



# FORUM ONE

*Extend Your Influence*



## WordPress Training Guide

**The Medicaid and CHIP Payment and Access Commission**

January 7, 2015 (*Updated March 5, 2015*)

# Table of Contents

---

[About](#)

[Overview](#)

[WordPress Dashboard](#)

[Custom Posts and Pages](#)

[Media](#)

[Users roles](#)

[Managing Content](#)

[Post Types](#)

[Pages](#)

[Custom Excerpts](#)

[WYSIWYG Editor](#)

[Styling Headers and Extra Styling Options](#)

[Adding Data Tables via the WYSIWYG Editor](#)

[Quick Table Tips](#)

[Custom Fields](#)

[Publications](#)

[People/Commissioners](#)

[Public Meetings](#)

[News](#)

[Date picker: Publish date](#)

[Example: Date published on the website \(displayed to site users in the format of Month Day, Year, i.e. December 13, 2014\)](#)

[Subtopics](#)

[Adding Pages to Menus](#)

[Managing Users](#)

[Managing Widgets](#)

[Managing Taxonomies](#)

[Managing Topics](#)

[Topic Pages](#)

[Topic Order](#)

[Subtopics](#)

[Managing Tags](#)

[Editing Homepage Content](#)

[Editing Lead In Text](#)

[Editing Featured Publications and News](#)

[Commissioners-only Content](#)

[Protecting HTML Content](#)  
[Protecting Files](#)  
[Log in Message](#)  
[Updating the Statute and Regulations Guide](#)  
[CSV File](#)  
[Exporting a CSV from Excel](#)  
[Exporting a CSV from Google Documents](#)  
[CSV Formatting Tips](#)  
[Uploading the CSV](#)  
[Embedding the Guide with a Shortcode](#)  
[Contact Form](#)  
[Search Settings](#)  
[Plugins](#)  
[Site Map](#)  
[Main Content Navigation](#)  
[Enterprise Navigation](#)  
[Footer](#)  
[Technical Notes on Caching](#)

## About

This is a living reference document for administrators of the Medicaid and CHIP Payment and Access Commission Wordpress website, built by Forum One ([www.forumone.com](http://www.forumone.com)) in 2015.

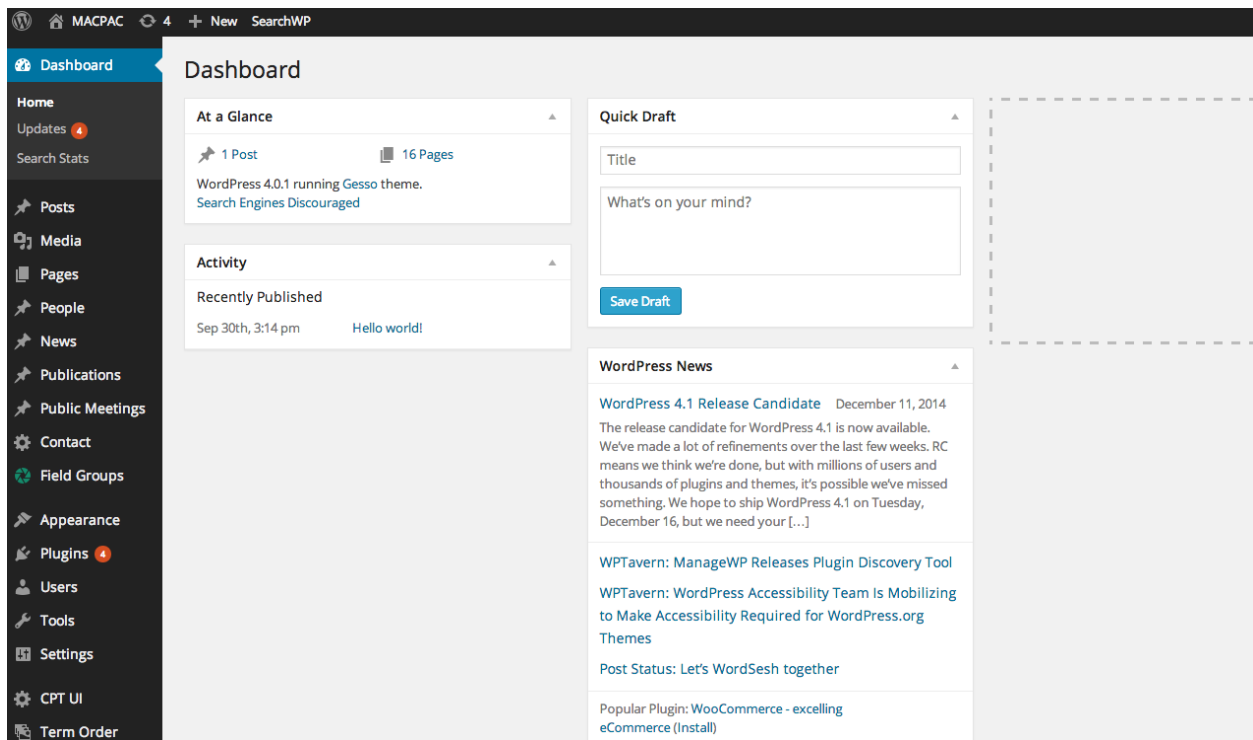
This document will be maintained and updated by MACPAC post-launch.

## Overview

### WordPress Dashboard

When logged into the WordPress Administrative interface, most (if not all) functions can be completed from the Dashboard. The left menu is the beginning point for most management and administrative functions including creating new content (posts and pages), editing existing content, and managing users. Log into the admin site here (pre-launch): <http://stage.macpac.forumone.com/admin>

#### The WordPress Dashboard



## Custom Posts and Pages

WordPress allows for the creation of custom post types to meet editorial requirements. Post types are built using specific fields (attributes). For example, a publication content type would need a title, publication type, publish date, abstract, file attachment(s), etc. Each post type will have a unique configuration of these attributes, which should each serve a different editorial purpose on the website. Post types also dynamically filter through to different sections of the website. This guide identifies each post type, their attributes, and where the content exists on the website. Below is a quick listing of those content types.

### Your Custom Post Types

- Publications
- News
- People (a.k.a. Commissioners)
- Public Meetings
- Subtopics

The MACPAC site also uses the default “page” content type, but it is not configured to include additional custom fields.

(Note: We are currently not using the WordPress default “Post.” This can be used in the future if blogging becomes a need.)

### Your Custom Pages

Custom pages are standard WordPress pages (content type “page”) that have been further customized to display unique content in addition to the standard title and body content.

- Public Meetings (/events)
- MACStats (/macstats)
- Topics (/topics)
- Homepage

In each of these cases, there is a page within the WordPress interface where an administrator can edit the page title and some content. The rest of the pages’ contents, however, are controlled by PHP code within the page template files. You can find the PHP code in question in the theme directory (/wp-content/themes/gesso-theme-wordpress). The files are labeled page-X.php where X is the URL of the page in question (page-events.php, for example).

### **Custom Archive Pages**

The MACPAC site uses several customized “archive” pages to list content of the same type for users to browser in “teaser” view. Those pages include:

- News (/news)
- Commissioners (/people)
- Past Public Meetings (/public\_meeting)
- Publications (/publication)

The content of these pages is derived from PHP code within the theme files. The purpose of this PHP code is to determine the logic in which the teasers are presented (sort order, what fields are present, etc). To view the code for each page, review the archive-X.php files within the theme directory, replacing X with the page URL (archive-publication.php, for example).

Note: Archive pages cannot be edited via the WordPress interface.

### **Pagination Settings for Listing Pages**

On pages where content is listed in teaser view, the site is configured to show pagination links in groups of 10. To the group size, hover over “Settings” in the Dashboard menu and click “Reading.” Update the integer in the “Blog posts to show at most” field to the desired group size.

## **Media**

Media consists of the images and documents that you upload and use in your site. Media is typically uploaded and inserted into the content when creating new content. All Media can be found and managed through the Media Library. All media added during the creation of a page is automatically added to the media library. You can access the Media Library by going to “Media” from the WordPress dashboard.

## **Users roles**

The website Administrator is responsible for adding new users or changing user roles on the site.

- Administrator – somebody who has access to all the administration features within a single site.
- Editor – somebody who can publish and manage content including the content of other users.
- Author – somebody who can publish and manage their own content.
- Contributor – somebody who can write and manage their own content but cannot publish them.
- Subscriber – somebody who can only manage their profile and view protected content.

Note: Commissioners have the role “subscriber” while MACPAC staff with WordPress accounts have the role “administrator.”

We recommend that someone who forgets their password click the “Forgot Password” link on the login page. However, if necessary, the Administrator can reset passwords.

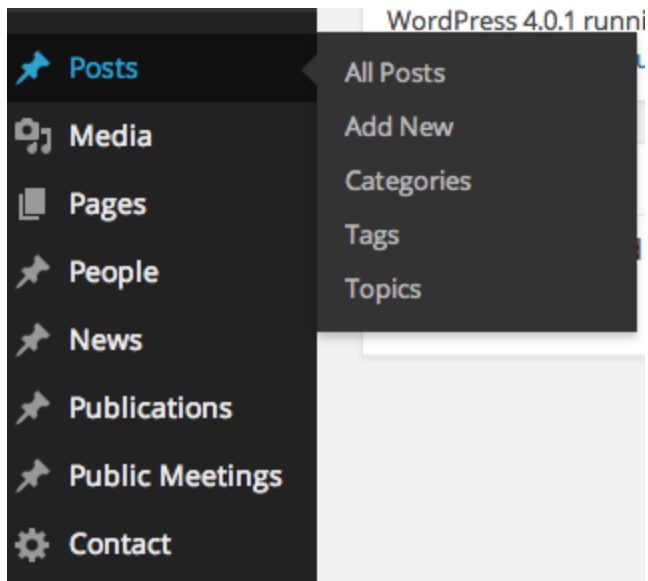
# Managing Content

## Post Types

Each custom post type has its own section within the WP Admin. Hovering over a post type button gives you a quick menu to view all of the posts of that type, or create a new post of that type. Clicking on the button directly navigates you to the list of posts of that type.

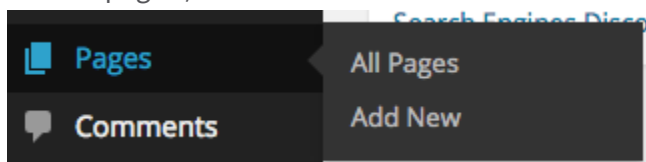
There are two quick ways to create a new post.

1. Hover over the desired post type, and choose “Add [Post Type]”
2. Hover over the “+ New” menu item at the top of your screen (when logged in) and choose the desired post type.



## Pages

Managing pages is similar to managing posts, except that all Pages are listed in one section (including custom pages.)



There are two quick ways to create a new page.

1. Hover over “Pages” in the left menu and choose “Add New”
2. Hover over the “New” menu item at the top of your screen (when logged in) and choose “Page.”

## Custom Excerpts

By default, WordPress makes its best effort to generate an excerpt of all content for display in “teaser” mode, such as in search results or on some templates (topic pages, for example). The CMS does this by taking the first 75-100 characters, searching for a word break, then inserting ‘[...]’ if there is additional text after that word break.


Administrators can control excerpts by entering text in the “excerpt” field on all post editing interfaces. In this case, WordPress will use this text (untruncated) instead of generating its own.

**First name**  
Used for alphabetical sorting

Sharon

**Job title**


**Term (end)**


2016-12-31 


**City, State**

South Charleston, WV

**Position**

Commissioner 

**Excerpt** 

Custom excerpt goes here! 

Excerpts are optional hand-crafted summaries of your content that can be used in your theme. [Learn more about manual excerpts.](#)

## WYSIWYG Editor

The What You See Is What You Get (WYSIWYG) editor allows you to easily add formatted content and preview exactly how that content will be displayed on the published page. **Do not cut and paste text from a webpage, Word document, or other formatted file, as the hidden markup code will cause problems with display on the page. Either use the “paste as plain text” button on the WYSIWYG menu, or place the content in Notepad or Wordpad first, and then cut and paste from there.**

### Styling Headers and Extra Styling Options

The WYSIWYG editor includes options to allow administrators to apply styling to certain pieces of text similar to adding headings in Microsoft Word. By applying these headings, the text (when published and viewed from the “public-facing” site) will inherit the font colors and margins from the WordPress theme to differentiate them from the body text.

To apply headings, click the “Toggle Toolbar” button on the far right of the WYSIWYG editor. Then, highlight the text you wish to style. Use the form select on the far left of the second row of toolbar buttons to choose your desired styling (heading 2, heading 3, etc).



Edit News
Add News

# Medicaid and CHIP Payment and Access Commission (MACPA

Permalink: <http://localhost:8080/news/medicaid-and-c...re-in-medicaid/> Edit View News Get Shortlink

Add Media Insert Download

Visual Text

**B** *I* ABE

Heading 2

Paragraph  
Pre  
**Heading 1**  
**Heading 2**  
**Heading 3**  
**Heading 4**  
**Heading 5**  
**Heading 6**

11 Report to the Congress is comprised of two major sections. what is known about the use of managed care in Medicaid tion on the populations enrolled; Medicaid managed care plan licy; access and quality; and program accountability, integrity, on, MACStats—the Medicaid and CHIP program statistics ded portion of the Report—features national and state-level enrollees, spending, and the use of managed care.

Word count: 83 Draft saved at 10:26:46 pm. Last edited on December 23, 2014 at 4:43 pm

## Adding Data Tables via the WYSIWYG Editor

The WYSIWYG editor contains a button that helps content creators insert tabular data into content. This button inserts the necessary HTML markup for content creators so that it does not have to be done manually in “text” mode. However, it is important to take a few extra steps to make sure the HTML markup the button generates meets Section 508 accessibility standards. For example, accessibility guidelines call for the first row of an HTML table to contain headings.

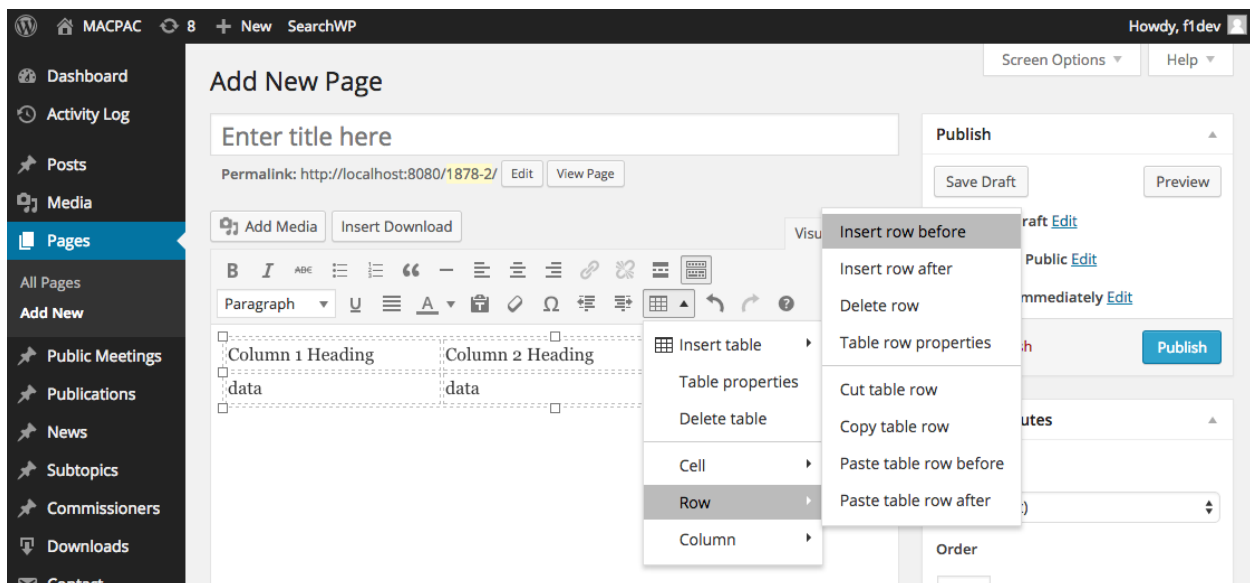
To insert a table, do the following:

1. Click the “Toggle Toolbar” button on the far right of the WYSIWYG editor. This will expose a second line of WYSIWYG buttons.
2. Click on the “table” button (fourth button from the right on the lower row of buttons).
3. Hover your mouse over “Insert Table” and select the number of columns and rows you’d like your table to contain (these can be adjusted later).
4. The editor will insert a collapsed table outline into the body field. Click on the Table button and select “Table Properties.” In the width field, enter “100%” to make the table span the entire width of the body field. Click “OK.”

5. Put column heading text in the first row of your table. After you have entered the text, highlight the row and click on the Table button again in the WYSIWYG editor. Hover over the option for “Row” and then select “Table row properties.” Change the “Row type” select to “Header” and click “OK.”
6. Insert the rest of your data into the remaining cells.

### Quick Table Tips

- *Add a column:* Put your cursor in a cell located near where you want a new column. Click the Table button, and select “Column.” Then choose either the “Insert column before” or “Insert column after” option.
- *Add a row:* To add a row to the bottom of the table, put your cursor in the bottom right cell and hit the tab key. If you need to insert a row above an existing row, put your cursor in a cell located near where you want a new row. Click the Table button, and select “Row.” Then choose either “Insert row above” or “Insert row below.”
- *Delete a row or column:* Put your cursor in a cell of the row or column you want to delete. Click the Table button, and select either “Column” or “Row.” Then, select the “Delete” option.



**Note:** Per Section 508 accessibility guidelines, tables should only be used for tabular data -- not for layout purposes. For that reason, please do not apply styles to individual cells, rows or columns in an attempt to create a layout. Tables should instead inherit the basic styling provided by the templates.

## Custom Fields

For custom post types, there will be additional fields in which to add content. These vary depending on their intended use. Custom Fields are shown below the Wysiwyg editor of the content's edit form.

## Publications

You will want to select the fields below in order to relate the publications to other items on the appropriate pages.

You should also put a check next to one or more “Topics” the publication is about and use the autocomplete field to add tags, if desired.

The screenshot displays the WordPress 'Add New' form for a publication. At the top, there is a text area with the letter 'p' and a 'Word count: 0' indicator. Below this is the 'Publication fields' section, which includes a 'Publication type' dropdown menu currently set to 'Reports to Congress', a 'Published date' field with a calendar icon, a 'Parent report' search box, and a list of parent reports: 'Another test MACStats page', 'Sample report', 'Sample report chapter', 'Test Databook', 'Test MACStats pub', and 'Test Publication'. At the bottom of the main form are sections for 'XLS File' and 'PDF File', each with an 'Add File' button. To the right, the 'Topics' sidebar shows a list of topics with checkboxes: 'People', 'Benefits', 'Financing', 'Payment and Delivery Systems', 'Spending', 'Access and Quality', 'Program Administration', and 'Medicaid and Other Payers'. Below the topics is a '+ Add New Topic' link. The 'Featured Image' sidebar at the bottom right contains a 'Set featured image' link.

The fields that are utilized for publications on your site include:

Dropdown: Publication type

- Examples: Reports to Congress, Commission Meeting Transcripts

Date: Date picker

- Example: Date published on the website (displayed to site users in the format of Month Year, i.e. December 2014)

Parent report: Relationship

- Example: The overall report in which a chapter belongs.

XLS File Upload: File upload field

- Example: Excel file attachment in Publication post type

PDF File Upload: File upload field

- Example: PDF file attachment in Publication post type

## People/Commissioners

Individual commissioners should be added as a new page under People.

**People fields**

**Last name**  
Used for alphabetical sorting

**First name**  
Used for alphabetical sorting

**Job title**

**Term (start)**

**Term (end)**

**City, State**

**Position**

Commissioner

Last name: Single line text

- Example: Schwartz

First name: Single line text

- Example: Anne

Job Title: Single line text

- Example: Executive Director

Term (end): Date picker

- Example: 12/31/14

City, State: Single line text

- Example: Washington DC

Dropdown: Position

- Examples: Commissioner, Chair, Vice-Chair, Staff

Note: This content type was created with the idea that MACPAC staff members may eventually have their own pages on the site. At launch, however, WordPress has not been themed or configured to support that. Staff names should be added/edited on a custom page instead.

## **Public Meetings**

Public Meeting fields

Start date

End date

Location

Contact

Add Media

Insert Download

B I ABC [bulleted list] [numbered list] “ — [list with icon] [list with icon] [list with icon] [link] [unlink] [table] [table border] [expand]

p

Agenda

Add File

Transcript

Add File

The fields that are utilized for public meetings on your site include:

Start Date: Date picker

- Example: Date meeting starts

End Date: Date picker

- Example: Date meeting ends

Location: Single text field

- Example: Washington DC

Contact: WYSIWYG editor

- Example: Name and email address of a MACPAC staff person in charge of coordinating the meeting.

### Agenda File Upload: File upload field

- Example: PDF, Excel, or Word file attachment

## Transcript File Upload: File upload field

- Example: PDF, Excel, or Word file attachment

Note that posting presentations requires administrators to create new “publication” posts for each presentation, selecting the public meeting in the “parent report” field. This will cause the presentations to automatically appear at the bottom of that public meeting’s page. To sort presentations in a custom order, use the “Order” field in the right sidebar block titled “Attributes” in the editing interface when creating presentation publications.

The screenshot shows the WordPress editing interface for a publication. On the left, the 'Publication fields' sidebar contains a 'Publication type' dropdown set to 'Presentations', a 'Published date' field with a calendar icon, and a 'Parent report' field with a search bar containing 'meeting'. Below the search bar is a list of public meetings: April 2011 MACPAC Public Meeting, April 2012 MACPAC Public Meeting, April 2013 MACPAC Public Meeting, December 2010 MACPAC Public Meeting, and December 2013 MACPAC. The 'April 2014 MACPAC Public Meeting' is selected and shown in a larger preview window. At the bottom left, there is an 'XLS File' upload field. On the right, the 'Attributes' sidebar includes a list of topics with checkboxes: Benefits, Financing, Payment and Delivery Systems, Spending, Access and Quality, Program Administration, and Medicaid and Other Payers. Below this is a '+ Add New Topic' link. The 'Attributes' section also has an 'Order' field with the value '0'. At the bottom right, the 'Featured Image' section has a 'Set featured image' link.

## News

New press releases or other news items should be added as “New News.”

The screenshot shows the 'News fields' section of a WordPress post editor. It includes a 'Publish date' field with a calendar icon, a 'Source' section with 'URL' and 'Link Text' input fields, a 'News Type' dropdown menu set to 'News', a 'News file' section with an 'Add File' button, and an 'Excerpt' section with a text area. Below the text area is a note: 'Excerpts are optional hand-crafted summaries of your content that can be used in your theme. [Learn more about manual excerpts.](#)'

Date picker: Publish date

- Example: Date published on the website (displayed to site users in the format of Month Day, Year, i.e. December 13, 2014)

URL source code: If the news item comes from a website other than MACPAC

- Paste the URL link.

Text: Name of Source

- Use only if inserting a link in the URL.

Dropdown: News type

- Examples: Press Release, New publication

News File Upload: File upload field

- Example: PDF or Word file attachment (e.g. Press Release template)

Text: Excerpt

- Short text (1-3 sentences) that will display on the main News page

## Subtopics

There are no custom fields defined for the subtopic post type.

## Adding Pages to Menus

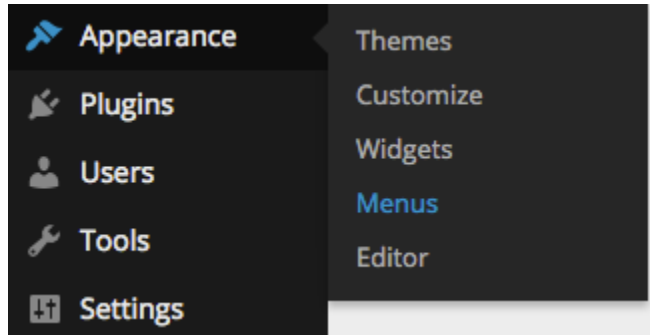
Menus are used on your site for the following:



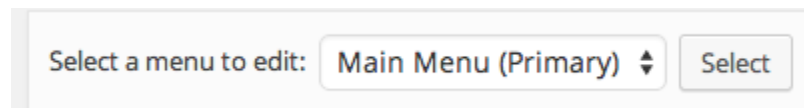
- Primary/Global Navigation - Main Menu
- Secondary Navigation - Footer Menu

To add a page to a menu on the MACPAC site, navigate to Appearance → Menus in the left sidebar of the administrative interface. From there, you can add any page to the main menu or footer menu.

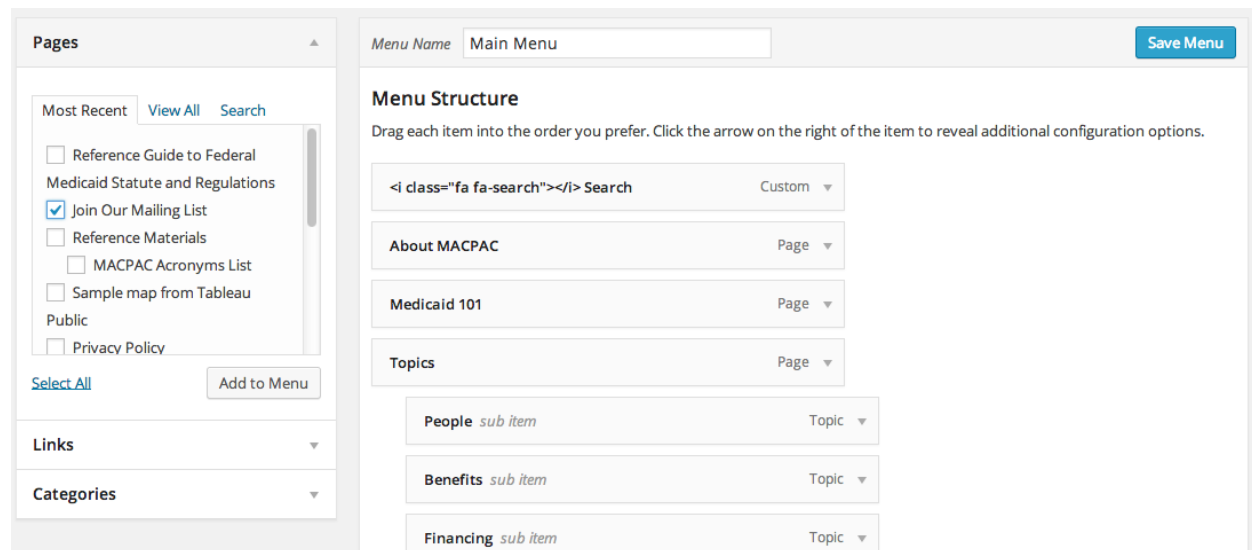
Note: Adding a parent page when editing a page **will not** add that page to any menus.



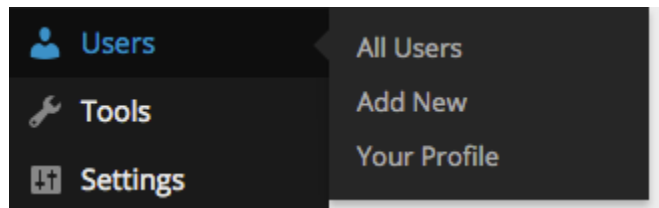
To add a page, use the drop-down at the top to “select a menu to edit” and choose “select.” That menu will then appear in the main area below. Find a page using the pages list at the left by either browsing most recent, searching, or viewing a content type by clicking to expand that list.



Select the checkbox next to that item and click “add to menu.” That page will then appear at the bottom of the menu you are currently editing. Drag it to the correct position in the list. Drag it farther to the right to indent it (making it a sub-item to the page above), or to the left to remove any indenting. Click “save menu” to complete your changes.



To edit the words that appear in the menu item, click the item title to expand the options box. Change the navigation label as needed, using <br> to add a line break to the title. To remove the item, select “remove.” Make sure you save your changes when complete.



## Managing Users

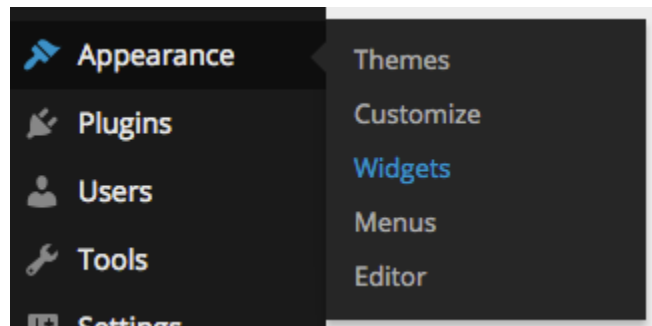
When logged in as an administrator, to view all user information on the site, edit, or delete user accounts, click on “Users” in the left navigation. From here, you can add users, change user roles, and delete users.

## Managing Widgets

Widgets are being used to display HTML content in the footer and sidebar regions throughout the site.

At launch, there are widgets defined for the following content:

- Link to Join the Mailing List page
- Contact information (for the news section)
- Press kit information (for the news section)
- MACPAC’s address (for the footer)
- About MACPAC (for the footer)



To manage these widgets, navigate to “Appearance -> Widgets”

## Managing Taxonomies

There are two taxonomy vocabularies in use on the MACPAC website. The first is a custom vocabulary called Topics. The second is provided by WordPress’s core application, and is named Tags.

The settings for both vocabularies can be accessed by hovering over the “Posts” menu option within the Dashboard, then clicking either Topics or Tags.

The MACPAC site displays tags and topics to users who view content (in either teaser or full page display) that has been associated with terms. Users can also use topics and tags to filter content on the Publications and Search pages.

## Managing Topics

At launch, the Topics vocabulary contains nine terms. The following content types can be associated with one or more topics:

- News
- Publication
- Public Meeting
- Subtopic

To add a topic to a piece of content, put a checkmark next to the desired topic(s) on the right sidebar of the content’s administrative editing form.

### Topic Pages

Each topic has its own page within the MACPAC website. An overview page listing all topics appears at the URL `/topics`, while the specific topic pages can be found at the URL `/topics/term-name` (for example: `/topics/people`). The introductory text that appears for each term on both the overview and individual term pages can be edited by doing the following:

1. Within the WordPress dashboard, hover over the “Posts” option, then click Topics.
2. Hover over the topic term in question and click the “Edit” link.
3. Enter the desired introductory text in the “Description” field. This field accepts raw HTML markup for links, images, headings, etc.
4. Click the “Update” button.

Note: There are three other configuration fields for each term. The Name field controls how the topic name appears to site users throughout the site. The Slug field is used to generate the term page’s URL. The Parent field can be used to create a hierarchical structure between topic terms.

### Topic Order

To control the order in which terms appear on the Topics Overview page (`/topics`) and the home page, you can sort them by hovering over the “Term Order” link at the bottom of the WordPress Dashboard menu and selecting “Order Topics.”

Note: Changing the topic order in the Term Order section only affects how the terms are displayed on the Topics Overview and home pages. If you wish to change the order of the term in the left menu, visit the Main Menu settings (Appearance -> Menus).

## **Subtopics**

To add subtopics to a topic page, create a new post of the type “Subtopic.” On the right sidebar of the editing interface, check the box next to that subtopic’s associated topic. Use the “Order” field beneath the topic box to determine the sort order in which subtopics will appear on the topics pages. (For example, if you want Subtopic A to appear first on the list, put “1” in the order field.

WordPress will automatically pull in associated subtopics when rendering topic pages and sort them accordingly.

## **Managing Tags**

At launch, the tags vocabulary contained 163 terms. The only content type that can be associated with tag terms is the Publication type.

To add a tag to a publication, use the autocomplete widget in the right sidebar of the publication’s administrative editing form. Capitalization matters.

The MACPAC site does not include individual pages for each tag term, and each tag’s description field is never displayed to users. Therefore, it is not necessary to edit tag terms’ descriptions or slug fields, though administrators can edit the term name, if desired, by doing the following:

1. Within the WordPress dashboard, hover over the “Posts” option, then click Tags.
2. Hover over the tag term in question and click the “Edit” link.
3. Edit the term name.
4. Click the “Update” button.

# **Editing Homepage Content**

There are two parts to the homepage that are manageable via the WordPress administrative interface. Those are the “lead in” text at the top of the page and the featured publications and news items in the center of the page (under the Next Meeting Date block).

## **Editing Lead In Text**

To edit the Lead In text, administrators should click on Settings -> General and edit the text in the “tagline” field.

## **Editing Featured Publications and News**

To edit which publications and news items appear on the homepage, enter the editing interface of the homepage as described in the section above. In the Featured Publications field, find and add the desired publications and/or news items. Use drag and drop to order the items as desired. Administrators must feature at least one item but no more than four.

## Commissioners-only Content

There are two types of content that can be posted to the “Commissioners site,” which is a protected area of the site accessible only to those who log into WordPress. The first is HTML content that is managed by WordPress, just like any other page on the site. The other consists of file uploads (PDFs, spreadsheets, images and other documents). The process for protecting each type of content is different.

### Protecting HTML Content

When creating new content within the WordPress interface, there is a fieldset at the bottom of the page called “Restricted.” Check the box to require users to log in to WordPress to access the page.

### Protecting Files

To password-protect uploaded files, click on the “Downloads” link on the left sidebar menu within the Dashboard. Then, click the “Add new” link at the top of the page.

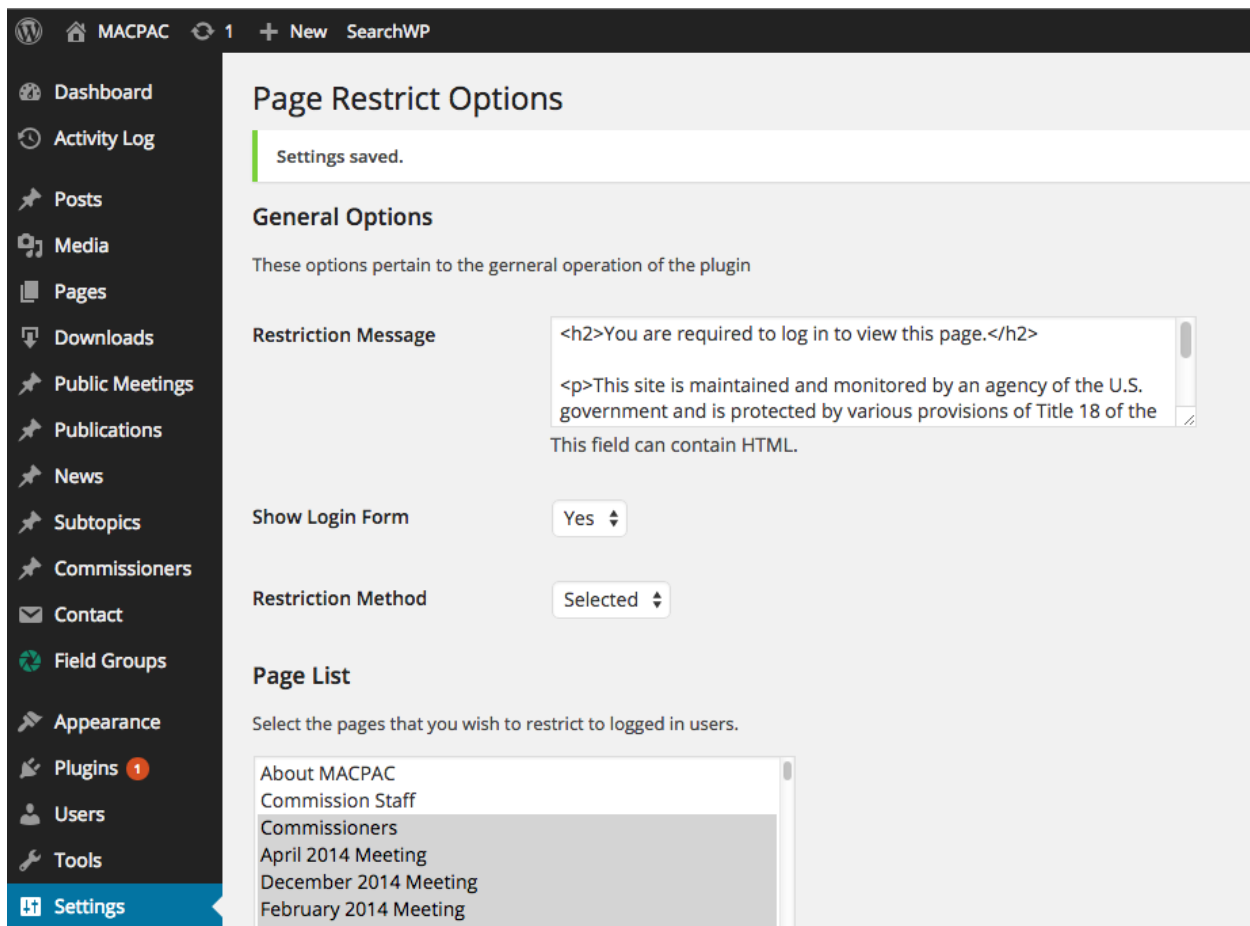
Enter a human-friendly title for your file (January 2015 Commissioners Meeting Agenda, for example). Leave the body and short description fields blank. Click “Add file” under Downloadable Files/Versions, then click “Browse for file” in order to locate the file on your computer.

In the right sidebar, tick the box for “Members Only.” This restricts access to the file to only those who are logged into WordPress. Finally, click “Publish.”

To create a link to your protected file, go to the HTML page in question, and click the “Insert Download” button above the body field. Select the appropriate file and click the “Insert Shortcode” button.

### Log in Message

If a logged out user visits protected pages, they will see a message that indicates they need to log in in order to gain access to the content. The text for that message can be edited by going to Settings -> Page Redirect from the Dashboard.



## Updating the Statute and Regulations Guide

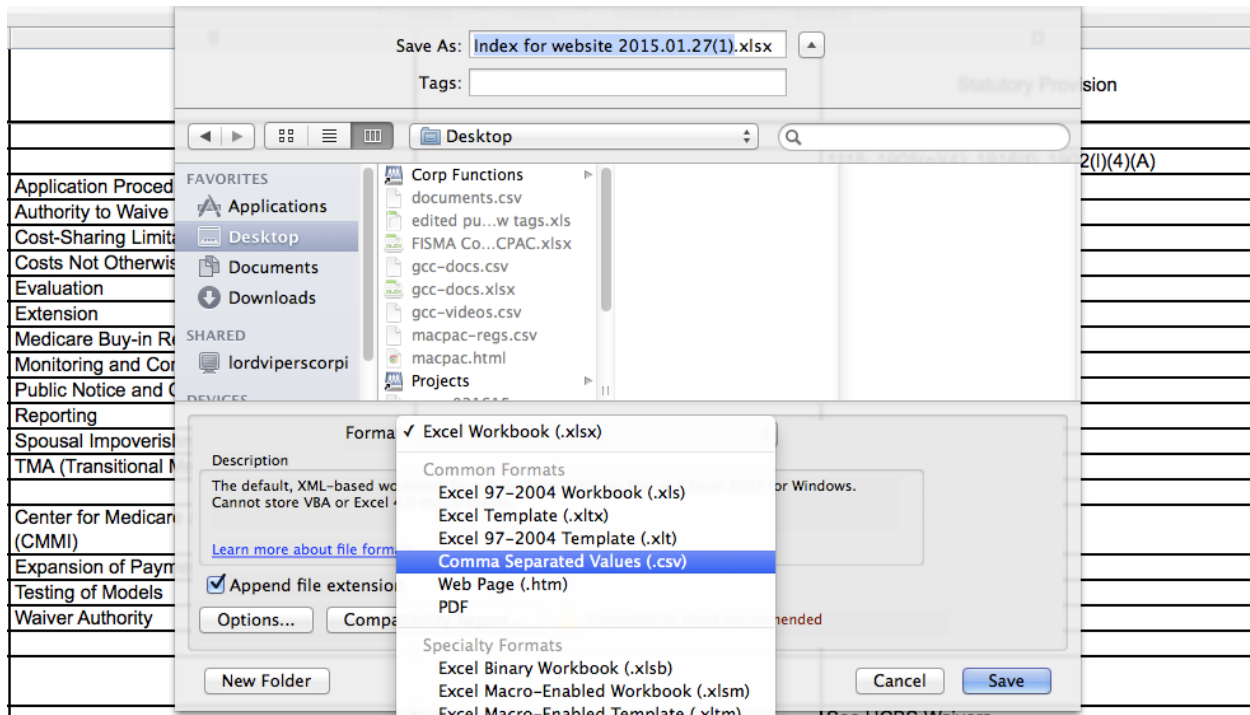
Forum One wrote a custom WordPress plugin that allows site administrators to upload a specially formatted version of the Statute Guide to WordPress that is translated into HTML. The plugin provides a [shortcode](#) that content creators can cut and paste into body fields where the HTML version of the Guide should appear. This prevents MACPAC staff from needing to edit raw HTML with WordPress to update the Guide. Instead, they can edit a CSV file through Excel or Google Documents and upload a newer version to publish updates.

### CSV File

The plugin requires an administrator to upload a version of the Guide as a Comma Separated Values (CSV) file. This format can be read by both Microsoft Excel and Google Documents, among other programs.

#### Exporting a CSV from Excel

You can convert an Excel file (XLS or XLSX) by opening it in Excel, then going to File -> Save As. Change the “Format” field to “Comma Separated Values (.csv)” and click “Save.”

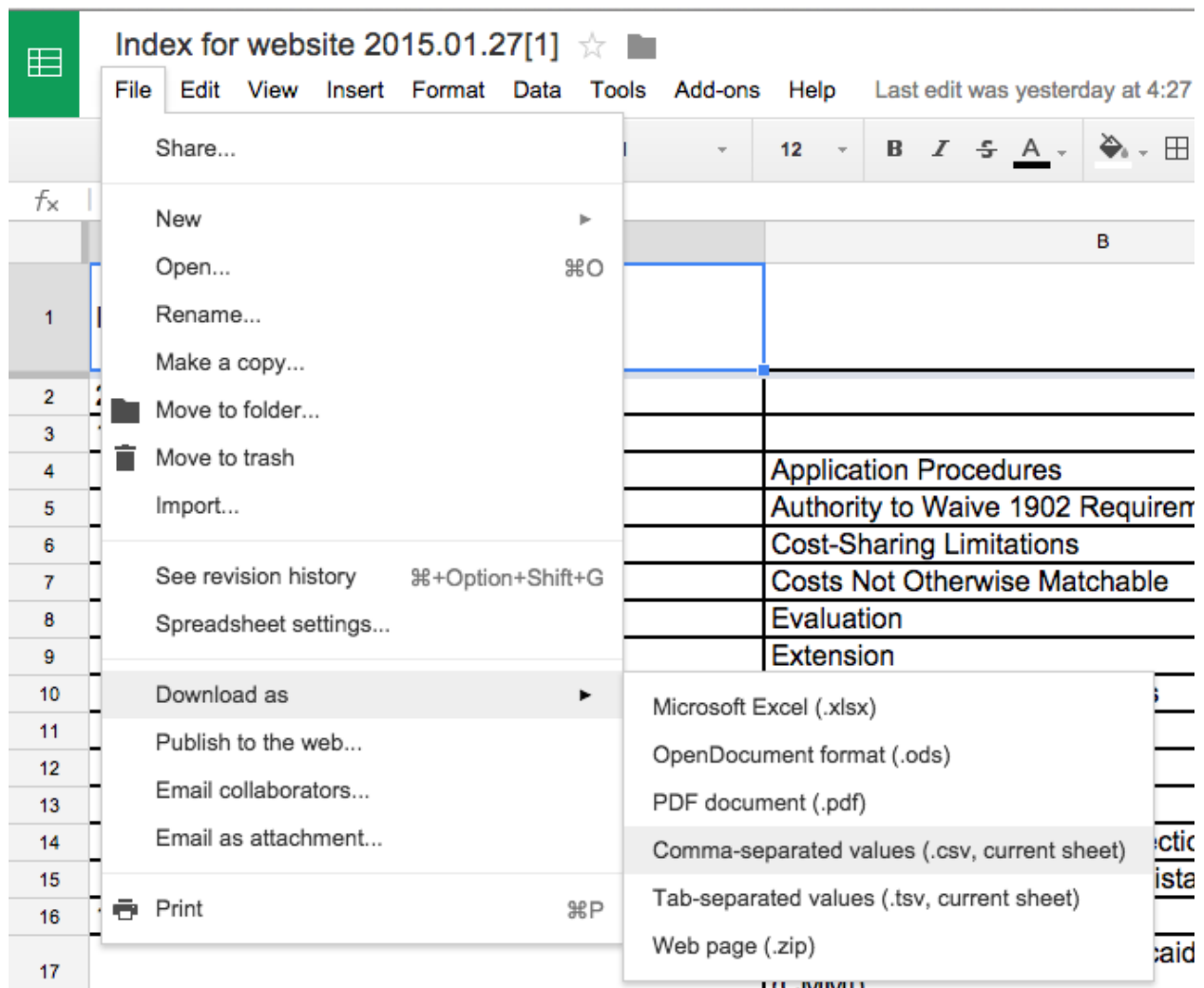


## Exporting a CSV from Google Documents

You can upload an Excel file (XLS and XLSX) to Google Documents as a new spreadsheet. That can be accomplished by doing the following:

1. Go to Google Drive and click the “Create” button. Select “Spreadsheet.”
2. In the new spreadsheet, go to File -> Open and then browse for the Excel file on your computer.

To export the file as a CSV, go to File -> Download As. Select “Comma-separated values (.csv, current sheet). Save the file to your computer’s file system.



## CSV Formatting Tips

The plugin expects the CSV file to be formatted in a specific way. Here are some guidelines:

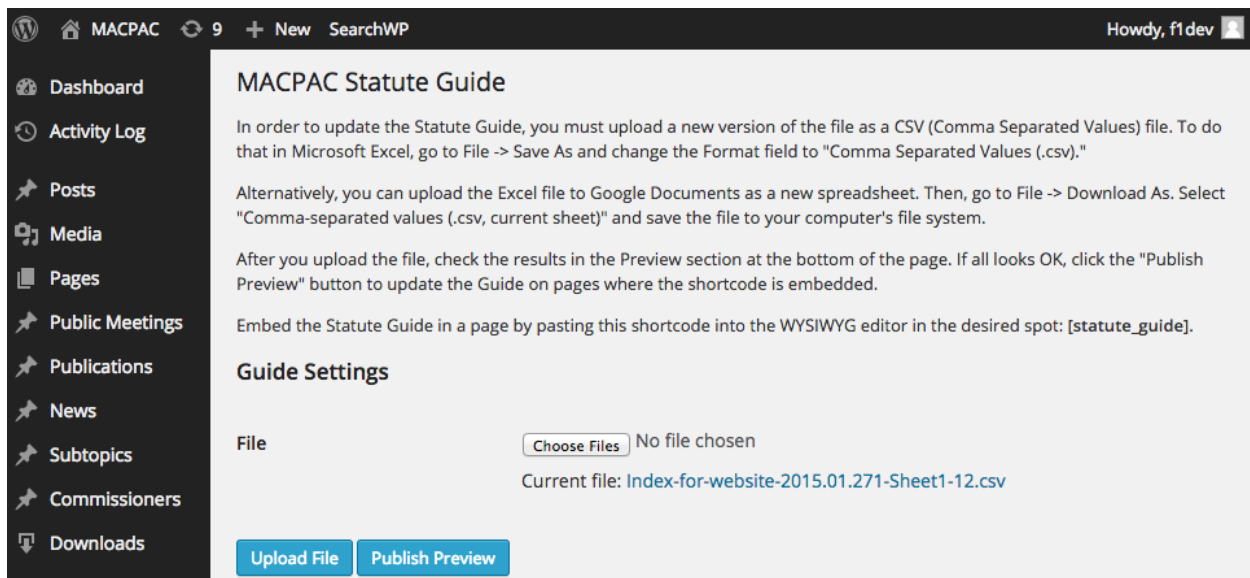
- There can be three levels of indentation with regard to “Issue” name. In the CSV file, each level of indentation should be placed in a separate column (columns A, B or C). For example, a value with no indentation would be placed in Column A. A value that should be nested under one level goes in Column B (leaving Column A blank). A value nested under two levels goes in Column C (leaving both Columns A and B blank). **Do not attempt to add columns to the CSV for the purpose of adding additional levels of indentation. The plugin only supports three levels.**
- The CSV must not contain special characters (non-UTF-8 characters). This includes super- and subscript characters that might be used to denote endnotes and footnotes. The plugin will strip any special characters it finds, making a best attempt to replace them with a plain-text equivalent. In cases where that fails, special characters will be stripped altogether.



- Empty columns to the right of the “State Plan” column and empty rows that appear anywhere in the file should be removed from the CSV prior to upload to WordPress.
- Remove any notes or text that might appear outside of the Guide itself, including footnotes. Those should be placed directly into WordPress around the table’s shortcode.
- The CSV must not contain any cells that have been split into rows or columns. Each row should have 6 columns.
- Any text formatting added to the file in Excel (bolding, links, italics, etc) will be stripped when it is converted to a CSV, and therefore cannot be used for formatting purposes by the plugin.

## Uploading the CSV

Once you have a correctly formatted CSV file, upload it to WordPress by going to Settings -> MACPAC Statute Guide. (Note: You may find it easiest to download the current file from the interface, edit it and re-upload).



A preview version of the Guide in HTML will appear at the bottom of the page. Use this to do a quick sanity check that any edits correctly appear and that the formatting is intact. When all looks OK, click the “Publish Preview” button to update any places on the site that embed the table with its shortcode. (Note: The “preview” mode is very, very basic and does not include functionality for rolling back to previous versions of the guide file. It is intended only as a quick sanity check. In fact, the plugin deletes older versions of the CSV file every time a new CSV is uploaded. If the preview does not render as expected, you will need to re-upload new CSV files until the preview matches what’s desired on the site.)

## Embedding the Guide with a Shortcode

To add the Statute Guide to the publicly accessible site, create or edit a new post or page and place the following into the body field: [statute\_guide]. This is a WordPress shortcode. In the editing interface, you will see only “[statute\_guide]”. However, when viewing the page or post from the end user’s point of view, the HTML table itself will render.

Note: The table is only expected to be embedded on a page titled “Reference Guide to the Federal Medicaid Statute and Regulations.” The “[sticky header](#)” functionality and styling will only apply to this page. While the shortcode can, theoretically, be embedded on any post or page, the styling and sticky header will not render elsewhere.

## Contact Form

The MACPAC site includes a contact form that users can complete in order to get in touch with MACPAC. Upon submit, the form generates an email to [macpac@macpac.gov](mailto:macpac@macpac.gov). The form is located at the URL /contact-us.

To edit the form’s settings, click the “Contact” link on the Dashboard’s menu. Then click “edit” next to the form labeled “Contact form.” Within this interface, administrators can add/remove fields and update the email address and information contained within the email.

To add or remove additional content to the body area of the Contact Us page, simply edit the page as you would any other, taking care not to delete the “[short code](#)” within the body field. This shortcode is a placeholder for the actual form that can be seen when users browse the page.

## Search Settings

The sitewide keyword search that is accessible via the left menu was built using two contributed plugins: [SearchWP](#) and [FacetWP](#).

To change which post types appear in the search results, give content in specific fields more “weight” or “boost,” or exclude certain content from search results, visit the SearchWP configuration page by hovering over the Settings menu option in the Dashboard, then clicking “SearchWP.”

FacetWP provides the faceted search interface present on the search results and publications pages. The settings for each are located by going to Settings -> FacetWP. Changing settings within this section is not recommended unless you know what you are doing.

## Plugins

The MACPAC site uses the following contributed plugins. To access the list of plugin, along with links to their configuration pages, click the “Plugins” link in the Dashboard menu.

Plugin Name	Purpose
All in One WP Security	Provides FISMA-related security functionality
ARYO Activity Log	Provides logging of the following: <ul style="list-style-type: none"> <li>• Core Updates</li> <li>• <i>Posts/Pages</i> - Created, Updated, Deleted</li> <li>• <i>Tags/Topics</i> - Created, Edited, Deleted</li> <li>• <i>Taxonomies</i> - Created, Edited, Deleted</li> <li>• <i>Media</i> - Uploaded, Edited, Deleted</li> <li>• <i>Users</i> - Login, Logout, Login has failed, Update profile, Registered and Deleted</li> <li>• <i>Plugins</i> - Installed, Updated, Activated, Deactivated, Changed</li> <li>• <i>Themes</i> - Installed, Updated, Deleted, Activated, Changed (Editor and Customizer)</li> <li>• <i>Widgets</i> - Added to a sidebar / Deleted from a sidebar, Order widgets</li> <li>• <i>Menus</i> - A menu is being Created, Updated, Deleted</li> <li>• <i>Settings</i> - General, Writing, Reading, Discussion, Media, Permalinks</li> </ul>
Breadcrumb NavXT	Provides breadcrumb navigation
Custom Field Suite (CFS) Hyperlink Add-on	Provides a link custom field type
Contact Form 7	Provides functionality to allow administrators to create custom forms. Used by the Contact Us (/contact-us) form
Custom Field Suite (CFS)	Provides a series of field types used to extend various content types
Custom Post Type UI	Provides an administrative interface for defining and managing custom content types
Custom Taxonomy Order NE	Provides an interface for sorting taxonomy terms into a custom order. Used to order the Topic terms
Disable Comments	Disables WordPress’s core commenting functionality

Display Widgets	Adds a checkbox for administrators to use when determining whether widgets show up on specific pages and posts.
Download Monitor	Provides functionality to password-protect uploaded files (documents, images, etc)
FacetWP	Creates faceting for listing pages and search results
MACPAC Statute Guide	Provides an administrative interface for uploading the Statute and Regulations Guide as a CSV file and generating the HTML code for a table that can be edited (via shortcode) into posts and pages.
Mail From	Allows the system emails to come from a configurable sender name & email address.
MCE Table Buttons	Adds a table button to the WYSIWYG editor.
Page Restrict	Allows WordPress-managed HTML content to be password-protected. <i>(This plugin has been heavily patched by Forum One.)</i>
Remove Dashboard Access	Allows administrators to block access to the WordPress Dashboard to certain roles. Used to prevent Commissioners (who have the role “subscriber”) from being able to access to the Dashboard.
SearchWP	Provides a mechanism for configuring search index.
Visual Term Description Editor	Adds a WYSIWYG editor the term description editing interface.
WP-CFM (Configuration Management)	Provides an interface for saving configuration into code for easier version management. Currently, the content types, field groups and FacetWP settings are stored here.
WordPress Fast Full Page Cache (WP-FFPC)	Provided memcached caching.

## Site Map

This is the website site map that shows the navigation menus and their corresponding drop down items.

## Main Content Navigation

### Topics

- People
- Benefits
- Financing
- CHIP
- Payment and Delivery Systems
- Spending
- Access and Quality
- Program Administration
- Medicaid Other Payers

### Medicaid 101

- People
- Benefits
- Financing
- Payment and Delivery Systems
- Spending
- Access and Quality
- Program Administration
- Medicaid and Other Payers

### Publications

- Reports to the Congress
- Report Chapters
- MACStats (includes tables & databooks)
- Fact Sheets
- Issue Briefs
- Contractor Reports
- State Policy Compendia
- Commission Meeting Materials (includes transcripts & presentations)
- Presentations
- Guide to Federal Medicaid Statute and Regulations (web only)
- Data Sources and Methodology
- MACPAC Comments on Federal Reports and Regulations

## Enterprise Navigation

### News

- News
- Press Releases
- Email Sign Up
- Press Kit
- Contact Us - Office and Press

### Public Meetings

- Upcoming
  - Agenda
- Past Meetings
  - Agenda, Slides, Transcripts

### Commissioner Sign In

- Sign in

### Employment opportunities

- Open Position Detail

## Footer

- Employment Opportunities
- Contact Info
- Social Media Icons
- Press Kit
- Submit Public Comment
- Report Abuse
- Report Broken Links
- Privacy Policy
- Credits

### About MACPAC

- Statute / Mission
- Commissioners
- Staff

### MACSTATS

- Listing page

# Technical Notes on Caching

The MACPAC site uses WordPress Fast Full Page Cache (WP-FFPC) to provide database object caching through memcached. The current cache lifetime is six hours (21600 seconds).

Whenever a new post (of any type) or taxonomy term is created or updated, the entire cache will be invalidated. However, there are other items that can be edited via WP (the MACPAC Statute Guide, Homepage lead-in text), etc that will not trigger a cache invalidation.

If you cannot wait up to six hours for such a change to appear on the site, visit Settings -> WP-FFPC and click the “Empty Cache” tab at the bottom of the page. Then click the “clear cache” button.