

ParityManager™ User Guide Version 1.0

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## **Access and Authorization**

### **Creating User Accounts**

URAC grants access to ParityManager<sup>™</sup> based on the information provided by the organization's primary point of contact in the Client Intake Form.

After a user's account has been created in ParityManager<sup>™</sup>, an auto-generated email notification is sent to the user's email address.



Each new user must set a password for their account by using the <u>password reset link</u>. New users may also access the link by clicking the **Forgot Your Password** link located on the ParityManager<sup>™</sup> login page.

urac:			Login
	Login		
	E-Mail Address		
	Password		
		Login Forgot Your Password?	
		SSO Login	

#### **User Types**

**User**: An individual associated with an organization which has a license to use ParityManager<sup>TM</sup>.

**Team Lead**: The primary point of contact for the ParityManager<sup>™</sup> account for URAC. The team lead has the same capabilities as a regular user, but also has permissions to copy product lines, edit product line name on the **Dashboard** page, invite and remove team users, and delete product lines not associated with an accreditation submission, if applicable. Only the team lead can submit the completed accreditation application to URAC for review.



# Logging In

There are two options to gain access to ParityManager™:

- Password authentication
- Single Sign On (SSO) using your company's authentication platform

#### **Password Authentication**

#### To login with your email address and password:

urac:	Login
Login E-Mail Address 1 Password 2 3 Login Forgot Your Password? SSO Login	

Navigate to the ParityManager<sup>™</sup> website: <u>https://paritymanager.urac.org/login</u>

- 1. Enter the email address associated with your ParityManager<sup>™</sup> user account.
- 2. Enter the password that you have set for your user account.
- 3. Click Login.

**Note:** In accordance with URAC's policy, user accounts become automatically disabled after 90 days of inactivity. Users can request to reenable their inactive user account at any point by contacting <u>accreditnet@urac.org</u> or 202-216-9010 (Option 6), Monday-Friday, 8am-5pm ET.

#### Logging In (with SSO option)

Some companies prefer to use their own Microsoft authentication server to handle user access. URAC has its own SSO implementation using SAML (Security Assertion Markup Language). If you would like to set up your company to control user access with SSO, please contact <u>accreditnet@urac.org</u> to set up the authentication. (This will require coordination with your IT support team during the initial setup phase only).

**Note:** While your IT team can control who has access to the system, it will still require URAC to assign your users to specific teams and products within the system.

Once setup is complete, a user should click the SSO Login button (shown below) to access ParityManager™.



Login		
E-Mail Address		
Password		]
	Login Forgot Your Password?	
	SSO Login	

This will redirect the user to URAC's SSO login. The only information that must be provided is the email address that you use to login on your company network, which is typically your work email address. Once you click **SSO Login**, if properly authenticated already on your company account, you will be redirected back to ParityManager<sup>™</sup> and logged in automatically.

Welcome to the URAC SSO Portal. Type your company email below to gain access to the URAC suite of web applications assigned to your organization.				
	name@company.com	Login		

#### **Team Access**

Parity compliance is a team effort for the different health plans. Access and permissions are assigned at the team level. Every product line has one team that owns the product and has full access to all parity sections for that product. Reporting features and access are assigned separately.

If it becomes necessary to grant access to portions of a product line (referred to as a "carve out" plan), additional teams can be assigned to that product line by URAC with restricted access. See <u>Assigning Additional Access</u>.

## Assigning Additional Access (Input/Output, Standards, Classification/Benefit Category)

Sometimes it is necessary for a user to have limited access to a product line. An example of this might be where part of your product line is serviced by a 3<sup>rd</sup> party.

URAC support can assist you with assigning limited access to product lines within ParityManager<sup>™</sup>. You can restrict access in a few key areas: sections, classifications, and benefit categories.

## Settings

When clicking your name in the upper-right corner of the application, select Your Settings and you will be presented with a view like the screenshot below. The first tab is basic account information, including the password reset button on the left-hand side of the screen.



**Note:** If your company is using SSO, the password reset functionality will not work for you as it is not tied directly to your company account login.

User Settings			
Account Information	Product Lines	Teams	Data Sharing
Account Information	First Name	Olesya	
Password	Last Name	Lamb	
	E-Mail Address	olamb@urac.org	
		Update	
Account Information Password	First Name Last Name E-Mail Address	Olesya Lamb olamb@urac.org Update	

### **Account Information**

The Account Information tab allows you to view the first name, last name and email address associated with your user account.

To update the name for your user account, edit the First Name and Last Name fields as needed.

**Note:** The email address field is grayed out. A user does not have permissions to change their own email address. Please contact your Client Relations Manager with any changes in the email address for a user account.

#### **Product Lines**

The Product Lines tab allows you to modify what data is available for selection within a given product line. There are sections within ParityManager<sup>™</sup> where URAC provided default selections as examples of the type of content expected. These examples can be used when making selections, or you can provide your own custom items.

There are instances where you might want to hide the default list so only your custom uploaded data is made available within your product line(s).

#### To hide the default list items:

1. On the **User Settings** page, select the **Product Lines** tab.

User Settings			
Account Information	Product Lines	Teams	Data Sharing
The ParityManager™ system provides some default prefer to only work from a custom list built by your 1	list items where it is expected for the applicant to p team, you may hide these items from your product lin	rovide NQTLs, factors, sources, evidentia ne here.	ary standards or operation measures. If you
NOTE: If you make selections from the default list, the	hose selections will not be hidden when activating t	nis feature. Only default items that were	not selected are hidden.
	Select Product	~	

2. Select the appropriate product line from the drop-down list and options will appear below.



User Settings				
Account Information	Product Lines	Teams	Data Sharing	
The ParityManager™ system provides some default list items where it is expected for the applicant to provide NQTLs, factors, sources, evidentiary standards or operation measures. If you prefer to only work from a custom list built by your team, you may hide these items from your product line have				
NOTE: If you make selections from the default list, th	ose selections will not be hidden when activating th	nis feature. Only default items that were n	ot selected are hidden.	
	Select Product Select Product	~		
	Demo Commercial Product Line			

Account Information	Product Lines	Teams	Data Sharing
Ianager™ system provides some defa	ult list items where it is expected for the a	pplicant to provide NQTLs, factors, sources, evidentia	ary standards or operation measures
u make selections from the default list	, those selections will not be hidden wher	ur product line nere. 1 activating this feature. Only default items that were	e not selected are hidden.
	, those selections with hor be maden when	i deatachig and reache. Only deidate reins that were	not beteeted are maden.
	Demo Commercial Produc	ct Line 🗸 🗸	
	Data Type	Default List	
	NQTLs	Show 🔾 Hide	
	NQTLs Benefits	<ul><li>Show Hide</li><li>Show Hide</li></ul>	
	NQTLs Benefits Factors	<ul> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> </ul>	
	NQTLs Benefits Factors Sources	<ul> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> </ul>	
	NQTLs Benefits Factors Sources Evidentiary Standards	<ul> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> </ul>	
	NQTLs Benefits Factors Sources Evidentiary Standards Operation Measures	<ul> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> <li>Show</li> <li>Hide</li> </ul>	

3. For each data type and section, select show or hide from the **Default List** column.

Settings				
Account Information	Product Lines		Teams	Data Sharing
e ParityManager™ system provides some defau	It list items where it is expected for the a	pplicant to provide NQTLs,	, factors, sources, evidenti	ary standards or operation measures. If you
efer to only work from a custom list built by your <b>DTE:</b> If you make selections from the default list,	<ul> <li>team, you may hide these items from yo those selections will not be hidden when</li> </ul>	our product line here. n activating this feature. On	nly default items that wer	e not selected are hidden.
	Demo Commercial Produ	ict Line	~	
	Demo Commercial Produ	ict Line Default List	~ _	
	Demo Commercial Produ Data Type NQTLs	Default List Show O Hide		
	Demo Commercial Produ Data Type NQTLs Benefits	Default List O Show O Hide O Show O Hide		
	Demo Commercial Produ Data Type NQTLs Benefits Factors	Default List O Show O Hide O Show O Hide O Show O Hide	]	
	Demo Commercial Produ Data Type NQTLs Benefits Factors Sources	Default List Show Hide Show Hide Show Hide Show Hide Show Hide		
	Demo Commercial Produ Data Type NQTLs Benefits Factors Sources Evidentiary Standards	Default List Show Hide Show Hide Show Hide Show Hide Show Hide Show Hide		



**Note:** If you select **Hide** on a default list, but you or another user had made a selection from the default list, all default items will be hidden except the selected items.

#### Teams

The **Teams** tab allows you to view a list of users for each team with which your access is associated in ParityManager<sup>™</sup>. User accounts with team lead permissions can use this tab to add or remove users for their team.

#### To view team users:

1. Click the **Teams** tab in the **User Settings** navigation pane.

urac				Testing User 🔻
User Settings				
Accour	it Information	Product Lines	Teams	Data Sharing
	Name	Ow	ner	
	URAC Testing	Na	than Byloff	
		Users		
	Name	Email	Active	
	Nathan Byloff		Yes	
	Testing User		Yes	
	Demo User		No	

A list of users for the team with which you are associated will display.

The **Active** column will show whether the user's account is currently active, based on the user's last login date in the past 90 days.

2. If you are associated with more than one team, select the team for which you want to view users. Most users will have only one team.



#### To add or remove users as a team lead:

User Settings				1		
Account Inform	mation	Product Lines	Te	ams		Data Sharing
	Name		Owner			
	Parity Demo Team		Olesya Lamb			
	Team 2		Nathan Byloff			
2	URAC Testing		Olesya Lamb			
		Invitation	0	4		
	3 Email Address	Invitation	5	Send Invitation		
		_				
		5 Users				
	Name	Email		Active		
	Olesya Lamb	olamb@urac.org		Yes	_	
	Demo User	it@urac.org		Yes 6		

- 1. Click the **Teams** tab in the **User Settings** navigation pane.
- 2. Select the team you are managing from the table. Most users will have only one team.
- 3. Type the email address of the user to add to your team.
- 4. Click Send Invitation.
- 5. Users who have accepted the invitation will be active members on your team and appear in this table.
- 6. Click the trash can icon next to the user's name to remove them from your team. This does not prohibit the user from logging into the system, but revokes all access to any product lines owned by your team.

#### **Data Sharing**

If you would like to ensure all products assigned to a group together work from the same list of NQTLs, you can use the **Data Sharing** tab under **User Settings**, shown below.

User Settings			
Account Information	Product Lines	Teams	Data Sharing
Some product lines can be grouped together into a "Product of that will be shared with all products within the specified group to the state of the s	Group". In order to make sure the produ ip.	ct lines within a group are using the same	lists of data, you can create a custom list below
Product Lines		Add NQTE	nere Add
<ul> <li>Sample Commercial Product Line for PM Report Generation</li> </ul>	NQTL		
OL Test Commercial Accreditation Application - Redesigned Standards	Concurrent Review		×
	Outlier Management		X



- 1. If you have products grouped together, they will be listed in the dropdown box on the left-hand side.
- 2. After choosing a product group from the dropdown, below you will see a list of product lines within the group that will be impacted by NQTL additions/removals as well as a list of custom NQTLs previously added to this group.
- 3. Add an NQTL by typing it in the box on the right-hand side of the screen and click Add.
- 4. To remove a custom NQTL, click the red "X" on the appropriate row.

**Note:** If you remove a custom NQTL that has been used by any of the products within the group, all responses associated with that NQTL will also be removed.

#### Dashboard

The product dashboard is the home screen for ParityManager<sup>TM</sup>. It is where you find a list of product lines available to your login as well as some basic information about your accreditation application (if applicable).

Dashboard						
Welcome to ParityManager <sup>TM</sup> , URAC's enterprise software solution created to promote mental health and substance use disorder parity compliance. This platform was designed for health plans, third-party administrators, and other organizations to build, implement, and manage an effective parity compliance program. Whether you are using this tool as part of your accreditation application or as a stand-alone tool to assist you with parity compliance – we commend you and your organization for your commitment to realizing the importance of parity. For those of you pursuing accreditation, we wish you success as you work through your application.						
Shawn Griffin, MD President and CEO, URAC						
Product Name	Team	Complete				
Demo Commercial Product Line	Demo Team	No				

## **Products Table**

Dashboard						
Welcome to ParityManager <sup>TM</sup> , URAC's enterprise software solution created to promote mental health and substance use disorder parity compliance. This platform was designed for health plans, third-party administrators, and other organizations to build, implement, and manage an effective parity compliance program. Whether you are using this tool as part of your accreditation application or as a stand-alone tool to assist you with parity compliance – we commend you and your organization for your commitment to realizing the importance of parity. For those of you pursuing accreditation, we wish you success as you work through your application. Shawn Griffin, MD President and CEO, URAC						
Product Name	Team	Complete				
Sample Medicaid Product Line for PM Report Generation	Parity Demo Team	No				
Sample Commercial Product Line for PM Report Generation	Parity Demo Team	No				
OL Test Product Line for PM Report Testing	Parity Demo Team	No				
OL Test Commercial Accreditation Application - Redesigned Standards	Parity Demo Team	No				
Demo Commercial Product Line	Parity Demo Team	No				
Demo Commercial Product Line 3.24.24	Parity Demo Team	No				
OL Test Product Line 2.22.24	Parity Demo Team	No				
OL Factors Section Testing 2.29.24	Parity Demo Team	No				



When you open any given product line by selecting it on the **Dashboard**, the navigation is segmented into sections identified by the tabs across the top of the screen.

Plan Information NQTLs Fa	actors Measures Comparative Analysis Findings & Conclusions Standard
Provide the plan name, annual	enrollment, and SERFF tracking numbers with approval dates, if applica
Name	
Demo Commercial	l Product Line
Annual Enrollment	
	Annual Date
SERFF #	mm/dd/yyyy
Provide a summary description of your pro	duct line.

#### Accreditation

For accreditation applicants, there will be a **Submit for Review** button displayed on the **Dashboard** for users with team lead permissions. It will be disabled until all product lines associated with your application are marked as **Yes** in the **Complete** column in the product table on the **Dashboard**.

Dashboard					
Welcome to ParityManager <sup>IM</sup> , URAC's enterprise software solution created third-party administrators, and other organizations to build, implement, and application or as a stand-alone tool to assist you with parity compliance – v pursuing accreditation, we wish you success as you work through your apple Shawn Griffin, MD	to promote mental heal I manage an effective pa ve commend you and yo jcation.	th and substai rity complianc ur organization	nce use disorder parity co ce program. Whether you n for your commitment to	mpliance. This platform wa are using this tool as part o realizing the importance of	as designed for health plans, of your accreditation ( parity. For those of you
President and CEO, URAC					
Product Name	Team	Complete	Product	Details	Manage
Sample Medicaid Product Line for PM Report Generation	Parity Demo Team	No	Product Name	OL Test Commercial	Accreditation Application -
Sample Commercial Product Line for PM Report Generation	Parity Demo Team	No		Redesigned Standar	ds
OL Test Product Line for PM Report Testing	Parity Demo Team	No	Plan Type	Commercial	
OL Test Commercial Accreditation Application - Redesigned Standards	Parity Demo Team	No	Team	Parity Demo Team	
Demo Commercial Product Line	Parity Demo Team	No	Lead Contact	Olesya Lamb (olamb	@urac.org)
Demo Commercial Product Line 3.24.24	Parity Demo Team	No			Parity Home
OL Test Product Line 2.22.24	Parity Demo Team	No	Accreditation	Application	
OL Factors Section Testing 2.29.24	Parity Demo Team	No	The submit button wi	Il become available once al	l product lines required for the
Copy of Sample Medicaid Product Line for PM Report Generation	Parity Demo Team	No	current phase have be once the review is cor	en completed. The URAC in nplete for next step instruc	review team will be in contact tions.
			Application #: MHP-1		
					Submit for Review



### Classifications

Product lines can be formatted to process commercial or Medicaid plans. There are a few sections and questionnaires that have their answers segmented by classification.

Commercial	Medicaid
Classification	Classification
n Network Inpatient	
Out of Network Inpatient	Inpatient
In Network Outpatient - Other	Outpatient - Other
In Network Outpatient - Office Based	
Out of Network Outpatient - Other	Outpatient - Office Based
Out of Network Outpatient - Office Based	Emergency Benefits
Emergency Benefits	
Prescription Drugs	Prescription Drugs

### **Benefit Categories**

On top of the segmentation by benefit classifications, product lines are also segmented into benefit categories: Mental Health, Substance Use Disorder and Medical/Surgical. Teams can assign limited access to data entered for specific categories.

**Note:** In most cases, Mental Health and Substance Use Disorder will be combined into one category. They can be segmented into separate categories but must be done before any data entry has begun.

#### **Product Lines**

Product lines are the different insurance products that an organization will be submitting to ParityManager<sup>™</sup> to track for parity purposes. The product line name will appear on all ParityManager<sup>™</sup> reports.

#### **Plan Types**

Every product line is assigned a plan type. Commercial and Medicaid are the two plan types currently available in ParityManager<sup>™</sup>. The benefit classifications for a commercial plan are different from those for a Medicaid plan. During accreditation, the Complete column can be helpful as a quick identifier on product lines still requiring input before submitting for accreditation.

#### **Basic Plan Updates**

The user with team lead permissions can perform these actions from the home screen on a product line:

- Update the name of the product line
- Make a copy of the product line
- Delete the product line



## To update the name of a product line:

1. On the **Dashboard**, click the product line that you would like to rename.

2. The **Product Details** and the **Manage** tabs will display to the right of the selected product line. Select the **Manage** tab.

ashboard /elcome to ParityManager™, URAC's enter iird-party administrators, and other organiz oplication or as a stand-alone tool to assist ursuing accreditation, we wish you success	prise software solution created to promote ations to build, implement, and manage an you with parity compliance – we commenc as you work through your application.	mental health and substa effective parity complianc d you and your organizatio	nce use disorder parity c ce program. Whether you n for your commitment to	ompliance. This platform v u are using this tool as par o realizing the importance	vas designed for health plans t of your accreditation of parity. For those of you
Shawn Griffin, MD President and CEO, URAC					
Product Name	Team	Complete	Produc	t Details	Manage
Demo Commercial Product Line	Demo Team	No	Product Name	Demo Commercial	Product Line
			Plan Type	Commercial	
			Team	Demo Team	
			Lead Contact	Olesya Lamb (olam	b@urac.org)
					Parity Hor

3. Make the necessary updates in the **Update Product Line Name** field.



Dashboard				
Welcome to ParityManager™, URAC's enterprise third-party administrators, and other organization application or as a stand-alone tool to assist you pursuing accreditation, we wish you success as y	e software solution created to promote ns to build, implement, and manage an with parity compliance – we commenc ou work through your application.	mental health and substan effective parity complianc d you and your organization	nce use disorder parity compliance. This platform wa e program. Whether you are using this tool as part of n for your commitment to realizing the importance of	as designed for health plans, of your accreditation f parity. For those of you
Shawn Griffin, MD				
President and CEO, URAC				
	_			
Product Name	Team	Complete	Product Details	Manage
Demo Commercial Product Line	Demo Team	No	Team Lead Onl	y
			Demo Commercial Product Line	Update
			Copy of Demo Commercial Product Line Make a duplicate of currently selected product line	Copy Product
			Delete Product Permanently remove a product line	

#### 4. Click Update.

Welcome to ParityManager™, URAC's enterpris third-party administrators, and other organizatic application or as a stand-alone tool to assist you pursuing accreditation, we wish you success as	e software solution created to promot ins to build, implement, and manage a i with parity compliance – we commer you work through your application.	e mental health and substa in effective parity complian id you and your organizatic	nce use disorder parity compliance. This platforn e program. Whether you are using this tool as p n for your commitment to realizing the importanc	a was designed for health plans, art of your accreditation e of parity. For those of you
Shawn Griffin, MD President and CEO, URAC				
Product Name	Team	Complete	Product Details	Manage
Demo Commercial Product Line	Demo Team	No	Team Lead (	Dnly
			Demo Commercial Product Line Update product line name	Updat
			Copy of Demo Commercial Product Line Make a duplicate of currently selected product line	Copy Produc
			Delete Product	

#### To copy a product line:

To help save time on manual data entry, a copy feature is available for use. An organization can complete a product line and then use it as a starting point for other product lines. This copy feature allows the team lead to duplicate all previous information and documents associated with an existing product line into a new one.

**Note:** Because Commercial plans and Medicaid plans have different benefit classifications, duplicating information and documents from one product line into another one is only possible if both product lines have the same plan type.

1. On the **Dashboard** page, click the product line that you would like to duplicate.



Dashboard		
Welcome to ParityManager™, URAC's enterprise third-party administrators, and other organization application or as a stand-alone tool to assist you pursuing accreditation, we wish you success as yo	software solution created to promote s to build, implement, and manage an vith parity compliance – we commenc u work through your application.	mental health and substa n effective parity complianc d you and your organizatio
Shawn Griffin, MD		
President and CEO, URAC		
Product Name	Team	Complete
Demo Commercial Product Line	Demo Team	No

2. The **Product Details** and the **Manage** tabs will display to the right of the selected product line. Select the **Manage** tab.

Dashboard						
Welcome to ParityManager <sup>™</sup> , URAC's enterprise software solution created to promote mental health and substance use disorder parity compliance. This platform was designed for health plans, third-party administrators, and other organizations to build, implement, and manage an effective parity compliance program. Whether you are using this tool as part of your accreditation application or as a stand-alone tool to assist you with parity compliance – we commend you and your organization for your commitment to realizing the importance of parity. For those of you pursuing accreditation, we wish you success as you work through your application.						
Shawn Griffin, MD President and CEO, URAC						
Product Name	Team	Complete	Product Details	Manage		
Demo Commercial Product Line	Demo Team	No	Team Lead Onl	y		
			Demo Commercial Product Line	Update		
			Update product line name			
			Copy of Demo Commercial Product Line	Copy Product		
			Make a duplicate of currently selected product line			
			Delete Product			
			Permanently remove a product line			

3. Rename the product line to be duplicated, if desired, and click **Copy Product**.



Dashboard				
Welcome to ParityManager <sup>TM</sup> , URAC's enterpris third-party administrators, and other organizatic application or as a stand-alone tool to assist you pursuing accreditation, we wish you success as y	e software solution created to promote ns to build, implement, and manage an with parity compliance – we commenc you work through your application.	mental health and substa effective parity complian I you and your organizatic	nce use disorder parity compliance. This platform v ce program. Whether you are using this tool as par In for your commitment to realizing the importance	was designed for health plans, rt of your accreditation of parity. For those of you
Shawn Griffin, MD President and CEO, URAC				
Product Name	Team	Complete	Product Details	Manage
Demo Commercial Product Line	Demo Team	No	Team Lead Or	nly
			Demo Commercial Product Line Update product line name	Update
			Copy of Demo Commercial Product Line Make a duplicate of currently selected product line	Copy Product
			Delete Product Permanently remove a product line	

4. In the pop-up window, click the **Confirm Duplication** button.

Dashboard			
Welcome to ParityManager <sup>TM</sup> , URAC's enterprise software t third-party administrators, and other organizations to build, application or as a stand-alone tool to assist you with parity pursuing accreditation, we wish you success as you work th	solution created to promote mental health and substance use disorder pa implement, and manage an effective parity compliance program. Whether compliance – we commend you and your organization for your commitm rough your application.	rity compliance. This platform was o er you are using this tool as part of y ent to realizing the importance of pa	designed for health plans, /our accreditation arity. For those of you
Shawn Griffin, MD			
President and CEO, URAC			
Product Name Demo Commercial Product Line	(!)	t Details	Manage
	Duplicate Product Line?		
	Creating a copy of product: Demo Commercial Product Line Are you sure?	Product Line	Update
		mercial Product Line	Copy Product
	Confirm Duplication Cancel	ently selected product line	
	Permanently remo	ove a product line	

5. Reload the page. A copy of the selected product line will display in the products table on the **Dashboard**.

Dashboard			
Welcome to ParityManager™, URAC's enterprise software third-party administrators, and other organizations to built application or as a stand-alone tool to assist you with pari pursuing accreditation, we wish you success as you work t	solution created to promote mer d, implement, and manage an effe ty compliance – we commend you hrough your application.	ntal health and substa ective parity complian u and your organizatio	unce use disorder parity compliance. This platform was designed for health plans, ce program. Whether you are using this tool as part of your accreditation on for your commitment to realizing the importance of parity. For those of you
Shawn Griffin, MD			
President and CEO, URAC			
Product Name	Team	Complete	
Demo Commercial Product Line	Demo Team	No	-
Copy of Demo Commercial Product Line	Demo Team	No	



## To delete a product line:

**Note:** Product lines associated with an accreditation application cannot be deleted.

1. On the **Dashboard** page, click the product line that you would like to delete.

Dashboard							
Welcome to ParityManager <sup>™</sup> , URAC's enterprise software solution created to promote mental health and substance use disorder parity compliance. This platform was designed for health plans, third-party administrators, and other organizations to build, implement, and manage an effective parity compliance program. Whether you are using this tool as part of your accreditation application or as a stand-alone tool to assist you with parity compliance – we commend you and your organization for your commitment to realizing the importance of parity. For those of you pursuing accreditation, we wish you success as you work through your application.							
Shawn Griffin, MD							
President and CEO, URAC							
Product Name	Team	Complete					
Demo Commercial Product Line	Demo Team	No					

2. The **Product Details** and the **Manage** tabs will display to the right of the selected product line. Select the **Manage** tab.

Dashboard					
Welcome to ParityManager™, URAC's enterprise third-party administrators, and other organization application or as a stand-alone tool to assist you pursuing accreditation, we wish you success as yo	software solution created to promote s to build, implement, and manage ar with parity compliance – we commen u work through your application.	nental health and substant effective parity complianc d you and your organization	nce use disorder parity compliance. This platform was de ce program. Whether you are using this tool as part of yo n for your commitment to realizing the importance of par	esigned for hea ur accreditatio ity. For those c	alth plans, on of you
Shawn Griffin, MD					
President and CEO, URAC					
Product Name	Team	Complete	Product Details	Manage	
Demo Commercial Product Line	Demo Team	No	Team Lead Only		
			Demo Commercial Product Line		Update
			Update product line name		
			Copy of Demo Commercial Product Line	Cor	py Product
			Make a duplicate of currently selected product line		
			Delete Product		

3. Click the **Delete Product** button.



Welcome to ParityManager™, URAC's enterpris third-party administrators, and other organizatio application or as a stand-alone tool to assist you pursuing accreditation, we wish you success as y	e software solution created to promote ns to build, implement, and manage ar with parity compliance – we comment ou work through your application.	mental health and subst n effective parity compliar d you and your organization	ance use disorder parity compliance. This platform wa ice program. Whether you are using this tool as part c on for your commitment to realizing the importance of	s designed for health plans, of your accreditation parity. For those of you	
Shawn Griffin, MD President and CEO, URAC					
Product Name	Team	Complete	Product Details	Manage	
Demo Commercial Product Line	Demo Team	No	Team Lead Only		
			Demo Commercial Product Line Update product line name	Updat	
			Copy of Demo Commercial Product Line Make a duplicate of currently selected product line	Copy Produc	
			Delete Product		

4. In the pop-up window, click **Confirm Delete**.

Dashboard			
Welcome to ParityManager <sup>™,</sup> URAC's enterprise software third-party administrators, and other organizations to build application or as a stand-alone tool to assist you with parit pursuing accreditation, we wish you success as you work to	solution created to promote mental health and substance use disorder pa I, implement, and manage an effective parity compliance program. Whethe ty compliance – we commend you and your organization for your commitment hrough your application.	rity compliance. This platform was desig er you are using this tool as part of your a ent to realizing the importance of parity.	ned for health plans, accreditation For those of you
Shawn Griffin, MD			
President and CEO, URAC			
Product Name	(!)	t Details	Manage
Demo Commercial Product Line		Team Lead Only	
Copy of Demo Commercial Product Line	Delete Product Line?		
	Deleting product: Copy of Demo Commercial Product Line Are you sure?	mercial Product Line	Update
		mo Commercial Product Line	Copy Product
	Confirm Delete Cancel	antly selected product line	
	Permanently remo	a product line	

## **Document Manager**

There are several locations throughout ParityManager<sup>™</sup> where documentation, along with citations, is required.

When you click on the button for adding documentation within your product line, a pop-up window for the Document Manager will display.



Document Manager	×
Type to Search Clear	
ACA - Part 4.pdf	
Blank Test Document_OL.docx Demo File.docx	Choose a file or drag it here.
Health Policy Brief.pdf	Do NOT upload any documents with personally identifiable health information!
Implementation-of-the-Mental-Health-Parity-and- Addiction-Equity-Act-in-Medicaid-and-CHIP.pdf	
MHP - Self-Compliance Tool.pdf	
Parity-Une-Pager.pdf	
	Close

The Document Manager allows to access a list of documents uploaded for a given product line.

Each document is required to be uploaded only once but can be associated with any response, where applicable, for a given product line.

#### To attach a document:

- 1. Access the Document Manager by navigating to the appropriate section within the product line.
  - If attaching documentation within the **Standards** section, navigate to the appropriate Standards response page and click the **Supporting Documentation** button.



	Plan Information NQTLs	Factors Measu	res Comparative Anal	lysis	Findings & Conclusions	Standards	
3.1 Parity Compliance Pr	3.2 Parity Compliance Activities	3.3 Addressing Pr	rity Violations 3.4 Pani	ity Compli	ance Program Evaluation	Standard 1: I Standard 2: P	Business Management Personnel
	3.3 Addres	sing Parity Vio	lations			Standard 3: P	Parity Compliance
he organization monito onstitutes parity violatio 'he organization:	rs, tracks and addresses parity violations [M]	. As part of this proce	ss, the organization identifi	fies clear	criteria as to what	Standard 4: / Limits Standard 5: I	Annual/Lifetime Dollar Benefit Identification and
L leenthes what constitu 1. Implements a process 1. Monitor, detect, and le ii. Respond to detected iii. Take action to investit v. Design and impleme c, Manages complaints/ Supporting Documents	unes a party violation. to: lentify potential parity violations. or identified potential parity violations. at a aptotniki parity violation. at activities to achieve parity compliance grievances related to parity compliance.					Standard 6: f Standard 7: ( Limitations ( Standard 8: 1 Quantitative (NQTLs) Standard 9: ( Written*	inancial Requirements Quantitative Treatment QTLs) Requirements dentification of Non- Treatment Limitations Comparative Analysis "A:
Document	Citation					Standard 10: Operation* Standard 11: Necessity Cr Standard 12: Reasons Standard 13:	Comparative Analysis Ta Disclosure of Medical Iteria Disclosure of Denial Disclosure of Parity

 If attaching documentation for a Questionnaire within the Standards section, navigate to the Standards section and the appropriate Questionnaire and then click the Manage Documents button.

	Plan Information	NQTLs	Factors	Measures	Comparative Analys	is Finding	s & Conclusions	Standards
	Standard				Questionnaire			Standard 1: Business Management
					* - ✓ - Minimum do	Document requin	uirement below ement complete	Standard 3: Parity Compliance
	c	UESTION				т	(PE	Standard 4: Annual/Lifetime Dollar
						Annual	Lifetime	Standard 5: Benefit Identification and
Does the Organizati benefits?	ion apply an aggregate [TYPE] d	ollar limits t	o either men	tal health or si	ibstance use disorder	O Yes O No	O Yes No	Classification Standard 6: Financial Requirements
Does the Organizati on medical/surgical	ion apply an aggregate [TYPE] d benefits?	ollar limit to	at least two	thirds of the p	rojected expenditures	• Yes • No *		Standard 7: Quantitative Treatment Limitations (QTLs) Requirements
Does the Organizati benefits and medica	ion apply the same aggregate [T al/surgical benefits?	YPE] dollar	limit to ment	al health/subst	ance use disorder	O Yes O No		Standard & Identification of Non- Quantitative Treatment Limitations
Does the Organizati that is not lower tha	ion apply an aggregate (TYPE) d an the aggregate (TYPE) dollar U	ollar limit to mit applied	mental heal to medical/se	th/substance u irgical benefits	se disorder benefits ?			(NOTLS) Standard 9: Comparative Analysis "As Written"
Does the Organization apply an aggregate [TYPE] dollar limit to more than one-third but less than two-thirds of medical/burgical benefits and apply an aggregate lifetime dollar limit to montal health or Substance Use benefits that is not lower than the average limit applied to medical/surgical benefits?							Standard 10: Comparative Analysis "In Operation"	
Please upload doct including an Actua	uments supporting this response rial Analysis as applicable.	l.	Manaş	e Documents	I			Standard 11: Disclosure of Medical Necessity Criteria Standard 12: Disclosure of Denial Reasons
Document	Type Citation							Standard 13: Disclosure of Parity Compliance Analysis

• If attaching documentation with an NQTL response instead of entering the information manually in the interface, where available, navigate to the appropriate section or sub-section, click the down arrow to the right of the **Save** button and select **Add Document**. A screenshot with an example is shown below.



Plan Information	NQTLs F	actors	Measures	Comparativ	e Analysis	Findi	ngs & Concl	usions	Standards		
1. Identify F	actors		2. Define Fac	tors	3	. Sources	& Evidentia	ry Standard	s		
For each NQTL, select applicable factor(s) and provid whether and how the NQTL is applied to a particular	e appropriate benefit.	sources a	nd applicable c	quantitative or	qualitative	evidentia	ry standard	(s) that refle	ect an adequat	e basis for deterr	mining
Classification n Network Outpatient - Office Based ▼								1ental Heal	th/Substance I	Jse Medical/	/Surgical
NQTL Formulary Design		Apply to	o all Factors								
Geographic Restrictions		Factor									
Medical Necessity Criteria		Recent	medical cost e	scalation							
Network Tier Design		Safety	risks								
Pharmacy – Medical Necessity		Valid D	EA or Controll	ed Substance	Certificate o	or accepta	able substitu	ute			
Process for Assessment of New Technologies											
Provider Credentialing									Add Sou	rce here	/
Retrospective Review		Sourc	e								
Service Limitations	•	A cert effect	tain number/typ iveness studies	pe of recogniz and clinical t	ed medical l rials), and p	literature oublished	and profess research stu	ional standa Idies.	ards (including	comparative	
		Accre	ditation standa	rds for quality	/ assurance.						
		Claim episo	s data show th des of care.	at 25 percent	of patients	stayed lo	nger than tł	ne median le	ength of stay f	or acute hospital	
		Coeffi	cient of variatio	on exceeding	D.8.						
				-							

2. In the Document Manager pop-up window, drag and drop or click the area shaded in green to navigate for files on your computer to upload.

Document Manager		×
Type to Search	Clear	
File		$\sqrt{\sqrt{1}}$
Demo File.docx MHPAEA-FAQs.pdf		
Parity-One-Pager.pdf		Choose a file or drag it here. Do NOT upload any documents with personally identifiable health information!
		Demo File.docx
		Citation required Attach File
		Ctose

3. Browse to the appropriate file on your computer and click **Open**.



Open						>
$\leftarrow$ $\rightarrow$ $\checkmark$ $\uparrow$ $\blacksquare$ > This PC >	Desktop			<ul><li>・ ひ Search Deskto</li></ul>	p	,
Organize • New folder					目・ロ	1 0
1011	Name	Status	Date modified	Туре	Size	
Y Quick access	Demo File	$\odot$	2/10/2024 6:04 PM	Microsoft Word D	oc	12 K
OneDrive - URAC	5 Microsoft Teams classic	0	10/13/2023 9:01 AM	Shortcut		3 K
URAC	5 Microsoft Teams-URAC-PC1VQ28K	$\odot$	8/14/2023 10:30 AM	Shortcut		3 K
This DC	Test Files	0	3/22/2024 3:23 PM	File folder		
3D Objects						
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Documente						
Downloads						
Music						
Pictures						
Videos						
B Windows (C)						
C mildens (c)						
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				Open	Car	cel

Once uploaded, each document will display under **File** on the left side of the Document Manager popup window.

Document Manager	×
Type to Search	lear
File Demo File,docx	
MHPAEA-FAQs.pdf Parity-One-Pager.pdf	<b>Choose a file</b> or drag it here. Do NOT upload any documents with personally identifiable health information!
	Demo File.docx
	Citation required Attach File
	Close

4. Under **File**, click the document that you would like to attach.



Document Manager		>
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Demo Hie.docx MHPAEA-FAQs.pdf Parity-One-Pager.pdf		<b>Choose a file</b> or drag it here. Do NOT upload any documents with personally identifiable health information!
	(hanne	MHPAEA-FAQs.pdf
	Cita	Attach File
		Close

# 5. Enter the citation details into the **Citation Required** field.

Document Manager		×
Type to Search	Clear	
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Parity-One-Pager.pdf		Do NOT upload any documents with personally identifiable health information!
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		MHPAEA-FAQs.pdf
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## 6. Click **Attach File**.

Document Manager		×
Type to Search	Clear	_
File		
Demo File.docx		
MHPAEA-FAQs.pdf		Choose a file or drag it here
Parity-One-Pager.pdf		Do NOT upload any documents with personally identifiable health information!
	- h =	
		MHPAEA-FAQs.pdf
	Cit	Attach File
		Close

7. Click **Close**.



Type to Search	Clear	×
File Demo File.docx		$\checkmark$
MHPAEA-FAQs.pdf Parity-One-Pager.pdf		<b>Choose a file</b> or drag it here. Do NOT upload any documents with personally identifiable health information!
		MHPAEA-FAQs.pdf
	•	Attach File
		Ctose

The attached document, along with the citation details, will display in the document area.

Demo Commercial Product Line - Standard 3:	Parity Compliance						
Plan Informat	ion NQTLs	Factors	Measures	Comparative Analysis	Findings & Conclusions	Standards	
3.1 Parity Compliance Program 3.2 Parity C	ompliance Activities	3.3 Ad	dressing Parity Vic	3.4 Parity Com	oliance Program Evaluation	Standard	1: Business Management
	3.3 Address	sing Par	ity Violatic	ons		Standard Standard	2: Personnel 3: Parity Compliance
The organization monitors, tracks and addresse constitutes parity violations. [M]	parity violations.	As part of t	his process, the	e organization identifies cle	ar criteria as to what	Standard Limits	4: Annual/Lifetime Dollar
The organization: a. Identifies what constitutes a parity violation.						Standard Classificat	5: Benefit Identification and ion
<ul> <li>b. Implements a process to:</li> <li>i. Monitor, detect, and identify potential parity</li> </ul>	iolations.					Standard	6: Financial Requirements
ii. Respond to detected or identified potential p iii. Take action to investigate a potential parity	arity violations. violation.					Standard Limitation	7: Quantitative Treatment s (QTLs) Requirements
<ul> <li>c. Manages complaints/grievances related to p</li> </ul>	anty compliance.					Standard Quantitati (NQTLs)	8: Identification of Non- ve Treatment Limitations
Supporting Documentation						Standard Written"	9: Comparative Analysis "As
Document Cita MHPAEA-FAOs.pdf Pag	ion 15 👕					Standard Operation	10: Comparative Analysis "In "
						Standard Necessity	11: Disclosure of Medical Criteria
						Standard Reasons	12: Disclosure of Denial
						Standard Compliane	13: Disclosure of Parity ce Analysis

## To detach a document from a response:

1. Click the trash can icon next to the document that you would like to detach from the response.



Plan Information	NOTLS	Factors	Measures	Comparative Analy:	is Findings & Conclusions	Standards
				-		
1. Identify	Factors		2. Define Fa	ectors	3. Sources & Evidentiary Sta	ndards
or each NOTI select applicable factor(s) and prov	ide annron	ciate sources a	orf applicable	quantitative or qualitat	ive evidentiary standard(s) tha	t reflect an adequate basis for determining
whether and how the NQTL is applied to a particul	ar benefit.					
Lauffication					Mental He	alth/Substance Use 🖌 Medical/Surgical
at or Network inpatient.*	_					
Formulary Design		Apply 1	o all Factors			
Geographic Restrictions				Factor		
Medical Necessity Criteria			~	Safety risks		
Network Tier Design						
Pharmacy - Medical Necessity						Add Source here
Process for Assessment of New Technologies		Sour	ce			
Provider Credentialing		🗆 A cei	tain number/t	ype of recognized medi	cal literature and professional s	tandards (including comparative
Retrospective Review		effec	tiveness studi	es and clinical trials), an	d published research studies.	
Service Limitations		Accri	ditation stand	lards for quality assura	nce,	
	*	<ul> <li>Clain episc</li> </ul>	ns data show t des of care.	that 25 percent of patie	nts stayed longer than the med	lian length of stay for acute hospital
		Coeff	icient of variat	tion exceeding 0.8.		
		Save *	De	ocument		Citation

**Note:** Once uploaded into the system for a given product line, the documents cannot be deleted by the users in the Document Manager.

#### **Sections**

Accreditation applicants are required to complete all sections for each product line associated with their accreditation application. Organizations with ParityManager<sup>TM</sup> license agreements will focus their efforts in the sections outside of the **Standards** section. Additional automated parity checks occur within the Questionnaires within Standards 4, 6 and 7.

#### **Plan Information**

The **Plan Information** section is used for capturing basic information and a summary description of the product line.

To access the response page, select the **Plan Information** section from the product line navigation bar. Provide responses in the applicable fields, which include:



Demo Commercial Product Line
Plan Information NQTLs Factors Measures Comparative Analysis Findings & Conclusions Standards
Provide the plan name, annual enrollment, and SERFF tracking numbers with approval dates, if applicable.
Provide a summary description of your product line.

- 1. Name: Plan name. The current plan name will pre-populate in this field and may be updated, as needed.
- 2. Annual Enrollment: Annual enrollment for the product line.
- 3. **SERFF #:** System For Electronic Rate and Form Filing (SERFF) tracking number(s) for the product line, if applicable.
- 4. **Approval Date:** Approval date for SERFF tracking number(s), if applicable.
- 5. **Provide a summary description of your product line:** Summary description of the product line.
- 6. Click Save.

#### To add or delete SERFF numbers:

Plan Information	NQTLs Factors	Measures Compara	tive Analysis	Findings & Conclus	ions Standards	
Provide the plan	name, annual enrollr	ment, and SERFF trac	king numbers	with approval d	ates, if applicable.	
Na	me					
C	Demo Commercial Product	: Line				
An	nual Enrollment					
SE	RFF #	Approval Date				
	WLP-129529776	09/20/2022 2	+	3		
A	WLP-129529775	02/12/2023	-	4		
				-		
Provide a summary de	scription of your product line.					



- 1. Fill in the **SERFF** # field.
- 2. In the **Approval Date** field, click the calendar icon and select the appropriate date. The plus icon will then become enabled.
- 3. Click the plus icon ( + to insert a new row.
- 4. To delete a row, click the minus icon (

### NQTLs

The **NQTLs** section is used to identify NQTLs, define them, and identify them by benefit and covered service classification.

The section is comprised of three sub-sections:

Demo Commercial Product Line		
Plan Information NQTLs Factors Measures Com	parative Analysis Findings & Conclusions S	Standards
Provide your organization's list of identified NQTLs. This section is comprised of three tabs. To comply your NQTLs, the other tabs and sections will be populated with your list.	ete, click on each tab and follow the instructions pro	vided in the shaded box. As you identify
Identification of NQTLs. URAC has provided you a default list of some of the most common NQTLs indicate whether it is Medical/Surgical or Mental Health/Substance Use and identify the respective NOTE: If you have saved selected responses to an identified NQTL and you return and uncheck that Classification In Network Inpatient •	reported. Your organization may use this list or add classification or sub-classification. It NQTL in this tab, all saved information will be dele Add NQTL here	custom NQTLs. For each NQTL listed, eted from all sections.
NQTL	Mental Health/Substance Use	Medical/Surgical
Alternative payment models, such as bundled payments for episodes of care		
Alternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits")		
Alternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits") Dosage limits		
Atternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits") Dosage limits Employee Assistance Program requirements		
Atternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits") Dosage limits Employee Assistance Program requirements Exclusion of wilderness therapy for mental health or substance use disorder conditions on the grounds that the treatment is "experimental or investigational."		
Atternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits") Dosage limits Employee Assistance Program requirements Exclusion of wilderness therapy for mental health or substance use disorder conditions on the grounds that the treatment is "experimental or investigational." Exclusion or limitation of coverage of applied behavioral analysis based on clinical guidelines		
Atternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits") Dosage limits Employee Assistance Program requirements Exclusion of wilderness therapy for mental health or substance use disorder conditions on the grounds that the treatment is "experimental or investigational." Exclusion or limitation of coverage of applied behavioral analysis based on clinical guidelines Exclusion or limitation of coverage of methadone treatment based on clinical guidelines		
Atternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits") Dosage limits Employee Assistance Program requirements Exclusion of wilderness therapy for mental health or substance use disorder conditions on the grounds that the treatment is "experimental or investigational." Exclusion or limitation of coverage of applied behavioral analysis based on clinical guidelines Exclusion or limitation of coverage of methadone treatment based on clinical guidelines Exclusion or limitation of coverage of nutritional counseling based on clinical guidelines		
Atternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits") Dosage limits Employee Assistance Program requirements Exclusion of wilderness therapy for mental health or substance use disorder conditions on the grounds that the treatment is "experimental or investigational." Exclusion or limitation of coverage of applied behavioral analysis based on clinical guidelines Exclusion or limitation of coverage of methadone treatment based on clinical guidelines Exclusion or limitation of coverage of nutritional counseling based on clinical guidelines Exclusions		
Atternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits") Dosage limits Employee Assistance Program requirements Exclusion of wilderness therapy for mental health or substance use disorder conditions on the grounds that the treatment is "experimental or investigational." Exclusion or limitation of coverage of applied behavioral analysis based on clinical guidelines Exclusion or limitation of coverage of methadone treatment based on clinical guidelines Exclusion or limitation of coverage of nutritional counseling based on clinical guidelines Exclusions Exclusions		
Atternative payment models, such as bundled payments for episodes of care Concurrent review (including outlier models and "soft limits") Dosage limits Employee Assistance Program requirements Exclusion of wilderness therapy for mental health or substance use disorder conditions on the grounds that the treatment is "experimental or investigational." Exclusion or limitation of coverage of applied behavioral analysis based on clinical guidelines Exclusion or limitation of coverage of methadone treatment based on clinical guidelines Exclusion or limitation of coverage of nutritional counseling based on clinical guidelines Exclusions Total Selected	<ul> <li></li></ul>	

- 1. Identify NQTLs is for identifying the NQTLs within each respective classification.
- 2. **Define NQTLs** is for providing a definition for each identified NQTL.
- 3. Apply Benefits to NQTL is for identifying NQTLs by benefit and covered service classification.

## **Identify NQTLs**

As you save the NQTLs in this sub-section, the selections will build the list of NQTLs available in the subsequent sub-sections and sections:

• **NQTLs** Section:



- **Define NQTLs** sub-section
- o Apply Benefits to NQTL sub-section
- **Factors** Section:
  - o Identify Factors sub-section
  - **Define Factors** sub-section
  - o Sources & Evidentiary Standards sub-section
- Measures Section
- Comparative Analysis Section
- Findings and Conclusions Section

The **Identify NQTLs** sub-section must contain a response in each relevant classification and benefit category:

				<u>cial Product Line</u>	Demo Commen
	alysis Findings & Conclusions Standards	Factors Measures Comparative	NQTLs Facto	Plan Information	
haded box. As you identify	each tab and follow the instructions provided in the shaded 3. Apply Benefits to NQTL	n is comprised of three tabs. To complete, click o nyour list. 2. Define NQTLs	s section is compri ted with your list. NQTLs	anization's list of identified NQTLs. This s other tabs and sections will be populate 1. Identify N	ovide your org ur NQTLs, the
ies secons.	r organization may us or sub-classification tab, all saved information us use user the market of the saved information of the saved of	Benefit classifications for a commercial plan	efault li Be alth/Sul for entified	of NQTLs. URAC has provided you a defa her it is Medical/Surgical or Mental Healt have saved selected responses to an iden	Identification of indicate wheth NOTE: If you h
Ad	Add/NQTL here			atient •	n Network Inp
Medical/Surgical	Mental Health/Substance Use Me	/		In Network Inpatient	NQTL
		episodes of care	episodes o	Out of Network Inpatient	Alternative p
		")	')	In Network Outpatient - Other	Concurrent re
			ł	In Network Outpatient - Office Based	Dosage limit
				Out of Network Outpatient - Other	Employee As
		nce use disorder conditions on the al."	Based nce use dis ial."	Out of Network Outpatient - Office Bas Emergency Benefits	Exclusion of grounds that
		lysis based on clinical guidelines	ilysis base	Prescription Drugs	exclusion or
		based on clinical guidelines	atment based on o	mitation of coverage of methadone treat	xclusion or t
		based on clinical guidelines	nseling based on c	mitation of coverage of nutritional couns	Exclusion or l
					Exclusions
0	0			i	Total Selected
	0			1	Total Selected

Organizations may select NQTLs from the default list provided in the **Identify NQTLs** sub-section or add custom NQTLs. To add, edit or delete a custom NQTL, see <u>Custom Items</u>. Custom NQTLs will only be associated with the current product line.

There are instances where multiple products should be grouped together, such as for accreditation and/or reporting to State and/or Federal regulators, and a master list of NQTLs can be created. This master list will be available within all product lines in a defined group. For information about master lists, see <u>Data Sharing</u>.



## To identify NQTLs:

Demo Commer	cial Product Line								
	Plan Information NQTL	Ls Factors	Measures Comparative	Analysis Findings &	Conclusions	Standards			
Provide your org your NQTLs, the	rovide your organization's list of identified NQTLs. This section is comprised of three tabs. To complete, click on each tab and follow the instructions provided in the shaded box. As you identify our NQTLs, the other tabs and sections will be populated with your list.								
	1. Identify NQTL	s	2. Define NQTLs	3. Apply	Benefits to NQTL				
Identification indicate whet NOTE: If you I	of NQTLs. URAC has provided you a default l her it is Medical/Surgical or Mental Health/Su have saved selected responses to an identifier	ist of some of the m Ibstance Use and ide d NQTL and you retu	ost common NQTLs reporte entify the respective classifi urn and uncheck that NQTL	d. Your organization may cation or sub-classificatio in this tab, all saved infor	use this list or add m. mation will be dele	I custom NQTLs. For each NQTL listed,			
Classification In Network Inp	patient *	2			Add NQTL here	Add			
NQTL	In Network Inpatient	-		Mental Health/Subs	tance Use	Medical/Surgical			
Exclusions fo	Out of Network Inpatient								
Exclusions fo	In Network Outpatient - Other	as clinical social w	orkers						
Fail first polic	In Network Outpatient - Office Based								
Formulary de	Out of Network Outpatient - Other								
Generic medi	Out of Network Outpatient - Office Based								
Limits on pro	Emergency Benefits	s") (e.g., crisis or ex	tended session						
codes, prohit	Prescription Drugs	etc.)							
Medical appr	opnateriess, e.g., cunical guideunes.								
Medical nece	ssity criteria/clinical appropriateness criteria a	nd internal guidelin	es that govern	•					
Network prov	vider reimbursement rates								
Total Colorta	d					2			
Total Selecte	u			5		3 👻			

- 1. Select the **NQTLs** section in the product line navigation bar.
- 2. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 3. Click the check boxes in the corresponding benefit category columns for each NQTL selection.
- 4. Click Save.

**Warning:** If you have saved responses for an identified NQTL and you return and uncheck that NQTL in the **Identify NQTLs** sub-section, all saved information will be deleted from all sub-sections and sections.

#### **Completion Check Marks**

When at least one NQTL has been saved in each benefit category within a classification, a check mark will display next to the corresponding classification in the **Classification** dropdown.



	Plan Information	NQTLs Factors Measures Comparativ	re Analysis Findings & Conclusions St	andards
vide your orga ur NQTLs, the o	nization's list of identified NQTLs. The ther tabs and sections will be popul 1. Identif <u>CNQTLs.</u> URAC has provided you a d	his section is comprised of three tabs. To complete, cli lated with your list. fy NQTLs 2. Define NQTLs default list of some of the most common NQTLs report	ck on each tab and follow the instructions provi 3. Apply Benefits to NQTL ted. Your organization may use this list or add c	ded in the shaded box. As you identify ustom NQTLs. For each NQTL listed,
ndicate wheth NOTE: If you ha	er it is Medical/Surgical or Mental He we saved selected responses to an io	ealth/Substance Use and identify the respective classi dentified NQTL and you return and uncheck that NQT	fication or sub-classification. L in this tab, all saved information will be delet	ed from all sections.
Tassification Dut of Network	Inpatient -		Mental Health/Substance Use	Medical/Surgical
Lessification Dut of Network NQTL	Inpatient • In Network Inpatient Out of Network Inpatient		Add NQIL nere	Addical/Surgical
Dut of Network	Inpatient - In Network Inpatient Out of Network Inpatient In Network Outpatient - Other	as clinical social workers	Mental Health/Substance Use	Medical/Surgical
Dut of Network NQTL Exclusions fc Fail first polic	Inpatient - In Network Inpatient Out of Network Inpatient In Network Outpatient - Other In Network Outpatient - Office Base	as clinical social workers	Mental Health/Substance Use	Medical/Surgical
Dut of Network NQTL Exclusions fo Fail first polic Formulary de Generic mod	Inpatient - Out of Network Inpatient Out of Network Inpatient In Network Outpatient - Other In Network Outpatient - Other	as clinical social workers	Mental Health/Substance Use	Medical/Surgical
Dut of Network NQTL Exclusions fc Fail first polic Formulary de Generic medi Limits on pro codes, prohit	Inpatient - Out of Network Inpatient Out of Network Inpatient In Network Outpatient - Other In Network Outpatient - Other Out of Network Outpatient - Other Out of Network Outpatient - Office Emergency Benefits	ed Based ="") (e.g., crisis or extended session etc.)	Mental Health/Substance Use	Medical/Surgical
Dut of Network NQTL Exclusions fo Fail first polic Formulary de Generic medi Limits on pro codes, prohit Medical appr	In Network Inpatient Out of Network Inpatient In Network Outpatient - Other In Network Outpatient - Office Base Out of Network Outpatient - Other Out of Network Outpatient - Office Emergency Benefits Prescription Drugs	ed Based s") (e.g., crisis or extended session etc.)	Mental Health/Substance Use	Medical/Surgical
Dut of Network NQTL Exclusions fc Fail first polic Formulary de Generic medi Limits on pro codes, prohit Medical appr Medical necess benefit coverai	Inpatient - Out of Network Inpatient Out of Network Inpatient In Network Outpatient - Other In Network Outpatient - Office Burgency Benefits Prescription Drugs ity criteria/clinical appropriateness c ge or Level of care decisions	as clinical social workers ed Based s") (e.g., crisis or extended session etc.)	Mental Health/Substance Use	Medical/Surgical
but of Network NQTL Exclusions for Fail first polie Formulary de Generic medi Limits on pro codes, prohit Medical necess benefit coverag Network provi	Inpatient - In Network Inpatient Out of Network Inpatient In Network Outpatient - Other In Network Outpatient - Office Base Out of Network Outpatient - Office Emergency Benefits Prescription Drugs ity criteria/clinical appropriateness of ge or level of care decisions der reimbursement rates	as clinical social workers ed Based s") (e.g., crisis or extended session etc.) criteria and internal guidelines that govern	Mental Health/Substance Use	Medical/Surgical

After all classifications have been completed, a check mark will display in the **Identify NQTLs** tab.

	Plan Information NQTI	s Factors Measures Comparative Analy	vsis Findings & Conclusions Stand	lards
ivide ar N	e your organization's list of identified NQTLs. This secti QTLs, the other tabs and sections will be populated wi	Check mark displays after completing all classifications	tab and follow the instructions provided	f in the shaded box. As you iden
	1. Identify NQTL	2. Define NQTLs	3. Apply Benefits to NQTL	
ien Idio IOT	tificater All classifications are complete	ist of some of the most common NQTLs reported. You bstance Use and identify the respective classification of NQTL and you return and uncheck that NQTL in this	r organization may use this list or add cust or sub-classification. tab, all saved information will be deleted f	om NQTLs. For each NQTL listee
Ne	etwork In atient *			
			Mantal Health/Substance Lice	Medical/Surpical
	NQ' V In Network Inpatient		mental meatury substance use	medicationgicat
	NQ V In Network Inpatient For Out of Network Inpatient			
	NQ         ✓         In Network Inpatient           Forr         ✓         Out of Network Inpatient           Ger         ✓         In Network Outpatient - Other           Lim         ✓         In Network Outpatient - Office Based	y edits") (e.g., crisis or extended session rices, etc.)		
	NQ     In Network Inpatient       For     Out of Network Inpatient       Ger     In Network Outpatient - Other       Lim     In Network Outpatient - Other       Out of Network Outpatient - Other     In Network Outpatient - Other       Met     Out of Network Outpatient - Other	) edits") (e.g., crisis or extended session rices. etc.)		
	NQ     In Network Inpatient       Forr     V     Out of Network Inpatient       Ger     In Network Outpatient - Other       Lim     In Network Outpatient - Office Based       V     Out of Network Outpatient - Office Based       V     Out of Network Outpatient - Other       V     Out of Network Outpatient - Office Based       Me     V     Out of Network Outpatient - Office Based       Me     V     Dut of Network Outpatient - Office Based       Me     V     Emergency Benefits	y edits") (e.g., crisis or extended session rices, etc.) 'ia and internal guidelines that govern		
	NQ     In Network Inpatient       For     Ut of Network Inpatient       Ger     In Network Outpatient - Other       Lim     In Network Outpatient - Other       V     In Network Outpatient - Other       Mee     Out of Network Outpatient - Other       Mee     Out of Network Outpatient - Other       Mee     Out of Network Outpatient - Other       Mee     Prescription Drugs	edita") (e.g., crisis or extended session rices, etc.) "ia and internal guidelines that govern		
	NQ     In Network Inpatient       For     Ut of Network Inpatient       Ger     In Network Outpatient - Other       Lim     In Network Outpatient - Other       Mee     Out of Network Outpatient - Other       Mee     Prescription Drugs       Network Tier Design	edita") (e.g., crisis or extended session rices. etc.) "ia and internal guidelines that govern		
	NQ     In Network Inpatient       For     V       Out of Network Inpatient       Ger     In Network Outpatient - Other       Lim     Network Outpatient - Other       V     In Network Outpatient - Other       Mee     Out of Network Outpatient - Other       Mee     Out of Network Outpatient - Other       Mee     Prescription Drugs       Network Tier Design       Outlier Review	edits") (e.g., crisis or extended session rices, etc.) "ia and internal guidelines that govern		
	NQ     In Network Inpatient       For     V       Not of Network Inpatient       Ger     In Network Outpatient - Other       Lim     Network Outpatient - Other       V     In Network Outpatient - Other       Mee     V       Mee     V       Mee     Prescription Drugs       Network Tier Design       Outlier Review       Pharmacy – Prior Authorization	edits") (e.g., crisis or extended session rices, etc.) "ia and internal guidelines that govern		



## **Define NQTLs**

As a prerequisite for completing the **Define NQTLs** sub-section, the **Identify NQTLs** sub-section *must* have the applicable NQTL, classification and benefit category selected.

An option is available to attach documentation instead of adding the NQTL definitions manually in the interface. To use this option, see <u>Providing Documentation with an NQTL Definition</u>.

#### To provide an NQTL definition:

Demo Commercial Product Line				
Plan Information NQTLs	Factors Measures Co	mparative Analysis	Findings & Conclusions	Standards
Provide your organization's list of identified NQTLs. This section is co your NQTLs, the other tabs and sections will be populated with your	omprised of three tabs. To comp ' list.	olete, click on each tab	and follow the instructions p	provided in the shaded box. As you identify
1. Identify NQTLs	2. Define NQ	ſLs	3. Apply Benefits to NQT	L
NQTL	Defining NQTLs. Provide a c	lescription for each of t	he plan's applicable NQTL.	
Application of Medical Necessity Criteria	NOTE: To provide NQTL def	inition, select applicabl	e NQTL from list on the left.	
Concurrent Review	Update definition for NOTL	here		
Medical Management - Disease Management	4			
3 Network Tier Design	-			
Process for Assessment of New Technologies				
Retrospective Review				
Service Limitations				
5	Save •	Document	c	//

- 1. Select the **NQTLs** section in the product line navigation bar.
- 2. Select the **Define NQTLs** tab.
- 3. Select the appropriate NQTL.
- 4. Enter a description of the NQTL into the text box.
- 5. Click Save.

Repeat the above steps for each applicable NQTL.

#### **Completion Check Marks**

When the definition entered for an NQTL has been saved, a check mark will display next to the corresponding NQTL name on the left. The check mark indicates the NQTL is complete.



Demo Commercial Product Line								
Plan Information NQTLs	Factors Measures	Comparative Analysis	Findings & Conclusions	Standards				
Provide your organization's list of identified NQTLs. This section is comprised of three tabs. To complete, click on each tab and follow the instructions provided in the shaded box. As you identify your NQTLs, the other tabs and sections will be populated with your list.								
1. Identify NQTLs	2. Define	e NQTLs	3. Apply Benefits to NC	ŲΤ∟				
NQTL	Defining NQTLs. Provid	de a description for each of	the plan's applicable NQTL					
Certification Requirements	NOTE: To provide NQTL definition, select applicable NQTL from list on the left.							
Formulary Design	Technology assessments are a structured analysis of a technology drug, or treatment that is performed for the purpose of							
✓ Medical Necessity Criteria	providing input to clinic	providing input to clinical policy. Technology assessments include an examination of safety, efficacy, feasibility outside of						
Process for Assessment of New Technologies	ethical implications and	the investigational setting, comparability to existing technologies relative to outcomes, indications for use, as well as ethical implications and consequences. Technology assessments are comprehensive and are firmly based on research,						
Retrospective Review	clinical evidence, and a	pplication of the scientific i	nethod.					
				h				
	Save •	Document		Citation				

# When all applicable NQTLs are complete, a check mark will display in the **Define NQTLs** tab.

Demo Commercial Product Line						
Plan Information NQTLs	Factors Measures Comparative Analysis Findings & Conclusions Standards					
Provide your organization's list of identified NQTLs. This section is co your NQTLs, the other tabs and sections will be populated with your	omprised of three tabs. To completing all NQTLs rovided in the shaded box. As you identify list.					
complete 1. Identify NQTLs	2. Define NQTL 3. Apply Benefits to NQTL					
NQTL  Application of Medical Necessity Criteria	<u>Defining NQTLs.</u> Provide a description for each of the plan's applicable NQTL. NOTE: To provide NQTL definition, select applicable NQTL from list on the left.					
✓ Concurrent Review	The application of criteria against which benefit authorization requests are compared to determine whether the benefit is					
Fail-First Protocols	appropriate for the evaluation and treatment of a disease, condition, illness or injury and consistent with the applicable standard of care.					
Network Tier Design						
<ul> <li>Process for Assessment of New Technologies</li> </ul>						
✓ Retrospective Review						
✓ Service Limitations						
_	Save Document Citation					



### Providing Documentation with an NQTL Definition

Responses to the **Define NQTLs** sub-section may be provided by attaching documentation. If using this option, documentation and citation information must be attached to each applicable NQTL.

<u>[</u>	Demo Commercial Product Line					
	Plan Information NQTLs	Factors	Measures	Comparative Analysis	Findings & Conclusions	Standards
Pr yo	ovide your organization's list of identified NQTLs. This section ur NQTLs, the other tabs and sections will be populated with 1. Identify NQTLs	n is comprised n your list.	of three tabs. To 2. Defir	o complete, click on each t ne NQTLs	ab and follow the instructions 3. Apply Benefits to NQ	provided in the shaded box. As you identif TL
	NOTI					
	Formulary Design	Defini NOTE	<u>ng NQTLs.</u> Prov : To provide NO	ide a description for each ( TL definition, select applic	of the plan's applicable NQTL. able NOTL from list on the left	
	Geographic Restrictions					
、	<ul> <li>Medical Necessity Criteria</li> </ul>	Update	e definition for N	IQTL here		
	Network Tier Design					
	Pharmacy – Medical Necessity					
	Process for Assessment of New Technologies					
	Provider Credentialing					
	Retrospective Review					
	Service Limitations	(4)	-	Document		Citation
	Ŧ	5	Add Docume	nt		

## To attach a document with an NQTL definition:

- 1. Select the **NQTLs** section in the product line navigation bar.
- 2. Select the **Define NQTLs** tab.
- 3. Select the appropriate NQTL.
- 4. Click the down arrow to the right of the **Save** button.
- 5. Select **Add Document**. A pop-up window for the Document Manager will open. For instructions on how to add documents, see <u>Document Manager</u>.

After you have attached the document(s) for the selected NQTL, a check mark will display next to the corresponding NQTL name on the left. The definition field is deemed complete for the NQTL.

#### **Apply Benefits to NQTL**

As a prerequisite for completing the **Apply Benefits to NQTL** sub-section, the **Identify NQTLs** sub-section *must* have the applicable NQTL, classification and benefit category selected. Organizations may use the default list of covered services provided in the **Apply Benefits to NQTL** sub-section or add their own covered services. For information about adding custom services, see <u>Custom Covered Services</u>.

An option is available to attach documentation instead of making the benefit selections in the interface. To use this option, see <u>Uploading Documentation with Response</u>.



## To apply benefits to an NQTL:

	Plan Information	s Factors Measures Comparative Analysis Findings & Conclusions Standards	
	r an monitation	a radora medarea comparente Analysia initianga e conclusiona Standarea	
rovide vour ora	nanization's list of identified NOTLs. This section	on is comprised of three table. To complete, click on each tab and follow the instructions provided in the shaded h	ox As you identify
our NQTLs, the	other tabs and sections will be populated with	h your list.	
	1. Identify NQTLs	2. Define NQTLs 3. Apply Benefits to NQTL	
For each NQT	L selected from the list, identify the applicable	e Medical/Surgical and/or Mental Health/Substance Use Disorder covered service within each classification and s	ub-classification.
NOTE: Organi	izations may use the "List Manager" to upload a	a list of covered services and assign Medical/Surgical or Mental Health/Substance Use Disorder and classificatio	on/sub-classification
simultaneous	lγ.		
		4 Mental Health/Substance Use	Medical/Surgical
In Network OL	utpatient - Office Based *		
	In Network Inpatient		
	Out of Network Inpatient	Add covered service here	Add
	In Network Outpatient - Other		Select
	In Network Outpatient - Office Based		Not Applical
NQTL	Out of Network Outpatient - Other	Covered Service	
	Out of Network Outpatient - Office Based	6 Individual Psychotherapy with Medication Management	
Applicatio		Interactive Complexity Add-On Code for Psychotherapy	
Applicatic	Emergency Benefits		
Applicatic Concurrer	Emergency Benefits Prescription Drugs	Librium - to 100 mg	
Applicatic Concurrer Medical M	Emergency Benefits Prescription Drugs lanagement - Disease Management	Librium - to 100 mg     Medication Management	
Applicatic Concurrer Medical M Network T	Emergency Benefits Prescription Drugs lanagement - Disease Management	Librium - to 100 mg         Image: Medication Management         Neuropsychological Testing	
Applicatio Concurrer Medical M Network T	Emergency Benefits Prescription Drugs lanagement - Disease Management fier Design r Assessment of New Technologies	Librium - to 100 mg         Medication Management         Neuropsychological Testing         Observation Services	
Applicatio Concurren Medical M Network T Process fo	Emergency Benefits Prescription Drugs lanagement - Disease Management Fier Design rr Assessment of New Technologies	Librium - to 100 mg         Medication Management         Neuropsychological Testing         Observation Services         Office Visits	
Applicatio Concurren Medical M Network T Process fo Retrospec	Emergency Benefits Prescription Drugs Janagement - Disease Management Tier Design or Assessment of New Technologies tive Review	Librium - to 100 mg       Medication Management       Neuropsychological Testing       Observation Services       Office Visits       Perphenazine - to 5 mg	
Application Concurrent Medical M Network T Process for Retrospect	Emergency Benefits Prescription Drugs Ianagement - Disease Management Tier Design or Assessment of New Technologies tive Review mitations	Image: Constraint of the second se	
Applicatio Concurrer Medical M Network T Process fo Retrospec Service Lin	Emergency Benefits Prescription Drugs anagement - Disease Management rier Design r Assessment of New Technologies tive Review mitations	Image: Constraint of the second se	
Applicatio Concurrer Medical M Network T Process fo Retrospec Service Lin	Emergency Benefits Prescription Drugs anagement - Disease Management fier Design ar Assessment of New Technologies tive Review mitations	Image: Constraint of the second se	
Applicatic Concurrer Medical M Network T Process fo Retrospec Service Lin	Emergency Benefits Prescription Drugs anagement - Disease Management rier Design r Assessment of New Technologies tive Review mitations	<ul> <li>Librium - to 100 mg</li> <li>Medication Management</li> <li>Neuropsychological Testing</li> <li>Observation Services</li> <li>Office Visits</li> <li>Perphenazine - to 5 mg</li> <li>Psychiatric diagnosis evaluation</li> <li>Psychological Testing</li> <li>Psychological Testing</li> <li>Risperidone - 0.5 mg</li> </ul>	

- 1. Select the **NQTLs** section in the product line navigation bar.
- 2. Select the Apply Benefits to NQTL tab.
- 3. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 4. Select the appropriate benefit category tab. The highlighted tab indicates the response is being provided for that category.
- 5. Select the NQTL for which you want to apply benefits.
- 6. Under **Covered Service**, click the check box for each applicable service.
- 7. Click Save.

Repeat the above steps for each identified NQTL, benefit category and classification.

## **Completion Check Marks**

When at least one covered service has been saved for an NQTL within a benefit category, a check mark will display in the corresponding category tab.



Demo Commercial Product Line									
Plan Information	NQTLs	Factors	Measures	Comparativ	e Analysis	Findings	& Conclusions	Standards	
rovide your organization's list of identified NQTLs. TI our NQTLs, the other tabs and sections will be popul	his section is lated with ye	s comprised o our list.	f three tabs. To	o complete, clie	k on each tal	b and follow	the instructions pr	ovided in the sh	aded box. As you identify
1. Identif	y NQTLs		2. Define	NQTLs 🗸		З. Арр	ly Benefits to NQTI	L	
For each NQTL selected from the list, identify the a NOTE: Organizations may use the "List Manager" to simultaneously. Classification Out of Network Inpatient ▼	pplicable Me	edical/Surgica	il and/or Menta services and a	ıl Health/Subs	tance Use Di: Surgical or M	sor The	e check mar at least or Mental Hea	k displays ne covered hth/Substance Us	a upon saving d service Medical/Surgical
							Add covered set	rvice here	Add •
NQTL					Covered Se	ervice			
Application of Medical Necessity Criteria		_			Bridge App	ointments			
Concurrent Poviow		Cove	red servi	ce 🛛	Concurrent	Case Mgmt			
		_			Electroshoo	ck Therapy II	P Services		
Fail-First Protocols					Hospital Di	ischarge			
Medical Management - Disease Management					Mental Hea	ient alth IP Admi	ssion		
Network Tier Design					Nursing Fac	cility Care	551011		
Process for Assessment of New Technologies					Targeted C	ase Mgmt			
Retrospective Review									
Service Limitations									
				Save		Docur	nent	Citati	on

When the covered service selection has been completed for all applicable benefit categories within a classification, a check mark will display next to the corresponding classification in the **Classification** dropdown.



Demo Comme	rcial Product Line									
	Plan Information	NQTLs	Factors	Measures	Comparativ	e Analysis	Findings & (	Conclusions	Standards	
Provide your or your NQTLs, the	ganization's list of identified NQTLs. T e other tabs and sections will be popu	his section is lated with yo	comprised of our list.	f three tabs. To	complete, cli	k on each tab	b and follow th	ne instructions	provided in the	shaded box. As you identify
	1. Identif	y NQTLs		2. Define I	NQTLs 🗸		3. Apply	Benefits to NC	ΩTL	
For each NQ NOTE: Orgar simultaneou: Out of Netwo	TL selected fre nizations may sly. rk Inpatient -	displays all categ classific	s after gories ation	and/or Mental ervices and as	l Health/Subs	tance Use Dis Surgical or M	sorder covered lental Health/S	l service withi Gubstance Use Mental Heal	n each classific Disorder and th/Substance Us	Completed categories
	In Letwork Inpatient Ut of Network Inpatient In Network Outpatient - Other In Network Outpatient - Office Bas	ed						Add covered	service here	Add  Select All Not Applicable
NQTL	Out of Network Outpatient - Other					Covered Se	ervice			
A	Out of Network Outpatient - Office	Based				Bridge App	ointments			
Appucation	Emergency Benefits					Concurrent	Case Mgmt			
Concurren	Prescription Drugs					Electroshoo	ck Therapy IP S	Services		
Fail-First	Protocols					Hospital Di	ischarge			
Medical N	lanagement - Disease Management					Initial Inpat	ient			
Network	Tier Design					Mental Hea	alth IP Admissi	ion		
Network	Her Design					Nursing Fac	cility Care			
Process for	or Assessment of New Technologies					Targeted Ca	ase Mgmt			
Retrospe	ctive Review									
Service Li	mitations									
					Save	•	Docume	nt	Cit	tation

When the covered service selection has been completed for all applicable benefit categories <u>and</u> classifications, a check mark will display next to the corresponding NQTL name on the left.


Demo Commercial Product Line	
Plan Information NQTLs Factors Measures	Comparative Analysis Findings & Conclusions Standards
Provide your organization's list of identified NQTLs. This section is comprised of three tabs. To co your NQTLs, the other tabs and sections will be populated with your list.	omplete, click on each tab and follow the instructions provided in the shaded box. As you identify
1. Identify NQTLs 2. Define NO	2TLs ✓ 3. Apply Benefits to NQTL
For each NQTL selected from the list, identify the applicable Medical/Surgical and/or Mental H NOTE: Organizations may use the "List Manager" to upload a list of covered services and assig simultaneously.	Health/Substance Use Disorder covered service within each classification and sub-classification. gn Medical/Surgical or Mental Health/Substance Use Disorder and classification/sub-classification
In Network Outpatient - Office Based >	Mental Health/Substance Use 🗸 Medical/Surgical 🗸
In Network Inpatient Out of Network Inpatient In Network Outpatient - Office Based In Network Outpatient - Office Based	Add covered service here Add    Add
NQTL Out of Network Outpatient - Other	Covered Service
Applic Out of Network Outpatient - Office Based	Dialysis
Emergency Benefits	Family Planning Services
Prescription Drugs	Fluoride Rinse/Varnish
Fait-First Protocols	Genetic Testing
Medical Management - Disease Management	Newborn Office Services
Network Tier Design	
<ul> <li>Process for Assessment of New Technologies</li> </ul>	Oral Surgery - Adults
Retrospective Review	Oral Surgery - Children
Service the tions	Outpatient Hospital (non-emergency)
Check mark displays after completing	Outpatient Surgery; Ambulatory Surgery Centers
all benefit categories and classifications	Dais Macagement Convices (ambulatery)
relevant to the NQTL	Save   Document Citation

When the covered service selections have been completed for all NQTLs within all respective benefit categories and classifications, a check mark will display in the **Apply Benefits** tab.



Plan Information	NQTLs Fac	tors Measures	Comparative A	nalysis	Findings &	& Conclusions		
vide vour organization's list of identified NOTLs. T	his section is comp	rised of three tabs. To co	omplete, click o	n each tab	and follow	the instruction	Check mai complet	k displays after ting all NQTLs
r NQTLs, the other tabs and sections will be popu	lated with your list	-						
1. Identify	y NQTLs	2. Define NQ	TLs 🗸		3. Apply E	Benefits to NQ	T 🗹	
or each NQTL selected from the list, identify the a	pplicable Medical/	Surgical and/or Mental H	Health/Substan	ce Use Dis	order covere	ed service with	in each classificatio	n and sub-classification.
NOTE: Organizations may use the "List Manager" t	o upload a list of co	overed services and assi	ign Medical/Sur	gical or M	ental Health	/Substance Us	e Disorder and class	sification/sub-classification
innuttaneousty.								
lassification						Mental Hea	alth/Substance Use	Medical/Surgical 🗸
ALL								
Network Inpatient *								
Network Inpatient - NQTLs completed in all releve	vant					Add sources	d sou úse here	
Network Inpatient * NQTLs completed in all releve benefit categories and classifications	vant					Add covered	d service here	Add
Network Inpatient * NQTLs completed in all releve benefit categories and classifications	vant					Add covered	d service here	Add • • Select A • Not Applicab
Network Inpatient * NQTLs completed in all releve benefit categories and classifications	vant		с	overed Ser	rvice	Add covered	d service here	Add  Select A Not Applicab
Network Inpatient * NQTLs completed in all relev benefit categories and classifications	vant		C B	overed Se	<b>vice</b>	Add covered	d service here	Add • Select A Not Applicab
Network Inpatient * NQTLs completed in all relevels benefit categories and classifications NQTL Application of Medical Necessity Criteria Concurrent Review	vant			overed Ser ridge App oncurrent	rvice bintments Case Mgmt	Add covered	d service here	Add  Calculate Select A Not Applicab
Network Inpatient * NQTLs completed in all relev benefit categories and classifications NQTL Application of Medical Necessity Criteria Concurrent Review Fail-First Protocols	vant		C B C C C C	overed Ser ridge App oncurrent lectroshoc	r <b>vice</b> Dintments Case Mgmt k Therapy IF	Add covered	d service here	Add Select A Not Applicab
Network Inpatient * NUTLs completed in all relevations benefit categories and classifications NUTL Application of Medical Necessity Criteria Concurrent Review Fail-First Protocols Medical Management Dispace Management	vant			overed Ser ridge Approduction oncurrent lectroshoc lospital Dis-	vice pintments Case Mgmt k Therapy IP scharge ent	Add covered	d service here	Add Select A Not Applicat
Network Inpatient * NUTLs completed in all relev benefit categories and classifications NUTL Application of Medical Necessity Criteria Concurrent Review Fail-First Protocols Medical Management - Disease Management	vant			overed Ser ridge Appr oncurrent lectroshoc lospital Dis itial Inpati lental Hea	vice pintments Case Mgmt k Therapy IF scharge ent th IP Admis	Add covered 9 Services sion	d service here	Add Select A Not Applicat
Network Inpatient *         NUMEWORK Information for the state of th	nt		C B C C E H I I M N N	overed Ser ridge App oncurrent lectroshoc lospital Dis nitial Inpati lental Hea lursing Fac	vice Dintments Case Mgmt k Therapy IP scharge ent ent th IP Admis ility Care	Add covered Services sion	d service here	Add Select A Not Applicab
Network Inpatient *         Notice	nt			overed Sei ridge App oncurrent lectroshoc lospital Dis iitial Inpati lental Hea ursing Fac argeted Ca	vice ointments Case Mgmt k Therapy IF scharge ent th IP Admis ility Care use Mgmt	Add covered Services sion	d service here	Add Select A Not Applicat
Network Inpatient *         Notice         Denefit categories and classifications         NQTL         Application of Medical Necessity Criteria         Concurrent Review         Fail-First Protocols         Medical Management - Disease Management         Network Tier Design         Process for Assessment of New Technologi         Retrospective Review	nt es			overed Set ridge Appi oncurrent lectroshoc lospital Dis itial Inpati lental Hea lursing Fac argeted Ca	vice pintments Case Mgmt k Therapy IF scharge ent th IP Admis ility Care sse Mgmt	Add covered 9 Services sion	d service here	Add Select A Not Applicat
Network Inpatient *         benefit categories and classifications         NQTL         Concurrent Review         Fail-First Protocols         Medical Management - Disease Management         Process for Assessment of New Technologie         Retrospective Review         Service Limitations	nt es		C B C C E H I I M N N N I T	overed Sel ridge App oncurrent lectroshoc lospital Dis hitial Inpati lental Hea lursing Fac argeted Ca	vice ointments Case Mgmt k Therapy IP scharge ent ent Ith IP Admis ility Care ase Mgmt	Add covered P Services sion	d service here	Add Select A Not Applicab

# Uploading Documentation with Response

Responses to the **Apply Benefits to NQTL** sub-section may be provided by attaching documentation instead of making the benefit selections in the interface. If using this option, documentation and citation information must be attached to each applicable NQTL.



## To attach a document for an NQTL:

Plan Information       NUTLS       Factors       Messures       Comparative Analysis       Findings & Conclusions       Standards         Provide your organization's list of identified NQTLS. This section is comprised of three tabs. To complete, click on each tab and follow the instructions provided in the shaded box. As you identify your NQTLs, the other tabs and sections will be populated with your list.       2       3. Apply Benefits to NQTL         I. Identify NQTLs       2. Define NQTL       2       3. Apply Benefits to NQTL         For each NQTL selected from the list, identify the applicable Medical/Surgical and/or Mental Health/Substance Use Disorder covered services within each classification had-ub-classification is multineneously.       Mental Health/Substance Use Disorder and classification had-ub-classification had-ub-classification is multineneously.         Contractions       Mental Health/Substance Use Disorder and classification had-ub-classification is multineneously.       Mental Health/Substance Use Disorder and classification had-ub-classification is multineneously.         Contractions       Mental Health/Substance Use Disorder and classification and sub-classification and sub-classification is multineneously.       Mental Health/Substance Use Disorder and classification had-use of the statistication is multineneously.         Contractions       Mental Health/Substance Use Disorder and Classification data with each classification and sub-classification data with each classification and sub-classification and sub-classification and sub-classification and sub-classification and sub-classification data with each classification data with each classification a	Demo Commercial Product Line	1				
Provide your organization's list of identified NQTLs. This section is comprised of three tabs. To complete, click on each tab and follow the instructions provided in the shaded box. As you identify your NQTLs, the other tabs and sections will be populated with your list.  I. Identify NQTLs  2. Define NQTL  3. Identify NQTLs  4. Define NQTL  4. Defi	Plan Information	NQTLs Factors	Measures C	Comparative Analysis	Findings & Conclusions	Standards
1. Identify NQTLs       2. Define NQTL       2. Apply Benefits to NQTL         For each NQTL selected from the list, identify the applicable Medical/Surgical and/or Mental Health/Substance Use Disorder covered services and assign Medical/Surgical or Mental Health/Substance Use Disorder and classification due - classification.         NOTE: Organizations may use the "List Manager" to upload a list of covered services and assign Medical/Surgical or Mental Health/Substance Use Disorder and classification/sub-classification         Current organizations may use the "List Manager" to upload a list of covered services and assign Medical/Surgical or Mental Health/Substance Use Disorder and classification/sub-classification         Current organizations may use the "List Manager" to upload a list of covered services and assign Medical/Surgical or Mental Health/Substance Use Disorder and classification/sub-classification         Current organizations may use the "List Manager" to upload a list of covered services and assign Medical/Surgical or Mental Health/Substance Use Disorder and Classification for Medical Management         Application for Medical Management       Anone         Construct Review       Audiology Services         Disease Management       Corrent Sorvice         Disease Management       Corrent Sorvice         Disease Management       Ciandica Rehaba         Disease Management       Ciandica Rehaba         Disease Management       Ciandica Surgiv         Disease Management       Ciandica Surgiv         Disease Management	Provide your organization's list of identified NQTLs. Thi your NQTLs, the other tabs and sections will be popula	is section is comprised o ated with your list.	of three tabs. To cor	mplete, click on each ta	b and follow the instructions p	rovided in the shaded box. As you identi
For each NQTL selected from the list, identify the applicable Medical/Surgical and/or Mental Health/Substance Use Disorder and classification and sub-classification simultaneously.         NOTE: Organizations may use the "List Manager" to upload a list of covered services and assign Medical/Surgical or Mental Health/Substance Use Disorder and classification/sub-classification simultaneously.         Classification         In Network Outpatient - Office Based •         NOTE         Application for Medical Necessity         Case and Medical Management         Concurrent Review         Disease Management         Disease Management <t< td=""><td>1. Identify</td><td>NQTLs</td><td>2. Define N</td><td>QTLs 2</td><td>3. Apply Benefits to NQTL</td><td></td></t<>	1. Identify	NQTLs	2. Define N	QTLs 2	3. Apply Benefits to NQTL	
Cleastification       Medical/Substance       Medical/Substance       Medical/Substance       Medical/Substance       Add         In Network Outpatient - Office Based *       Add       Covered service here       Add       Covered service here       Add         In Network Outpatient - Office Based *       Add covered service here       Add       Covered Service       Covered Ser	For each NQTL selected from the list, identify the ap NOTE: Organizations may use the "List Manager" to simultaneously.	plicable Medical/Surgic upload a list of covered	al and/or Mental He services and assig	ealth/Substance Use D n Medical/Surgical or N	isorder covered service within e ⁄lental Health/Substance Use D	ach classification and sub-classification. isorder and classification/sub-classificat
Add covered service here       Add         Add covered service here       Add         Select A       NQTL         Application for Medical Necessity       Acne         Case and Medical Management       Acupuncture & Biofeedback Service         Case and Medical Management       Acupuncture & Biofeedback Service         Certification Requirements       Audiology Services         Coding Edits       Chemotherapy         Disease Management       Chiropractic Services         Disease Management       Cituic Visits         Disease Management       Cituic Visits         Disease Management       Cituic Visits         Disease Imitis       Cituic Visits         Employee Assistance Program requirements       Cosmetic Surgery         Dental Services       Decument Senvices         Dental Services       Decument Senvices	Classification In Network Outpatient - Office Based •				Mental F	Health/Substance 4 Medical/Surgi
NQTL Covered Service   Application for Medical Nacessity Acne   Case and Medical Management Acupuncture & Biofeedback Service   Certification Requirements Audiology Services   Coding Edits Cardiac Rehab   Disease Management Chiropractic Services   Disease Management Chiropractic Services   Disease Management Cincurrent Review   Disease Management Cincurrent Review   Disease Management Cincurrent Services					Add covered se	ervice here Add
NQTL   Application for Medical Necessity   Case and Medical Management   Certification Requirements   Coding Edits   Concurrent Review   Disease Management   Disease Management   Dosage limits   Employee Assistance Program requirements   Exclusions for Court-Ordered Treatment   Exclusions for Court-Ordered Treatment						Sele
Application for Medical Necessity   Case and Medical Management.   Certification Requirements   Coding Edits   Concurrent Review   Disease Management.   Disease Management.   Disease Management.   Dosage limits   Employee Assistance Program requirements   Exclusions for Court-Ordered Treatment   Exclusions for Court-Ordered Treatment	NQTL		<b>^</b>	Covered Serv	ice	
Case and Medical Management   Certification Requirements   Coding Edits   Concurrent Review   Disease Management   Dosage limits   Employee Assistance Program requirements   Exclusions for Court-Ordered Treatment   Exclusions for Court-Ordered Treatment	Application for Medical Necessity			Acne		
Certification Requirements   Coding Edits   Concurrent Review   Disease Management   Disease Management   Dosage limits   Employee Assistance Program requirements   Exclusions for Court-Ordered Treatment   Exclusions for Court-Ordered Treatment	Case and Medical Management		_	<ul> <li>Acupuncture</li> </ul>	& Biofeedback Service	
Coding Edits   Concurrent Review   Disease Management   Disease Management   Dosage limits   Employee Assistance Program requirements   Exclusions for Court-Ordered Treatment   Exclusions for Court-Ordered Treatment	Cortification Requirements			Anesthesia		
Coding Edits   Concurrent Review   Disease Management   Dosage limits   Employee Assistance Program requirements   Exclusions for Court-Ordered Treatment   Exclusions for Court-Ordered Treatment	Certification Requirements			Audiology Se	rvices	
Concurrent Review         Disease Management         Dosage limits         Employee Assistance Program requirements         Exclusions for Court-Ordered Treatment         Exclusions for Court-Ordered Treatment         Obsequence	Coding Edits			Cardiac Rena	D	
Disease Management       Cincuncision         Dosage limits       Cincuncision         Employee Assistance Program requirements       Cosmetic Surgery         Exclusions for Court-Ordered Treatment       Dental Services         Image: Comparison of Court-Ordered Treatment       Dental Services         Image: Comparison of Court-Ordered Treatment       Dental Services         Image: Comparison of Court-Ordered Treatment       Dental Services         Image: Court-Ordered Treatment       Dental Services         Image: Court-Ordered Treatment       Citation	Concurrent Review			Chiropractic	Services	
Dosage limits     Clinic Visits       Employee Assistance Program requirements     Cosmetic Surgery       Exclusions for Court-Ordered Treatment     Dental Services       Committeeur Services     Citation	Disease Management		_	Circumcision		
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Exclusions for Court-Ordered Treatment	Employee Assistance Program requirements			Cosmetic Sur	gery	
Exclusions for Court-Ordered Treatment				<ul> <li>Dental Service</li> </ul>	es	
6 Document Citation	Exclusions for Court-Ordered Treatment		•	Dormatology	Convicor	
Add Decument				6 -	Document	Citation

- 1. Select the **NQTLs** section in the product line navigation bar.
- 2. Select the **Apply Benefits to NQTL** tab.
- 3. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 4. Select the appropriate benefit category tab.
- 5. Select the NQTL for which you want to upload a response.
- 6. Click the down arrow to the right of the **Save** button.
- 7. Click **Add Document**. A pop-up window for the Document Manager will open. For instructions on how to add documents, see <u>Document Manager</u>.

Repeat the above steps for each identified NQTL, as appropriate.

## **Completion Check Marks**

Attaching a document automatically completes the NQTL in all relevant classifications and benefit categories. Check marks will display indicating that the NQTL is complete.



Demo Commercial Product Line					
Plan Information NQTLs	Factors Measures	Comparative Analysis Fi	ndings & Conclusions	Standards	
rovide your organization's list of identified NQTLs. This section our NQTLs, the other tabs and sections will be populated with	is comprised of three tabs. To c your list.	omplete, click on each tab anc	follow the instructions	provided in the shaded box. As	you identify
1. Identify NQTLs 🗸	, 2. Define	NQTLs	3. Apply Benefits to NC	<b>2</b> μΓ	
For each NQTL selected from the list, identify the applicable NOTE: Organizations may use the "List Manager" to upload a simultaneously.	fedical/Surgical and/or Mental l list of covered services and ass	Health/Substance Use Disorde ign Medical/Surgical or Menta	er covered service withir I. Health/Substance Use Mental Heal	n each classification and sub-cla : Disorder and classification/sub- th/Substance Us Medica	ssification. classification al/Surgical
In Network Inpatient Out of Network Inpatient			Add covered	service here	Add 🝷
In Network Outpatient - Other					Select A
NQT Out of Network Outpatient - Other		Covered Service			4
Gen 🗸 Out of Network Outpatient - Office Based		Acne			
Med Emergency Benefits		Acupuncture & Bio	feedback Service		
Out Prescription Drugs		Anesthesia			_
Pharmacy – Prior Authorization	_	Audiology Services	5		
Process for Assessment of New Technologies		Cardiac Rehab			
		Chemotherapy	05		
Retrospective review	_	Circumcision			
Service Limitations		Clinic Visits	Atta	ching a document	
Step therapy requirements		Cosmetic Surgery	Attu	automatically	
Treatment plan requirements		<ul> <li>Dental Services</li> </ul>	con	npletes the NQTL	
	•	Dormatology Sorvi		Chailen	- · · ·
		Save 🝷	Document	Citation	

#### **Custom Covered Services**

There are two ways to add custom services:

- Single benefits: Add custom covered services one at a time.
- **Benefit lists:** Create one or more lists of custom covered services and upload them in a spreadsheet or add manually. For instructions, see <u>List Manager</u>.

#### Single Benefits

Use this method to add custom covered services manually and without creating a list. Such custom services become available for selection under the specific benefit category and classification combination where you add the custom service. To make it available under additional combinations, see <u>To add category and classification</u> <u>combination(s) for a custom service</u>.

To add, edit or delete a custom service in single benefit mode, navigate to the **NQTLs** section and then select the **Apply Benefits to NQTL** tab.



## Select the appropriate NQTL, classification and benefit category.

## To add a custom service:

Demo Commercial Product Line					
Plan Information NC	TLs Factors	Measures	Comparative Analysis	Findings & Conclusions	Standards
Provide your organization's list of identified NQTLs. This se your NQTLs, the other tabs and sections will be populated	ction is comprised with your list.	of three tabs. To	o complete, click on each ta	b and follow the instructions p	provided in the shaded box. As you identify
1. Identify NQ	ΓLs	2. Defin	e NQTLs	3. Apply Benefits to NQT	n.
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In Network Outpatient - Office Based *				•	2
				Add covered s	ervice here
NQTL			Covered Servi	ce	▲
Application of Medical Necessity Criteria			Rural Health	Clinic	
Concurrent Review			Sterilization		
Medical Management - Disease Management			Targeted Case	Management Services	
Network Tier Design			Therapy - eva	luations	
Process for Assessment of New Technologies			Therapy - occ	upational	
Retrospective Review			Therapy - pat	hology	
Service Limitations			Therapy - phy	<sup>sical</sup> Custom ser	vices are denoted on
			Therapy - reh	abilitati the list v	with a pencil icon.
			Vaccines / Imr	ech	
			- vaccines/init		•
			Save 🔻	Document	Citation

- 1. Type the name of the custom service into the text box.
- 2. Click **Add**. Custom services will be displayed on the list in alphabetical order and denoted with a pencil icon.

#### To edit a custom service:

1. Under **Covered Service**, click the pencil icon next to the custom service that you want to edit.



Plan Information	NQTLs Factors	Measures	Comparative Analysis	Findings & Conclusions Stand	dards
ide your organization's list of identified NQTLs. T NQTLs, the other tabs and sections will be pop	his section is comprised llated with your list.	l of three tabs. To	o complete, click on each tal	o and follow the instructions provide	d in the shaded box. As you identify
1. Ident	ify NQTLs	2. Defin	e NQTLs	3. Apply Benefits to NQTL	
r each NQTL selected from the list, identify the <b>DTE:</b> Organizations may use the "List Manager" nultaneously. ssification Network Outpatient - Office Based <b>*</b>	applicable Medical/Surgi	ical and/or Menta	ıl Health/Substance Use Di ssign Medical/Surgical or M	sorder covered service within each cl ental Health/Substance Use Disorde Mental Health	lassification and sub-classification. er and classification/sub-classificatic /Substance Use Medical/Surgic
				Add covered service l	
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NQTL			Covered Servi		Selec
NQTL Application of Medical Necessity Criteria			Covered Servi	ce	nere Add
NQTL Application of Medical Necessity Criteria Concurrent Review			Covered Servi Countrollary rice Rural Health C Sterilization	ce 1110	Not Applic
NQTL Application of Medical Necessity Criteria Concurrent Review Medical Management - Disease Management			Covered Service Covered Service Rural Health ( Sterilization Targeted Case	Ce Clinic Management Services	Not Applic
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NQTL Application of Medical Necessity Criteria Concurrent Review Medical Management - Disease Management Network Tier Design Process for Assessment of New Technologies Retrospective Review			Covered Servi Rural Health C Sterilization Targeted Case Test Custom S Therapy - eva Therapy - occi Therapy - pat	Management Services iervice uations upational tology	Intere Add Selec Not Applic
NQTL Application of Medical Necessity Criteria Concurrent Review Medical Management - Disease Management Network Tier Design Process for Assessment of New Technologies Retrospective Review Service Limitations			Covered Servi Rural Health C Sterilization Targeted Case Test Custom S Therapy - eva Therapy - occi Therapy - patl Therapy - phy Therapy - reh:	ce Management Services lervice utations upational hology sical abilitative (20 and under)	Intere Add
NQTL Application of Medical Necessity Criteria Concurrent Review Medical Management - Disease Management Network Tier Design Process for Assessment of New Technologies Retrospective Review Service Limitations			Covered Servi Rural Heatth C Sterilization Targeted Case Test Custom S Therapy - eva Therapy - occi Therapy - pat Therapy - reha Therapy - reha Therapy - reha	ce Management Services iervice uuations upational nology sical abilitative (20 and under) ech	Intere Add

- 2. In the Manage Benefits pop-up window, make the necessary updates to the name in the Benefit Name field.
- 3. Click Save Changes.

age Benefits			>
Sin	gle Benefit Benefit Lists		
2 Benefit name Test Custom Service			
	Mental Health/Substance Use	Medical/Surgical	
In Network Inpatient			
Out of Network Inpatient			
In Network Outpatient - Other			
In Network Outpatient - Office Based			
Out of Network Outpatient - Other			
Out of Network Outpatient - Office Based			
Emergency Benefits			
Prescription Drugs		- 3	
		Delete Benefit Save chan	ges



To add category and classification combination(s) for a custom service:

1. Under **Covered Service**, click the pencil icon next to the custom service that you want to edit.

Demo Commercial Product Line	
Plan Information NQTLs Factors Measures C	omparative Analysis Findings & Conclusions Standards
Provide your organization's list of identified NQTLs. This section is comprised of three tabs. To cor your NQTLs, the other tabs and sections will be populated with your list.	nplete, click on each tab and follow the instructions provided in the shaded box. As you identify
1. Identify NQTLs 2. Define NO	QTLs 3. Apply Benefits to NQTL
For each NQTL selected from the list, identify the applicable Medical/Surgical and/or Mental He NOTE: Organizations may use the "List Manager" to upload a list of covered services and assign simultaneously.	ealth/Substance Use Disorder covered service within each classification and sub-classification. n Medical/Surgical or Mental Health/Substance Use Disorder and classification/sub-classification
Classification In Network Outpatient - Office Based マ	Mental Health/Substance Use Medical/Surgical
	Add covered service here
	Select All
NQTL	Covered Service
Application of Medical Necessity Criteria	Rural Health Clinic
Concurrent Review	Sterilization
Medical Management - Disease Management	Targeted Case Management Services
Network Tier Design	Test Custom Service
Process for Assessment of New Technologies	Therapy - occupational
Retrospective Review	Therapy - pathology
Service Limitations	Therapy - physical
	Therapy - rehabilitative (20 and under)
	Therapy - speech
	Vaccines / Immunizations
	Save   Document Citation

- 2. In the Manage Benefits pop-up window, click the check box for each additional category and classification combination where you want the custom service to be available for selection.
- 3. Click Save Changes.

ge Benefits			
	Si	ngle Benefit Ests	
	Benefit name Test Custom Service		
		Mental Health/Substance Use	Medical/Surgical
In Network Inpatient			
Out of Network Inpatien	t.	20	0
In Network Outpatient -	Other		0
In Network Outpatient -	Office Based		
Out of Network Outpatie	ent - Other	-	0
Out of Network Outpatie	ant - Office Based	0	-
Emergency Benefits		Current estadem and electificati	
Prescription Drugs	Category and classification combinations to be added	combination (i.e. the custom serv was added here)	vice Delete Benefit Save ch



## To delete a custom service:

1. **Under Covered Service**, click the pencil icon next to the custom service that you want to delete.

Plan Information	NQTLs	Factors	Measures	Comparative Analysis	Findings & Conclusions	Standards	
ide your organization's list of identified NQTLs. T NQTLs, the other tabs and sections will be popu	his section is Ilated with yo	comprised o	of three tabs. To	o complete, click on each tal	and follow the instructions p	rovided in the shade	ed box. As you identify
1. Identi	fy NQTLs		2. Defin	e NQTLs	3. Apply Benefits to NQT	L	
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					Add covered se	ervice here	Add
					Add covered se	ervice here	Add
				C	Add covered se	ervice here	Add Sele
NQTL				Covered Servi	Add covered se	ervice here	Add Sete
NQTL Application of Medical Necessity Criteria				Covered Servi	Add covered se se nau	ervice here	Add
NQTL Application of Medical Necessity Criteria Concurrent Review				Covered Servi Countries inte Rural Health ( Sterilization	Add covered so	arvice here	Add
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NOTL Application of Medical Necessity Criteria Concurrent Review Medical Management - Disease Management Network Tier Design Process for Assessment of New Technologies Retrospective Review Service Limitations				Covered Servi Rural Health ( Sterilization Targeted Case Test Custom S Therapy - eva Therapy - eva Therapy - pat Therapy - phy Therapy - rehn Therapy - spe	Add covered so Add covered so Tensor Management Services ervice uations upational hology sical sibilitative (20 and under) ech	arvice here	Add Sele Not Appl

2. In the Manage Benefits pop-up window, click **Delete Benefit**.

	Single Benefit	Benefit Lists	
Benefit name Test Custom Service			
		Mental Health/Substance Use	Medical/Surgical
In Network Inpatient			
Out of Network Inpatient			
In Network Outpatient - Other			
In Network Outpatient - Office Based			5
Out of Network Outpatient - Other		D	
Out of Network Outpatient - Office Based		0	
Emergency Benefits		0	
Prescription Drugs		0	

3. In the **Are You Sure** pop-up window, click **Confirm** to verify intent.



	Single Benefit Benefit Lists	
Benefit name Test Custom Ser	rice	
		Medical/Surgical
In Network Inpatient		
Out of Network Inpatient		
In Network Outpatient - Other		
In Network Outpatient - Office Based	Are you Cure?	<b>2</b>
Out of Network Outpatient - Other	Are you Sure?	
Out of Network Outpatient - Office Based	Are you sure you want to delete the benefit "Test	
Emergency Benefits	Custom Service"? It will be removed from any	
	responses where it was used.	

#### List Manager

Organizations may want to upload a spreadsheet with a custom list of covered services. Benefits offered by an organization's plan may vary between classifications and/or the different MH/SUD and medical/surgical. Because these lists may be large, creating separate lists and uploading the benefits into the system is possible using the List Manager.

A default list of benefits is available for selection within the **Apply Benefits to NQTL** sub-section in the **NQTLs** section. If an organization does not find the default list suitable for their needs, they can upload a list of their benefits and create relationships to the benefit classifications and benefit categories.

#### To use the List Manager:

- 1. Select the **NQTLs** section in the navigation bar for the product line to which you want to upload the benefits.
- 2. Select the Apply Benefits to NQTL tab.
- 3. Click the down arrow to the right of the Add button.
- 4. Select the List Manager option in the dropdown.



Plan Informatio  Plan Informatio Plan I					
Plan Information NQTLs Fectors Measures Comparative Analysis Findings & Conclusions Standards   our organization's list of identified NQTLs. This section is comprised of three tabs. To complete, click on each tab and follow the instructions provided in the shaded box. As you identified to NQTL solected from the list, identify NQTLs   1. Identify NQTLs 2. Define NQTL 3. Apply Benefits to NQTL <td>emo Commercial Product Line</td> <td></td> <td></td> <td></td> <td></td>	emo Commercial Product Line				
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1. Identity NQTLs     2. Define NQT     2. Apply Benefits to NQTL       ch NQTL selected from the list, identify the applicable Medical/Surgical and/or Mental Health/Substance Use Disorder covered service within each classification and sub-classification     Mental Health/Substance Use Disorder and classification/sub-classification       totom     more Covered service and assign Medical/Surgical or Mental Health/Substance Use Disorder and classification/sub-classification       totom     Mental Health/Substance Use     Mental Health/Substance Use       totom     Add covered service here     Image: Covered Service here       in toto Office Based *     Add covered Service here     Image: Covered Service here       kation Requirements     Image: Covered Service     Image: Covered Service here       in dedical Management.     Image: Covered Service     Image: Covered Service here       in dedical Management.     Image: Covered Service here     Image: Covered Service here       in dedical Management.     Image: Covered Service here     Image: Covered Service here       in dedical Management.     Image: Covered Service here     Image: Covered Service here       in dedical Management.     Image: Covered Service here     Image: Covered Service here       in dedical Management.     Image: Covered Service here     Image: Covered Service here       in dedical Management.     Image: Covered Service here     Image: Covered Service here       in dedicovered Service Program req	ide your organization's list of identified NQTLs. This section is comprised of three tabs. To NQTLs, the other tabs and sections will be populated with your list.	o complete, click or	each tab and follo	w the instructions provided in	the shaded box. As you identify
ch NQTL selected from the list, identify the applicable Medical/Surgical and/or Mental Health/Substance Use Disorder and classification and sub-classification a	1. Identify NQTLs 2. Defin	ne NQTLs 2	3. Ар	oly Benefits to NQTL	
tion       Mental Health/Substance Use       Medical/Surgical         Add covered service here       3         4 dd covered service here       4         4 dd covered service here       4         1       Covered Service       1         iration for Medical Necessity       Ativan - to 4 mg       1         and Medical Management       Behavioral Health Screening       1         ing Edits       Bridge Appointments       1         ang Management       Corprehensive Diagnostic Assessment       1         inge limits       Concurrent Case Mgmt       1         ions for Court-Ordered Treatment       Diazepam-to 5 mg       1         ions for Court-Ordered Treatment       Diazepam-to 5 mg       1	each NQTL selected from the list, identify the applicable Medical/Surgical and/or Menta <b>/TE:</b> Organizations may use the "List Manager" to upload a list of covered services and as jultaneously.	al Health/Substanc Issign Medical/Surg	e Use Disorder cove ical or Mental Heal	ered service within each class th/Substance Use Disorder ar	ification and sub-classification. nd classification/sub-classification
Add covered service here       3         Add covered service here       4         Add covered service here       4         Add covered service here       6         Add covered service here       6         Add covered service here       6         Behavioral Health Screening       8         Behavioral Modification       8         Behavioral Health Screening       8         Behavioral Health Screening       8         Chorpromazin HCL - to 50 mg       6         Concurrent Case Mgmt       6         DiazepamHydroxyzine HCL - to 25	ssification Network Outpatient - Office Based ▼			Mental Health/Sub	bstance Use Medical/Surgical
List Not Application List Covered Service Ativan - to 4 mg Ativan - to 4 mg Ativan - to 4 mg Behavioral Health Screening Behavioral Modification Behavioral Modification Behavioral Modification Benztropine - to 1 mg Bridge Appointments Bridge Appointments Comprehensive Diagnostic Assessment Concurrent Case Mgmt Consert Case Mgmt Diazepam - to 5 mg Diazepam - to 5 mg Diazepam-Hydroxyzine HCL - to 25 mg				Add covered service here	3
L       Covered Service       Image: Covered Service         Itation for Medical Necessity       Ativan - to 4 mg       Image: Covered Service         a and Medical Management       Behavioral Health Screening       Behavioral Health Screening         ification Requirements       Behavioral Modification       Behavioral Modification         ification Requirements       Benztropine - to 1 mg       Benztropine - to 5 mg         ige limits       Covered Service       Covered Service         isons for Court-Ordered Treatment       DiscepamHydroxyzine HCL - to 25 mg         Store       Doument       Citation					
ativan - to 4 mg   a divedical Naccessity   a divedical Management   ification Requirements   ing Edits   current Review   ase Management   age limits   loyee Assistance Program requirements   sions for Court-Ordered Treatment     Store     Document     Concurrent Case Mgmt   Discoperations of Court-Ordered Treatment     Store     Document     Ciristion	QTL	<ul> <li>Cover</li> </ul>	ed Service		
a and Medical Management     ification Requirements     ing Edits     current Review     ase Management     age limits     toyee Assistance Program requirements     sions for Court-Ordered Treatment     concurrent Case Mgmt     Diazepam-Hydroxyzine HCL - to 25 mg     Diazepam-Hydroxyzine HCL - to 25 mg     Diazepam-Hydroxyzine HCL - to 25 mg	plication for Medical Necessity	Ativar	n - to 4 mg		
ification Requirements   ing Edits   uurrent Review   ase Management   age limits   toyee Assistance Program requirements   isions for Court-Ordered Treatment	e and Medical Management	Behav	vioral Health Screer	iing	
Benztropine - to 1 mg     Chlorpromazin HCL - to 50 mg     Comprehensive Diagnostic Assessment     Concurrent Case Mgmt     Crisis Management     Diazepam + to 5 mg     Diazepam Hydroxyzine HCL - to 25 mg     Diazepam Hydroxyzine tCL - to 25 mg		Behav	vioral Modification		_
Ing Edits  Larrent Review  ase Management  age limits  Loyee Assistance Program requirements  Loyne Assistance Program requirements  Loyne Assistance Program requirements  Loyne Assistance Drogram - to 5 mg  DiazepamHydroxyzine HCL - to 25 mg  DiazepamHydroxyzine tCL - to 25 mg  Di	runcation Requirements	Benzt	ropine - to 1 mg		
current Review     ChitOrpromazin HCL - to 50 mg       ase Management     Concurrent Case Mgmt       age limits     Crisis Management       toyee Assistance Program requirements     Diazepam - to 5 mg       usions for Court-Ordered Treatment     DiazepamHydroxyzine HCL - to 25 mg       Save     Document	ding Edits	Bridge	e Appointments	0	
ase Management  age limits  loyee Assistance Program requirements  usions for Court-Ordered Treatment  Save Document As a sessment  Diazepam - to 5 mg  DiazepamHydroxyzine HCL - to 25 mg  DiazepamHydroxyzine JC - to 25 mg  DiazepamHydroxyzine JC - to 25 mg  DiazepamHydroxyzine HCL	oncurrent Review	Chlor	promazin HCL - to s	is Assessment	
age limits Loyee Assistance Program requirements usions for Court-Ordered Treatment USAN Concurrence and the set of the s	Disease Management	Comp	renensive Diagnost	ic Assessment	
loyee Assistance Program requirements Usions for Court-Ordered Treatment Usions for Co	Dosage limits	Crisis	Management		
usions for Court-Ordered Treatment	mplayaa Assistance Program requirements	Diaze	pam - to 5 mg		
usions for Court-Ordered Treatment	mproyee Assistance Program requirements	Diaze	pamHydroxyzine H	CL - to 25 mg	
Save  Document Citation	Exclusions for Court-Ordered Treatment	Dipha	nhydramino - to 50	<i>a</i>	
Document		Save_	Docu	iment	Citation

5. The Manage Benefits pop-up window will display.

Vanage Benefits					
	Single Benefit	Benefit Lists			
		+		Mental Health/Substance Use	Medical/Surgical
Choose List	~	Delete List	In Network Inpatient		
			Out of Network Inpatient		
			In Network Outpatient - Other		
			In Network Outpatient - Office Based		
			Out of Network Outpatient - Other		
			Out of Network Outpatient - Office Based		
			Emergency Benefits		
			Prescription Drugs		
					Save

6. In the Manage Benefits window, click the green + icon in the top middle of the screen.



lanage	Benefits					
		Single Benefit	Benefit Lists			
			+		Mental Health/Substance Use	Medical/Surgical
	Choose List	~	Delete List	In Network Inpatient		
				Out of Network Inpatient		
				In Network Outpatient - Other		
				In Network Outpatient - Office Based		
				Out of Network Outpatient - Other		
				Out of Network Outpatient - Office Based		
				Emergency Benefits		
				Prescription Drugs		
						Save

7. The Create List box now turns into an input box to give your list a name. Enter the name of your list.

**Note:** This name is an internal reference to remember what the list contains. It will not be displayed anywhere outside the List Manager.

Manage Benefits					×
Single Benefit	Benefit Lists				
	0		Mental Health/Substance Use	Medical/Surgical	
	Create List	In Network Inpatient			
		Out of Network Inpatient			
		In Network Outpatient - Other			
		In Network Outpatient - Office Based			
		Out of Network Outpatient - Other			
		Out of Network Outpatient - Office Based			
		Emergency Benefits			
		Prescription Drugs			
				Save	

8. After you have entered the name of your list, click **Create List**.



		6.11.		
	Single Benefit Bene	fit Lists		
		$\otimes$	Mental Health/Substan Use	ice Medical/Surgica
Test Custom List	Create	e List In Network Inpatient		
		Out of Network Inpatient		
		In Network Outpatient - Other		
		In Network Outpatient - Office Based		
		Out of Network Outpatient - Other		
		Out of Network Outpatient - Office Based		
		Emergency Benefits		
		Prescription Drugs		

9. After you have created the list, two more icons will display. The upload icon is for uploading an Excel spreadsheet with your benefits. The plus icon allows you to add one benefit at a time to the list.

r Manage Benefit	s					×
	Single Benefit	Benefit Lists				
		+		Mental Health/Substance Use	Medical/Surgical	
Test Cus	om List v	Delete List	In Network Inpatient			
			Out of Network Inpatient			
		<u>↑</u> +	In Network Outpatient - Other			
			In Network Outpatient - Office Based			
			Out of Network Outpatient - Other			
			Out of Network Outpatient - Office Based			
			Emergency Benefits			
			Prescription Drugs			
					Save	

10. To upload the file with your benefits, click the upload icon, shown in red in the screenshot. The file must be in Excel and contain the benefits in the first column of the spreadsheet.



	Single Benefit Benefit	it Lists		
		+	Mental Health/Substa	ance
Test Custom List	✓ Delete	List In Network Inpatient	Use	Medical/Surgica
		Out of Network Inpatient		
	1	In Network Outpatient - Other		
		Upload Excel sheet of benefits (first	column)	
		Out of Network Outpatient - Other		
		Out of Network Outpatient - Office Based		
		Emergency Benefits		
		Prescription Drugs		

11. On your computer, select the appropriate Excel file and click **Open**.

Open								
← → → ↑ 🗖 > This PC >	Desktop				ن v	Search Desktop		9
Organize • New folder						3	II • 1	
1.0.1	Name	Status	Date modified	Туре	Size			
Cuick access	Test Custom Benefits List	0	3/22/2024 4:19 PM	Microsoft Excel Work.	9 KB			
OneDrive - URAC	Test Files	0	3/22/2024 3:23 PM	File folder	5000 AP.			
URAC								
🗩 This PC								
3D Objects								
Desktop								
1 Documents								
Downloads								
b Music								
Notures								
🔚 Videos								
😆 Windows (C:)								
Network								
a neurona								
File name: Test	Custom Renefite List				~	Microsoft Evcel	Vorksheet	e S
The norme. These	Sandon on the tax and					interestore Excert		
						Open	Ca	uncel

12. The benefits imported from your Excel file will display in the Benefit table.



	Single Benefit	Benefit Lists			
		+		Mental Health/Substance Use	Medical/Surgica
Test Custom List	~	Delete List	In Network Inpatient		
			Out of Network Inpatient		
		<u>+</u>	In Network Outpatient - Other		
Benefit			In Network Outpatient - Office Based		
Bioteedback Family Psycho-Educational Therapy			Out of Network Outpatient - Other		
Family Therapyoutpatient		1 I I	Out of Network Outpatient -		
Group therapyoutpatient		Ť	Office Based		
Health Behavior Assessment		<b>1</b>	Emergency Benefits		
Health Behavior Reassessment		Ť.	Prescription Drugs		
Individual therapyoutpatient		Ť			
Intensive outpatient (IOP)		Ť.			
Mental health assessment		T I			
Mental health reassessment		1			
Multiple family group therapy		î			
Partial hospitalization (PHP)		î î			
Psychiatric Rehabilitation Services		î			
Psychological or neuropsychological testing and evaluation		Ť			
Therapeutic Behavioral Services					

13. The table on the right half of the List Manager allows you to identify where these benefits should be available as an option for users to select. You may have a very long list that can apply to every classification or you want to make several lists so only relevant benefits are displayed as you navigate the different classifications. The lists you create within the List Manager do not automatically indicate that benefits apply to those classifications. These benefits are made *available* within those classifications for selection under the **Apply Benefits to NQTL** sub-section in the **NQTLs** section.

Click the checkboxes for the category and classification combinations where you want the benefits to be available for selection under the **Apply Benefits to NQTL** sub-section.



		Single Benefit	Benefit Lists			
			+		Mental Health/Substance Use	Medical/Surgic
Test Custom List		~	Delete List	In Network Inpatient		
				Out of Network Inpatient		
			_↑_+	In Network Outpatient - Other		
Benefit				In Network Outpatient - Office Based		
Biofeedback Family Psycho-Educational Therapy				Out of Network Outpatient - Other		
Family Therapyoutpatient				Out of Network Outpatient -		
Group therapyoutpatient				Office Based		
Health Behavior Assessment			ĩ	Emergency Benefits		
Health Behavior Reassessment			i i	Prescription Drugs		
Individual therapyoutpatient						
Intensive outpatient (IOP)						
Mental health assessment			Î			
Mental health reassessment			Ť			
Multiple family group therapy			Î			
Partial hospitalization (PHP)			Ĩ			
Psychiatric Rehabilitation Services			Ť			
Psychological or neuropsychological testing and evaluation	tion		Î			
Therapeutic Behavioral Services						

#### 14. When finished, click **Save**.

You can reopen any previous list of benefits in the List Manager at any point to add or delete benefits, as desired.

#### **Factors**

The **Factors** section is used to identify factors, provide factor definitions, sources, and any evidentiary standards for each NQTL identified in the **Identify NQTLs** sub-section. The **Identify NQTLs** sub-section *must* have the applicable NQTL, classification and benefit category selected as a prerequisite for completing the **Factors** section.

Organizations may use the default lists of factors, sources, and evidentiary standards available in the **Factors section** or add their custom items. For information about adding custom items, see <u>Custom Items</u>.

The Factors section is comprised of three sub-sections:



emo Commercial Product Line				
Plan Information NQTI	s Factors Measures Comparative Analysis	Findings & Conclusions	Standards	
1. Identify Factors	2 2. Define Factors	3. Sources & Evidentiary Stand	dards	
Jentify all of the factors considered in the decision of whet enefits within the same classification. Apply to all Classifications	her or not to apply this NQTL type to a particular benefit	. Identify all the factors, includ	ling if different factors are used for al Health/Substance Use Medi	r different ical/Surgica
assification Network Outpatient - Office Based *				
NQTL			Add Factor here	Ade
Application for Medical Necessity		Relied Upon	Considered (Not Relied	i Upon)
Case and Medical Management	Select All	0	0	
Certification Requirements	Accreditation	D		
Coding Edits	Adjustments for non-M.D. providers			
Concurrent Review	Admitting privileges	D		
	Benchmarking to claims databases	0		
Disease Management				
Disease Management Dosage limits	such as FAIR Health rates			
Disease Management Dosage limits Employee Assistance Program requirements	such as FAIR Health rates	.0	0	

- 1. **Identify Factors** is for identifying factors considered and/or relied upon when applying NQTLs to applicable benefits and classifications
- 2. **Define Factors** is for defining each factor
- 3. **Sources & Evidentiary Standards** is for providing the source(s) and any evidentiary standard(s) used to define the factors

# **Identify Factors**

## **To identify factors:**

	Plan Information NQTLs	Factors Measures Comparative Analysi	s Findings & Conclusions	Standards
	2 1. Identify Factors	2. Define Factors	3. Sources & Evidentiary Stand	lards
Identify all of benefits withi	the factors considered in the decision of whether on the same classification.	r not to apply this NQTL type to a particular benef	it. Identify all the factors, includ	ing if different factors are used for different
Out of Networ	Lassincations		5 Menta	I Health/Substance Use Medical/Surgica
NQTL	In Network Inpatient			Add Factor here Ad
Fail-first Pro	Out of Network Inpatient		Relied Upon	Considered (Not Relied Upon)
Formulary D	In Network Outpatient - Other	Select All	Ξ	Θ
Geographic	Out of Network Dutpatient - Other	Severity or chronicity of an illness	2	0
Medical Nec	Out of Network Outpatient - Office Based	Site visit requirements	6	0
Network Tie	Emergency Benefits Prescription Drugs	Specialty-specific accreditation requirements	•	



- 1. Select the **Factors** section in the product line navigation bar.
- 2. Select the Identify Factors tab.
- 3. Select the NQTL for which you want to identify factors.
- 4. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 5. Select the appropriate benefit category tab.
- 6. In the **Relied Upon** and **Considered (Not Relied Upon)** columns, click the check box corresponding to each applicable factor.
- 7. Click Save.

Repeat the steps above for each identified NQTL, benefit category and classification.

**Note:** Only the classifications relevant to the selected NQTL, based on responses saved in the **Identify NQTLs** sub-section, will display as clickable in the **Classification** dropdown. Other classifications will be grayed out. The screenshot below shows an example.

	Plan Information NC	QTLs Factors Measures Comparative	Analysis Findings & Conclusions	Standards
	1. Identify Facto	2. Define Factors	3. Sources & Evidentiary Stanc	lards
Identify all of the factors benefits within the same Apply to all Classificati	; considered in the decision of wl e classification. ons	hether or not to apply this NQTL type to a particula	ar benefit. Identify all the factors, includ	ing if different factors are used for different factors are used for different factors are used for different f
Out of Network Inpatient	i <b>*</b>	Classifications relevant	t for the selected	
NQTL In Netwo	ork Inpatient	Irrelevant classification	ckable. ns are grayed out.	Add Factor here
NQTL In Netwo Fail-first Pro	ork Inpatient letwork Inpatient	Irrelevant classification	ckable. ns are grayed out. Relied Upon	Add Factor here Considered (Not Relied Upon
NQTL In Netwo Fail-first Pro Formulary D In Netwo	ork Inpatient letwork Inpatient ork Outpatient - Other ork Outpatient - Office Based	Irrelevant classification	ckable. ns are grayed out. Relied Upon	Add Factor here Considered (Not Relied Upon
NQTL In Netwo Fail-first Pro Formulary D In Netwo Geographic Out of N	ork Inpatient Ietwork Inpatient ork Outpatient - Other ork Outpatient - Office Based Ietwork Outpatient - Other	Select All Severity or chronicity of an illness	ckable. ns are grayed out. Relied Upon —	Add Factor here Considered (Not Relied Upon
NQTL In Netwo Fail-first Pro Formulary D In Netwo Geographic Out of N Medical Net	ork Inpatient letwork Inpatient ork Outpatient - Other ork Outpatient - Office Based letwork Outpatient - Other letwork Outpatient - Office Base	Select All Severity or chronicity of an illness	ckable. ns are grayed out. Relied Upon - Z	Add Factor here Considered (Not Relied Upon
NQTL         In Network           Fail-first Pre         Out of N           Formulary D         In Network           Geographic         Out of N           Medical Nee         Out of N           Network Tie         Prescrip	ork Inpatient letwork Inpatient ork Outpatient - Other ork Outpatient - Office Based letwork Outpatient - Other letwork Outpatient - Office Base rcy Benefits tion Drugs	Select All     Severity or chronicity of an illness     Site visit requirements     Specialty-specific accreditation     requirements	ckable. ns are grayed out. Relied Upon C C C C C C C C C C C C C C C C C C C	Add Factor here Considered (Not Relied Upon
NQTL         In Network           Fail-first Preference         Out of N           Formulary D         In Network           Geographic         Out of N           Medical Net         Out of N           Prescrip         Prescrip           Pharmacy – Wedical Network Te         Prescrip	ork Inpatient letwork Inpatient ork Outpatient - Other ork Outpatient - Office Based letwork Outpatient - Other letwork Outpatient - Office Base ncy Benefits tion Drugs accessity	Select All     Severity or chronicity of an illness     Ste visit requirements     Specialty-specific accreditation     requirements     Supply of providers	ckable. ns are grayed out. Relied Upon	Add Factor here Considered (Not Relied Upon

**Note:** Only the benefit categories relevant to the selected NQTL, based on responses saved in the **Identify NQTLs** sub-section, will display as clickable tabs. The screenshot below shows an example.



Ρ	lan Information	NQTLs	Factors Measures Comparative Ar	nalysis Findings & Conclusions	Standards
	1. Identify	Factors	2. Define Factors	3. Sources & Evidentiary Standar	ds
entify all of the factors consider nefits within the same classific	red in the decision ation.	of whether o	or not to apply this NQTL type to a particular l	benefit. Identify all the factors, including	g if different factors are used for diff
only to all Classifications					Inalith/Cubatanan Line Mariani/
ppty to all classifications				Mental F	realth/Substance Use Medical/
issification t of Network Outpatient - Offic	e Based 🔻				Health/Substance Use Medical/
issification it of Network Outpatient - Offic	e Based 🔻	_	The t relev	tab is grayed out as the benefit cr	ategory is not lassification.
issification it of Network Outpatient - Offic NQTL Formulary Design	e Based 🔻	<b>^</b>	The t relev	ab is grayed out as the benefit c	ategory is not lassification.
ssification stification NQTL Formulary Design Geographic Restrictions	e Based ▼	<b>^</b>	The t relev	ab is grayed out as the benefit c vant for the selected NQTL and c Relied Upon	ategory is not lassification. Considered (Not Relied Up
sification solication NQTL Formulary Design Geographic Restrictions Medical Necessity Criteria	e Based 🔻	•	The t relev	ab is grayed out as the benefit c vant for the selected NQTL and c Relied Upon	ategory is not lassification. Considered (Not Relied Up
sification solication NQTL Formulary Design Geographic Restrictions Medical Necessity Criteria Network Tier Design	e Based ▼	•	The t relev Select All Accreditation	Relied Upon	ategory is not lassification. Considered (Not Relied Up
sification solication NQTL Formulary Design Geographic Restrictions Medical Necessity Criteria Network Tier Design	e Based 🔻		The t relev Select All Accreditation Adjustments for non-M.D. providers	Relied Upon	ategory is not lassification. Considered (Not Relied Up
sification solication NQTL Formulary Design Geographic Restrictions Medical Necessity Criteria Network Tier Design Pharmacy – Medical Necessity	e Based •		Select All         Accreditation         Adjustments for non-M.D. providers         Admitting privileges	Relied Upon	Ategory is not ilassification. Considered (Not Relied Up
sification t of Network Outpatient - Offic NQTL Formulary Design Geographic Restrictions Medical Necessity Criteria Network Tier Design Pharmacy – Medical Necessity Process for Assessment of Ne	e Based 🔻		Select All         Accreditation         Adjustments for non-M.D. providers         Admitting privileges         Benchmarking to claims databases	Relied Upon	Ategory is not lassification. Considered (Not Relied Up
An execution is a set of the execution is a	e Based <b>v</b>		The t relevant Select All Accreditation Adjustments for non-M.D. providers Admitting privileges Benchmarking to claims databases such as FAIR Health rates	Relied Upon	Ategory is not lassification. ere Considered (Not Relied Up

**Optional:** To save the same factor selections to all relevant classifications at once, select the **Apply to all Classifications** check box after selecting applicable factor(s) and click **Save**.

Plan Int Identify all of the factors considered in benefits within the same classification. Apply to all Classifications Classification Out of Network Outpatient - Office Base	formation NQTLs  1. Identify Factors the decision of whether	Factors	Measures 2. Define Facto	Comparative Analys	rsis Findi 3. Sources efit. Identify a	ings & Conclusions s & Evidentiary Stan all the factors, incluc	Standards dards ding if different fa	actors are used for dif	ferent
Identify all of the factors considered in benefits within the same classification. Apply to all Classifications Classification Out of Network Outpatient - Office Base	1. Identify Factors	r or not to app	2. Define Facto	ors e to a particular bene	3. Sources	s & Evidentiary Stan	dards ding if different fa	actors are used for dif	ferent
Identify all of the factors considered in benefits within the same classification. Apply to all Classifications Classification Out of Network Outpatient - Office Base	the decision of whether	r or not to app	oly this NQTL type	e to a particular bene	efit. Identify a	all the factors, incluc	ding if different fa	actors are used for dif	ferent
Classification Out of Network Outpatient - Office Base									
NOTI	ed •					Menta	al Health/Substa	ance Use Medical,	/Surgical
<ul> <li>Formulary Design</li> </ul>					-	Colled Lines	Canal	idered (Net Delied II)	
Geographic Restrictions					r	celled Opon	Consi		on)
Medical Necessity Criteria		Sele	ct All					=	
Network Tier Design		Valid Certi	I DEA or Controlle ficate or acceptab	ed Substance de substitute					
Pharmacy – Medical Necessity		Varia	bility in quality						
Process for Assessment of New Tec Provider Credentialing	chnologies	Whe	ther reimburseme rmined based on i	ent rates are internal or				<	
Retrospective Review		exter	mal data						
Service Limitations		Save							



# **Completion Check Marks**

## Identify Factors Sub-section

When at least one factor selection has been saved for an NQTL within a benefit category, a check mark will display in the corresponding category tab.

Demo Commercial Product Line			
Plan Information NQTLs	Factors Measures Comparative Analysis	s Findings & Conclusions	Standards
1. Identify Factors	2. Define Factors	3. Sources & Evidentiary Stand	ards
Identify all of the factors considered in the decision of whether o benefits within the same classification.	r not to apply this NQTL type to a particular benefi	it. Identify all the factors, includi	ng if different factors are used for different
Apply to all Classifications  Classification Out of Network Inpatient		Mental He	Medical/Surgical
NQTL			Add Factor here Add
Geographic Restrictions		Relied Upon	Considered (Not Relied Upon)
Medical Necessity Criteria	Select All	=	
Network Tier Design	Requirements for staff at facilities to be credentialed, in addition to the facility		
Pharmacy – Medical Necessity	Safety risks		0
Process for Assessment of New Technologies			
Provider Credentialing	Separate payments for managing a patient's care outside of face-to-face		
Retrospective Review	contact (e.g., care management)		v
Service Limitations	Save		
v			

When the factor selection has been completed for all relevant benefit categories within a classification, a check mark will display next to the corresponding classification in the **Classification** dropdown.



Plan Information	NOTI's Factors Measures Comparative Analysi	s Findings & Conclusions	Standards		
1. Identify Fac	ctors 2. Define Factors	3. Sources & Evidentiary Stand	lards		
entify all of the factors considered in the decision of whether or not to apply this NQTL type to a particular benefit. Identify all the factors, including if different factors are used for different nefits within the same classification.					
rt of Network Inpatient ▼ NQTL In Network Inpatient			Add Factor here		
xperiment: VOut of Network Inpatient		Relied Upon	Considered (Not Relied Upon)		
Fail-first Pro	Select All				
inflection outputteric office based	Accreditation				
ormulary D Out of Network Outpatient - Other					
Geographic Out of Network Outpatient - Other Geographic Out of Network Outpatient - Office Ba	Adjustments for non-M.D. providers				
Out of Network Outpatient - Other           Geographic         Out of Network Outpatient - Office Ba           Medical Net         Emergency Benefits	Adjustments for non-M.D. providers  Admitting privileges				
Out of Network Outpatient - Other           Geographic         Out of Network Outpatient - Office Ba           Medical Network Outpatient - Office Ba         Emergency Benefits           Prescription Drugs         Prescription Drugs	Adjustments for non-M.D. providers Admitting privileges Benchmarking to claims databases such as FAIR Health rates				

When the factor selection has been completed for all relevant benefit categories and classifications, a check mark will display next to the corresponding NQTL in the list on the left.

Demo Commercial Product Line						
Plan Information NQTLs	Factors Measures Comparative Analysi	s Findings & Conclusions	Standards			
1. Identify Factors	2. Define Factors	3. Sources & Evidentiary Standa	rds			
Identify all of the factors considered in the decision of whether or benefits within the same classification.	dentify all of the factors considered in the decision of whether or not to apply this NQTL type to a particular benefit. Identify all the factors, including if different factors are used for different senefits within the same classification.					
Apply to all Classifications		Mental Health	N/Substance Us Medical/Surgical			
Out of Network Inpatient   NQTL In Network Inpatient			Add Factor here Add			
Exper V Out of Network Inpatient		Relied Upon	Considered (Not Relied Upon)			
Fail-fi	Select All					
Formu Out of Network Outpatient - Other	Accreditation					
Geoge 🗸 Out of Network Outpatient - Office Based	Adjustments for non-M.D. providers					
Medic Emergency Benefits	Admitting privileges					
Netwo	Benchmarking to claims databases such as FAIR Health rates					
Pharmacy – Medical Necessity     Process for Assessment of New Technologies			- ·			
Provider Credentialing	Save					



When the factor selection has been completed for all applicable NQTLs, benefit categories and classifications, a check mark will display in the **Identify Factors** tab.

Demo Commercial Product Line			
Plan Information NQTLs	Factors Measures Comparative Analysis	Findings & Conclusions St	andards
1. Identify Factor	2. Define Factors	3. Sources & Evidentiary Standards	
Identify all of the factors considered in the decision of whether or benefits within the same classification.	r not to apply this NQTL type to a particular benefit	. Identify all the factors, including if	different factors are used for different
Apply to all Classifications     Classification     In Network Outpatient - Office Based <del>*</del>		Mental Health/Su	bstance Use 🗸 Medical/Surgical 🖌
NQTL			Add Factor here Add
✓ Application for Medical Necessity		Relied Upon	Considered (Not Relied Upon)
✓ Case and Medical Management	Select All		
✓ Certification Requirements	components		•
✓ Coding Edits	Health plan accreditation standards for quality assurance		
Concurrent Review     Disease Management	High levels of variation in length of stay		
✓ Dosage limits	High variability in cost per episode of		•
✓ Employee Assistance Program requirements	Savo		
✓ Exclusions for Court-Ordered Treatment	Jave		

## Define Factors Sub-section

When the definition entered into the text box has been saved for a factor, a check mark will display next to the corresponding factor.



Demo Commercial Product Line						
Plan Information NQTLs Factors Measures Comparative Analysis Findings & Conclusions Standards						
1. Identify Factors       2. Define Factors       3. Sources & Evidentiary Standards						
Provide a definition for each selected factor.						
NOTE: The same definition will be used for the same factor across the platform. If you use the same factor but it has a different definition, you are required to enter a new custom factor.						
	•					
Factor						
Adjustments for non-M.D. providers	1					
<ul> <li>Admitting privileges</li> </ul>						
Provider practice size						
✓ Recent medical cost escalation						
Recognition of accreditation by certain accrediting bodies						
Safety risks	L					
Severity or chronicity of an illness						
Site visit requirements						
<ul> <li>Valid DEA or Controlled Substance Certificate or acceptable substitute</li> </ul>						
Risk of drug or service; drugs or services, which, in the experience and judgment of the members of the utilization management committee present a higher risk of or number of adverse						
outcomes or events when compared to similar drugs, treatments, or services when alternatives are available.	1					
	- 11					
Save  Document Citation						

When the definitions have been entered and saved for all applicable factors, a check mark will display in the **Define Factors** tab.



Demo C	ommercial Product Line						
	Plan Information NQTLs Factors Measures Comparative Analysis Findings & Conclusions Standards						
	1. Identify Factors 2. Define Factor 3. Sources & Evidentiary Standards						
Provide NOTE:	e a definition for each selected factor. The same definition will be used for the same factor across the platform. If you use the same factor but it has a different definition, you are required to enter a new custom factor.						
	Factor						
~	Adjustments for non-M.D. providers						
~	Admitting privileges						
~	Provider practice size						
~	Recent medical cost escalation						
~	Recognition of accreditation by certain accrediting bodies						
~	Safety risks						
~	Severity or chronicity of an illness						
~	Site visit requirements						
~	Valid DEA or Controlled Substance Certificate or acceptable substitute						
Risk of outcom	drug or service; drugs or services, which, in the experience and judgment of the members of the utilization management committee present a higher risk of or number of adverse es or events when compared to similar drugs, treatments, or services when alternatives are available.						
Save	Document Citation						

Sources and Evidentiary Standards Sub-section

When the source and any evidentiary standard selections have been completed for all factors for an NQTL within a benefit category, a check mark will display in the corresponding category tab.



Demo Commercial Product Line	
Plan Information NQTLs	Factors         Measures         Comparative Analysis         Findings & Conclusions         Standards
1. Identify Factors	2. Define Factors
For each NQTL, select applicable factor(s) and provide approp whether and how the NQTL is applied to a particular benefit.	riate sources and applicable quantitative or qualitative evidentiary standard(s) that reflect an adequate basis for determining
Classification In Network Outpatient - Office Based -	Mental Health/Substance Use Medical/Surgical
NQTL	Apply to all Factors
Formulary Design	
Geographic Restrictions	Factor
Medical Necessity Criteria	Recent medical cost escalation
Network Tier Design	Safety risks
Pharmacy – Medical Necessity	Valid DEA or Controlled Substance Certificate or acceptable substitute
Process for Assessment of New Technologies	
Provider Credentialing	Add Source here Add
Retrospective Review	Source
Service Limitations	<ul> <li>Internal claims data showing that medical cost for certain services increased 10 percent or more per year for two years.</li> </ul>
	Internal market and competitive analysis
	Medical expert reviews
	Medicare physician fee schedules
	• Maria aktive 70 minina aktive antipada aktive antipada aktive kanna ika aktive aktive aktive aktive kanna ka Kanna kanna
	Save  Document Citation

When the source and any evidentiary standard selections have been completed for all relevant benefit categories within a classification, a check mark will display next to the classification in the **Classification** dropdown menu.



emo Commerci	al Product Line				
	Plan Information	IQTLs Factors Measures	Comparative Analysis	Findings & Conclusions St	andards
	1. Identify Fa	tors 2. Define F	actors 🗸	3. Sources & Evidentiary Standards	
or each NQTL, vhether and ho	select applicable factor(s) and provid ow the NQTL is applied to a particular	appropriate sources and applicab enefit.	le quantitative or qualitative	evidentiary standard(s) that reflect	an adequate basis for determining
lassification Network Outp	patient - Office Based <del>-</del>			Mental Health/Su	ostance Us Medical/Surgica
NQTL	In Network Inpatient				
Formulary D	Out of Network Inpatient		•		
Geographic	In Network Outpatient - Other		Factor		
Medical Nec	In Network Outpatient - Office Ba	ed 🗸	Admitting privileges		
Network Tie	Out of Network Outpatient - Other	sed			
vetwork the	Emergency Benefits	Jeu -			Add Source here Ad
Pharmacy –	Prescription Drugs	Source			
Process for 人		Source			
Provider Crede	entialing	years.	ata showing that medical co	st for certain services increased 10 p	ercent or more per year for two
Retrospective	Review	<ul> <li>Internal market a</li> </ul>	nd competitive analysis		
Service Limitat	tions	Medical expert re	Medical expert reviews		
		Medicare physicia	an fee schedules		
		No. 4 50		-£ £ :£!:	
		Save -	Document	Citation	
			o cament	Citation	

When the source and any evidentiary standard selections have been completed for all relevant benefit categories and classifications, a check mark will display next to the corresponding NQTL in the list on the left.



Demo Commercial Product Line		
Plan Information NQTLs	Factors Measures Comparative Analysis	Findings & Conclusions Standards
1. Identify Factors	2. Define Factors 🗸 3. S	Sources & Evidentiary Standards
For each NQTL, select applicable factor(s) and provide approp whether and how the NQTL is applied to a particular benefit.	riate sources and applicable quantitative or qualitative ev	identiary standard(s) that reflect an adequate basis for determining
Classification In Network Outpatient - Office Based -		Mental Health/Substance Use Medical/Surgice
NQTL In Network Inpatient Formu Out of Network Inpatient	Apply to all Factors	
In Network Outpatient - Other	Factor	
In Network Outpatient - Office Based	<ul> <li>Recent medical cost escalation</li> </ul>	
Medic Out of Network Outpatient - Other	✓ Safety risks	
Network Outpatient - Office Based	Valid DEA or Controlled Substance Cortificate	or accostable substitute
Pharn Emergency Benefits	Valid DEA of Controlled Substance Certificate	or acceptable substitute
Prescription Drugs Proces		
Provider Credentialing		Add Source here Add
Retrospective Review	Source	
Service Limitations	<ul> <li>Internal claims data showing that medical cost for years.</li> </ul>	or certain services increased 10 percent or more per year for two
	Internal market and competitive analysis	
	Medical expert reviews	
	Medicare physician fee schedules	
	· · ·	•
	Save   Document	Citation

When the source and any evidentiary standard selections have been completed for all NQTLs within all respective benefit categories and classifications, a check mark will display in the **Sources and Evidentiary Standards** tab.



Demo Commercial Product Line		
Plan Information NQTLs	Factors Measures Comparative Analysis Findings & Conclu	sions Standards
1. Identify Factors 🗸	2. Define Factors ✓ 3. Sources & Evidentiary	Standard V
For each NQTL, select applicable factor(s) and provide approp whether and how the NQTL is applied to a particular benefit.	riate sources and applicable quantitative or qualitative evidentiary standard(	;) that reflect an adequate basis for determining
Classification In Network Outpatient - Office Based -	Ment	al Health/Substance Use 🖌 Medical/Surgical 🔨
NQTL	Apply to all Factors	
✓ Formulary Design	Factor	
Geographic Restrictions	<ul> <li>Recent medical cost escalation</li> </ul>	
✓ Medical Necessity Criteria	✓ Safety risks	
✓ Network Tier Design	<ul> <li>Valid DEA or Controlled Substance Certificate or acceptable substance</li> </ul>	titute
<ul> <li>Pharmacy – Medical Necessity</li> </ul>		
<ul> <li>Process for Assessment of New Technologies</li> </ul>		Add Source here Add
<ul> <li>Provider Credentialing</li> </ul>	Saura	
✓ Retrospective Review	National accreditation standards	A
✓ Service Limitations ↓	Standards used by any committees of experts and required level of	qualifications of committee members
	State and Enderal requirements	quanications of committee members.
	State regulatory standards for health plan network adequary	
	Utilization is two standard deviations above average utilization per c	enisode of care
		-producion carea
	Save Document	Citation

## **Define Factors**

This sub-section has an option to attach documentation instead of adding the factor definitions manually in the interface. To use this option, see <u>Providing Factor Definition in Documentation</u>.

# To provide factor definitions:

	Plan Information NQTLs Factors Measures Comparative Analysis Findings & Conclusions	Standards
	1. Identify Factors 2. Define Factors 3. Sources & Evidentiary Standa	rds
rovide a definition for each OTE: The same definition	selected factor. vill be used for the same factor across the platform. If you use the same factor but it has a different definition, you are ri	equired to enter a new custom factor.
Factor		
High Cost Growth		
Market Dynamics		
Safety Risks		
Variation in Quality	of Care and Cost Delivered	
velate definition for factor	ere	



- 1. Select the **Factors** section in the product line navigation bar.
- 2. Select the **Define Factors** tab.
- 3. Select the factor for which you want to provide a definition.
- 4. Enter the definition into the text box.
- 5. Click Save.

**Note:** The same definition will be used for the same factor across the platform. If you use the same factor but it has a different definition, you are required to enter a new custom factor.

#### **Providing Factor Definition in Documentation**

#### To attach a document with a factor definition:

	Plan Information NQTLs Factors Measures Comparative Analysis Findings & Conclusions Standards	
	1. Identify Factors 2. Define Factors 3. Sources & Evidentiary Standards	
Provide NOTE: <sup>-</sup>	a definition for each selected factor. The same definition will be used for the same factor across the platform. If you use the same factor but it has a different definition, you are required to enter a new custom factor	
	Factor	
~	Adjustments for non-M.D. providers	
~	Admitting privileges	
~	Provider practice size	
~	Recent medical cost escalation	
~	Recognition of accreditation by certain accrediting bodies	
~	Safety risks	
	Severity or chronicity of an illness	
~	Site visit requirements	
~	Valid DEA or Controlled Substance Certificate or acceptable substitute	
Jpdate	definition for factor here	
_		

- 1. Select the **Factors** section in the product line navigation bar.
- 2. Select the **Define Factors** tab.
- 3. Select the factor for which you want to attach a document.
- 4. Click the down arrow to the right of the **Save** button.
- 5. Click **Add Document**. A pop-up window for the Document Manager will open. Attach the appropriate document(s). For instructions, see <u>Document Manager</u>.

After a document has been attached for a factor, a check mark will display next to the factor. The definition requirement is deemed complete for the factor.



## **Sources and Evidentiary Standards**

This sub-section has an option to attach documentation instead of making selections manually in the interface. To use this option, see <u>Uploading Documentation with Response</u>.

#### To provide factor source(s) and evidentiary standard(s):

	Plan Information	NQTLs Fac	tors Measures	Commenting Application		
	1 Identify Fa	_		Comparative Analysis	Findings & Conclusions	Standards
	1. Identity re	ctors	2. Define Fa	ictors 2 3.	Sources & Evidentiary Stand	lards
For each N whether a	NQTL, select applicable factor(s) and provide and how the NQTL is applied to a particular	e appropriate so benefit.	urces and applicable	quantitative or qualitative o	evidentiary standard(s) that r	eflect an adequate basis for determining
Classificatio In Networl	n k Outpatient - Office Based ▼				5 Mental H	ealth/Substance Use Medical/Surgical 🗸
NQTL	In Network Inpatient		Apply to all Eastern			
<ul> <li>Formu</li> </ul>	Out of Network Inpatient		Apply to all Factors			
✓ Geogr	aph In Network Outpatient - Other		Factor			
<ul> <li>Medica</li> </ul>	al N In Network Outpatient - Office Based		Recent medical cost	escalation		
<ul> <li>Netwo</li> </ul>	Out of Network Outpatient - Other Out of Network Outpatient - Office B	6	Safety risks			
<ul> <li>Pharm</li> </ul>	Emergency Benefits		Valid DEA or Contro	lled Substance Certificate o	r acceptable substitute	
<ul> <li>Proces</li> </ul>	ss fo Prescription Drugs					
<ul> <li>Provid</li> </ul>	ler Credentialing					Add Source here Add
Retros	spective Review		Source			
<ul> <li>Service</li> </ul>	e Limitations		Internal market and	competitive analysis		
		· 🗹	Medical expert revi	ews		
			Medicare physician	fee schedules		
		•	More than 50 perce interventions (as de	ent of outpatient episodes o fined by nationally accepte	f care for specific diseases ar d best practices) in a 12-mor	e not based on evidence-based hth sample of claims data.
			National accreditati	on standards		•
		8 Sa	ve - Do	ocument	Citat	ion
	For each I whether a <b>NQTL</b> Formu Geogr Netwo Netwo Pharm Provid Retros	For each NQTL, select applicable factor(s) and provide whether and how the NQTL is applied to a particular <b>Network Outpatient - Office Based -</b> <b>NQTL</b> Formulary Geograph Network Inpatient Geograph Network Outpatient - Other Medical N Network Outpatient - Other Out of Network Outpatient - Other Pharmacy Process fo Provider Credentialing Retrospective Review Service Limitations	For each NQTL, select applicable factor(s) and provide appropriate so whether and how the NQTL is applied to a particular benefit.	For each NQTL, select applicable factor(s) and provide appropriate sources and applicable whether and how the NQTL is applied to a particular benefit.	For each NQTL, select applicable factor(s) and provide appropriate sources and applicable quantitative or qualitative or whether and how the NQTL is applied to a particular benefit.	For each NQTL, select applicable factor(s) and provide appropriate sources and applicable quantitative or qualitative evidentiary standard(s) that r whether and how the NQTL is applied to a particular benefit. IN Network Outpatient - Office Based - NQTL Geograph In Network Outpatient - Office Based Medical N Network Outpatient - Other Medical N Network Outpatient - Other Medical N Network Outpatient - Office Based Pharmacy Process to Process to Process to Process to Process to Process to Provider Credentialing Medical expert reviews Medical expert reviews

- 1. Select the **Factors** section in the product line navigation bar.
- 2. Select the Sources & Evidentiary Standards tab.
- 3. Select the appropriate NQTL.
- 4. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 5. Select the appropriate benefit category tab.
- 6. Select the factor for which you want to provide source(s) and any evidentiary standard(s).
- 7. In the **Source** table, click the checkbox for each applicable source and/or evidentiary standard.
- 8. Click Save.

**Optional:** To apply the same source(s) and/or evidentiary standard(s) to all factors at once, click the **Apply to All Factors** check box after making the selections for at least one factor and click **Save**.



Plan Information N	OTLs Factors	Measures Comparative An:	lusis Findings & Conclusions	Standards
C Phan Hind Haddin Color Phan	grita Foctora	measures comparative site	iyas entrangela conclusions	and a second sec
1. Identify Fact	ors	2. Define Factors	3. Sources & Evidentiary Standar	ds
or each NQTL, select applicable factor(s) and provide a	ppropriate sources and	i applicable quantitative or quali	tative evidentiary standard(s) that ref	lect an adequate basis for determining
whether and how the NQTL is applied to a particular be	nefit.			
Lassification			Mental Hea	Ith/Substance Use Medical/Surgical
Network Outpatient - Office Based -			100-	
NQTL		all Frankson		
Formulary Design	Apply to a	au Factors		
Geographic Restrictions	Factor			
Medical Necessity Criteria	Recent m	nedical cost escalation		
Network Tier Design	Safety ris	sks		
Pharmacy – Medical Necessity	Valid DE	A or Controlled Substance Certi	icate or acceptable substitute	
Process for Assessment of New Technologies				
Provider Credentialing				Add Source here
Retrospective Review	Source			
Service Limitations	Internal	I market and competitive analysi		
	Medical	l expert reviews		
	Medicar	re physician fee schedules		
	More th	an 50 nercent of outnatient enis	orles of care for specific diseases are	not based on evidence-based
	interver	ntions (as defined by nationally a	ccepted best practices) in a 12-month	n sample of claims data.

# Uploading Documentation with Response

## To attach a document with source(s) and/or evidentiary standard(s):





- 1. Select the **Factors** section in the product line navigation bar.
- 2. Select the Sources & Evidentiary Standards tab.
- 3. Select the appropriate NQTL.
- 4. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 5. Select the appropriate benefit category tab.
- 6. Select the factor for which you want to attach a document.
- 7. Click the down arrow to the right of the **Save** button.
- 8. Click **Add Document**. A pop-up window for the Document Manager will open. Attach the appropriate document(s). For instructions, see <u>Document Manager</u>.

Attaching a document for an NQTL completes the source and/or evidentiary standard sub-section for the NQTL in all relevant classifications and benefit categories. A check mark will appear in each of the corresponding navigation labels for the NQTL, classification and benefit category.

## Measures

The **Measures** section is used to identify all operations measures for each NQTL identified in the **Identify NQTLs** sub-section. The **Identify NQTLs** sub-section *must* have the applicable NQTL, classification and benefit category selected as a prerequisite for filling out the **Measures** section.

Organizations may select from the default list provided in the **Measures** section or add custom measures. To add, delete, or edit a custom measure, see <u>Custom Items</u>.

An option is available to attach documentation instead of making selections manually in the interface. To use this option, see <u>Uploading Documentation with Response</u>.

## To identify measures:





- 1. Select the **Measures** section in the product line navigation bar.
- 2. Select the appropriate NQTL.
- 3. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 4. Select the appropriate benefit category tab.
- 5. Click the check box for each applicable operations measure.
- 6. Click Save.

Repeat the steps above for each NQTL, each respective benefit category and classification.

**Note:** Only the relevant classifications for the selected NQTL, based on responses saved in the **Identify NQTLs** sub-section, will display as clickable in the **Classification** dropdown.

Demo Commercial Product Line	
Plan Information NQTLs	Factors Measures Comparative Analysis Findings & Conclusions Standards
Chronication In Network Outpatient - Office Based -	Mental Health/Substance Use Medical/Surgical
NQTL In Network Inpatient	For each NQTL, identified of the Operations Measures the approximation conclude collecte and applying for the purposes of
Application Out of Network Inpatient	NOTE: Organization Classifications relevant for the selected
Concurrent In Network Outpatient - Other	NQTL are clickable.
In Network Outpatient - Office Based Fail-First Pr	Irrelevant classifications are grayed out.
Out of Network Outpatient - Other	Operations Measure
Emergency Benefits	
Network Tie Prescription Drugs	Inter-rater reliability surveys for medical/surgical, mental health and substance use disorder reviewers
Pharmacy –	Internal audit findings related to coverage determination consistency with the plan's medical necessity criteria
Prior Authorization	Length of time afforded for each review
Process for Assessment of New Technologies	<ul> <li>Member satisfaction/consumer survey results</li> </ul>
Retrospective Review	Number of days or visits authorized per review
	Percentage of providers in area enrolled in network
	Provider-to-enrollee ratios
	Requirements for the qualifications of provider staff involved in reviews
	Results of secret shopper surveys to determine that network providers are actually accepting new patients
	Save - Document Citation

**Note:** Only the relevant benefit categories for the selected NQTL and classification, based on responses saved in the **Identify NQTLs** sub-section, will display as clickable tabs.



Aassification ut of Network Outpatient - Other *  NGTL Concurrent Review Fail-First Protocols Medical Management Network Tier Design Pharmacy – Medical Necessity Prior Authorization Process for Assessment of New Technologies Retrospective Review Service Limitations	Mental Health/Substance Use Medical/Surgic	all of the Operations Measures the The tab is grayed ou not relevant f	NQTL, identify that the NOT Irganize	For each 1 ensuring NOTE: Or	rk Outpatient - Other +	assification ut of Network Outpatier NQTL Concurrent Review
NQTL Concurrent Review       For each NQTL, identify all of the Operations Measures the organization regularly collects and analyzes for ensuring that the NOT is to the total is grayed out as the benefit category is not relevant for the selected NQTL.         Note: Organizz       The tab is grayed out as the benefit category is not relevant for the selected NQTL.         Note: Organizz       Operations Measure         Pharmacy – Medical Naccessity       Addressing workforce shortage issues         Prior Authorization       Addressing workforce shortage issues         Process for Assessment of New Technologies       Assessments of provider directory accuracy         Assessments of whether network providers are actually submitting claims         Service Limitations       Availability of less intensive level of care when fail-first NQTL is imposed	ne organization regularly collects and analyzes for purposes of but as the benefit category is for the selected NQTL.	The tab is grayed ou not relevant f	NQTL, identify that the NOT organiza	For each ensuring NOTE: Or	review rotocols	NQTL Concurrent Review
Fail-First Protocols       NOTE: Organization       The tab is grayed out as the benefit category is not relevant for the selected NQTL.         Medical Management - Disease Management       Operations Measure       Inter relevant for the selected NQTL.         Pharmacy - Medical Necessity <ul> <li>Addressing workforce shortage issues</li> <li>Analysis of rates of utilization of out-of-network (OON) services</li> <li>Assessments of provider directory accuracy</li> <li>Assessments of whether network providers are actually submitting claims</li> <li>Availability of tess intensive level of care when fail-first NQTL is imposed</li> </ul>	out as the benefit category is for the selected NQTL.	he tab is grayed ou not relevant f	)rganiza	NOTE: Or	rotocols	
Medical Management - Disease Management       not relevant for the selected NQIL.         Network Tier Design       Operations Measure         Pharmacy - Medical Necessity <ul> <li>Addressing workforce shortage issues</li> <li>Addressing workforce shortage issues</li> <li>Analysis of rates of utilization of out-of-network (OON) services</li> <li>Assessments of provider directory accuracy</li> <li>Assessments of whether network providers are actually submitting claims</li> <li>Availability of less intensive level of care when fail-first NQTL is imposed</li> </ul>	for the selected NQIL.	not relevant f			Diana Managara	Fail-First Protocols
Network Tier Design     Operations Measure       Pharmacy – Medical Necessity     Addressing workforce shortage issues       Prior Authorization     Addressing workforce shortage issues       Process for Assessment of New Technologies     Analysis of rates of utilization of out-of-network (OON) services       Retrospective Review     Assessments of whether network providers are actually submitting claims       Service Limitations     Availability of less intensive level of care when fail-first NQTL is imposed		e			anagement - Disease Management	Medical Management -
Pharmacy – Medical Necessity     Addressing workforce shortage issues       Prior Authorization     Addressing workforce shortage issues       Process for Assessment of New Technologies     Anatysis of rates of utilization of out-of-network (OON) services       Retrospective Review     Assessments of whether network providers are actually submitting claims       Service Limitations     Availability of less intensive level of care when fail-first NQTL is imposed			rations Measure	Opera	ier Design	Network Tier Design
Prior Authorization     Analysis of rates of utilization of out-of-network (OON) services       Process for Assessment of New Technologies     Assessments of provider directory accuracy       Retrospective Review     Assessments of whether network providers are actually submitting claims       Service Limitations     Availability of less intensive level of care when fail-first NQTL is imposed		rce shortage issues	ressing workford	Addr	- Medical Necessity	Pharmacy – Medical Ne
Process for Assessment of New Technologies       Assessments of provider directory accuracy         Retrospective Review       Assessments of whether network providers are actually submitting claims         Service Limitations       Availability of less intensive level of care when fail-first NQTL is imposed	N) services	utilization of out-of-network (OON)	lysis of rates of u	- Analy	prization	Prior Authorization
Retrospective Review       Assessments of whether network providers are actually submitting claims         Service Limitations       Availability of less intensive level of care when fail-first NQTL is imposed		vider directory accuracy	essments of prov	Asse	Assessment of New Technologies	Process for Assessment
Service Limitations Availability of less intensive level of care when fail-first NQTL is imposed	ally submitting claims	ether network providers are actually	essments of whe	Asse	ive Review	Retrospective Review
The second	rst NQTL is imposed	ntensive level of care when fail-first	lability of less ir	Avail:	nitations	Service Limitations
Average appointment wait times		ent wait times	rage appointmer	Avera	*	
<ul> <li>Average denial rates for medical necessity for mental health and substance use disorder benefits, and medical/surgical benefits.</li> </ul>	health and substance use disorder benefits, and	es for medical necessity for mental h nefits.	rage denial rates ical/surgical ben	Avera medie		
Average length of stay authorized per episode of care	2	stay authorized per episode of care	rage length of st	Avera		

# **Completion Check Marks**

When at least one operations measure selection has been saved for an NQTL within a benefit category, a check mark will display in the corresponding category tab.

emo Commercial Product Line	
Plan Information NQTLs	Factors Measures Comparative Analysis Findings & Conclusions Standards
lassification Jut of Network Inpatient •	Mental Health/Substance Us Medical/Surgica
NQTL	For each NQTL, identify all of the Operations Measures the organization regularly collects and any les for the purposes of
Application of Medical Necessity Criteria	ensuring that the NQTL is applied in a NOTE: Organizations may utilize the a The check mark displays upon saving
Concurrent Review	at least one operations measure
Fail-First Protocols	Add Operation Measure her
Medical Management - Disease Management	Operations Measure
Network Tier Design	Assessments of whether network providers are actually submitting claims
Process for Assessment of New Technologies	Availability of less intensive level of care when fail-first NQTL is imposed
Retrospective Review	Average appointment wait times
Service Limitations	<ul> <li>Average denial rates for medical necessity for mental health and substance use disorder benefits, and medical/surgical benefits.</li> </ul>
Operations	Average length of stay authorized per episode of care
measure selection	Comparison of disparity between in-network and out-of-network services for MH/SUD benefits vs. the disparity for M/S benefits
	Comparison of reimbursement rates for in-network and out-of-network services
	Complaint tracking (enrollees and providers)
	Save   Document  Citation



When the operations measure selection has been completed for all relevant benefit categories within a classification, a check mark will display next to the corresponding classification in the **Classification** dropdown.

Plan Information NQTLs Fetors Measures Comparative Analysis Findings & Conclusions Standards   Check mark displays after completing all categories suthin the classification   NQTL Centry of Network Inpatient Centry of Network Inpatient   Oncurrent Concurrent Centry of Network Inpatient Centry of Network Inpatient   Fail-First P In Network Outpatient - Other   Out of Network Revi	Demo Commerc	<u>cial Product Line</u>				Completed	
Check mark displays after   Cut of Network Inpatient     Nort   Concorrent   Concorrent <		Plan Information NQTLs	Factors Measures	Comparative Analysis	Findings & Conclusions	Standards	
NUT Precision of the construction   Percent of Network Instance Precision of Network Outpatient - Other Out of Network Review Service Limitations Out of Network Review Service Limitations Outpatient ates for medical necessity for mental health and substance use disorder benefits, and medical/surgical benefits. Outpatient fits: Outpatient of the substance use disorder benefits, and medical/surgical benefits. Outpatient of substance use disorder benefits, and medical/surgical benefits. Outpatient of substance use disorder benefits, and medical/surgical benefits. Outpatient of substance use disorder benefits.	Classification Out of Network	check mark disp completing all c	olays after ategories		Mental Health	/Substance Us 🗹 Medical/Surgica 🌱	
Formulary I   In Network Outpatient - Office Based   Out of Network Outpatient - Office Based   Network Tie   Prescription Drugs   Process for Assessment of New Technologies   Retrospective Review   Service Limitations	NQTL Concurrent Fail-First Pr	Out of Network Inpatient	ensuring that the NQTL is NOTE: Organizations may	of the Operations Meas applied in compliance w utilize the default list or	ures the organization regularly ith MHPAEA. add their own measures.	collects and analyzes for the purposes of	
Medical Mai Out of Network Outpatient - Office Based   Network Tri   Pragency Benefits   Pharmacy   Prescription Drugs   Addressing workforce shortage issues   Analysis of rates of utilization of out-of-network (OON) services   Analysis of rates of utilization of out-of-network (OON) services   Assessments of provider directory accuracy   Assessments of provider directory accuracy   Availability of less intensive level of care when fail-first NQTL is imposed   Average appointment wait times   Average denial rates for medical necessity for mental health and substance use disorder benefits, and medical/surgical benefits.   Average length of stay authorized per episode of care	Formulary [	In Network Outpatient - Office Based				Add Operation Measure her Add	
Network Tia   Emergency Benefits   Pharmacy   Process for Assessment of New Technologies   Retrospective Review   Service Limitations	Medical Ma	Out of Network Outpatient - Office Based	Operations Measure			<b>A</b>	
Pharmacy Prescription Drugs   Process for Assessment of New Technologies   Retrospective Review   Service Limitations	Network Tie	Emergency Benefits	Addressing workforce	shortage issues			
Process for Assessment of New Technologies <ul> <li>Assessments of provider directory accuracy</li> <li>Assessments of whether network providers are actually submitting claims</li> <li>Availability of less intensive level of care when fail-first NQTL is imposed</li> <li>Avarage appointment wait times</li> <li>Avarage denial rates for medical necessity for mental health and substance use disorder benefits, and medical/surgical benefits.</li> <li>Avarage length of stay authorized per episode of care</li> </ul>	Pharmacy –	Prescription Drugs	Analysis of rates of uti	ization of out-of-netwo	rk (OON) services		
Retrospective Review <ul> <li>Assessments of whether network providers are actually submitting claims</li> <li>Availability of less intensive level of care when fail-first NQTL is imposed</li> <li>Avarage appointment wait times</li> <li>Avarage denial rates for medical necessity for mental health and substance use disorder benefits, and medical/surgical benefits.</li> <li>Avarage length of stay authorized per episode of care</li> </ul> Save         Document         Citation	Process for A	Assessment of New Technologies	Assessments of provid	er directory accuracy			
Service Limitations Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care when fail-first NQTL is imposed Availability of less intensive level of care benefits. Availability of less intensive level of care Availability of less intensity of less intensity of less intensi	Retrospectiv	e Review	Assessments of wheth	er network providers ar	e actually submitting claims		
<ul> <li>Average appointment wait times</li> <li>Average denial rates for medical necessity for mental health and substance use disorder benefits, and medical/surgical benefits.</li> <li>Average length of stay authorized per episode of care</li> </ul>	Service Limit	ations	Availability of less interest	nsive level of care wher	fail-first NQTL is imposed		
Average denial rates for medical necessity for mental health and substance use disorder benefits, and medical/surgical benefits. Average length of stay authorized per episode of care  Save  Document Citation			<ul> <li>Average appointment</li> </ul>	wait times			
Average length of stay authorized per episode of care  Save Document Citation			Average denial rates for medical necessity for mental health and substance use disorder benefits, and medical/surgical benefits.				
Save Document Citation			Average length of stay	authorized per episode	of care		
			Save 🔹	Document	c	Citation	

When the operations measure selection has been completed for all relevant benefit categories <u>and</u> classifications, a check mark will display next to the corresponding NQTL name on the left.



Plan Information NOTLs	Factors Measures Comparative Analysis Findings & Conclusions Standards	
eification etwork Outpatient - Office Based -	Mental Health/Substance Us	Medical/Surgica
NQTL In Network Inpatient	For each NOTL identify all of the Operations Measures the organization regularly collects and analyzer	s for the purposes
Application V Out of Network Inpatient	Relevant applied in compliance with MHPAEA.	
Concurree In Network Outpatient - Other	lassifications	
Fail-First	completed Add Operation	Measure her
Out of Network Outpatient - Other		
Out of Network Outpatient - Office Based	Operations Measure	
Medical N Emergency Benefits	Addressing workforce shortage issues	
Network Prescription Drugs	Analysis of rates of utilization of out-of-network (OON) services	
Pharmacy – Medical Necessity	Assessments of provider directory accuracy	
Process for Assessment of New Technologies	Assessments of whether network providers are actually submitting claims	
Retrospective Review	<ul> <li>Availability of less intensive level of care when fail-first NQTL is imposed</li> </ul>	
	Average appointment wait times	
Check mark displays after completing all benefit	Average denial rates for medical necessity for mental health and substance use disorder benefits, a medical/surgical benefits.	and
egories and classifications	Average length of stay authorized per episode of care	

# Uploading Documentation with Response

# To attach a document with operations measures:

				<u> </u>	•		
	Plan Information	NQTLs	Facto	rs Measures	Comparative Analysis	Findings & Conclusions	Standards
Classification Out of Network Out	patient - Office Based 🕶					4 Mental	Health/Substance Use Medical/Surgi
NQTL		•	For e	ach NQTL, identify	all of the Operations Meas	ures the organization regularly	collects and analyzes for the purposes o
Formulary Design			ensu NOT	ring that the NQTL F: Organizations m	is applied in compliance w	ith MHPAEA.	
Geographic Restric	tions		1401	L. Organizations in	ay utilize the default list of	add their own measures.	
Medical Necessity	Criteria						Add Operation Measure her
Network Tier Desi	gn			Operations Measur	e		
Pharmacy – Medica	al Necessity			Addressing workfo	rce shortage issues		
Process for Assess	sment of New Technologies			Analysis of rates of	utilization of out-of-netwo	k (OON) services	
Provider Credentia	ling			Assessments of pro	wider directory accuracy		
Retrospective Revi	iew			Assessments of wh	ether network providers an	e actually submitting claims	
Service Limitations	5			Availability of less i	ntensive level of care when	fail-first NQTL is imposed	
				Average appointme	nt wait times		
				Average denial rate nedical/surgical be	s for medical necessity for nefits.	mental health and substance u	se disorder benefits, and
				Average length of s	tay authorized per episode	of care	
			5	•	Document	c	Citation



- 1. Select the **Measures** section in the product line navigation bar.
- 2. Select the NQTL for which you want to attach a document.
- 3. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 4. Select the appropriate benefit category tab.
- 5. Click the down arrow to the right of the **Save** button.
- 6. Click **Add Document**. A pop-up window for the Document Manager will open. Attach the appropriate document(s). For instructions, see <u>Document Manager</u>.

#### **Completion Check Marks**

Attaching a document automatically completes the NQTL in all relevant classifications and benefit categories. A check mark will display in each of the corresponding navigation labels for the NQTL, classification and benefit category.

Demo Commercial Product Line		
Plan Information NQTLs	Factors Measures Comparative Analysis Findings & Conclusions Standards	
Constitution In Network Outpatient - Office Based -	Mental Health/Substance Use Medical/Surgica	~
NQTL In Network Inpatient	For each NQTL, identify all of the Operations Measures the organization regularly collects and analyzes for the purposes	of
Applicatic 🔽 Out of Network Inpatient	ensuring that the NQTL is applied in compliance with MHPAEA. NOTE: Organizations may utilize the default list or add their own measures.	
Concurre In Network Outpatient - Other		
Fail-First	Add Operation Measure her	Add
Formular Out of Network Outpatient - Office Based	Operations Measure	
Medical N Emergency Benefits	Addressing workforce shortage issues	
Prescription Drugs	Analysis of rates of utilization of out-of-network (OON) services	
Pharmacy – Medical Necessity	Assessments of provider directory accuracy	
Process for Assessment of New Technologies	Assessments of whether network providers are actually submitting claims	
Retrospective Review	Availability of less intensive level of care when fail-first NQTL is imposed	
	Average appointment wait times	
	Average denial rates for medical necessity for mental her medical/surgical benefits. Attaching a document automatically completes	
	Average length of stay authorized per episode of care the NQTL	-
	Save   Document  Citation	
	Demo File.docx Page 5	

## **Comparative Analysis**

The **Comparative Analysis** section is used to provide a comparative analysis for each NQTL identified in the **Identify NQTLs** sub-section. The **Identify NQTLs** sub-section *must* have the applicable NQTL and classification selected as a prerequisite for completing the **Comparative Analysis** section.

An option is available to attach documentation for an NQTL instead of entering the comparative analysis manually in the interface. To use this option, see <u>Uploading Documentation with Response</u>.


### To provide a comparative analysis:

	Plan Information NQTLs	Factors	Measures C	omparative Analysis Find	ings & Conclusions	Standards	
Apply to all C	lassifications	For oach	NOTL provide ap a	polycic that domonstrator that	t processos, stratagios	and ovidentiary standards used in applyi	ing
Classification In Network Out	tpatient - Other <del>-</del>	the NQTI	are comparable ar	nd no more stringently applied	as written and in ope	ration.	ng
NQTL	In Network Inpatient	D T		<u>م</u>			
experimenta	Out of Network Inpatient	в 1		10			
Fail-first Pro	In Network Outpatient - Other	Insert con	tent here				1
Formulary D	In Network Outpatient - Office Based	4					
Geographic	Out of Network Outpatient - Other						
Medical Nec	Out of Network Outpatient - Office Based						
medicarrice	Emergency Benefits						
Network Tie	Prescription Drugs						
Pharmacy – N	Aedical Necessity						
Process for A	ssessment of New Technologies			<b>D</b>		Other	

- 1. Select the **Comparative Analysis** section in the product line navigation bar.
- 2. Select the appropriate NQTL.
- 3. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 4. Enter text into the box.
- 5. Click Save.

Repeat the above steps for each NQTL and each respective classification.

**Optional:** To apply the same comparative analysis text for an NQTL to all relevant classifications at once, click the **Apply to All Classifications** check box after entering the text for the selected NQTL and click **Save**.

Disp Information NO		
Plan mornauon ing	TLs Factors Measures Comparative Analysis Findings & Conclusion	is Standards
Apply to all Classifications		
lassification	For each NQTL, provide an analysis that demonstrates that processes, strate the NOTL are comparable and no more stringently applied as written and in	egies and evidentiary standards used in applyi operation
Network Inpatient *	and the the comparable and no more sumgering appace as million and m	<u>operation</u> .
NQTL		
Application of Medical Necessity Criteria	BIU⇔⊯≣⊛	
Concurrent Review	Organization conducts analysis to determine if the strategy, process, standards, and of New Technology are comparable and not more stringently applied to MH/SUD tech	source information used to conduct Assessments mology than to M/S technology. The same TAC
Fail-First Protocols	committee, using the same process, relevant clinical expertise, factors, evidentiary st evidence) are used for New Technology assessments of M/S and MH/SUD. Organiza	andards, and clinical sources (hierarchy of tion concludes that New Technology assessments
	are comparable to and not more stringent for MH/SUD than M/S, in writing.	
Medical Management - Disease Management	Organization performed an analysis of New Technology Assessments in operation	n. The volume of all assessments, as well as the
Medical Management - Disease Management Network Tier Design	Organization performed an analysis of New Technology Assessments in operation outcome of all assessments does not represent sample sizes sufficient for robust an make evident that M/S and MH/SUD technology assessments are readily available make evident that M/S and MH/SUD technology assessments are readily available.	n. The volume of all assessments, as well as the nalysis. Despite this, the available information does ble using the same process, factors, evidentiary
Medical Management - Disease Management Network Tier Design Pharmacy – Medical Necessity	Organization performed an analysis of New Technology Assessments in operation outcome of all assessments does not represent sample sizes sufficient for robust an make evident that M-S and MH/SUD technology assessments are readily availa standards, and sources. No disparity exists in Organization's Assessment of New Te of M/S and MH/SUD New Technology, which becomes available to review. Accord	n. The volume of all assessments, as well as the talysis. Despite this, the available information does bile using the same process, factors, evidentiary chnology; rather the disparity is inherent in the ratio ingly. Organization finds that Assessment of New
Medical Management - Disease Management Network Tier Design Pharmacy – Medical Necessity Prior Authorization	Organization performed an analysis of New Technology Assessments in operation outcome of all assessments does not represent sample sizes sufficient for robust an make evident that M/S and MH/SUD technology assessments are readily availa standards, and sources. No disparity exists in Organization's Assessment of New Te of M/S and MH/SUD New Technology, which becomes available to review. Accorr Technology is comparable and no more stringent for M/S than MH/SUD, in operation	n. The volume of all assessments, as well as the halysis. Despite this, the available information does bile using the same process, factors, evidentian chonoloy; rather the disparity is inherent in the faith dingly. Organization finds that Assessment of New



**Note:** Only the classifications relevant to the selected NQTL, based on responses saved in the **Identify NQTLs** sub-section, will display as clickable in the **Classification** dropdown.

Demo Commercial Product Line	
Plan Information NQTLs	Factors Measures Comparative Analysis Findings & Conclusions Standards
Apply to all Classifications Classification In Network Outpatient - Other -	For each NQTL, provide an analysis that demonstrates that processes, strategies and evidentiary standards used in applying the NQTL are comparable and no more stringently applied <u>as written</u> and <u>in operation</u> .
NQTL Experimente Out of Network Inpatient	
Fail-III'st PTC In Network Outpatient - Other Formulary D In Network Outpatient - Office Based Geographic Out of Network Outpatient - Other	Classifications relevant for the
Out of Network Outpatient - Office Based Medical Nec Emergency Benefits Network Tie Prescription Drugs	Irrelevant classifications are grayed out.
Pharmacy – Medical Necessity Process for Assessment of New Technologies	
Provider Credentialing	Save - Document Citation

### Uploading Documentation with Response

To attach a document with the comparative analysis for an NQTL:

Pl	an Information NQTLs	Factors	Measures	Comparative Analysis	Findings & Conclusions	Standards	
Apply to all Classifications Classification In Network Outpatient - Office Bas	ed 🕶	For each the NQT	NQTL, provide L are comparab	an analysis that demonstra le and no more stringently	ates that processes, strategies applied <u>as written</u> and <u>in ope</u>	s and evidentiary standards used in <u>ration</u> .	applying
NQTL	<b>^</b>	вī	Us ≟=	:= &			
Exclusions for Court-Ordered 1	reatment	Insert con	tent here				
Exclusions for Failure to Comp Treatment	ete a Course of						
Experimental or investigationa	Services						
Fail-first Protocols							
Formulary Design							
Geographic Restrictions							-
Medical Necessity Criteria				Document		Citation	

- 1. Select the **Comparative Analysis** section in the product line navigation bar.
- 2. Select the NQTL for which you want to attach a document.
- 3. Click the **Classification** dropdown and select the appropriate classification from the menu.
- 4. Click the down arrow to the right of the **Save** button.



5. Click **Add Document**. A pop-up window for the Document Manager will open. Attach the appropriate document(s). For instructions, see <u>Document Manager</u>.

Attaching a document completes the NQTL in all applicable classifications. A check mark will display next to the corresponding NQTL and each applicable classification.

### **Findings and Conclusions**

The **Findings and Conclusions** section is used for inferences regarding compliance to MHPAEA for each NQTL identified in the **Identify NQTLs** sub-section. The **Identify NQTLs** sub-section *must* have the applicable NQTL selected as a prerequisite for completing the **Findings and Conclusions** section.

An option is available to attach documentation for an NQTL instead of entering the findings and conclusions information manually in the interface. To use this option, see <u>Uploading Documentation with Response</u>.

#### To provide findings and conclusions:

ion that indicate compliance

- 1. Select the Findings & Conclusions section in the product line navigation bar.
- 2. Select the appropriate NQTL.
- 3. Enter text into the box.
- 4. Click Save.

Repeat the above steps for each identified NQTL.



### Uploading Documentation with Response

### To attach a document with findings and conclusions for an NQTL:

	Plan Information	NQTLs	Factors	М	easure	es	Com	arative Analysis Findings & Conclusions Stan	dards
<b>NQTL</b> Fail-first Protocols		•	For with	each Ní Menta	QTL, d l Heal	lisclos lth Pa	se the rity an	ecific findings and conclusions reached by the organiz Addiction Equity Act.	ation that indicate compliance
Formulary Design			в	τU	S	1=	:=	\$	
Geographic Restrictions			-		there	-		·	
Medical Necessity Crite	ia		moer	conten	( liele				
Network Tier Design									
Pharmacy – Medical Ne	cessity								
Process for Assessment	of New Technologies								
Provider Credentialing									
Retrospective Review									-

- 1. Select the Findings and Conclusions section in the product line navigation bar.
- 2. Select the NQTL for which you want to attach a document.
- 3. Click the down arrow to the right of the **Save** button.
- 4. Click **Add Document**. A pop-up window for the Document Manager will open. Attach the appropriate document(s). For instructions, see <u>Document Manager</u>.

Attaching a document completes the NQTL. A check mark will display next to the corresponding NQTL.

#### **Standards**

The **Standards** section is used for evidence of compliance to Mental Health/Substance Use Disorder Parity Program Accreditation Standards and MHPAEA.

There are 13 Standards for response. Organizations seeking accreditation are required to complete the **Standards** section in its entirety for each product line associated with the accreditation application.

Organizations which are licensing the ParityManager<sup>™</sup> software only and are not pursuing accreditation still have full access to view and complete the **Standards** section.



### To complete a Standard (accreditation applicants only):

Demo Commercial Product L	ine 🔻 - Standard 6: Financ	al Requirement	s				1
	Plan Information	NQTLs Fa	ctors	Measures	Comparative Analysis	Findings & Conclusions	Standards
	Standard				Questionnaire		Standard 1: Business Management
	6.0 Financial Requirements						
The organization ensures all benefits are not more restrict	he organization ensures all imposed financial requirements (such as co-pays and deductibles) for the mental health or substance use disorder venefits are not more restrictive than the predominant financial requirements applied to the medical/surgical benefits within the same						
classification. [M] For mental health or substan	ce use disorder benefits in	each classificat	ion, the	organization io	lentifies:		Standard 5: Benefit Identification and Classification
a. Financial requirements b. Applicable predominant le	evels that apply						Standard 6: Financial Requirements Standard 7: Quantitative Treatment
Supporting Documentation	Supporting Documentation						
Document	Document Citation 5 To complete this standard, you MUST check the following box:						Quantitative Treatment Limitations (NQTLs)
Demo File.docx	Demo File.docx Page 5					Standard 9: Comparative Analysis "As Written"	
							Standard 10: Comparative Analysis "In Operation"
							Standard 11: Disclosure of Medical Necessity Criteria
							Standard 12: Disclosure of Denial Reasons
							Standard 13: Disclosure of Parity Compliance Analysis

- 1. Select the **Standards** section in the product line navigation bar.
- 2. Select the appropriate Standard in the sidebar navigation pane.
- 3. Click the **Supporting Documentation** button. A pop-up window for the Document Manager will display.
- 4. Attach the appropriate document(s). See <u>Document Manager</u> for instructions.
- 5. Click the **I certify this standard is complete** check box.
  - Clicking the **I certify this standard is complete** check box locks your ability to make further edits to your responses.
  - To make further edits to your responses, uncheck the **I certify this standard is complete** check box. You can continue to make further edits until you have submitted your accreditation application to URAC for review.



### To complete a Standard (ParityManager<sup>™</sup> software licensees only):

	Demo Commercial Product Line - Standard 1: Business Managem	ient	1
	Plan Information NQTLs	Factors Measures Comparative Analysis Finding	gs & Conclusions Standards
	1.1 Regulatory Compliance and Internal Controls 1.2 Maintaining C 1.5 Det	Compliance 1.3 Policy and Process Maintenance 1.4 Writt egation Management	en Agreements Standard 1: Business Management Standard 2: Personnel
	1.1 Regulatory Com	oliance and Internal Controls	Standard 3: Parity Compliance Standard 4: Annual/Lifetime Dollar
	The organization promotes compliance with applicable jurisdictiona	I laws and regulations. [M]	Limits
	The organization:		Standard 5: Benefit Identification and Classification
	<ul> <li>a. Hacks applicable jurisdictorial taws and registrations.</li> <li>b. Audits compliance with applicable jurisdictional laws and regulatorial compliance and incidents related to recompliance and incidents related to recompliance and incidents.</li> </ul>	tions.	Standard 6: Financial Requirements
	occurrences. d. Identifies a Compliance Officer responsible for overseeing the Co	mpliance Program.	Standard 7: Quantitative Treatment Limitations (QTLs) Requirements
3	Supporting Documentation		Standard 8: Identification of Non- Quantitative Treatment Limitations (NQTLs)
4	Document Citation		Standard 9: Comparative Analysis "As Written"
			Standard 10: Comparative Analysis "In Operation"
			Standard 11: Disclosure of Medical Necessity Criteria
			Standard 12: Disclosure of Denial Reasons
			Standard 13: Disclosure of Parity Compliance Analysis

- 1. Select the **Standards** section in the product line navigation bar.
- 2. Select the appropriate Standard in the sidebar navigation pane.
- 3. Click the **Supporting Documentation** button. A pop-up window for the Document Manager will display.
- 4. Attach the appropriate document(s). See <u>Document Manager</u> for instructions.

### Standards with Sub-sections

Standards 1, 2 and 3 contain sub-sections that each require a response. The sub-sections will be displayed as separate tabs, as depicted in the example screenshot below.



Demo Commercial Product Line - Standard 3: Parity Compliance	
Plan Information NQTLs Factors Measures Comparative Analysis Findings & Conclusions	Standards
3.1 Parity Compliance Program 3.2 Parity Compliance Activities 3.3 Addressing Parity Violations 3.4 Parity Compliance Program Evaluation	Standard 1: Business Management
3.1 Parity Compliance Program	Standard 2: Personnel <
The organization develops, maintains, and oversees its Parity Compliance Program, which includes tracking parity violations. [M]	Standard 4: Annual/Lifetime Dollar Limits
The organization has a written description for its Parity Compliance Program that: a. Describes: i. Goals and objectives.	Standard 5: Benefit Identification and Classification
ii. Program structure, to include scope of services and activities. iii. Tracking of parity violations.	Standard 6: Financial Requirements
b. Defines: i. Roles and responsibilities of committee(s). ii. Annual review cycle, with updates as needed.	Standard 7: Quantitative Treatment Limitations (QTLs) Requirements
<ul><li>iii. Performance evaluation pursuant to goals and objectives.</li><li>c. Oversees and tracks activities that impact mental health and substance use disorder coverage determinations insofar as they may affect parity compliance.</li></ul>	Standard 8: Identification of Non- Quantitative Treatment Limitations (NQTLs) ✓
d. Describes relevant methodologies related to parity compliance.	Standard 9: Comparative Analysis "As Written" ✓
Supporting Documentation	Standard 10: Comparative Analysis "In Operation"
Document Citation	Standard 11: Disclosure of Medical Necessity Criteria

# **Completion Check Marks**

When at least one file has been attached as supporting documentation on a Standard response page, a check mark will display next to the corresponding Standard in the sidebar navigation.



Demo Commercial Product Line - Standard 8: Identification of Non-Quantitative Treatment Limitations (NQTLs)	
Plan Information NQTLs Factors Measures Comparative Analysis Findings & Conclusions	Standards
<ul> <li>B.O. Identification of Non-Quantitative Treatment Limitations (NQTLs)</li> <li>The organization ensures that operations, processes, strategies, evidentiary standards and other techniques used to determine benefits and coverage is not imposed or applied more stringently to mental health and substance use disorders than it applies to medical/surgical benefits and coverage. [M]</li> <li>P. Completes Section II (NQTLs), Section V (Comparative Analysis), and Section VI (Findings and Conclusions).</li> <li>B. Mintains a process to</li> <li>B. Asociate each NQTL with benefits within classifications.</li> <li>B. Surses that the ratio of application of the NQTL to benefits within each classification is equitable and not applied more stringently to mental health and substance use disorder use disorder benefits compared to medical/surgical.</li> <li>B. Secribes steps taken to address any disparity between the application of NQTL to benefits within each classification is equitable for mental health or substance use disorder in comparison to medical/surgical.</li> <li>D. Berribes steps taken to address any disparity between the application of NQTL to benefits within each classification is equitable for mental health or substance use disorder in comparison to medical/surgical.</li> <li>D. Berribes taken to address any disparity between the application of NQTL to benefits within each classification is equitable for mental health or substance use disorder in comparison to medical/surgical.</li> </ul>	Standard 1: Business Management Standard 2: Personnel · · Standard 3: Parity Compliance · Standard 4: Annual/Lifetime Dollar Limits Standard 5: Benefit Identification and Classification · · Standard 6: Financial Requirements Standard 7: Quantitative Treatment Limitations (QTLs) Requirements Standard 8: Identification of Non- Quantitative Treatment Limitations (NQTLs) · · · · · · · · · · · · · · · · · · ·
Document     Citation       Demo File.docx     Page 15	Standard 10: Comparative Analysis "In Operation" ✓ Standard 11: Disclosure of Medical Necessity Criteria ✓ Standard 12: Disclosure of Denial
	Reasons Standard 13: Disclosure of Parity Compliance Analysis

Accreditation Applicants Only

When the **I certify the Standard is complete** check box is clicked on a Standard response page, a check mark will display next to the corresponding Standard in the sidebar navigation.





### Standards with Questionnaires

When the Standard and the Questionnaire components have both been completed on Standards 4, 6 and 7, a check mark will display next to the corresponding Standard in the sidebar navigation.





Standards with Sub-sections

When all sub-sections on Standards 1, 2 and 3 have been completed, a check mark will display next to the corresponding Standard in the sidebar navigation.





#### Questionnaires

Standards 4, 6 and 7 each contain a Questionnaire component. Each Questionnaire is series of questions that require a Yes or No response. Depending on the Yes or No responses, some questions require supporting documentation. Organizations seeking accreditation must complete the Questionnaire on Standards 4, 6 and 7.

#### To complete a questionnaire:

#### Standard 4

- 1. Select the **Standards** section in the product line navigation bar.
- 2. Select Standard 4: Annual/Lifetime Dollar Limits in the sidebar navigation.
- 3. Click the **Questionnaire** tab.



Plan Information NQTLs Factors Measures Comparative Analys	is Finding	s & Conclusions	Standards		
Standard Questionnaire			Standard 1: Business Management		
×- ✓ - Minimum do	Document req cument require	uirement below ement complete	Standard 2: Personnel Standard 3: Parity Compliance		
QUESTION	Т	<sup>(PE</sup> 2	Standard 4: Annual/Lifetime Dollar Limits		
	Annual	Lifetime	Standard 5: Benefit Identification and		
oes the Organization apply an aggregate [TYPE] dollar limits to either mental health or substance use disorder enefits?	<ul><li>Yes</li><li>No</li></ul>	O Yes	Classification Standard 6: Financial Requirements		
loes the Organization apply an aggregate [TYPE] dollar limit to at least two thirds of the projected expenditures n medical/surgical benefits?			Standard 7: Quantitative Treatment Limitations (QTLs) Requirements		
loes the Organization apply the same aggregate [TYPE] dollar limit to mental health/substance use disorder enefits and medical/surgical benefits?			Standard 8: Identification of Non- Quantitative Treatment Limitations		
Does the Organization apply an aggregate [TYPE] dollar limit to mental health/substance use disorder benefits hat is not lower than the aggregate [TYPE] dollar limit applied to medical/surgical benefits?			(NQTLs) Standard 9: Comparative Analysis "As		
Ooes the Organization apply an aggregate [TYPE] dollar limit to more than one-third but less than two-thirds of nedical/surgical benefits and apply an aggregate lifetime dollar limit to mental health or Substance Use benefits hat is not lower than the average limit applied to medical/surgical benefits?			Written" Standard 10: Comparative Analysis "Ir Operation"		
			Standard 11: Disclosure of Medical Necessity Criteria		
			Standard 12: Disclosure of Denial Reasons		
			Standard 13: Disclosure of Parity		

4. In the **Question** table, respond to the question in the first row by selecting the Yes or No radio button in the **Type** column.

Demo Commercial Product Line - Standard 4: Annual/Lifetime Dollar Limits				
Plan Information NQTLs Factors Measures Compa	ative Analysis	Findings	& Conclusions	Standards
Standard Q	uestionnaire * - Do Minimum docu	ocument requ	irement below ment complete	Standard 1: Business Management Standard 2: Personnel Standard 3: Parity Compliance
QUESTION		TY	PE	Standard 4: Annual/Lifetime Dollar
Does the Organization apply an aggregate [TYPE] dollar limits to either mental health or substance us enefits?	e disorder	Annual Yes No	Lifetime O Yes O No	Standard 5: Benefit Identification and Classification Standard 6: Financial Requirements
loes the Organization apply an aggregate [TYPE] dollar limit to at least two thirds of the projected ex n medical/surgical benefits?	penditures			Standard 7: Quantitative Treatment Limitations (QTLs) Requirements
oes the Organization apply the same aggregate [TYPE] dollar limit to mental health/substance use d enefits and medical/surgical benefits?	isorder			Standard 8: Identification of Nonquantitative Treatment Limitations
loes the Organization apply an aggregate [TYPE] dollar limit to mental health/substance use disorder hat is not lower than the aggregate [TYPE] dollar limit applied to medical/surgical benefits?	benefits			(NQTLs) Standard 9: Comparative Analysis "As
Does the Organization apply an aggregate [TYPE] dollar limit to more than one-third but less than two nedical/surgical benefits and apply an aggregate lifetime dollar limit to mental health or Substance U hat is not lower than the average limit applied to medical/surgical benefits?	o-thirds of se benefits			Written" Standard 10: Comparative Analysis "In Operation"



Based on the user's response, the Yes and No radio buttons will become enabled for the relevant next question, as depicted in the example screenshot below.

Demo Commercial Product Line - Standard 4: Annual/Lifetin	e Dollar Limits					
Plan Information NQTL	s Factors	Measures	Comparative Analys	is Finding	s & Conclusions	Standards
Standard			Questionnaire			Standard 1: Business Management
			+ - ✓ - Minimum do	Document req	uirement below ement complete	Standard 2: Personnel Standard 3: Parity Compliance
QUESTION				TYPE		Standard 4: Annual/Lifetime Dollar
				Annual	Lifetime	Standard 5: Benefit Identification and
Does the Organization apply an aggregate [TYPE] dollar limi benefits?	• Yes • No	O Yes O No	Classification Standard 6: Financial Requirements			
Does the Organization apply an aggregate [TYPE] dollar limi on medical/surgical benefits?	<ul><li>Yes</li><li>No</li></ul>		Standard 7: Quantitative Treatment Limitations (QTLs) Requirements			
Does the Organization apply the same aggregate [TYPE] dollar limit to mental health/substance use disorder benefits and medical/surgical benefits?						Standard 8: Identification of Nonquantitative Treatment Limitation
Does the Organization apply an aggregate [TYPE] dollar limit to mental health/substance use disorder benefits that is not lower than the aggregate [TYPE] dollar limit applied to medical/surgical benefits?						(NQTLs) Standard 9: Comparative Analysis "A
Does the Organization apply an aggregate [TYPE] dollar limit to more than one-third but less than two-thirds of medical/surgical benefits and apply an aggregate lifetime dollar limit to mental health or Substance Use benefits that is not lower than the average limit applied to medical/surgical benefits?						written" Standard 10: Comparative Analysis " Operation"

### Notes:

- Based on the user's response, it is possible that some questions will be skipped, as depicted in the example below.
- The highlighted row is the question being answered.



Demo Commercial Product Line - Standard 4: Annual/Lifetime Dollar Limits					
Plan Information NQTLs Factors Measures Comparative Analys	is Findings & (	Conclusions	Standards		
Standard Questionnaire			Standard 1	Business Management	
			Standard 2	Personnel	
×- ✓ - Minimum do	Document requirer cument requirement	ment below nt complete	Standard 3	Parity Compliance	
QUESTION	TYPE	Based	on the "N	lo" response to	
	Annual	pre	vious que	estion, these	
Does the Organization apply an aggregate [TYPE] dollar limits to either mental health or substance use disorder	• Yes	que	questions were skipped as		
penefits?	O No O	irrelev	ant (i.e. Y	es and No radio	
Does the Organization apply an aggregate [TYPE] dollar limit to at least two thirds of the projected expenditures on medical/surgical benefits?	O Yes	but	tons are <u>r</u>	(QTLs) Requirements	
Does the Organization apply the same aggregate [TYPE] dollar limit to mental health/substance use disorder benefits and medical/surgical benefits?			Standard 8 Nonquantit	Identification of ative Treatment Limitations	
Does the Organization apply an aggregate [TYPE] dollar limit to mental health/substance use disorder benefits that is not lower than the aggregate [TYPE] dollar limit applied to medical/surgical benefits?	Í		This is th	e next relevant	
Does the Organization apply an approach (TVPE) dollar limit to more than one, third but loss than two, thirds of	) Yes		question	(i.e. res and No	

5. Click the row with the relevant next question with the Yes and No radio buttons displaying as enabled.

Demo Commercial Product Line - Standard 4: Annual/Lifetime Dollar Limits			
Plan Information NQTLs Factors Measures Comparative Analys	is Finding	s & Conclusions	Standards
Standard Questionnaire * - ~ - Minimum do	Document req	uirement below ement complete	Standard 1: Business Management Standard 2: Personnel Standard 3: Parity Compliance
QUESTION	Т	(PE	Standard 4: Annual/Lifetime Dollar
	Annual	Lifetime	Standard 5: Benefit Identification and
Does the Organization apply an aggregate [TYPE] dollar limits to either mental health or substance use disorder benefits?	• Yes • No	O Yes	Classification Standard 6: Financial Requirements
Does the Organization apply an aggregate [TYPE] dollar limit to at least two thirds of the projected expenditures on medical/surgical benefits?	<ul><li>Yes</li><li>No</li></ul>		Standard 7: Quantitative Treatment Limitations (QTLs) Requirements
Does the Organization apply the same aggregate [TYPE] dollar limit to mental health/substance use disorder benefits and medical/surgical benefits?			Standard 8: Identification of Nonquantitative Treatment Limitations
Does the Organization apply an aggregate [TYPE] dollar limit to mental health/substance use disorder benefits that is not lower than the aggregate [TYPE] dollar limit applied to medical/surgical benefits?			(NQTLs) Standard 9: Comparative Analysis "As
Does the Organization apply an aggregate [TYPE] dollar limit to more than one-third but less than two-thirds of medical/surgical benefits and apply an aggregate lifetime dollar limit to mental health or Substance Use benefits that is not lower than the average limit applied to medical/surgical benefits?			Written" Standard 10: Comparative Analysis "In Operation"

6. Respond to the question by selecting the appropriate radio button.



Demo Commercial Product Line - Standard 4: Annual/Lifetime Dollar Limits			
Plan Information NQTLs Factors Measures Comparative Analys	is Finding	is & Conclusions	Standards
Standard Questionnaire *- ~ - Minimum do	Document req cument requir	uirement below ement complete	Standard 1: Business Management Standard 2: Personnel Standard 3: Parity Compliance
QUESTION	TYPE		Standard 4: Annual/Lifetime Dollar
Does the Organization apply an aggregate [TYPE] dollar limits to either mental health or substance use disorder	Annual <ul> <li>Yes</li> </ul>	Lifetime	Standard 5: Benefit Identification and Classification
benefits? Does the Organization apply an aggregate [TYPE] dollar limit to at least two thirds of the projected expenditures on medical/surgical benefits?	O No O Yes O No	⊖ No	Standard 6: Financial Requirements Standard 7: Quantitative Treatment Limitations (QTLs) Requirements
Does the Organization apply the same aggregate [TYPE] dollar limit to mental health/substance use disorder benefits and medical/surgical benefits?			Standard 8: Identification of Nonquantitative Treatment Limitations
Does the Organization apply an aggregate [TYPE] dollar limit to mental health/substance use disorder benefits that is not lower than the aggregate [TYPE] dollar limit applied to medical/surgical benefits?			(NQTES) Standard 9: Comparative Analysis "As
Does the Organization apply an aggregate [TYPE] dollar limit to more than one-third but less than two-thirds of medical/surgical benefits and apply an aggregate lifetime dollar limit to mental health or Substance Use benefits that is not lower than the average limit applied to medical/surgical benefits?	<ul><li>Yes</li><li>No</li></ul>		Standard 10: Comparative Analysis "In Operation"

**Note:** Some responses may have an asterisk appear next to the selected response after the radio button has been clicked. The asterisk indicates that additional documentation is required. In such cases, a **Manage Documents** button will display in a grey box specifying the documentation required.

Demo Commercial Product Line - Standard 4: Annual/Lifetime Dollar Limits			
Plan Information NQTLs Factors Measures Comparative Analys	is Finding	gs & Conclusions	Standards
Standard Questionnaire			Standard 1: Business Management
×- ✓ - Minimum da	Document rec	quirement below ement complete	Standard 2: Personnel Standard 3: Parity Compliance
QUESTION	т	YPE	Standard 4: Annual/Lifetime Dollar
	Annual	Lifetime	Limits
Does the Organization apply an aggregate [TYPE] dollar limits to either mental health or substance use disorder benefits?	• Yes	<ul><li>Yes</li><li>No</li></ul>	Classification
Does the Organization apply an aggregate [TYPE] dollar limit to at least two thirds of the projected expenditures on medical/surgical benefits?	• Yes • No *		Standard 6: Financial Requirements Standard 7: Quantitative Treatment Limitations (QTLs) Requirements
Does the Organization apply the same aggregate [TYPE] dollar limit to mental health/substance use disorder benefits and medical/surgical benefits?	<ul><li>Yes</li><li>No</li></ul>		Standard 8: Identification of Nonquantitative Treatment Limitations (NOTLe)
Does the Organization apply an aggregate [TYPE] dollar limit to mental health/substance use disorder benefits that is not lower than the aggregate [TYPE] dollar limit applied to medical/surgical benefits?			Standard 9: Comparative Analysis "As Written"
Does the Organization apply an aggregate [TYPE] dollar limit to more than one-third but less than two-thirds of medical/surgical benefits and apply an aggregate lifetime dollar limit to mental health or Substance Use benefits that is not lower than the average limit applied to medical/surgical benefits?			Standard 10: Comparative Analysis "In Operation"
Please upload documents supporting this response, including an Actuarial Analysis as applicable.			Standard 11: Disclosure of Medical Necessity Criteria Standard 12: Disclosure of Denial Reasons
Document Type Citation			Standard 13: Disclosure of Parity Compliance Analyses for ERISA TPA Organizations



7. Attach the appropriate document(s), where required. For instructions, see **Document Manager**.

#### **Notes:**

- The citation and limit type fields are required to attach a document to a response.
- The list of documents below the table only shows documents for that given question.
- When attaching a document to a given answer, it is possible to make that citation apply to
  more than the context of the most recently given answer. For instructions, see <u>Document</u>
  <u>Manager</u>.
- The user can toggle between questions by clicking on the previous question in the table.
- When clicking that question, the list of documents attached to it populates below.
- If you go back and change the answer, it will delete the documents.

Each document associated with a response will be displayed below the table.

Plan Information NQTLs Factors Measures Comparative Analys	sis Finding	s & Conclusions	Standards	
Standard Questionnaire * - √ - Minimum de	Document req	uirement below ement complete	Standard 1: Business Management Standard 2: Personnel Standard 3: Parity Compliance	
QUESTION	Υ	'PE	Standard 4: Annual/Lifetime Dollar	
	Annual	Lifetime	Standard 5: Benefit Identification and	
Does the Organization apply an aggregate [TYPE] dollar limits to either mental health or substance use disorder benefits?	• Yes	<ul><li>Yes</li><li>No</li></ul>	Classification Standard 6: Financial Requirements	
Does the Organization apply an aggregate [TYPE] dollar limit to at least two thirds of the projected expenditures on medical/surgical benefits?	O Yes ○ No ✓		Standard 7: Quantitative Treatment Limitations (QTLs) Requirements	
Does the Organization apply the same aggregate [TYPE] dollar limit to mental health/substance use disorder benefits and medical/surgical benefits?	<ul><li>Yes</li><li>No</li></ul>		Standard 8: Identification of Nonquantitative Treatment Limitation	
Does the Organization apply an aggregate [TYPE] dollar limit to mental health/substance use disorder benefits hat is not lower than the aggregate [TYPE] dollar limit applied to medical/surgical benefits?			Standard 9: Comparative Analysis "A Written"	
Does the Organization apply an aggregate [TYPE] dollar limit to more than one-third but less than two-thirds of medical/surgical benefits and apply an aggregate lifetime dollar limit to mental health or Substance Use benefits that is not lower than the average limit applied to medical/surgical benefits?			Standard 10: Comparative Analysis "I Operation"	
Please upload documents supporting this response, including an Actuarial Analysis as applicable.			Standard 11: Disclosure of Medical Necessity Criteria Standard 12: Disclosure of Denial Reasons	
Jocument Type Citation			Standard 13: Disclosure of Parity	

### Standards 6 and 7

The Questionnaires on Standards 6 and 7 have the same layout but different questions. Follow the steps below to complete these Questionnaires.

- 1. Select the **Standards** section in the product line navigation bar.
- 2. Select **Standard 6: Financial Requirements** or **Standard 7: Quantitative Treatment Limitations (QTLs) Requirements**, as appropriate, in the sidebar navigation.
- 3. Click the **Questionnaire** tab.



Plan Informa	tion NQTLs	Factors Measures	Comparative Analy	sis Findings & Conclusions	Standards
Standard	3		Questionnaire		Standard 1: Business Management
Do you apply [TYPE] to any mental he	ealth or substance	e use disorder bene	fits within this clas	sification?	Standard 2: Personnel Standard 3: Parity Compliance
			* - ✓ - Minimum do	Document requirement below ocument requirement complete	Standard 4: Annual/Lifetime Dollar Limits
Classification	Deductible	Сорау	Coinsurance	Out-of-pocket maximum	Standard 5: Benefit Identification and Classification
In Network Inpatient	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔵 No	○ Yes ○ No 2	Standard 6: Financial Requirements
Out of Network Inpatient	🔿 Yes 🔵 No	🔵 Yes 🔵 No	🔿 Yes 🔵 No	○ Yes ○ No	Standard 7: Quantitative Treatment Limitations (QTLs) Requirements
In Network Outpatient - Other	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔿 No	🔿 Yes 🔿 No	Standard 8: Identification of Non-
In Network Outpatient - Office Based	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔵 Yes 🔵 No	🔿 Yes 🔵 No	Quantitative Treatment Limitations (NQTLs)
Out of Network Outpatient - Other	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔿 No	🔿 Yes 🔿 No	Standard 9: Comparative Analysis "As
Out of Network Outpatient - Office Based	🔾 Yes 🔵 No	🔵 Yes 🔵 No	🔵 Yes 🔵 No	🔾 Yes 🔷 No	Written"
Emergency Benefits	🔿 Yes 🔘 No	🔿 Yes 🔵 No	🔿 Yes 🔿 No	🔿 Yes 🔿 No	Standard 10: Comparative Analysis "In Operation"
Prescription Drugs	🔾 Yes 🔵 No	🔾 Yes 🔵 No	🔵 Yes 🔵 No	🔿 Yes 🔵 No	Standard 11: Disclosure of Medical Necessity Criteria
				Next	Standard 12: Disclosure of Denial Reasons
					Chandrad 12: Disalassus of Davits

4. In the **Question** table, respond to the question by selecting the Yes or No radio button for each type and each classification.



Plan Informa	tion NQTLs I	Factors Measures	Comparative Analy	sis Findings & Conclusions	Standards
Standard			Questionnaire		Standard 1: Business Management
o you apply [TYPE] to any mental he	alth or substance	e use disorder bene	fits within this clas * ∙ ✓ - Minimum di	ssification? Document requirement below pocument requirement complete	Standard 2: Personnel Standard 3: Parity Compliance Standard 4: Annual/Lifetime Dollar Limits
Taccification	Doductible	Consu	TYPES	Out of pocket maximum	Standard 5: Benefit Identification and Classification
In Network Inpatient	○ Yes ○ No	○ Yes ○ No	○ Yes ○ No	⊖ Yes ⊖ No	Standard 6: Financial Requirements
Out of Network Inpatient	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔵 No	Standard 7: Quantitative Treatment
n Network Outpatient - Other	🔿 Yes 🔵 No	🔿 Yes 🔿 No	🔿 Yes 🔿 No	🔿 Yes 🔘 No	Standard 8: Identification of
n Network Outpatient - Office Based	🔿 Yes 🔵 No	🔾 Yes 🔵 No	🔿 Yes 🔵 No	🔾 Yes 🔷 No	Nonquantitative Treatment Limitation (NQTLs)
Out of Network Outpatient - Other	🔿 Yes 🔿 No	🔿 Yes 🔿 No	🔿 Yes 🔿 No	🔿 Yes 🔘 No	Standard 9: Comparative Analysis "A
Out of Network Outpatient - Office Based	🔾 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔿 No	🔿 Yes 🔵 No	Vvritten" Standard 10: Comparative Analysis "I
Emergency Benefits	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔿 No	🔿 Yes 🔿 No	Operation"
Prescription Drugs	🔵 Yes 🔵 No	🔵 Yes 🔵 No	🔵 Yes 🔵 No	🔿 Yes 🔵 No	Standard 11: Disclosure of Medical
				Next	Standard 12: Disclosure of Denial Reasons
					Standard 13: Disclosure of Parity Compliance Analyses for ERISA TPA

**Note:** Some responses may have an asterisk appear next to the selected response after the radio button has been clicked. The screenshot below shows an example.

The asterisk indicates that additional documentation is required. In such cases, a **Manage Documents** button will display in a grey box specifying the documentation required.



Plan Informa	ition NQTLs Fa	ctors Measures	Comparative Analy	sis Findings & Conclusions	Standards
Standard			Questionnaire		Standard 1: Business Management
					Standard 2: Personnel
o you apply [TYPE] to any mental h	ealth or substance (	use disorder bene	fits within this clas	sification?	Standard 3: Parity Compliance
			+ - ✓ - Minimum de	Document requirement below ocument requirement complete	Standard 4: Annual/Lifetime Dollar Limits
			TYPES		Standard 5: Benefit Identification and
Classification	Deductible	Сорау	Coinsurance	Out-of-pocket maximum	Classification
In Network Inpatient	🛛 Yes 🔿 No 🔺	🔿 Yes 🔵 No	🔿 Yes 🕠 No	🔿 Yes 🔿 No	Standard 6: Financial Requirements
Out of Network Inpatient	🛛 Yes 🔿 No 🔺	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔵 No	Standard 7: Quantitative Treatment Limitations (QTLs) Requirements
In Network Outpatient - Other	🔿 Yes 🔿 No	🔿 Yes 🔵 No	🔿 Yes 🔿 No	🔿 Yes 🔿 No	Standard 8: Identification of
In Network Outpatient - Office Based	🔾 Yes 🔵 No	🔾 Yes 🔵 No	🔾 Yes 🔵 No	🔾 Yes 🔷 No	Nonquantitative Treatment Limitation (NQTLs)
Out of Network Outpatient - Other	🔿 Yes 🔿 No	🔿 Yes 🔘 No	🔿 Yes 🔿 No	◯ Yes ◯ No	Standard 9: Comparative Analysis "As
Out of Network Outpatient - Office Based	🔵 Yes 🔵 No	🔿 Yes 🔵 No	🔵 Yes 🔵 No	🔿 Yes 🔵 No	Written"
Emergency Benefits	🔾 Yes 🔷 No	🔾 Yes 🔵 No	🔿 Yes 🔵 No	○ Yes ○ No	Standard 10: Comparative Analysis "In Operation"
Prescription Drugs	🔵 Yes 🔵 No	🔵 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔵 No	Standard 11: Disclosure of Medical
Please unload document(s) identifying thi	financial			Next	Necessity Criteria Standard 12: Disclosure of Denial
requirement and the benefits to which it a	pplies. Manag	ge Documents		_	Reasons
		_			Standard 13: Disclosure of Parity
Document Classification	Type Cit	ation			Compliance Analyses for ERISA TPA

5. Attach the appropriate document(s), where required.

#### **Notes:**

- The classification, citation and limit type are required to attach a document to a response.
- The list of documents below the table only shows documents for that given question.
- When attaching a document to a given answer, it is possible to make that citation apply to more than the context of the most recently given answer. See <u>Document Manager</u>.
- The user can toggle between questions by clicking on the previous question in the table.
- When clicking that question, the list of documents attached to it populates below.
- If you go back and change the answer, it will delete the documents.

Each document associated with a response will be displayed below the table.



Plan I	nformation NQT	'Ls Facto	rs Measures	Comparative Analys	is Findings & Conclusions	Standards
Standard				Questionnaire		Standard 1: Business Management
o you apply [TYPE] to any mer	ntal health or sub	ostance use	disorder bene	fits within this class	sification? Document requirement below	Standard 2: Personnel Standard 3: Parity Compliance Standard 4: Annual/Lifetime Dollar
				<ul> <li>Minimum do</li> </ul>	cument requirement complete	Limits
lassification	Dedu	ctible	Сорау	Coinsurance	Out-of-pocket maximum	Standard 5: Benefit Identification and Classification
Network Inpatient	O Yes	No 🗸	○ Yes ○ No	🔿 Yes 🔵 No	◯ Yes ◯ No	Standard 6: Financial Requirements
out of Network Inpatient	O Yes	No 🗸	🔿 Yes 🔵 No	🔵 Yes 📄 No	🔿 Yes 🔵 No	Standard 7: Quantitative Treatment Limitations (OTLs) Requirements
Network Outpatient - Other	⊖ Yes	O No	🔾 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔿 No	Standard 8: Identification of
Network Outpatient - Office Based	Yes	O No	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔾 Yes 🔘 No	Nonquantitative Treatment Limitations (NQTLs)
Out of Network Outpatient - Other	⊖ Yes	O No	🔾 Yes ု No	🔾 Yes ု No	🔿 Yes 🔿 No	Standard 9: Comparative Analysis "As
Out of Network Outpatient - Office Bas	sed 🔿 Yes	O No	🔵 Yes i No	🔵 Yes 🔵 No	🔵 Yes 🔵 No	Written"
Emergency Benefits	⊖ Yes	O No	🔾 Yes ု No	🔾 Yes 🔵 No	🔿 Yes 🔿 No	Standard 10: Comparative Analysis "In Operation"
Prescription Drugs	) Yes	◯ No	🔵 Yes 🔵 No	🔵 Yes 🔵 No	🔿 Yes 🔵 No	Standard 11: Disclosure of Medical Necessity Criteria
Please upload document(s) identify requirement and the benefits to wh	ing this financial ich it applies.	Manage [	Documents		Next	Standard 12: Disclosure of Denial Reasons
Document	Classification	Туре	Citation			Standard 13: Disclosure of Parity Compliance Analyses for ERISA TPA Organizations
MHPAEA-FAQs.pdf	In Network Inpatient	Deductible	Page 5 👕			
Compliance-Assistance-Guide-	Out of Network	Deductible	Page 👕			

### 6. Click Next.

The next relevant question with the Yes and No radio buttons enabled will be displayed. This is dependent on the user's response to the previous question. Based on the user's response, it is possible that some questions will be skipped.

#### Note:

If the Yes and No radio buttons do not display for the financial requirement type and classification combination(s), the current question is not relevant or the previous question has no response provided for the respective combination(s). The below screenshots depict an example of such a scenario.



Pla	n Information NQTLs	Factor	s Measures	Comparative Analys	is Findings & Conclusio	ns Standards
Standa	ard			Questionnaire		No response provided (Yes or No not
o you apply [TYPE] to any m	ental health or substa	ince use	disorder benef	fits within this clas	sification? Document requirement beli	selected) for these FR type and classification combinations.
				TYPES	cument requirement comple	
Classification	Deductibl	e	Сорау	Coinsurance	Out-of-pocket maximum	Standard 5: Benefit Identification and Classification
Network Inpatient	O Yes 🔿 N	• •	🔿 Yes 🔵 No	🔿 Yes 🔿 No	🔿 Yes 🔵 No	Standard 6: Financial Requirements
out of Network Inpatient	• Yes O N	• •	🔿 Yes 🔵 No	🔿 Yes 🔵 No	🔿 Yes 🔵 No	Standard 7: Quantitative Treatment
Network Outpatient - Other	O Yes 🔿 N	• *	🔾 Yes 🔵 No	🔿 Yes 🔿 No	🔿 Yes 🔿 No	Standard 8: Identification of
n Network Outpatient - Office Base	d O Yes O N	• *	🔾 Yes 🔵 No	🔾 Yes 🔘 No	🔿 Yes 🔵 No	Nonquantitative Treatment Limitation (NQTLs)
Out of Network Outpatient - Other	🖸 Yes 🔘 N	• *	🔾 Yes 🔷 No	🔾 Yes ု No	🔿 Yes 🔿 No	Standard 9: Comparative Analysis "A
Out of Network Outpatient - Office B	Based O Yes O N	• *	🔿 Yes 🔵 No	🔵 Yes 🔵 No	🔿 Yes 🔵 No	Written"
mergency Benefits	🖸 Yes 🔘 N	• *	🔿 Yes 🔿 No	🔿 Yes 🔿 No	🔿 Yes 🔿 No	Standard 10: Comparative Analysis " Operation"
Prescription Drugs	🔘 Yes 🔵 N	• *	🔾 Yes 🔵 No	🔵 Yes 🔵 No	🔿 Yes 🔵 No	Standard 11: Disclosure of Medical
Please upload document(s) ident requirement and the benefits to v	ifying this financial which it applies.	Manage D	locuments		Next	Standard 12: Disclosure of Denial Reasons
Document	Classification Ty	pe	Citation			Standard 13: Disclosure of Parity Compliance Analyses for ERISA TPA
MHPAEA-FAQs.pdf	In Network De Inpatient	ductible	Page 5 📋			Organizations
			-			

Plan Info	rmation N	IQTLs Factors	Measures	Comparative Analy	ysis	Findings & Con	clusions	Standards
Standard	Standard			Questionnaire	e		T bu	he Yes and No radio ttons are not enabled,
Do you apply this [TYPE] to 100% classification?	of the proje	rojected expenditures for medical/surgical benefits within the same			because these FR type a classification combinati			
				✓ - Minimum d TYPES	- Docu locume	iment requirement co	th	e previous question.
Classification		Deductible	Сорау	Coinsurance	Out-	of-pocket maxim	um	Standard 6: Financial Requirements
In Network Inpatient		🔿 Yes 🔿 No					7/	Standard 7: Quantitative Treatment
Out of Network Inpatient		🔿 Yes 🔿 No				1		Limitations (QTLs) Requirements
In Network Outpatient - Other		🔿 Yes 🔿 No						Standard 8: Identification of Nonguantitative Treatment Limitations
In Network Outpatient - Office Based		🔿 Yes 🔵 No						(NQTLs)
Out of Network Outpatient - Other		🔿 Yes 🕠 No						Standard 9: Comparative Analysis "As Written"
Out of Network Outpatient - Office Based		🔿 Yes 🔵 No					- 1	Standard 10: Comparative Analysis "In
Emergency Benefits		🔿 Yes 🔿 No						Operation"
Prescription Drugs		🔿 Yes 🔿 No						Standard 11: Disclosure of Medical Necessity Criteria
			_			Previous	Next	Standard 12: Disclosure of Denial Reasons
								Standard 13: Disclosure of Parity



### Reporting

ParityManager<sup>™</sup> provides a capability for organizations to generate different automated reports for the selected product line(s), based on the input into the system. The organization's primary point of contact must indicate in the ParityManager<sup>™</sup> Client Intake Form which users should be granted reporting permissions.

#### To access the Reporting section:

- 1. Click on your name in the top right-hand corner on any screen within the system.
- 2. Under **Dashboards**, select **Reporting** from the menu.

Urac'			0	Olesya Lamb 🔹
				Settings
Dashboard				Your Settings
				🍰 Admin Console
Welcome to ParityManager™, URAC's enterprise softwa	re solution created to promote me	ntal health and substance use disorder par	ity compliance. This platform was designed for I	assign Review Team
hird-party administrators, and other organizations to bui	ld, implement, and manage an eff	ective parity compliance program. Whether	r you are using this tool as part of your accredita	
application or as a stand-alone tool to assist you with pa aursuing accreditation, we wish you success as you work	through your application	u and your organization for your commitme	nt to realizing the importance of panty. For thos	Dashboards
	and a fact a factor of the second			# Product Lines
Shawn Griffin, MD			2	B Reporting
President and CEO, URAC			•	
				Teams
Desident Marris	True	Complete		🛩 Demo Team
Product Name	ream	Complete		DL Test Team 2
Demo Commercial Product Line	Demo Team	No		JURAC Testing
Conv. of Demo Commercial Product Line	Demo Team	No		
copy of being contractor inductional	Carlo reall	110		Support
				ParityManager Glossar

3. The Reporting Dashboard will display.

eporting Dashboard				
Welcome to ParityManager <sup>34</sup> , URAC's enterprives designed for health plans, third-party adm Whether you are using this tool as part of your organization for your commitment to realizing to application. Shawn Griffin, MD President and CEO, URAC Step 1 Click all products below you want to include in this representation.	se software solution inistrators, and othi accreditation appli he importance of pa	n created to pr er organization cation or as a s nrity. For those	omote mental health and substance use disorder p is to build, implement, and manage an effective pa tand-alone tool to assist you with parity compliant of you pursuing accreditation, we wish you succes you pursuing accreditation, we wish you succes Step 2 Select a report type below to run your on the number of mediute calented.	arity compliance. This platform rity compliance program. ce – we commend you and your s as you work through your
Product Name	Group Name	Queued	on the number of products selected.	
Sample Medicaid Product Line for PM Report Generation			Single Product Reports - Active • <u>NOTL Analysis</u> -	Group Reports     NQTL Export -
Sample Commercial Product Line for PM Report Generation	Test Product Group		Reports any parity flags found within your plan related to NQTLs.	Exports all NQTLs into an Excel spreadsheet segmented by benefit classifications and product line.
OL Test Product Line for PM Report Testing			Party Flag Report     Tracks any automatically triggered parity	Factor Export -
OL Test Commercial Accreditation Application - Redesigned Standards	Test Product Group		flags based on user input for a given product line.	Exports all factors into an Excel spreadsheet segmented by NQTLs. benefit classifications and product line.
Demo Commercial Product Line		~		
Demo Commercial Product Line 3.24.24				
OL Test Product Line 2.22.24				
OL Factors Section Testing 2.29.24				
Copy of Sample Medicaid Product Line for PM Report				



The reports are separated into two columns:

- Single Product Reports
- Group Reports

If you only select one product line, the reports in the Single Product Reports section will be enabled. If you select more than one product line, the Single Product Reports will become disabled and the Group Reports will be enabled.

#### To generate a report and have it sent to your email address:

- 1. On the **Reporting Dashboard** page, select the product line(s) that you want included in the report in the left-hand column.
- 2. Select the report type in the right-hand column.

### **Example:**

To generate the NQTL Analysis report in PDF with an accompanying Excel sheet, click the **NQTL Analysis** hyperlink under **Single Product Reports**.

Reporting Dashboard				
Welcome to Parity/Manager™, URAC's enterpris was designed for health plans, third-party adm Whether you are using this tool as part of your organization for your commitment to realizing th application. Shawn Griffin, MD President and CEO, URAC	se software solution inistrators, and oth accreditation applin he importance of pa	n created to pri er organization cation or as a s arity. For those	omote mental health and substance use disorder p s to build, implement, and manage an effective pa tand-alone tool to assist you with parity compliant of you pursuing accreditation, we wish you succes	arity compliance. This platform rity compliance program. ce – we commend you and your s as you work through your
Step 1 Click all products below you want to include in this rep	port.		Step 2 Select a report type below to run your on the number of products selected.	report. The report group enabled depends
Product Name	Group Name	Queued	Single Desduct Reports - Active	Group Reports
Sample Medicaid Product Line for PM Report Generation			2 NOTL Analysis -	NQTL Export -
Sample Commercial Product Line for PM Report Generation	Test Product Group		Reports any parity flags found within your plan related to NQTLs.	Exports all NQTLs into an Excel spreadsheet segmented by benefit classifications and product line.
OL Test Product Line for PM Report Testing			Tracks any automatically triggered parity	Factor Export -
OL Test Commercial Accreditation Application - Redesigned Standards	Test Product Group		flags based on user input for a given product line.	Exports all factors into an Excel spreadsheet segmented by NQTLs, benefit classifications and product line.
Demo Commercial Product Line		~		
Demo Commercial Product Line 3.24.24				
OL Test Product Line 2.22.24				
OL Factors Section Testing 2.29.24				
Copy of Sample Medicaid Product Line for PM Report				

3. A pop-up window with the Success message will display. Click **OK**.



Reporting Dashboard			
Welcome to ParityManager™, URAC's enterpris was designed for health plans, third-party admir Whether you are using this tool as part of your a organization for your commitment to realizing th application.	e software solution created to promote mental health and substance histrators, and other organizations to build, implement, and manage a ccreditation application or as a stand-alone tool to assist you with p e importance of parity. For those of you pursuing accreditation, we w	use disorder p an effective pa arity compliand ish you succes	arity compliance. This platform rity compliance program. ce – we commend you and your s as you work through your
Shawn Griffin, MD President and CEO, URAC			
Step 1 Click all products below you want to include in th	$\checkmark$	run your	report. The report group enabled depends
Product Name			Group Reports
Sample Medicaid Product Line for PM Report Generation	Success	1721	NQTL Export -
Sample Commercial Product Line for PM Report Generatio	Report running and will be sent to your email when complete.	hin	Exports all NQTEs into an Excel spreadsheet segmented by benefit classifications and product line.
OL Test Product Line for PM Report Testing		parity	Factor Export -
OL Test Commercial Accreditation Application - Redesigna Standards	OK	en	Exports all factors into an Excel spreadsheet segmented by NQTLs, benefit classifications and product line.
Demo Commercial Product Line	×		
Demo Commercial Product Line 3.24.24			
OL Test Product Line 2.22.24			
OL Factors Section Testing 2.29.24			
Copy of Sample Medicaid Product Line for PM Report Generation			

If you selected the NQTL Analysis report, you will receive an auto-generated ParityManager Report Attached email from the system. In the email, click on the .zip file attachment.

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File Message Hel	p Mimecast Adobe PDF										
S lgnore Delete Archive	Reply Reply Forward Gill +	Share to A Teams Ap	Team Email → To Manager     Team Email → Done     Create New	Kules *     Mave     *     *     *	Assign Mark Categorize Folk Policy - Unread - Up	D Find	A(1) Line Trans Aloud Reader	ate Zoom Rep Sched	ily with uling Poli	Viva Insights	
Delete	кезропа	Teams T Ap	ips 1 Quick Steps	fwl Move	1 Tagi	tal Lating	Innersive   Lang	/age   200m   Fin	o Time I Catch Phish	1 A00-m 1	1
Clientsupport: To © Lamb, Ols OThis sender clientsupport Of these are problems well Click here to download p and, enalysis.cp 756 KB	=urac.org@mg.urac.org on behal te urac.org@mg.urac.org is from outside y n how this meissage is displayed, dick here induce. To net p protect your privacy. Outsi	f of ParityManay our organization, to view it in a web t took prevented auton	ger «clientsupport@urac.org» browse. undre download of some pictures in this message.					[	← Reply. ≪ Roply A8	→ Forward For 1	5/2024 2:41 PM
This email originated fro	m outside of the organization. Do not <i>e</i>	espond or open att	tachments unless you recognize the sender and	know the context is sale.							
			You reques	cently made a request for a new ted document is attached.	v report by ParityManager.	The					
			Questic	eQTL Analysis Report ons? Please reply to this email on <u>envices@urac.org</u> .	or send an email to						
				© 2024 ParityManages	All rights reserved.						
Confidentiality Notice: us immediately by for	This e-mail and any attachmer warding it to securitycomplianc	nts are confider e@urac.org an	ntial. If you are not the intended recip id delete this copy from your system.	vient, be aware that any disclos	ure, copying, distribution or	ruse of this e-ma	il or any attachment is	prohibited. If you	have received this e-m	iil in error, pl	ease notify

The attachment will contain the NQTL Analysis report in PDF and an Excel spreadsheet.

**Note:** Based on the current NQTL Analysis report configuration, the tables in the PDF file should be considered a sample of the data, particularly if the table footer explicitly states this.



The Excel sheet has the full data layout. The Excel file should be considered the source of truth on large tables.

### **Parity Flags**

ParityManager<sup>TM</sup> contains some automation to track parity compliance within your plan. Based on your input into the system, the Parity Flag Report will flag area(s) within your plan as potential parity violations. This occurs when you identify NQTLs in the **NQTLs** section of the application as well as the Questionnaires within the Standards section on Standards 4, 6 and 7.

### **Custom Items**

Organizations may use the default lists of NQTLs, factors, sources, evidentiary standards, and operations measures provided in each respective section in ParityManager<sup>™</sup> or add custom items. Custom items will only be associated with the current product line.

Custom items are available for the following:

- NQTLs
- Factors
- Sources
- Evidentiary standards
- Operations measures

The steps for adding, editing and deleting are the same for all types of custom items.

The screenshots below use custom NQTLs as an example of how to add, edit or delete all types of custom items.

- 1. On the **Dashboard**, select the appropriate product line.
- 2. Navigate to the appropriate page:
  - a. For custom NQTLs, see Identify NQTLs
  - b. For custom factors, see **Identify Factors**
  - c. For custom sources and evidentiary standards, see Sources and Evidentiary Standards
  - d. For custom operations measures, see Measures
- 3. Enter the custom item name into the text box.
- 4. Click Add.



Plan Information	NQTLs Factors	Measures Comparative Analysis	Findings & Conclusions Standar	ds
ride your organization's list of identified NQTLs. Th NQTLs, the other tabs and sections will be popul 1. Identif	nis section is comprised ated with your list. y NQTLs	of three tabs. To complete, click on each tat 2. Define NQTLs	and follow the instructions provided in 3. Apply Benefits to NQTL	n the shaded box. As you identi
entification of NQTLs. URAC has provided you a d dicate whether it is Medical/Surgical or Mental He OTE: If you have saved selected responses to an ic	lefault list of <b>Type</b> i alth/Substar dentified NQ	in the custom item name in the box and click Add.	ation may use this list or add custon assification. aved information will be deleted fro	n NQTLs. For each NQTL listed, m all sections.
ssification it of Network Inpatient <del>-</del>			3 Process for Assessment	of New Technologies
issification it of Network Inpatient - NQTL Plan methods for determining usual customat	ry and reasonable (%)(C	Me D <sup>a</sup> l charges	Process for Assessment ental Health/Substance Use	of New Technologies 4
ssification t of Network Inpatient - NQTL Plan methods for determining usual, customar Plan self-imposed network adequacy standar	ry, and reasonable ("UC	Me R") charges	Process for Assessment ental Health/Substance Use	of New Technologies 4
ssification t of Network Inpatient <del>•</del> NQTL Plan methods for determining usual, customar Plan self-imposed network adequacy standard Prior authorization or ongoing authorization re	ry, and reasonable ("UC ds rauirements (precertifica	Me R") charges tion)	Process for Assessment  antal Health/Substance Use	of New Technologies 4
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ssification t of Network Inpatient  NQTL Plan methods for determining usual, customar Plan self-imposed network adequacy standard Prior authorization or ongoing authorization re Process for Assessment of New Technologies Provider network admission standards Referral requirements Reimbursement restrictions for multiple service	ry, and reasonable ("UC ds equirements (precertifica ees in a single day or we	Me R") charges tion) Custom item will be displaye with an X.	Process for Assessment  Intal Health/Substance Use	of New Technologies 4
ssification t of Network Inpatient - NQTL Plan methods for determining usual, customar Plan self-imposed network adequacy standard Prior authorization or ongoing authorization re Process for Assessment of New Technologies Provider network admission standards Referral requirements Reimbursement restrictions for multiple servic Required use of outcomes measurement tools	ry, and reasonable ("UC ds equirements (precertifica ess in a single day or we	Me R") charges tion) Custom item will be displaye with an X.	Process for Assessment  Intal Health/Substance Use  Intal Health/Substance Use Intal Health/Subst	of New Technologies 4
ssification t of Network Inpatient NQTL Plan methods for determining usual, customar Plan self-imposed network adequacy standard Prior authorization or ongoing authorization re Process for Assessment of New Technologies Provider network admission standards Referral requirements Reimbursement restrictions for multiple servic Required use of outcomes measurement tools Requirements for certain members to submit t	ry, and reasonable ("UC ds equirements (precertifica ess in a single day or we to case management	Me R") charges tion) Custom item will be displaye with an X.	Process for Assessment  Intal Health/Substance Use  Intal Health/Substance Use Intal Health/Subst	of New Technologies 4
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**Note:** Any custom items added are available for selection on the corresponding page across all applicable classifications and benefit categories.

### To edit a custom item:

1. On the page containing the custom item that you want to edit, double-click on the corresponding custom item text. This will enable the NQTL name field to become editable.



Plan Information	NQTLs Factors Measures	Comparative Analysis	Findings & Conclusions Stand	lards
de your organization's list of identified NQTLs. T NQTLs, the other tabs and sections will be popu 1. Ident	This section is comprised of three tabs. To ulated with your list. If y NQTLs 2. Defin	o complete, click on each tab e NQTLs	and follow the instructions provided 3. Apply Benefits to NQTL	I in the shaded box. As you ider
licate whether it is Medical/Surgical or Mental H <b>TTE:</b> If you have saved selected responses to an sofication	Health/Substance Use and identify the re- identified NQTL and you return and unch	spective classification or sub neck that NQTL in this tab, a	-classification. Il saved information will be deleted f	rom all sections.
NOTL		Me	ntal Health/Substance Use	Medical/Surgical
letwork Outpatient - Other - NQTL Plan methods for determining usual, custom	ary, and reasonable ("UCR") charges	Me	ntal Health/Substance Use	Medical/Surgical
ietwork Outpatient - Other - NQTL Plan methods for determining usual, custom: Plan self-imposed network adequacy standa	ary, and reasonable ("UCR") charges	Me	ntal Health/Substance Use	Medical/Surgical
letwork Outpatient - Other • NQTL Plan methods for determining usual, custom. Plan self-imposed network adequacy standa Prior authorization or ongoing authorization or	ary, and reasonable ("UCR") charges ards	Me	ntal Health/Substance Use	Medical/Surgical
NQTL Plan methods for determining usual, custom Plan self-imposed network adequacy standa Prior authorization or ongoing authorization or Process for Assessment of New Technolog	ary, and reasonable ("UCR") charges ards requirements (precertification) pies - Demo Edit Save	Cancel	ntal Health/Substance Use	Medical/Surgical
Ietwork Outpatient - Other • NQTL Plan methods for determining usual, custom: Plan self-imposed network adequacy standa Prior authorization or ongoing authorization or Process for Assessment of New Technolog Provider network admission standards	ary, and reasonable ("UCR") charges ards requirements (precertification) gies - Demo Edit	Cancel	ntal Health/Substance Use	Medical/Surgical
etwork Outpatient - Other • NQTL Plan methods for determining usual, custom: Plan self-imposed network adequacy standa Prior authorization or ongoing authorization or Process for Assessment of New Technolog Provider network admission standards Referral requirements	ary, and reasonable ("UCR") charges ands requirements (orecertification) gies - Demo Edit	Cancel	ntal Health/Substance Use	Medical/Surgical
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etwork Outpatient - Other • NQTL Plan methods for determining usual, custom: Plan self-imposed network adequacy standa Prior authorization or ongoing authorization or Process for Assessment of New Technolog Provider network admission standards Referral requirements Reimbursement restrictions for multiple serv Required use of outcomes measurement tool	ary, and reasonable ("UCR") charges ands requirements (precertification) gies - Demo Edit Save rices in a single day or week Its	Cancel	ntal Health/Substance Use	Medical/Surgical
Ietwork Outpatient - Other •  NQTL  Plan methods for determining usual, custom: Plan self-imposed network adequacy standa Prior authorization or ongoing authorization or Process for Assessment of New Technolog Provider network admission standards Referral requirements Reimbursement restrictions for multiple serv Required use of outcomes measurement tool Requirements for certain members to submit	ary, and reasonable ("UCR") charges ands requirements (precertification) gies - Demo Edit Save rices in a single day or week ts t to case management	Cancel	ntal Health/Substance Use	Medical/Surgical
Network Outpatient - Other • NQTL Plan methods for determining usual, custom: Plan self-imposed network adequacy standa Prior authorization or ongoing authorization or Process for Assessment of New Technolog Provider network admission standards Referral requirements Reimbursement restrictions for multiple serv Required use of outcomes measurement tool Requirements for certain members to submit Requirements that a member attend self-hel	ary, and reasonable ("UCR") charges ands ards gies - Demo Edit Save rices in a single day or week ts t to case management tp programs or classes	Cancel	ntal Health/Substance Use	Medical/Surgical

# 2. Make your changes and click **Save**.

e your organization's list of identified NQTLs. This section is comprised of three tabs. To complete, click on		
QTLs, the other tabs and sections will be populated with your list.         1. Identify NQTLs       2. Define NQTLs	each tab and follow the instructions provided	f in the shaded box. As you id
Interaction Tropics Order has provide you a denated is some of the indiac common Argen reported. In the whether it is Medical/Surgical or Mental Health/Substance Use and identify the respective classification IE: If you have saved selected responses to an identified NQTL and you return and uncheck that NQTL in the ification etwork Outpatient - Other →	Add NQTL here	from all sections.
NQTL	Mental Health/Substance Use	Medical/Surgical
Plan methods for determining usual, customary, and reasonable ( UCR ) charges		
Prior authorization or ongoing authorization requirements (precertification)		
Process for Assessment of New Technologies - Demo Edit Save Cancel		
Provider network admission standards		
Referral requirements		
Reimbursement restrictions for multiple services in a single day or week		
Required use of outcomes measurement tools		
Requirements for certain members to submit to case management		



### To delete a custom item:

	Plan Information	IQTLs Factors Measures Comparative Analysis Findings	& Conclusions Stan	dards
Provid your N	le your organization's list of identified NQTLs. This s IQTLs, the other tabs and sections will be populate 1. Identify N	ection is comprised of three tabs. To complete, click on each tab and follow d with your list.	the instructions provide Benafits to NQTL	d in the shaded box. As you identify
<u>Ider</u> indi NOT	ntification of NQTLs. URAC has provided you a defa icate whether it is Medical/Surgicat or Mental Healt TE: If you have saved selected responses to an iden		nis list or add cus n will be deleted	tom NQTLs. For each NQTL listed, from all sections.
Class	sification	Are you Sure?	NQTL here	Add
In Ne	etwork Outpatient - Other •	Are you sure you want to delete the NQTL "Process		
	NQTL	for Assessment of New Technologies"? It will be removed from any responses where it was used	nce Use	Medical/Surgical
	Plan methods for determining usual, customary, a	and removed normany responses where it was used.		
	Plan self-imposed network adequacy standards	2 Confirm Cancel		
_	Prior authorization or ongoing authorization requi			
X	Process for Assessment of New Technologies	Save Cancel		
	Provider network admission standards			
	Referral requirements			
	Reimbursement restrictions for multiple services	in a single day or week		
	Required use of outcomes measurement tools			
	Requirements for certain members to submit to c	ase management		
		params or classes		
	Requirements that a member attend sett-netp pro			

- 1. On the page containing the custom item that you want to delete, click the X next to the corresponding item.
- 2. In the pop-up window, click **Confirm** to verify intent.

## Support

To request assistance regarding ParityManager<sup>™</sup>, please contact Olesya Lamb, Senior Application Support Specialist.

**Phone:** (202) 326-3957 **Email:** <u>olamb@urac.org</u>

