CMS
CENTERS FOR MEDICARE & MEDICAID SERVICES

PERM Eligibility Tracking Tool (PETT) 2.0 Website Training

Round 4 Pilot Findings

May 4, 2016 &
May 5, 2016

Agenda

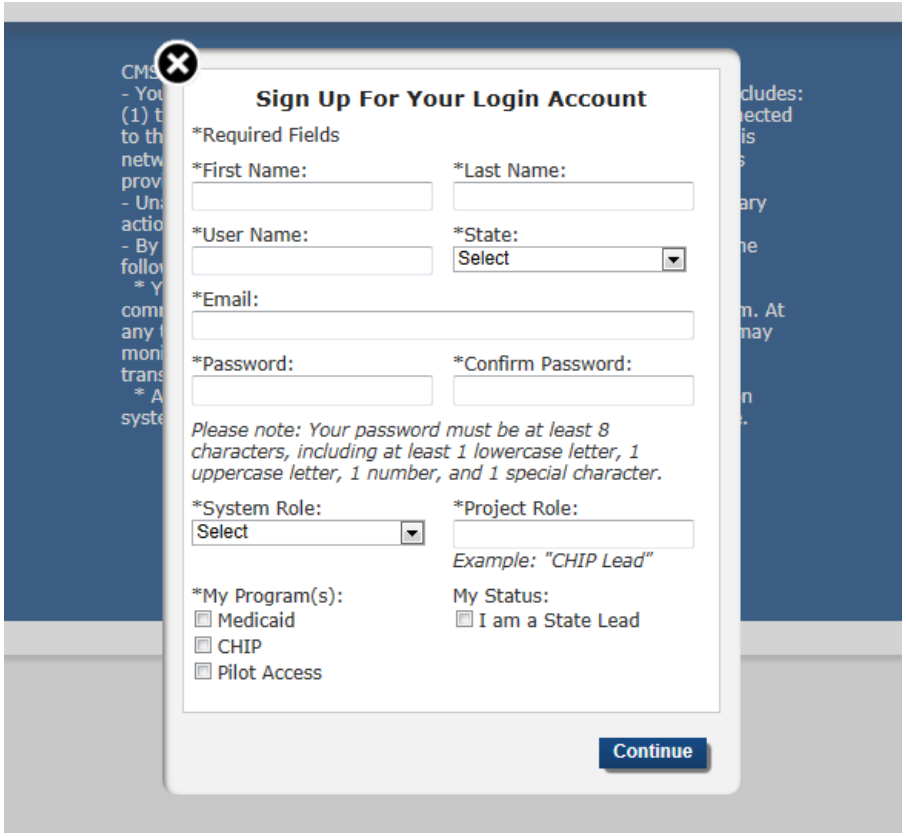
- State Roll Call and Introductions
- PETT 2.0 Overview
- Summary of Round 4 Findings Features
  - Round 4 Pilot Findings Spreadsheet
  - Round 4 Pilot Findings CAP Report
  - Overview of Business Rules
- Demonstration of PETT 2.0 Website
- State Questions

PETT 2.0 Registration

- Users will need to register for the site by going to the website https://www.cmspett2.org/my.policy if they do not already have an account
  - Individuals who already have accounts will not need to re-register
  - States are required to keep their contacts updated in PETT 2.0, as discussed further in Slide 6
- States may register up to three users with one of the following levels of access:
  - Administrative users can input, edit, and review data
  - Read-only users can only view previously submitted data
  - If a new individual needs access to PETT 2.0, please email perm.eligibility@lewin.com
- Each state will only be able to view its own data

Registration Process

- Users must select “Pilot Access” as their designation, under “My Program(s)”
  - Do not select “Medicaid” or “CHIP”
- New users will need to create a case-sensitive user name and password
  - Once a user registers, Lewin will approve the account and the user will receive an email noting that it has been approved



PETT 2.0: Changing Passwords

- PETT 2.0 passwords expire every 60 days, at which point users will be required to create a new password to login
  - The PETT 2.0 system will notify users when the passwords are about to expire through email notification reminders
    - The email notifications will stop once passwords have been successfully changed
- Users should click on the "Forgot Password" link on the Secure Logon page
  - The user will then be taken to a new page where they will click "Reset Password" and then will enter their username
  - An email will then be sent to the user with a link and instructions for changing the password
- **Tip**: If you receive an error message when logging into PETT 2.0 the user should follow the necessary steps to change their password

PETT 2.0: Login Process

- When a user navigates to the PETT 2.0 website, they will need to select the **green** link noting that "You accept these terms and conditions"
  - Users will then be prompted to enter their case-sensitive user name and password and click the "Logon" button
  - Users will receive an email with a one time password each time they login to PETT 2.0
    - Please check your junk folder if you do not receive this email right away
  - After entering the username and password, users will have to enter this 6 digit password in order to access to site
    - **Note:** The one time passwords will expire 15 minutes after the email is sent. Users should check their junk folder if they do not receive it
- If a user is inactive for 15 minutes, the user will have to login again to continue working

Contact Information

- States must update the contact information on the PETT 2.0 site as individuals join or leave the team
  - Select "View State Details" under the "State Profile" tab

- Under the "Contacts for [State]" heading, enter information for each individual that will need to be included on pilot related emails and trainings

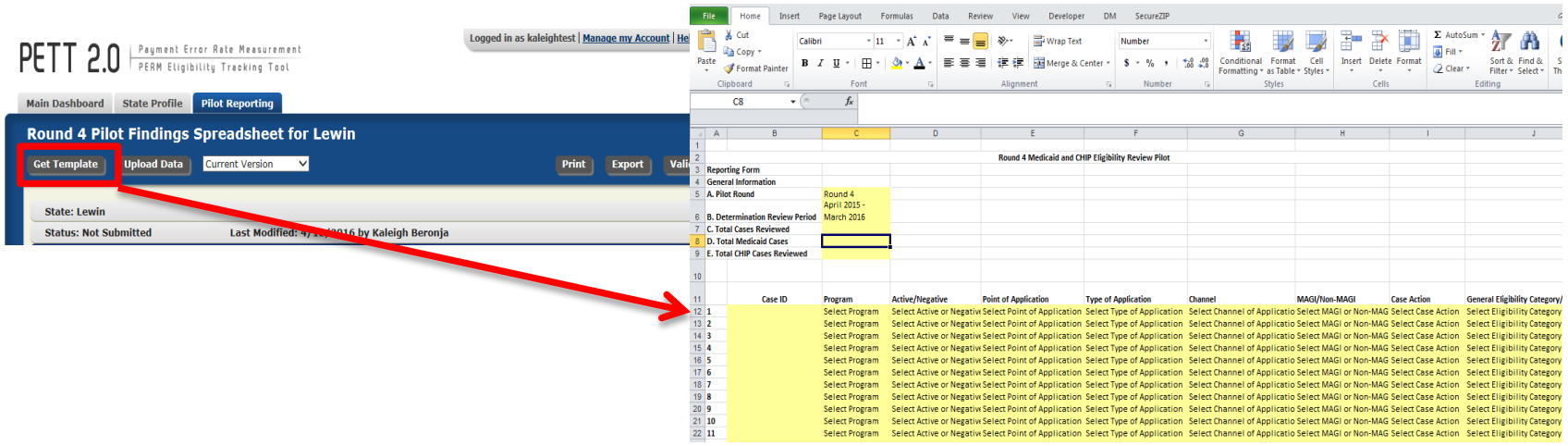
Round 4 Pilot Findings Overview

- Similar to the previous round, there are two components of the Round 4 Pilot Findings:
  - The Round 4 Pilot Findings Spreadsheet will be used by the states to enter the findings on all cases reviewed. The spreadsheet is then uploaded to PETT 2.0

  - The Round 4 Pilot Findings Corrective Action Plan (CAP) will be used by the states to provide additional analysis on the cases reviewed, enter corrective actions on those cases, and provide updates on the corrective actions from the previous rounds of pilots (including the Round 1 and Round 2 ESC pilots)

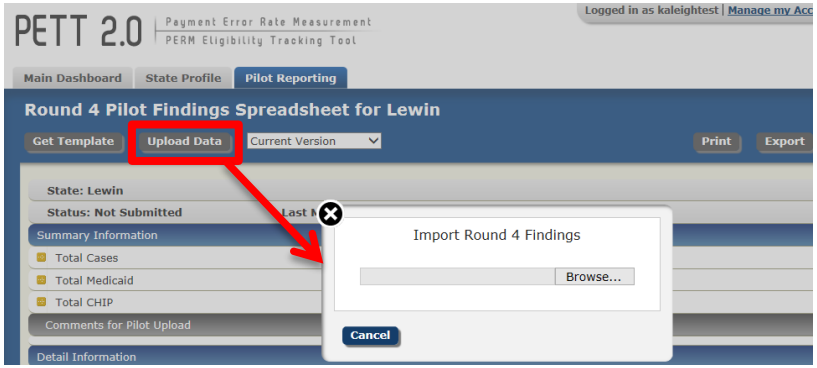
Round 4 Pilot Findings Spreadsheet

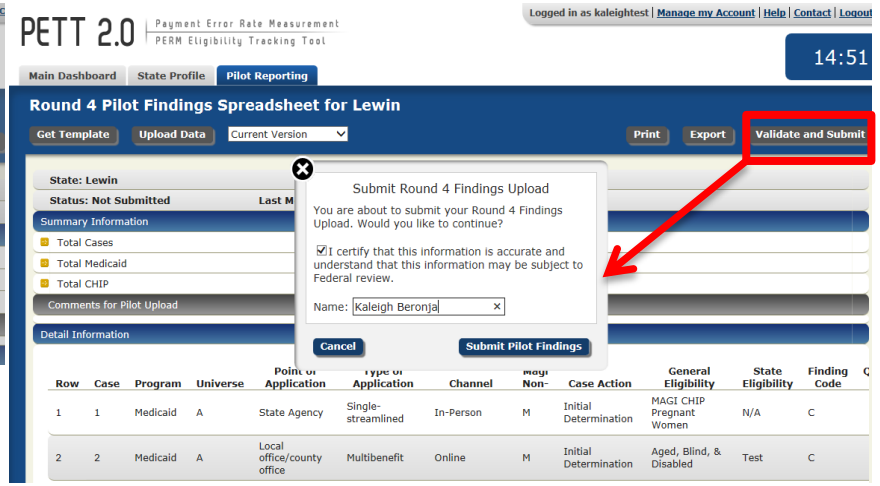
- The Round 4 Pilot Findings Spreadsheet can be downloaded directly from the PETT 2.0 website
  - Users should navigate to "Round 4 Pilot Findings Spreadsheet" under the Pilot Reporting tab
  - Once there the user should select the "Get Template" link on the top left corner of the page
  - **Note:** Users should save this version of the template in case edits or updates are required



Round 4 Pilot Findings Spreadsheet

- Once the Round 4 Pilot Findings Spreadsheet has been completed, users will be required to upload it to PETT 2.0
  - In the same form, users should select the "Upload Data" button on the right side of the "Get Template" button
  - Once the data has been processed into PETT 2.0, users should confirm that it is accurate before selecting "Validate and Submit" on the top right corner of the page
  - **Note**: States must validate and submit their Round 4 Pilot Findings Spreadsheet before the Round 4 Pilot Findings CAP can be submitted to CMS for review





Round 4 Pilot Findings Spreadsheet: Business Rules

- All business rules for the Round 4 Pilot Findings Spreadsheet are outlined in the CMS guidance, and include:
- All fields in the Excel document must be completed in order to successfully upload the spreadsheet to PETT 2.0, with the exception of columns M through Y
  - **New**: States will be required to report the eligibility category for all active cases. The two columns (J and K) are not required for Negative cases
- If "Other" is selected for the Point, Type, or Channel of Application, at least one of the two optional fields must be populated
- If the case review finding was an eligibility error, deficiency, group error, or undetermined "Qualifier 1," and "Caseworker or System Error/Deficiency - Qualifier 1" must be populated
- If the case is Undetermined, the Primary Qualifier 1 must have qualifier 20 reported, and there must be at least one additional qualifier reported

Round 4 Pilot Findings CAP

- The Round 4 Pilot Findings CAP can be accessed by selecting "Round 4 Pilot Findings CAP" from the Pilot Reporting tab
  - Once the user is in the form, they will be able to edit information by selecting the "Edit" button on the top right corner of the page
- This form contains a total of 16 sections
  - **Note:** Sections 3 – 14 will be partially pre-populated with numbers from the Round 4 Pilot Findings Spreadsheet
  - **New**: Sections 3 – 10 will also be pre-populated with numbers from the Round 3 Pilot Findings Spreadsheet
  - Users should utilize the "Save Progress" button on the top right corner of the form frequently to ensure that information is not lost
- Once all information is entered, users will select the "Validate and Submit" button to submit this component of the Round 4 Findings to CMS

Round 4 Pilot Findings Submission

- States will be required to validate and submit the two components of the Round 4 Pilot Findings separately
  - **Note**: Users cannot submit their Round 4 Pilot Findings CAP until the Round 4 Pilot Findings Spreadsheet has been submitted
- Although the Round 4 Pilot Findings Spreadsheet might be submitted before the CAP report, it will not be formally approved until CMS has also reviewed and approved the Round 4 Pilot Findings CAP

Round 4 Pilot Findings Review

- Upon completing the review, CMS will either change the status of each part to "Approved" or, if comments are provided, to "Submitted – State Revising"
  - If comments are provided on the Round 4 Pilot Findings Spreadsheet, the state will have to make necessary edits and updates to the spreadsheet outside of PETT 2.0, re-upload the spreadsheet, and resubmit for review
  - If comments are provided on the Round 4 Pilot Findings CAP, the state will make necessary edits and updates directly in PETT 2.0, as in previous rounds, and resubmit
- While the findings are under CMS review, the state will not be able to make edits, nor will they be able to view any comments

Round 4 Pilot Findings Updates

- If additional edits are needed from the state, state users will receive a notification that the status has been changed to "Submitted – State Revising"
  - The notification will specify the component of the Round 4 Pilot Findings for which edits or additions are needed
- Once CMS approves both components of the Round 4 Pilot Findings, states will be unable to make further edits
  - However, if the state identifies areas that need to be changed or updated, the state should contact CMS to let them know

Contact Information

- PETT Website:
  - https://www.cmspett2.org/my.policy
- The Lewin Group PERM Contact:
  - perm.eligibility@lewin.com
- CMS Eligibility Contact:
  - FY2014-2016EligibilityPilots@cms.hhs.gov