



**AccreditNet 3.0**  
**URAC Client User Guide**  
**Updated: April 2024**

## Contents

Support.....	4
AccreditNet Helpdesk .....	4
Client Services Inquiries .....	4
Accreditation Seal Use Approval, Press Release Approval and All Marketing-Related Inquiries .....	4
Supported Browsers and Platforms .....	5
Login.....	6
Logging Out .....	8
Multi-Factor Authentication .....	9
Authenticator (Recommended) .....	11
SMS .....	12
Email.....	13
Dashboard.....	15
Notifications.....	20
Documents.....	22
Resource Documents .....	22
Contacts .....	23
Application .....	24
Processes.....	27
Accreditation Milestones.....	29
Instruments.....	31
Instrument Overview Page .....	32
Instrument Question Types .....	33
Instrument Navigation .....	35
Request for Information (RFI) .....	36
Export.....	38
Issuer information.....	39
Accreditation/Certification .....	41
Seals .....	42

Notice of Change (NOC) .....	43
Important Contact Information .....	46
Support.....	46
AccreditNet Helpdesk .....	46
Client Services Inquiries .....	46
Accreditation Seal Use Approval, Press Release Approval and All Marketing-Related Inquiries .....	46

## Support

<https://www.urac.org/contact/>

### AccreditNet Helpdesk

The helpdesk is available Monday through Friday from 8 a.m. to 5 p.m. Eastern Time. To request assistance:

Phone: (202) 216-9010 (option 6)

Email: [accreditnet@urac.org](mailto:accreditnet@urac.org)

### Client Services Inquiries

Phone: (202) 326-3942

Email: [clientrelations@urac.org](mailto:clientrelations@urac.org)

### Accreditation Seal Use Approval, Press Release Approval and All Marketing-Related Inquiries

Phone: (202) 326-3968

Email: [marketing@urac.org](mailto:marketing@urac.org)

## Supported Browsers and Platforms

- **Chrome**
- **Edge**
- **Safari**

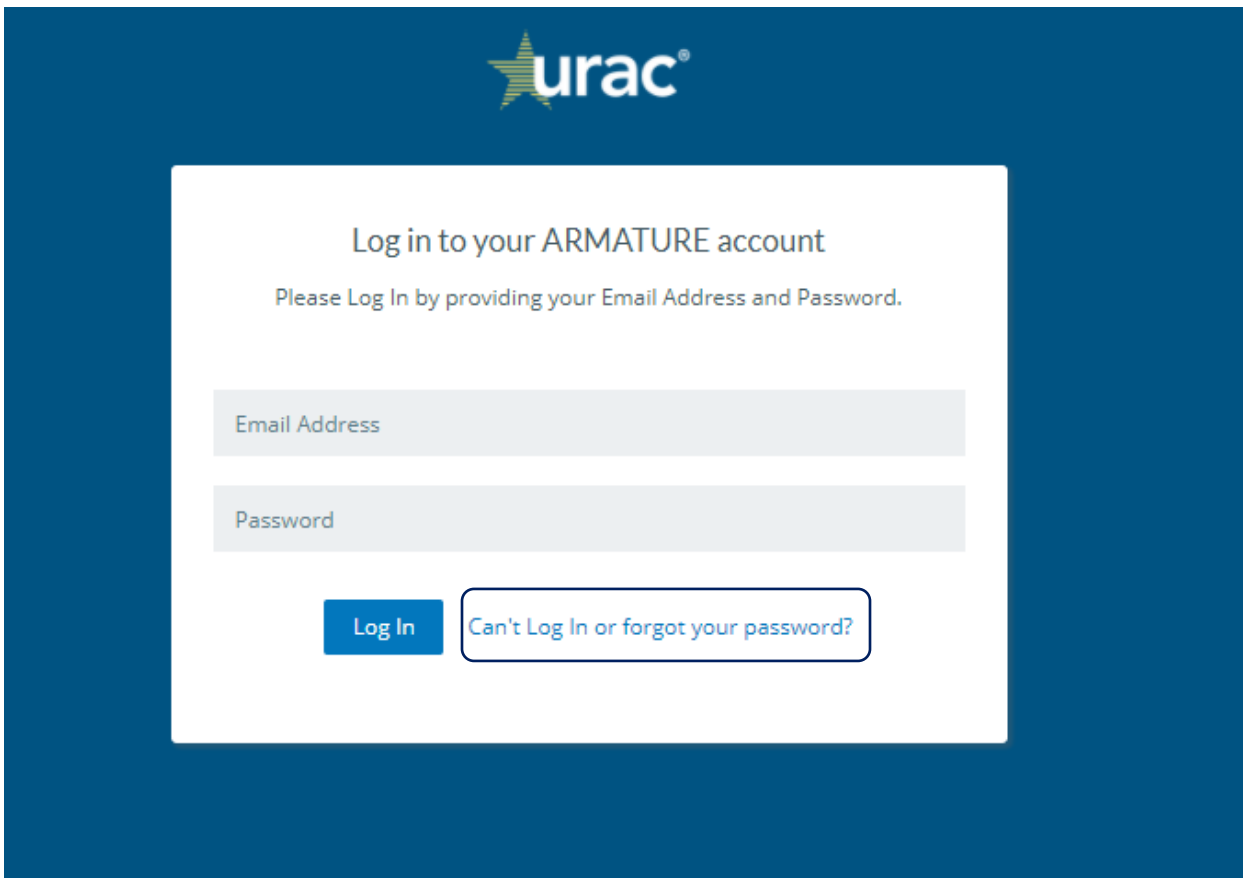
For best user experience we recommend using **Chrome**.

Other Browser Requirements:

- JavaScript must be enabled on your web browser
- Cookies must be enabled on your web browser

## Login

Launch AccreditedNet® 3.0 using this URL from your browser: <https://accreditnet.urac.org/#/auth/login>



If this is your first time accessing AccreditedNet® 3.0, you will need to use the “**Can’t Login or forgot your password**” link. This will allow for the system to send a reset password email to your user account.

**Important!** If you enter your email address incorrectly or enter a non-existing email, the reset password email will not be sent.

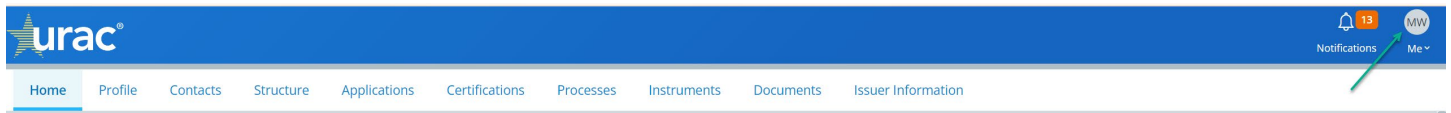
Enter your email address on the “**Having trouble logging in?**” screen.

The Password Reset Confirmation email will be sent from “**no-reply@urac.org**”.

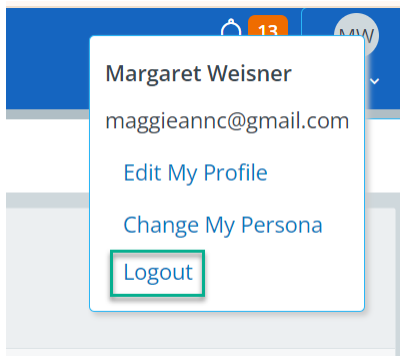
**Important!** You should request the “no-reply@urac.org” email address to be white-listed in your organization’s email system.

## Logging Out

The “**Me**” icon located in the blue banner, in the top right of your Home Screen/Dashboard provides access to log out of the system.



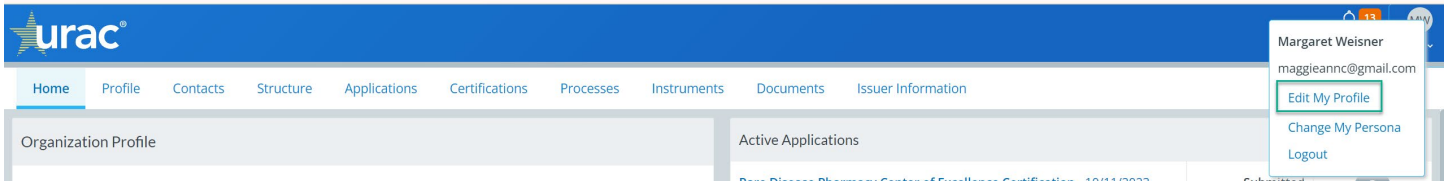
Select the “**Me**” icon, the “**Logout**” selection is listed:



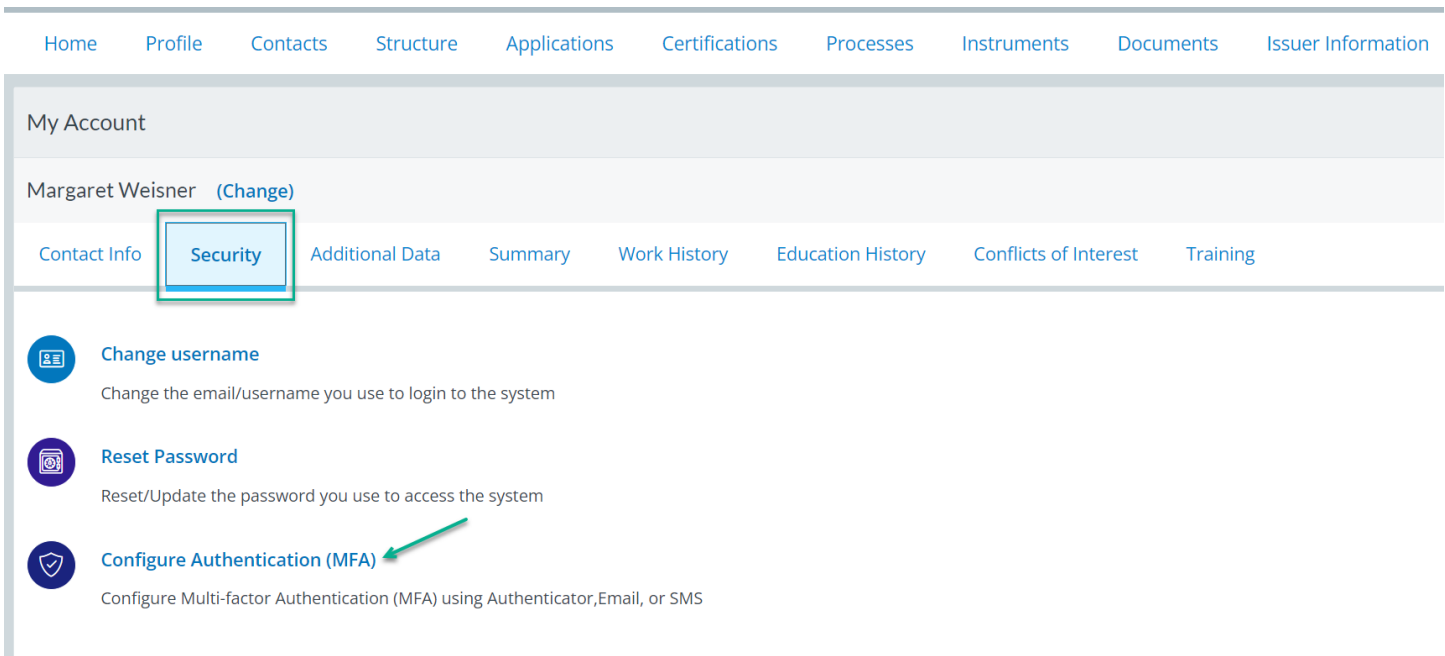


## Multi-Factor Authentication

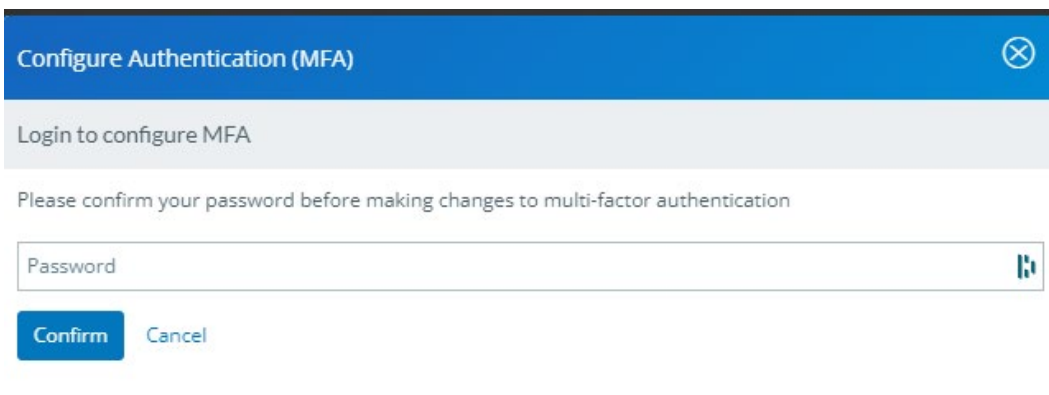
The “Me” icon, located in the blue banner, top right corner of your screen provides access to configure multi-factor authentication. After selecting the “Me” icon, select “Edit My Profile”.



Select the “Security” tab, then “Configure authentication (MFA)”:



You will be prompted to re-enter your system password:



Three authentication methods are available, Authenticator, SMS and/or Email.

Configure Authentication (MFA)

Authentication Method	On	Off
<b>Authenticator (Recommended)</b> Use a smart phone authenticator application to generate a one time password Requires smart phone (iOS, Android, Windows 10 Mobile) Requires authenticator application <a href="#">Show Apps</a>		
<b>SMS</b> Provide a phone number to receive a one time password via SMS Requires phone Requires SMS		
<b>Email</b> Provide an email address to receive a one time password via email Requires email address		

Cancel

**Important!** While Authenticator is the recommended method, please configure an additional method as well. This will ensure that the loss of the Authenticator application does not result in an inability to access the system.

### Authenticator (Recommended)

You have the choice of 3 authenticator applications: Google, LastPass and/or Microsoft. Using your cell phone authenticator application, add an account and scan the code that displays on the AccreditedNet 3.0 screen. Then enter the Authentication code provided.

Authenticator

Configure Authenticator based MFA

Use a smart phone authenticator application to generate a one time password

Google Authenticator


iOS | Android | Windows 10 Mobile

LastPass Authenticator

iOS | Android | Windows 10 Mobile

Microsoft Authenticator

iOS | Android | Windows 10 Mobile



Authentication code

Verify

You will be prompted to add an Authentication code from your Authenticator each time when logging into AccreditedNet 3.0.

## SMS

Enter a phone number that accepts SMS messages.


Text/SMS

Configure SMS based MFA

Provide a phone number to receive a one time password via SMS

Requires phone, Requires SMS

Phone Number

 Send Code

A SMS text will be sent to your phone containing a Verification Code to be entered.


Text/SMS

Message Sent

A text message has been sent to 703-919-3051

If you did not receive your text [click here](#) to resend

Authentication code

 Verify [Back](#)

You will be prompted to add an authentication code received via SMS text each time when logging into AccrediNet 3.0.

## Email

Provide an email address to receive a one-time password via email.

Email

Configure email-based MFA

Provide an email address to receive a one-time password via email

A value is required

Send code

Once an email address is provided, you will receive an email containing a verification code to be used to enter your account.

Your one-time ARMATURE Fabric for URAC verification code

N

noreply@armaturecorp.com

To

This sender noreply@armaturecorp.com is from outside your organization.

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

This email originated from outside of the organization. Do not respond or open attachments unless you recognize the sender and know the content is safe.

Dear Margaret,

Below is your one-time verification code for your ARMATURE Fabric for URAC account.

1035100

Please note that this code will be valid for 15 minutes. After this time you will need to request a new code.

If you did not request a verification code, please contact your system administrator immediately.

Email

Email sent

An email has been sent to [REDACTED]

If you did not receive your email [click here](#) to resend

Authentication code

Verify

Back

You will be prompted to add an authentication code received via the provided email address each time when logging into AccrediNet 3.0.

**Important!!** Once configured you will be prompted to use authentication every time that you log into the system. Always configure at least 2 methods of authentication so that you have a back up method to access the system. The URAC Service Desk can assist you in this installation.

## Dashboard

When you log into AccrediNet 3.0 you will be presented with your Organization's Home Screen or Dashboard.

Home	Profile	Contacts	Structure	Applications	Certifications	Processes	Instruments	Documents	Issuer Information												
<b>Organization Profile</b> URAC Training Org (2021-ORG-00755) <a href="#">Edit</a> Washington, DC <a href="http://www.uractrainingorg.org">www.uractrainingorg.org</a> <b>Primary Contact</b> Margaret Weisner <a href="mailto:maggieannc@gmail.com">maggieannc@gmail.com</a> 2023263962																					
<b>Notice of Change</b> <div>             Please select the notice of change you would like to submit             <input type="button" value="Submit"/> </div> <table> <tr> <td>NOC: Change in "Doing Business As" or Trade Name</td> <td>Processing</td> </tr> <tr> <td>Created 02/14/2024</td> <td></td> </tr> <tr> <td>NOC: Change in Corporate Status</td> <td>Processing</td> </tr> <tr> <td>Created 10/18/2023</td> <td></td> </tr> <tr> <td>NOC: Change in Corporate Name</td> <td>Processing</td> </tr> <tr> <td>Created 04/12/2023</td> <td></td> </tr> </table>										NOC: Change in "Doing Business As" or Trade Name	Processing	Created 02/14/2024		NOC: Change in Corporate Status	Processing	Created 10/18/2023		NOC: Change in Corporate Name	Processing	Created 04/12/2023	
NOC: Change in "Doing Business As" or Trade Name	Processing																				
Created 02/14/2024																					
NOC: Change in Corporate Status	Processing																				
Created 10/18/2023																					
NOC: Change in Corporate Name	Processing																				
Created 04/12/2023																					
<b>Active Applications</b> <table> <tr> <td>Health Content Provider - 08/09/2023 App # APP-1121</td> <td>Open</td> <td>1</td> </tr> <tr> <td>Health Web Site - 03/14/2024 App # APP-1207</td> <td>Submitted</td> <td>0</td> </tr> <tr> <td>Health Plan - 11/09/2022 App # APP-925</td> <td>Open</td> <td>1</td> </tr> </table>										Health Content Provider - 08/09/2023 App # APP-1121	Open	1	Health Web Site - 03/14/2024 App # APP-1207	Submitted	0	Health Plan - 11/09/2022 App # APP-925	Open	1			
Health Content Provider - 08/09/2023 App # APP-1121	Open	1																			
Health Web Site - 03/14/2024 App # APP-1207	Submitted	0																			
Health Plan - 11/09/2022 App # APP-925	Open	1																			
<b>Certifications</b> <input checked="" type="checkbox"/> Show Active Only No Active Certifications No certifications listed for this organization																					
<b>Scheduled Items</b> <table> <thead> <tr> <th>Item</th> <th>Begin</th> <th>End</th> </tr> </thead> <tbody> <tr> <td>APP: Health Content Provider Certification v4.1</td> <td>Feb 1st</td> <td>May 1st in a month</td> </tr> <tr> <td>APP HP: Health Plan Accreditation v8.1</td> <td>Feb 1st</td> <td>May 1st in a month</td> </tr> <tr> <td>APP: Health Web Site Accreditation v4.1</td> <td>Apr 6th</td> <td>Jun 30th in 3 months</td> </tr> </tbody> </table>										Item	Begin	End	APP: Health Content Provider Certification v4.1	Feb 1st	May 1st in a month	APP HP: Health Plan Accreditation v8.1	Feb 1st	May 1st in a month	APP: Health Web Site Accreditation v4.1	Apr 6th	Jun 30th in 3 months
Item	Begin	End																			
APP: Health Content Provider Certification v4.1	Feb 1st	May 1st in a month																			
APP HP: Health Plan Accreditation v8.1	Feb 1st	May 1st in a month																			
APP: Health Web Site Accreditation v4.1	Apr 6th	Jun 30th in 3 months																			

Note: If you have access to multiple organizations, AccrediNet® 3.0 will list the organizations for access selection.

Your Organizations			
Please select an organization from the list below.			
Name	Id	Type	Location
<a href="#">ABC Company</a>	2017-ORG-00012	Organization	Washington, District of Columbia
<a href="#">URAC Training Org</a>	2021-ORG-00755	Organization	Washington, District of Columbia
<a href="#">URAC's Prod Test Org</a>	2022-ORG-00161	Organization	Washington DC, District of Columbia

Select the organization you wish to view to be taken to that organization's Dashboard/Home Screen.

Your Dashboard/Home Screen provides a summary view, which is your ability to see what's in progress at a glance with your application. In addition, navigation tabs located across the top of the screen provide more in-depth information. Each section of the Dashboard/Home Screen in the screenshot below is identified by a letter. You'll find more information about each of these sections in the screenshots that follow.

The screenshot shows the URAC dashboard with the following sections labeled:

- A:** Organization Profile for URAC Training Org (2021-ORG-00755). It includes contact information for Margaret Welsner.
- B:** Notice of Change section, showing two entries: "NOC: Change in 'Doing Business As' or Trade Name" and "NOC: Change in Corporate Name".
- C:** Active Applications table, listing three applications: "Rare Disease Pharmacy Center of Excellence Certification", "Health Equity", and "Health Plan".
- D:** Certifications table, showing "THH-19 expires 07/12/2026" and "Telehealth v3.0: Consumer-to-Provider".
- E:** In-Progress Reviews section, showing "APP: Rare Disease Pharmacy Center of Excellence Certification v3.0" with a "Requires Feedback" button.
- F:** Scheduled Items table, showing two items: "APP: Rare Disease Pharmacy Center of Excellence Certification v3.0" and "APP HE: Health Equity Accreditation v1.0".



- A. The top-left screen shows general organization information. Additional detailed information can be found by navigating to the “**Profile**” tab.

Home **Profile** Contacts Structure Applications Certifications Processes Instruments

Organization Profile **A**

You are assigned to more than 1 organization.  
[Click here to select a different organization](#)

URAC Training Org (2021-ORG-00755) [Edit](#)

Washington, DC

Primary Contact  
 Margaret Weisner  
[maggieannc@gmail.com](mailto:maggieannc@gmail.com)  
 2023263962

- B. “**Notice of Change (NOC)**” – gives you the ability to add new NOC by selecting from the drop-down menu or navigate to an existing NOC.

Notice of Change **B**

Please select the notice of change you would like to submit

[Submit](#)

NOC: Change in “Doing Business As” or Trade Name Processing  
 Created 03/13/2024

NOC: Change in Corporate Name Processing  
 Created 04/12/2023

- C. “**Active Applications**” – shows the list of incomplete application(s) with indicator on whether there are activities waiting for you on the application. You can also navigate to the “**Applications**” tab to view all applications (present and past).

Active Applications <b>C</b>	
Rare Disease Pharmacy Center of Excellence Certification - 10/11/2023 App # APP-1286	Submitted 0
Health Equity - 10/11/2023 App # APP-1285	Open 1
Health Plan - 11/09/2022 App # APP-925	Open 1

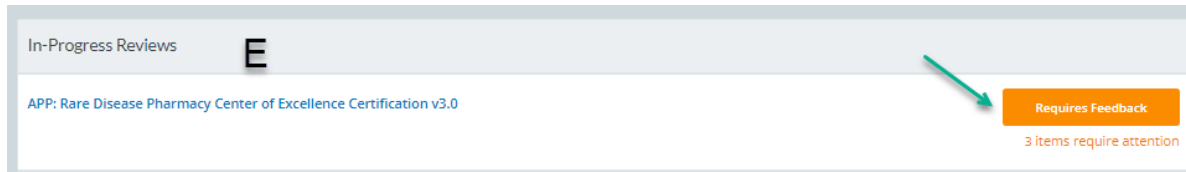
- D. Active accreditations and/or certifications are displayed on the right side of the screen in the “**Certifications**” area. Clicking on the “**Certification Type**” or navigating to the “**Certifications**” tab provides detail of the accreditation/certification.

Certifications <b>D</b>	
<input checked="" type="checkbox"/> Show Active Only	
XXX010001 expires 09/01/2026 Case Management Accreditation 7.0	Active
MHW010002 expires 09/03/2024 Mental Health at Work Accreditation v1.0	Active

**Important!** The Certification section displays active accreditations and/or certifications by default. If you wish to view prior, now expired accreditations and/or certifications, unselect the “Show Active Only” checkbox.

Certifications <b>D</b>	
<input type="checkbox"/> Show Active Only	
ACA-1 expires 05/01/2022 Accountable Care 1.0	Expired
XXX010001 expires 09/01/2026 Case Management Accreditation 7.0	Active

- E. **“In-Progress Reviews”** - displays the Application Instruments that are in the **Review** process, specifically those that have been returned, **Requesting Further Information (RFI)**. Selecting the Application name link will take you directly into the Instrument itself, while the orange **“Requires Feedback”** displays the number of items returned for further information (**RFI**).



- F. **“Scheduled Items”** - shows the list of Instruments scheduled and not completed. You can also navigate to **“Instruments”** tab to view all instruments (present and past).

Item	Begin	End
APP: Rare Disease Pharmacy Center of Excellence Certification v3.0	Sep 15th	Jan 2nd 3 months ago
APP HE: Health Equity Accreditation v1.0	Feb 1st	Jun 1st in 2 months
APP HP: Health Plan Accreditation v8.1	Feb 1st	Jun 1st in 2 months

**Important!** In AccrediNet 3.0, when you apply for an accreditation and/or certification, you complete an **“Instrument”**. That is the tool used to collect your evidence of compliance to the Standards associated with the accreditation and/or certification.

## Notifications

Organization contacts will receive notifications noted by a number next to the **bell** in the top right corner of your screen when certain actions need their attention.



Access your Dashboard Notifications by selecting the “**bell**” icon. Notifications are dismissed individually by selecting a “**View Details**” link or all at once by selecting the “**Clear All**” link on the top right of the notifications screen.

<a href="#">Home</a> <a href="#">Profile</a> <a href="#">Demographics</a> <a href="#">Contacts</a> <a href="#">Structure</a> <a href="#">Applications</a> <a href="#">Certifications</a> <a href="#">Processes</a> <a href="#">Instruments</a> <a href="#">Documents</a> <a href="#">Issuer Information</a>		
Notifications		
Item		Timeframe
You have access to an Instrument Response <a href="#">VIEW DETAILS</a>		2 months ago
You've been assigned to an Instrument Response <a href="#">VIEW DETAILS</a>		2 months ago

In addition, email notifications are sent directly to you. System Email Samples:

<p><b>You've been assigned to the Instrument Response 'APP: Contact Center v1.0'</b></p> <hr/> <p><b>no-reply@urac.org</b> &lt;no-reply@urac.org&gt; To: clientemail@clientorg.com</p> <p>Dear URAC Client,</p> <p>You've been assigned to an Instrument Response.</p> <p>Subject: APP: Contact Center v1.0</p> <p>Open Date: 2021-03-08</p> <p>Close Date: 2021-06-10</p> <p><a href="#">Click here to access</a></p> <p>Sent from ARMATURE Fabric</p>
---

---

**A follow-up is requested on 'APP: Contact Center v1.0'**

---

**no-reply@urac.org** <no-reply@urac.org>  
To: clientemail@clientorg.com

Dear URAC Client,

A change request has been submitted for a survey/assessment response that requires your input.

Instrument name: APP: Contact Center v1.0

[Click here to access](#)

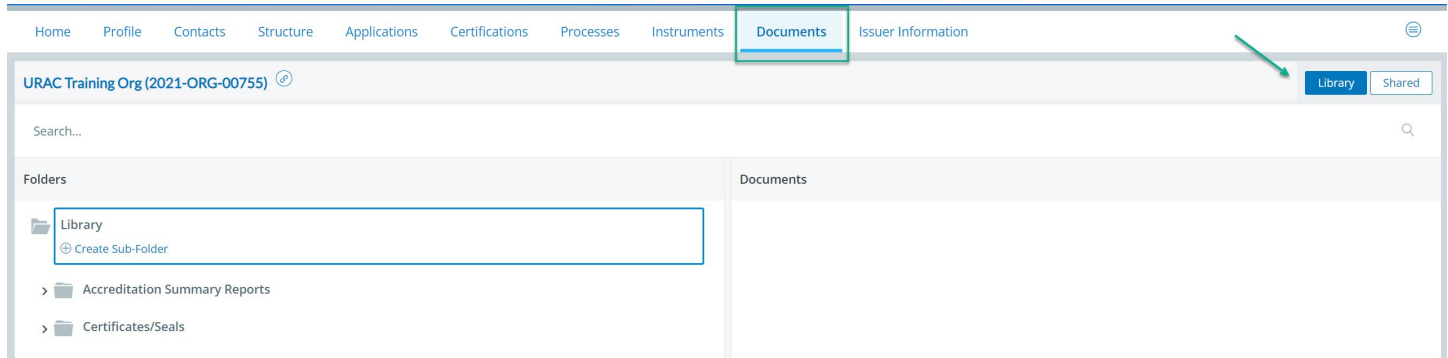
---

Sent from ARMATURE Fabric

**Important!** All system generated emails will be sent from “**no-reply@urac.org**”. Please request this email address be white-listed in your organization’s email system.

## Documents

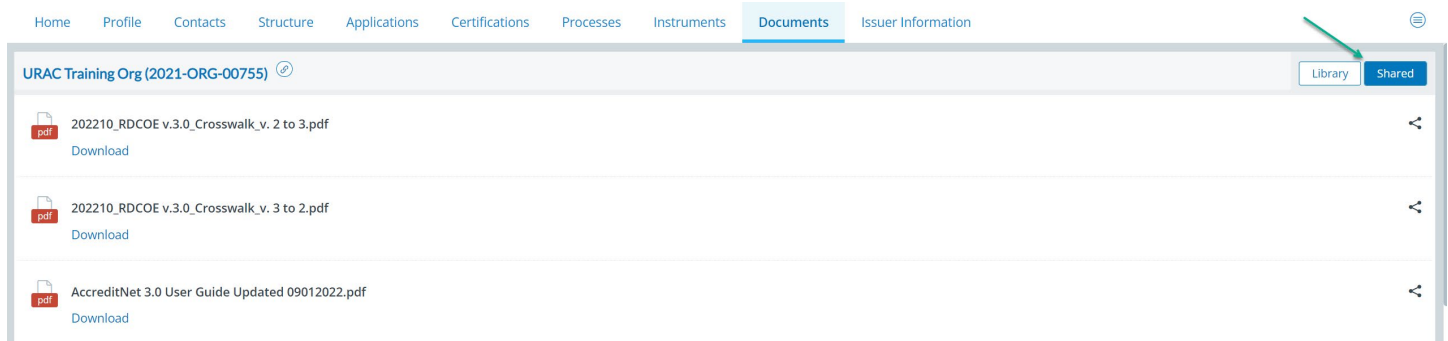
Certificates for accreditation and/or certification achievement are accessible via the “**Documents**” tab and filed in a folder within the “**Library**” section of the **Documents** screen.



## Resource Documents

The Program Guide and other resource documents have been uploaded to your organizations Documents folder for reference. In order to download these documents, navigate to the “**Documents**” tab on your Dashboard.

The screen will default to the “**Library**” tab within the “**Documents**” page. To download the Program Guide and Standards, select to the “**Shared**” tab:



**Important!!** Downloading and referencing the Program Guide is imperative to achieving a successful Accreditation or Certification.

## Contacts

The **Primary Organization Contact (POC)** should review the individuals listed via the Organization Home Screen or Dashboard under the “**Contacts**” tab. The individuals listed have access to all Organization information and can assist with Application Instrument completion.

Home	Profile	Contacts	Structure	Applications	Certifications	Processes	Instruments	Documents	Issuer Information	
URAC Training Org (2021-ORG-00755)										
<div>  Search          </div>										
Name	User Account	Type	Primary	Trusted						
Armature Admin	armature.dev+urac@gmail.com									
Margaret Frank	maggiecornett@verizon.net	Application User								
Olesya Lamb	olamb@urac.org	Application User								
Test Person	nhaggins@verizon.net	Application User								
test test2	shubham.patil@armaturecorp.com									
Margaret Weisner	maggieannc@gmail.com	Application POC, Organization POC								

The Organization POC is identified on the “**Contacts**” list with a green “**P**” under the “**Primary**” column. “**Trusted**” individuals are other Organization application users who can assist with Application Instrument completion and have access to **all** Organization information within the AccrediNet 3.0 system. Notify your Client Relations Manager (CRM) of any contacts that need to be added or deleted.

**Important!!** The Organization’s POC is responsible for notifying URAC of individuals that should be added or removed from the Organization’s Contact list.

## Application

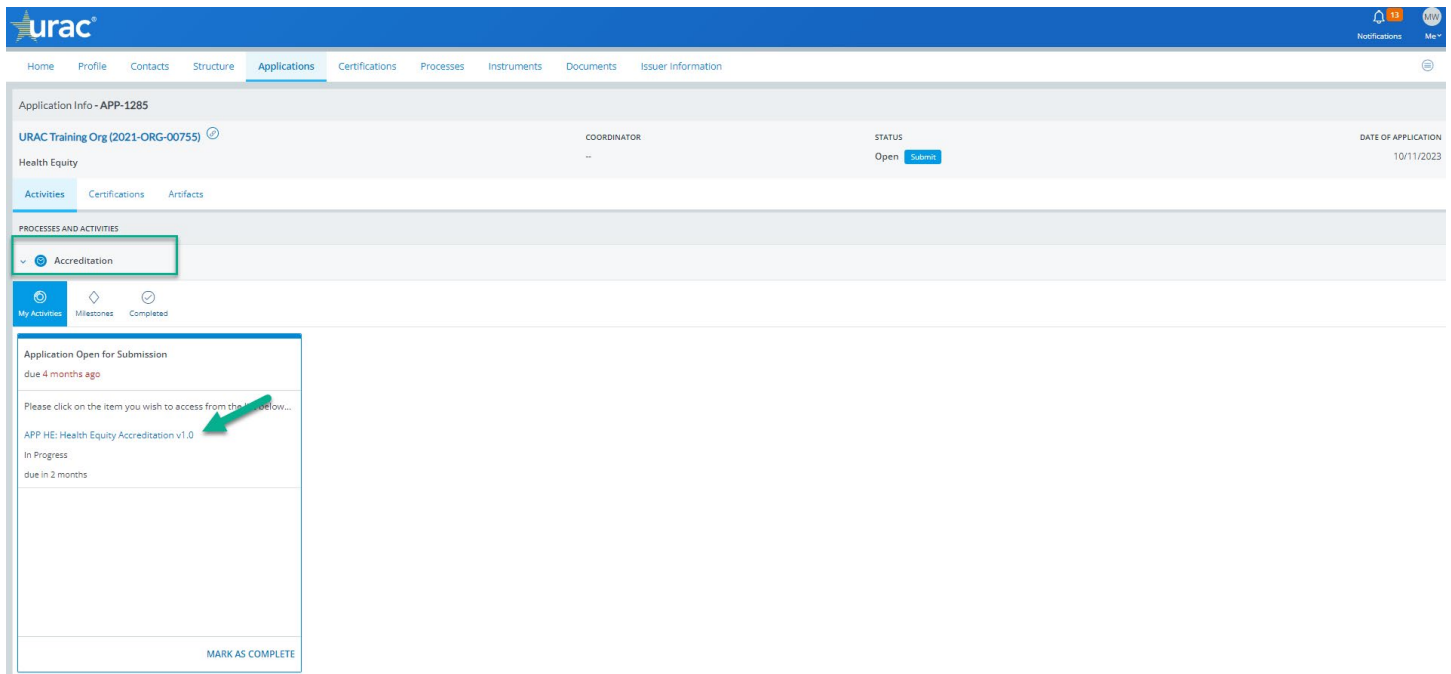
In AccrediNet 3.0 an **Application** encompasses all necessary activities to achieve accreditation/certification, including an **Instrument** used to submit documents and citations demonstrating compliance with URAC Standards and Elements of Performance.

The POC should review all information associated with the Accreditation or Certification being sought on the **Application Information** screen. Navigate to this screen by selectin the Application number listed in the Applications section of the Dashboard/Home Screen or using the “**Applications**” tab.

The **Application Information** screen defaults to the “**Activities**” tab and displays your Application number at the top of the page, along with your Organization name and the Accreditation of Certification program for which you are applying.

The Activities tab displays the current step within the Accreditation Process in a large box on the screen. Initially, the current Process step for the Accreditation Process will be “Application Open for Submission”. You can navigate to the Application Instrument by selecting the program name link within the box.





urac®

Home Profile Contacts Structure **Applications** Certifications Processes Instruments Documents Issuer Information

Application Info - APP-1285

URAC Training Org (2021-ORG-00755)

Health Equity

COORDINATOR --

STATUS Open [Submit](#)

DATE OF APPLICATION 10/11/2023

Activities Certifications Artifacts

PROCESSES AND ACTIVITIES

▼ Accreditation

My Activities Milestones Completed

Application Open for Submission  
due 4 months ago

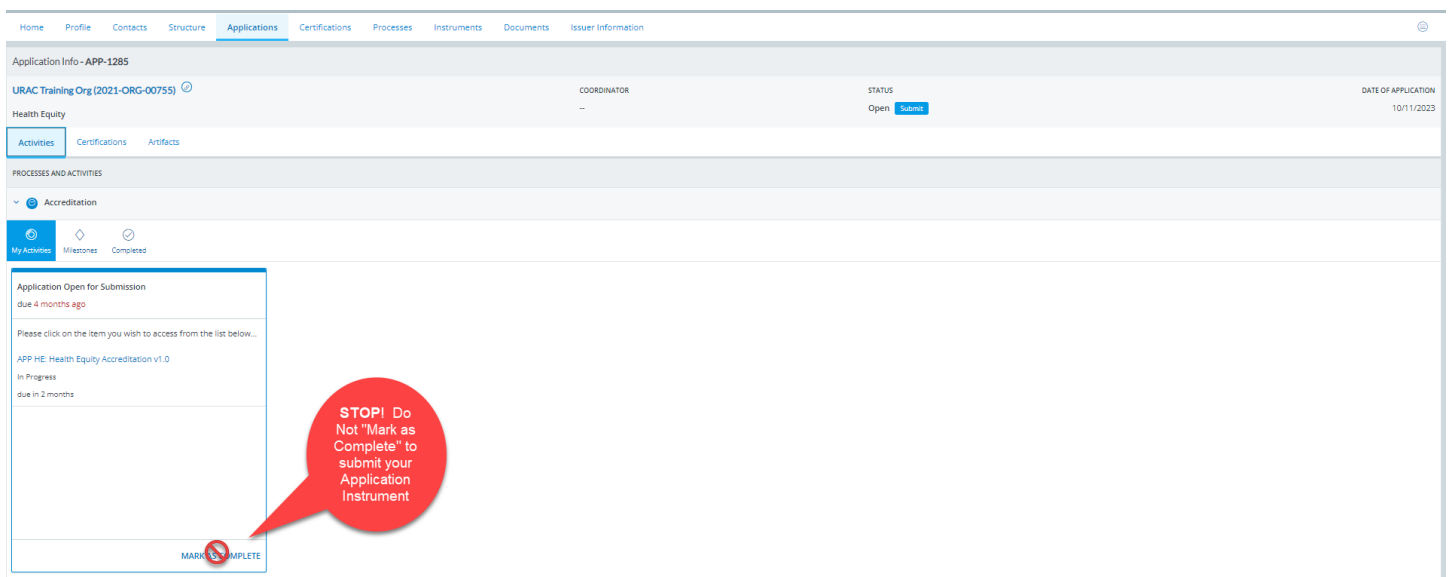
Please click on the item you wish to access from the list below...

APP HE: Health Equity Accreditation v1.0

In Progress  
due in 2 months

MARK AS COMPLETE

**Do NOT** select the “MARK AS COMPLETE” link at the bottom of the Process box. This process step is automatically completed for you when you “**Submit**” your Instrument.



Home Profile Contacts Structure **Applications** Certifications Processes Instruments Documents Issuer Information

Application Info - APP-1285

URAC Training Org (2021-ORG-00755)

Health Equity

COORDINATOR --

STATUS Open [Submit](#)

DATE OF APPLICATION 10/11/2023

Activities Certifications Artifacts

PROCESSES AND ACTIVITIES

▼ Accreditation

My Activities Milestones Completed

Application Open for Submission  
due 4 months ago

Please click on the item you wish to access from the list below...

APP HE: Health Equity Accreditation v1.0

In Progress  
due in 2 months

MARK AS COMPLETE

**STOP!** Do Not "Mark as Complete" to submit your Application Instrument

Selecting the “**Certifications**” tab on the **Application Information** screen identifies the version of accreditation or certification being, additional designations in scope (if applicable) and impacted sites.

The screenshot shows the 'Applications' tab selected in the top navigation bar. The main content area is titled 'Application Info - APP-1285'. Below this, the 'URAC Training Org (2021-ORG-00755)' is listed. The 'COORDINATOR' field is empty, and the 'STATUS' is 'Open' with a 'Submit' button. The 'DATE OF APPLICATION' is '10/11/2023'. The 'Health Equity' section has tabs for 'Activities', 'Certifications', and 'Artifacts'. The 'Certifications' tab is active, showing 'AVAILABLE CERTIFICATIONS'. Under 'APPLYING FOR', 'Health Equity 1.0 - INITIAL' is selected. Below this, a table lists 'SITES' with columns 'ITEM' and 'CERTIFICATIONS'. The table contains one entry: 'URAC Training Site 1' with address '1313 Mockingbird Lane', 'Cleveland, OH 12345', 'UNITED STATES', and 'Health Equity 1.0' in the 'CERTIFICATIONS' column. The 'ADDRESSES' section below the table states 'No sites included at this time'.

ITEM	CERTIFICATIONS
URAC Training Site 1 1313 Mockingbird Lane Cleveland, OH 12345 UNITED STATES	Health Equity 1.0

**Important!** Please review the list of applicable site names and locations for accuracy. Notify your Client Relations Manager (CRM) if this list is inaccurate.

## Processes

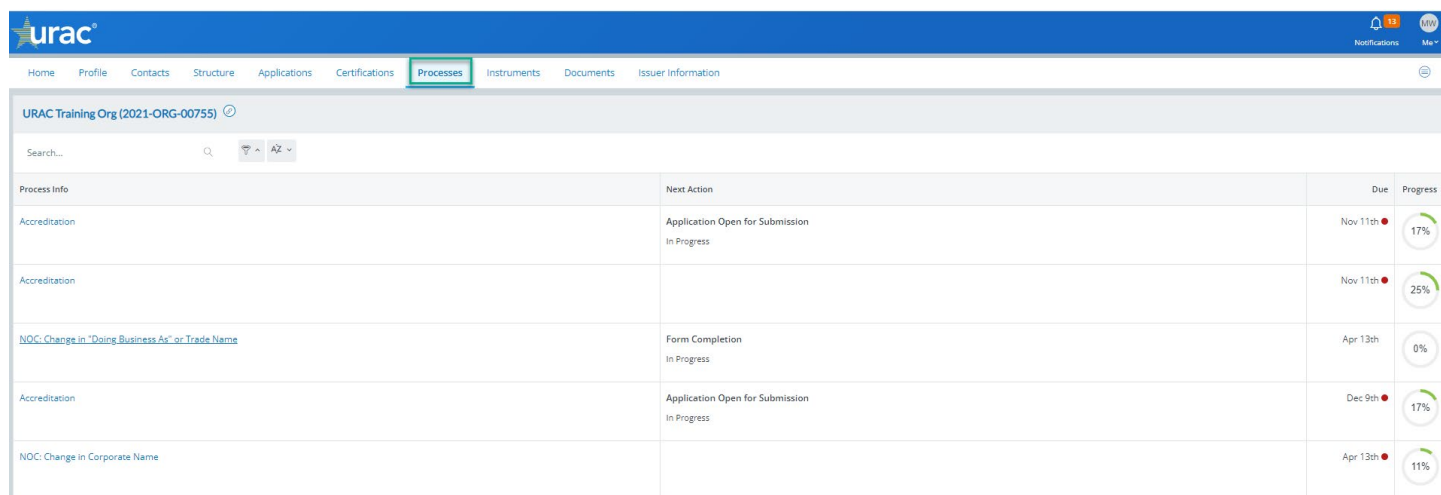
AccreditNet 3.0 uses a process engine to control the accreditation and NOC workflows. As a client, your need to interact with processes is minimal.

There are different types of processes:

- 1) **Accreditation Process** - You will NEVER need to interact with the Process steps. For the Accreditation Process the process step “Application Open for Submission” will automatically be marked complete when you “**Submit**” your Application Instrument.

In all cases the process will work in a similar manner. You can access a process from:

- From the Dashboard/Home screen “**Processes**” tab

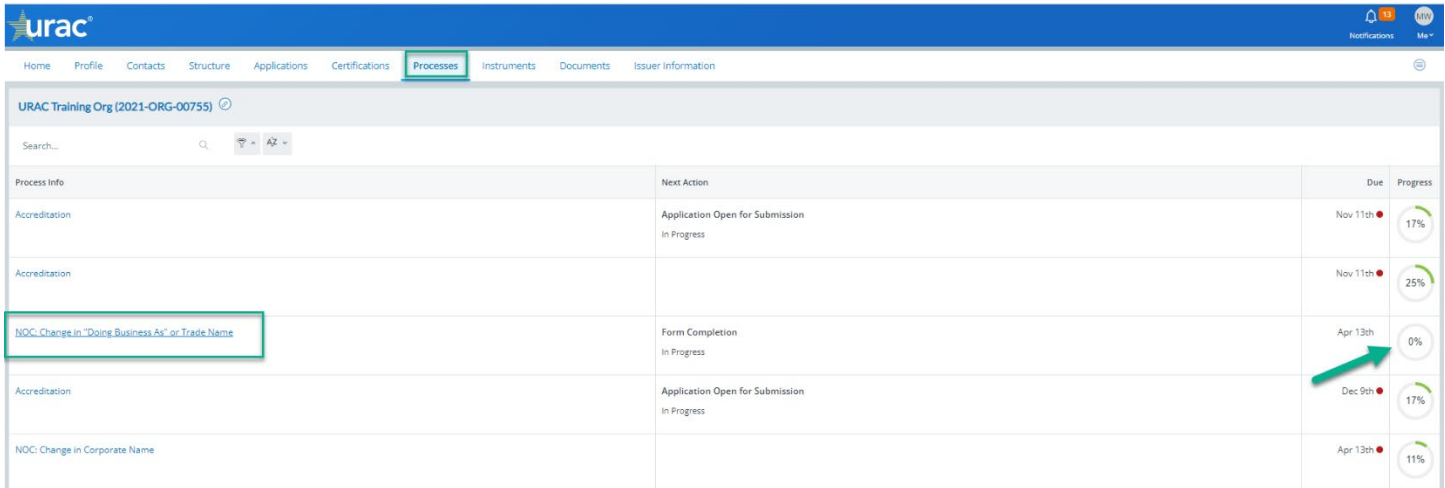


Process Info	Next Action	Due	Progress
Accreditation	Application Open for Submission In Progress	Nov 11th	17%
Accreditation		Nov 11th	25%
<a href="#">NOC Change in "Doing Business As" or Trade Name</a>	Form Completion In Progress	Apr 13th	0%
Accreditation	Application Open for Submission In Progress	Dec 9th	17%
<a href="#">NOC Change in Corporate Name</a>		Apr 13th	11%

After opening the “**Processes**” tab, you’ll see any process activity that’s visible to the organizational contact. When the Application POC “**Submits**” the application Instrument, the “**Application Submission**” process step will automatically be marked as Complete.

**IMPORTANT!** When you **Submit** the Application Instrument the “**Application Submission**” Process step will automatically update to Complete.

- 2) **Notice of Change (NOC) Process** – as discussed earlier, if you have not completed and submitted the associated information form, the NOC is listed as **“In Progress”**, but will display with a Progress of **“0%”** under the **“Processes”** tab.



Process Info	Next Action	Due	Progress
Accreditation	Application Open for Submission In Progress	Nov 11th	17%
Accreditation		Nov 11th	25%
<b>NOC Change in "Doing Business As" or Trade Name</b>	Form Completion In Progress	Apr 13th	0%
Accreditation	Application Open for Submission In Progress	Dec 9th	17%
NOC Change in Corporate Name		Apr 13th	11%

## Accreditation Milestones

This is a high-level view of a process to help users understand how far their application is in the process. Demonstrated below are the 2 ways you may view **Process Milestones**:

1. From the **Application Info** screen, select the “**Milestones**” tab on the **Accreditation Process**. The current “**In-Progress**” Milestone will display with a **blue** diamond.

The screenshot shows the 'Application Info - APP-1285' screen for 'URAC Training Org (2021-ORG-00755)'. The 'Applications' tab is selected in the top navigation bar. Under 'PROCESSES AND ACTIVITIES', the 'Accreditation' section is expanded, and the 'Milestones' sub-tab is active. A list of milestones is shown, with 'Application Open for Submission' marked as 'IN-PROGRESS' and highlighted with a blue diamond. Other milestones like 'Schedule Application' (COMPLETE) and 'Desktop Review' (NOT STARTED) are also listed.

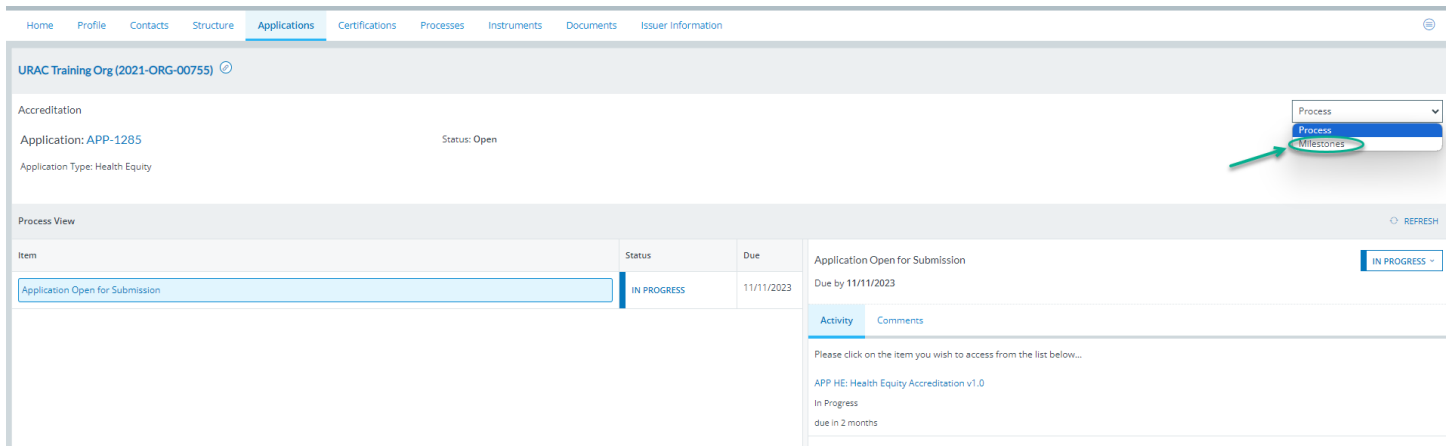
2. From the “**Process**” tab, select the active **Accreditation** process listed under the **Process Info** column.

The screenshot shows the 'Processes' tab in the application. A table lists various processes. The first row, 'Accreditation', is highlighted with a green arrow. The table columns are 'Process Info', 'Next Action', 'Due', and 'Progress'.

Process Info	Next Action	Due	Progress
Accreditation	Application Open for Submission In Progress	Nov 11th	17%
Accreditation		Nov 11th	25%
NOC: Change in "Doing Business As" or Trade Name	Form Completion In Progress	Apr 13th	0%
Accreditation	Application Open for Submission In Progress	Dec 9th	17%
NOC: Change in Corporate Name		Apr 13th	11%

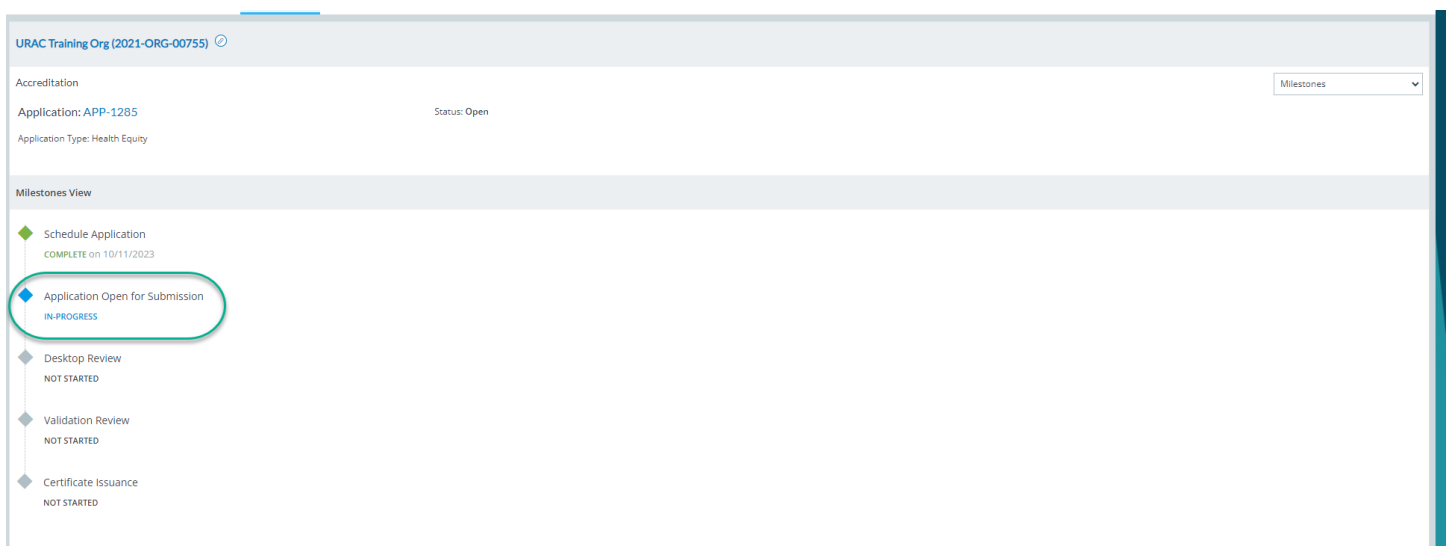
**Important!** If you are completing more than one Accreditation or Certification Application, this can be confusing as the **Process Info** list does not specify the Application being completed.

On the **Accreditation Process** screen, use the drop-down menu in the right upper corner and select **“Milestones”**.



The screenshot shows the 'URAC Training Org (2021-ORG-00755)' page. The 'Applications' tab is active. In the top right corner, a dropdown menu is open, showing 'Process' and 'Milestones'. A green arrow points to the 'Milestones' option. Below the dropdown, the 'Process View' section is visible, showing a table with one item: 'Application Open for Submission' with a status of 'IN PROGRESS' and a due date of '11/11/2023'. To the right of the table, there is a section for 'Activity' and 'Comments'.

The current **“In-Progress”** Milestone will display with a **blue** diamond.



The screenshot shows the 'URAC Training Org (2021-ORG-00755)' page. The 'Milestones' dropdown menu is selected. The 'Milestones View' section is visible, showing a list of milestones. The 'Application Open for Submission' milestone is highlighted with a blue diamond and a green circle, indicating it is 'IN-PROGRESS'. Other milestones include 'Schedule Application' (COMPLETE on 10/11/2023), 'Desktop Review' (NOT STARTED), 'Validation Review' (NOT STARTED), and 'Certificate Issuance' (NOT STARTED).

## Instruments

**Instruments** are used to capture question responses or criteria compliance documentation. This feature is used for the following activities:

- **Application Instrument** – for program, addendums, designations

Instruments can be accessed in various ways:

- **Dashboard > Scheduled Items**: Lists all incomplete **Instruments**.
- **Instruments** (top navigation tab): Lists of all instruments including the completed instruments for the organization.

The screenshot displays the 'Instruments' page for Application APP-1285. The page is divided into several sections: Overview, Progress, Instrument Workflow, Review Scoring Summary, and No Reviews. The 'Overview' section shows the organization as URAC Training Org (2021-ORG-00755) and the instrument as APP HE: Health Equity Accreditation v1.0. The 'Progress' section lists various sections with their completion percentages: Introduction (0%), General Questions [M] (36%), Table of Contents (0%), HE-OC 1 & 2 (41%), HE-OC 3 & 4 (6%), HE-PP 1: Program Overview and Quality Management (12%), HE-PP 2 & 3 (0%), HE-ESS 1: Communication and Language Services (0%), HE-ESS 2 & 3 (0%), and Thank You [M] (0%). A red arrow points to the 'Closes' date of 06/01/2024 in the 'Opens' and 'Closes' section. Another red arrow points to the 'Submit' button at the bottom right.

**Important!** Take note of the “**Closes**” date for the Instrument. Your initial submission of the Instrument must be completed and submitted by this date. The Application POC is the only person able to see and select the “**Submit**” button for the initial **Application Instrument** submission.

## Instrument Overview Page

- Instrument Overview: Organization name, Opens/Closes dates, and Status (A)
- Instrument Workflow: Displays the actions the Instrument has undergone to date (B)
- Review Scoring Summary: Displays information after reviewer has gone through scoring and calculated score (C)
- Instrument Detail
  - o Progress: List of pages in the instrument along with percentage of completion
  - o Documents: List all documents uploaded into instrument (E)
  - o Assignees: List users assigned to the instrument to access (F)

Users can navigate into the specific instrument pages using the page links on the right side of the screen (see **green** arrow).

APPLICATION APP-1443  
Instrument Overview

APP HCC: Health Contact Center Accreditation v6.0: CP + NCP

Summary Documents (E) Assignees (F) Reports

Overview (E) (F)

URAC's Prod Test Org (2022-ORG-00161)  
Washington DC, DC

Opens 01/16/2024 Closes 03/29/2024 (A) Status Submitted

Instrument Workflow (B)

Review Scoring Summary (C)

Progress (D)

Introduction  
General Questions [M]  
Table of Contents  
RM 1: Regulatory Compliance and Internal Controls  
RM 2: Information Systems  
RM 3: Business Continuity  
OPIN 1: Business Management  
OPIN 2: Staff Management  
OPIN 3: Clinical Leadership  
PMI 1: Quality Management Scope  
PMI 2: Quality Data Collection and Evaluation  
CPE 1: Protection of Consumer Information  
CPE 2: Consumer Safeguards and Communication  
RPT 1: Reporting Mandatory Performance Measures

Review Name Mandatory Missed Leading Indicators Met Instrument Score

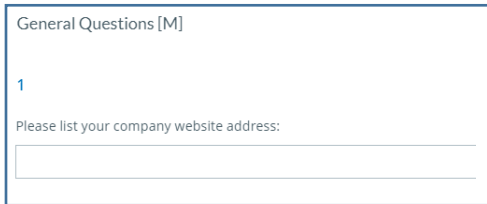
Review - - -%



## Instrument Question Types

All accreditation/certification instruments begin with an Introduction, followed by a page of **General Questions**. In addition, some programs may include additional program specific questions. The program standards are listed on separate pages. A final Attestation, the “**Thank You [M]**” page concludes the application/certification instruments. The following types of questions can be found within the Instrument:

1. Text box: An open text field for data entry

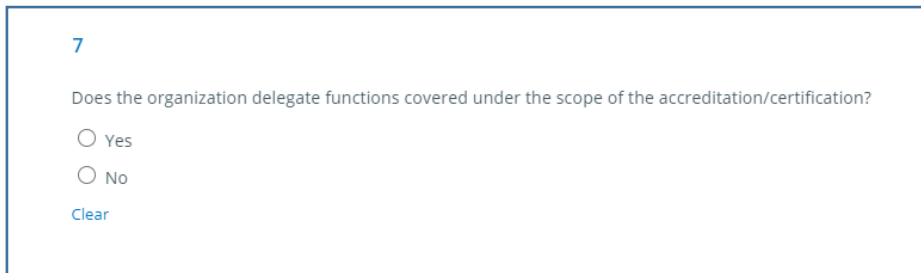


General Questions [M]

1

Please list your company website address:

2. Radio buttons: Used typically for yes/no questions. To use, simply select the icon next to the appropriate response:



7

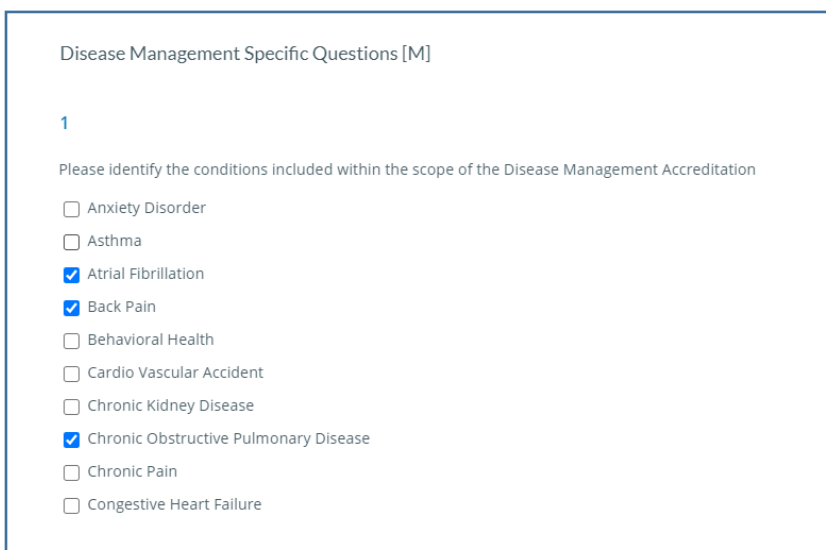
Does the organization delegate functions covered under the scope of the accreditation/certification?

☐ Yes

☐ No

[Clear](#)

3. Multi-select Buttons: Multiple options may be selected to provide the appropriate response to the question:



Disease Management Specific Questions [M]

1

Please identify the conditions included within the scope of the Disease Management Accreditation

- ☐ Anxiety Disorder
- ☐ Asthma
- ☒ Atrial Fibrillation
- ☒ Back Pain
- ☐ Behavioral Health
- ☐ Cardio Vascular Accident
- ☐ Chronic Kidney Disease
- ☒ Chronic Obstructive Pulmonary Disease
- ☐ Chronic Pain
- ☐ Congestive Heart Failure

- Supporting Documentation: These questions allow you to upload evidence in the form of policies, procedures, minutes, etc. that demonstrate your organization's compliance with the Standard or Element of Performance:

## HE-ESS 1-1.a Supporting Documentation

Link max of 3 documents per submission. If N/A, provide supporting documentation.

Click on "Add Row" to link a document.	Citation Required (indicate "included in document" or identify page number and section)
+ ADD ROW	

Select **"Add Row"** to enable the attach document function:

## HE-OC 1-1 Supporting Documentation

Link max of 3 documents per submission.

Click on "Add Row" to link a document.	Citation Required (indicate "included in document" or identify page number and section)
<p>Test Doc 3.pdf</p> <p>REMARKS</p> <p>Margaret Weisner - 10/11/2023 02:30:51 pm</p> <p>Download   Change   Hide Remarks</p>	Page 5, paragraph 3
<p>Upload Choose Existing</p>	
+ ADD ROW	

You can re-use an already-attached document or upload a document from file explorer. To attach additional documents, continue to use the **"Add Row"** function. In general, one or two documents can demonstrate compliance with an element. Only upload documents that specifically address compliance with the element. URAC will not review more than **three** documents per standard element prior to a "Request for Information" being sent.

Specify in the **"Citation (page number and section)"** text box the location within the attached document that the evidence is found. URAC will not accept or review any document that does not include a clear, specific citation.

**Important!** URAC will not review more than three documents per standard element prior to a "Request for Information" being sent.

**IMPORTANT!!**

**DO NOT** submit any protected health information (PHI) or individually identifiable health information (IIHI) in your Supporting Documentation. PHI/IIHI is any information about health status, provision of health care, or payment for health care that can be linked to a specific individual. Submitting PHI/IIHI to URAC is strictly prohibited.

## Instrument Navigation

Navigate between instrument pages using the “PREV.” and “NEXT” icons at the bottom of each page or by using the page links on the right side of the screen.

APP HE: Health Equity Accreditation v1.0  
URAC Training Org

Click on "Add Row" to link a document.

Document	Citation Required (Indicate "Included in document" or identify page number and section)
Test Doc 3.pdf REMARKS Margaret Weisner - 10/11/2023 02:30:51 pm Download   Change   Hide Remarks	Page 5, paragraph 3
Upload -or- Choose Existing	

HE-OC 1-1 Supporting Documentation  
Link max of 3 documents per submission.

HE-OC 1-2  
Expand Criteria | View Standard  
Maintaining Compliance  
The organization maintains compliance with all applicable jurisdictional laws, regulations and requirements not otherwise addressed by the program standards. [8]

HE-OC 1-2 Supporting Documentation

PREV. NEXT

SAVE Submit

Progress	Documents	Filters
0%	Introduction	
34%	General Questions [M]	
41%	Table of Contents	
6%	HE-OC 1 & 2	
6%	HE-OC 3 & 4	
12%	HE-PP 1: Program Overview and Quality Management	
0%	HE-PP 2 & 3	
0%	HE-ESS 1: Communication and Language Services	
0%	HE-ESS 2 & 3	
0%	Thank You [M]	

The system performs an automatic “Save” when moving between pages or when exiting the Instrument. You may wish to select “Save” however when uploading or attaching a number of documents to an Instrument page.

**Important!!** For the initial submission, only the Application POC can “Submit” the Instrument. All pages must be 100% complete before the “Submit” button is active.

## Request for Information (RFI)

Submitted instruments will go through URAC's **Desktop Review (DTR)** process with potential **Request for Information (RFI)**. When an **RFI** is issued, assignees will receive notification via email and within the **"Notifications"** screen accessible through the bell icon in the top right corner of the system banner.

- Feedback/Changes Requested: Indicates that there is feedback expected
- Orange Hazard Triangle: Indicates there is a question marked for follow-up on the page
- Review Scoring Summary: Shows the current score after the initial DTR and RFI rounds

Home Profile Contacts Structure Applications Certifications Processes Instruments Documents Issuer Information

APPLICATION APP-1286  
Instrument Overview

APP: Rare Disease Pharmacy Center of Excellence Certification v3.0

Summary Documents Assignees Reports

**FEEDBACK / CHANGES REQUESTED**

Overview			Progress
URAC Training Org (2021-ORG-00755) Washington, DC			Introduction
Opens 09/15/2022	Closes 01/02/2024	Coordinator -- Status Submitted	100% General Questions [M]
Instrument Workflow			100% RD-PM 1: Rare Disease Patient Management Program Overview
① -- Opened on			100% RD-PM 2: Rare Disease Assessments
Review Scoring Summary			100% RD-PM 3: Rare Disease Education and Support
Review Name	Mandatory Missed	Leading Indicators Met	100% RD-PM 4: Rare Disease Care Team Collaboration
Desktop Review	0	0	100% RD-PM 5: Program Evaluation and Review
		Instrument Score	100% Thank You [M]
		64.02%	

Navigate to the page where further clarification or feedback is requested.

Respond to each **Request for Information** by uploading a new or amended document. DO NOT delete any documents that were previously uploaded or linked to an element. Best practice is to append the name of the documents being added in response to the RFI with either the RFI round or the date of the upload, example: "Test Doc2\_RFI1\_03012024.pdf"

**Important!** You do not reply to the RFI, rather you need to upload additional documentation to demonstrate compliance. **DO NOT delete any documents that were previously uploaded or linked** even if the previously submitted document has been modified. Rather, rename the amended document, adding "RFI response" and the date modified and add to the Supporting Documentation section.

Showing all items but some require feedback / modification

Filter

## Supporting Documentation

On February 20th, 2021 at 12:11 PM, Maggie Cornett asked ...

"please cite specifically in the document where the response is found. "

Reply

On February 19th, 2021 at 03:38 PM, Maggie Cornett asked ...

Demonstrating Compliance with this Element of Performance (if not applicable, provide supporting documentation and Citation)

Please click on "Add Row" to select a document or upload another.

Citation



Test Doc 2.docx

Margaret Weisner - 02/19/2021 02:50:27 pm

[Download](#) | [Change](#) | [Show Remarks](#)

Citation information entered here



Test Doc 1.docx

Margaret Weisner - 02/19/2021 02:49:32 pm

page 16

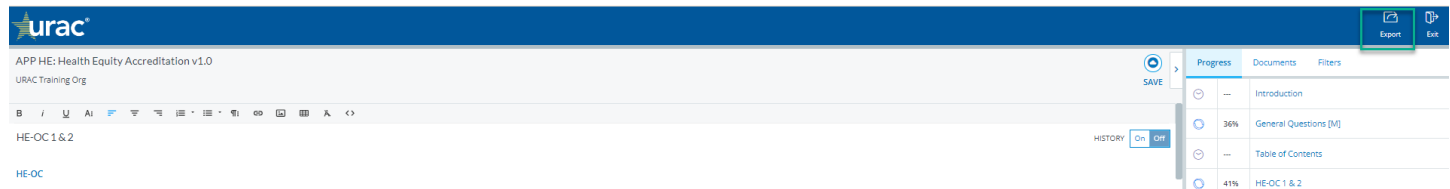
Once you have responded to each of the RFIs, select "**Submit Changes**" to proceed. This will notify the URAC Reviewer that you have responded and are ready to proceed with the accreditation/certification process.

**IMPORTANT!**

**Do NOT delete any previously uploaded documents when responding to an RFI.**

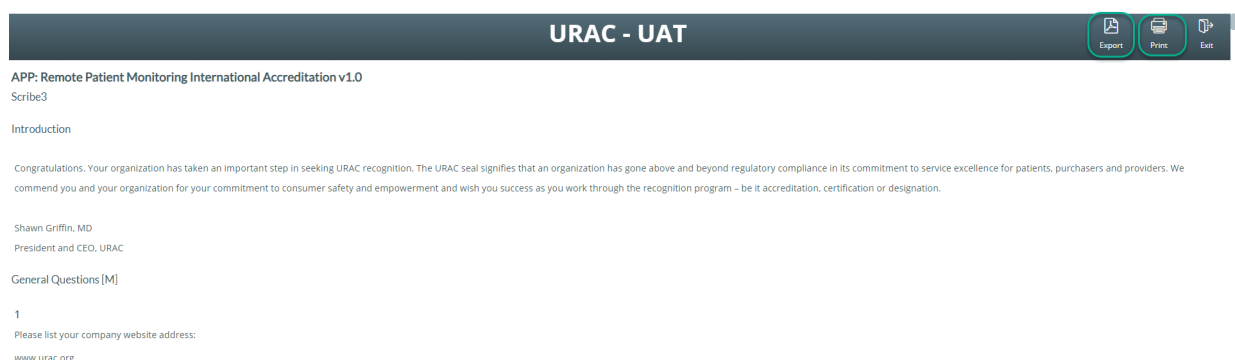
## Export

You can export details regarding your instrument submission from within your instrument by selecting the “**Export**” icon in the right upper corner of the banner:



Select the details you wish to include in the export:

The screenshot shows the 'Export/Print' dialog box. It has a blue header with the text 'Export/Print' and a close button. Below the header, there are several checkboxes: 'Include Comments' (checked), 'Include Documents' (checked), 'Include Findings' (checked), 'Include Issues' (unchecked), 'Show Full Criterion' (unchecked), 'Show Organization name' (checked), and 'Apply Filters' (unchecked). At the bottom of the dialog, there are two buttons: 'Export/Print' and 'Cancel'.



You will be able to export to .pdf or print the results for your records.

## Issuer information

Your organization can view all issuer information at any point in time. However, you may only add or archive issuer records during an active application. Any changes during non-application periods should be done by submitting a **“NOC: Change in Issuer Information [For HPL, DPL and HIM only]”**

Access Issuer Information from top navigation bar:

Home	Profile	Contacts	Structure	Applications	Certifications	Processes	Instruments	Documents	<b>Issuer Information</b>	
------	---------	----------	-----------	--------------	----------------	-----------	-------------	-----------	---------------------------	--

Issuer Information					
Search...	Q	⌵ ^	AZ		
Program Name	State	Market Type	Product Type	Created Date	
Health Plan	District of Columbia	Commercial	Point-of-Sale	11/09/2022	

Manage Issuer Information

Program Name

Dental Plan

Product Name

Dental Plan ABC

State

Alaska

Market Type

Commercial

Product Type

Exclusive Provider Organization

Type of Insurance Risk

Self-Insured

HIOS Issuer ID

2233ee

NAIC Company Code

343431 dd

NAIC Group Code

45454fff

What is the number of covered lives within this product offering in the last fiscal year?

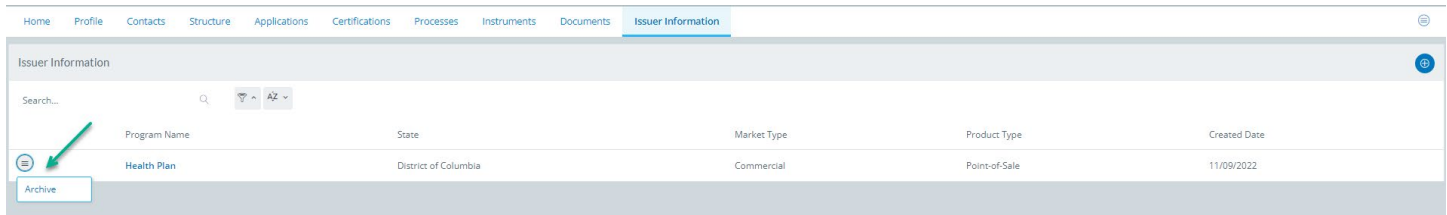
3

Save

Cancel

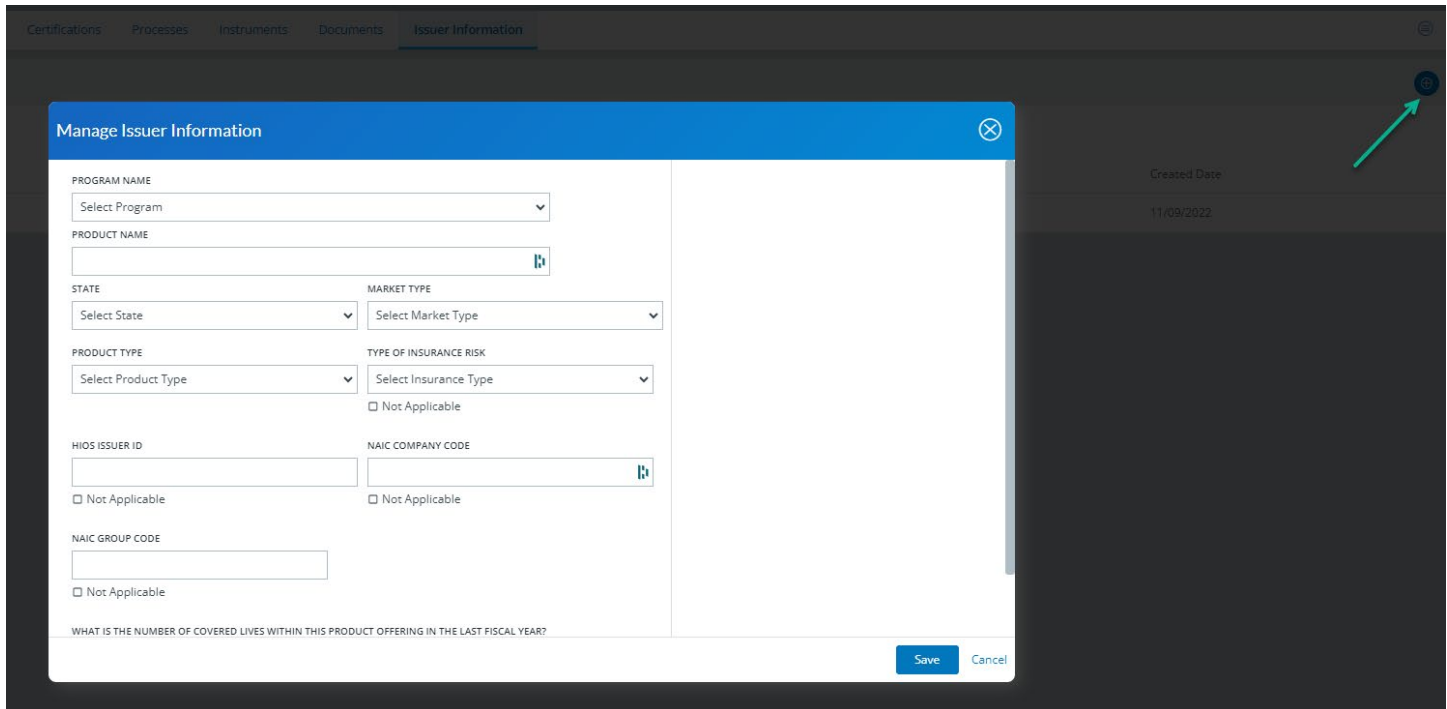
If **Issuer Information** has changed, you will need to archive the previous record and add a new one.

- To Archive outdated information, select the menu “≡” icon to the left of the Program Name.



The screenshot shows the 'Issuer Information' section of a web application. At the top, there is a navigation bar with tabs: Home, Profile, Contacts, Structure, Applications, Certifications, Processes, Instruments, Documents, and Issuer Information. Below the navigation bar is a search bar and a table. The table has columns: Program Name, State, Market Type, Product Type, and Created Date. The first row of data shows 'Health Plan', 'District of Columbia', 'Commercial', 'Point-of-Sale', and '11/09/2022'. To the left of the 'Health Plan' entry, there is a menu icon (three horizontal lines) and an 'Archive' button. A green arrow points to the menu icon.

- To add new Issuer information, select the “+” sign in the right upper corner of the screen and complete the form.



The screenshot shows the 'Manage Issuer Information' form. The form has a blue header with the title 'Manage Issuer Information' and a close button (X). The form contains several fields: PROGRAM NAME (a dropdown menu), PRODUCT NAME (a text field), STATE (a dropdown menu), MARKET TYPE (a dropdown menu), PRODUCT TYPE (a dropdown menu), TYPE OF INSURANCE RISK (a dropdown menu), HIOS ISSUER ID (a text field), NAIC COMPANY CODE (a text field), NAIC GROUP CODE (a text field), and a checkbox for 'Not Applicable'. At the bottom, there is a question: 'WHAT IS THE NUMBER OF COVERED LIVES WITHIN THIS PRODUCT OFFERING IN THE LAST FISCAL YEAR?'. There are 'Save' and 'Cancel' buttons at the bottom right. A green arrow points to a '+' icon in the top right corner of the screen.

**Important!** If the Issuer Information remains unchanged, you do not need to add or modify record.



## Accreditation/Certification

You can navigate to certification record via:

- Dashboard: Click on certificate type name
- Top navigation: Certification - Click on certificate type name

Certifications

☒ Show Active Only

<b>HUM010001</b> expires 12/01/2026 Health Utilization Management 7.3	Active
--	--------

When a record is selected via the certificate type name, the detail page will display current stats, historical decisions, sites and the seal (html code) to be copied and used on the organization's website.

[Home](#)
[Profile](#)
[Contacts](#)
[Structure](#)
[Applications](#)
[Certifications](#)
[Processes](#)
[Instruments](#)
[Documents](#)
[Issuer Information](#)

**HUM010001 - Health Utilization Management 7.3 - ABC Company**
ACTIVE

ISSUED	EFFECTIVE	EXPIRATION
12/11/2023	12/01/2023	12/01/2026
STATUS	APPLICATION	
Granted	--	

Site

ABC Center  
 12 Center Way  
 Greenbelt, MD 20770  
 UNITED STATES

Effective Date  
 12/01/2023

Expiration Date  
 12/01/2026

Embed Certification Seal HTML

```

<div>
  <a href="https://urac.fabricust.armaturecorp.net/directory/#/accreditation/HUM010001/info">
    
  </a>
  <div>Health Utilization Management</div>
  <div>12/01/2026</div>
</div>

```

Copy to Clipboard

C/N	DECISION	EFFECTIVE	EXPIRATION	SOURCE
HUM010001	Approve Accreditation Program Full Accreditation	12/01/2023	12/01/2026	HUM007468
HUM010001	Add Site	12/01/2023		

## Seals

URAC-accredited or certified organizations should display a valid, dated URAC Accreditation or Certification Seal applicable to your program status on your company website. The seal contains a hyperlink to your listing on the URAC Directory of Accredited Organizations or the URAC Directory of Certified Organizations web page as appropriate. With a “click-to-verify” Accreditation or Certification Seal, you ensure that anyone visiting your website can easily recognize and verify your status.

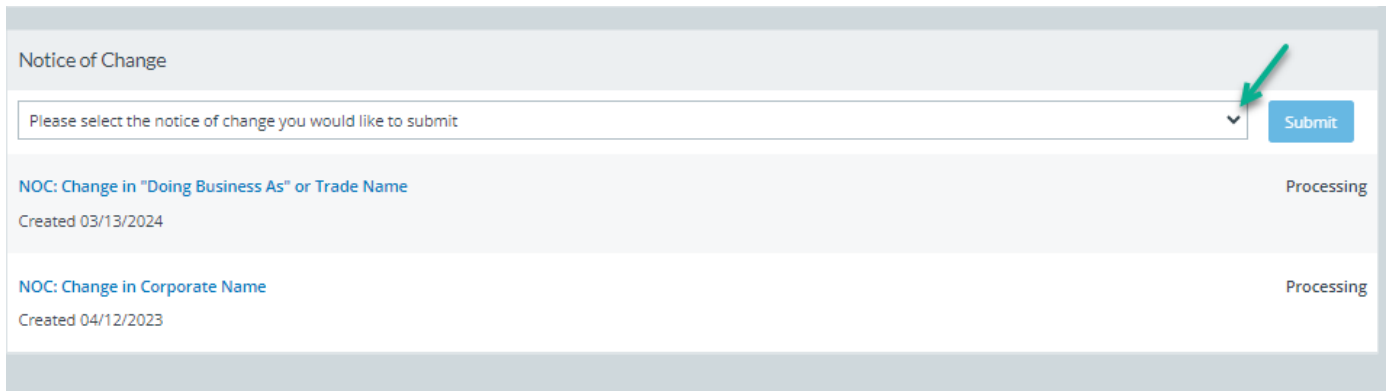


Located on the Certification Record, AccreditedNet 3.0 provides a more versatile format for seal generation. The HTML code provided includes the URAC seal image, the program for which you have been accredited/certified, the expiration date of the accreditation/certification and an embedded link back to your organization’s directory information. ***Copy the code provided to Notepad and save it as an HTML file. Provide the file to your website administrator for incorporation on your website.***

## Notice of Change (NOC)

To start an NOC:

- Select the type of NOC that you wish to submit from the drop-down menu in the “**Notice of Change**” section on your Dashboard/Home screen.



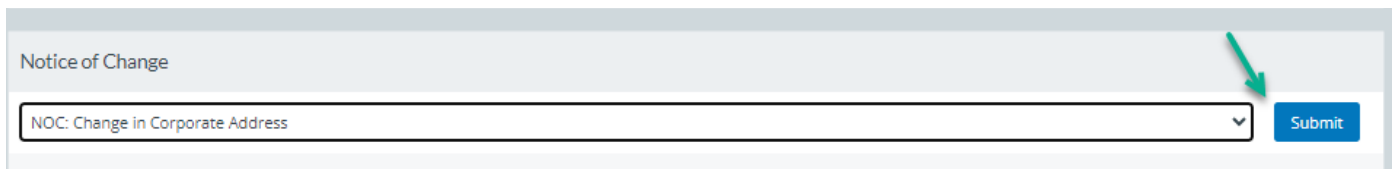
Notice of Change

Please select the notice of change you would like to submit

**Submit**

NOC: Change in "Doing Business As" or Trade Name Created 03/13/2024	Processing
NOC: Change in Corporate Name Created 04/12/2023	Processing

- Click on the “**Submit**” button.




Notice of Change

NOC: Change in Corporate Address

**Submit**

- After selecting the “**Submit**” button:
  1. The form that generates outlines the information that needs to be collected in order to process the NOC.
  2. Depending upon the type of NOC, you may be asked to provide the impacted Application Number.
  3. Once the information is entered, you can choose to “**Save**”, “**Submit**” or “**Abandon**” this form.

**Edit Form** 


**NOC: Change in Corporate Address**

Previous Corporate Address

Main Address Line 1:

Address Line 2:

City: State: Zip Code:


 Select an option...

New Corporate Address


Main Address Line 1:


Address Line 2:

City: State: Zip Code:

 Select an option...

Is this address included as a site under the scope of accreditation(s)?

 Select an option...

 **Submit**

[Save for later](#) | [Abandon](#)

Once **“Submit”** is selected, the NOC instrument will be available to URAC staff for processing.

**Important!** If you do not have access to the information required to complete the form, you can select “**Save**”, however the NOC will not be available for URAC staff to process until the information is add and the form is submitted. NOCs that have yet to be submitted are still listed as “In Progress”, but will display with a Progress of “0%” in the **Processes** tab.

URAC Training Org (2021-ORG-00755)				
Search...				
Process Info	Next Action	Due	Progress	
Accreditation	Application Open for Submission In Progress	Nov 11th	17%	
Accreditation		Nov 11th	25%	
NOC: Change in "Doing Business As" or Trade Name	Form Completion In Progress	Apr 13th	0%	
Accreditation	Application Open for Submission In Progress	Dec 9th	17%	
NOC: Change in Corporate Address	Complete Form In Progress	Apr 28th	0%	
NOC: Change in Corporate Name		Apr 13th	11%	

## Important Contact Information

### Support

<https://www.urac.org/contact/>

### AccreditNet Helpdesk

The helpdesk is available Monday through Friday from 8 a.m. to 5 p.m. Eastern Time. To request assistance:

Phone: (202) 216-9010 (option 6)

Email: [accreditnet@urac.org](mailto:accreditnet@urac.org)

### Client Services Inquiries

Phone: (202) 326-3942

Email: [clientrelations@urac.org](mailto:clientrelations@urac.org)

### Accreditation Seal Use Approval, Press Release Approval and All Marketing-Related Inquiries

Phone: (202) 326-3968

Email: [marketing@urac.org](mailto:marketing@urac.org)