ParityManager™ Helpful Hints

The following helpful hints are provided to ensure the proper use of the URAC ParityManager™ software platform.

Product Line Terms

Plan type: Organizations must identify if they are a commercial insurer, Medicaid managed care plan or third-party administrator (TPA) prior to inputting information into ParityManager™. This information is typically captured in the contracting stage.

Plan name: Organizations must identify a name for each selected plan type. Note the name that the organization identifies will appear on all ParityManager™ reports. This is captured during the onboarding process but can be modified later by the account owner.

Product line: Within each plan, organizations must identify the name of the health plan product line (e.g., HMO, PPO, EPO, etc.) they will be submitting to ParityManager™. Note the product line name will appear on all ParityManager™ reports. This is captured during the onboarding process but can be modified later by the account owner.

User Types

User: An individual that is associated with an organization that has a license to use ParityManager™. Users have access to all of the standards within ParityManager™. All users associated with a team have the same permissions to enter and edit the team's responses in the system.

Owner: The primary point of contact for the account for URAC. This individual has the same functionality as a user, but also has permissions to copy product lines, edit plan name and product line name, invite and remove team users, and delete existing product lines. Only the user who has the owner role for the team with which they are associated can submit the completed accreditation application for review.

General Information

- Contact your Client Relations Manager for a copy of the standards.
- Accreditation applicants must complete standards 1-13 prior to submitting their application.
- All users must complete the Questionnaire section on standard 5 prior to completing the

Questionnaire section on standards 6-8.
- o Benefits classified in standard 5 will automatically populate subsequent standards.
- All users must complete the Questionnaire section on standard 8 prior to completing the Questionnaire section on standards 9 and 10.
- All users must complete the Comparative Analysis section displayed for standards 8-10. This section is intended for narrative comparability and stringency analysis.
- Look for the check mark (✓) on the right side of every label in the top header of the page within more complex Standards (e.g., contains more than one sub-section) and Questionnaire response sections. The check mark indicates that specific standard or part is complete.
- o In some instances (e.g., NQTL tables), the check mark will also display on the right side of every label in the left navigation menu within the corresponding response section.
- Organizations have ability to use a default or custom list when classifying benefits and identifying NQTLs.
- o These lists are available in standards 5 and 8-10.
- o The default list was compiled based on past experience with carriers and is not meant to be an exhaustive list nor does it carry any weight.
- o Select items on the default list that are applicable to your organization and/or add additional information not listed via the custom option.
- o Users can manually enter custom lists or upload custom lists using an Excel file.
  - ▪ Custom lists allow for a large number of entries but if you have a list larger than 10,000 entries, please notify your Client Relations Manager in advance for assistance.
  - ▪ The system looks to see how many columns the Excel file contains. If there is one column, that is considered the custom entry name. If there are two columns, first column is always custom ID and second column is the custom entry name. Importing custom IDs is an advanced feature and is not required for uploading custom list entries. For more information on the optional custom IDs feature, please see the List Manager How-To document available under the Resources tab in your ParityManager™ account.
- Document Manager is where you can find a copy of all the supporting documentation that you have uploaded into the tool.
- If applying for accreditation, you must click the **I certify this standard is complete** checkbox on the standards response page once you have completed the **Narrative** and **Documentation** sections. This will lock your ability to make any further edits and mark the standards response section as complete.
- o Make sure to click **Save** after inputting any text into the narrative field. Uploading supporting documentation without saving will remove the text in the narrative field.
- o To make further edits, unclick the **I certify this standard is complete** checkbox. Make sure to click **Save** after making any edits.
- A "tour guide" is available on every page within each response section. To use the "tour guide" feature

on a page, click on the question mark icon in the top right corner of the page. The "tour guide" are pop-up text boxes that point to certain elements within ParityManager™ for helpful hints.

Team Owner Features
Copy a Product Line

To help save time on manual data entry, a copy feature is available for use. This copy feature allows the owner to duplicate all previous information and documents associated with an existing product line into a new one.

1. After logging into ParityManager™, click the appropriate product line under *Product Lines*.
2. Click the duplicate icon next to the selected product line.
3. In the pop-up window, click on the **Confirm Duplication** button to create a copy of the selected product line.
4. A copy of the selected product line will display under *Product Lines*.
5. To edit the name of a product line, click the edit icon next to the corresponding product line.

Add/Remove Users

The owner role has permissions to invite and remove users for their team.

1. After logging into ParityManager™, click on your user account name in the top right corner on the **Dashboard** page.
2. Click **Your Settings** under *Settings*.
3. Select the **Teams** tab on the **User Settings** page.

To add a user:

1. Click on the name of the team to which you want to add a user on the **Teams** tab. The system will display the **Invitations** section above the list of users associated with your team.
2. Enter the user's email address into the **Email Address** field and click on the **Send Invitation** button.
3. The user will receive an auto-generated **ParityManager™ Invitation** email to join the team.
   a. If a user already has an active account in ParityManager™, the invitation email will inform them that they have been added to the team automatically.
   b. If a user does not have an active account in ParityManager™, they will click on the **Accept Invite** link in the **ParityManager™ Invitation** email to create their user account.

      i. The **Accept Invite** link is valid for 60 minutes. You will have to follow the steps above to reinvite the user if the link has expired.

To remove a user:

1. Click on the name of the team from which you want to remove a user on the **Teams** tab.
2. Click on the name of the appropriate user under *Users* and then click the recycle bin icon.

Narrative Documentation Requirements

Most standards include a narrative or documentation requirement. The list below is meant to help organizations properly plan for which documents they will need.

Please note that all of these narrative documentation requirements apply to accreditation applicants but only a subset apply to organizations with ParityManager™ license agreements.

- Policies and procedures governing parity compliance program
- Organizational chart
- Resumes/CVs of parity compliance staff
- Job descriptions for clinical leadership staff
- Attendance log for parity compliance training
- Parity compliance training materials provided to staff
- Examples of how the organization documents the parity compliance such as vendor tracking and benefit changes
- Documentation related to potential parity violations, which includes:
  - Regulatory compliance investigations
  - Legal judgements
  - Grievances and findings
- Policies and procedures governing how the organization monitors, detects and identifies potential parity violations and actions taken to investigate
- Policies and procedures related to the application of annual or lifetime dollar limits
- Plan documents outlining covered benefits such as:
  - Schedule of benefits
  - A summary plan description
  - An evidence of coverage
  - A certificate of coverage
  - A certificate of insurance, and
  - An insurance contract, and prescription drug list/formulary

- Plan documents showing each financial requirement type imposed by the plan for medical/surgical, mental health, and substance use disorder benefits
- Policies and procedures governing "substantially all" and "predominant level" test
- Attestations from senior compliance officers, if applicable
- Plan documents describing all NQTLs in use within each benefit classification and associated policies (e.g., utilization management protocols)
- NQTL definitions
- Documentation outlining organization's processes for developing NQTLs for mental health, substance use disorder, and medical/surgical benefits
- Copies of any parity market conduct examination reports or audits conducted by independent third parties, including regulators
- Operational data to assess organization's implementation of NQTLs
- Policies and procedures related to medical necessity requirements
- Policies and procedures governing required disclosures and sample letters
- Policies and procedures governing adverse determination letters and sample letters

Downloading Supporting Documentation and ParityManager™ Report

All users have permissions to download documents and the ParityManager™ report associated with their team's product line.

To download supporting documents:

1. After logging into ParityManager™, select the appropriate product line under *Product Lines*. This will display the **Open Standards** button on the right side of the *Product Lines* heading.
2. Click the **Open Standards** button. This will display the standards landing page.
3. Click on the **Download Supporting Documents** button located at the bottom right corner on the standards landing page.
4. You will receive an email with a link to download a .zip file containing all supporting documents associated with your team's product line.
   - If the system redirects you to login after clicking the download link, your session has timed out.
   - To download documents, you must be logged in and your active team needs to have access to the product line with which the supporting documents are associated.

To download the ParityManager™ report:

1. After logging into ParityManager™, select the appropriate product line under *Product Lines*. This will

display the **Open Standards** button on the right side of the *Product Lines* heading.

2. Click the **Open Standards** button. This will display the standards landing page.
3. Click on the **ParityManager^{TM} Report** button located at the bottom right corner on the standards landing page.
4. You will receive an auto-generated email with a link to download a pdf copy of the report.
    - The report exports the responses to the Questionnaire and Comparative Analysis sections. Responses to the Standards sections are not included.
    - The email will also contain a link for downloading a data sheet in Excel. The data sheet is an export of the services selected on standard 5 and the services/NQTL combination selections made on standard 8.3.