2021 (old version)	2023 (new version)	Type of Change	Reason for Change	Burden Change
Monitoring workbook included separate tabs for the Annual Availability Assessment	Split the workbooks into "Monitoring Report Workbook" and "Annual Availability Assessment"	Revision	Changes are intended to improve clarity and user experience	No
Header information located in column B	Moved header information to column A in the "SMI - SED metrics" and "SMI - SED reporting issues" tabs	Revision	Changes are intended to improve clarity and user experience	No
Workbook made references to "DYQ"	Changed any mention of DYQ to DY#Q# (i.e., Format DYQ to Format DY#Q#)	Revision	Changes are intended to improve clarity and user experience	No
Metric names and descriptions aligned with Version 3.0 of the SMI/SED technical specifications manual	Updated metric names and descriptions to align with Version 4.0 of the SMI/SED technical specifications manual	Revision	Changes are intended to align the workbook with the most up-to-date version of the SMI/SED technical specifications manual available to states	No
Workbook was locked	Unlocked the workbook to allow the state to hide rows and columns, copy and paste full rows or columns of data, and add columns or rows to facilitate that state's reporting of SMI-SED demonstration monitoring data	Revision	Changes are intended to improve user experience	No

Type of Change: Rev = Revision, Del = Deletion, Add = Addition, and Red = Redesignation.

Workbook made references to SMI/SED Metrics #3, #5, #27, and #28	Removed references to Metric #3 (All-Cause Emergency Department [ED] Utilization Rate for Medicaid Beneficiaries who may Benefit From Integrated Physical and Behavioral Health Care [PMH-20], Metric #5 (Medication Reconciliation Upon Admission), Metric #27 (Tobacco Use Screening and Follow-up for People with Serious Mental Illness or Alcohol or Other Drug Dependence), and Metric #28 (Alcohol Screening and Follow-up for People with Serious Mental Illness) within the "SMI - SED metrics" and "SMI - SED reporting issues" tabs	Revision	Changes are intended to reflect that CMS no longer requires reporting of these metrics	Yes - Removal of these metrics may reduce time state spends on completing Monitoring Report Workbook
N/A	Added a new column "State will report (Y/N)" (column H) to the "SMI - SED metrics" tab, which the state can populate using information in its approved monitoring protocol	Addition	Change is intended to improve user experience by aiding eventual PMDA functionality	No
N/A	Modified the name of column J ("Deviations from CMS-provided technical specifications manual or other considerations in approved monitoring protocol") in the "SMI - SED metrics" tab to clarify that this column documents approved deviations from the technical specifications manual as well as other considerations, such as the methods a state uses to calculate certain metrics and identify subpopulations for reporting	Revision	Changes are intended to improve clarity and user experience	No
Column K in the "SMI - SED metrics" tab contained drop-down options only for Versions 1.0 and 2.0 of the SMI/SED technical specifications manual	In the "SMI - SED metrics" tab, added two additional options ("Version 3.0" and "Version 4.0") to the drop-down in column "Technical specifications manual version" (column K) to reflect the latest available technical specifications manual	Revision	Changes are intended to align the workbook with the most up-to-date version of the SMI/SED technical specifications manual available to states	No
"SMI - SED metrics" tab contained 15 blank columns (BH-BV) in which a state could report data on state-specific subpopulations	In the "SMI - SED metrics" tab, added 15 more blank columns (BW-CK) in which a state can report data on five additional state-specific subpopulations	Addition	Changes are intended to improve user experience	No

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N/A	In the "SMI - SED metrics" tab, added two footnotes: - Footnote b, which clarifies that the values reported for the "demonstration reporting" category may equal the "state-specific definition of SMI" - Footnote d, which outlines instructions for any state that claims federal financial participation (FFP) for services provided in Qualified Residential Treatment Programs (QRTPs) that are IMDs	Addition	Changes are intended to improve clarity	No
N/A	Noted at the bottom of the "SMI - SED metrics" tab that beneficiary counts across related subpopulations should sum approximately to the overall count in column P ("Demonstration reporting numerator or count") and provided some examples for how to confirm this	Addition	Changes are intended to improve clarity and user experience	No
N/A	Added a "State-specific metrics" section to the bottom of the table in the "SMI - SED reporting issues" tab	Addition	Changes are intended to improve clarity and user experience	No
Tabs contained conditional formatting	Removed all conditional formatting from the "SMI - SED planned metrics" and "SMI - SED planned subpops" tabs	Revision	Changes are intended to improve user experience	No
N/A	Made minor modifications to row and column names in the "SMI - SED planned metrics" and "SMI - SED reporting schedule" tabs	Revision	Changes are intended to improve clarity and user experience	No
Workbook made references to SMI/SED Metrics #3, #5, #27, and #28	Removed references to Metric #3 (All-Cause Emergency Department [ED] Utilization Rate for Medicaid Beneficiaries who may Benefit From Integrated Physical and Behavioral Health Care [PMH-20], Metric #5 (Medication Reconciliation Upon Admission), Metric #27 (Tobacco Use	Revision	Changes are intended to reflect that CMS no longer requires reporting of these metrics	Yes - Removal of these metrics may reduce time state spends on completing Monitoring Report Workbook

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