



# Medicaid Enterprise Systems Community of Practice: Monthly Project Status Report Template



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**For Internal Use Only**

# Objectives

This session provides an overview of the Medicaid Enterprise Systems (MES) Project Status Report template. After this Community of Practice event, participants will:



Understand the purpose of the monthly Project Status Report and its regulatory drivers




Understand the data field requirements in the Project Status Report template



Be prepared to adopt the new PSR template for monthly reporting no later than July 01, 2026

# Evolution of MES Project Oversight



**2007-2022:** The Medicaid Enterprise Certification Toolkit (MECT) and Medicaid Eligibility and Enrollment Toolkit (MEET) each contained status-reporting expectations, but through **multiple oversight artifacts rather than one standardized project status report**. For example, Project Partnership Understandings (PPUs) and Quarterly Certification Progress Reports.

**2022-2025:** Since the release of Streamlined Modular Certification (SMC), CMS no longer requires states to submit the PPU or Independent Verification & Validation (IV&V) Quarterly Certification Progress Reports. Instead, **states are required to submit monthly project status reports** showing that the state's IT projects align with SMC and appropriately demonstrate project health.

**2026:** By July 1, 2026, states are required to use the [Project Status Report Template](#) published on Medicaid.gov for all MES projects receiving enhanced FFP. This **new template** was released as part of [State Health Official letter 25-003](#) and provides **consistent, structured data for reporting and enables timely decision-making and adjustments to project plans**.

# Project Status Report - Purpose & Policy References

## Purpose

- Provides CMS a clear, concise view of project status, including updates on milestones, risks, progress, and upcoming activities.
- Ensures consistent reporting of MES projects receiving federal financial participation (FFP), spanning design, development, and installation (DDI) and maintenance and operations (M&O) phases.
- Standardizes how states submit high-level MES project summaries, enabling CMS to monitor progress more efficiently and effectively.

## Policy References

- [42 CFR 433.112\(b\)\(15\)](#) : As a condition of enhanced federal matching for MES expenditures attributable to DDI, **states must produce data, reports, and performance information** that contribute to program evaluation and continuous improvement in business operations.
- [42 CFR 433.116](#) : For enhanced operations matching, the system must remain compliant with federal Medicaid requirements.

# SMC Guidance & the Project Status Report

*Per SMC Guidance, Version 2.0:*

- The monthly Project Status Report is a *Required Artifact* for Operational Readiness Review (ORR) and Certification Review (CR).
- Section 5, Development Phase: “The state must begin using the new Monthly Project Status Report Template available on the MES Certification Repository. **This template is required for submitting monthly project status reports** for certifications, ensuring that the state’s IT project aligns with SMC guidelines and accurately reflects project health.”
- Section 6.1.1, Operation Reporting Phase: “States must **submit monthly project status reports for each MES project** to demonstrate alignment with Conditions for Enhanced Funding, regulatory requirements, and overall project health.”

# What a Project Status Report Covers (1 of 2)



States must submit a monthly Project Status Report outlining activities **for all projects** receiving FFP within the Medicaid Enterprise, covering both DDI and M&O.

## What is a Project?

- **MES Project:** A defined set of information technology related tasks, undertaken by the State to improve the efficiency, economy and effectiveness of administration and/or operation of one or more of its human services programs
- **Operational Projects:** Projects in the M&O phase that support the ongoing operation, maintenance, or enhancement of an approved MES system or module.

# What a Project Status Report Covers (2 of 2)

A single status report may reference multiple MES modules and projects due to the many-to-many relationships that exist between MES Systems, Projects, and APDs.

**States submit one PSR that reports on all active MES projects receiving FFP.**

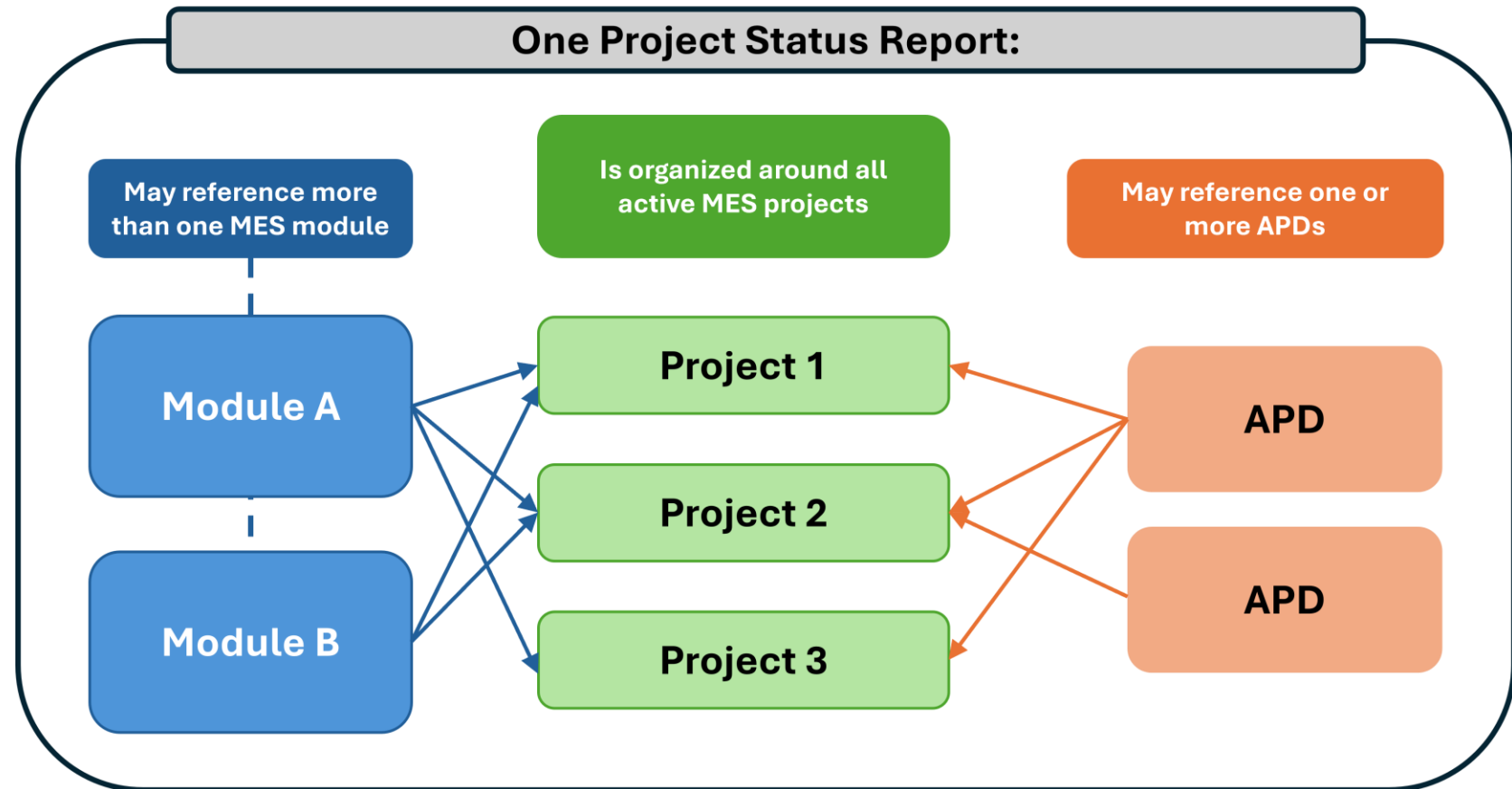


Figure 1. The Relationship Between MES Systems, Projects, and APDs

# Structure of the New Project Status Report Template

## Template at a glance:

### **1. Instructions Tab:**

Provides guidance on how to complete the Project Status Report

### **2. State Profile Tab:**

Collects an overview of the state Medicaid agency and its MES environment

### **3. State Contracts Roster**

**Tab:** Collects an inventory of all active MES contracts supporting the agency

### **4. Project Overview – DDI**

**Tab:** Collects key DDI project information. States must recreate this tab for each project receiving FFP in DDI

### **5. Project Overview – M&O**

**Tab:** Collects key M&O project information. States must recreate this tab for each project receiving FFP in M&O

# Recent Enhancements to the Template

## Clarified Guidance

- States should provide the original approved budget from the last APD (covering the entire project lifecycle), total expenditures to date, remaining budget, and the percentage of budget still available
- States should refer to the Green/Yellow/Red definitions in the instructions for the Major Deliverables/Milestones table
- Submit the Project Status Report through Email + the CMS-designated repository

## Additional Data Collection

- Contact and other information on E&E Systems Profile and Encounter Processing
- T-MSIS intersection field

## Separated DDI and M&O Project Reporting

- M&O-specific project overview tab

# State's Role and Responsibilities

When completing the monthly Project Status Report, state Medicaid agencies should ...

- **Create a “Project Overview” tab for each project receiving FFP**, even if the MES project does not require certification.
- **Document changes since the last reporting period and update information as needed.**
  - Note: The State Profile and State Contracts Roster tabs should be updated as needed. These are primarily one-time-effort tabs and can be carried over each month.
- **Follow the structured template, with flexibility based on the nuances of the project(s).** If the state has questions or concerns on how to use the template or report specific content, it should work with its designated MES State Officer to determine the most appropriate approach.

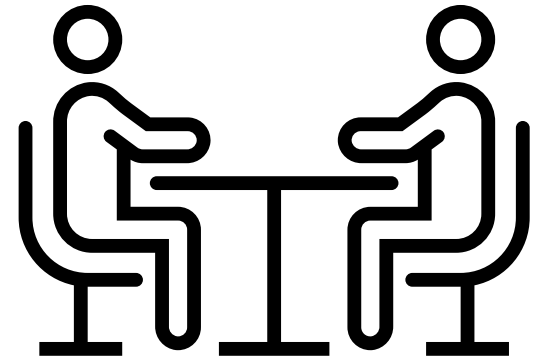
*Starting July 1, 2026, states must submit Project Status Reports monthly via email and to the CMS-designated repository in Box under the “[State Name] – Project Status Reports (PSR)” folder.*

# PSR Template Walkthrough & State Demo

# CMS Review and Oversight of Project Status Reports

Upon receiving a Project Status Report, CMS will:

- Review the report for completeness and accuracy
- Compare the report to prior submissions and approved APDs to ensure alignment and to identify trends in key areas (cost, schedule, overall performance)
- Validate the state-reported project health status and follow up with the state if clarification or corrective action is needed
- Collaborate with the state to develop mitigation plans, as appropriate, for projects in poor health



# Resources

## Contact Information

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## Important Links

[GitHub | CMS MES Certification Repository](#)

[MES Templates](#)

[Medicaid Enterprise Systems Hub](#)

**Questions?**

# Project Status Report

## FAQs

# FAQs (1 of 7)

## **Is this requirement to submit a Project Status Report new?**

No. the reporting requirement is not new, but this template is. Since SMC launched in 2022, CMS no longer requires states to submit the Project Partnership Understanding or Quarterly Certification Progress Reports. Instead, states now submit monthly project status reports.

This new standardized template provides:

- A consistent reporting structure across all states.
- Structured data collection that makes analysis and comparison easier.
- Better visibility into project health.
- Timely information to support decision-making and adjustments to project plans as needed.

Contact your MES SO for access to the project status reports folder.

# FAQs (2 of 7)

**Is anything else required by the state to comply with the project status reporting requirements? In the SMC Guidance (version 1), page 11 lists several bulleted items, such as Roadmap, Progress Tracking, User Feedback, Defect and Risk List, Product Demos, and Testing Process.**

No. All pertinent MES project status reporting elements are captured in the new monthly Project Status Report template. This includes any applicable content referenced in the guidance document. The SMC Guidance was updated to Version 2.0 after the State Health Official letter was released to better reflect the reporting elements in the new template.

**Are project status reports required for MES projects that do not require certification?**

Yes. States must submit a status report for each MES project receiving enhanced funding. An MES project can include, but not be limited to, an initiative to develop or enhance a system or module, Project Management Office, call center, or other M&O for a system or module (MES modules pertain to specific functional areas within the Medicaid Enterprise).

# FAQs (3 of 7)

## **Does the project status report require reporting on M&O?**

Yes. There is a “Project <Name> Overview – DDI” and “Project <Name> Overview – M&O” tab in the template. Use the appropriate tab and fill in all the applicable information.

## **If the project’s system/module is not creating the Transformed Medicaid Statistical Information System (T-MSIS) files, should I mark the “T-MSIS Intersection” field as “N”?**

Mark “Y” if the project contributes to T-MSIS in any way, including:

- Providing data that feeds into T-MSIS files, even if another system creates the files, or
- Directly creating/generating the T-MSIS files.

Mark “N” only if the project neither provides any data on the T-MSIS files nor generates T-MSIS files.

# FAQs (4 of 7)

## **Which parts of the template need to be filled out for M&O vs. DDI?**

Fill out all applicable fields in the template that match your project phase. Use the “Project <Name> Overview – DDI” tab for design, development, and implementation projects. Use the “Project <Name> Overview – M&O” tab for maintenance and operations projects.

## **Should milestones be reported on for the whole project or monthly installments?**

Report milestones for the current reporting month only. Include major upcoming milestones for future months so CMS can see what is planned. Optionally, states may enter all project milestones at once.

## **What is the purpose of collecting vendor contact information in the templates?**

Vendor contact information helps CMS understand which vendors support each MES system or module and identify appropriate points of contact if questions or issues arise. This information supports coordination, communication, and accountability across MES operations.

## **If I know the State point of contact (POC) is changing soon, when should I include that change?**

You should enter the change as soon as you know it. Show both the current and future POC and include the effective date when the new POC will take effect.

# FAQs (5 of 7)

## **How can states submit additional supporting information if not captured in the project status report?**

States can submit additional supporting information outside the project status report as a supplemental file. The project status report should only contain information related to the data elements included in the report.

## **Can states leave sections blank if nothing has happened in the past month or is not relevant?**

No. States should designate the appropriate fields as “no update” if there is no new information to report or “not applicable” if it does not apply.

## **Once an MES system, module, or project goes through certification, must states continue submitting project status reports to CMS?**

Yes. Even after a state completes certification, they should continue to submit a monthly project status report to support operational risk management, in addition to meeting their operational reporting requirements using the ORW. Submitting project status reports also applies to all projects receiving enhanced funding, including those in the M&O phase.

# FAQs (6 of 7)

**Some states do not do budget costs by month, making it difficult to report on them in the project status report. How should states in this situation approach that section?**

Use the most recent expenditure data available in the "Actual Expenditures Costs for This Period-to-Date" field. Since budget information may lag, CMS does not expect real-time data.

States must still provide a clear and comprehensive summary of each MES project's financial status, even if the figures are not from the current reporting month.

**How is a "major deliverable" defined for the project status report?**

A "major deliverable" is defined by each state, based on its own project management practices and documentation.

# FAQs (7 of 7)

**APDs include a roll-up of several projects. Should the project status report be broken out for individual projects? For example, should states submit a project status report just for provider enrollment even if the approved APD budget is bigger?**

Yes. States should submit a status report outlining activities for each project receiving federal financial participation within the Medicaid Enterprise covering both design, development, and implementation and maintenance and operations phases. A single MES system or module may be associated with multiple projects, and multiple MES modules could be associated with one project. The “State Profile” and “State Contracts Roster” tabs provide information on all MES-related projects.

**What criteria determine the MES Project Health Rating?**

MES Project Health Ratings are categorized as Red, Yellow, or Green based on the project's budget, schedule, resources, issues and risks, scope, and quality standards.

- Red: Indicates the project is off track and requires immediate action due to budget overruns, missed milestones, lack of resources, or unresolved issues and risks.
- Yellow: Signifies potential issues that could lead to delays or increased costs if not addressed promptly, such as manageable budget issues, minor scope changes, or resource constraints.
- Green: Means the project is on track, progressing as planned, and meeting objectives within the defined scope, time, and cost.

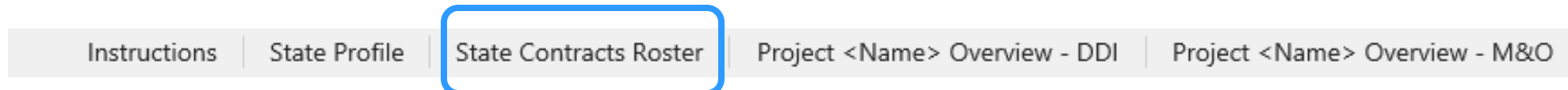
# Appendix A: Project Status Report Deep Dive

# “State Profile” Tab

- The “State Profile” tab provides an overview of the State Medicaid Agency and its Medicaid Enterprise Systems, including background information and primary goals.
- This Tab will inform CMS of the essential components and objectives of the State Medicaid program.
- The State Profile tab includes the following sections:
  - State Medicaid Agency Profile
  - Medicaid Enterprise Systems landscape: Whether the state has (and who supports) major MES components and related vendors/POCs, including:
    - The Program Management Office (PMO)
    - Key Vendors – State should use their best judgment to identify what vendors are “key”.
    - Other Key Vendors – Other entities that provide services or supports to the state’s MES. States should list “N/A” if not relevant.

# “State Contracts Roster” Tab

- In the State Contract Roster tab, states should capture all active MES contracts supporting the State Medicaid Agency.
- Intended to give CMS visibility into the active contract vehicles and vendor relationships that support MES work for the State Medicaid Agency



# “Project <Name> Overview” Tabs

The DDI and M&O Project Overview tabs include the following sections:

- Project Status Overview/Project Information
- Executive Summary
- Recent Accomplishments
- Activities Planned for Next Period
- Testing Status (\*Only for DDI Projects)
- Security Updates
- Budget
- Roadblocks: Issues/Defects
- Major Deliverables and Milestones

Instructions

State Profile

State Contracts Roster

Project <Name> Overview - DDI

Project <Name> Overview - M&O

# “Project Overview” Tab: Project Information

Project Status Overview
<b>Project Information</b>
Project Name
System Name
System/Module Type
Module Type(s) if “Other” or “Multi-Module” was selected
T-MSIS Intersection (Y/N)
Vendor
Subcontractors (if applicable)
Reporting Period
Project Health
Project Percent Complete
System Go-Live Date
DDI Contract End Date
Primary State POC
Project Phase

- **For the “T-MSIS Intersection” field**, input “Y” if the project contributes to T-MSIS in any way (for example, by providing data for or generating T-MSIS files). Input “N” if the project does not provide data to or generate T-MSIS files
- **For the “Subcontractors” field**, list major subcontractors to the prime vendor or vendors responsible for entire modules within the broader MES system
- **The “System Go-Live Date”** should be pulled from the project roadmap whenever possible, but an estimated date may be used when necessary
  - M&O Projects do not require input of the “Project Percent Complete” and “System Go-Live Date” fields
- Contact your MES State Officer if you have questions about this section or other sections of the Project Status Report

# “Project Overview” Tab: Project Information, Cont’d

Project Status Overview	
Project Information	
	Project Name
	System Name
	System/Module Type
	Module Type(s) if “Other” or “Multi-Module” was selected
	T-MSIS Intersection (Y/N)
	Vendor
	Subcontractors (if applicable)
	Reporting Period
	Project Health
	Project Percent Complete
	System Go-Live Date
	DDI Contract End Date
	Primary State POC
	Project Phase

**Project Health/Status Ratings** are categorized as Red, Yellow, or Green based on the project's budget, schedule, resources, issues and risks, scope, and quality standards.

**Red:** Significant problems are impacting the project, such as major delays, substantial budget overruns, or critical scope changes. The project is at risk of not meeting its objectives unless corrective actions are taken immediately.

**Yellow:** Potential issues or risks could affect the project's success. These might include minor delays, budget overruns, or emerging scope changes. Although the project is still manageable, it requires attention to prevent escalation.

**Green:** Tasks or milestones are progressing as planned. No issues or risks could impact the project's timeline, budget, or scope.

*Note: The above definitions are listed on the Instructions tab in the template*

# Project Overview” Tab : Executive Summary

## Executive Summary

Provide the executive summary from the applicable APD.

- The **Executive Summary** section should provide CMS a bottom, line up front summary.
- States may include any additional context it wants CMS to be aware of during its review of the Project Status Report

# Project Overview” Tab : Recent Accomplishments

## Recent Accomplishments

Key highlights and accomplishments from the past reporting period, such as successful go-live of new system, new functionality release, CMS certifications, or major milestones.

- The **Recent Accomplishments** section should include only the accomplishments since the last report.
- The state may input "No Updates" if there were no accomplishments during the past month, which is ok.

# Project Overview” Tab : Activities Planned for Next Period

## Activities Planned for Next Period

List key highlights of work planned for the next reporting period.

Example: Complete User Acceptance Testing (UAT) Tester Training by 11/10/2025.

- The **Activities Planned for Next Period** section helps CMS understand what the state will be focused on in the next reporting period.
- Since status reports cover the prior month and are submitted after the month ends, the “next reporting period” refers to the current month.

# Project Overview” Tab : Testing Status

## Testing Status

Provide an overview of the state testing status.

Overview should include security and vulnerability testing. Updates should include any changes to the state’s test plan.

- The **Testing Status** section helps CMS understand whether the state’s testing is comprehensive. It should not change often.
- If the state is completing all the testing as planned, this will also tie in with the milestone/ deliverable section.
- This section is NOT a requirement for M&O projects. If states do want to report testing status for projects in M&O, they may do so under “Recent Accomplishments”, “Security Updates” or “Milestones”, as appropriate.

# Project Overview” Tab : Security Updates

## Security Updates

Provide a summary of all security-related incidents during this reporting period, such as breaches, critical findings in vulnerability scans, etc.

- The **Security Updates** section should help CMS understand overall security posture, including active vulnerabilities and emerging risks.
- States should only report negative security events in the “Security Updates” field. Positive security outcomes such as clean assessments, successful audits, or risk-mitigation achievements may be reported in the “Milestones” section.
- If there are no Security Updates to share, the state may input "No Updates"

# Project Overview” Tab : Budget

## Budget

Complete the following table to include the project/M&O budget information.

In the table, the state should provide updates to (1) **the total approved project/M&O funding** for each MES project (from inception to completion) and (2) **the actual costs** (data may be quarterly, depending on the project). Refer to the instructions tab for more budget definitions.

- This section should help CMS understand if the project is over/under the approved funding for each project.
- Required data fields:
  - **Original Budget from the Last Approved APD:** Enter the total funding amount approved (federal and state share) in the most recent APD for the project, covering the entire project lifecycle.
  - **Actual Expenditures Costs for this Period-to-Date:** The cumulative amount of money actually spent on the project up to and including the current reporting period.
  - **Remaining Project Budget:** The portion of the original approved budget that has not yet been spent, calculated by subtracting the actual expenditures to date from the original budget.
  - **Percent Project Budget Remaining:** The percentage of the original approved budget that remains unspent, calculated by dividing the remaining project budget by the original budget and multiplying by 100.

# Project Overview” Tab : Roadblocks

## Roadblocks: Issues/Defects

Complete the following table by identifying the top three high-priority roadblocks for the current reporting period. In the first column, indicate whether each entry is an issue or a defect. Focus only on the highest-priority items that are impacting scope, schedule, or budget—do not include a running list of all issues and defects. Only include items that are currently open or active.

- The **Roadblocks** section is a critical section for CMS to understand overall project health.
- States should only include an activity in the “Roadblocks” section if delays or issues arise
- States should only list the top three high-priority roadblocks.

# Project Overview” Tab : Monthly Major Deliverables and Milestones

## Major Deliverables & Milestones

Complete the Milestone table with the status of **major deliverables and milestones** each month. Example Milestones are included to highlight the milestones that might typically be included and should be deleted before submission. Include the state's milestones in the table after the example.

Provide any changes or additional context for the milestones in the “Changes/Impact During Reporting Month” column.

For the “Milestone Status” field, refer to the Green/Yellow/Red definitions on the instructions tab.

- The **Major Deliverables and Milestones** section covers the reporting month, not the entire project
- Only major deliverables/ milestones should be captured
- Major milestones should align with the APD. If a milestone no longer aligns with the project plan/scope, the milestone should be included in the Project Status Report with a “Red” status
- The first “Milestones” table in the template is an example. States should use the second table to complete their updates