

2021 (old version)	2023 (new version)	Type of Change	Reason for Change
Header information located in column B	Moved header information to column A for "SMI - SED planned metrics," "SMI - SED planned subpops," and "SMI - SED reporting schedule" tabs	Revision	Changes are intended to improve clarity and user experience
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
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
N/A	Added drop-down options for state-specific metrics in the "SMI - SED Planned Metrics" tab	Addition	Changes are intended to improve clarity and user experience
N/A	<p>In the "SMI - SED reporting schedule" tab, added instructions for completing "Table 1. Reporting Periods Input Table" if a state's demonstration starts on any day other than the first of the month (footnote a) and added the following three related rows to Table 1:</p> <ul style="list-style-type: none"> <li>- "Dates of first SMI/SED demonstration year" (row 11)</li> <li>- "Start date" (row 12)</li> <li>- "End date" (row 13)</li> </ul>	Addition	Changes are intended to improve clarity and enhance the accuracy of information autopopulated in Table 2 ("Serious Mental Illness and Serious Emotional Disturbance Reporting") of the "SMI - SED reporting schedule" tab
N/A	In the "SMI - SED reporting schedule" tab, added the "SMI/SED reporting period" column (column E), which will be automatically populated, to Table 2 to indicate the SMI/SED demonstration year and quarter associated with each monitoring report	Addition	Change is intended to improve clarity by distinguishing the state's SMI/SED reporting period from its broader section 1115 reporting period in column D

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<p>Tabs contained conditional formatting</p>	<p>Removed all conditional formatting from the "SMI - SED planned metrics" and "SMI - SED planned subpops" tabs</p>	<p>Revision</p>	<p>Changes are intended to improve user experience</p>
<p>N/A</p>	<p>Made minor modifications to row and column names in the "SMI - SED planned metrics" and "SMI - SED reporting schedule" tabs</p>	<p>Revision</p>	<p>Changes are intended to improve clarity and user experience</p>
<p>Workbook made references to SMI/SED Metrics #3, #5, #27, and #28</p>	<p>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)</p>	<p>Revision</p>	<p>Changes are intended to reflect that CMS no longer requires reporting of these metrics</p>
<p>N/A</p>	<p>In the "SMI - SED planned metrics" tab, added new instructions and footnotes, including:</p> <ul style="list-style-type: none"> <li>- Instructions in the "State-specific metrics" portion of the table (row 49) detailing how to insert rows for state-specific metrics</li> <li>- Footnote a, which outlines instructions for providing an explanation if a state indicated that it is not planning to report a required metric</li> <li>- Footnote b, which outlines instructions for providing calculation methods for specific metrics</li> </ul>	<p>Addition</p>	<p>Changes are intended to improve clarity and user experience</p>

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N/A	<p>In the "SMI - SED planned subpops" tab, added new footnotes, including:</p> <ul style="list-style-type: none"> <li>- Footnote a, which outlines instructions for providing an explanation if a state indicated that it is not planning to report a required subpopulation category</li> <li>- Footnote b, which outlines instructions for providing additional details on how the state plans to define the "dual-eligible status" subpopulation category (if the state is planning to report data for this category)</li> <li>- Footnote c, which outlines instructions for how to report phased-in subpopulation categories</li> <li>- Footnote d, which clarifies why "standardized definition of SMI" and "state-specific definition of SMI" are included within the list of subpopulation categories</li> <li>- Footnote e, which outlines instructions for any state that claims federal financial participation (FFP) for services provided in Qualified Residential Treatment Programs (QRTPs) that are IMDs</li> </ul>	Addition	Changes are intended to improve clarity and user experience
N/A	Added a new column "State will report (Y/N)" (column K) to the "SMI - SED planned 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
N/A	Modified the name of column P ("Deviations from CMS-provided technical specifications manual or other considerations in approved monitoring protocol") in the "SMI - SED planned metrics" tab to clarify that this column documents approved deviations from the technical specifications manual as well as other considerations, such	Revision	Changes are intended to improve clarity and user experience
"SMI-SED reporting schedule" tab contained "Notes" row above the footnotes at the bottom of Table 2	Deleted the "Notes" row above the footnotes at the bottom of Table 2 in the "SMI-SED reporting schedule" tab	Revision	Changes are intended to improve clarity and user experience

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<b>Burden Change</b>
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No
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No
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No
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No
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No
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No
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No
No
Yes - Removal of these metrics may reduce time state spends on completing Monitoring Report Workbook
No

No
No
No
No

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