

# How to Complete the AIP Supplemental Information and Spend Plan in ACO-MS

Version 3 | April 2025

This tip sheet instructs ACOs on how to complete the Advance Investment Payments (AIP) supplemental information spend plan requirements in the [ACO Management System \(ACO-MS\)](#). Additional information on AIP and eligibility to receive advance investment payments can be found in the [AIP Guidance](#).

## Electing AIP and Navigating to Supplemental Information

1. Answer “yes” to the AIP question in Phase 2 of your Shared Savings Program Initial Application task (only eligible ACOs will see this question).
2. Navigate to your Dashboard and select the AIP supplemental information task.

## Completing and Submitting AIP Supplemental Information

1. ACO-MS will automatically populate your ACO’s total projected advance investment payments based on the information in the ACO’s *Participation Options Report*.
2. Complete the spend plan with projected spending amounts.
3. Enter the specific use of advance investment payments as free text in the “Payment Use” column. Add and complete a new row for each of your distinct payment uses.
  - Select one of the three categories using the drop-down in the “General Spend Categories” column.
  - Select the “General Spend Subcategory” using the dropdown options to further categorize the payment use. If none apply, select “Other.” (If you select “Other,” make sure to provide a clear description in the free text “Payment Use” column).
  - Indicate the projected performance year or years in which you plan to use each line item by entering the projected amounts in dollar values for each corresponding “Payment Use” row and “Performance Spending Year” column. If you do not intend to use funds for a line item in any given year (but have projected spending in other years within this row), enter “\$0” or leave the field blank.
4. The “Projected Total Advance Investment Payments” must be equal to the Future Projected Spending” You may save progress on your spend plan and leave the tab at any time, but you will not be able to submit your AIP supplemental information to CMS until all required fields (including certifications) are complete.
5. Once all of your total projected advance investment payments are accounted for in the projected spending columns within the spend plan, the “Remaining Funding to Allocate” field (calculated by ACO-MS) will display as “\$0.” **You will not be able to submit your spend plan for CMS review unless this field is equal to “\$0.”**

*Disclaimer: This communication material was prepared as a service to the public and is not intended to grant rights or impose obligations. It may contain references or links to statutes, regulations, or other policy materials. The information provided is only intended to be a general summary. It is not intended to take the place of either the written law or regulations. We encourage readers to review the specific statutes, regulations, and other interpretive materials for a full and accurate statement of its contents. This document is published, produced, and disseminated at U.S. taxpayer expense.*

6. Complete the certifications for your AIP supplemental information application.
7. Select the “Submit” icon.

### IMPORTANT!



- You can **download a copy** of your completed spend plan for your records by selecting the download icon in the bottom right-hand corner below the spend plan in the AIP supplemental information task.
- You will not be able to make edits to the spend plan after submitting it for CMS review until the **Phase 2 RFI submission window** of the Shared Savings Programs application.

## SAMPLE COMPLETED SPEND PLAN

Payment Use	General Spend Category	General Spend Subcategory	Projected Spending Year 1	Projected Spending Year 2	Projected Spending Year 3	Projected Spending Year 4	Projected Spending Year 5
Hire new behavioral health clinician	Increased staffing	Behavioral health case managers	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000
Update EHR	Health care infrastructure	Investment in certified electronic health record technology (CEHRT)	\$10,000	\$1,500	\$1,500	\$1,500	\$1,500
MTM program	Provision of Accountable Care for underserved beneficiaries	Medically tailored meals for a chronic condition	\$50,000	\$50,000	\$50,000	\$50,000	\$50,000
Ride share coupons	Provision of Accountable Care for underserved beneficiaries	Vouchers for ride-share services	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000
Add wheelchair lift to clinic	Health care infrastructure	Practice Physical accessibility improvements	\$4,000	\$0	\$0	\$0	\$0
Subtotal			\$130,000	\$117,500	\$117,500	\$117,500	\$117,500

Spend Plan Summary	
Projected Total Advance Investment Payments	\$600,000
Future Projected Spending	\$600,000 (Sum of Subtotal Row)
Remaining Funding to Allocate	\$0
Advance Investment Payments Received	\$0

### QUESTIONS?

Click the SSP Helpdesk icon (located within the [ACO-MS](#) banner) or email [SharedSavingsProgram@cms.hhs.gov](mailto:SharedSavingsProgram@cms.hhs.gov).