State Waiver Management System (WMS) User Training

1915(b) and 1915(c)

September 2019

Table of Contents

Introduction to WMS

WMS Home Page

- ◈ Link to WMS: https://wms-mmdl.cms.gov/WMS/faces/portal.jsp
- ◈ To begin reviewing waivers, select the appropriate link to enter the web-based waiver application—**1915(b)** or **1915(c)**.
- ◈ Once you select the desired application, it will transfer you to the login page.

Changing Password

- ❖ A new user is assigned a default password. It is recommended to change it upon your first login. To do so:
- ❖ Complete the User Name and Password fields but do not select the **Log In** button.
- ❖ Select the **Change Password** link at the top of the screen.

Changing Password (cont.)

◈ The Change Password page will display.

◈ Enter the new password.

◈ To confirm the password, re-enter it.

◈ Once you have re-entered the password, finalize it by selecting **Change** or to void the transaction, select **Cancel**.

◈ Once you have changed your password, you can enter the application by selecting **Finder** in the top menu bar.

Change Password

Passwords must contain 6-15 characters and contain at least one letter and one number with no spaces between. Passwords are case sensitive.

User Name:

New Password:

Confirm Password:

Change   Cancel

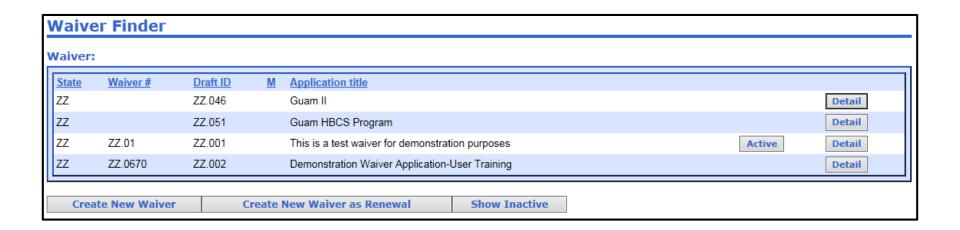# Login Page

◈ To log in, enter your user name and password, then select **Log In**.

◈ Once you have logged in, you will be transferred to the first page within the application, the Finder page.
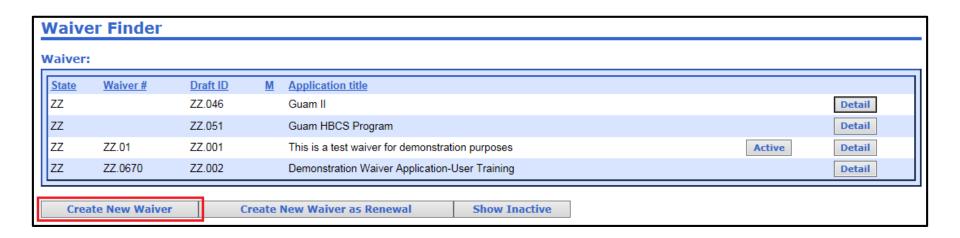
Waiver Finder Page

◈ On the Waiver Finder Page, you are able to:

  ◆ Create a new waiver

  ◆ Create a new waiver as a renewal

  ◆ Access a waiver family

  ◆ View the most current, approved waiver

Create New Waiver

◈ To create a new waiver, select **Create New Waiver** at the bottom of the page.

◈ This will bring you directly to the first page within the waiver, Request Information Page.

Waiver Finder

Waiver:

State	Waiver #	Draft ID	M	Application title		
ZZ		ZZ.046		Guam II		Detail
ZZ		ZZ.051		Guam HBCS Program		Detail
ZZ	ZZ.01	ZZ.001		This is a test waiver for demonstration purposes	Active	Detail
ZZ	ZZ.0670	ZZ.002		Demonstration Waiver Application-User Training		Detail

Create New Waiver	Create New Waiver as Renewal	Show Inactive

Create New Waiver as Renewal

◈ To create a renewal of a waiver that exists only on paper and is not already in WMS, select **Create New Waiver as Renewal** at the bottom of the page. Note: To renew a waiver that already exists in WMS, use the **Create Renewal** button on Page One of the waiver.

◈ Once you make the selection, it will ask for the base waiver number allocated to the waiver on paper. Enter it here.

◈ If, when completing this part, an error message appears saying that the waiver number already exists online, then this may not be the correct option for your situation.

Waiver Finder

Waiver:

State	Waiver #	Draft ID	M	Application title		
ZZ		ZZ.046		Guam II		Detail
ZZ		ZZ.051		Guam HBCS Program		Detail
ZZ	ZZ.01	ZZ.001		This is a test waiver for demonstration purposes	Active	Detail
ZZ	ZZ.0670	ZZ.002		Demonstration Waiver Application-User Training		Detail

| Create New Waiver | Create New Waiver as Renewal | Show Inactive |

Access an Existing Waiver

◈ To access an existing waiver application and its associated amendments and renewals select **Detail**, this will bring you to the Waiver Detail Finder Page.
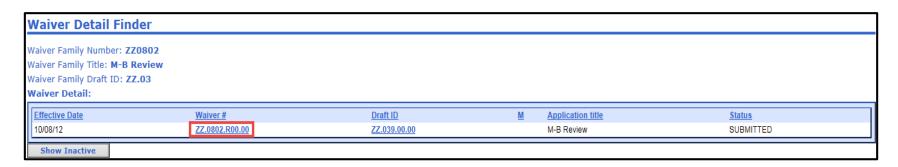
Waiver Finder

Waiver:

State	Waiver #	Draft ID	M	Application title		
ZZ		ZZ.046		Guam II		Detail
ZZ		ZZ.051		Guam HBCS Program		Detail
ZZ	ZZ.01	ZZ.001		This is a test waiver for demonstration purposes	Active	Detail
ZZ	ZZ.0670	ZZ.002		Demonstration Waiver Application-User Training		Detail

Create New Waiver	Create New Waiver as Renewal	Show Inactive

Waiver Detail Finder

◈ The Waiver Detail Finder page shows all waivers, base waivers, amendments and renewals associated with the waiver number, regardless of their status (draft, submitted, unsubmitted, approved, etc).

◈ To access the waiver, select the waiver number link (ZZ.0802.R00.00) under the column, Waiver #.

◈ This will transfer you to Page One of the waiver. Page One contains basic information about the waiver as well as all the necessary actions to begin completing your waiver.

Waiver Detail Finder

Waiver Family Number: **ZZ0802**
Waiver Family Title: **M-B Review**
Waiver Family Draft ID: **ZZ.03**
Waiver Detail:

Effective Date	Waiver #	Draft ID	M	Application title	Status
10/08/12	ZZ.0802.R00.00	ZZ.039.00.00		M-B Review	SUBMITTED

Show Inactive
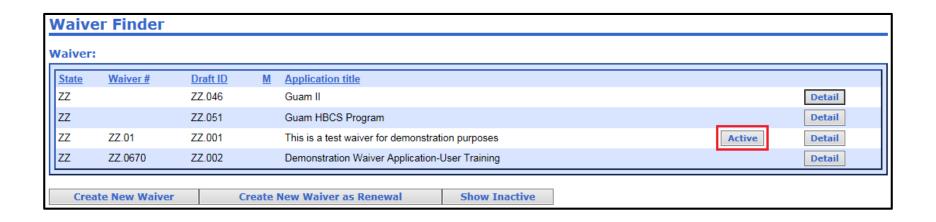
Waiver Numbering

- **Waiver ID:** The number automatically assigned to a waiver when it is submitted. Each group of numbers denotes a different characteristic of the waiver

ZZ 0997 R01 03

- ZZ = State abbreviation (ZZ is the Help Desk test state name)

- 0997 = auto generated number

- R01 = Renewal number
  - Some start at 03, etc. – this means there were renewals on paper prior to WMS system
  - R00 represents a Base waiver

- 03 = Amendment number
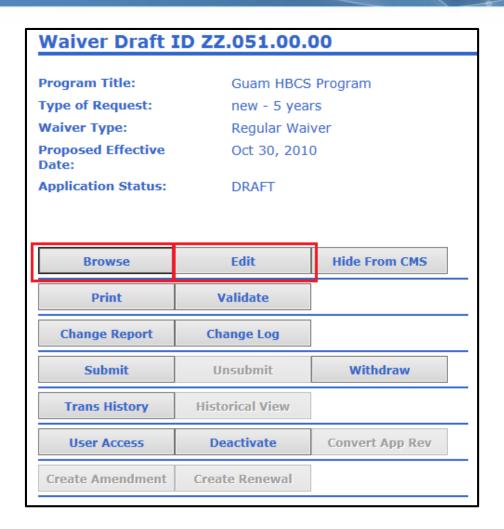 - 00 represents the Base waiver, 01 is the first amendment, etc.

View Current Approved Application

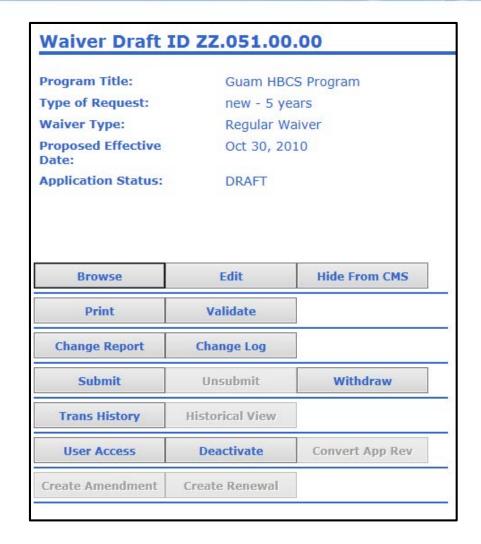◈ To see the most recently approved waiver, whether it is a renewal or an amendment, select **<u>Active</u>**.

Basic Information Page (Page One)

◈ Select **Browse** or **Edit** to enter the application. This will bring you to the first page of the waiver, Request Information Page.

◈ To access the application in "read only" mode, select **Browse**.

◈ To edit the waiver, select **Edit**.

Waiver Draft ID ZZ.051.00.00

Program Title:	Guam HBCS Program
Type of Request:	new - 5 years
Waiver Type:	Regular Waiver
Proposed Effective Date:	Oct 30, 2010
Application Status:	DRAFT

Browse	Edit	Hide From CMS
Print	Validate	
Change Report	Change Log	
Submit	Unsubmit	Withdraw
Trans History	Historical View	
User Access	Deactivate	Convert App Rev
Create Amendment	Create Renewal	

Basic Information Page (Page One) (cont.)

◈ The functions in blue lettering are available to the user. Anything that is greyed out is not accessible.

◈ Functions available are based on the role you are assigned.

◈ Only the State Medicaid Director role has the authority to **Submit**, **Unsubmit**, or **Withdraw** an application.

Waiver Draft ID ZZ.051.00.00

Program Title:	Guam HBCS Program
Type of Request:	new - 5 years
Waiver Type:	Regular Waiver
Proposed Effective Date:	Oct 30, 2010
Application Status:	DRAFT

Browse	Edit	Hide From CMS
Print	Validate	
Change Report	Change Log	
Submit	Unsubmit	Withdraw
Trans History	Historical View	
User Access	Deactivate	Convert App Rev
Create Amendment	Create Renewal	

Create Renewal

◈ To create a renewal of a waiver, select **Create Renewal**.

◈ The renewal must be created off of the current base waiver or base renewal (the waiver ending in .00).

◈ It is not possible to create a renewal from an amendment.

◈ If you choose an incorrect waiver, the **Create Renewal** button will be greyed out.
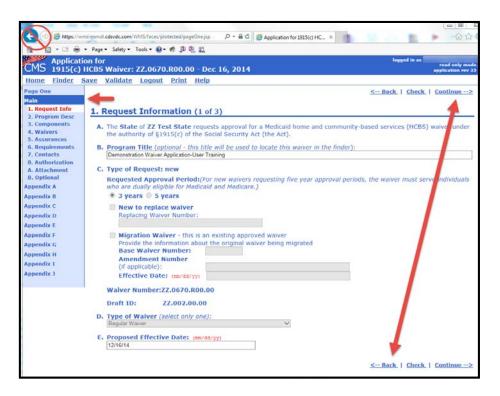
Create Amendment

- ◈ To create an amendment, select **Create Amendment**.
- ◈ An amendment can only be created from the current base waiver or base renewal (the waiver ending in .00), not another amendment.
- ◈ If you choose an incorrect waiver, the **Create Amendment** button will be greyed out.

Navigation

◈ In the waiver, select **Back** or **Continue** on the top or bottom right corners of the waiver page to navigate

◈ Do not use the web browser back and forward arrows to navigate

◈ Left-side Navigation Bar – The navigation bar on the left side of each page allows you to choose which appendix you want to view. There are additional subsections that are only viewable once the appendix is chosen.
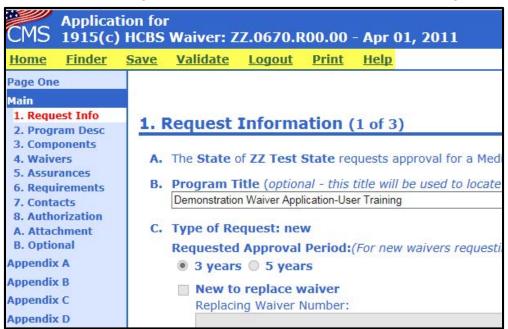
Navigation (cont.)

◈ **Home** – Returns you to the Home Page.

◈ **Finder** – Return you to the Finder Page.

◈ **Save** – Saves the page you are currently completing. The system automatically saves data when you move from page to page or when the page is refreshed.

Navigation (cont.)

◈ **Validate** – Takes you to the Validate Waiver Application Page. This feature checks the appendices to verify that the required fields have been completed.

◈ **Log Out** – Saves your application and exits you from the system.

◈ **Print** – Takes you to the Printing Selection Page. This allows you to print your application by Appendix or in its entirety (see slide 42).
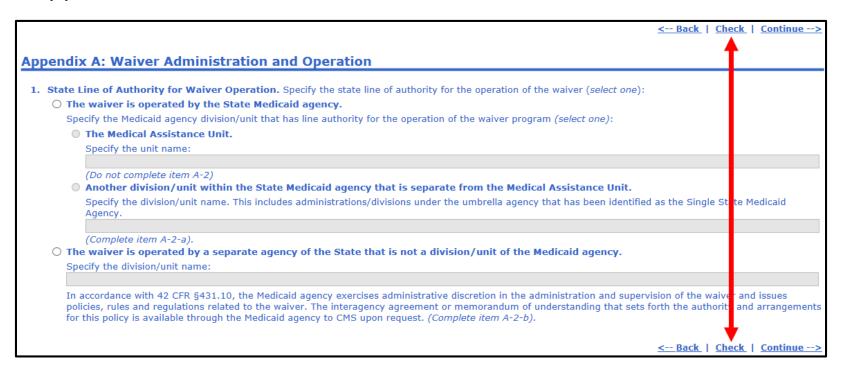
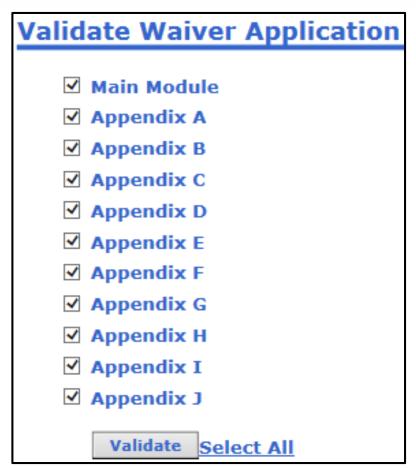# General WMS Functions

Validating Waivers

Check Instructions

◈ To verify the section you are working on is complete, select **Check** at the top or bottom of the page.

◈ This function does not include cross-checks with other sections or appendices.

Validate Instructions

◈ To validate certain appendices or the entire waiver, select **Validate**, which will take you to the Validate Waiver Application page. On the validation page, select the appendix, or appendices you would like to validate. If you would like to validate the entire waiver, select **Select All** which will mark off all the appendices. Once you have selected the appropriate appendices, click **Validate**.

◈ A Validation Report will appear identifying the appendix and the incomplete question.

Validate Waiver Application

☑ **Main Module**
☑ **Appendix A**
☑ **Appendix B**
☑ **Appendix C**
☑ **Appendix D**
☑ **Appendix E**
☑ **Appendix F**
☑ **Appendix G**
☑ **Appendix H**
☑ **Appendix I**
☑ **Appendix J**

Validate Select All

Validation Report

◈ If there are incomplete questions, a Validation Report will appear.

◈ The report provides information on the appendix, sub-section, question and error.

◈ To exit the Validation Report, select ←**Back**.

Validation Report
Reported From Page: validate

Section	Sub-Section	Locator	Validation Check	Error
modI	1	F	Level(s) of Care	No selection made
modI	1	G	Concurrent Operation with Other Programs Applicability	Cannot be blank
modI	6	I	Public Input	Cannot be blank
modI	7	A	Medicaid Agency Representative: First Name	Cannot be blank

Validation Report (cont.)

◈ If there are no errors, the Validation Report looks like the screen below.

Validation Report

Reported From Page: validate

Section	Sub-Section	Locator	Validation Check	Error

No Validation Errors Found.

General WMS Functions

State Actions

(Submit, Unsubmit, Withdraw, Deactivate, Hide)

Submit

◈ Once you have completed the waiver, you are able to submit it.

◈ To submit a waiver, select **Submit** on Page One, which will transfer you to the section Main 1. 8 within the waiver.

◈ On Main 1-8, select **Submit**. The Signature and Submission Date will automatically populate.

◈ The State Medicaid Director role is the only role that can submit the application.

◈ If there are validation errors, then it will not be possible to submit the waiver.

8. Authorizing Signature

This document, together with Appendices A through J, constitutes the State's request for a waiver under §1915(c) of the Social Security Act. The State assures that all materials referenced in this waiver application (including standards, licensure and certification requirements) are *readily* available in print or electronic form upon request to CMS through the Medicaid agency or, if applicable, from the operating agency specified in Appendix A. Any proposed changes to the waiver will be submitted by the Medicaid agency to CMS in the form of waiver amendments.

Upon approval by CMS, the waiver application serves as the State's authority to provide home and community-based waiver services to the specified target groups. The State attests that it will abide by all provisions of the approved waiver and will continuously operate the waiver in accordance with the assurances specified in Section 5 and the additional requirements specified in Section 6 of the request.

Signature: _____

State Medicaid Director or Designee

Submission Date: _____

Submit

Unsubmit

◈ If you have submitted your application but would like to unsubmit the waiver which will take it off of the review clock, it can be unsubmitted.

◈ The State Medicaid Director role is the only role that can unsubmit it.

◈ To unsubmit the waiver, select **Unsubmit** on Page One, which will bring you to the section, Main 1-8.

Unsubmit (cont.)

◈ On the Main 1-8 page, select **Unsubmit**.

◈ Once the application is unsubmitted, it can be edited again.

◈ Note: Once you have made all the necessary changes you must re-submit the application. This will restart the review clock.

8. Authorizing Signature

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Upon approval by CMS, the waiver application serves as the State's authority to provide home and community-based waiver services to the specified target groups. The State attests that it will abide by all provisions of the approved waiver and will continuously operate the waiver in accordance with the assurances specified in Section 5 and the additional requirements specified in Section 6 of the request.

Signature:	Jim Michalowski
	State Medicaid Director or Designee
Submission Date:	Aug 21, 2012

UnSubmit

Note: The Signature and Submission Date fields will be automatically completed when the State Medicaid Director submits the application.

Activate/Deactivate and Hide/Unhide

Activate/Deactivate

❖ The State Medicaid Director and Sys/Op Manager are able to designate any DRAFT waiver as inactive in order to hide it on the Finder Page. Once a waiver is deactivated, it is no longer editable.

❖ Conversely, a deactivated draft waiver can be reactivated, enabling it to be viewable as well as editable again.

❖ A deactivated waiver is automatically hidden.

Hide/Unhide

❖ The Hide/Unhide feature hides or un-hides the DRAFT waiver that has been designated as inactive.

❖ Only waivers that are deactivated can be hidden.

Activate/Deactivate and Hide/Unhide

◈ Deactivating and hiding a waiver is useful when a renewal or amendment is accidently created. It is not possible to delete a waiver, therefore an alternative is to deactivate it and hide it.

◈ To deactivate a waiver, select, **Deactivate**.

◈ To hide the waiver, select **Hide Inactive**.

Unhiding Inactive Applications

◈ To view the waivers that were hidden, select **Show Inactive**.

◈ This function will show any inactive hidden waivers.

◈ This function can be found on the Finder page and on the Waiver Detail Finder page.

Withdraw

◈ The State Medicaid Director role is the only role that can withdraw a waiver.

◈ Withdrawing a waiver takes it out of contention.

◈ Once withdrawn, it can never be edited or submitted again.

Withdrawn vs. Deactivated

Withdrawn

❖ A withdrawn waiver can never be edited or submitted again.
❖ A waiver that has been submitted and then unsubmitted can be withdrawn.

Deactivate

❖ A deactivated waiver can be reactivated and edited again.
❖ A draft waiver is the only type of waiver that can be deactivated.
❖ Once a waiver has been submitted and then unsubmitted it cannot be deactivated.

CMS View Draft Feature

◈ This feature allows CMS to view a waiver that is being edited by the state, whether that be in draft, unsubmitted, RAI or IRAI status, with the concurrence of the state.

◈ If this button is not selected, then CMS cannot view the application.

◈ This feature is only available to state users.

CMS View Draft Feature (cont.)

◈ This feature hides the application from CMS so they are not able to view the waiver being edited.

◈ If this button is not selected, then CMS can see the application.

◈ This feature is only available to state users.

General WMS Functions

Waiver Active Functions

(Historical View)

Historical View

◈ **<u>Historical View</u>** is only available from Page One on an approved base waiver or base renewal.

Historical View (cont.)

◈ **Historical View** allows you to examine what the application looked like on a specific date or as it was originally approved.

Historical Date Selection

View As Of Date: (mm/dd/yy)

Go

View As Originally Approved:

Go

General WMS Functions

Saving, Printing, and PDFs

Save

◈ The system automatically saves your data when the page is refreshed.

◈ Refreshing the page includes:

- Navigating the system by selecting **←Back**, **Continue→**, or using the left-side navigation bar.

- Selecting **Logout** or **Home**

- Selecting **Save**

- Activating questions that are inactive. The system is dynamic, meaning the selection of some answers will activate more questions, changing them from grey to black.

◈ If you are logged into the system for 30 minutes or more without refreshing the page, you will be timed-out and automatically logged out. Automatic log out results in loss of data. Any previously saved data will not be lost.

◈ It is recommended that you manually save your work periodically to prevent loss of data.

Printing

- As of 12/3/18, the printed waiver PDFs and printed 372 Reports from the Waiver Management System (WMS) are now considered 508 compliant
  - *Note: As is standard with other accessibility checkers, users must perform a manual check on their document's logical reading order to ensure full 508 compliance.*
- **Recommended Action for All Users**
  - It is highly recommended that all users <u>clear their cache</u> before proceeding with the printing instructions.
  - If you have PDF reader software, you must complete the following steps to change your Form highlighting preference to ensure radio buttons and checkbox values appear correctly in printed outputs. The following screenshots reflect Adobe Acrobat as an example—your PDF reader preferences may not be on the same menu or may be titled differently.

PDF Reader Preferences

◈ Open the Preferences dialogue box (in Adobe choose **Edit**, **Preferences**).

◈ Change the highlighting option for your Forms preference (in Adobe select **Forms** in the Categories panel on the left and then select **Show border hover color for fields** under the Highlight Color preference).

Printing in WMS

- ◈ Follow the steps to generate a 508 compliant waiver or 372 Report with fully expanded text boxes. If you are unable to complete the instructions below, it may be because you do not have the correct software to read a PDF. If this is the case, please provide the waiver number(s) you are trying to print to the Help Desk.

- ◈ To print the waiver, select **Print** in the top menu bar within the waiver or on Page One.

- ◈ If you would like to print the entire waiver, select "Entire Application". To print a specific appendix, select the appendix.

- ◈ Then, select **Create Printable View**, which will open the waiver in a new tab.

Validate   Logout   Print

<-- Back

Printing Selection

To print a section or to print the entire application, make a selectio below and select **Create Printable View.** This action will open up another browser with a printable version of the waiver application. To print, select either the print icon in the toolbar or use the browsers print function. When you are finished close the printable version of the waiver application.

Select section to print:

- ◉ Main Module
- ○ Appendix A
- ○ Appendix B
- ○ Appendix C
- ○ Appendix D
- ○ Appendix E
- ○ Appendix F
- ○ Appendix G
- ○ Appendix H
- ○ Appendix I
- ○ Appendix J
- ○ Quality Improvement Strategy
- ○ Entire Application

Create Printable View

It may take a few moments to load the printable version. Please wait for the browser to finish loading before printing the contents.

Amendment Draft ID ZZ.001.01.12

Program Title:	This is a test waiver
Type of Request:	amendment - 5 year
Waiver Type:	Regular Waiver
Proposed Effective Date:	
Application Status:	DRAFT

Browse	Edit
Print	Validate
Change Report	Change Log

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Users with PDF Reader Software

◈ The 508 compliant PDF with all text fields expanded is automatically generated in the web browser, and you *must* **Save** that PDF after confirming the logical reading order.

◈ *Important*: You no longer need to use the **Print** function in your web browser to create a PDF once the waiver appears. Refer to the information below regarding saving the PDF:

   ◆ Move your <u>mouse</u> cursor over the document and a small <u>toolbar</u> should appear. The toolbar location can vary depending upon your browser but is often located at the upper-left or lower-right of the page.

   ◆ Once you've located the toolbar, select the icon that looks like a computer diskette or an arrow pointing down to save the PDF file.

Users with PDF Reader Software (cont.)

◈ Note: If the toolbar is not visible, look in your browser's File menu for the Save option. (Press the <u>Alt</u> key to make the menu bar visible if hidden.) You can also right-click on the document and select **<u>Save</u>** to save the PDF file.

Users without PDF Reader Software

◈ If you do not have PDF reader software and therefore have been reaching out to the Help Desk to generate waiver PDFs, please keep the following in mind:

   ◆ If you are using the Chrome or Firefox web browser when you print, the PDF generated in your web browser is considered 508 compliant, so you can **Save** that file after confirming the logical reading order.

◈ If you are using the Internet Explorer (IE) web browser, you will receive the following dialogue box. Make sure to choose **<u>Save</u>** (not Open). Due to IE limitations, only the saved file is considered 508 compliant—not the PDF that displays in the browser.

| Do you want to open or save ⬚⬚⬚⬚⬚⬚ from **wms-mmdl.cms.gov**? | Open | Save | ▼ | Cancel | ✕ |

◈ **Save** the PDF from this dialogue box and confirm the logical reading order. To ensure the output is formatted correctly you must always **Save** the PDF first versus **Print** it. Once the PDF is saved you can then open the file and print, if necessary.

General WMS Functions

Viewing Changes to the Waiver

Change Report

◈ To access the Change Report on Page One of the application, select **Change Report**.

Change Report (cont.)

Change Report for Waiver ZZ.0670.R00.00 - Apr 01, 2011

Report Header Data:

Waiver Number:	ZZ.0670.00.00
Draft Number:	ZZ.002.00.00
Application type:	new
Program title (as per last submitted version):	Demonstration Waiver Application-User Training
Proposed effective date (as per last submitted version):	Dec 16, 2014
Effective approved date:	N/A
Application Status:	UNSUBMITTED

Column Headers

Section/Appendix	Subsection #	Subsection Name	Question #	Question Name	Change Type	Changed By	Change Date
Changes in version submitted on Feb 18, 2011							
Main	8	Authorization		Authorizing Signature	MOD;	MEDSTAT	Feb 18, 2011
Appendix B	1	Target Groups	a	Target Group(s)	MOD;	MEDSTAT	Apr 19, 2011

Change Report (cont.)

◈ Change Report displays the latest changes made to an item in the application.

◈ It is organized by Appendices with the most recent group of changes (*based on latest version submitted)* displayed first and the remainder in descending chronological order.

◈ If a user's cursor touches a section, it may register as a change in the change report.

◈ Column Headers include:
  ◆ Section/Appendix Subsection#
  ◆ Subsection Name
  ◆ Question #
  ◆ Question Name
  ◆ Change Type (MOD, ADD, DEL)
  ◆ Changed By
  ◆ Change Date

Change Report (cont.)

❖ The change report displays changes that occurred between submissions.

❖ It does not show all changes.

❖ For example, if the waiver was submitted on 1/15, unsubmitted on 1/20 and resubmitted on 1/30, it will only show the changes that occurred between the unsubmission on 1/20 and resubmission on 1/30.

Change Log

◈ To access the Change Log on Page One of the application, select **Change Log**.

Change Log (cont.)

◈ The Change Log accepts a range of dates.

◈ Enter the desired date range, then select **Get Change Log**.

Note**:** If you select **Get Change Log** without entering a date range, the default display will include all change dates.

Change Log for Waiver

Date Range Selector:

Start Date: (MM/dd/yy)

End Date: (MM/dd/yy)

Get Change Log

Change Log (cont.)

◈ The Change Log shows all the changes made to the application within the selected date range.

◈ It is organized by the date in which changes were made to the application.

◈ It can be very lengthy if many changes were made.

WMS Administrative Functions

Roles

Function	State Auxiliary	State Staff	State Sys/Op Mgr	State Medicaid Director
Create waiver (new, amendment, renewal)	N/A	X	X	X
Browse	X	X	X	X
Edit	N/A	X	X	X
Deactivate	N/A	X	X	X
Activate	N/A	X	X	X
Submit	N/A	N/A	N/A	X
Unsubmit	N/A	N/A	N/A	X
Withdraw	N/A	N/A	N/A	X
Add users	N/A	N/A	X	X
User access	N/A	N/A	X	X
Allow CMS View/Hide from CMS	N/A	X	X	X

Adding New Users

◈ To add new users, first select **Maintenance**, then select **Edit Users**, and finally select **Create New User**. This will transfer you to the User Maintenance page. On the User Maintenance page, add the user's information.

◈ Create a username, add the user's email and phone number, select a role and the state.

◈ You must select **Save** prior to selecting the program access in the lower half of the page. Place a check next to the program(s) to which the user requested access. Select **Save** again.

◈ The State Sys/Op Manager and the State Medicaid Director are the only individuals who can add users for the state.

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Assigning User Access

◈ In order for a State Staff user to edit a waiver they have to be granted access to the waiver.

◈ To grant them access, select **User Access**, which will transfer you to the User Access page.

Assigning User Access (cont.)

◈ To grant a state staff access to the waiver, check their name off in the Access Column.

◈ Assigning access will allow users to edit the application.

◈ Caution: Do not select **Add All** unless you wish to add every user listed. This feature will grant all users listed access to edit the application.

Frequently Asked Questions

Amendments

Creating Amendments

◆ Question: I cannot create an amendment, the button is greyed out.

◆ Answer: You may have selected another amendment instead of the original base waiver or base renewal. It is only possible to create an amendment from the original base or a renewal (waiver number ending in .00) not another amendment. On Page One of an amendment, the **Create Amendment** button will be greyed out, while on a base waiver or base renewal it will be active.

Waiver Detail Finder

Waiver Family Number: **ZZ1022**
Waiver Family Title: **8-27-12**
Waiver Family Draft ID: **ZZ.06**
Waiver Detail:

Effective Date	Waiver #	Draft ID	M	Application title	Status
		ZZ.06.02.02		8-27-12	DRAFT
11/30/17	ZZ.1022.R02.01	ZZ.066.02.01		8-27-12	APPROVED
09/19/16	ZZ.1022.R02.00	ZZ.066.02.00		8-27-12	APPROVED
09/15/15	ZZ.1022.R01.01	ZZ.066.01.01		8-27-12	APPROVED
08/29/12	ZZ.1022.R01.00	ZZ.066.01.00		8-27-12	APPROVED
01/29/13	ZZ.1022.R00.01	ZZ.066.00.01		8-27-12	APPROVED
10/27/12	ZZ.1022.R00.00	ZZ.066.00.00		8-27-12	APPROVED

Show Inactive

Transferring Data from One Waiver to Another

◈ Question: I did not create the renewal or amendment off of the original waiver, is there any way to connect the two waivers?

◈ Answer: NO. The only way to transfer data from one waiver to another is by copying and pasting.

◈ Our Suggestion: If you are unsure or have some doubts about creating the renewal or amendment, please contact the Help Desk for assistance. It is more effort for you to reenter the data than to contact us.

Incorporating Amendments

- ◈ Question: How are amendments incorporated into the base waiver or base renewal?

- ◈ Answer: Once the amendment is approved and effective, it will be incorporated into the base waiver or base renewal. The incorporation of an amendment is determined by its effective date only, not the approval date.

Workflow of an Amendment

Frequent Issues

Response Length Errors

◈ If your response exceeds the character limit allowed for the text field, an error message will appear prohibiting you from navigating to another page. You cannot navigate until the character number is less than or equal to the character limit.

◈ An error message in red text will appear at the top of the page and above the problem text field. Fixing the character amount will allow you to leave the page.

◈ If a numeric response is incorrectly formatted, then a red error message will appear, preventing you from navigating. Changing the numeric format will correct the problem.

Session Timed Out Message

◈ A message alerts you when your session has timed out.

◈ This occurs when the page has not been refreshed for 30 minutes and may result in loss of unsaved data.

Compatibility View

Incorrect Screen

Correct Screen

Compatibility View (cont.)

- ❖ If you have a compatibility view issue, your screen will look like the "Incorrect Screen" (see prior page).

- ❖ Problems may arise, an error message may appear, when adding users when the screen is incorrect.

- ❖ To correct it, follow the instructions on the next couple of slides.

- ❖ If you would like these instructions in a Word document, please contact the Help Desk.

Compatibility View (cont.)

1. Select **Tools** on the top of the page.

2. Select **Compatibility View Settings**

(Internet Explorer 11 Browser)

Compatibility View (cont.)

3. The Compatibility View Settings box will pop-up. The website URL should appear in the Add this website textbox. To add the website, select **Add**.

Help

◈ If you have questions about the section you are completing, select **Help** on the top of the page.

◈ Selecting **Help** will transfer you to the corresponding section in the Help document.

Help (cont.)

◈ If you would like to go a specific section/appendix, select the link and you will be transferred to the selected section/appendix.

◈ If you need help with content and policy related issues, you can download and view the instructions, Technical Guide and Review Criteria in either a PDF format or in HTML.

Help (cont.)

◈ If the help instructions are not useful for a particular section, access the Instructions Technical Guide and Review Criteria.

◈ To return to the beginning of the Help section, select the **Top of Page**.

Training Information

◈ On the left-side of the Page there is a Links & Downloads section, where users can access the training guides and other materials.

Need Help?

◈ If you still have questions, please create a case and submit it to the Help Desk.

◈ To create a case, select **Contact** on any page within WMS, or call the Help Desk at (301) 547-4688.