- Create or Update a Section Page
- Create or Update a Download
- Create or Update Other Content Types (ie: External Links and Images)
- Create or Update a Dynamic List Item
- Create or Update a List Widget
- Update a Navon
- Update a Center Page
- Submit a Section Page, Download, Other Content Types, Dynamic List, List Widget or Navon Item for Approval
- Submit an item for Archiving
- Publish a Previous Version of a Content Item

2.2 Section Editor (SCE)

Users with Section Editor rights are the final approver for specific pieces of content before pages are posted to the live website. Section Editors have the same abilities as Contributing Editors with the additional rights to perform the following tasks:

- Approve or Reject, new or updates to Section Pages, Downloads, Dynamic List Items, Archive Items, List Widgets and Navons
- Approve a Center Page to Senior Editor Level
- Approve Other Content Types (ie: External Links and Images) to Senior Editor Level

2.3 Senior Editor (SE)

Users with Senior Editor rights have the same abilities as Section Editors with the additional ability to edit and/or approve the following content items:

- Approve Other Content Types (ie: External Links and Images)
- Approve Center Pages

2.4 Exclusive to WNMG

The following tasks can only be performed by team members within WNMG. Instructions on how to submit requests for these tasks and general inquiries to WNMG are provided in [Section 5](#).

- Create a new section on CMS.gov

- Create a new Center page
- Create a new Navon
- Define a new Dynamic List*
- Upload a large file to the multimedia server (over 20MB).

*DPCT Section Editors also have elevated rights to define a new Dynamic List.

3. CMS.gov

3.1 Login for CMS.gov

This section outlines the Percussion login procedure for maintaining pages in CMS.gov. The screenshot and login steps are provided below.

Table 2: Login steps for CMS.gov

Step #	Description
1	To access Percussion, go to the following URL: https://wcms.cms.gov:9009/
2	Under “Rhythmyx Application hosted on JBoss” on the left hand side, click “Content Exporer” (See Figure 2). It should default to CMS.Gov.
3	<p>Log in to Percussion with your user name and password.</p> <p><i>Note: Your user name is your work email address. Your password is your network password.</i></p> <p><i>If you also had an IACS account, you will need to use the same password as your IACS account and not your network password.</i></p>

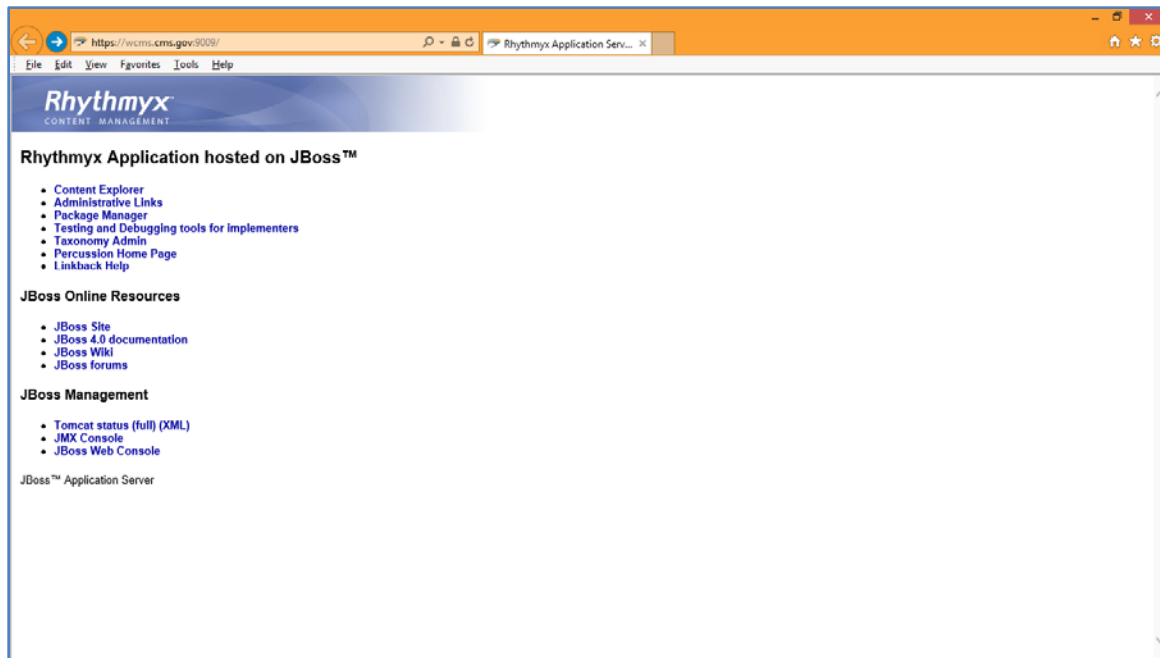


Figure 2: CMS.gov Login screen

3.2 Create a Section Page

The Section Page content type is used to create most web pages on CMS.gov. The table below outlines the procedure for creating a new Section page. This includes submitting the page for approval to the Section Editor if you are the Contributing Editor. If you are also the Section Editor, you may continue the process to approve the page to a “public” state as well.

Table 3: Steps to create a new Section Page

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS</i> - The content items will appear to the right of the screen (See Figure 3).
2	Right-click on the folder where you want to create the new content item and select New Item > Section Page .
3	The Section Page content type form opens. Asterisks indicate required fields—you cannot save the item if these are blank.
4	In “System Title,” enter a unique file name which will form the URL. Do not include spaces or special characters (such as !@#\$\$%^&*~+=\). Use dashes (-) instead of spaces or underscores between words.
5	In “Title,” enter the title you want to display on the page.

Step #	Description
6	Click in the “ <i>Body</i> ” field to add content to the page.
7	In “ <i>Description</i> ,” include a summary that describes the content of the page.
8	In “ <i>Keywords</i> ,” enter a list of the most important keywords and phrases separated with commas. This is sometimes provided on the web request form.
9	To save the content item, click <i>Insert</i> . This will create the page and put it in a “Draft” state. Note: You will not see the “Related Content” (downloads, related links, etc.) field until after you <i>Insert</i> this new page.
10	Click <i>Close</i> to exit the web form window.
11	Right click the new section page and go to <i>Workflow > Check-in</i> to check the section page in.
12	A pop-up window will appear. It is optional to enter a note here if needed. Click “OK”.
13	Right click the new section page and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
14	(Optional) Enter a description in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the section page that was edited to send to the Section Editor.</i>
15	Click <i>Submit</i> . This will put the Section Page in a “Section Editor Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
16	Section Editors: For those users who also have Section Editor rights, you may also approve the Section Page to a “public” state. To approved the page to public: Right click the section page and select <i>Workflow > Direct to Public</i> . Enter Workflow Comments (optional) in the top field. Click <i>Direct to Public</i> .
17	Section Editors: After the page has been pushed to a “public” state; Section Editors must also add the new Section Page to the Navon in order for the new page to reflect in the left navigation menu. Please see Section 3.14 on how to update a Navon.

3.3 Update a Section Page

The table below outlines the procedure for updating an existing Section page. This includes submitting the page for approval to the Section Editor if you are the Contributing Editor. If you

are also the Section Editor, you may continue the process to approve the page to a “public” state as well.

Table 4: Steps to update a Section Page

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS</i> - The content items will appear to the right of the screen (See Figure 3).
2	Right click the section page that is being edited and select <i>Workflow > Quick Edit</i> . A pop-up window will appear (See Figure 4).
3	(Optional) Enter a basic description of what will be updated and who requested the update in the Workflow Comments box in the pop-up window.
4	Click <i>Quick Edit</i> . This will put the item in a “Quick Edit” state and bring you back to the main content/section page. The “State” column will change to Quick Edit.
5	Right click the section page again and select <i>Edit</i> . The Edit Content window will open. Note: <i>If the section page is not in Quick Edit mode, then the Edit menu option will not appear.</i>
6	Click on the field that is going to be updated.
7	Update the content as necessary.
8	Enter information into the Description and Keywords fields if blank. Note: <i>If this is the first time updating this section page, both fields will be blank and will need to be entered or Percussion will generate an error message.</i>
9	Click the <i>Update</i> button at the bottom.
10	After the update has completed. Click the <i>Close</i> button.
11	Right click the section page and go to <i>Workflow > Check-in</i> to check the section page back in. Important Note: It is strongly encouraged to always check content back into Percussion; otherwise you will have exclusive rights to this content item and no one else will be able to access the item. (See Section 6.0 on how to check to see if you have any items checked out exclusively by you.)
12	A pop-up window will appear. If not already done, enter a note that describes the updates made to the section page and click OK.
13	(Optional / Recommended) To preview your changes, right click the section page and select <i>CMS Preview > Section Page</i> . A new webpage will open that looks like the section page that was just updated. If additional changes need to be made, repeat steps 4 – 12. If no additional changes, proceed to step 14.

Step #	Description
14	Right click the section page and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
15	<p>(Recommended) Enter a description of the change in the top field.</p> <p>(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.</p> <p>Note: <i>If no email address is entered, make note of the Content ID number for the section page that was edited to send to the Section Editor.</i></p>
16	Click <i>Submit</i> . This will put the Section Page in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
17	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the Section Page to a “public” state. To approved the page to public:</p> <p>Right click the section page and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i>.</p>

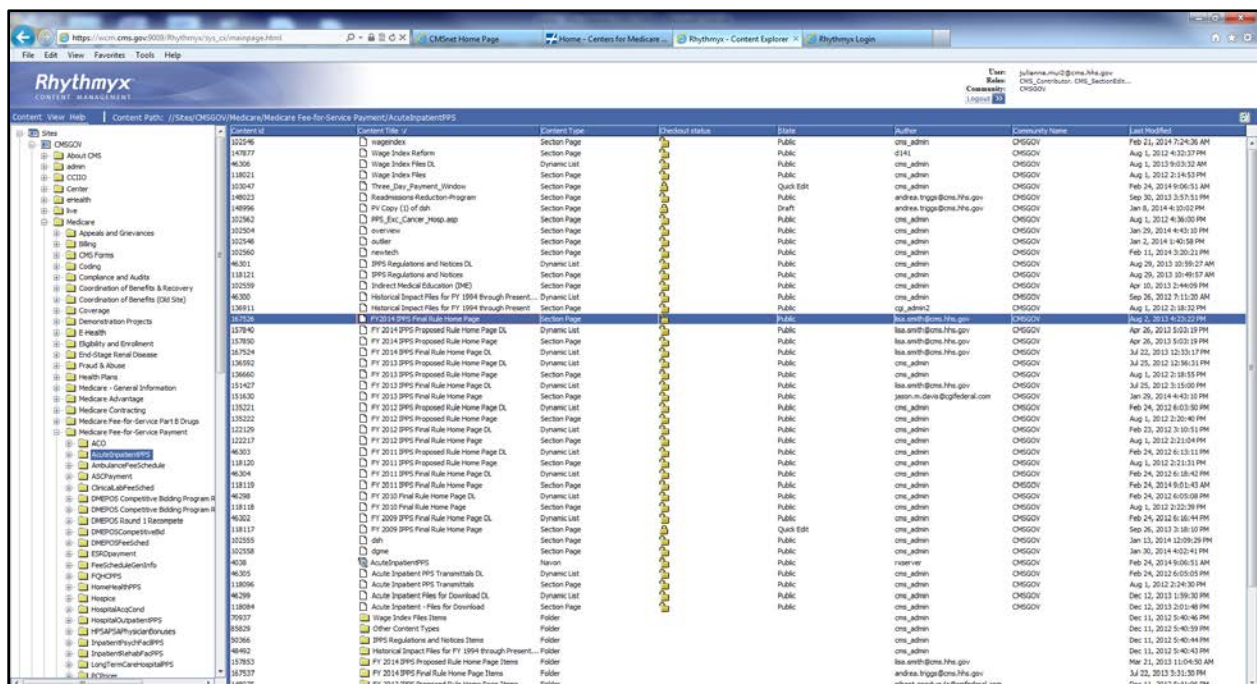


Figure 3: Percussion folder structure and content



Figure 4: Workflow Pop-up box

3.3.1 Adding Downloads or Related Links to a Page

This subsection outlines the steps for adding downloads to the *Downloads* section of any page and to the Body of any page. The download item has to be created and approved to public prior to adding it as a link. If the download item has not been created, refer to [Section 3.4](#) to create the download item first.

The steps for adding **Related Links** is the same as the steps for adding Downloads. The main difference is you will need to click on **CMS_Related_Links** instead of **CMS_Downloads** to add the link. Related Links will only allow internal or external links to be added. You cannot add a “Download” to the Related Links section. The same is true for the “Downloads” section; you can only add download items to the Download Section. If the external link has not been created, refer to [Section 3.6.2](#) to create the external link first before attempting to add it to the Related Links section of the page.

The table below outlines the steps for adding a download item to the Downloads section of any page and can also be used to add items to the Related Links section of any page.

Table 5a: Steps to add a Download or Related Link to a page

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS The content items will appear to the right of the screen.
2	Right click the content item where the download or related link is being added and select <i>Workflow > Quick Edit</i> . A pop-up window will appear.
3	(Optional) Enter a basic description of what will be updated and who requested the update in the Workflow Comments box in the pop-up window.
4	Click <i>Quick Edit</i> . This will put the item in a “Quick Edit” state and bring you back to the main content page. The “State” column will change to “Quick Edit”.

Step #	Description
5	<p>Right click the content item again and select Active Assembly Table Editor (AATE) and the AATE window will open.</p> <p>Note: <i>If the item was not put in to Quick Edit mode, then the AATE menu item will not be visible.</i></p>
6	<p>For Download items:</p> <p>Click on <i>CMS_Downloads</i> to open the Content Browser window.</p> <p>For Related Link items:</p> <p>Click on <i>CMS_Related_Links</i> to open the Content Browser window.</p> <p>For reference, see Figure 6.</p>
7	<p>You can either navigate to the folder where the item is stored or perform a search for the item.</p> <p>To Navigate:</p> <p>On the “Sites” tab, navigate to the Downloads or Other Content Types folder in the destination folder where the item is stored. (See Figure 5a)</p> <p>Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS > Downloads</i></p> <p>To Search:</p> <p>Click on the “Search” tab and enter a part of the file name you are looking for followed by an asterisk (*). Partial filename searches are best if you do not know the exact name of the file. The asterisk tells the search to find filenames that begin with what you entered but can be any combination of letters or numbers after it. (See Figure 5b)</p> <p>Click <i>Search</i>. A list of search results will display. (See Figure 5c)</p> <p>Example: “homehealth*”</p>
8	<p>Click on the item being uploaded and click <i>Select</i>.</p> <p>The Content Browser will close and the new item should appear in the <i>CMS_Downloads</i> or <i>CMS_Related_Links</i> section of the AATE, depending on which section you chose.</p>
9	Click the <i>Close</i> button.
10	<p>Right click the content item and go to <i>Workflow > Check-in</i> to check the item back in.</p> <p>Important Note: It is strongly encouraged to always check content back into Percussion; otherwise you will have exclusive rights to this content item and no one else will be able to access the item. (See Section 6.0 on how to check to see if you have any items checked out exclusively by you.)</p>
11	A pop-up window will appear. Enter a note that describes the updates made to the content item and click OK.
12	<p>(Optional / Recommended) To preview your changes, right click the content item and select <i>CMS Preview > [Content name]</i>. A new webpage will open that looks like the page that was just updated. If additional changes need to be made, repeat steps 4 – 11. If no additional changes, proceed to step 13.</p>

Step #	Description
13	Right click the content item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
14	<p>(Recommended) Enter a description of the change in the top field.</p> <p>(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.</p> <p>Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.</i></p>
15	Click <i>Submit</i> . This will put the item in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
16	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the content item to a “public” state. To approved the item to public:</p> <p>Right click the item and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i>.</p>

The table below outlines the steps for adding a download or related link item to the Body section of any page.

Table 5b: Steps to add a Download or Related Link to the Body field

Step #	Description
1	<p>Navigate to the appropriate folder on the left hand menu:</p> <p>Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS</i></p> <p>The content items will appear to the right of the screen.</p>
2	Right click the content item where the link is being added and select <i>Workflow > Quick Edit</i> . A pop-up window will appear.
3	(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window.
4	<p>Click <i>Quick Edit</i>.</p> <p>This will put the item in a “Quick Edit” state and bring you back to the main content page. The “State” column will change to Quick Edit.</p>
5	To add a download or related link to the body of the page, go to the <i>Body</i> field. Place your cursor where the link is to be inserted. Go to <i>Insert -> Inline Template or Inline Link</i> (whichever is appropriate). Drill down to the appropriate folder (Downloads or Other Content Types) or do a <i>Search</i> . Click on the appropriate file. In the Template Preview tab, the link

Step #	Description
	<p>Title should appear (Downloads will include the file size, Related Links will not). Click <i>Select</i>. The file will appear with two carrots around the link title.</p> <p>Example: ► General Explanation of the Major Categories [PDF, 53KB] ◀</p>
6	Click the <i>Update</i> button at the bottom.
7	After the update has completed. Click the <i>Close</i> button.
8	<p>Right click the item and go to <i>Workflow > Check-in</i> to check the item back in.</p> <p>Important Note: It is strongly encouraged to always check content back into Percussion; otherwise you will have exclusive rights to this content item and no one else will be able to access the item. (See Section 6.0 on how to check to see if you have any items checked out exclusively by you.)</p>
9	A pop-up window will appear. Enter a note that describes the updates made to the content item and click <i>OK</i> .
10	(Optional / Recommended) To preview your changes, right click the item and select <i>CMS Preview > [Content Name]</i> . A new webpage will open that looks like the page that was just updated. If additional changes need to be made, repeat steps 4 – 9. If no additional changes, proceed to step 11.
11	Right click the section page and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
12	<p>(Recommended) Enter a description of the change in the top field.</p> <p>(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.</p> <p>Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.</i></p>
13	Click <i>Submit</i> . This will put the item in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
14	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public:</p> <p>Right click the content item and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i>.</p>

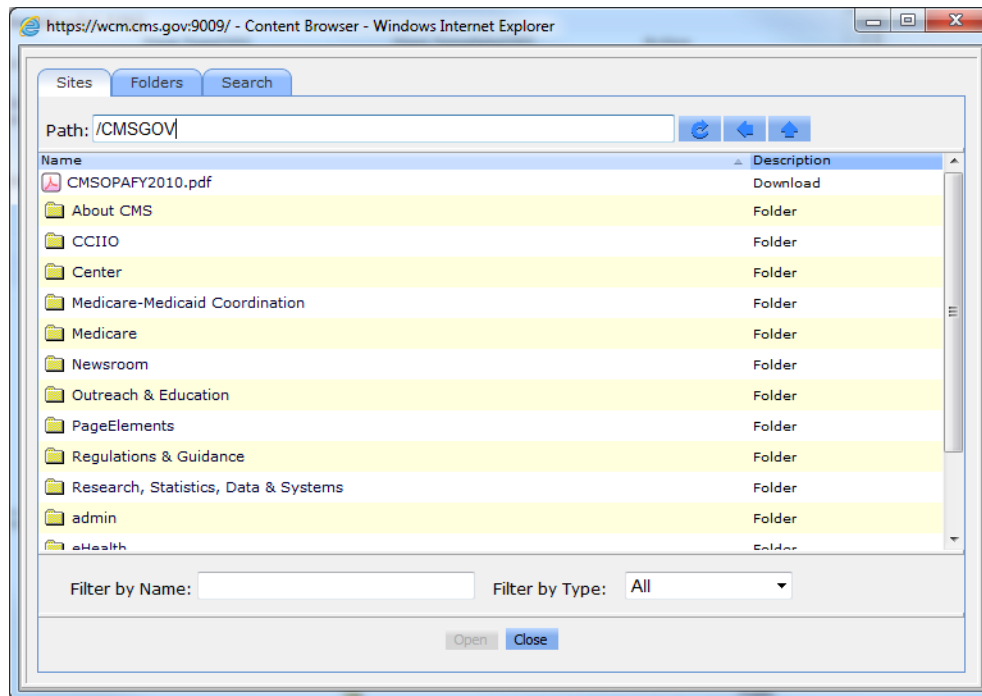


Figure 5a: Sites tab

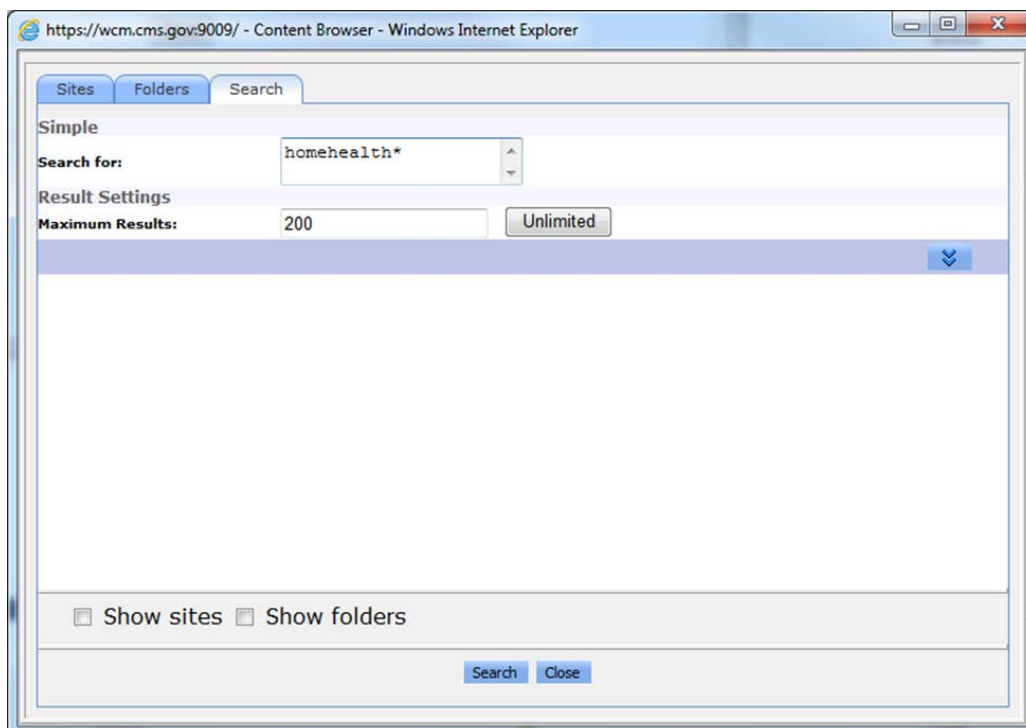


Figure 5b: Search tab

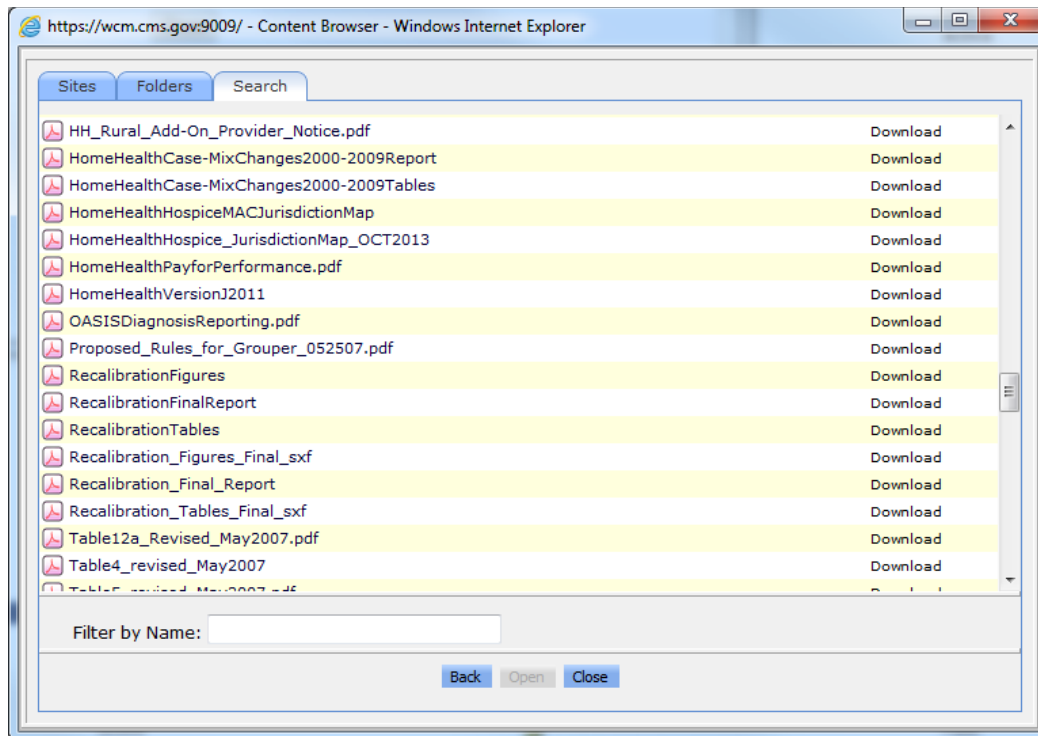


Figure 5c: Search results

3.3.2 Removing Downloads or Related Links from a Page

This subsection outlines the steps for removing downloads from the Downloads section on any page. The same steps apply for removing external links from the Related Links section of any page.

Table 6: Steps to remove Downloads or Related Links from a page

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS The content items will appear to the right of the screen.
2	Right click the content item where the item is being removed and select <i>Workflow > Quick Edit</i> . A pop-up window will appear.
3	(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window.
4	Click <i>Quick Edit</i> . This will put the item in a “Quick Edit” state and bring you back to the main content page. The “State” column will change to Quick Edit.

Step #	Description
5	Right click the item again and select <i>Active Assembly Table Editor (AATE)</i> and the AATE window will open. Note: <i>If the item was not put in to Quick Edit mode, then the AATE menu item will not be visible.</i>
6	Under the section named " <i>Slot (ID)</i> ", find the link that is being removed and click the red "X" under the " <i>Action</i> " column. (See Figure 6)
7	Click the <i>Close</i> button.
8	Right click the item and go to <i>Workflow > Check-in</i> to check the item back in. Important Note: It is strongly encouraged to always check content back into Percussion; otherwise you will have exclusive rights to this content item and no one else will be able to access the item. (See Section 6.0 on how to check to see if you have any items checked out exclusively by you.)
9	A pop-up window will appear. Enter a note that describes the updates made to the content item and click OK.
10	(Optional / Recommended) To preview your changes, right click the item and select <i>CMS Preview > [Content Name]</i> . A new webpage will open that looks like the page that was just updated. If additional changes need to be made, repeat steps 4 – 9. If no additional changes, proceed to step 11.
11	Right click the item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
12	(Recommended) Enter a description of the change in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.</i>
13	Click <i>Submit</i> . This will put the item in a "Review Edits" state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
14	Section Editors: For those users who also have Section Editor rights, you may also approve the content item to a "public" state. To approved the item to public: Right click the item and select <i>Workflow > Direct to Public</i> . Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i> .

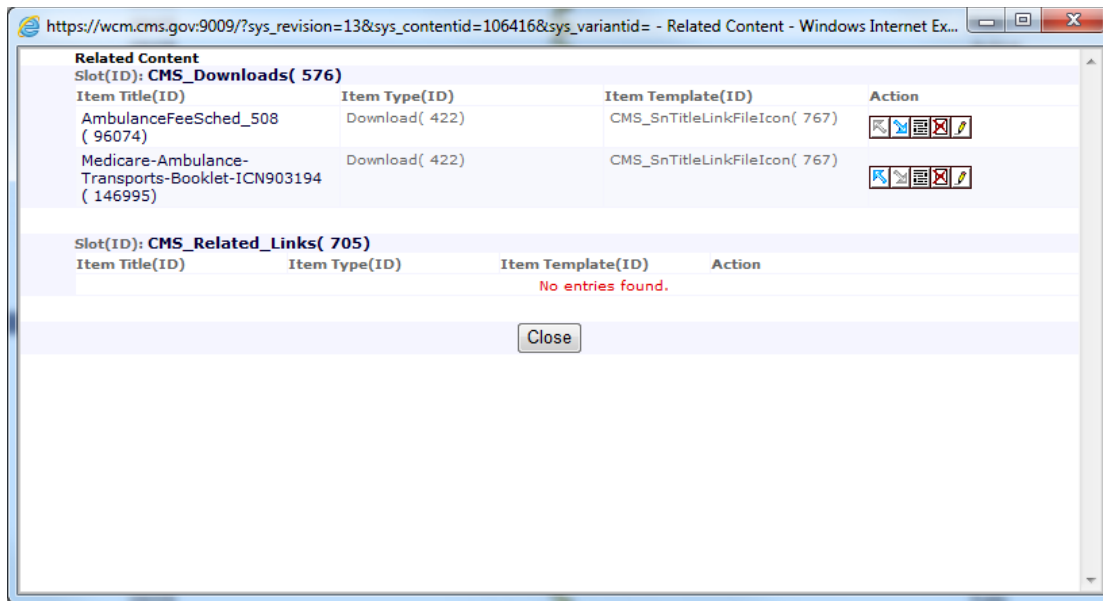


Figure 6: Active Assembly Table Editor

3.4 Create a Download

This section outlines the procedure for creating a new Download item in CMS.gov. This applies to Word, Excel, PDF, Zip and MP3 files. **All download items posted on CMS.gov must be 508 compliant.** See [Section 8](#) for instructions on how to check items for 508 compliance before posting to the web. There is also a size limitation for downloads. A file cannot be larger than 20MB. For files larger than 20MB, please open a JIRA ticket.

For instructions on creating or updating Image files, see [Section 3.6](#). Both external links and image files are considered “Other Content Types”.

Table 7: Steps to create a new download

Step #	Description
1	Save the download item to your desktop or network drive.
2	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS > Downloads</i>
3	On the left hand menu, right click the <i>Downloads</i> folder and select New Item > Download . The Edit Content window will open. (See Figure 7)
4	Enter a System Title. The System Title is the name of the file being downloaded in Percussion. This will determine the URL: “.../AcuteInpatientPPS/Downloads/System-title.pdf” Note: <i>The System Title should not have any spaces or special characters. Dashes should be used instead of underscores. The name should be generic for ease in replacing or revising files, and of constituent format of similar downloads. The filename can stay the</i>

Step #	Description
	<i>same, even if the date of the document changes. You do not need to include the file type (.pdf, .zip, etc.).</i>
5	Enter a Title. The Title is what is displayed to the users in the <i>Downloads</i> section of the web page.
6	Click the <i>Browse</i> button next to the <i>File</i> field. Navigate to the file that you saved on your desktop or network drive. Select it and click <i>Open</i> .
7	(Optional) Enter a description in the Description field.
8	Click <i>Insert</i> . This will add the new download item to the Downloads folder.
9	Click <i>Close</i> . The file will now appear on the right with the rest of the available downloads.
10	Right click the download item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
11	(Optional) Enter a description in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</i>
12	Click <i>Submit</i> . This will put the content item in a “Section Editor Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
13	Section Editors: For those users who also have Section Editor rights, you may also approve the download item to a “public” state. To approve the item to public, right click the download item and select <i>Workflow > Direct to Public</i> . Enter Workflow Comments (optional) in the top field. Click <i>Direct to Public</i> .

Figure 7: New Download content window

3.5 Update a Download

This section outlines the procedure for updating an existing download in CMS.gov. Documents are often updated, but the links to the Downloads themselves will remain the same unless the “System Title” changes. To simplify updates, the name (“Title”) of the document will remain the same as the previous version of the document, unless otherwise instructed by the analyst requesting the update. If the analyst is indicating that the link should be updated, change the “Title” for the item. Do not change the “System Title” field. Changing the “System Title” will cause previous versions of the download to remain on the web site. In this way, only the Download will need to be updated. The links to the Download on the section page will not need to be updated.

All download items posted on CMS.gov must be 508 compliant. See [Section 8](#) for instructions on how to check items for 508 compliance before posting to the web.

There is also a size limitation for downloads. A file cannot be larger than 20MB. For files larger than 20MB, please open a JIRA ticket.

Table 8: Steps to Update a Download

Step #	Description
1	Save the download item to your desktop or network drive. Note: All download items posted on CMS.gov must be 508 compliant. See Section 8 for instructions on how to check items for 508 compliance.
2	Navigate to the appropriate folder on the left hand menu: Example: Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS > Downloads

Step #	Description
3	Right click the download item to be updated and select <i>Workflow > Quick Edit</i> . A pop-up window will appear.
4	(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window.
5	Click <i>Quick Edit</i> . This will put the item in a “Quick Edit” state and bring you back to the main content/section page. The “State” column will change to Quick Edit.
6	Right click the download item being updated and select <i>Edit</i> . The Edit Content window will open. (See Figure 8)
7	Click the <i>Browse</i> button next to the <i>File</i> field. Navigate to the file that you saved on your desktop or network drive. Select it and click <i>Open</i> .
8	Click <i>Update</i> .
9	Click <i>Close</i> .
10	Right click the item and go to <i>Workflow > Check-in</i> to check the item back in. Important Note: It is strongly encouraged to always check content back into Percussion; otherwise you will have exclusive rights to this content item and no one else will be able to access the item. (See Section 6.0 on how to check to see if you have any items checked out exclusively by you.)
11	A pop-up window will appear. Enter a note that describes the updates made to the content item and click <i>OK</i> .
12	Right click the download item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
13	(Recommended) Enter a description of the change in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.</i>
14	Click <i>Submit</i> . This will put the item in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
15	Section Editors: For those users who also have Section Editor rights, you may also approve the download item to a “public” state. To approved the item to public: Right click the download item and select <i>Workflow > Direct to Public</i> . Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i> .

Step #	Description
	Note: When updating a “Title” field on a download which is located on a widget on a Center Page, you must also select the appropriate Center Page in the Provider Type folder (not the widget). Go to <i>Workflow > Move to Quick Edit</i> . Then, <i>Workflow > Direct to Public</i> , so the change can publish to the Center Page.

The screenshot shows a web browser window with the URL `https://wcm.cms.gov:9009/?sys_revision=2&sys_contentid=156952&sys_view=sys_All&sys_command=edit`. The page title is "Content Properties". The form contains the following fields and values:

- * System Title:** Quick_Reference_Home_Health_Services_Educationa
- * Title:** Quick Reference Information: Home Health Services i
- * Pub Date:** 2013-02-19 00:00:00.0
- * File:** (empty field with a "Browse..." button and "Clear" and "Preview File" links)
- Language:** English (dropdown menu)
- Binary Filename:** Quick_Reference_Home_Health_Services_Educational_Tool_ICN908504.pdf
- File Type:** application/pdf
- File Size:** 1262862
- Old URL:** (empty field)
- Description:** Quick Reference Information: Home Health Services Educational Tool (January 2013)
- Stellent_ContentID:** (empty field)

At the bottom of the form are "Update" and "Close" buttons.

Figure 8: Update a download content window

3.6 Other Content Types

This section outlines the procedure for creating or updating Other Content Type items in CMS.gov. This applies to external links and image files. Instructions for creating or updating each content type are provided below.

3.6.1 Create or Update an Image File

Image files are used on some webpages that include logos as part of the web page content. The table below outlines the steps for creating or updating an image file.

Table 9a: Steps for creating an Image File

Step #	Description
1	Save the image file to your desktop or network drive.
2	Navigate to the “Other Content Types” folder under the appropriate folder structure on the left hand menu:

Step #	Description
	Example: Sites > CMSGOV > Outreach & Education > Medicare Learning Network (MLN) > MLNProducts > Other Content Types
3	Right-click on the folder where you want to store the image file and select New Item > Image . The Edit Content window will open. (See Figure 9a)
4	Enter the “System Title” and “Title.” Note: The System Title should not have any spaces or special characters. Dashes should be used instead of underscores.
5	(Optional) Enter a description in the Description field.
6	Click the <i>Browse</i> button next to the <i>Image</i> field. Navigate to the file that you saved on your desktop or network drive. Select it and click <i>Open</i> .
7	(Optional) Enter keywords separated by commas in the Keywords field.
8	In the “Image Alt Text” field, enter a short description of the image. Example: “MLN Connects eNews logo”
9	Click <i>Insert</i> . This will add the new image item to the Other Content Types folder.
10	Click <i>Close</i> .
11	Right click the new item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
12	(Optional) Enter a description in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.
13	Click <i>Submit</i> . This will put the content item in a “Section Editor Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
14	Section Editors: For those users who also have Section Editor rights, you may also submit the Image up to the Senior Editor Level. Right click the item and select <i>Workflow > Submit for Senior Editor Review</i> . Enter Workflow Comments (recommended) in the top field. Enter the email addresses (optional) of the CMS approvers in the bottom field, separated by semicolons. This will put the item in “Senior Editor Review Edits” state. Note: If no email address is entered, make note of the Content ID number for the item that was created to send to the Senior Editor.

Step #	Description
15	Senior Editors: For those users who also have Senior Editor rights, you may approve the image to public by right clicking on the item and selecting <i>Workflow > Approve for Return to Public</i> .

Table 9b: Steps for updating an Image File

Step #	Description
1	Save the image file to your desktop or network drive.
2	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Outreach & Education > Medicare Learning Network (MLN) > MLNProducts > Other Content Types</i>
3	Right click the item to be updated and select <i>Workflow > Quick Edit</i> . A pop-up window will appear.
4	(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window.
5	Click <i>Quick Edit</i> . This will put the item in a “Quick Edit” state and bring you back to the main content/section page. The “State” column will change to Quick Edit.
6	Right click the item being updated and select <i>Edit</i> . The Edit Content window will open.
7	Click the <i>Browse</i> button next to the <i>Image</i> field. Navigate to the file that you saved on your desktop or network drive. Select it and click <i>Open</i> .
8	Click <i>Update</i> . Click <i>Close</i> .
9	Right click the item and go to <i>Workflow > Check-in</i> to check the item back in. Important Note: It is strongly encouraged to always check content back into Percussion; otherwise you will have exclusive rights to this content item and no one else will be able to access the item. (See Section 6.0 on how to check to see if you have any items checked out exclusively by you.)
10	A pop-up window will appear. Enter a note that describes the updates made to the content item and click <i>OK</i> .
11	Right click the item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
12	(Recommended) Enter a description of the change in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.

Step #	Description
	Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.</i>
13	Click <i>Submit</i> . This will put the content item in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
14	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also submit the Image up to the Senior Editor Level.</p> <p>Right click the item and select <i>Workflow > Submit for Senior Editor Review</i>. Enter Workflow Comments (recommended) in the top field. Enter the email addresses (optional) of the CMS approvers in the bottom field, separated by semicolons. This will put the item in “Senior Editor Review Edits” state.</p> <p>Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Senior Editor.</i></p>
15	<p>Senior Editors:</p> <p>For those users who also have Senior Editor rights, you may approve the Image to public by right clicking on the item and selecting <i>Workflow > Approve for Return to Public</i>.</p>

System Title:

Title:

Pub Date: 2014-03-05

Description:

* Image:

Image File Name:

Image Mime Type:

Image Height (max 612 pix):

Image Width (max 792 pix):

Keywords:

Image Source:

Thumbnail:

Thumbnail File Name:

Thumbnail Height:

Thumbnail Width:

Thumbnail File Size:

ImageType:

* Image Alt Text:

Figure 9a: New Image content window

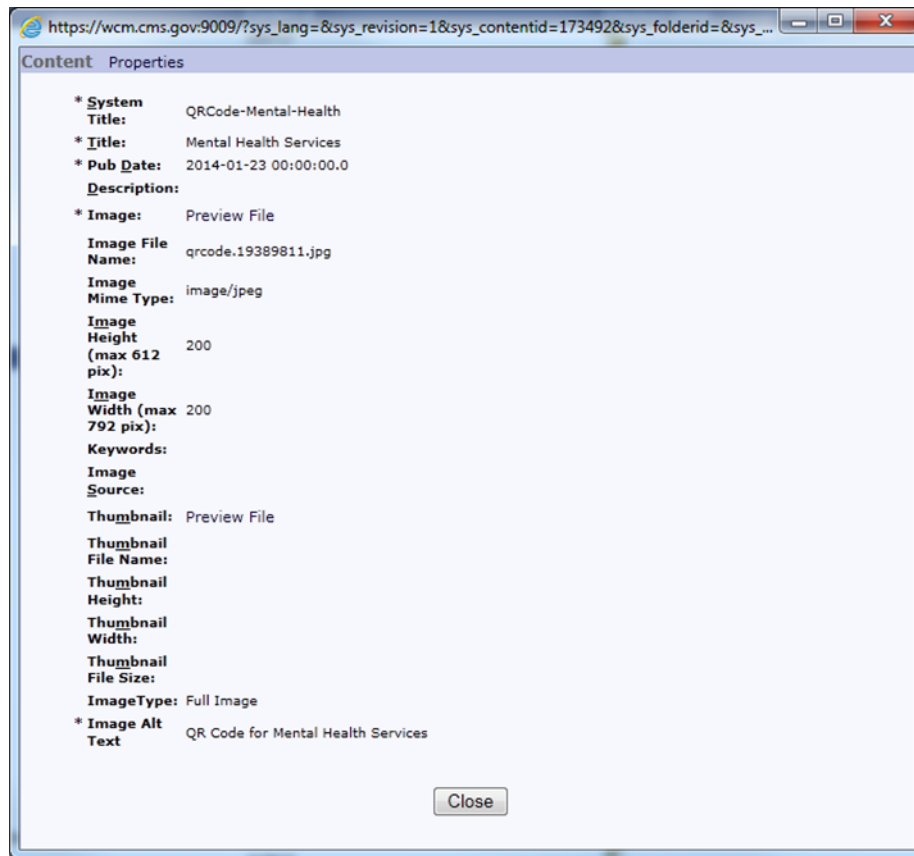


Figure 9b: Completed Image content window

3.6.2 Create or Update an External Link

To add an external link to a page as a Related Link, you must first create a content item using the External Link content type. External Links are usually any links outside of cms.gov; however, they are also used to create AMA or AHA agreements.

Table 10a: Steps for creating an External Link

Step #	Description
1	Navigate to the "Other Content Types" folder under the appropriate folder structure on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS > Other Content Types</i>
2	Right-click on the folder where you want to store the external link and select New Item > CMS External Link . The Edit Content window will open. (See Figure 10a)
3	Enter the "System Title" and "Link Title." Note: <i>The System Title should not have any spaces or special characters. Dashes should be used instead of underscores.</i>

Step #	Description
	The <i>Link Title</i> is what is displayed to the users in the “Related Links” section of the web page.
4	In “ <i>External Link Path</i> ,” enter the full URL. Always include the http:// or https://.
5	(Optional) Enter a description in the “Description” field. (Optional) Enter keywords separated by commas, in the “Keywords” field (as provided in the web request form.)
6	To save, click <i>Insert</i> .
7	Click <i>Close</i> to exit the web form.
8	Right click the new external link and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
9	(Optional) Enter a description in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</i>
10	Click <i>Submit</i> . This will put the item in a “Section Editor Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
11	Section Editors: For those users who also have Section Editor rights, you may also submit the External Link up to the Senior Editor Level. Right click the section page and select <i>Workflow > Submit for Senior Editor Review</i> . Enter Workflow Comments (recommended) in the top field. Enter the email addresses (optional) of the CMS approvers in the bottom field, separated by semicolons. This will put the item in “Senior Editor Review Edits” state. Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Senior Editor.</i>
12	Senior Editors: For those users who also have Senior Editor rights, you may approve the External Link to public by right clicking on the item and selecting <i>Workflow > Approve for Return to Public</i> .

Table 10b: Steps for updating an External Link

Step #	Description
1	Navigate to the appropriate folder on the left hand menu:

Step #	Description
	Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > AcuteInpatientPPS > Other Content Types</i>
2	Right click the item to be updated and select <i>Workflow > Quick Edit</i> . A pop-up window will appear.
3	(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window.
4	Click <i>Quick Edit</i> . This will put the item in a “Quick Edit” state and bring you back to the main content/section page. The “State” column will change to Quick Edit.
5	Right click the item being updated and select <i>Edit</i> . The Edit Content window will open.
6	Edit the appropriate field. (Usually the “External Link Path”.)
7	Click <i>Update</i> . Click <i>Close</i> .
8	Right click the item and go to <i>Workflow > Check-in</i> to check the item back in. Important Note: It is strongly encouraged to always check content back into Percussion; otherwise you will have exclusive rights to this content item and no one else will be able to access the item. (See Section 6.0 on how to check to see if you have any items checked out exclusively by you.)
9	A pop-up window will appear. Enter a note that describes the updates made to the content item and click <i>OK</i> .
10	Right click the item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
11	(Recommended) Enter a description of the change in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.</i>
12	Click <i>Submit</i> . This will put the item in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
13	Section Editors: For those users who also have Section Editor rights, you may also submit the External Link up to the Senior Editor Level. Right click the item and select <i>Workflow > Submit for Senior Editor Review</i> . Enter Workflow Comments (recommended) in the top field. Enter the email addresses (optional) of the CMS approvers in the bottom field, separated by semicolons. This will put the item in “Senior Editor Review Edits” state.

Step #	Description
	Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Senior Editor.</i>
14	Senior Editors: For those users who also have Senior Editor rights, you may approve the External Link to public by right clicking on the item and selecting <i>Workflow > Approve for Return to Public</i> .

The screenshot shows a web browser window with the URL https://wcm.cms.gov:9009/?sys_view=sys_All&sys_command=edit&sys_folderid=86731. The form contains the following fields:

- * System Title:
- * Link Title:
- * External Link Path (include protocol, e.g. "http://" or "https://"):
- Description:
- Keywords:
- * Pub Date: 2014-03-05

At the bottom of the form are two buttons: **Insert** and **Close**.

Figure 10a: New CMS External Link content window

The screenshot shows a web browser window with the URL https://wcm.cms.gov:9009/?sys_lang=&sys_revision=2&sys_contentid=161472&sys_folderid=&sys.... The window displays the following information:

- System Title:** CMS-1449-P-PDF-link
- Link Title:** CMS-1449-P (PDF Version)
- External Link Path (include protocol, e.g. "http://" or "https://"):** <http://www.gpo.gov/fdsys/pkg/FR-2013-05-10/pdf/2013-10389.pdf>
- Description:** CMS-1449-P
- Keywords:** CMS-1449-P
- Pub Date:** 2013-04-25 00:00:00.0

Below the details is a section titled **Related Content** with a message: **No Slots registered for this content type.** At the bottom is a **Close** button.

Figure 10b: Completed CMS External Link content window

3.7 Create a Dynamic List Item

A Dynamic List on CMS.gov displays a list of content items generated dynamically from Percussion (See [Figure 11](#)). List items can be added, replaced, modified, or removed during the lifetime of the list. Before a Dynamic List Item can be created, the Dynamic List itself must be defined. Dynamic Lists are normally defined by someone in WNMG; however, some members of the DPCT web team have been given the ability to define a new Dynamic List if needed. See [Section 9](#) for additional resources on how to define a new Dynamic List if you have this capability. If you do not have this capability, please see [Section 5](#) on how to request one be created.

For more detailed information on the differences between Dynamic List and Dynamic List Items, please see [Section 9](#) and click on “*How to Edit Dynamic Lists on CMS.gov*”.

The table below outlines the steps for creating a Dynamic List Item and should not be confused with defining a Dynamic List.

Table 11a: Steps to create a Dynamic List Item

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > Hospice > Hospice Regulations and Notices Items</i>
2	Right-click on the folder where you want to create the new content item and select New Item > Dynamic List Item .
3	The Dynamic List Item content type form opens. (See Figure 12a)
4	In “System Title,” enter a unique file name which will form the URL. Do not include spaces or special characters (such as !@#\$\$%^&*+=\). Use dashes (-) instead of spaces or underscores between words.
5	In “Title,” enter the title you want to display on the page.
6	Before you can complete the rest of the form, you will need to select which Dynamic List you want to create from a drop down box. There may be multiple options in the drop down box or just one option depending on how many Dynamic Lists have been defined for that particular folder. (See Figure 12a)
7	After you have selected which Dynamic List you want to create, the list of available fields will populate the form for you to complete. (See Figure 12b). Note: <i>Not all Dynamic Lists are the same. Depending on how each one is defined will determine what fields will be available on each list item.</i>
8	After all required fields have been completed; Click <i>Insert</i> to save it.
9	Click <i>Close</i> to exit the web form.

Step #	Description
10	Right click the new item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
11	<p>(Optional) Enter a description in the top field.</p> <p>(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.</p> <p>Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</i></p>
12	Click <i>Submit</i> . This will put the item in a “Section Editor Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
13	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public:</p> <p>Right click the download item and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (optional) in the top field. Click <i>Direct to Public</i>.</p>

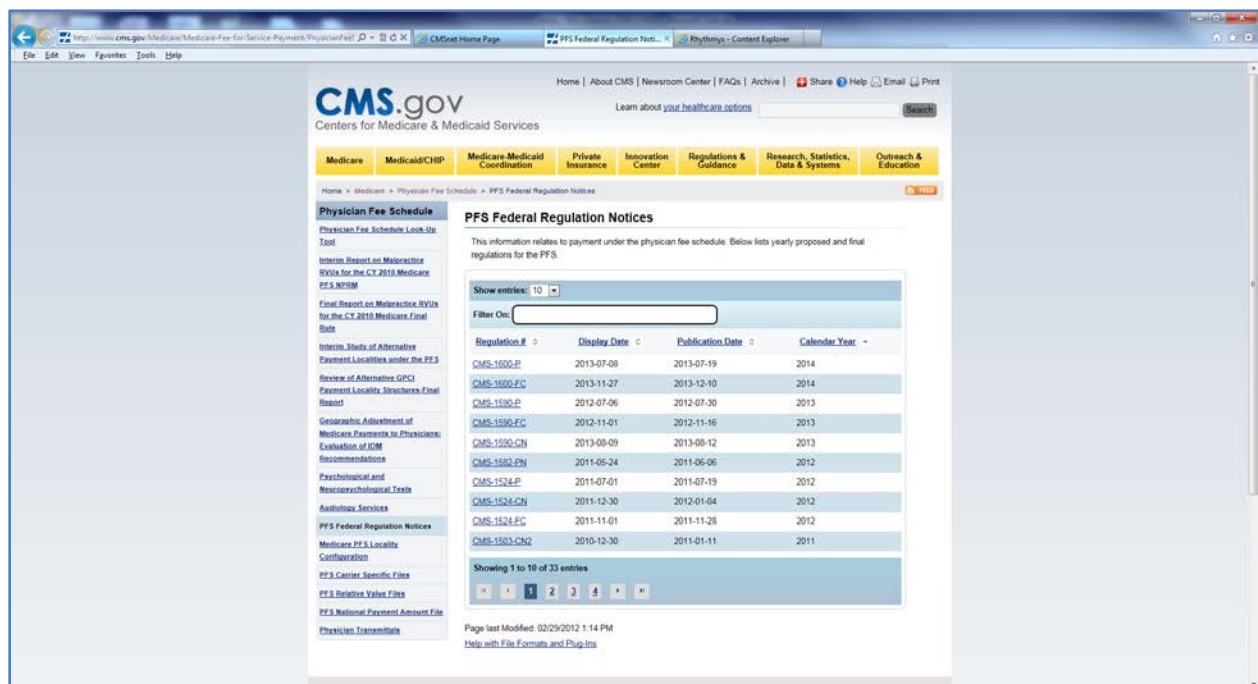


Figure 11: Dynamic List Section Page

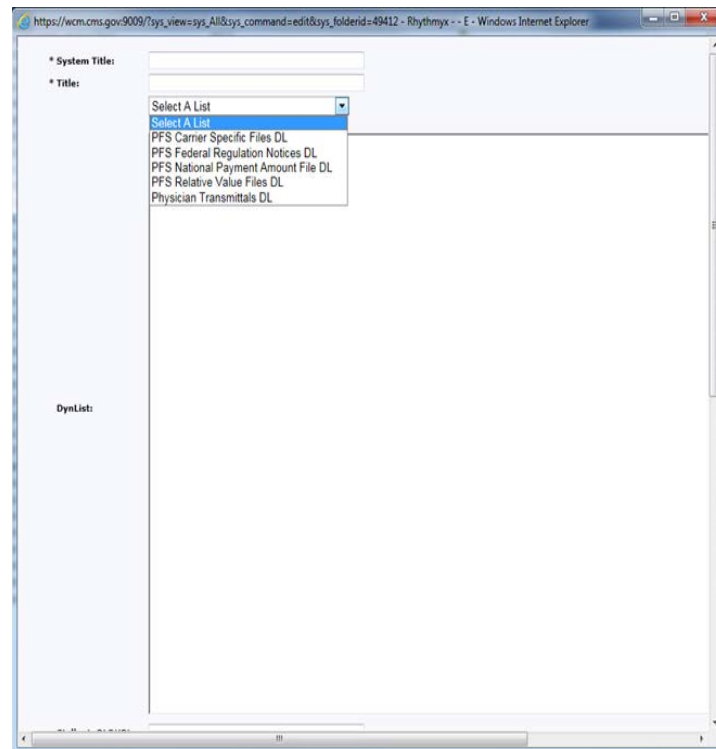


Figure 12a: New Dynamic List Item (pre-selection)

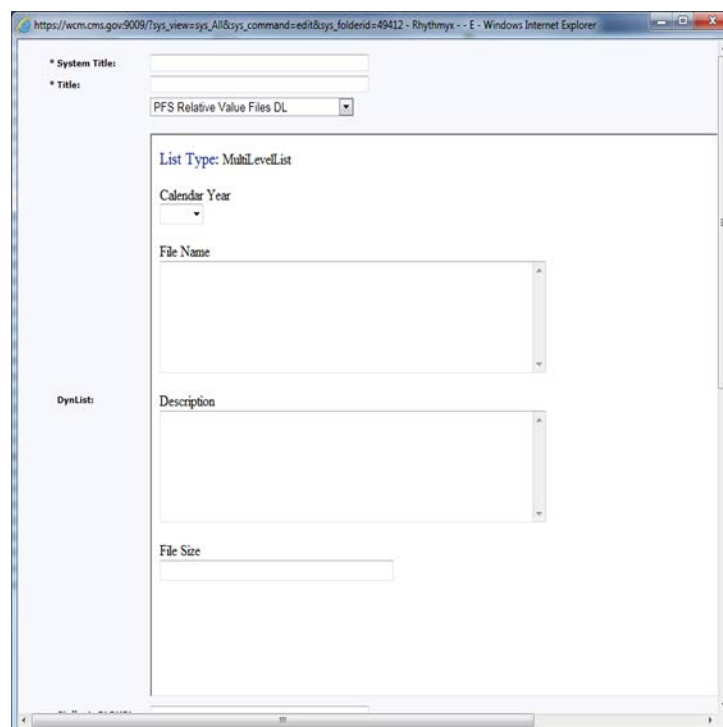


Figure 12b: New Dynamic List Item (post selection)

3.8 Update a Dynamic List item

The table below outlines the procedure for updating an existing Dynamic List Item. This includes submitting the page for approval to the Section Editor if you are the Contributing Editor. If you are also the Section Editor, you may continue the process to approve the page to a “public” state as well.

Table 11b: Steps to update a Dynamic List Item

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > Hospice > Hospice Regulations and Notices Items</i>
2	Right click the Dynamic List Item that is being edited and select <i>Workflow > Quick Edit</i> . A pop-up window will appear.
3	(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window.
4	Click <i>Quick Edit</i> . This will put the item in a “Quick Edit” state and bring you back to the main content page. The “State” column will change to Quick Edit.
5	Right click the Dynamic List Item again and select <i>Edit</i> . The Edit Content window will open.
6	Click on the field(s) that is/are going to be updated.
7	Update the content as necessary. *If you had to add a new option to a dropdown list, you won’t see it on existing dynamic list items. You will have to recreate the dynamic list item to select the new option.
8	After all required fields have been completed; Click <i>Update</i> to save it.
9	Click <i>Close</i> to exit the web form.
10	Right click the new item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
11	(Optional) Enter a description in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</i>
12	Click <i>Submit</i> . This will put the item in a “Section Editor Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.

Step #	Description
13	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public:</p> <p>Right click the download item and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (optional) in the top field. Click <i>Direct to Public</i>.</p>

3.9 Update a Center Page List Widget

A Center Page consists of a collection of List Widgets. These List Widgets enable the content to be displayed in various sections on a page. More information about Center Pages is available on CMS SharePoint in the [Web Team Library](#).

Center Pages can only be created by someone in WNMG. To request a new Center Page, please see [Section 5](#).

The table below outlines the steps for updating an existing Center Page List Widget. As mentioned above, Center Pages consists of List Widgets so the steps outlined below apply to updating any List Widget.

Table 12: Steps to update a Center Page List Widget

Step #	Description
1	<p>Navigate to the appropriate folder on the left hand menu:</p> <p>Example: <i>Sites > CMSGOV > Center > Provider Type > Hospice</i></p>
2	Right click the List Widget (ie: Spotlight) to be updated and select <i>Workflow > Quick Edit</i> . A pop-up window will appear.
3	(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window.
4	<p>Click <i>Quick Edit</i>.</p> <p>This will put the item in a “Quick Edit” state and bring you back to the main content/section page. The “State” column will change to Quick Edit.</p>
5	Right click the item being updated and select <i>Edit</i> . The Edit Content window will open.
6	Modify the Body as necessary.
7	<p>(Optional) Enter a description in the “Description” field.</p> <p>(Optional) Enter keywords separated by commas, in the “Keywords” field (as provided in the web request form.)</p>
8	Click <i>Update</i> . Click <i>Close</i> .

Step #	Description
9	Right click the item and go to <i>Workflow > Check-in</i> to check the item back in. Important Note: It is strongly encouraged to always check content back into Percussion; otherwise you will have exclusive rights to this content item and no one else will be able to access the item. (See Section 6.0 on how to check to see if you have any items checked out exclusively by you.)
10	A pop-up window will appear. Enter a note that describes the updates made to the content item and click <i>OK</i> .
11	Right click the item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
12	(Recommended) Enter a description of the change in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.
13	Click <i>Submit</i> . This will put the item in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
14	Section Editors: For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public: Right click the download item and select <i>Workflow > Direct to Public</i> . Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i> . Note: When a “Title” field on a download has been updated which is located on a widget on a Center Page, you must also select the appropriate Center Page in the Provider Type folder (not the widget). Go to <i>Workflow > Move to Quick Edit</i> . Then, <i>Workflow > Direct to Public</i> , so the change can publish to the Center Page.

3.10 Create a List Widget

List Widgets are mainly used on Center Pages in CMS.gov. The table below outlines the steps to create a new List Widget and add it the Center Page.

Table 13: Steps to create a List Widget

Step #	Description
1	Navigate to the folder where the List Widget will need to be created. Example: <i>Sites > CMSGOV > Center > Provider Type > Hospice</i>
2	Right-click on the folder where you want to create the new content item and select New Item > List Widget .

Step #	Description
3	The List Widget content type form opens. Asterisks indicate required fields—you cannot save the item if these are blank. (See Figure 13)
4	In “ <i>System Title</i> ,” enter a unique file name. Do not include spaces or special characters (such as !@#%&^*~+=V). Use dashes (-) instead of spaces or underscores between words.
5	In “ <i>Title</i> ,” enter the title you want to display on the page.
6	Click in the “ <i>List Body</i> ” field to add content to the page.
7	To save the content item, click <i>Insert</i> . This will create the item and put it in a “Draft” state.
8	Click <i>Close</i> to exit the web form window.
9	Right click the item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
10	<p>(Optional) Enter a description in the top field.</p> <p>(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.</p> <p>Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</i></p>
11	Click <i>Submit</i> . This will put the item in a “Section Editor Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
12	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the List Widget to a “public” state. To approved the item to public:</p> <p>Right click the item and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (optional) in the top field. Click <i>Direct to Public</i>.</p>
13	<p>Section Editors:</p> <p>After the List Widget has been pushed to a “public” state; Section Editors must also add the new List Widget to the Center Page.</p> <p><u>To Add a NEW List Widget to the Center Page:</u></p> <ul style="list-style-type: none"> Navigate to the folder where the Center Pages are located. These should contain Content Types of “Center Page”. Example: <i>Sites > CMSGOV > Center > Provider Type</i> Right click on the Center Page where the new List Widget will be added (Example: <i>Hospice</i>) and select <i>Workflow > Move to Quick Edit</i>. Right click on the Center Page again and select <i>Active Assembly Table Editor</i> (AATE) and the AATE window will open. (See Figure 14) You can add the new List Widget to either the Left Hand (LH) or Right Hand (RH) column of the page by clicking on either <i>CMS_CenterPageBody_LH</i> or <i>CMS_CenterPageBody_RH</i> link.

Step #	Description
	<ul style="list-style-type: none"> Search or Navigate to the folder where the new List Widget was created. Find the item and select it. Click “<i>Select</i>”. This will add the List Widget to the Center Page. Click “<i>Close</i>”. This will close the AATE window. Right click the Center Page and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i>.

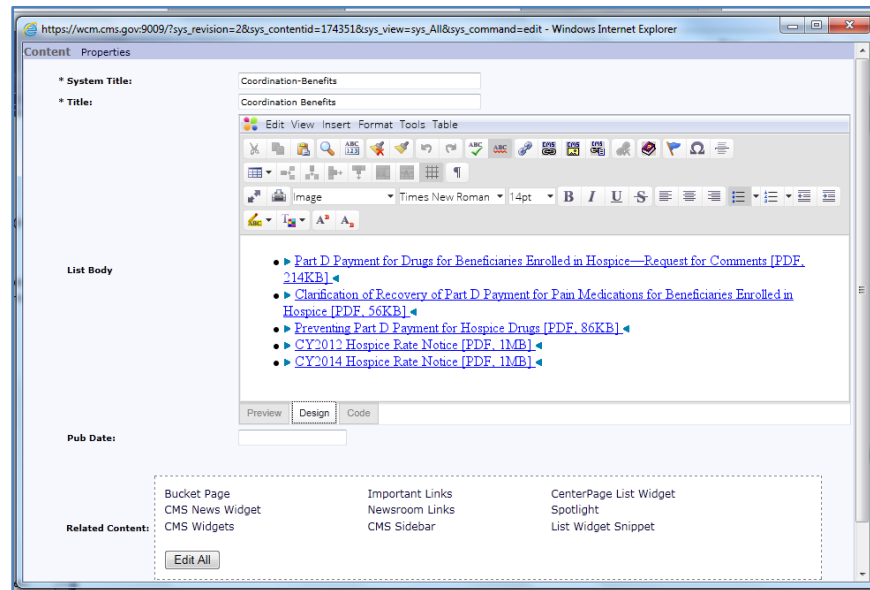


Figure 13: List Widget content Window

Related Content

Slot(ID): **CMS_CenterPage_Body_LH(645)**

Item Title(ID)	Item Type(ID)	Item Template(ID)	Action
Regulations and Related Transmittals(46118)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Billing and Payment Information (46119)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Wage Index Files(46120)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Managed Care Information (46121)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Medicare Hospice Data(46122)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Medicaid Information(46123)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Enrollment Participation and Certification(46124)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Educational Resources(46125)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Beneficiary Notices Initiative (46126)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Uninsured Information(46127)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Research and Analyses (161882)	List Widget(458)	CMS_List_Widget(777)	[Icons]

Slot(ID): **CMS_CenterPage_Body_RH(647)**

Item Title(ID)	Item Type(ID)	Item Template(ID)	Action
Hospice Face to Face(146372)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Quality Initiatives(46128)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Other Important Hospice Information(46129)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Demonstration(46130)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Coding(46131)	List Widget(458)	CMS_List_Widget(777)	[Icons]
National Provider Identifier NPI (46133)	List Widget(458)	CMS_List_Widget(777)	[Icons]
CMS Manuals and Transmittals (46134)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Medicare Secondary Payer (46135)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Fraud and Abuse(46136)	List Widget(458)	CMS_List_Widget(777)	[Icons]
How to Stay Informed(46137)	List Widget(458)	CMS_List_Widget(777)	[Icons]
General Provider Information Coverage(46138)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Coordination-Benefits(174351)	List Widget(458)	CMS_List_Widget(777)	[Icons]
Contacts(46139)	List Widget(458)	CMS_List_Widget(777)	[Icons]

Slot(ID): **CMS_GlobalHeader(689)**

Item Title(ID)	Item Type(ID)	Item Template(ID)	Action
No entries found.			

Figure 14: Center page – Active Assembly Table Editor content window

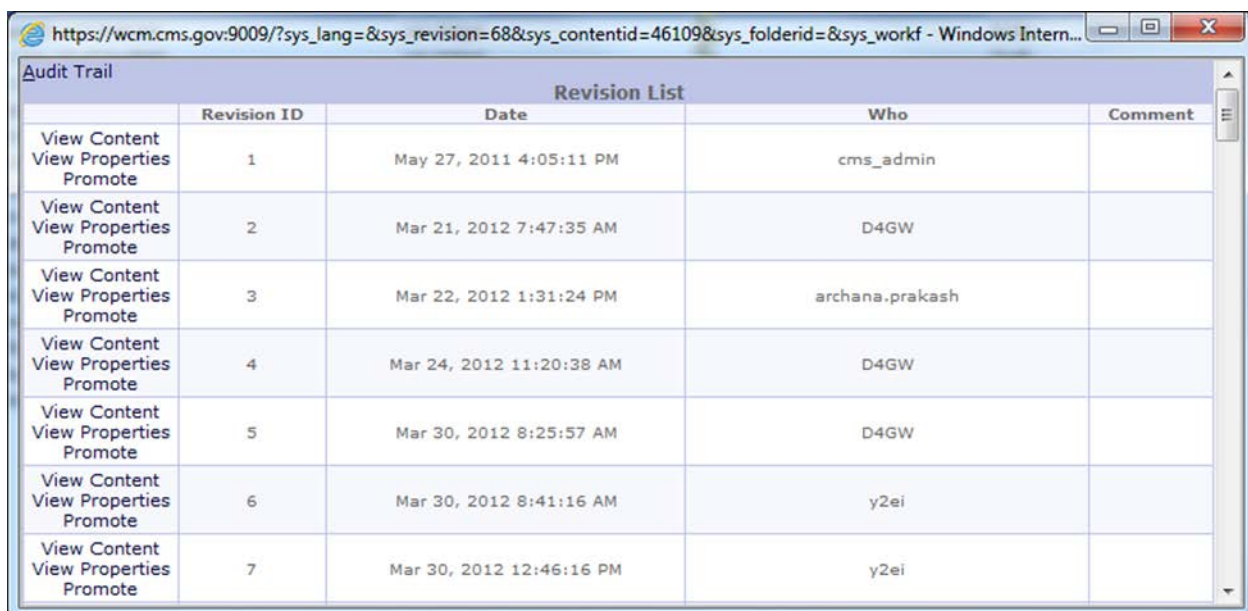
3.11 Promote a Previous Version of a Content Item

To roll-back to a previous published version of a content item, you must “promote” a revision. “Promote” displays only if there are two or more published versions of a content item. When published, the promoted version becomes the newest version.

Table 14: Steps to promote a previous version

Step #	Description
1	Navigate or search for the content item.
2	Right click on the item and then select <i>Workflow > Quick Edit</i> . A pop-up window will appear.
3	(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window.
4	Click <i>Quick Edit</i> . This will put the item in a “Quick Edit” state and bring you back to the main content/section page. The “State” column will change to Quick Edit.

Step #	Description
5	Right click the content item and then select <i>View > Revision</i> . (See Figure 15)
6	Select <i>Promote</i> for the version you want to promote, noting the correct Revision ID & Date. Verify the correct version by using <i>View Content</i> .
7	Right click the item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
8	<p>(Recommended) Enter a description of the change in the top field.</p> <p>(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.</p> <p>Note: If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.</p>
9	Click <i>Submit</i> . This will put the item in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
10	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public:</p> <p>Right click the item and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i>.</p>



Revision List			
	Revision ID	Date	Who
View Content View Properties Promote	1	May 27, 2011 4:05:11 PM	cms_admin
View Content View Properties Promote	2	Mar 21, 2012 7:47:35 AM	D4GW
View Content View Properties Promote	3	Mar 22, 2012 1:31:24 PM	archana.prakash
View Content View Properties Promote	4	Mar 24, 2012 11:20:38 AM	D4GW
View Content View Properties Promote	5	Mar 30, 2012 8:25:57 AM	D4GW
View Content View Properties Promote	6	Mar 30, 2012 8:41:16 AM	y2ei
View Content View Properties Promote	7	Mar 30, 2012 12:46:16 PM	y2ei

Figure 15: Promote a previous version

3.12 Archive a Content Item

Occasionally, content will become obsolete and an analyst will request that an item be “deleted” or “removed” from a web page. We do not actually “delete” any content items in Percussion. These items become “archived”. Archiving an item will remove it from being visible on a webpage but will still make it available in the event the requestor changes their mind, made a mistake on which item to remove, or decides to reinstate the obsolete item.

Important: Before archiving a content item, please ensure that it is not associated with another content item such as a Section Page, Dynamic List or List Widget. See [Section 3.13](#) for instructions on how to check for associated content.

The table below outlines the steps for archiving any content item.

Table 15: Steps for Archiving a Content Item

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > Hospice > Downloads</i>
2	Right click the item to be archived and select <i>Workflow > Submit for Expiration</i> . A pop-up window will appear.
3	(Required) Enter a reason for the archive in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.</i>
4	Click <i>Submit for Expiration</i> . This will put the item in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
5	Section Editors: For those users who also have Section Editor rights, you may also approve the item to an “Archive” state. To approved the item to be archived: Right click the download item and select <i>Workflow > Expire</i> . Enter Workflow Comments (required) in the top field. Click <i>Expire</i> .

3.13 Revive or Republish an Archived Item

On occasion, a previously archived item will need to be revived or republished in the event the requestor changed their mind, made a mistake on which item to remove, or decides to reinstate the obsolete item.

The table below outlines the steps for reviving or republishing any content item from an “Archive” state.

Table 16: Steps to revive or republish a previously archived item

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > Hospice > Downloads</i>
2	Right click the archived item and select either <i>Workflow > Revive</i> or <i>Workflow > Republish</i> . Revive – will move the item from an “Archive” state back to a “Draft” state so that you can edit the item before pushing it back to public. Republish – will move the item from an “Archive” state back to a “Public” state without any changes to the item.
3	(Optional) Enter a basic description of why the item is being republished or revived in the Workflow Comments box in the pop-up window.
4	Click <i>Revive</i> or <i>Republish</i> , depending on which workflow you selected.
5	If you selected “ <i>Republish</i> ”, the item will be put in a “Public” state and no further action is needed. If you selected “ <i>Revive</i> ”, the item will be put in a “Draft” state and you will need to resubmit any changes to the Section Editor for approval before it can become “Public”.
6	<u>If Reviving an item:</u> Right click the item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
7	(Recommended) Enter a description of the change in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was edited to send to the Section Editor.</i>
8	Click <i>Submit</i> . This will put the item in a “Review Edits” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
9	Section Editors: For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public: Right click the item and select <i>Workflow > Direct to Public</i> . Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i> .

3.14 Check for Associated Content

To check to see if an item is associated with another content item, perform the steps identified in the table below.

Table 17: Steps to check for associated content

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > Hospice > Downloads</i>
2	Right click the item to be checked and select <i>Impact Analysis</i> . A pop-up window will appear.
3	Under the “Ancestors” pane, there will be a plus sign next to a content item that is associated with the item being checked. See Figure 16a . If the item is not associated with a content item, then there would be nothing listed under the item. See Figure 16b .

Note: If a content item was referenced using a “hyperlink” instead of a Rhythmyx inline or Rhythmyx template link on another page, the Impact Analysis will NOT pick it up. See [Troubleshooting Tips](#) on how to fix this.

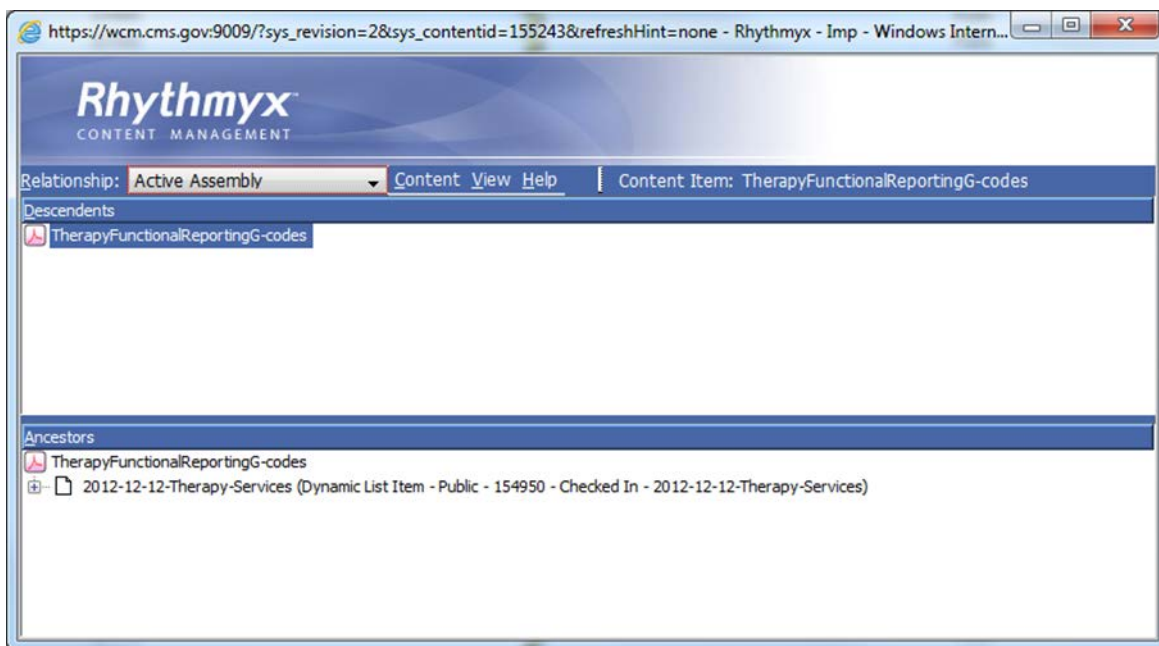


Figure 16a: Example of a Download item associated with a Dynamic List

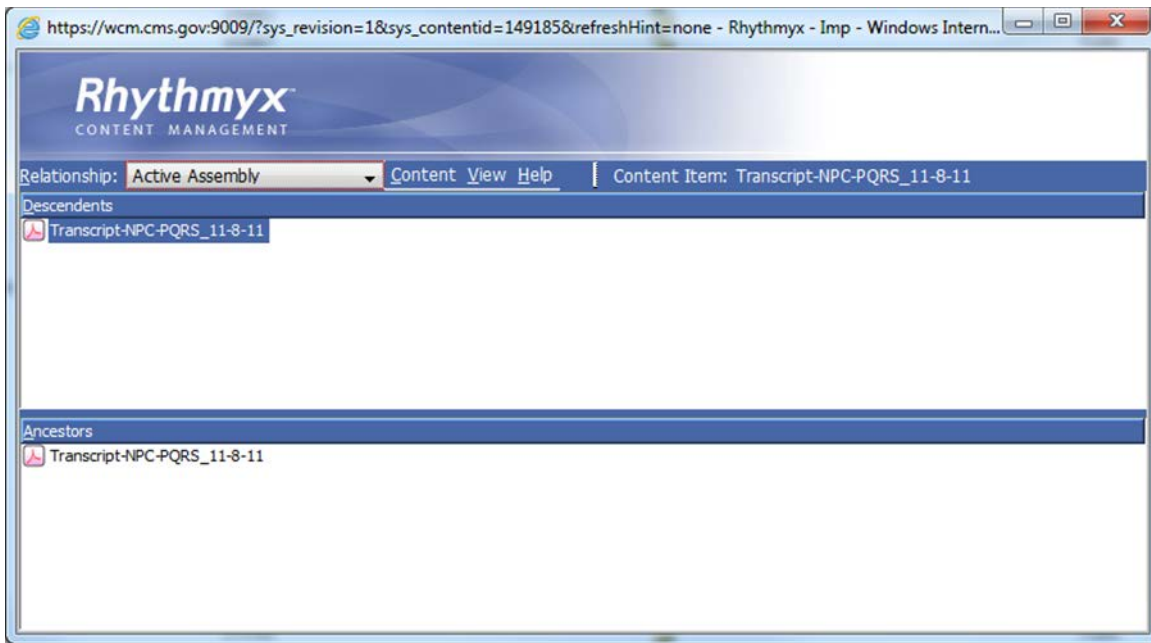


Figure 16b: Example of a Download item that is NOT associated with another content item.

3.15 Update a Navon

A Navon is a content item that tells pages what to include in the sub-navigation. A Navon is created every time a folder (or new Section) is created. On CMS.gov, content managed within a Navon appears in the left-hand sub-navigation of pages.

A Navon should already be created for all main pages that exist on CMS.gov. Anytime a new Section Page is created, it will need to be included in the Navon in order for it to show up in the left navigation menu of a page.

Navons do not update as often as other content types under the current publishing cycle configuration. Currently, Navons update around 11:00 am and 5:30 pm on week days.

More detailed information about editing Navons can be found by visiting the following URL: <http://intranet.cms.gov/Component/OC/Percussion-Training/Documents/cms-gov-how-to-navons.pptx>

The table below provides the basic common steps for updating a Navon after creating a new Section Page.

Table 18: Steps for updating a Navon for a new Section Page

Step #	Description
1	Navigate to the appropriate folder on the left hand menu: Example: <i>Sites > CMSGOV > Medicare > Medicare Fee-for-Service Payment > Hospice.</i>
2	Right click the Navon and select <i>Workflow > Quick Edit</i> . A pop-up window will appear.

Step #	Description
3	(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window.
4	Click <i>Quick Edit</i> . This will put the item in a “Quick Edit” state and bring you back to the main content/section page. The “State” column will change to Quick Edit.
5	Right click the content item again and select Active Assembly Table Editor (AATE) and the AATE window will open. (See Figure 17) Note: <i>If the item was not put in to Quick Edit mode, then the AATE menu item will not be visible.</i>
6	Under “Related Content Control,” click on <i>CMS_SectionItems</i> slot.
7	In the “Content Browser,” use the Sites tab to locate the folder where the new page item resides.
8	Select the item (page) you want to insert and Click <i>Open</i> . The page you selected now appears under the “ <i>CMS_SectionItems</i> ” slot. The <i>Title</i> field of the page item will display in the left-hand sub-navigation.
9	Click <i>Close</i> to close the “Related Content Control” window.
10	Click the <i>Update</i> button at the bottom to save your changes.
11	After the update has completed. Click the <i>Close</i> button.
12	Section Editors: Section Editors may approve an item directly to public by right clicking the item and selecting <i>Workflow > Direct to Public</i> . Enter Workflow Comments (recommended) in the top field. Click <i>Direct to Public</i> .

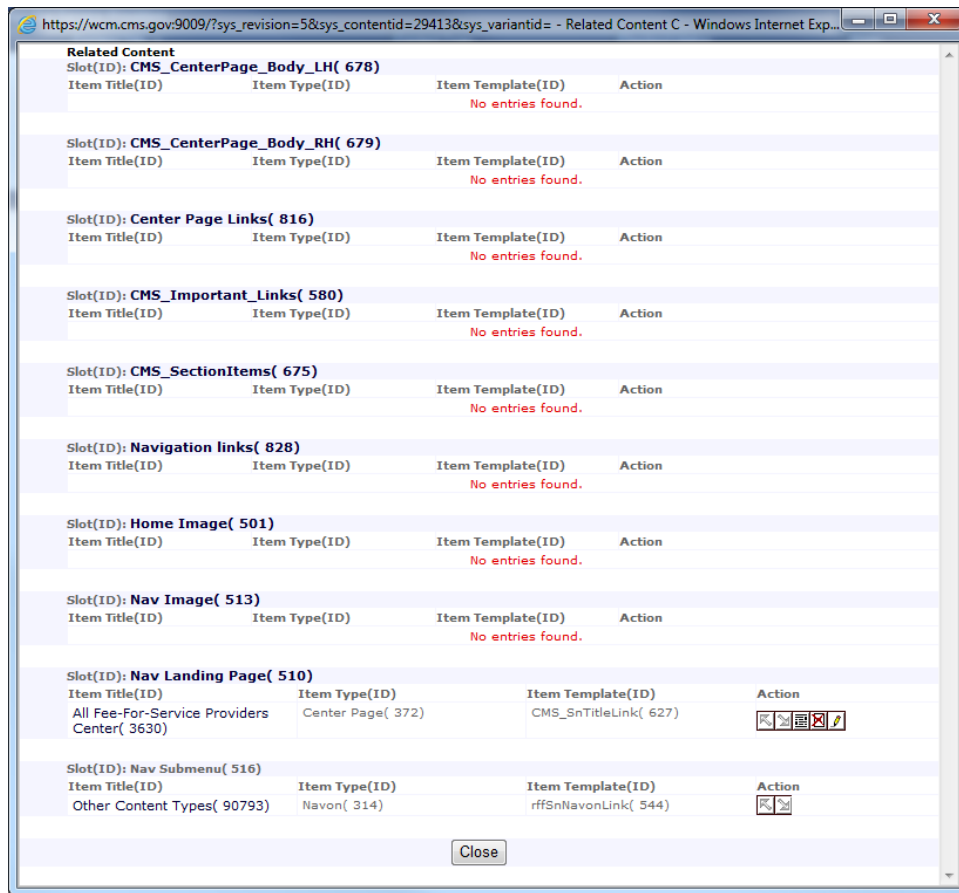


Figure 17: Navon – Active Assembly Table Editor content window

3.16 Special Processing

This section provides specific guidelines on how to create certain types of content items. This applies to the following:

- [AMA or AHA License](#) (external link)
- [MLN Matters Articles and Special Edition Articles](#) (download, dynamic list item)
- [Regulations](#) (dynamic list item, download, external link)
- [MLN Connects](#)
- [Spotlight or Blue Box](#)
- [HTML files](#)
- [Performance Data](#) (images, section page)

3.16.1 AMA/UB-04 or AHA Agreement/License Link

Some download items require either an AMA or AHA agreement linked to it before it can be downloaded. AMA agreements are usually used for Physician and Hospital Outpatient files. AHA agreements are used for OPSS Revenue Code files. AMA or AHA agreements are usually

created after a download has been created as you will need the name of the download in the “External Link Path”.

Please follow the procedure below if you are required to have an AMA or AHA agreement linked to a Download:

1. Create the download following the instructions in [Section 3.4](#).
2. Follow the instructions in [Section 3.6.2](#) for creating an External Link.
 - a. To identify AMAs/AHAs from other external links, the “System Title” usually begins with either “AMA-License-” or “AHA-License-”.
 - b. In the field “External Link Path,” enter the URL as: “/apps/**ama**/license.asp?file=/FILEPATH/FILENAME.EXT” or “/apps/**aha**/license.asp?file=/FILEPATH/FILENAME.EXT”. (**Example:** /apps/ama/license.asp?file=/Medicare/Medicare-Fee-for-Service-Payment/HospitalOutpatientPPS/Downloads/CMS-1601-P-Cost-Statistics.zip)
3. Once the AMA or AHA agreement or license has been created, it can then be added to the Related Links section of a page.
4. Follow the instructions in [Section 3.3.1](#) to add the External Link to a page. This would be in place of the download. **Note:** *Do not put both the Download and the AMA/AHA agreement on the page. The AMA/AHA license will redirect the user to the download once they have accepted the agreement.*

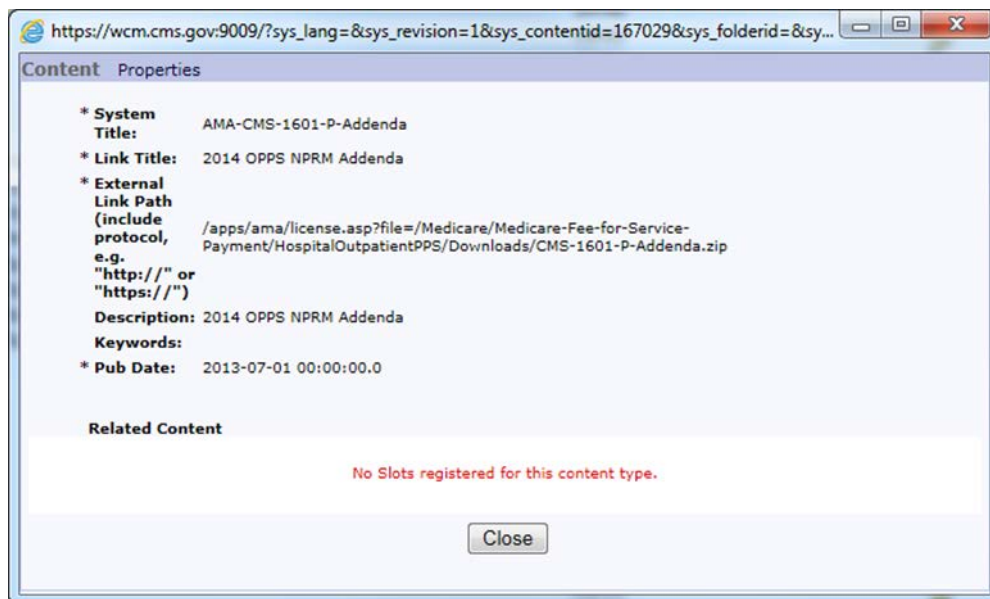


Figure 18: AMA License (external link) example

3.16.2 MLN Matters Articles and Special Edition Articles

MLN Matters Articles and Special Edition articles are posted to the web as downloads in dynamic list items. One or more PDF file(s) usually accompany a request to post a MLN or Special Edition article.

Follow these guidelines when posting either a MLN Matters or Special Edition article:

1. Save the PDF on your hard drive or network drive and examine the PDF for Section 508 Compliance.
2. Go to the MLN Matters Article Folder under the Medicare Learning Network Folder (//Sites/CMSGOV/Outreach & Education/Medicare Learning Network (MLN)/MLNMattersArticles/Downloads).
3. Follow the instruction on how to create or update a download item in [Section 3.4](#) or [Section 3.5](#). If creating a new download item:
 - a. Make sure to use the MLN Matters Article number or Special Edition number in the “System Title” and “Title” (*Example: MM8524 or SE1332*).
 - b. Add the title of the MLN Matters or Special Edition Article in the description and key words fields.
4. For NEW items, after the download item is created and submitted for approval; create or update the corresponding dynamic list item (also referred to as the List Detail Page) that it belongs to.

MLN Matters and Special Edition Articles are posted to the Transmittals page. Depending on which article you are requested to post, will determine whether or not you create a new dynamic list item or just update an existing dynamic list item.

3.16.2.1 New Special Edition

All **Special Edition** articles are posted independently. If a dynamic list item does not already exist for the Special Edition article, follow guidelines below for creating a new one:

1. Go to the Transmittals folder located at: //Sites/CMSGOV/Regulations & Guidance/Guidance/Transmittals
2. Navigate to the appropriate year subfolder (*Example: 2014 Transmittals Items*)
3. Follow the instructions in [Section 3.7](#) to create the dynamic list item.
 - a. Make sure to use the Special Edition number in the “System Title” and “Title” (*Example: SE1332*).
 - b. Add the title of the Special Edition Article in the description and key words fields.
 - c. Note: Do not enter an Issue Date. That field is for OSORA.
4. Follow the instructions in [Section 3.3.1](#) for adding the download to the dynamic list page.
5. When all editing is complete, don't forget to submit the item for approval.

3.16.2.2 New MLN Matters

New MLN Matters articles are usually posted to an existing Transmittals page. Follow these guidelines when posting new MLN Matters Articles:

1. Open the MLN Matters Articles to find out what the transmittal number is (*Example: R2899CP*).
2. Go to the Transmittals folder located at: //Sites/CMSGOV/Regulations & Guidance/Guidance/Transmittals
3. Navigate to the appropriate year subfolder (*Example: 2014 Transmittals Items*)
4. Find the Dynamic List Item which is the same as the transmittal number in the MLN Matters Article (*Example: R2899CP*). (Note: Some MLN Matters Articles pertain to multiple transmittals. In those cases, the article should be placed on all of the associated transmittal dynamic lists.)

5. Edit the Dynamic List Item and populate the “MM Article #” and “MM Article Release Date” fields with the information contained in the MLN Matters article. The “MM Article Release Date” is the date the MLN Matters Article is being entered into Percussion. (**Note:** Do not enter an Issue Date. That field is for OSORA)
6. Click “Update” then Click “Close”.
7. Right click the item again and select “*Active Assembly Table Editor*”. Follow the instructions in [Section 3.3.1](#) for adding the download to the dynamic list page.
8. When all editing is complete, don’t forget to submit the item for approval.

3.16.2.3 Revised MLN Matters & Special Edition Articles

Revised MLN Matters and Special Edition articles need to replace the Download with the updated file. Refer to [Section 3.5](#) for how to update an existing Download. You will also need to update the “*MM Article Revised Date*” on the corresponding dynamic list item (also referred to as the List Detail Page) for that MLN Matters article.

To find which dynamic list item the download resides, right click on the download item itself and select “*Impact analysis*”. A pop-up window will appear with a tree diagram showing where the download resides (See [Figure 19](#) below). In some cases, as in this example, the download resides on multiple pages or dynamic list items. You will need to update each page or dynamic list item that has the download. Sometimes, the revised article is associated with a new transmittal. You will also need to post the article on the new transmittal dynamic list in addition to the existing transmittal dynamic lists that already link to the article.

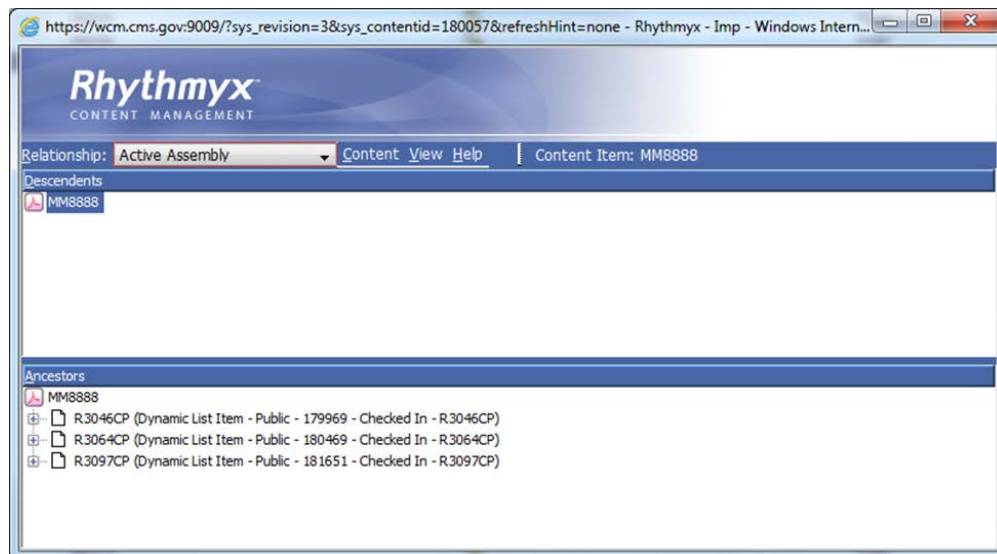


Figure 19: Impact Analysis pop-up box

3.16.3 Federal Regulations

Federal Regulations are issued on The Office of the Federal Register's website twice a day; once at 8:45am and once at 4:15pm. Sometimes an additional posting is done at 11:15am. Most Medicare Fee-for-Service Regulations are usually posted at the 4:15pm timeslot so any Regulations related requests from analysts will have the contents made public AFTER the 4:15pm display at the Federal Register. The initial listing on the Federal Register website is

sometimes referred to as the “Display Copy” for public inspection and will publish in the Federal Register on the date listed. Regulations are also referred to as the “Rule” (i.e. Final Rule, Proposed Rule, etc.). Most Regulations will be in the following format CMS-9999-X, where ‘9999’ is the Regulation Number and ‘X’ is the Rule type. *For example:* CMS-1607-P. The “P” indicates it is a Proposed Rule.

Here are the different Rule Types:

- P = Proposed Rule
- F = Final Rule
- FC = Final Rule with Comment Period
- CN = Correction Notice
- IFC = Interim Final Rule with Comment Period
- N = Notice
- NPRM = Notice of Proposed Rulemaking
- ANPRM= Advance Notice of Proposed Rulemaking

There are multiple steps involved when a Regulation is requested to post on the CMS.gov website. The request or information usually will come in a day or two before the Regulation actually is scheduled to be released. The analyst requesting the posting will usually provide all of the information needed to complete the task; however, the guidelines provided below will help to ensure the posting is complete.

Approximately 2-3 days before Regulation release date:

- ❑ **Track your Content:** Create a document (Word or Excel) using the templates to capture all content items and content IDs created for the Regulation posting and save it to the [Web Team Library](#) in SharePoint. This is to assist you in keeping track of all content items that need to be made public the day of the posting as well as allow others to know which items to approve to public in the event you are unavailable on the day of the Regulation release. A template for each format is also available on the [Web Team Library](#) under “Reg-Percussion-IDs-Template” (Word or Excel formats available). You can pick whichever format (Word or Excel) you feel comfortable using.
- ❑ **Prepare:** Check the dynamic list on which the regulation will be posted to see if it contains the proper year in the drop-down list. If a new year needs to be added; follow the instructions in [Section 9.1](#) for updating a dynamic list if you have this capability. If you do not have this capability, contact one of the [DPCT SMEs](#) for assistance or enter a JIRA ticket.
- ❑ Update the “Regulations & Notices” page for the appropriate provider type with the information provided by the analyst and check the content item in but DO NOT submit it for approval. Most are usually dynamic lists, some are just section pages. Please see [Section 3.7](#) for creating a new dynamic list item. The template language in italics below should appear in the white space of the appropriate Regulations & Notices List Detail page, above the “Downloads.” Modify the bracketed areas. The List Detail page can be created in advance of the display copy with any of the known information available, such as Regulation Number and Title.

*The **[Insert Rule Type]** went on display at the Office of the Federal Register’s Public Inspection Desk on **[Insert Display Date]**, and will be available until the regulation is published on **[Insert Publication Date]**. See **[CMS-9999-X]** in the “Related Links” section below.*

- ❑ **Downloads:** Most Regulations will also have a zip or PDF file that accompanies it. These are posted as downloads in the Download section of the dynamic list. Please see [Section 3.4](#) for creating a download and [Section 3.3.1](#) for adding a download item to a page.
- ❑ **Related Links:** All Regulations will have an external link to the Federal Regulation on the Federal Register website. Create an external link for the provider type in the Other Content Types folder.

See [Section 3.6.2](#) for creating external links. The “System Title” is usually the Regulation Number (i.e. CMS-1607-P). The Title is also the Regulation Number with either “Display Copy”, “PDF”, or “Text” appended to it. For example: *CMS-1607-P (Display Copy)*. The “External Link Path” is not generally known until the day the Regulation goes live on the Federal Register, so the standard procedure is to enter the Federal Register main URL

[“https://www.federalregister.gov/public-inspection”](https://www.federalregister.gov/public-inspection) as a placeholder.

- ❑ Once the external link is created, add it to the Related Links section of the dynamic list. See [Section 3.3.1](#) for adding a Related Link.
- ❑ Occasionally, there will be a request from DPRO or the analyst to update the Spotlight section on a Center page with the Regulation information. They will usually provide the language to post. If not provided, add a Spotlight to the appropriate Center page for the Display Copy and press release/fact sheet (if known) using the template language in italics below. This should appear as the top Spotlight on the appropriate Center page.

[CMS-9999-X](#) : [Insert Fee-for-Service Payment Regulation Title]. For more information, see the [Press Release](#) or [Fact Sheet](#). (Use the general hyperlink, unless a specific link is available.)

Morning of Regulation release date:

- ❑ Submit a high priority request to inform WNMG that we anticipate a regulation will be posted that day, and the time if known (i.e. after 4:15pm) through JIRA. See [Section 5.2](#) for entering High Priority requests in JIRA. Just let them know we may need their assistance by monitoring the publishing run/logs at 4pm and 6pm (or when necessary) and we want to ensure that no other manual runs are anticipated for that day and time. We have noticed that manual runs cause issues for publications.
- ❑ Ensure all of the content items are checked in.

Day of Regulation release:

- ❑ The CM analyst should confirm with you that the Regulation will go on display. You should receive or request an email from the CM analyst, via OSORA, which contains OFR confirmation that the rule will go on display, the day and the time, and may include the publication date. Monitor the following website for the anticipated rule (usually at 4:15pm): <https://www.federalregister.gov/public-inspection>.
- ❑ Once the rule goes on display @4:15pm,
 - Note the Publication Date and update the dynamic list or section page with the “Publication Date”.
 - Click on the “PDF” file in the rule on the Federal Register website and capture the URL of the Regulation in the Federal Register.
 - Update the “External Link Path” field of the external link content item with the URL of the Federal Register PDF. (For example: http://www.ofr.gov/OFRUpload/OFRData/2014-08897_PI.pdf). Click “Update” then “Close” and submit the item for approval.
 - Using the Word or Excel document containing all the content items and content IDs, begin submitting items for approval to the Section Editor/Senior Editor. If you are the Section Editor/Senior Editor, approve the items to public.

Note: If all content is pushed public prior to 4pm, content **may** appear on the website around 4:30pm. If content is approved after 4pm, it may not appear on the website until 6:30pm or later barring any server issues.

- ❑ Check that the pages are updated correctly.
- ❑ Email the analyst to let them know the content has been published.
- ❑ Update the JIRA ticket that the web update is successful or not, if there any issues. They will ask for IDs and URLs and they may have to submit a manual publishing run.

Follow up AFTER Regulation release:

- ❑ Mark your calendar with the publication date. On the publication date, update or create the external links for the TXT and PDF versions from the [Federal Register](#). For example: CMS-1607-P (PDF) and CMS-1607-P (Text).
- ❑ Add the TXT and PDF versions to the Related Links section of the “Regulations & Notices” page for the appropriate provider type.
- ❑ Remove the Display Copy from the Related Links section as the link for these are usually no longer valid once the published version is available. You can usually reuse/repurpose the Display copy link with the published PDF version.

Please Note: The following dynamic lists may need a new DropDown field (ie. Fiscal Year, Calendar Year) as noted below:

Medicare – FFS Payment – Acute Inpatient PPS

(**Acute Inpatient PPS needs a New Dynamic List created for new Regulations)

- Wage Index Files (Fiscal Year)
- Acute Inpatient – Files for Download (Type of File)
- Historical Impact Files for FY 1994 through Present (Fiscal Year)
- IPPS Regulations & Notices (Year)

Medicare – FFS Payment – Home Health PPS

- Home Health Prospective Payment Systems Regulations & Notices (Year)

Medicare – FFS Payment – Hospital Outpatient PPS

- Hospital Outpatient PPS Regulations & Notices (Year)
- Addendum A and Addendum B Updates (Year)

Medicare – FFS Payment – Long-term Care Hospital PPS

- LTCHPPS Regulations & Notices (Payment Year)
- LTCHPPS Historical Impact Files (Payment Year)

Medicare – FFS Payment – Physician Fee Schedule

- PFS Federal Regulations & Notices (Calendar Year)
- PFS Relative Value Files (Calendar Year)
- PFS National Payment Amount File (Calendar Year)

Medicare – Billing – Therapy Services

- Studies and Reports (Type of Report)

Medicare – Coding – HCPCS Release & Code Sets

- Alpha Numeric HCPCS (Year)

3.16.4 MLN Connects

The Division of Provider Relations & Outreach (DPRO) posts a weekly newsletter (formerly known as Provider eNews) on the web site at <http://www.cms.gov/Outreach-and->

[Education/Outreach/FFSProvPartProg/Provider-Partnership-Email-Archive.html](#). The newsletter, currently called “MLN Connects” is contained in the body of a list detail page and has a link to the PDF version of the newsletter at the end of the table of contents. Below are the steps for adding a new MLN Connects item in Percussion.

Table 19: Steps for adding the weekly MLN Connects Newsletter

Step #	Description
1	Check the PDF version of the MLN Connects newsletter for 508 compliancy.
2	Navigate to the Downloads folder on the left hand menu in Percussion: <i>Sites > CMSGOV > Outreach & Education > Outreach > FFSProvPartProg > Downloads.</i>
3	Right click the folder and select <i>New Item > Download</i> . A pop-up window will appear.
4	Enter the “System Title” using the following format: YYYY-MM-DD-eNews (example: 2016-07-10-eNews).
5	Enter the “Title” as “View this edition as a PDF”.
6	Click on the “Browse” button for the “File” and select the PDF file for the MLN Connects.
7	Enter the “Description” as “MLN Connects for <Date>” In this example, it would be “MLN Connects for July 10, 2016”
8	Click on the “Insert” button in Percussion to add the new download, and close the screen.
9	Right click the new item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
10	(Optional) Enter a description in the top field. (Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</i>
11	Click <i>Submit</i> . This will put the item in a “Section Editor Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
12	Section Editors: For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public: Right click the download item and select <i>Workflow > Direct to Public</i> . Enter Workflow Comments (optional) in the top field. Click <i>Direct to Public</i> .
13	Navigate to the <i>Provider Partnership and Email Archive</i> folder on the left hand menu:

Step #	Description
	<i>Sites > CMSGOV > Outreach & Education > Outreach > FFSProvPartProg > Provider Partnership Email Archive Items.</i>
14	Locate the eNews Template called <i>zz-eNews-Template</i> . Right click the template and select <i>Create -> New Copy</i> . This will create a new DRAFT copy of the template that you can Edit.
15	Edit the copy of the eNews template (<i>Right click -> Edit</i>). Change the "System Title" using the following format: <i>YYYY-MM-DD-eNews</i> (example: 2016-07-10-eNews).
16	Enter the "Title" as " <i>MLN Connects for <Date></i> ." In this example, it would be "MLN Connects for July 10, 2016." For Special Edition articles, use the title language provided.
17	Enter the "Date" and "Subject" for the MLN Connects. The date will be in the format <i>YYYY-MM-DD</i> and the Subject should be the same as the "Title". In this example, it will be "MLN Connects for July 10, 2016."
18	The MLN Connects logo has already been added as part of the template for you. NOTE: The logo image is located in the <i>Sites > CMSGOV > Outreach & Education > Outreach > FFSProvPartProg > Other Content Types</i> folder, in case you need to navigate to it.
19	Place your cursor in the "Body" of the dynamic list item, at the end the image (to the right of the image).
20	Hit the "Enter" key to move your cursor to the line after the image.
21	Open the MLN Connects document that DPRO sent you in Word. In the Word menu, click on <i>Select > Select All</i> to highlight the contents of the document.
22	Click on "Copy" in the menu to copy the entire newsletter.
23	Place your cursor on the line after the MLN Connects logo in Percussion and click on the "Paste" button.
24	Make the date above the table of contents center aligned, un-bold it, and <i>set it to Heading 3</i>
25	Place your cursor after the table of contents in the body of the newsletter. Select <i>Insert -> Inline Template</i> from the menu. For Special Edition articles that have no table of contents, place the PDF after the paragraph.
26	Click on the "Search" tab and search for the PDF file name " <i>YYYY-MM-DD-eNews</i> ".
27	Click on the file name to select the download. Select the " <i>Title Link File Icon Snippet</i> ", template option. You should see "View this edition as a PDF [PDF, xxKB]" in the Template Preview area of the screen.
28	Change the main section headers (News & Announcements, Provider Compliance, etc.) from Heading 2 to Heading 1.

Step #	Description
29	The Horizontal bar and footer have been added to the template for you along with the footer logo.
30	To remove the white bar with ">" at the top of the page, remove the <p> before and the </p> after the very first image's HTML code in View-> Source Code
31	<p>Special process for External Links.</p> <ul style="list-style-type: none"> • Locate all external links in the eNews that do not end in ".gov" or is not a HHS agency web link; with exception of the footer. • Search for these links in the Other Content Types folder or do a global search at the cms.gov level folder (See Section 12.3 for tips on how to search for external links). <ul style="list-style-type: none"> ◦ If found, you will be using these external link content items instead of the inline link that you copied and pasted. Note the Content ID and location. ◦ If you can't find them or they don't exist, create the External Link content item for each (non gov) external link in the eNews. Note the Content ID and location. • Replace the non gov/non HHS external link with the external link content item in the Body of the page by highlighting the link, right click the highlighted link and select <i>Insert -> Inline Template</i>. Select the content item to insert that you noted earlier. • The external link should now have an arrow icon next to it indicating that it's an external link. <p>(Note: You don't have to do this for the footer as this has already been done for you in the template.)</p>
32	<p>(Optional) Enter a description in the top field, such as "MLN Connects for July 10, 2018".</p> <p>(Optional) Enter keywords from the web request.</p>
33	Click on the "Insert" button in Percussion to add the new dynamic list detail page and close the screen.
34	<p>Preview the page; right click on the new content item, click <i>CMS Preview > CMS Dynamic List Item Html PG</i>.</p> <p>Make sure all bullets are indented and numbered lists are correct. Check spacing before article headlines. And make sure ALL hyperlinks work on the page.</p>
35	Right click the new item and select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
36	<p>(Optional) Enter a description in the top field, such as "MLN Connects for July 10, 2018".</p> <p>(Optional) Enter keywords from the web request.</p> <p>(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.</p> <p>Note: If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</p>
37	Click <i>Submit</i> . This will put the item in a "Section Editor Review" state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent

Step #	Description
	to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
38	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public:</p> <p>Right click the download item and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (optional) in the top field. Click <i>Direct to Public</i>.</p>

3.16.5 Spotlight or Blue Box

Sometimes we get requests to call attention to a paragraph or item on a page with a “blue box”. Rather than use a table to display the “box” which will cause 508 issues, we can use inline cascading style sheets instead of the tables. This will have to be done in the Source Code of the Body section of the page using *Tools -> Source Code*.

Use the following code to perform this:

```
<p style=" border: 2px double blue; padding: 1em;">[TEXT]</p>
```

Here’s an example of the code and display on the page:

Code:

```
<p style=" border: 2px double blue; padding: 1em;">Attention All Medicare Beneficiaries!!!</p>
```

Display:

Attention All Medicare Beneficiaries!!!

3.16.6 HTML Files

Occasionally, we get requests to load HTML files to Percussion. Some MLN Products are being created/converted to HTML files. Also, the ICD-10 section of CMS.gov has a Definitions Manual that is created by an outside contractor. With Percussion we do not have the ability to add or update HTML files, so we need to open a JIRA ticket to have them loaded by the JIRA contractor.

3.16.6.1 New HTML Files

To add new HTML files, we need to provide the file directory and the new index page URL in the JIRA ticket.

For example, if this was for a new MLN Product:

<https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/New-folder-name/>

<https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/New-folder-name/Name-of-HTML-document.html>

NOTE: We decide and provide the “New-folder-name.” We do not modify the “Name-of-HTML-document” filename.

Open a service request in JIRA (See [Section 5](#)) and provide the following details, as well as attach the Zip file to the request. See the sample request below:

Site: CMS.gov
Tool or Service: Percussion
Component: CM
Priority: Medium - Interferes with my duties, but work can continue

Hello,

Please create a new directory and upload the contents of the attached ZIP file there.

The new directory should be:

<https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/SNF-PPS/>

By uploading the files in the ZIP, the index page should become:

<https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/SNF-PPS/SNFAssessHTML.html>

Thanks for your help and please feel free to contact me with any questions.

[ZIP FILE attached]

Once the files have been uploaded by the JIRA contractor, you can then proceed to create the external link content item (See [Section 3.6.2](#)).

NOTE: New HTML postings will be sent by the JIRA contractor to WNMG for approval prior to being processed. This includes forwarding the files for a security approval. This extra step may cause a delay in posting. Revised HTML file postings should not go to WNMG for approval.

3.16.6.2 Revised HTML Files

To replace an existing HTML page, open a JIRA ticket and enter the same information for the Site/Tool or Service/Component/Priority fields as you would a new HTML product. Include in the description the file path of the existing HTML URL which is in production. Make sure you indicate in the request that this is a revision to an existing page, so contents of the file attachment should be used to replace existing content. Once the files have been replaced, you can notify the requestor that the task has been completed.

3.16.7 Performance Data

When we get requests to update the [Performance Data](#) page for DCPC; it involves updating tables, images, and text content. The updates are usually provided in a Word document. The steps below outline how to update this particular page.

Table 20: Update Performance Data

Step #	Description
1	Save each of the four images (graphs) from the Word document to your desktop by right clicking on each one and select "Save as Picture...". It should default to a .png file format.
2	<p>Update the image files in Percussion. See instructions in Section 3.6.1 for how to update an image file.</p> <p>The image files can be found under <i>Sites > CMSGOV > Medicare > Medicare Contracting > FFSProvCustSvcGen > Other Content Types</i>. The filenames of the images are as follows:</p> <ul style="list-style-type: none"> • Telecom-Performance-Chart (should be around 500 height, 780 width) • Provider-Written-Inquiries-Pie-Chart (should be around 450 height, 450 width) • Provider-Phone-Inquiries-Pie-Chart (should be around 450 height, 450 width) • Provider-Outreach-Education-Pie-Chart (should be around 450 height, 450 width)
3	Once the images have been updated, Select <i>Workflow > Submit</i> . The Submit Content pop-up will appear.
4	<p>(Optional) Enter a description in the top field.</p> <p>(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.</p> <p>Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</i></p>
5	Click <i>Submit</i> . This will put the items in a "Section Editor Review" state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
6	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the items to a "public" state. To approved the items to public:</p> <p>Right click the item and select <i>Workflow > Direct to Public</i>. Enter Workflow Comments (optional) in the top field. Click <i>Direct to Public</i>.</p>
7	<p>Navigate to the Performance Data folder and update the text on the page as requested.</p> <p>Make sure to update headers and footers of the graphs on the webpage with the most current dates and topics.</p> <p>Once all updates have been made to the page; right click on the item and select <i>Workflow > Submit</i>. The Submit Content pop-up will appear.</p>
8	(Optional) Enter a description in the top field.

Step #	Description
	(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons. Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</i>
9	Click <i>Submit</i> . This will put the items in a “Section Editor Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
10	Section Editors: For those users who also have Section Editor rights, you may also approve the items to a “public” state. To approved the items to public: Right click the item and select <i>Workflow > Direct to Public</i> . Enter Workflow Comments (optional) in the top field. Click <i>Direct to Public</i> .

3.17 Top Navigation

The section explains how to create and maintain the Top Navigation function in Percussion. This currently only applies to the [MLN section](#). It is the secondary top navigation with blue buttons, not the global ‘Medicare, Medicaid/CHIP, etc.’ yellow button top navigation.

3.17.1 CMS Sub Site Page

Section Pages do not work with Top Navigation, so you must use CMS Sub Site Page as your main page.

The creation steps for a CMS Sub Site Page are identical to a [Section Page](#), except for Step 2 you select “CMS Sub Site Page” instead of Section Page.

CMS Sub Site Pages are comparable to Section Pages regarding how you would edit a page. The biggest differences between them is what fields are offered in the Related Content. These pages do not have Downloads or Related Links fields, and cannot host dynamic lists or the left Navon. They do allow hosting the top navigation, bottom navigation (MLN used this for a “Contact Us” page button) and Left Rail (hosts List Widgets on the left side of the page).

Note: Hyperlinks are not automatically underlined on these and List Widgets. WNMG and JIRA told us to use a workaround: adding code directly into the HTML. The HTML code you add can go right after the link and before the text: `` and ``

Example: `MLN Matters Articles`

3.17.2 CMS Sub Site Top Nav

This is the actual top navigation item. To populate this with buttons, you add ‘CMS Sub Site Top Nav Items’ as related content, in slot ‘slotCMSSubSiteNavItems’. These will appear as buttons in the top-to-bottom order. Figure 20 below shows a screenshot of a populated Top Nav content.

To add Top Nav to a page, edit a CMS Sub Site Page and add your Top Nav content under the Related Content slot ‘slotCMSSubSiteTopNav’.

Tip: This is built and sized to have 6 Items; if you use less, the buttons do not enlarge to fill extra space, they are centered and there are gaps on both sides of the bar.

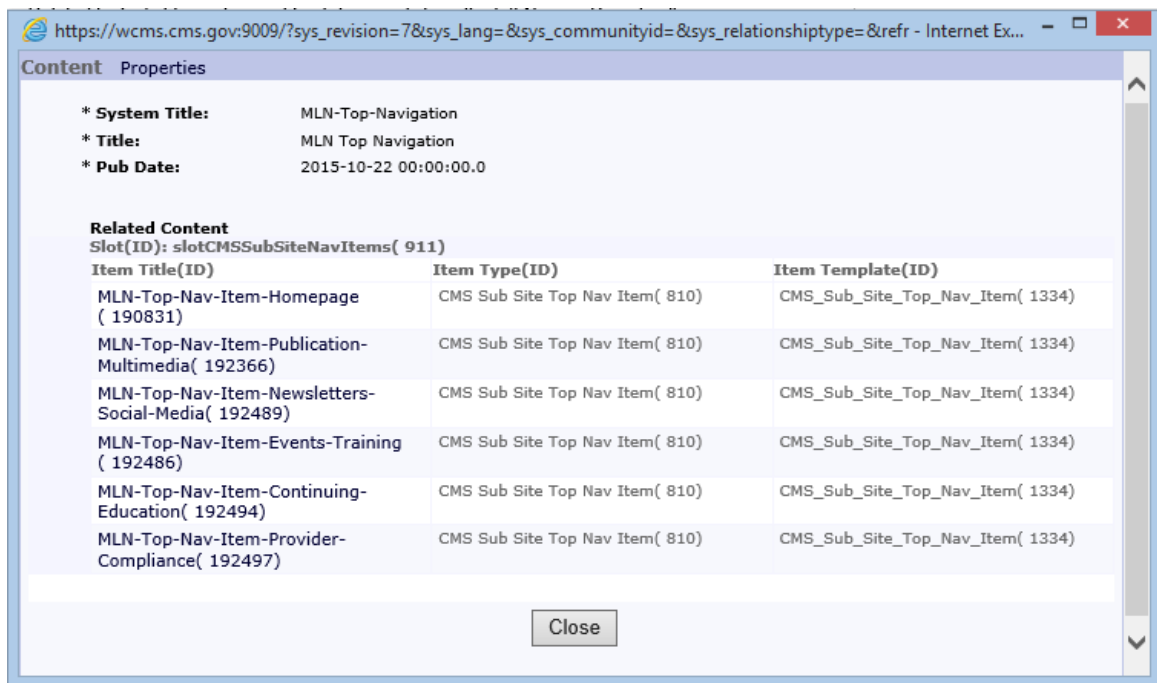


Figure 20: CMS Sub Site Top Nav

3.17.3 CMS Sub Site Top Nav Item

These are the links/buttons of the top navigation. There are two sections in here that we use: "CMSSubSitePageLink" which is the main link, the one that shows permanently on the top navigation, and the "CMSSubSiteNavItem" which builds the drop down options when you hover your mouse over the button. Currently the only content item that can be used here is CMS Sub Site Page. It will pull the page title as the text, you can't declare it independently.

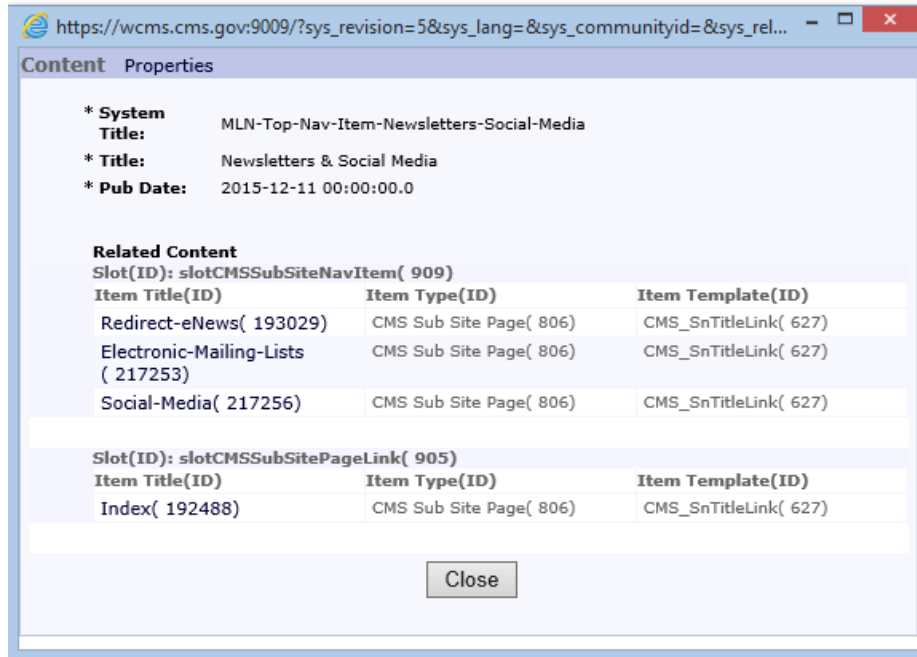


Figure 21: CMS Sub Site Top Nav Item

3.17.3.1 Establishing an automatic redirect using HTML

Since CMS Sub Site Pages can't have dynamic lists, one work around is the use of redirects. An in-effect solution to this was creating a CMS Sub Site Page that lives to be an option as a CMS Sub Site Top Nav Item, but just redirects you to a section page with a dynamic list. Keep in mind the page you land on will not be able to host the top navigation.

Code you would add to the CMS Sub Site Page that is being used for the top navigation button:

```
<div class="rxbodyfield">
<p><script type="text/javascript">
    window.location.href = "https://www.cms.gov/Outreach-and-Education/Medicare-Learning-Network-MLN/MLNProducts/MLN-Multimedia.html"
</script></p>
<p>Redirect to <a
href="https://wcms.cms.gov:9009/Rhythmyx/assembler/render?sys_revision=8&#38;sys_
_context=0&#38;sys_authtype=0&#38;sys_variantid=907&#38;sys_contentid=193109"
sys_dependentvariantid="907" sys_dependentid="193109" inlinetype="rxhyperlink"
rxinlineslot="103" sys_relationshipid="1052073" sys_variantid="907"
sys_contentid="193109">MLN Multimedia</a></p>
</div>
```

This is the URL to the page you want to redirect to, you must use an actual URL not the Percussion version.

This is a 'fail-safe' should the page not automatically redirect. This will provide text on the CMS Sub Site Page saying "Redirect to XXX" with a link to the page you want to redirect to.

Example: From the [MLN Homepage](#), if you hover your mouse over the Publications & Multimedia top navigation and move it down to Publications, you can see the URL path is actually “.../MLNGenInfo/Redirect-Publications.html”.

3.17.4 List Widget

These are the content sections on the left side of the page. You can add multiple widgets to a single page as was done for the [MLN Homepage](#). View the previous section on creating [List Widgets](#).

List Widgets are added to a CMS Sub Section Page under the Related Content slot ‘slotCMSSubSiteLeftRail’. After selecting your List Widget for this slot, you are prompted to select a template; CenterPage List Widget or List Widget Siderail. For the MLN pages I used Siderail, it creates the box structure with the different colors and bold header. Centerpage has no border around the content.

Tip: Text is added extremely close to the left side of the box, almost on top of the border. I found that using bullets will indent the text but the bullet does not appear on the screen.

Tip: Paragraphs are not friendly in this box, the HTML code “<p> ...</p>” will create a gap between the header box and the body box (an actual space). This is another reason why I used bullets, or you can use Shift+Enter to create a new line of text.

Note: Underlining problem same with [CMS Sub Site Pages](#), you have to add it manually.

4. CMSnet

The information provided in this Section pertains to maintaining pages in CMSnet which is also known as the “Intranet”. These pages are internal to CMS and can only be viewed by CMS employees. The same roles and abilities defined in CMS.gov also apply here as well; however there is a minor difference in role names between CMS.gov and CMSnet. One difference is that the “Contributing Editor” in CMS.gov is known as a “Contributor” in CMSnet. The workflow will be slightly different as noted in the table below.

While most tasks performed in CMSnet are the same as CMS.gov, there are some slight differences when it comes to creating or updating content items within CMSnet. These differences are noted in the sections that follow.

You will notice that Center Pages and Dynamic Lists are not used in CMSnet.

Table 21: Differences between CMSnet and CMS.gov Workflow

Content Type Category	Main Content Types for Intranet	Main Content Types for CMS.gov
Pages	<ul style="list-style-type: none"> • Bucket • Component • Service 	<ul style="list-style-type: none"> • Bucket • Section
Downloads	<ul style="list-style-type: none"> • PDF, Zip, Microsoft Office file types** • Added inline 	<ul style="list-style-type: none"> • PDF, Zip • Added via “Downloads” slot
External Links	<ul style="list-style-type: none"> • Added inline or via “Related Resources” slot • No separate approval needed 	<ul style="list-style-type: none"> • Added via “Related Links” slot • Must be approved by Senior Editors

Content Type Category	Main Content Types for Intranet	Main Content Types for CMS.gov
Subfolders	<ul style="list-style-type: none"> Components are responsible for maintaining 	<ul style="list-style-type: none"> WNMG is responsible for maintaining

**Although Word documents are accepted in Percussion for CMSnet, we have implemented 508 standards on CMSnet that require Word documents be converted to PDF before posting to the Intranet.

4.1 Login for CMSnet

This section outlines the Percussion login procedure for maintaining pages in CMSnet. The screenshot and login steps are provided below.

Table 22: Login steps for CMSnet

Step #	Description
1	To access Percussion, go to the following URL: https://wcms.cms.gov:9049/
2	Under “Rhythmyx Application” on the left hand side, click “Rhythmyx”.
3	The Login screen for CMSnet will display. (See Figure 20)
4	Log in to Percussion with your user name and password. <i>Note: Your user name is your work email address. Your password is your network password.</i> <i>If you also had an IACS account, you will need to use the same password as your IACS account and not your network password.</i>

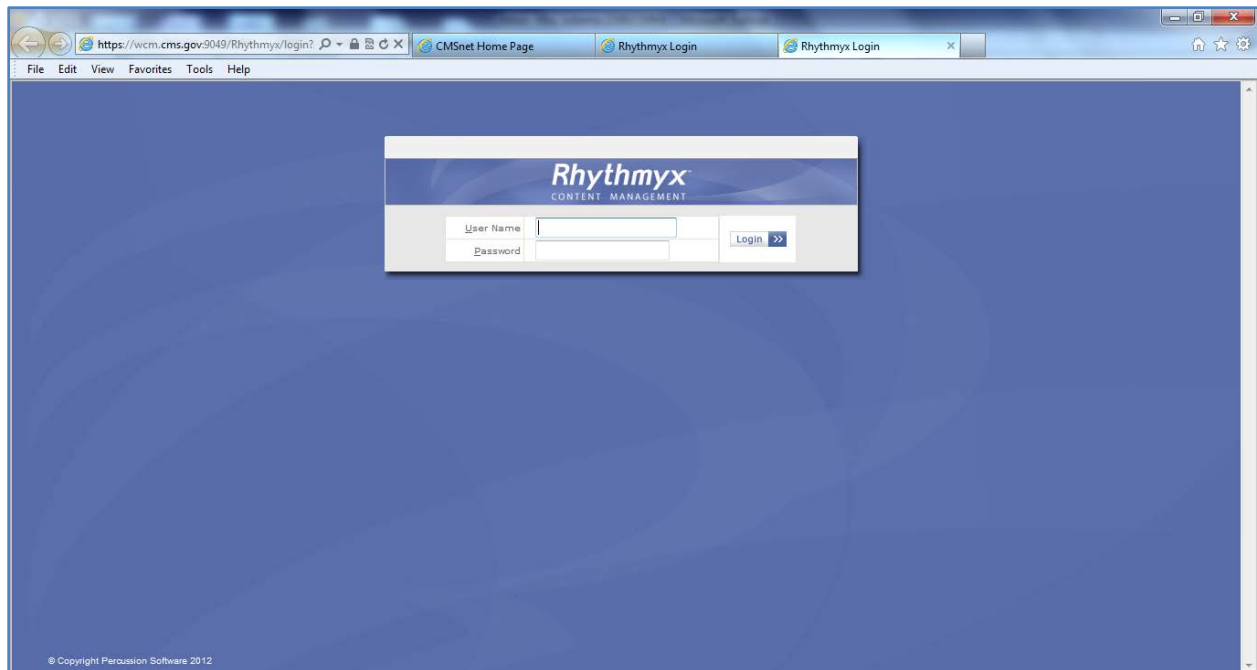


Figure 22: CMSnet Login screen

4.2 Service Page

Creating a Service Page on CMSnet is basically the same as creating a Section Page on CMS.gov. A Section Page is called a “Service Page” on CMSnet. The majority of pages on the Intranet are created using Service Pages. The navigation menu is displayed on the right on a Service Page. All fields are pretty much the same with the exception on Service Pages; you have the option to “Hide Right Navigation” at the bottom of the form. When you click the “Yes” box, this will hide the navigation menu on the page. In most cases you would leave this checkbox unchecked.

To create a Service Page, follow the same steps in [Section 3.2](#) to create a Section Page. Where it indicates *New Item > Section Page*, you would select *New Item > Service Page*. The rest of the steps are the same except when you submit the page, you would select *Workflow > Submit for Review*.

To update a Service Page, follow the same steps in [Section 3.3](#) to update a Section Page. Where it indicates *Workflow > Quick Edit*, you would select *Workflow > Move to Public Draft*. After you have completed your updates and checked the page back in, submit the page for approval by selecting *Workflow > Submit for Public Review*.

Section Editors would select *Workflow > Back to Public* to put the page back in a “public” state.

4.3 Downloads, External Links, Images and List Widgets

The procedure for creating or updating downloads, external links, images and list widgets are the same as those for CMS.gov. Please refer to [Sections 3.4, 3.5, 3.6 and 3.9](#) for instructions on how to perform each task. You may notice there may be fewer fields to complete on the different forms in CMSnet.

While List Widgets are most commonly used on Center Pages in CMS.gov, List Widgets are used slightly differently in CMSnet. List Widgets are used on Component pages to create various list types.

External Links are links to websites outside of the CMS intranet and are included on Service Pages under the “Related Resources” SlotID in the AATE window.

4.4 Promote a Previous Version

The procedures for promoting a previous version of a content item in CMSnet are the same as the ones for CMS.gov. Please refer to [Section 3.10](#) for more information.

4.5 Archive or Revive Content items in CMSnet

The procedure for archiving any item in CMSnet is similar to CMS.gov. The difference here would be to select *Workflow > Expire*. There is no interim step to submit the item for expiration to a Section Editor. Please see [Section 3.11](#) for how to archive and [Section 3.12](#) for how to revive.

After an item is “archived”, it can be “revived” by selecting *Workflow > Revive* which will put the item back in a “Draft” state for editing. The only other option in CMSnet is *Workflow > Checkout* which will keep the item in an “Archive” state but allow you to edit the item. Once the item is checked back in, it will remain in an “archive” or “draft” state until the item is approved “Back to Public” by the Section Editor.

4.6 Update a Navon in CMSnet

The procedure for updating a Navon in CMSnet is very similar to CMS.gov. The main difference is to select “*Right Navigation Pages*” when adding a new page to the Navon. This will add the new page to the right navigation menu. Please refer to [Section 3.14](#) for more information about Navons.

4.7 Other Content Types

There are some other content types used in CMSnet that are not used in CMS.gov. They are identified below:

- *Component Page*: These are the landing pages for Components. They are similar to the “Overview” or “Index” page of a main section on CMS.gov.
- *Quick Access*: These are used on Component pages to create lists with icons.
- *Video*: Both embedded and YouTube pop-up options are available.
- *Badge*: These are used for feedback and is usually included on a Service Page under the “Feedback” SlotID in the AATE window.

4.8 Internal Standards for CMSnet

In order to maintain consistency among the Center for Medicare web pages, the following standards have been created:

Table 23: 508 Standards for CMSnet

Content Type Category	Conversion Type for CMSnet	508 Compliancy Check
Microsoft Word	PDF	Run accessibility checker in Adobe Acrobat, view TouchUp Reading Order to see how items are defined, fix any elements that have been defined incorrectly
Microsoft PowerPoint**	PDF or ZIP file with PowerPoint and Text Equivalent File	See above for PDF file; Compare PowerPoint to Text file to make sure that all information that is conveyed on the PowerPoint is present in the Text file
Excel	ZIP with Excel and Text Equivalent File (.txt) or CSV (.csv)	Compare Excel to Text file(s) and make sure that there is a separate text file for each tab on the Excel spreadsheet; Ensure that all information that is conveyed on the Excel file is present in the Text file(s)
Audio	MP3 file with Written Transcript (MP3 file is loaded onto the multimedia server)	Compare Audio file with Written Transcript to make sure that all information on the Audio file is present in the Written Transcript
Video	MP4 file with Open Captioning	Have the video loaded onto the multimedia server at http://media.intranet.cms.gov/videos/ . In Percussion, create a new Video item under the "Other Content Types" folder. Add the video item to a component/service page using the inline template. Preview the page and make sure that the video plays and contains captioning.

** A 508 PowerPoint Template has been created by DPCT and made available on CMSnet at <http://intranet.cms.gov/Component/CM/PCG/downloads/Section-508-PPT-Template.zip>. The template is also available in the [Web Team Library](#) on SharePoint.

4.9 Special Processing

4.9.1 Adding or Updating MP4 Videos

In order to post a mp4 video, we must first open a JIRA ticket to have the file loaded onto the multimedia server. Please see [Section 5.1](#) for instructions on how to open a JIRA ticket. Once the video has been uploaded to the multimedia server, an external link is created to the mp4 video. Please follow the procedure below when you receive a request to post a mp4 video.

Table 24: Steps for adding or updating .mp4 videos

Step #	Description
1	Check the video for closed captioning. See <i>Table 23: 508 Standards for CMSnet</i> in Section 4.8 .
2	<p>Submit a JIRA ticket (See Section 5.1) to upload a file/video to the multimedia server.</p> <p>Request the file to be uploaded to the following location: http://media.intranet.cms.gov/videos/.</p> <p>Attach the file to the ticket. If the file is too large to attach (over 10MB), you can place the file on the network drive at H:\WPMGMedia\CM PCG Videos. Include the name of the file and file location on the H drive in the JIRA ticket.</p>
3	<p>Navigate to the appropriate folder on the left hand menu in Percussion:</p> <p>Example: <i>Sites > INTRANETCMSGOV > Component > CM > CM-Seminar-Series > Other Content Types</i>.</p>
4	<p>If adding a NEW .mp4 video, go to Step 5.</p> <p>If updating an existing .mp4 video, go to Step 6. *Note: <i>It is rare to update an .mp4 video in Percussion unless the video file name or location has changed.</i></p>
5	<p>In the Component's folder under <i>Other Content Type</i>, right click and select <i>New Item -> MORE -> Video</i>.</p> <p>Enter the "System Title" (Example: "CM-Seminar-May-2015").</p> <p>Enter the "Title" (Example: "Video Recording").</p> <p>Enter the Video URL that you provided in the JIRA ticket. (Example: http://media.intranet.cms.gov/videos/May-19.mp4)</p> <p>Once all fields have been populated, Click "<i>Insert</i>".</p> <p>Click "<i>Close</i>" and go to Step 8.</p>
6	<p>In the Component's folder under <i>Other Content Type</i>, right click the video to be updated and select <i>Workflow > Move to Public Draft</i>. A pop-up window will appear.</p> <p>(Optional) Enter a basic description of what will be updated in the Workflow Comments box in the pop-up window. This can be left blank.</p> <p>Click "<i>Move to Public Draft</i>".</p>
7	<p>Right click the video item again and select "<i>Edit</i>" to edit the content item.</p> <p>If the .mp4 file name or location has changed, you can updated the "Video URL" field with the new information.</p> <p>Click "<i>Update</i>".</p> <p>Click "<i>Close</i>".</p>

Step #	Description
8	Select <i>Workflow > Submit for Review</i> . The Submit Content pop-up will appear.
9	<p>(Optional) Enter a description in the top field.</p> <p>(Optional) Enter the email addresses of the CMS approvers in the bottom field, separated by semicolons.</p> <p>Note: <i>If no email address is entered, make note of the Content ID number for the item that was created to send to the Section Editor.</i></p>
10	Click <i>Submit</i> . This will put the item in a “Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
11	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public:</p> <p>Right click the content item and select <i>Workflow > Return to Public</i>. Enter Workflow Comments (optional) in the top field. Click <i>Return to Public</i>.</p>
12	<p>If adding a NEW .mp4 video, continue to Step 13.</p> <p>If updating an existing .mp4 video, you may STOP here.</p>
13	<p>Navigate to the appropriate Component folder on the left hand menu:</p> <p>Example: <i>Sites > INTRANETCMSSGOV > Component > CM > CM-Seminar-Series</i></p> <p>Create a new Service Page using the date of the video for the “System Title” so the format is “MM-DD-YY-Video” and the title “Video Recording – [Name of Presentation]”.</p> <p>If this is a CM Seminar Series page, insert the date, name, and speakers exactly as they are shown on the Archived Presentations page into the Body field. Add a space.</p> <p>Click <i>Insert -> Inline Template</i>, find the Video document you created earlier, and insert it as <i>Embed Video on Page</i>.</p> <p>(Optional) Add appropriate “Description” and “Keywords,”</p> <p>Click “<i>Insert</i>”.</p> <p>Click “<i>Close</i>”.</p> <p>Preview the Service Page to ensure that the video is embedded (it won’t play until file is uploaded from Step 2).</p>
14	<p>Select <i>Workflow > Submit for Review</i>. The Submit Content pop-up will appear.</p> <p>(Optional) Enter a description in the top field.</p>

Step #	Description
	Click <i>Submit</i> . This will put the item in a “Review” state until the Section Editor approves it. If an email was entered in the previous pop-up, a notification will be sent to the email address submitted. If no email was entered, notify the Section Editor approver(s) via email.
15	<p>Section Editors:</p> <p>For those users who also have Section Editor rights, you may also approve the item to a “public” state. To approved the item to public:</p> <p>Right click the content item and select <i>Workflow > Return to Public</i>. Enter Workflow Comments (optional) in the top field. Click <i>Return to Public</i>.</p>
16	<p>If this is for a CM Seminar Series page:</p> <p>Edit the appropriate “Archived-Presentations-201X” Service page.</p> <p>Remove the “Will be forthcoming” and use the <i>Insert -> Inline Template</i> button to make “<i>Video Recording - [Name of Presentation]</i>” a link to the Service Page you just created with the video on it.</p> <p>Click “<i>Update</i>”. Click “<i>Close</i>”.</p> <p>Preview the Section page and follow link to confirm.</p> <p>If everything is correct, Select <i>Workflow > Submit for Review</i>.</p> <p>Notify the Section Editor that the page is ready to be reviewed and approved to Public.</p> <p>If you have Section Editor rights, you may approve the item to a “public” state.</p>

4.9.2 Adding or updating You Tube videos

You Tube videos can be added to a page as External Links (reusable content) or it can be added straight to the page in the Body field as a hyperlink.

To add You Tube videos as External Links, see [Section 3.6.2](#) for how to create or update an external link. In the “External Link Path,” enter the full URL of the You Tube video. Always include the http:// or https:// in the external link path.

To add You Tube videos as links in the Body field, highlight the word that needs to be hyperlinked, then click on the “Insert/edit link” icon from the menu bar. In the URL field, enter the You Tube video URL and click “OK”.

4.9.3 AMA-ADA-AHA Medical Codes

CMS signed licensing agreements with the AMA, ADA, and AHA giving CMS internal staff limited use of CPT, CDT, and NUBC data codes and descriptors. These files are housed within CMSnet and in order to access a code set, CMS staff must accept the terms and conditions of

an association's licensing agreement. The link to the agreements are located on the bottom of the page at <http://intranet.cms.gov/Component/CM/Medical-Agreements/index.html>. After the user completes the agreement, they will receive an email with a link to a page containing the list of files.

When you receive a request to add a new code set, the following page(s) will need to be updated depending on the type of code set requested.

- **AMA:** <http://intranet.cms.gov/Component/CM/Medical-Agreements/AMA-CPT-Data-Files-Directory.html>
- **ADA:** <http://intranet.cms.gov/Component/CM/Medical-Agreements/ADA-CDT-Data-Files-Directory.html>
- **AHA:** <http://intranet.cms.gov/Component/CM/Medical-Agreements/AHA-NUBC-Data-Files-Directory.html>

New or updated code sets are located at <http://intranet.cms.gov/Component/CM/Medical-Agreements/Downloads>. For instructions on how to add or update a Download, please refer to [Section 3.4](#) and/or [Section 3.5](#). For instructions on how to add a Download to a Service Page/Section Page, please refer to [Section 3.3.1](#), [Table 5b](#).

5. JIRA

On occasion, the web team will need assistance from WNMG with either completing a web request or dealing with Percussion issues. There is a trouble ticket system in place for such requests and general inquiries called JIRA. To get to JIRA, go to the following URL: <https://jira.cms.gov/servicedesk/customer/whsd> and enter your CMS ID and Password. (See [Figure 21a](#) and [Figure 21b](#))

JIRA can be used for various issues such as but not limited to:

- Large file uploads or multimedia files
- Assistance with High Priority web postings
- Creating new Sections on CMS.gov or Center Pages
- Defining a new Dynamic List*
- General Questions/Issues (login failure, inability to access Percussion itself, web pages not updating, etc...)

Some instructions on how to fill out the JIRA ticket for the different scenarios are provided below.

Once the ticket has been created, you should receive an email from the CMS Web Help Desk with your ticket number. Someone will usually respond to you within 24-48hrs. The requests are monitored regularly during business hours from 6 a.m.-8 p.m. ET.

5.1 Request for File Uploads

As mentioned in [Section 2.0](#), certain tasks can only be performed by JIRA/WNMG. Creating downloads for large files is one example. Any file larger than 20MB will have to be uploaded by someone in JIRA/WNMG.

Sign into JIRA and select either the *"I need content added, edited, or removed"* or *"I need help completing a task"* option to start a ticket. The table below provides suggested information to include in your JIRA ticket for requesting large file uploads.

After submitting your ticket, JIRA will respond with how to provide the file to them. After you upload the file as instructed, add a comment to your ticket that you have done so and request them to provide the URL for you once uploaded/completed. Note that the URL they provide will include whatever the file's name is when you upload it.

To add the file to a page: You'll need to create an [external link](#) for the download URL (provided by JIRA) and add it to the white space or Related Links field of a page.

Table 24: JIRA Create Ticket suggestions

JIRA field	Suggested text/selection for large files (over 20MB)
Phone Number:	Your phone number
Summary/Message Title:	Need large file uploaded
Site:	CMS.gov
Tool or Service:	Large File/Multimedia Posting
Component:	CM
Description:	Indicate you need a large file uploaded and request a SharePoint link to provide it. Request them to provide the full URL once the file has been uploaded.
Attachment:	(You will be unable to attach the file here as JIRA cannot take files over 10MB)
Problem Type:	Add/Modify Content
Priority:	Choose whichever is appropriate. Typically this will be Medium (Interferes with my duties, but work can continue)

5.2 Request for High Priority Posting(s)

High priority web postings may require assistance from someone in WNMG to run the servers off (publishing) cycle as most regulations are made public at 4:15pm. Since this is after the 4:00pm normal cycle run, we will need to request a special cycle run after the regulations are pushed to a public state. To do this, a JIRA ticket request should be put in the day before a high priority posting is to be published.

Provided below are suggested texts to include in your JIRA ticket for requesting off cycle publishing. Select the option "I need help completing a task" after you login in to JIRA.

Summary/Message Title: High priority posting requested on [date]

Site: Select "[CMS.gov]"

Tool or Service: Select "[Percussion]"

Priority: Select “Medium - I need something published at a particular time or a particular date”

Description: (Indicate you have a high priority posting that needs to have a special off cycle server run at [time] on [date of posting]. If applicable, indicate that this is a Regulation posting.)

Link or Content ID: Provide the URL and/or Content IDs of the pages and download items. You may also submit this as an attachment if the list is rather long. If submitting as an attachment, enter “See Attached” in the Link or Content ID field.

Here is a sample JIRA ticket entry:

Phone Number	443-725-5452
Site	CMS.gov
Tool or Service	Other
Component	CM
Priority	Critical - Creates Agency liability or prevents site visitors from performing critical tasks
Description	<p>Hello,</p> <p>This is a heads up. This request is to find out if there are any special manual publishing runs planned for the 4pm publishing run today. If not, we have a high priority regulation being pushed to public during the 4pm run. Can you assist by making sure the publishing run/logs are working properly?</p> <p>We hope we don't need to contact you for a special manual publishing run, but want to make sure you are aware in case we have to contact you.</p> <p>Thank you,</p> <p>Lisa Smith CM/PCG/DPCT</p>
Link or Content ID	http://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/Hospice/Hospice-Regulations-and-Notices.html
Problem Type	Other

5.3 Requests for New Sections/Center Pages/Dynamic List definition

When a request for a new Section, Center Page or Dynamic List needs to be defined, these all go to WNMG for approval before they will create it. These types of requests will first have to be entered into JIRA.

For more information on how to request new Sections to be added, please visit the following FAQs page: <https://questions.cms.gov/faq.php?id=5005&rdept=1068>

5.4 Viewing Existing Requests in JIRA

Once you have submitted a request, you can view it by clicking on “My requests” in the menu bar. You have the ability to search for all requests, current requests, or completed requests. The screen contains the title of the request, the status, the date/time submitted, and the latest action for the item. If you want to view the details of the request, just click on the title.

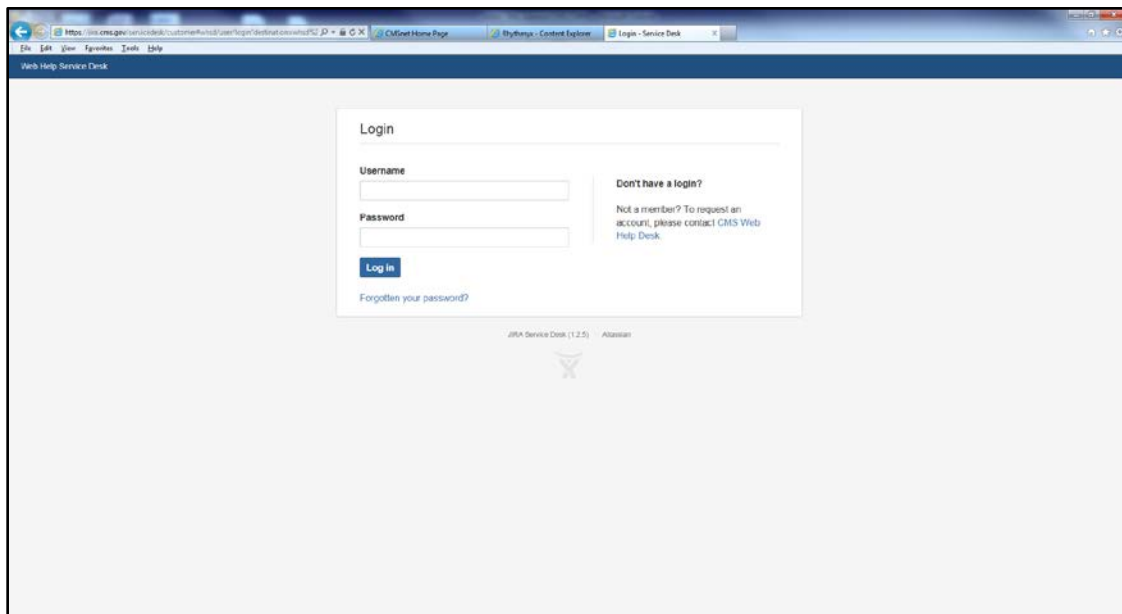


Figure 23a: JIRA Form login page

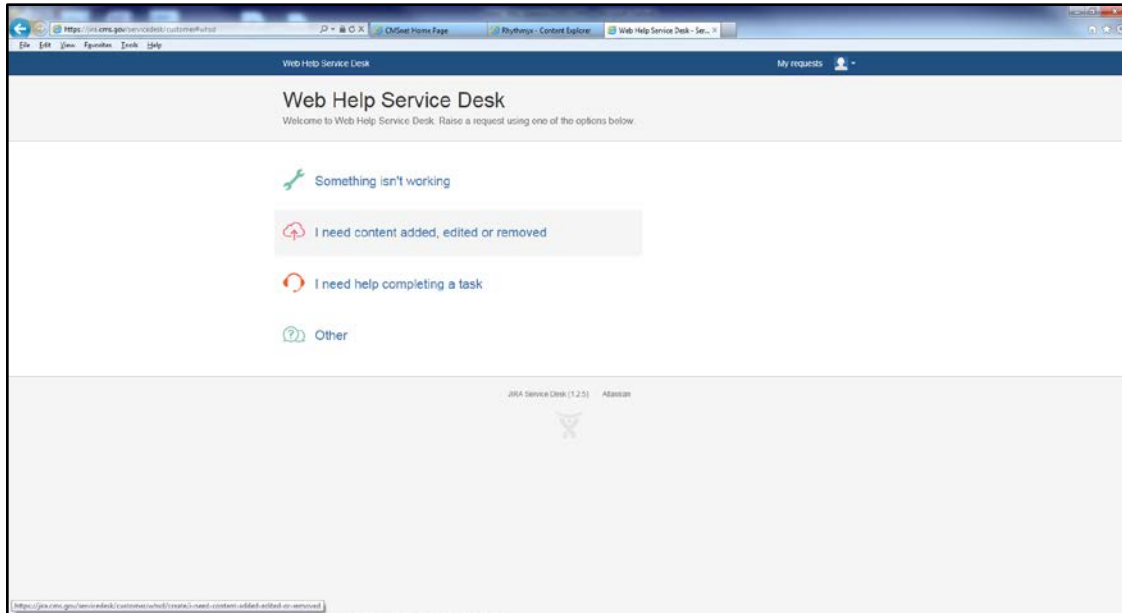


Figure 23b: JIRA Form selection page

6. Self-Audits

It is good practice to ensure you do not have any items checked out for editing at the end of each day. This prevents having someone contact you or WNMG to have the item checked back in before any subsequent changes can be made to the item. This also ensures that any changes you have made are put in public and not left in Quick Edit when the requestor expects the item to have updated by the next business day.

The steps to perform a self-audit are outlined below.

Table 25: Steps to perform a Self-Audit

Step #	Description
1	Navigate to the "Views" folder on the left hand menu. This has the binocular icon (<i>See Figure 22</i>)
2	Click on the plus sign "+" to expand the folder (if not expanded).
3	Click on "My Content" and expand the folder (if not expanded).
4	Click on "Checked Out By Me". The items that you currently have checked out will appear to the right of the screen (<i>See Figure 22</i>) with their "checkout status", "state", and "content type" displayed. If there are any items

Step #	Description
	<p>displayed here that should either be in “public” state or checked in, you can perform that task here.</p> <p>Note: <i>Once an item has been either checked back in or pushed back to a “public” state, the item will no longer be displayed in this folder.</i></p>



Figure 24: Percussion “Views” folder

7. Publishing Schedule

Generally, the current publishing schedule for items entered into Percussion is on the even hour. For example, an item was updated at 1:00pm. The server will begin running at 2:00pm and will pick up any items that were created or updated between the last publishing time, in this example 12:00 noon, and 1:59pm. The average publishing time is about 30-45 minutes. So by 2:45pm the item should be visible on cms.gov. These are estimates and actual run times may vary depending on if any issues were encountered during the publishing runs.

Navons do not update as often as other content types under the current publishing cycle configuration. Currently, Navons update at 11:00 am and 5:30 pm on week days.

Non-Binary, for example static webpages, have a full publishing run on the odd hour.

Binary, for example downloads, have an incremental publishing run on the even hour.

Publishing runs 7 days a week.

If an item you have updated does not publish by the end of the day, then this should be reported to WNMG via a JIRA trouble ticket. See [Section 5](#) for instructions on using JIRA.

8. Section 508 Compliance

Section 508 requires Federal agencies to make electronic and information technologies equally accessible to people with disabilities.

For more detailed information, visit <http://www.section508.gov>.

To learn how to make documents Section 508 Compliant, please see “Where Do I Find Section 508 Training?” on the “[What is Section 508?](#)” page on CMSNet.

Information is also available on CMS.gov at: <http://www.cms.gov/Research-Statistics-Data-and-Systems/CMS-Information-Technology/Section508/508-Compliant-doc.html>

8.1 508 compliance guidelines for downloads

The information provided below is a basic guideline on how to check downloads for 508 compliance before posting to the web. This applies to:

- Word documents
- PDF files
- Excel spreadsheets
- MP3/Audio files
- Image files
- PowerPoint Presentations

Starting with Microsoft Office 2010 a new tool for Word, Excel, and PowerPoint called the Accessibility Checker is available that you can use to check your documents for any issues that might make it challenging for a user with a disability.

Instructions on how to use the Accessibility Checker are located at the following website:

<http://office.microsoft.com/en-us/word-help/check-for-accessibility-issues-HA010369192.aspx?CTT=5&origin=HA101999993>

Word Documents – After using the Accessibility Checker, Word documents must be first converted to a PDF file before it can be posted on the web. In order to convert a Word document, you must have Adobe Acrobat Professional installed on your computer. For instructions on how to convert a Word document to PDF, please see “What is Section 508?” referenced above. You may also use the following for reference:

<http://www.adobe.com/content/dam/Adobe/en/accessibility/products/acrobat/pdfs/acrobat-x-accessible-pdf-from-word.pdf>. Please use the following checklist when ensuring Word files are compliant before converting to PDF:

<http://www.hhs.gov/web/508/accessiblefiles/checklistword.html>

PDF Files – All PDFs must be checked for 508 compliance before it can be posted on the web. You must have Adobe Acrobat Professional installed on your computer in order to perform an accessibility check on the PDF. To perform the basic check, open the PDF file. Click on “Tools”. Under “Accessibility”, click on “Full Check”. A pop-up window will appear; click on “Start Checking”. If the checker found issues, they will be listed on the left under “Accessibility Report”. All items on the report must be corrected before the PDF can be put on the web. For

assistance with correcting PDF issues, please refer to the “What is Section 508?” page mentioned above. If the checker found no issues, please use the following checklist to further ensure 508 compliance: <http://www.hhs.gov/web/508/accessiblefiles/checklistpdf.html>

Excel spreadsheets – Excel spreadsheets must have a corresponding text file in order to be 508 compliant. They can either be converted to a .txt or .csv file. If the spreadsheet data contains leading zeros, you may opt to convert the file to .txt as this will retain leading zeros while the .csv format will remove leading zeros. Once converted, they must be zipped together with the original .xls spreadsheet in a ZIP file before posting to the web. Please use the following checklist when ensuring Excel files are compliant:

<http://www.hhs.gov/web/508/accessiblefiles/checklistexcel.html>

MP3/Audio Files – All audio files must have a corresponding written transcript in order to be 508 compliant. It cannot be posted to the web alone without a transcript. The audio file will first need to be zipped before it can be uploaded to Percussion as a Download. The Transcript must be in 508 compliant PDF format before it can be posted to the web. Both files can either be zipped together or posted separately however, the audio file cannot be posted without a transcript if posted separately (we strongly encourage zipping both together).

Image Files – Image files must be checked for 508 compliance in 2 places. The first place is on the Image file itself in Percussion. Make sure the “Image Alt Text” field is filled out. (See [Figure 9a](#) & [Figure 9b](#)) The second place is on the page where the image is used. Under the “Code” tab in the Body field, look for the tag and make sure you enter a descriptive text of the image being used.

PowerPoint Presentations – PowerPoint presentations must first be converted to a PDF file before it can be posted on the web. In order to convert a PowerPoint presentation, you must have Adobe Acrobat Professional installed on your computer. For instructions on how to convert a PowerPoint presentation to PDF, please see “What is Section 508?” referenced above. Please use the following checklist when ensuring PowerPoint files are compliant: <http://www.hhs.gov/web/508/accessiblefiles/checklistppt.html>

8.2 508 compliance checklist

The following is a general checklist of things to look for when performing 508 compliance checks on any content item or page:

- ✓ Tables – make sure there are headers for columns and/or rows as needed.
- ✓ Please do not use red text in documents.
- ✓ Graphics that should be marked as background.
- ✓ Documents over 9 pages long require a table of contents.
- ✓ Make sure language is set on all PDF files
- ✓ Documents using LOGOs; the alt text needs to be spelled out. Do not use acronyms.
- ✓ Reading order is not correct; use reflow to make sure the document is reading correctly.

For detailed checklists for each content type, use the appropriate link provided below. You may find it helpful to review the checklist and also print the checklist to check off each item after you have created your file or when you receive the file.

PDF checklist: <http://www.hhs.gov/web/508/accessiblefiles/checklistpdf.html>

Word checklist: <http://www.hhs.gov/web/508/accessiblefiles/checklistword.html>

Excel checklist: <http://www.hhs.gov/web/508/accessiblefiles/checklistexcel.html>

PowerPoint checklist: <http://www.hhs.gov/web/508/accessiblefiles/checklistppt.html>

Multimedia checklist: <http://www.hhs.gov/web/508/accessiblefiles/checklistmulti.html>

9. Additional Resources

The Office of Communications/Web and New Media Group (WNMG) have developed several resources to assist Percussion users utilizing screen shots and video tutorials. These resources are available at the Percussion Training section on CMSNet at:

<http://intranet.cms.gov/Component/OC/Percussion-Training/user-guides.html>

Below are direct links to some of the Percussion Training documents:

- [Percussion Fundamentals Training Presentation \(PPT\)](#)
- [Contributing Editor Quick Guide for CMS.gov](#)
- [Section Editor Quick Guide for CMS.gov](#)
- [How to Edit Dynamic Lists on CMS.gov \(PPT\)](#)
- [How to Edit Navons on CMS.gov \(PPT\)](#)

*Additionally, we have a [Dynamic List User Guide](#) (for admins) available to assist advanced users with defining a new Dynamic List. This is available to advanced users within the DPCT web team.

9.1 Update a Dynamic List Definition

The ability to define a new Dynamic List or to update an existing Dynamic List definition are usually reserved for WNMG team members, however, some members of the DPCT web team have been granted this ability.

Occasionally a dynamic list definition will need to be updated, for example when a new year needs to be added or a new item needs to be added to a drop down list. For those users on the DPCT web team that have this ability, follow the steps outlined below for updating a dynamic list definition.

Table 26: Steps to update a Dynamic List definition

Step #	Description
1	Locate the Dynamic List. These are usually located at the main folder level with “DL” at the end of the name. Example: //Sites/MSGOV/Medicare/Medicare Fee-for-Service Payment/PhysicianFeeSched/PFS <i>Federal Regulation Notices DL</i>
2	Put the item in <i>Quick Edit</i> , then <i>Edit</i> .
3	Locate the drop down list field that needs to be updated in the Dynamic List. To add a selection: Locate the “ <i>Dropdown – Choices</i> ” field. Right click in the top box and a menu will open. Select either “ <i>Insert below or Insert above</i> ” then “ <i>Choice – Choice</i> ”. Enter the new information. The new item should appear. To remove a selection: Locate the “ <i>Dropdown – Choices</i> ” field. Right-click on the drop down choice, a menu will open; Select “ <i>Remove</i> ” then Select “ <i>Choice – Choice</i> ”. The menu item should disappear.

Step #	Description
4	Click “ <i>Update</i> ” then “ <i>Close</i> ”.
5	Right click the DL and select “ <i>Workflow > Check in</i> ”. This will return the content item to Quick Edit state, making it “unlocked” allowing others to edit and approve.
6	Push the item to “Public” by selecting “ <i>Workflow > Direct to Public</i> ”.

10. Website Statistics

Website statistics are available through Google Analytics. You must first open a Google Analytics account at <http://www.google.com/analytics> using your CMS email address. Then notify WNMG to assign your permissions. For instructions on how to pull website statistics through Google Analytics, please see [Appendix A](#).

11. Troubleshooting Tips

This section contains troubleshooting tips for some common issues encountered while maintaining web content in Percussion. The information contained here is not all inclusive and is a living document with information added or removed as needed. If you need help with an issue not identified here, please contact a DPCT SME for assistance (see [Section 12](#)). If the SME is unable to provide assistance, please enter a JIRA ticket for the issue.

11.1 Text is duplicated multiple times on a page

There have been cases where content on a page is duplicated. To resolve this follow the instructions on how to update the content type in question (Section Page, Dynamic List, etc...). When you get to the Body field, do the following:

1. Click on “*Tools -> Source Code*” from the menu and scroll to the top of the page.
2. Look for the <div > tag.
3. There should be some extra coding between the beginning of the div tag and the close carat >. **Example:** <div class=“rxbodyfield”
xmlns:w=“urn:www.microsoft.com/word” xmlns:o=“urn:www.microsoft.com/office”
xmlns:st1=“urn:www.microsoft.com/smarttags”
xmlns:x=“urn:www.microsoft.com/excel”
xmlns:st2=“urn:www.microsoft.com/smarttags2”>
4. Delete all the text after <div class=“rxbodyfield”.
5. The resulting tag should look like this <div class=“rxbodyfield”>
6. Click “*Update*”, Click “*Close*”
7. Resubmit the page to the Section Editor to be approved to “Public”

The reason this occurs is because whoever created or updated the page copied text from either MS Word or MS Excel which contains some embedded code that was transferred to Percussion. This is why it is good practice when you copy and paste text, to paste as “plain text” and format the text within Percussion.

11.2 Caching Issue on CMS.gov or CMSnet

A common problem experienced by users is when content items are updated or replaced. It appears that the download or page has not been revised, when it has actually published to production. To troubleshoot, try these steps:

- Login to Percussion and verify that the item is in a Public state.
- Verify that the correct version is appearing in Preview.

First, try clearing your browser cache. Instructions on how to clear your browser cache is available at: <https://questions.cms.gov/faq.php?id=5005&faqId=12136&rdept=>

Per WNMG, this is an internal CMS server issue. The JIRA representatives have told us it can take up to 24 hours for the file or page to update on all the servers.

If clearing the cache does not work, try viewing the page in a different browser. For example use Google Chrome or Mozilla Firefox.

If neither of these techniques work, you may need to enter a JIRA ticket for help with troubleshooting.

11.3 AMA or AHA Agreement not working

If you are passing a file through the AMA or AHA agreement, please make sure that the download does not inadvertently contain a space at the end of the “System Title” name. Otherwise, the space gets turned into a dash, and the AMA pass-through will not work.

To check to see if there is a space, place the cursor in the System Title field of the download item and hit the “End” key. If there is a space between the end of the System Title name and the cursor, that means there is a space in the name. To resolve this, remove the space; update the download item and resubmit the item for approval to public.

11.4 Content Item is locked for Editing

On occasion, a content item you need will be “locked for editing” by another user. Sometimes, the last person to update the page forgot to check the item back in. To resolve this:

1. Right click on the item to be updated. You will see there is no option after Workflow (*Workflow > No Entries*). Select *View > Audit Trail*. This will display an audit trail of when the item was last updated and by whom.
2. Look under the “Who” column to see who has the item checked out and look under the “Date” column to see when it was last updated. Also under the “Transition (id)” column will provide the state of the content item (Example: “Checked out by name@cms.hhs.gov”).
3. Send an email to the person who has the item checked out to request that they check the item back in so you can edit it. If the person is no longer working for CMS, enter a JIRA ticket (See [Section 5](#)) to request that the item be “forced checkin” by WNMG as the user no longer has access to Percussion.

11.5 File is too large for Percussion

If you receive a file that is larger than 20MB and attempt to upload it into Percussion, you will receive an error message as shown in [Figure 23](#) below. To resolve this, you will need to open a JIRA ticket and request to have the file uploaded for you. Refer to [Section 5](#) regarding how to use JIRA. NOTE: Percussion indicates that the file size limitation is 25MB, but we have

experienced an error from about 21MB and up. We have rounded it down to 20MB for simplification.

The screenshot shows a web browser window with the URL https://wcm.cms.gov:9009/?sys_view=sys_All&sys_command=edit&sys_cacheid=2. The browser title is "Rhythmyx - Medicare - Windows Internet Explorer". The page displays a validation error message in red: "The following field(s) produced validation errors: File Size: Size of the download is bigger than 40MB". Below the error message, the form fields are visible:

- * System Title: Medicare_Data_to_Calculate_Your_Primary_Servi
- * Title: Medicare Data to Calculate Your Primary Service
- * Pub Date: 2012-03-19 00:00:00
- * File: [Browse...] [Clear] Preview File
- Language: English
- Binary Filename: Medicare_Data_to_Calculate_Your_Primary_Service_Areas.zip
- File Type: application/x-zip-compressed
- File Size: 53068314
- Old URL: https://wcm.cms.hhs.gov/stellent/groups/cms_
- Description: Medicare Data to Calculate Your Primary Service Areas
- Stellent_ContentID: CMS1249032

At the bottom of the form, there are "Update" and "Close" buttons.

Figure 25: File size restriction

After submitting the JIRA ticket and you will receive a response with a link, the link is entered into Percussion as "Other Content Type", refer to [Section 3.6.2](#) for how to create an external link.

AMA agreement – If the file goes through the AMA agreement you enter the entire link (Example: `"/apps/ama/license.asp?file=http://downloads.cms.gov/files/ccipra-v222r0-f2.zip"`) or with just double forward slashes (Example: `"https://www.cms.gov/apps/ama/license.asp?file=//downloads.cms.gov/files/ccipra-v222r0-f1.zip"`) in the "External Link Path (include protocol, e.g. "http://" or "https://")" field.

11.6 Dynamic List Item not rendering

Before you can create a new or edit an existing dynamic list item; you will need the Altova ActiveX component installed on your machine before the dynamic list item will render properly. Check to make sure you have Altova Active X installed. If it is installed, check to make sure you have the most current version. If all else fails, you may need to open a JIRA ticket to get assistance from WNMG.

11.7 Dynamic List Item / Java Issues

The following issue(s) are unique to Dynamic List Items due to Java Issues. This problem may manifest in different ways. If you experience issues with either updating or creating a dynamic list item due to java issues and you already have Altova Active X installed; follow these troubleshooting steps:

1. Contact the Action Desk to ensure you have the correct version of the Altova Authentic browser plugin and Java. The Ephox EditLive requires Java version 7 update 40 or higher so you can edit the body content of the item.
2. Close Internet Explorer.
3. Click on the Windows icon (circle) in the lower left-hand corner of the screen.
4. Select "Control Panel" > "Programs" > "Java (32-bit)".
5. When the "Java Control Panel" window appears, click on the "Settings..." button.
6. When the "Temporary Files Settings" window appears, click on the "Delete Files..." button.
7. On the "Delete Files and Applications" window, make sure that the check boxes next to "Trace and Log Files" and "Cached Applications and Applets" are checked, and click the "OK" button.
8. Click the "OK" button on the "Temporary Files Settings" window to close it.
9. Click the "OK" button on the "Java Control Panel" window to close it.
10. Close the "Programs" window.
11. Open Internet Explorer and go to Percussion.
12. Login to Percussion again and try to edit or add a new dynamic list item. Java will take a while to load, but, hopefully, this will fix the problem.

If however, you get a screen where there is not an option to choose a list from below the Title field (See *Figure 24*), then you will not be able to enter a new dynamic list item or to revise an existing list item. This indicates an issue with Java and the dynamic list. Follow these steps to see if it resolves the issue:

1. Close the Dynamic List Item.
2. Right click and select *New Item – Dynamic List Item*. If still no drop list appears, repeat Steps 1 & 2 multiple times.
3. On the fifth time, you should be able to see the drop-down list below the Title field. You can then select the correct list to enter.

If the issue deals with your mouse not allowing content to be entered in the Dynamic List Fields, then follow these steps to troubleshoot the problem:

1. An administrator with rights to add software must log in.
2. The user needs to log off Windows and log back in.
3. Run Internet Explorer and go to Tools > Internet Options > Advanced tab > Reset
4. Check box for "Delete personal settings," then click "Reset"
5. Click Close, and then restart Internet Explorer.

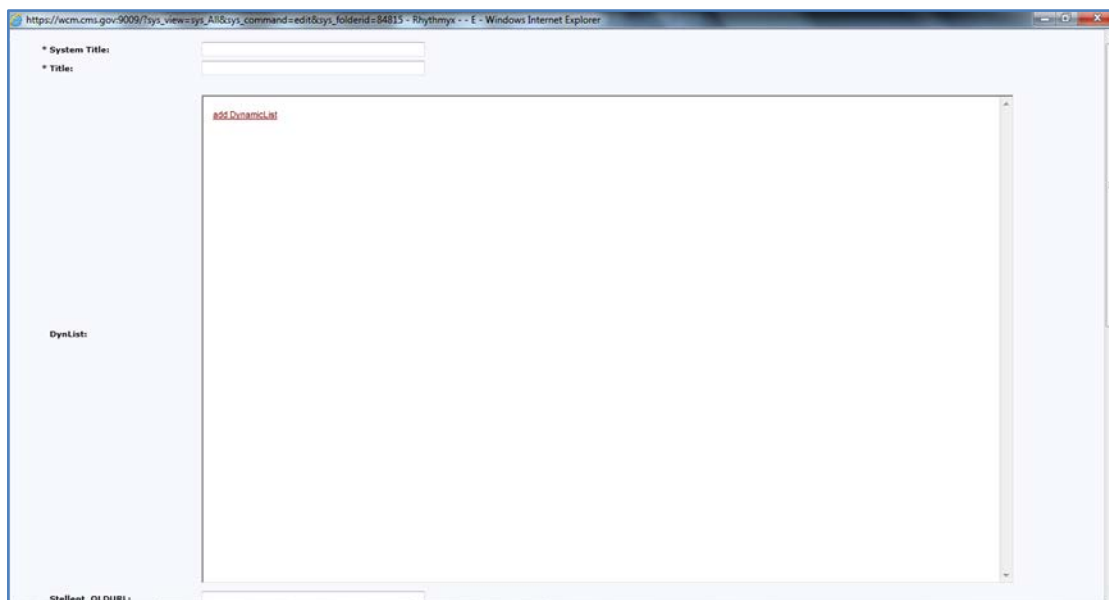


Figure 26: Dynamic List Item/Java Issue

11.8 Dynamic List Item / Non-Java Issues

When a dynamic list item is not updating and it is not a Java issue; try these steps:

1. Close out all your web browsers.
2. Reopen your web browser and login to Percussion.
3. If you still do not see your updates; close out all of your web browsers and reboot your computer. This should resolve the issue (it has to do with caching on your computer).

If the issue is still not resolved, then it may be an issue with the publisher not running, or the dynamic list item had become corrupted or disassociated from the dynamic list. You will need to open a JIRA ticket to get this resolved by WNMG. Please see [Section 5](#) on how to open a JIRA ticket.

11.9 Item not showing up in Impact Analysis

When a content item that you know is linked to a page but is not showing up in the Impact Analysis of the content item itself, it could be that the item is referenced on the page as a hyperlink instead of a “Inline Link” or “Inline Template” link. To correct this, go to the page that it’s used on and remove the hyperlink. Then reattach the item to the page using either the “Inline or Template” link. **Note:** the item MUST be checked back in before the Impact Analysis will pick up the relationship. Now, when you go back to the content item, the Impact Analysis should show that the content item is tied to a page.

The other issue with using “hyperlink” instead of the “Inline or Template” link when referencing downloads is that the download item will not properly show the most recent download in CMS Preview. This is mainly an issue for updated downloads so remember to use either Inline or Template links when adding download content items to a page. DO NOT USE hyperlink.

11.10 CMSnet Right Navigation Issue

If you have content that needs to be standalone and you do not want it part of the PCG right navigation, the best way to do that is to create a separate subfolder and place your content there. The “right-hand navigation” is automatically suppressed for items living in folders one level down from your service page’s current location. If you just turned off “right navigation”, you will not be able to use “related resources” on that page either. However, if you add the “Feedback Badge” and turn off right navigation, then both “feedback” and “related resources” show up on the right. We have been working with WNMG and they are not sure why that works that way. The Help Desk is looking into the issue.

11.11 CMSnet Video Issue

In order to put video content on the Intranet pages, the file format must be in .mp4. **Note:** *This does not apply to YouTube links.* The content person should provide an embedded captioned .mp4 file for posting. A .wmv file will not work as confirmed by Aaron Lartey. You will need to enter a JIRA ticket to request the file to be saved on the “multimedia server” and have them send you the “url”. You can then create a video Item in Percussion and insert that on a page.

11.12 Calendar feature not working

You may encounter an issue with the calendar feature not working or displaying in Percussion. To fix this, check your Zoom percentage in Internet Explorer. If it is at anything but 100%, the calendar feature will not display. To check your Zoom percentage, go to the Internet Explorer bar and click on “View”, go down to the “Zoom” option and make sure it’s at 100%. If it’s not at 100%, you can change it by clicking on “Zoom” and then click on “100%”. This should fix the calendar issue in Percussion.

11.13 PDF not displaying for non-IE browser

If a user receives the following error message:

“Please wait...If this message is not eventually replaced by the proper contents of the document, your PDF viewer may not be able to display this type of document.

You can upgrade to the latest version of Adobe Reader for Windows®, Mac, or Linux® by visiting http://www.adobe.com/go/reader_download.

For more assistance with Adobe Reader visit <http://www.adobe.com/go/acrreader>.”

This is due to the fact that certain PDF files created in Adobe LiveCycle can only be opened in Adobe Reader and Adobe Acrobat. When you try to open these files in alternative PDF viewer, then you will see the error message. (See [Figure 25](#)).

Unfortunately, it’s not easy to remove this message and modify the PDF so that it can be opened in alternative PDF viewers. The person who created the original form must re-create the form using options that do not restrict which PDF viewers can open and display the file.

Adobe has made the decision that since very few non-Adobe products support these special PDF files that it is better to show this message – and require the user to download Adobe Reader or Adobe Acrobat – than it is to let the PDF viewer try to render the document.

You may want to ask the user to Reader-extend the documents so that you can view it with Adobe Reader.

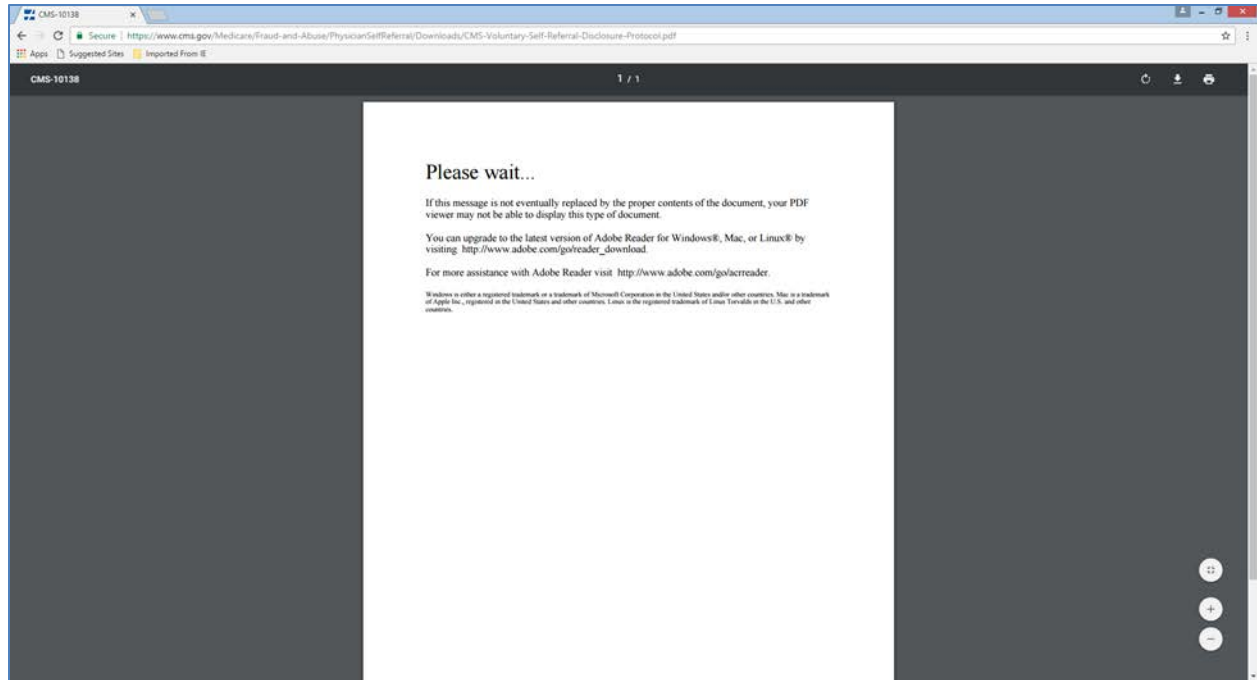


Figure 27: PDF error message

11.14 Removing 'Ghost' files

Ghost files are pages or downloads that are public but the content cannot be found in Percussion. These most often occur when a content's system title is changed without archiving the content first. A URL will still be active even though there is no content in Percussion that matches the path.

Possible ways to remediate:

- Create new content that matches the URL path (use a different document than what the ghost file is). Publish the new content. Confirm your new document is public. Archive the content you created.
- If the new content doesn't replace the ghost file:
 - Try adding the file extension in the system name (.pdf, .zip, etc.)
 - Try using spaces instead of dashes
- Contact JIRA for assistance.

11.15 Return to List Not Working

If the "Return to List" link is not working after clicking on a dynamic list item, it is usually because the *Dynamic List Section Page* was not added to the *Dynamic List Items Navon* "Nav Landing Page" section. To correct this, go to the Dynamic List Items folder and find the Navon. Edit the Navon and add the Dynamic List Section Page under "Nav Landing Page" section (See [Figure 26](#)), push it to Public. Now all of the Dynamic List items needed to be re-published to reflect the change so you will need to enter a JIRA ticket to have them do this for you.

More information about how to create a new Dynamic List is available in the [Dynamic List User Guide](#) in SharePoint. This important step is usually missed if you are not careful to follow all of the directions in the User Guide. If this does not resolve the issue, then you will need to enter a JIRA ticket for the problem.



Figure 28: Dynamic List Item Navon

12. Search Tips

There are several ways to perform content searches in Percussion. Most general searches by a partial name using wild cards (* - asterisk symbol) would bring in a broad range of results. You can narrow down your searches by first clicking on a specific folder and including information in the Content ID and Content Type fields under the “*Advanced>>*” button.

12.1 Simple Search

Example of a general/simple search using wildcards for MLN Articles, using MM10922 example:

Right click on “*CMSSGOV*” folder, select “*Search in folder*” and a default “Simple” search bar is displayed (See [Figure 27a](#)). Type in “*MM109**” and Click “*OK*”. This will bring back anything that matches “*MM109*” (first 5 characters) or has “*MM109*” anywhere in the content item (See [Figure 27b](#)). This includes other content types like Dynamic Lists and Section Pages along with Downloads.

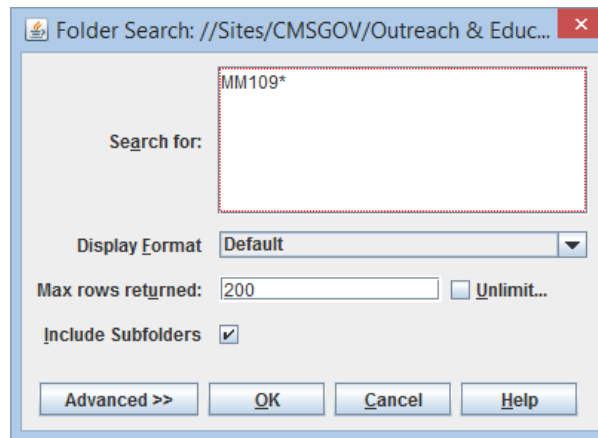


Figure 29a: Simple Search box

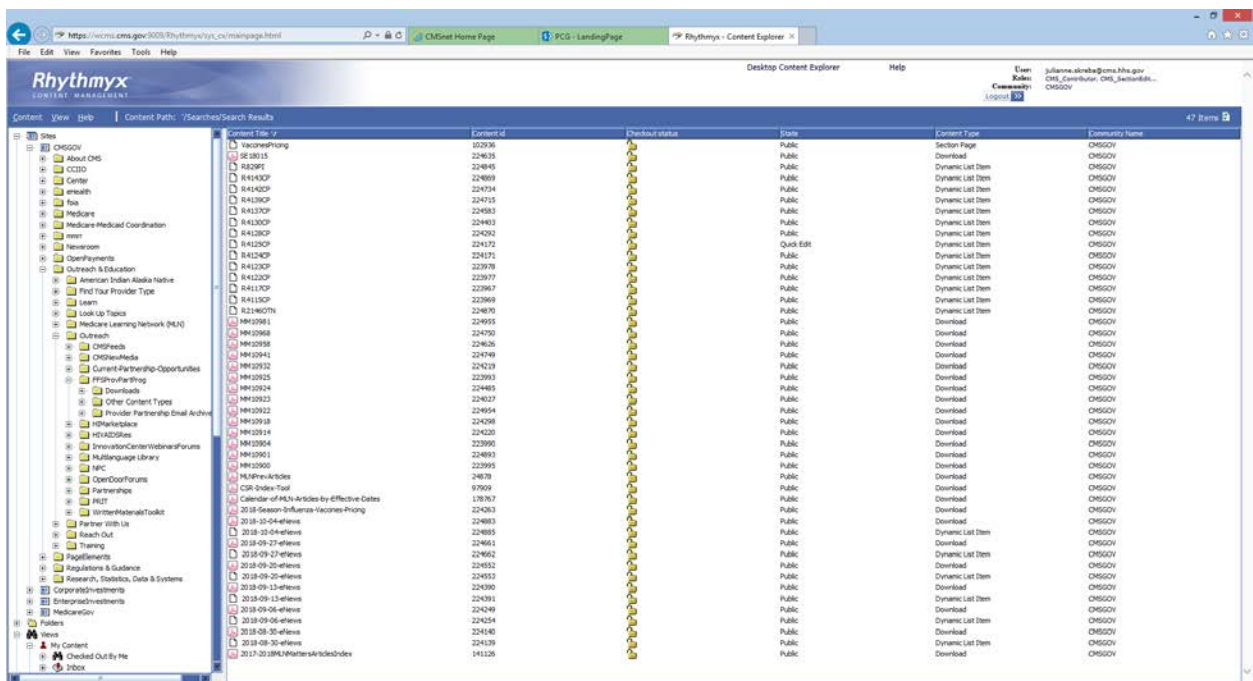


Figure 29b: Simple Search results

12.2 Advanced Search

Example of an Advanced Search, using wildcards for MLN Articles, using MM10922 example again:

Right click on “CMSGOV” folder, select “Search in folder” and a default “Simple” search bar is displayed. Type in “MM109*” and Click “Advanced” button. This will expand your search criteria with additional information and narrow down the matches brought back. In this case, “Community” has “CMSGOV” selected only and Content Type has “Download” selected

only. So here we are only looking in CMS.gov for Downloads that match “MM109*” (See [Figure 28a](#)). Here, only “Download” content types are returned (See [Figure 28b](#)).

Folder Search: //Sites/CMSGOV/Outreach & Education

Search for: MM109*

Display Format: Default

Max rows returned: 200 ☐ Unlimit...

Include Subfolders ☒

Search Criteria

Title:

Display Title:

File Name:

Content id:

Community: CMSGOV

Content Type: Download

Created by:

Expand query with synonyms ☐

<< Simple Customize... OK Cancel Help

Figure 30a: Advanced Search box

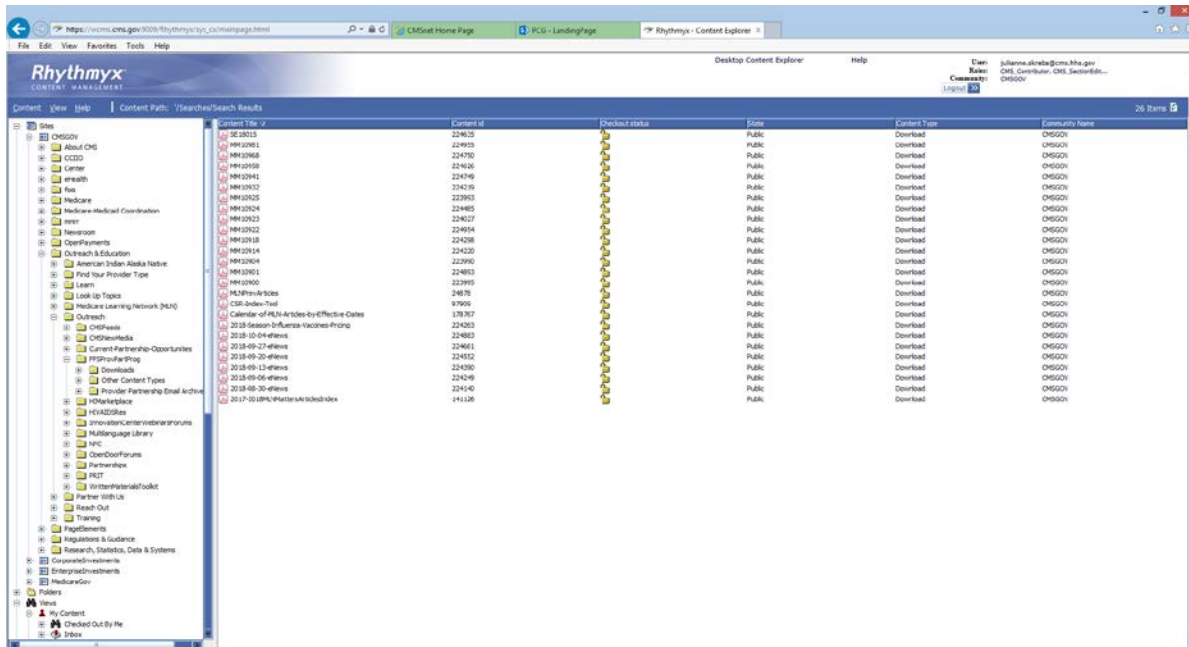


Figure 30b: Advanced Search results

12.3 External Links

Searching for external links in Percussion is “hit or miss”. If you think there is an existing external link content item created for it, chances are that one exists, you just have to find it.

Tips for finding specific **You Tube videos** (Example: <https://www.youtube.com/watch?v=9EH2pAo0yQ>):

Click on the “CMSGOV” folder at the top left. Right click in the folder and select “Search in folder”. A simple search box will display. Do a partial search of the external link you are looking for. In this example use the numbers and letters after the equal sign or dash “9EH2pAo0yQ”. This will find the specific You Tube video that is already in Percussion.

If you just type in “www.youtube.com*”, this will bring back a lot of results as there are a lot of You Tube videos already in Percussion. And for some reason, if you use “https://www.youtube.com*” in your search, it will bring back nothing. It doesn’t appear to like the “https://” part.

Tips for finding other **external links** (Example: <https://pecos.cms.hhs.gov/>):

Click on the “CMSGOV” folder at the top left. Right click in the folder and select “Search in folder”. A simple search box will display. Do a partial search of the external link you are looking for. In this example use “pecos.cms.hhs”; then click on *Advanced* -> button and select “CMSGOV” in the Community box and select “CMS External Link” in the Content Type box to narrow down your search results.

You will notice that there are multiple content entries for the same URL. In most cases, this is due to the “Display text” being different. You will need to look at each entry to

identify which one to use or if you will need to create a new one to use if your display text will be different than the others.

13. DPCT Percussion SMEs

The list below identifies the DPCT team members that can provide assistance in the event you receive any requests that are not documented in this guide or need assistance with troubleshooting an issue.

Table 27: DPCT SME contact list

DPCT SME	email	phone
David Shellem (508 compliance)	David.Shellem@cms.hhs.gov	X61837
Lisa Smith	Lisa.Smith@cms.hhs.gov	X60965
Julianne Skreba	Julianne.Skreba@cms.hhs.gov	X65733
Michael Johnson	Michael.Johnson@cms.hhs.gov	X63675

**For any request regarding FAQs, please contact the BOS area at CMMInquiry@cms.hhs.gov.

In the event you are unable to contact any of the SMEs above, please open a JIRA ticket to request assistance from WNMG at the following URL:

<https://jira.cms.gov/servicedesk/customer/whsd>.

Your Username would be your 4 character CMS ID and your password is your CMS password. You will need to make sure you have a EUA job code for "JIRA_User" before you can access JIRA.

** Please note, use the email below only in dire emergencies as this will send an email blast to ALL of OC.*

WNMG emergency contact email address:

WNMG_WCMS@cms.hhs.gov

14. Appendix A

14.1 Google Analytics

After you have created an account with Google Analytics, follow these steps for retrieving CMS.GOV statistics for Sections and Section Pages.

1. Go to the Google Analytics web site at <http://www.google.com/analytics/>.
2. Click on the “Sign in” link located in the upper right-hand corner of the screen.
3. Enter your work email address and password and click the “Sign in” button.
4. Click on the www.cms.gov link located under the CMS folder.
5. Select “Behavior” in the left-hand menu to expand the items under it.
6. Select “Site Content” in the “Behavior” sub menu to expand the items under it.
7. Select “All Pages” from the “Site Content” sub menu.
8. In the upper right-hand corner, click on the date drop-down arrow to change the span of time for which you would like statistics.
9. Click on the start date and click on the finish date to highlight the span of time for which you would like to search.
10. Click on the “Apply” button to accept the date change.
11. In the lower portion of the screen, drill down to the URL for which you would like statistics. For example, to find the number of Pageviews for a section located at <http://www.cms.gov/Medicare/Medicare-Fee-for-Service-Payment/AcuteInpatientPPS/>, click on “/medicare/” – “/medicare-fee-for-service-payment/”. Look for the “/acuteinpatientpps/” link and record the number of Pageviews noted in the next column. Or, enter the URL in the search box in the middle of the page, but remove <https://www.cms.gov> from the URL.
12. To obtain statistics for downloads (PDFs or Zip files), select “Behavior” in the left-hand menu to expand the items under it.
13. Select “Events” in the “Behavior” sub menu to expand the items under it.
14. Select “Top Events” from the “Events” sub menu.
15. In the upper right-hand corner, click on the date drop-down arrow to change the span of time for which you would like statistics.
16. Click on the start date and click on the finish date to highlight the span of time for which you would like to search.
17. Click on the “Apply” button to accept the date change.
18. Click on “download.” Select “click-pdf” or “click-zip” (based on the request).
19. Enter the URL in the search box in the middle of the page, but remove <https://www.cms.gov> from the URL. Click on the magnifying button.
20. Depending on the request, you may want to send results in a table format with an explanation of the difference between the Total Events and Unique Events.

Example:[CSR Index Tool:](#)

Time frame:	Total Events:	Unique Events:
Last month (Nov 16, 2018 – Dec 16, 2018)	19	18
Last year (Dec 16, 2017 – Dec 16, 2018)	272	235

[CSR MLN Matters Tool:](#)

Time frame:	Total Events:	Unique Events:
Last month (Nov 16, 2018 – Dec 16, 2018)	6	6
Last year (Dec 16, 2017 – Dec 16, 2018)	126	88

Total Events count if the same user/computer accessed the download multiple times, Unique Events do not. So to interpret this, using the last row for the CSR Index Tool table: “In the last year, 235 people have accessed the CSR Index Tool a total of 272 times.”

Google Analytics Top Events – Retrieving Page Views for Downloads

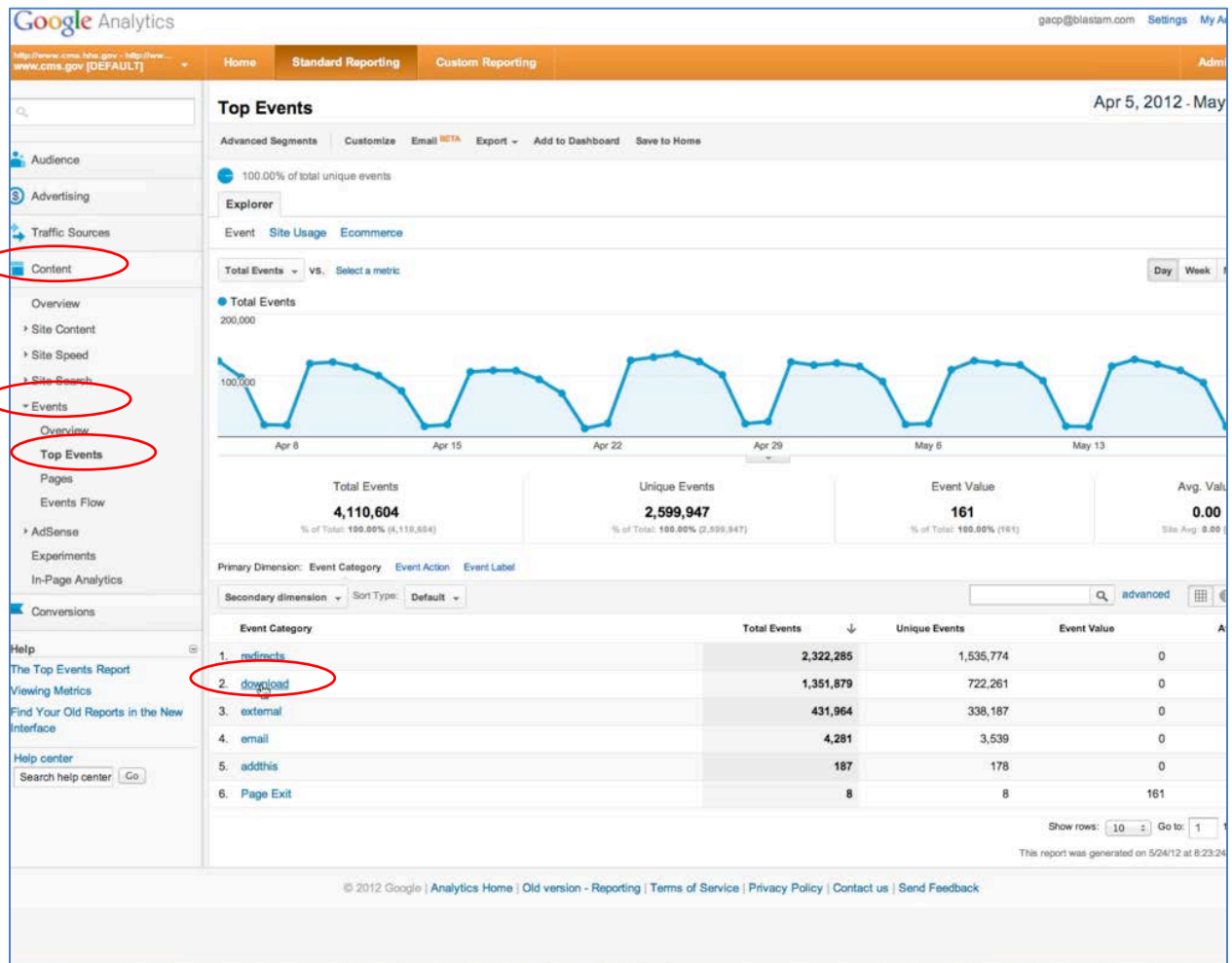


Figure 31a: Google Analytics Top Events page

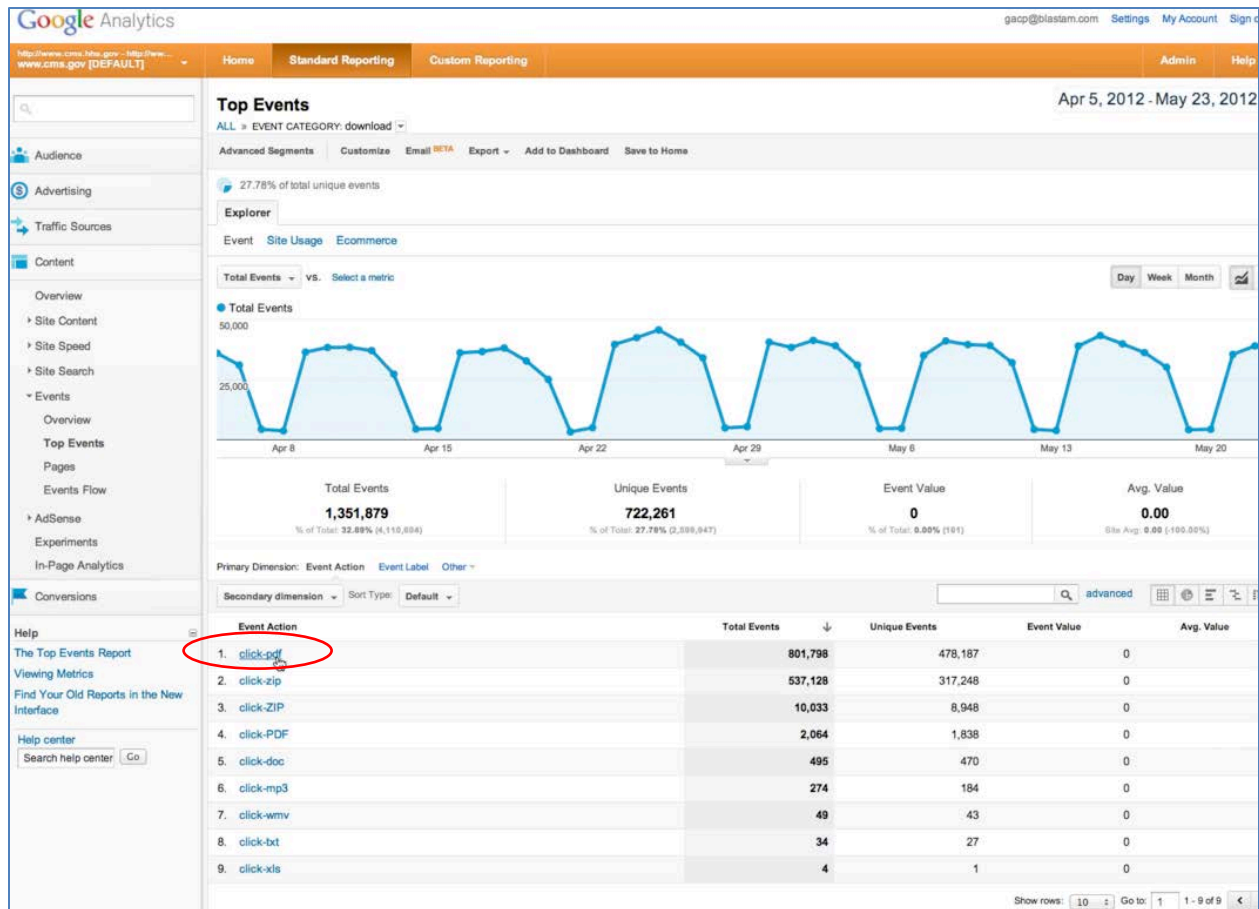


Figure 31b: Google Analytics Top Events page

14.1.1 MLN – Tracking HTML Products

This is the Tealium code that will allow the MLN to use Google Analytics to track their HTML scripted pages that are not entered through Percussion. This code needs to be added by their contractor.

Within the <head> of the page:

```
<script src="//tags.tiqcdn.com/utag/cmsgov/cms-www/prod/utag.sync.js"></script>
```

Immediately after the opening <body> tag of the page:

```
<script type="text/javascript">
(function(t,e,a,l,i,u,m){
  t="cms-www";
  e=/^(www\.)?cms.gov/;
  a=(e).test(window.location.hostname)?'prod':'dev';l="//tags.tiqcdn.com/utag/cmsgov/
'+t+'/' +a+'utag.js';i=document;u='script';m=i.createElement(u);m.src=l;m.type='text/java'+
u;m.async=true;l=i.getElementsByTagName(u)[0];l.parentNode.insertBefore(m,l);
```

```
})();  
</script>
```

14.1.2 Updating the Monthly “CMS at a Glance” Report

Each month, Dhar requests the “CMS at a Glance” report by a certain date. Follow these steps for updating the monthly “CMS at a Glance” report:

1. To prepare the report, open the previous month’s Excel spreadsheet located at <G:\PCG\DPCT\WebStatistics\Google Analytics Statistics>.
2. Save the file as the month for which you will be collecting statistics.
3. Delete the figures in the “Page/Dynamic List Counts” column for the sections. **NOTE:** Do not delete the last number. It is the sum for the column.
4. Use the instructions under “Retrieving CMS.GOV Statistics for Sections and Section Pages with Google Analytics” to collect the number of Pageviews for the URLs on the spreadsheet.
5. Save the data, but do not close the file.
6. Open the previous month’s Word document located at <G:\PCG\DPCT\WebStatistics\2014 CMS at a Glance>.
7. Update the “Month/Year” in the report heading and save the file under the new month’s name.
8. For the last row of the table entitled “Grand Total”, record the “sum” figure in the last row, last column of the Excel spreadsheet.
9. For the “Grand Total of CM Center Pages”, add the number of Pageviews for all of the URLs that begin with <http://www.cms.gov/Center/> and enter the figure in the table.
10. For “Grand Total of CM Section Pages” subtract the “Grand Total of CM Center Pages” from “Grand Total” and enter the figure in the table.
11. On the Excel spreadsheet, Click on column C to highlight the entire column.
12. On the “Home” tab, select the “Sort & Filter” button and choose “Sort Largest to Smallest”.
13. When the “Sort Warning” box appears, select “Expand the selection” and click on the “Sort” button. The spreadsheet will be reordered by the number of Pageviews.
14. In the “Section” column, select the column data for rows 3-27 and select “CTRL-C” on the keyboard to copy it.
15. On the Word document, highlight the data in the white cells in the first column of the table. Select “CTRL-V” to paste the new list of sections from the Excel spreadsheet into the document.
16. In the “Page/Dynamic List Counts” column, select the column data for rows 3-27 and select “CTRL-C” on the keyboard to copy it.
17. On the Word document, highlight the data in the white cells in the second column of the table. Select “CTRL-V” to paste the new list of Pageviews from the Excel spreadsheet into the document.
18. Save the Word document, but do not save the Excel document.
19. Send the Word document to Dharmender Chona and “cc” Ada Sanchez.

Acronyms

Acronym	Literal Translation
AATE	Active Assembly Table Editor
AHA	American Heart Association
AMA	American Medical Association
CE	Contributing Editor
CM	Center for Medicare
CMS	Centers for Medicare and Medicaid Services
CMSnet	Centers for Medicare and Medicaid Services Intranet
DPCT	Division of Provider Communications Technology
DL	Dynamic List
MLN	Medicare Learning Network
OC	Office of Communications
PCG	Provider Communications Group
SCE	Section Editor
SE	Senior Editor
SME	Subject Matter Expert
URL	Universal Resource Locator
WNMG	Web and New Media Group

Glossary

Term	Definition

Revision History

Version Number	Date	Author/Owner	Description of Change
1.0	05/07/2014	J. Skreba A. Triggs L. Smith	Draft
1.5	07/09/2014	A. Triggs	Added e-News to special processing section
1.6	08/25/2014	L. Smith	Added language for revised MLN Matters Articles in Section 3.15.3
1.7	10/20/2014	J. Skreba	Updated epub and QRCode instructions with naming convention change in sections 3.15.1 & 3.15.4.
1.8	10/23/2014	J. Skreba	Updated section 12.0 SME list for FAQs.
1.9	11/13/2014	J. Skreba	Added instructions for “blue box” and updated MLN Matters Articles update in Section 3.15.
1.10	01/28/2015	J. Skreba	Added instructions for loading HTML files and updated SME list.
1.11	06/17/2015	L. Smith	Updated “Federal Regulations” section process and OFR and folder URLs
1.12	06/18/2015	J. Skreba	Updated epub instructions and updated URL for clearing your browser cache instructions.
1.13	06/26/15	J. Skreba	Updated links to replace User Voice links with FAQ links for help content; removed PBEG Web Log instructions since it's obsolete.
1.14	09/17/15	L. Smith	Added Section 4.9 - Adding Videos for the CM Seminar Series
1.15	12/15/15	J. Skreba	Updated Section 11.2 and 12 with WNMG emergency contact info.
1.16	02/10/16	L. Smith	Updated Section 3.5, added Note to Table 8 -14 about updating downloads on Center Pages.
1.17	02/18/16	D. Shellem	Updated Section 3.15.6 with steps to post eNews with their new template.

Version Number	Date	Author/Owner	Description of Change
1.18	02/29/16	D. Shellem	Added Section 13.1.1 providing Tealium Code for MLN HTML products to be tracked via Google Analytics.
1.19	02/29/16	L. Smith	Updated Section 3.15.3 to clarify for new MLN Matters Articles, the “MM Article Release Date” is the date the MLN Matters Article is being entered into Percussion.
1.20	06/11/16	L. Smith	Updated large Percussion file size with AMA agreement link
1.21	06/15/16	D. Shellem	Updated FAQ link to Section 1.1, updated link to Percussion in Sections 3.1 and 4.1
1.22	08/31/16	J. Skreba	Removed e-pub and QR code instructions from Section 3.15 (no longer done) and acronyms list; updated the SME table in Section 12.0.
1.23	10/27/16	D. Shellem	Revised eNews posting instructions for new content editor
1.24	02/09/17	L. Smith	Revised eNews posting instructions for the bottom format with MLN logo and no bottom horizontal line
1.25		M. Johnson	Add section 3.15.7 for updating Performance Data web page for DCPC.
1.26	03/22/17	L. Smith	Revised section 3.15.4 to remove “Provider eNews” references
1.27	04/19/17	J. Skreba	Added section 11.12 for calendar issue; updated SME table in Section 12.0; updated section 3.15.7.
1.28	04/20/17	L. Smith	Revised section 3.15.6 for HTML updates
1.29	05/16/17	J. Skreba	Updated section 3.3 to remove “design tab” reference. Updated section 3.3.1 to remove “blue section header” for Downloads and Related Links.
1.30	05/17/17	L. Smith	Revised section 3.15.4 to add Description and Keyword sections for list detail page.
1.31	05/18/17	J. Skreba	Updated Section 3.5 to include 508 statement. Added Section 11.13 for PDF viewing issue.
1.32	06/08/17	J. Skreba	Updated Section 3.15.2.3 to include Special Edition articles.

Version Number	Date	Author/Owner	Description of Change
1.33	07/19/17	L. Smith	Updated Table 10a to add "(as provided in the web request form.)" Updated Table 12, #7 to add description and keywords as optional.
1.34	08/08/17	D. Shellem	Updated 5.1 Request for File Uploads
2.0	08/15/17	J. Skreba	Reviewed entire document for outdated information and updated with current information for the following sections: 1.1, 2.4, 3.4, 3.5, 3.6, 3.9, 3.16, 4.9.1, 5.0, 5.1, 9.0, 11.8. Added Section 3.8 for Updating a Dynamic List Item. Added Section 4.9.2 for Adding/Updating You Tube video links.
2.1	10/05/17	L. Smith	Add Note to Section 3.16.6.1 for new HTML postings regarding WNMG approval
2.2	03/01/18	L. Smith	Added notes to the MLN Articles section, 3.16.2 regarding SE MLN Matters Articles
2.3	05/11/18	J. Skreba	Added Section 11.15 for troubleshooting 'Return to List' issue. Updated Section 7 to include publishing runs include weekends.
2.4	10/02/18	J. Skreba	Updated Section 3.16.4 for handling external links in eNews and the eNews template. Added Section 4.9.3 for handling AMA/ADA/AHA code sets in CMSnet. Added Section 12 for Percussion Search Tips.
2.5	11/19/18	L. Smith	Updated Section 3.9 for updating download titles on the widget of a Center Page
2.6	12/17/18	L. Smith	Updated Appendix A, Section 14.1 Google Analytics
2.7	12/31/18	D. Shellem	Added Section 3.17 Top Navigation