

## Completing the BN Workbook Video Transcript - Crosswalk of Changes

Page(s)	Old Version	New Version	Type of Change	Reason for Change
All	The document included a transcription of video narration. "In this recording, you will learn about the responsibilities that a State User has with the Budget Neutrality workbook. There are two chapters in this video: Chapter 1 – Updating the Workbook Chapter 2 – Uploading a Budget Neutrality Workbook to a Deliverable The displayed image highlights the Table of Contents icon on the control panel. Use the Table of Contents icon in the controls to jump to a specific chapter.	The document includes a table with transcription of the video narration in one column and a screenshot of the relevant workbook section in another column.	Revision	To enhance clarity by adding visual context alongside the transcript.
1 (both)	Chapter 1: Updating the Workbook"	"In this recording, state users will learn what tabs they need to populate on the Budget Neutrality workbook."	Revision	To align the transcript with the updated video structure and focus.
1 (both)	"After downloading the template, the State User needs to enter actual quarterly budget neutrality data. This data is entered on the red tabs in the Workbook. The displayed image shows the Excel Workbook with the DY Def tab open and visible. In our example scenario, previously, the State User entered actual information for DY1. Now they have completed entering actual information for DY 2 quarter 1."	"After downloading the workbook from the Download Templates & Instructions page in PMDA, the state needs to enter actual budget neutrality data. This data is entered on the tabs in the workbook which are called out in this video. In this video, we will populate the workbook based on DY2 annual information."	Revision	To align the transcript with the updated video structure and focus.
1 (old), 2 (new)	"The displayed image shows the C Report tab in the Workbook. The first tab a State User updates is the C Report tab. The state needs to copy demonstration expenditure data from the Schedule C Report and paste it into the appropriate sections.  The image highlights that there are four required fields located at the top of the C Report tab. The image highlights the instructions that are at the top of the page based on the video narrative.  For each demonstration, there will be at least two sections which need to be copied – 'MAP Waivers Total Computable' and 'MAP Waivers Federal Share.' Some demonstrations may also have administrative waivers. For these demos, Admin Waivers Total Computable and Admin Waivers Federal Share sections also need to be copied."	"The first tab that needs to be populated is the C Report tab. To populate this tab, the state copies the demonstration's expenditure data from the 'Schedule C' Report and pastes it into the correct sections on the 'C Report' tab. For example, if you are copying MAP Waivers Total Computable data from the Schedule C Report, paste this data on the C Report tab into the section starting at Row 100. Detailed instructions about where to paste copied data are provided at the top of the C Report tab.  "For each demonstration, data needs to be copied into the 'MAP Waivers Total Computable,' 'MAP Waivers Federal Share,' 'ADM Waivers Total Computable' and 'ADM Waivers Federal Share' sections."	Revision	To simplify and clarify instructions for populating the C Report tab.
1 (old), 2&3 (new)	"The displayed image updates to show an example of an Excel file exported from the CMS 64 report. The process of selecting, copying, and pasting sections of the CMS 64 report into the Budget Neutrality Workbook is shown. Each section needs to be copied to the C Report tab individually.  For each section, highlight rows starting from the header reading 'Waiver Name' all the way to the 'Total' row. Then, paste the section in the corresponding row on the C Report tab. Paste MAP Waivers Total Computable section in row 100 and MAP Waivers Federal Share in row 200.	"The video shows an example of copying data from the 'Schedule C' report to the C Report tab. Highlight the data for each section on the 'Schedule C' report and press Ctrl+C to copy the information to your clipboard. After you have copied the information to your clipboard, go to the correctly named section on the 'C Report' tab and select the section's cell titled 'Waiver Name'. Then, paste (Ctrl+V) the clipboard information into the correct section.	Revision	To streamline instructions and align with updated video content.
2 (old), 3 (new)	"The next tab to update is the Total Adjustments tab. If there are adjustments needed for a specific DY and quarter, enter them on this tab.  In this example, adjustments are shown for both DY1 and DY2.	You also need to populate the four fields at the top of this tab. These cells are titled Data Pulled On, For the Time Period Through, Reporting DY, and Reporting Quarter."  "The next tab to update is the Total Adjustments tab. If there are adjustments needed for a specific DY and quarter, enter them on this tab.  A user must select adjustment type from the dropdown menu and enter a description for the adjustment."	Revision	To provide more specific guidance on entering adjustment data.
2 (old), 4 (new)	"The displayed image shows the Workbook opened to the WW Spending Projected tab.  The third tab to update is the With Waiver spending projected tab. If you have projections for future DYs, enter the projected spending on this tab. There should not be any projections for completed DYs.	"The third tab to update is the With Waiver Spending Projected tab. Future projections are populated on this tab. In our example, projected expenditures start with DY3. Be sure to populate the federal share amounts for all corresponding total computable spending projections."	Revision	To update the example and clarify projection entry requirements.
2 (old), 4 (new)	"The next two tabs we'll look at are used to calculate without waiver expenditures. The displayed image shows the Workbook opened to the MemMon Actual tab."	"Data from the next two tabs is used for calculating without waiver numbers."	Revision	To align the transcript with the updated video narration.
2 (old), 4 (new)	"The first tab related to without waiver is the MemMon Actual (Member Month Actual) tab. On this tab, enter the total number of member months based on the actual number of participating beneficiaries."	"The first tab is titled MemMon Actual (Member Month Actual). Enter the number of months based on the actual number of participating beneficiaries."	Revision	To update the example and clarify projection entry requirements.
2 (old), 5 (new)	"The displayed image shows the Workbook opened to the MemMon Projected tab.  The next tab is the MemMon Projected (member month projected) tab. Enter the total number of member months based on the projected number of participating beneficiaries for each remaining DY.  In this example, DY2 shows the projected member months for quarters 2 through 4.	"The next without waiver tab is titled 'Mem Mon Projected' (member month projected). Populate all projected DYs with the correct total number of member months, based on the projected number of participating beneficiaries."	Revision	This revision provides more streamlined instruction.

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2 (old), 5&6 (new)	<p>"The displayed image shows the Workbook opened to the Summary TC tab."</p> <p>The last tab a State User may need to populate information on is the Summary TC tab. The image highlights the location of the Base Variance section in the Workbook.</p> <p>In the Base Variance Section, if a demonstration has dual demonstration savings, a State User should enter the 1115A dual demonstration estimated savings and the 1115A Dual Demonstration Savings (OACT certified) for each future DY.</p> <p>'OACT certified' fields are populated when the numbers are certified. Certified numbers replace estimated savings amounts. The two savings amounts should not overlap for the same DY. Both estimated and certified numbers must be negative, as the savings information will reduce the Net Variance amount."</p>	<p>"Even though the Summary tab is a tab that prepopulates with data from other tabs, sometimes the state may need to populate a few fields on this tab. These fields are highlighted in yellow.</p> <p>"The fields that may need state information include the following:</p> <p>In the Base Variance section, two rows are highlighted. One highlighted row is the 1115 A Dual demonstration savings (state preliminary estimate) and the other highlighted row is the 1115 A Dual Demonstration Savings (O A C T certified).</p> <p>If a demonstration has dual demonstration savings, the State should populate the dual demonstration estimated savings and the certified savings in the correct cells. Certified numbers replace estimated savings amounts. The two savings amounts should not overlap for the same DY. Both estimated and certified numbers must be negative, as the savings information will reduce the Net Variance amount."</p>	Revision	To clarify when and how to enter dual demonstration savings.
	<p>"The image highlights the buttons at the top of the Summary TC tab that allow a user to change the factors used to display calculated budget neutrality. When you review cumulative budget neutrality information, there are two ways you can adjust the data that is displayed.</p> <p>First, at the top of the tab, you can change which DYs are used to calculate budget neutrality. To change the DYs used for budget neutrality calculation, use the drop-down menus for BN reporting start and end DY. Click Reset to switch to the default DYs which correspond to the current period of performance of the demonstration.</p> <p>Second, you can select if you want to see only actual expenditures or actuals and projected expenditures."</p>	<p>"On the Summary tab, under the demonstration name and number at the top of the tab, you can adjust how budget neutrality information is displayed by selecting different buttons.</p> <p>First, you can select which DYs are used to calculate budget neutrality. The Budget Neutrality reporting start and end DY fields have drop-down menus. Use the drop-down menus to select a different DY start and end range. Click Reset to Defaults to display all DYs that correspond to the current demonstration's performance period.</p> <p>Second, there is a selection button labeled Actuals + Projected. You can select this button to see a drop-down that allows you to select either Actuals Only or Actuals + Projected (the default).</p> <p>Third, there is a selection button labeled Total Computable BN. You can select this button to see a drop-down that allows you to select either Total Computable BN (the default) or Federal Funds BN only. "</p>	Revision	To provide additional information about the Total Computable BN button.
3 (old), 7 (new)	<p>"After you have updated actual and projected numbers, you are ready to submit the Budget Neutrality Workbook as part of a deliverable. When you upload the file to the PMDA system, the system checks for data issues. Errors are discussed in the next chapter."</p> <p>"Chapter 2: Uploading a Budget Neutrality Workbook to a deliverable</p>	<p>"After you have populated the Budget Neutrality workbook, the workbook must be uploaded to the Budget Neutrality report deliverable that corresponds to the DYQ that is being reported. During upload, the system checks for data issues."</p>	Revision	To clarify the upload process and align with updated video narration.
3 (old)	<p>The displayed image shows an example of the PMDA State Demonstration page showing demonstrations for a specific state. When a State User is ready to submit the Budget Neutrality Workbook for CMS review, they click Deliverables under Actions to go to the Deliverables page.</p> <p>The displayed image shows an example of the Deliverables page. Use the filters to limit the list of displayed deliverables.</p> <p>On the page, the user filters by deliverable type Quarterly Budget Neutrality Report.</p> <p>To upload the populated Budget Neutrality Workbook, click Upload/View Docs under the Actions column. The displayed image shows an example of the Deliverable Details page for the selected deliverable. The Override Budget Neutrality Requirement indicator is available at the top of the page.</p> <p>In the Add a New State File section, click Choose File and then click the file name to upload. Click Open. You may also enter a file description. Then click Upload File."</p>	<p>This text is not present.</p>	Removal	To remove detail on how to upload the workbook to PMDA that is no longer shown in the video.
	<p>"The system validates the uploaded Workbook for errors. If critical errors are detected, you must resolve the errors before you can upload the Workbook. The displayed image shows the Deliverable Details page with a pop-up box identifying non-critical issues. These issues are also displayed in the image in a green box.</p> <p>For non-critical errors, a window with a list of the errors is displayed. You may either change the Workbook to resolve the error and re- upload the file or you may override the errors.</p> <p>The displayed image shows the Alert message in the List of State Uploaded Files section that is visible to CMS reviewers. The Project Officer can review the non-critical errors during deliverable review. To submit the deliverable for CMS review, you need to change the status."</p>	<p>"Let's briefly discuss some examples of data issues that may be flagged. There are two types of messages that may be displayed to a state user after upload: Critical and non-critical.</p> <p>Critical messages indicate required data is missing from the workbook or the wrong version of the template was uploaded. PMDA displays an Error message that describes the issue. Critical errors must be resolved before you can upload the file to the deliverable.</p> <p>Non-critical messages identify possible data issues. After the Success message displays indicating successful upload of the workbook, any non-critical messages are displayed. After reviewing the displayed messages, the state can either make changes to the workbook and re-upload the file or the state can decide to proceed without making changes.</p> <p>If no change is made, CMS reviewers will be able to review all unresolved non-critical messages."</p>	Revision	To clarify the types of system messages and user options after upload.

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	<p>"Scroll down to Step 2, Submit to CMS for Review, and click the blue Submit for CMS Review button. If you try to set status equal to Ready for CMS Review before you upload the Budget Neutrality Workbook, the system displays an error message.</p> <p>You must upload the Budget Neutrality Workbook or select the Override indicator at the top of the page.</p> <p>The image updates with a note pointing out that the Override indicator is removed after you have uploaded a file.</p> <p>When you select Override, you must also enter an explanation for your request to override the budget neutrality requirement. On the Deliverables page, a status of "Submitted" is displayed for the deliverable. The displayed image shows the PMDA Deliverables page with the status for the submitted deliverable.</p> <p>The appropriate CMS resources receive an email notification that the deliverable has been submitted for review. The Project Officer can accept the Budget Neutrality Workbook or can request submission. The displayed image shows how to scroll down the Demonstration View Only page to review the updated deliverable status.</p> <p>For requests to Override the Budget Neutrality Workbook requirement, the Project Officer can either accept the request or request re-submission."</p>			
3&4 (old)		This text is not present.	Removal	To remove detailed submission steps no longer shown in the video.
4 (old), 8 (new)	"This concludes this video that reviewed how a State User populates the template with actual information and how to add the Budget Neutrality Workbook to a deliverable submission."	"This concludes this video describing how state users populate the appropriate tabs on the Budget Neutrality workbook and the types of messages that may display after upload."	Revision	To reflect updated video conclusion and summary of content.