

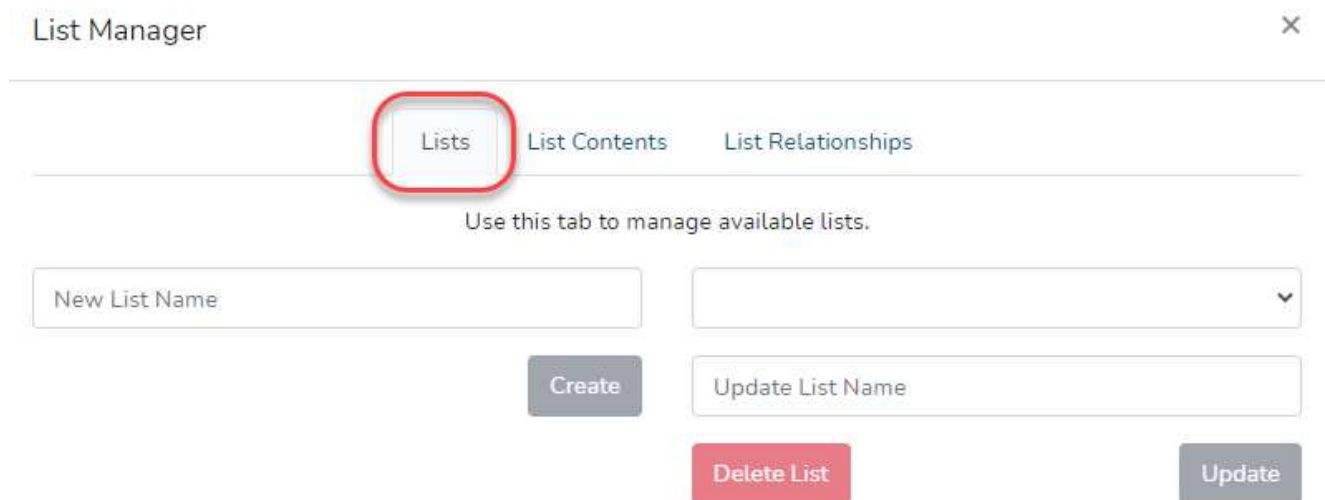
ParityManager™ - List Manager Overview

List Manager is a functionality within ParityManager™ where users can manually type in custom items or upload an excel worksheet (.xlsx) to create custom lists that will be maintained in the background. The need to create a custom list is to account for items that are not present on the default list.

The ability to create a custom list is available within the following standards:

- 5 – benefit classifications
- 8 – identification of non-quantitative treatment limitations (NQTLs)
- 9 – NQTL evidentiary standards or the “as written” analysis
- 10 – NQTL operation measures or the “in operation” analysis

1. Lists Tab



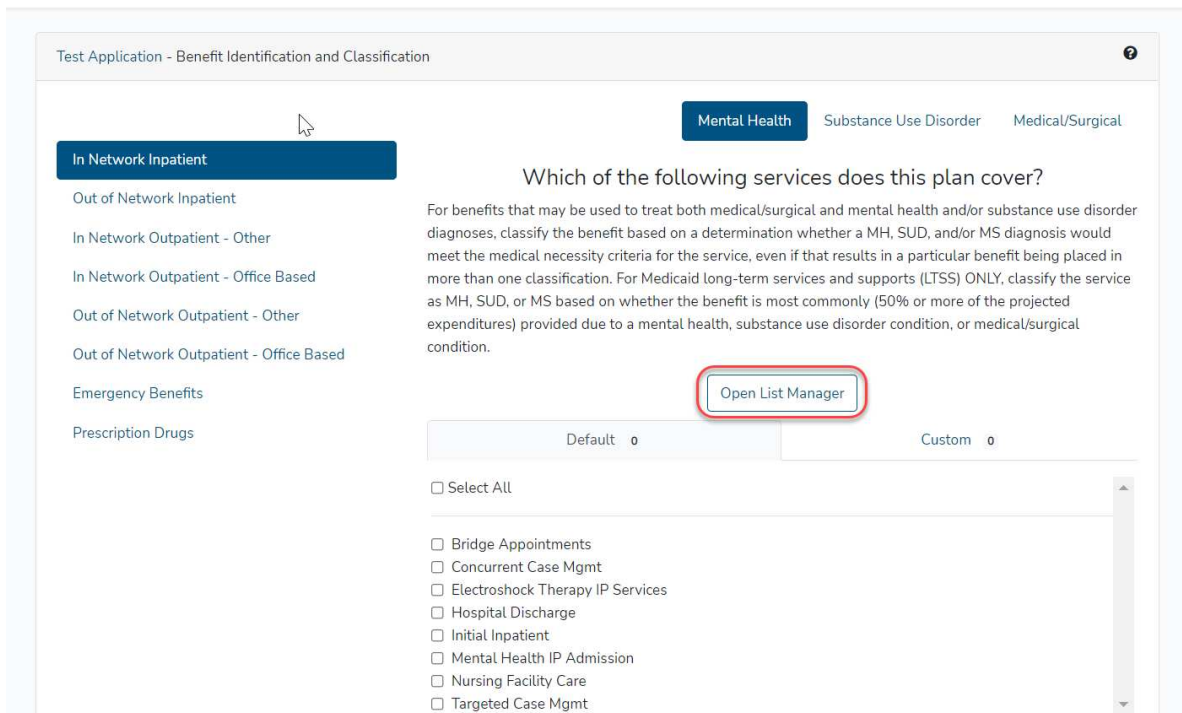
The screenshot shows the 'List Manager' window with a close button (X) in the top right. Below the title bar are three tabs: 'Lists' (highlighted with a red circle), 'List Contents', and 'List Relationships'. Below the tabs is the instruction 'Use this tab to manage available lists.' The main area contains a 'New List Name' text input field, a dropdown menu, a 'Create' button, an 'Update List Name' text input field, a 'Delete List' button (in red), and an 'Update' button.

- a. On the standards landing page, scroll down to the appropriate standard and click the **Questionnaire** link.



The screenshot shows a section titled 'Benefit Identification and Classification'. Below the title are two rows of links. The first row is 'Standards' with a blue 'In Progress' status indicator. The second row is 'Questionnaire' (highlighted with a red circle) with a blue 'In Progress' status indicator.

- b. Click on the **Open List Manager** button.



Test Application - Benefit Identification and Classification

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

Mental Health Substance Use Disorder Medical/Surgical

Which of the following services does this plan cover?

For benefits that may be used to treat both medical/surgical and mental health and/or substance use disorder diagnoses, classify the benefit based on a determination whether a MH, SUD, and/or MS diagnosis would meet the medical necessity criteria for the service, even if that results in a particular benefit being placed in more than one classification. For Medicaid long-term services and supports (LTSS) ONLY, classify the service as MH, SUD, or MS based on whether the benefit is most commonly (50% or more of the projected expenditures) provided due to a mental health, substance use disorder condition, or medical/surgical condition.

Open List Manager

Default 0 Custom 0

☐ Select All

☐ Bridge Appointments

☐ Concurrent Case Mgmt

☐ Electroshock Therapy IP Services

☐ Hospital Discharge

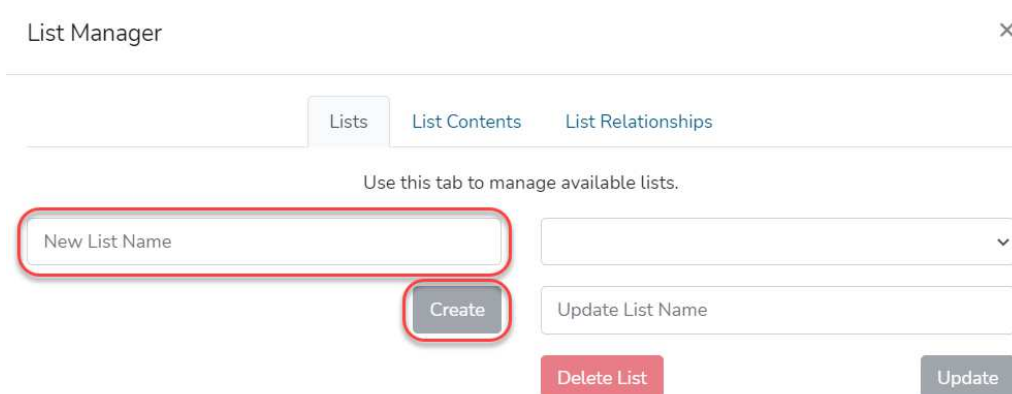
☐ Initial Inpatient

☐ Mental Health IP Admission

☐ Nursing Facility Care

☐ Targeted Case Mgmt

- c. On the **List Manager** pop-up window, enter the new list name in the designated area. Click on the **Create** button.



List Manager

Lists List Contents List Relationships

Use this tab to manage available lists.

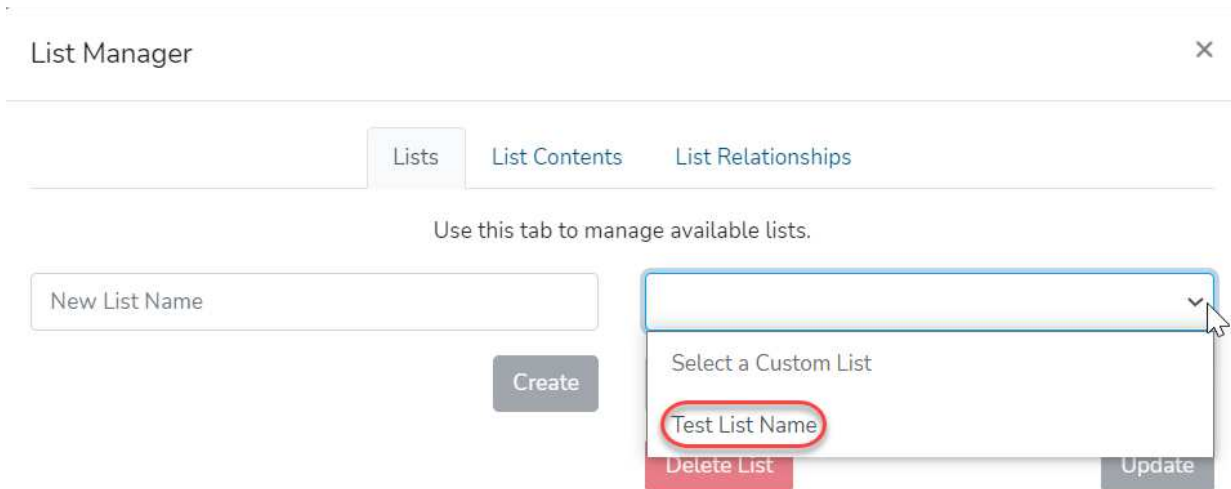
New List Name

Create

Update List Name

Delete List Update

- d. Click on the drop-down menu on the right side of the **List Manager** pop-up window and select the new list name.



List Manager

Lists List Contents List Relationships

Use this tab to manage available lists.

New List Name

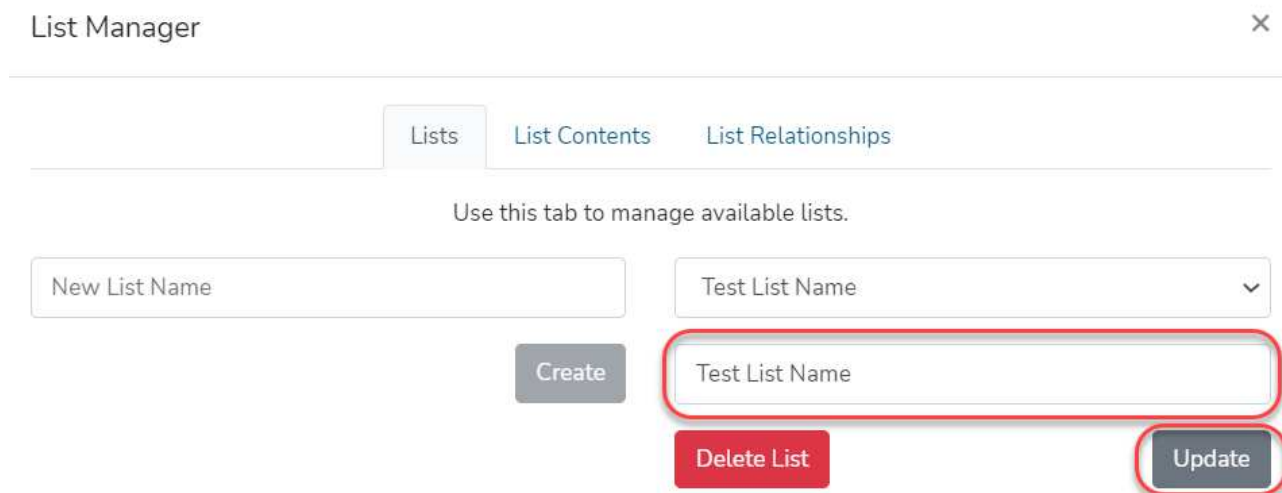
Create

Select a Custom List

Test List Name

Delete List Update

- i. You can update the list name at any time by editing the name in the text box below the drop-down menu. Click on the **Update** button to save changes.



List Manager

Lists List Contents List Relationships

Use this tab to manage available lists.

New List Name

Create

Test List Name

Test List Name

Delete List Update

2. List Contents Tab

List Manager ×

Lists **List Contents** List Relationships

Manage the contents of your list here.

Test List Name ▼ ↻

Add new list item **Add** Update list item **Update** Upload XLSX

« 1 »

- a. To add a new item to the list selected in the drop-down on the **List Manager** window, enter the new list item in the designated area. Click on the **Add** button to create the new list item. The new list item name will be displayed beneath the text boxes.

List Manager ×

Lists List Contents **List Relationships**

Manage the contents of your list here.

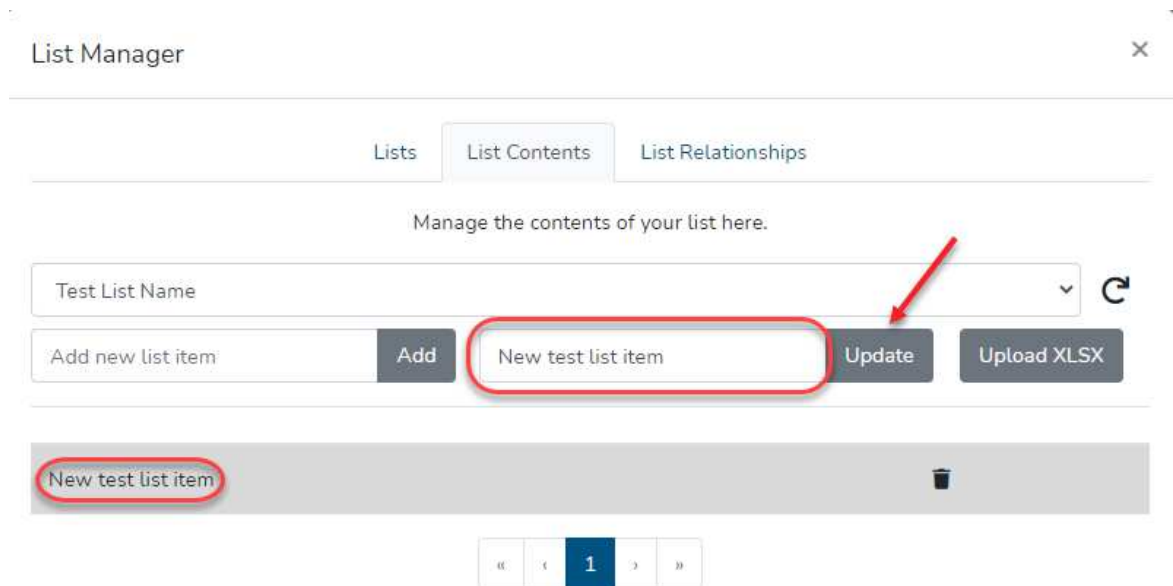
Test List Name ▼ ↻

Add new list item **Add** Update list item **Update** Upload XLSX

New test list item 🗑

« 1 »

- i. To update the new list item name, click on the appropriate list item and update the list item name in the designated area. Click on the **Update** button to save changes.



List Manager

Lists List Contents List Relationships

Manage the contents of your list here.

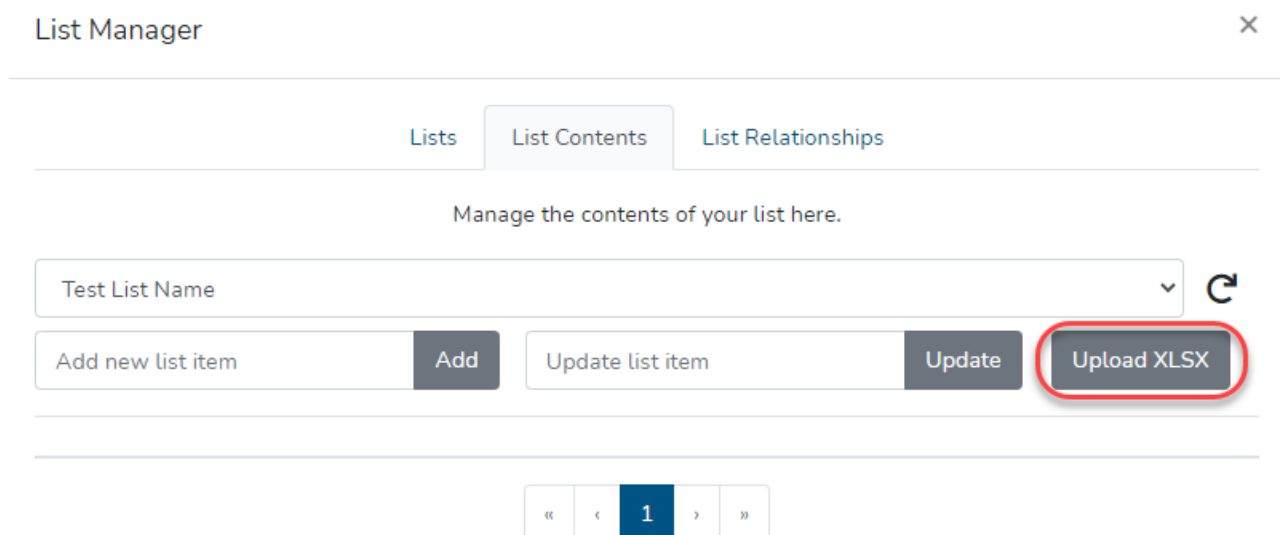
Test List Name

Add new list item Add New test list item Update Upload XLSX

New test list item

« 1 »

- b. To upload a pre-made list from an Excel file, click on the **Upload XLSX** button.



List Manager

Lists List Contents List Relationships

Manage the contents of your list here.



Test List Name

Add new list item Add Update list item Update Upload XLSX

« 1 »

- i. On your computer, select the appropriate Excel file and click on the **Open** button.

Desktop > Test File

Name	Status	Date modified	Type	Size
 Test Excel File		7/21/2021 1:29 PM	Microsoft Excel W...	9 KB

File name: Test Excel File

All FilesOpen

The list of items from the Excel file will populate beneath the text boxes.

List Manager



[Lists](#)

[List Contents](#)

[List Relationships](#)

Manage the contents of your list here.

Test List Name



Add new list item

Add

Update list item

Update

Upload XLSX

Test entry 1



Test entry 2



« ‹ 1 › »

- ii. To delete an item from the list, select the appropriate line item and click the recycle bin icon on the right side.

List Manager

[Lists](#)[List Contents](#)[List Relationships](#)

Manage the contents of your list here.



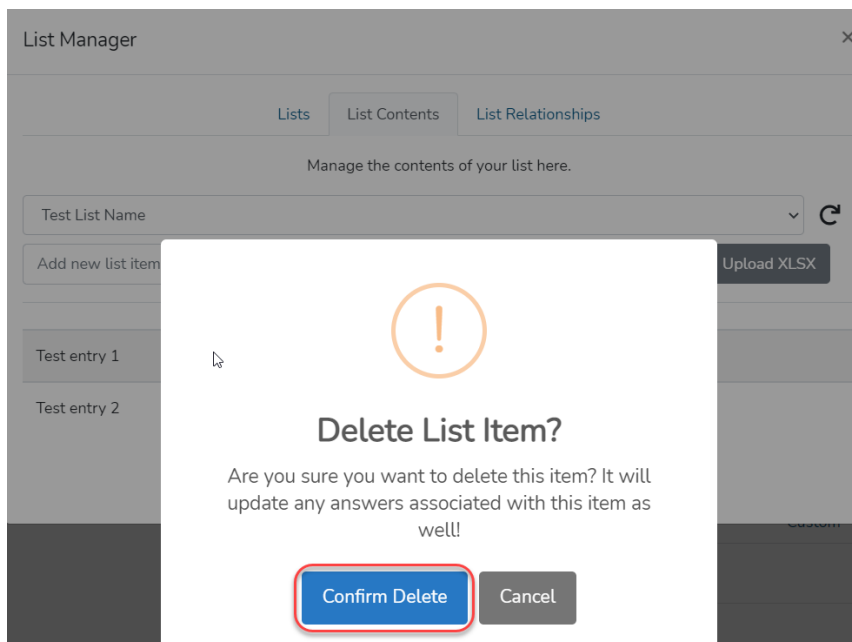
Test entry 1



Test entry 2



iii. In the pop-up window, click on the **Confirm Delete** button.



- c. On standard 5, the List Manager has the functionality to import custom IDs during the custom list upload in Excel. Users can then use those custom IDs to have the corresponding entries populate as auto-selected on standard 8, under the **Link** tab. This is a convenient option if, for example, only a sub-set of custom entries uploaded and selected on standard 5 applies to the benefit selections on S8.3.

NOTE: The custom IDs is an advanced feature. It is only useful for users with large lists and/or making a small number of selections in S8.3 from a much larger list.

To use the custom IDs feature:

- i. First, add custom IDs for the entries in your pre-made list in Excel by assigning a unique number in the first column that corresponds to each entry. The numbers can be arbitrary as long as each entry has a unique number.

	A	B	C
1	Custom ID	Entry Name	
2	1	Custom entry 1	
3	2	Custom entry 2	
4	3	Custom entry 3	
5	4	Custom entry 4	
6	5	Custom entry 5	
7	6	Custom entry 6	
8			
9			
10			
11			
12			
13			

- ii. To upload a pre-made list with the custom IDs from an Excel file, click on the **Upload XLSX** button.

List Manager ×

Lists List Contents List Relationships

Manage the contents of your list here.


Test List Name ▼ ↺

Add new list item **Add** Update list item **Update** **Upload XLSX**

« ‹ 1 › »

- iii. On your computer, select the appropriate Excel file and click on the **Open** button.

Desktop > Test File

Name	Status	Date modified	Type	Size
 Test Excel File	✓	7/21/2021 1:29 PM	Microsoft Excel W...	9 KB

File name: Test Excel File ▼ All Files **Open**

The list of items and custom IDs contained in the uploaded Excel file will populate beneath the text boxes.

List Manager

Lists

List Contents

List Relationships

Manage the contents of your list here.

New Test List

Add new list item

Add

Update list item

Update

Upload XLSX

Custom ID	Name	
1	Custom entry 1	
2	Custom entry 2	
3	Custom entry 3	
4	Custom entry 4	
5	Custom entry 5	
6	Custom entry 6	

«

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- iv. On the standards landing page, select the **Questionnaire** link located beneath standard 8.

8. Identification of Nonquantitative Treatment Limitations (NQTs)

Standards

Questionnaire

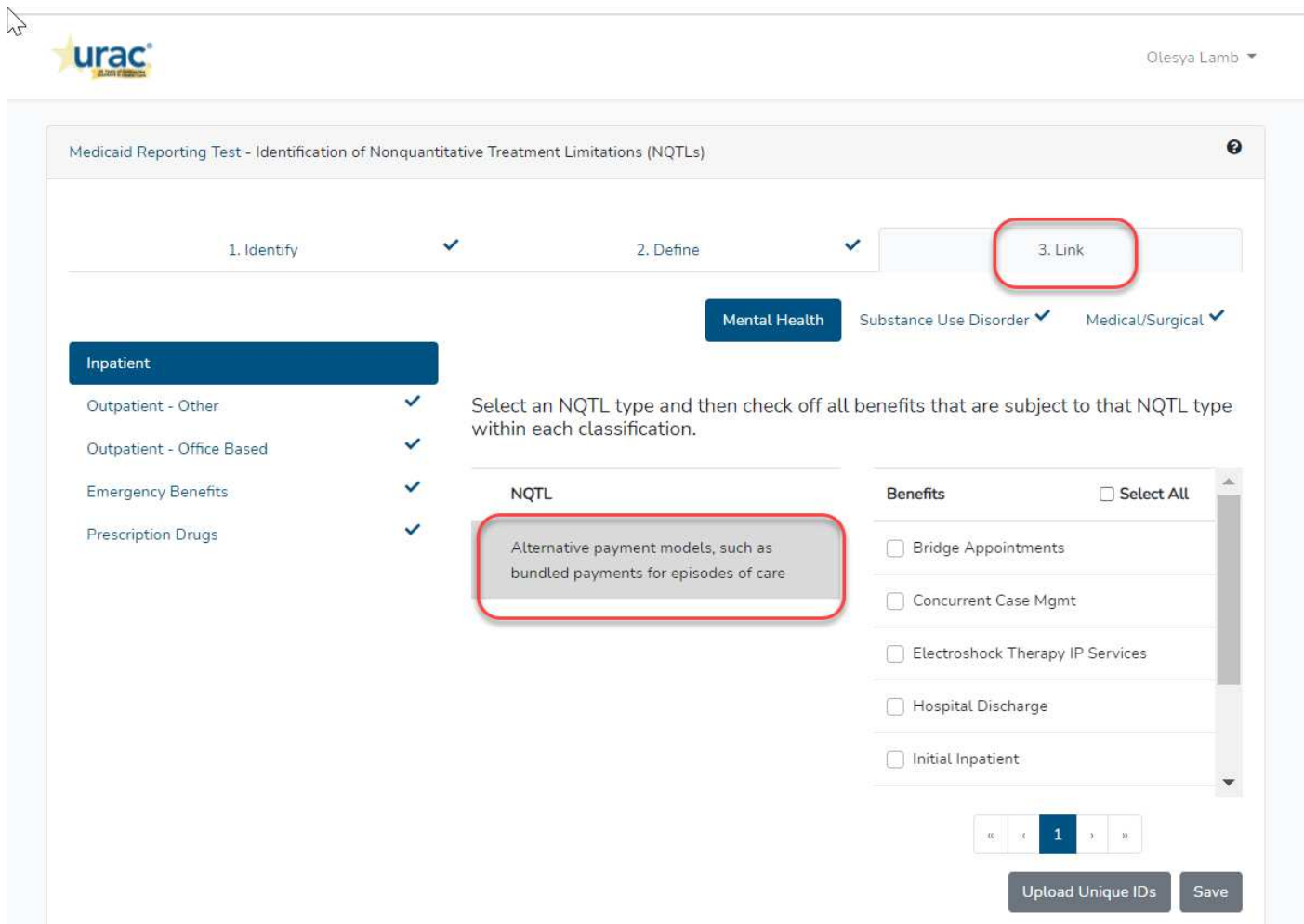
Comparative Analysis

Preview

In Progress

Completed

v. Click on the **Link** tab and then select the appropriate, previously identified NQTL.



urac

Olesya Lamb

Medicaid Reporting Test - Identification of Nonquantitative Treatment Limitations (NQTLs)

1. Identify ✓ 2. Define ✓ 3. Link

Mental Health Substance Use Disorder ✓ Medical/Surgical ✓

Inpatient

Outpatient - Other ✓

Outpatient - Office Based ✓

Emergency Benefits ✓

Prescription Drugs ✓

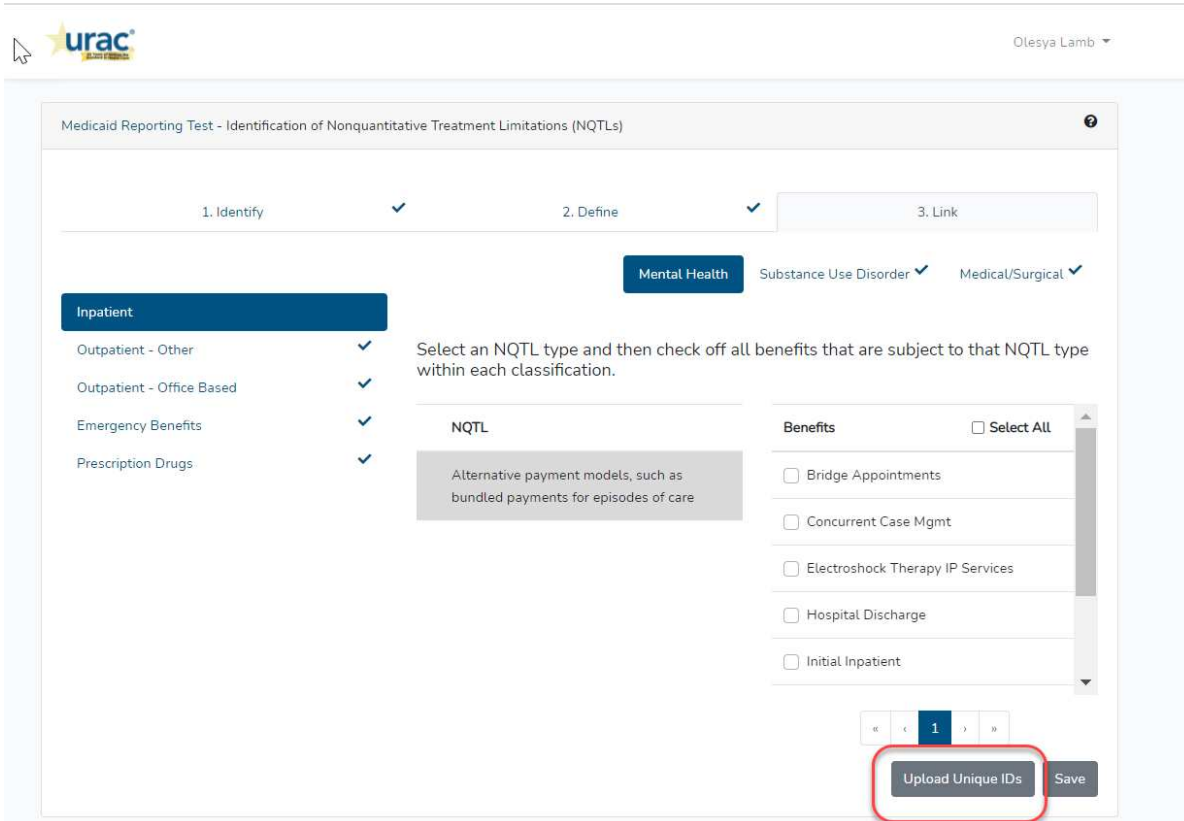
Select an NQTL type and then check off all benefits that are subject to that NQTL type within each classification.

NQTL	Benefits
Alternative payment models, such as bundled payments for episodes of care	<input type="checkbox"/> Select All
	<input type="checkbox"/> Bridge Appointments
	<input type="checkbox"/> Concurrent Case Mgmt
	<input type="checkbox"/> Electroshock Therapy IP Services
	<input type="checkbox"/> Hospital Discharge
	<input type="checkbox"/> Initial Inpatient

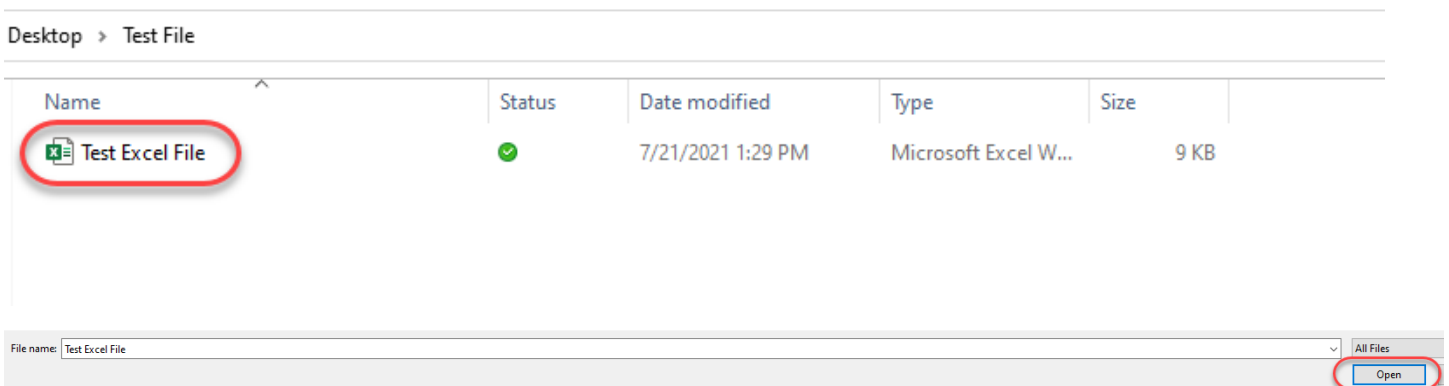
1

Upload Unique IDs Save

vi. Click on the **Upload Unique IDs** button.



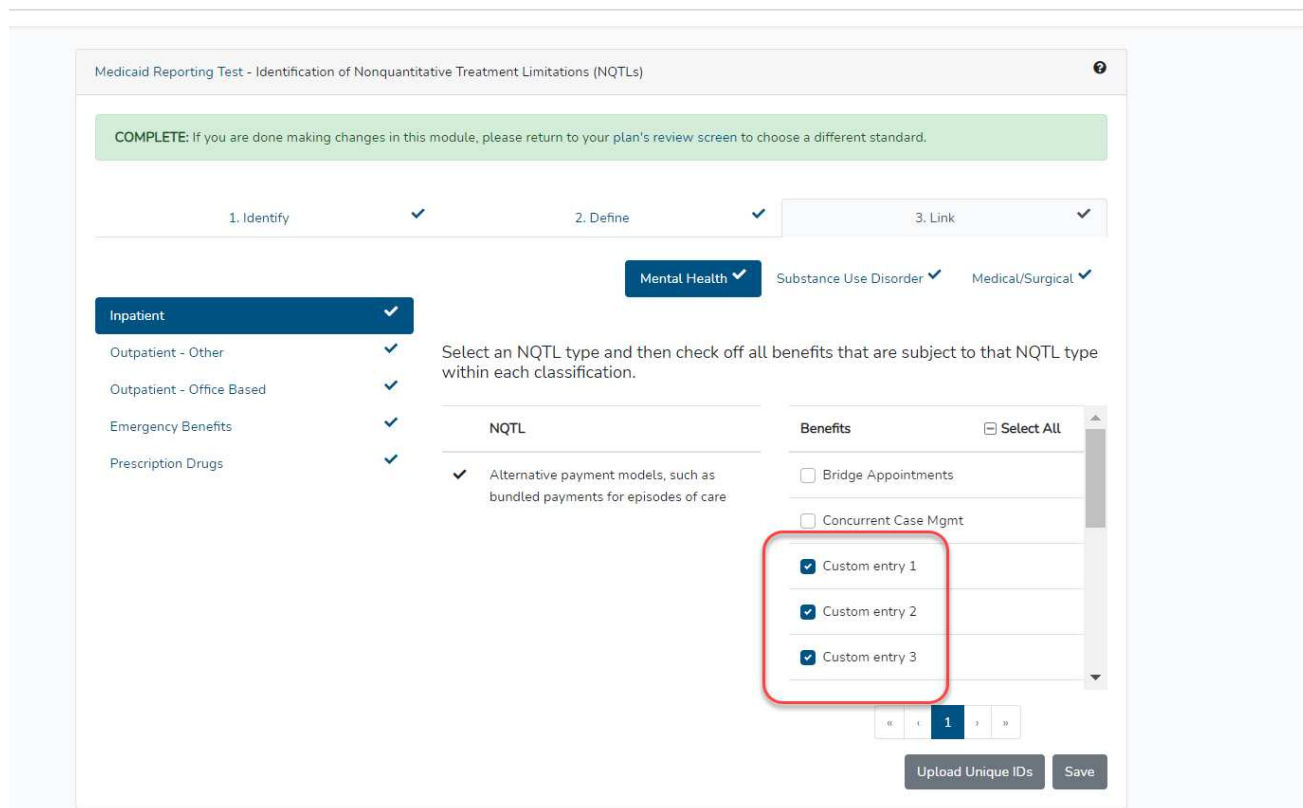
vii. On your computer, select the appropriate Excel file and click **Open**.



The uploaded Excel file should contain only the custom IDs for those entries that should display as auto-selected for the corresponding NQTL. For example, if only the custom entries with the IDs of 1, 2 and 3 in the Excel file should be auto-selected, upload the file that contains only those custom IDs (1, 2 and 3).

The items that correspond to the custom IDs in the uploaded file will be auto-selected, as shown below. Users can manually de-select the entries as necessary.

NOTE: The only benefits that show up on S8.3 are benefits checked on standards 5. Uploading custom IDs in S8.3 that were not selected on standard 5 get skipped.



Medicaid Reporting Test - Identification of Nonquantitative Treatment Limitations (NQTLs)

COMPLETE: If you are done making changes in this module, please return to your plan's review screen to choose a different standard.

1. Identify ✓ 2. Define ✓ 3. Link ✓

Inpatient ✓

Outpatient - Other ✓

Outpatient - Office Based ✓

Emergency Benefits ✓

Prescription Drugs ✓

Mental Health ✓ Substance Use Disorder ✓ Medical/Surgical ✓

Select an NQTL type and then check off all benefits that are subject to that NQTL type within each classification.

NQTL

✓ Alternative payment models, such as bundled payments for episodes of care

Benefits Select All

☐ Bridge Appointments

☐ Concurrent Case Mgmt

☒ Custom entry 1

☒ Custom entry 2

☒ Custom entry 3

1

Upload Unique IDs Save

3. List Relationships Tab

List Manager
×

Lists
List Contents
List Relationships

Please check all boxes this list should apply to below.

Test List Name

	Mental Health	Substance Use Disorder	Medical/Surgical
In Network Inpatient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Inpatient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Network Outpatient - Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Network Outpatient - Office Based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Outpatient - Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Outpatient - Office Based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prescription Drugs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update List Relationships

a. In the drop-down menu, select the custom list.

List Manager
×

Lists
List Contents
List Relationships

Please check all boxes this list should apply to below.

Test List Name

	Mental Health	Substance Use Disorder	Medical/Surgical
In Network Inpatient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Inpatient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Network Outpatient - Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Network Outpatient - Office Based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Outpatient - Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Outpatient - Office Based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prescription Drugs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update List Relationships

- b. Designate the appropriate benefit classification(s) for the selected custom list using the checkboxes. Click on the **Update List Relationships** button to save.

List Manager
×

Lists
List Contents
List Relationships

Please check all boxes this list should apply to below.

Test List Name
▼

	Mental Health	Substance Use Disorder	Medical/Surgical
In Network Inpatient	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Out of Network Inpatient	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Network Outpatient - Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Network Outpatient - Office Based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Outpatient - Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Outpatient - Office Based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prescription Drugs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update List Relationships

As you can see in this example, the selected *Test List Name* will apply to:

- The *In Network Inpatient* benefit classification under the *Substance Use Disorder* benefit category.
- The *Out of Network Inpatient* benefit classification under the *Mental Health* benefit category.

Be sure to designate the appropriate benefit classification(s) for all of your custom lists by selecting each one in the drop-down menu.

- i. To modify the benefit classification(s) on the list, click or unclick the checkboxes. Click on the **Update List Relationships** button to save.

List Manager

[×](#)[Lists](#)[List Contents](#)[List Relationships](#)

Please check all boxes this list should apply to below.

Test List Name

▼

	Mental Health	Substance Use Disorder	Medical/Surgical
In Network Inpatient	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Out of Network Inpatient	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
In Network Outpatient - Other	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
In Network Outpatient - Office Based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Outpatient - Other	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Out of Network Outpatient - Office Based	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Emergency Benefits	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prescription Drugs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Update List Relationships