



CMS-64 Expenditure Journey: Aadya, State User

“The data is in Excel with almost a tab for every form. I go tab by tab, form by form, and key in the data which takes several days.”

Aadya’s team has prepared the data for the quarter and she begins entering data into the system. She keys in data for standard forms, then adds additional forms, waivers and feeder forms as needed. For reviews, she answers questions her State reviewer may have. She also answers questions or provides additional documentation for the CMS reviewer. She runs additional reports as needed for State needs.

	Data is Prepared	Data Keyed into MBES Forms		State Review/Certification	CMS Review	Additional Reports
Actions	<p>Aadya’s journey begins after the State data is prepared:</p> <p><i>States compile data from MMIS or in-house systems</i></p> <p><i>Data exported to Excel (almost a tab for every form)</i></p> <p><i>Pivot tables added to Excel doc for MBES format</i></p> <p><i>Isolate anything that is a prior pd.</i></p> <p><i>Data broken down as needed to facilitate federal mandate</i></p> <p><i>FMAPs are updated in Excel if it’s a new FY</i></p> <p>Aadya’s journey begins</p>	<ul style="list-style-type: none">Keys data into multitude of forms, i.e. standard forms, waivers, feeder forms, PPAs.Uses Quick Entry where possibleReaches out to CMS contact for assistance if needed, i.e. help entering data for new programRuns APD reports	<ul style="list-style-type: none">Runs various output reports for validation or other purposes, i.e. Summary Report, 64.9, 64.9 Base, 64.9 WAIV, Variance Analysis, etc (Runs same reports each qtr)If Variance is found, searches for cause and makes corrections*Uses print-friendly option to do validation (copies data into Excel to sort and filter)	<ul style="list-style-type: none">Sends to State team member for internal reviewAnswers questions the State reviewer may haveMakes changes/corrections if neededState review completed; State certifies CMS-64 submission	<p><i>Submission reviewed by CMS analyst</i></p> <ul style="list-style-type: none">Provides additional data or documentation to CMS if needed <p><i>If CMS analyst finds discrepancy the report is uncertified</i></p> <ul style="list-style-type: none">If error is found, Aadya finds and corrects it <p><i>CMS-64 recertified; approved by CMS</i></p>	<ul style="list-style-type: none">Finds additional output reports she needsDownloads reports to Excel; manipulates data as needed; runs macros her team createdRuns additional reports for State needs as requested throughout the year
Emotions/Pain Points	<ul style="list-style-type: none">HappyUnhappyConfusedThinking/wishing	<ul style="list-style-type: none">Why do I have to scroll down this long list of forms?PPAs are so messy and just difficult!Quick entry is helpful, I’d like to be able to use it more.I haven’t received instructions on this new program. I’ll have to reach out to CMS for help.Why are all these expired APDs shown? It’s so confusing.	<ul style="list-style-type: none">Why can’t there be a summary report with a drill-down to details?I wish I could see feeder details in my final report for easier recon.I wish I could save the reports I run to a list and just change the quarter details.It took 30 minutes to find that variance!*I’d like to be able to download each output report to help with validation.	<ul style="list-style-type: none">It’s impossible to manually key in hundreds of numbers without making an error. Having a template that we can fill in and upload would be such a time saver.	<ul style="list-style-type: none">I wish the system could identify errors or compare our CMS-64 submission to our CMS-37.It’s major success when our report is certified and our work is done!	<ul style="list-style-type: none">I’m never sure where to find reports or what data they will produce.I’d like the ability to customize or create ad-hoc reports so I can easily generate the data my State needs.
Touchpoints		<ul style="list-style-type: none">Compiled data/spreadsheetsAnalysts who prepared the dataState prepared guidance and cheat sheetsMBES	<ul style="list-style-type: none">Other team members for assistance as neededCMS contact for help and guidance	<ul style="list-style-type: none">Team member completing the state reviewMBESPrepared spreadsheets/data	<ul style="list-style-type: none">CMS ReviewerMBESPrepared spreadsheetsTeam members for help if needed	<ul style="list-style-type: none">MBESOther team members for help with Excel data, macros, etc.
Opportunities		<ul style="list-style-type: none">Ability to upload data to eliminate keying errors and save several days of keying timeAbility to sort and filter all reports and waivers, i.e. by yearHelp users find reports they need; consider the ability to search for reports by nameResolve variance issues caused by number roundingMake it easier to do prior period reporting, overpayments, and TPLBuild-in functionality that helps prevent errorsProvide a higher-level summary report that drills down to detailsMore guidance & notifications from CMS about changes or new mandates*Functionality currently exists in MBES but users are not aware of it. Increase user training sessions; provide regular “did you know” functionality tips via the system		<ul style="list-style-type: none">Ability for system to compare budget to expendituresIf a variance is found the system flags it, and the location, for the user	<ul style="list-style-type: none">Ability to upload data via a template will prevent many errorsAbility for State users and CMS analyst to communicate via the system	<ul style="list-style-type: none">Ability for users to save reports to a favorites listAbility to create ad-hoc reports